



**THE S. ROBERT LEVINE
SCALING IN ACTION[®] PROGRAM**

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Each year, The S. Robert Levine Scaling in Action[®] Program features leaders of some of the nation's most compelling and promising scaling initiatives who present their work to an audience of funders and advisors. This year, the theme of The S. Robert Levine Scaling in Action[®] Program follows that of the Conference themes, with a focus on systems change as a key to scale.

The Social Impact Exchange is pleased to feature presentations from four leaders this year:

David Peter Stroh, a founder and principal at Bridgeway Partners, is a national leader in the field of systems thinking. He will provide an overview of the field and key concepts.

Rick Reed, Executive Producer, Collaborative Networks at the Garfield Foundation, will discuss the pioneering work of the Garfield Foundation to apply a systems orientation to some of our nation's most challenging and urgent concerns.

Heather Nesle, President, New York Life Foundation, will share the New York Life Foundation's efforts to scale the issue of childhood bereavement in the United States.

Alex Rossides, Founder and Co-President, Social Impact Exchange, will share an update on the new Community of Interest it is coordinating, focused on prevention and care of chronic illness.

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Systems Thinking for Social Change



David Peter Stroh | *Founder and Principal at Bridgeway Partners*

Reprinted with permission from David Peter Stroh, Systems Thinking for Social Change, (Chelsea Green, 2015)

Introduction

Consider the following headlines which are all based on true stories:

- Homeless Shelters Perpetuate Homelessness
- Drug Busts Increase Drug-Related Crime
- Food Aid Increases Starvation
- "Get Tough" Prison Sentences Fail to Reduce the Fear of Violent Crime
- Job Training Programs Increase Unemployment

What is going on here? Why do seemingly well-intentioned policies produce the opposite of what they are supposed to accomplish?

If you look closely at these solutions and many other stories of failed social policies, they have similar characteristics. They:

1. Address symptoms vs. underlying problems
2. Seem obvious and often succeed in the short run
3. Achieve short-term gains that are undermined by longer term impacts
4. Produce negative consequences that are unintentional
5. Lead us to assume that we are not responsible for the problem's recurrence

For example, "get tough" prison sentences do not address the socioeconomic causes of most inner city crime. Although the perpetrators go to prison and pose less of an immediate threat, 95% of them are eventually released back into society – hardened by their experience and ill-prepared to re-enter their communities productively. Nearly half of those released from prison are imprisoned again within the first three years for committing a repeat offense.¹ Moreover, the current system further weakens the infrastructure of these communities because it removes fathers and mothers who can no longer bring up their children – thereby creating more instability and increasing the likelihood of producing a new generation of people who commit crimes. The system also redirects valuable public funds away from the socioeconomic and criminal justice reforms that could reduce crime permanently. Finally, if a formerly incarcerated person commits another crime, he/she is sent back to prison without considering how "get tough" policies might have contributed to the recidivism.

Lewis Thomas, the award-winning medical essayist, observed, "When you are confronted by any complex social system ... with things about it that you're dissatisfied with and anxious to fix, you cannot just step in and set about fixing with much hope of helping. This is one of the sore discouragements of our time."² Thomas went on to say that, "If you want to fix something you are first obliged to understand ... the whole system."

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Systems Thinking for Social Change (cont'd)

Distinguishing Conventional from Systems Thinking

What does it mean to understand the whole system? First, it means to appreciate a situation you want to change through a systemic instead of conventional lens. If you think that a systems lens is too sophisticated and beyond most people's reach, let me assure you that it is child's play.

If you are a parent, remember when your children were young, and you picked up after them. Your child would let his/her clothes pile up on the floor and move onto something more interesting. Eventually, after numerous failed attempts to have them put their clothes in the laundry, you would give up and put them there yourself. Your child would come back and, as if by magic, the clothes had disappeared. "That worked!" he/she concluded. Non-linear cause and effect, time delay, success (from their point of view, not necessarily yours) – these are all signs of a highly competent systems thinker.

Conventional or linear thinking works for simple problems, such as when I cut my hand and put on a band-aid to help the cut heal. It is also the basis for how most of us were taught in school and still tend to think – divide the world into specific disciplines and problems into their components under the assumption that we can best address the whole by focusing on and optimizing the parts.

However, conventional thinking is not suited to address the complex, chronic social and environmental problems you want to solve. These problems require systems thinking, which differs from conventional thinking in several important ways (see Table 1.1 below):

Table 1.1: Conventional vs. Systems Thinking

Conventional Thinking	Systems Thinking
The connection between problems and their causes is obvious and easy to trace.	The relationship between problems and their causes is indirect and not obvious.
Others, either within or outside our organization, are to blame for our problems and must be the ones to change.	We unwittingly create our own problems and have significant control or influence in solving them through changing our behavior.
A policy designed to achieve short term success will also assure long term success.	Most quick fixes have unintended consequences: they make no difference or make matters worse in the long run.
In order to optimize the whole, we must optimize the parts.	In order to optimize the whole, we must improve relationships among the parts.
Aggressively tackle many independent initiatives simultaneously.	Only a few key coordinated changes sustained over time will produce large systems change.

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Systems Thinking for Social Change (cont'd)

For example, if the problem is homelessness, then the solution is not simply providing shelter. Providing temporary shelter is insufficient since people tend to cycle through shelters, the street, emergency rooms, and jails. Moreover, it is too easy to conclude when people remain homeless that they do not want their own place to live when in fact many want the security that comes with permanent housing. In addition, funding shelters tends to undermine both the political will and financial resources required to end homelessness.

Ending homelessness requires a complex long-term response involving affordable permanent housing, support services for the chronically homeless, and economic development. This means establishing new relationships among the various providers who prevent homelessness, those who help people cope with being homeless, and those who develop the permanent housing with support services and jobs that enable people to end homelessness. Aligning providers along this continuum of care towards a goal of affordable permanent housing with support services increases everyone's ability to solve the problem.

The principle that solutions that work in the short run often have negative long-term effects, a phenomenon known as "better before worse" behavior, has significant implications for funders and policy-makers. It raises what foundations call The Philanthropic Challenge, i.e. how to fix a problem now vs. help people over time. It also challenges public policy makers and business leaders to educate their constituents (e.g. private citizens and financial investors) about the risks of alleviating short-term pressures and fears without understanding the potential negative consequences of expedient solutions. In a world that promotes instant gratification, it can be difficult to remind people that "there is no such thing as a free lunch."

This contrasting principle is known in systems terms as "worse before better" behavior. This means that long-term success often requires short-term investment or sacrifice. If you want to motivate people to work towards long-term success, then you as a leader must act in accordance with your own highest, long-term aspirations. The principle challenges leaders to:

- Resist quick fixes that actually undermine long-term effectiveness
- Set realistic expectations with the people they serve
- Target short-term successes that deliberately support long-term results and provide people with true hope instead of false promises

ⁱ Matthew B. Durose, Alexia D. Cooper, Howard N. Snyder, "Recidivism of Prisoners Released in 30 States in 2005: Patterns from 2005 to 2010", U.S. Department of Justice, Office of Justice Programs, Bureau of Justice Statistics, April 2014

ⁱⁱ Lewis Thomas, *The Medusa and the Snail*, NY: Viking, 1979

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Garfield Foundation



Rick Reed | Executive Producer, Collaborative Networks at the Garfield Foundation

Shockingly... one in two people today will be diagnosed with some form of cancer, and incidence rates are only rising. What can be done to stem this epidemic... to bring about a world without cancer? We in the Cancer Free Network are filling in a missing piece of the solution, with a combination of science, and cross-sector collaboration.

What Causes Cancer?

Nature recently released a report with wide-ranging implications: approximately 80% of cancer instances are attributable to environmental exposure and lifestyle decisions, not genetics¹. In particular, a growing body of research points to human-made chemicals as critical contributors. While the vast majority of funding to fight cancer flows into research and technologies to treat cancer, and to promoting lifestyle changes through anti-smoking campaigns and healthier diets, this “third factor” of environmental causes from toxic chemical exposure is largely ignored.




So we are focusing our efforts there, on upstream solutions, to help ensure millions of people never get cancer to begin with. The fact is, ingredients in pesticides, plastics, beauty products, building materials, and much more that surround us wherever we go are slowly building up in our bodies, lowering our resilience and making us sick. Our work is focused on removing these dangers from our communities by transitioning to proven, safe alternatives.

An Integrated Solution

Given the scale and the scope of the challenge, no one organization or sector alone can take on this challenge; a systemic approach is required. That is precisely why we have mobilized forty complementary organizations, all leading nonprofits and funders working across different sectors, into a network aligned on eliminating environmental carcinogens. Together, we are committed to a simple but audacious goal:

Within a generation we will lift the human burden of cancer by driving a dramatic and equitable transition from toxic substances to effective, clean, and safe alternatives.

Network partners collaborate to align and expand existing efforts to get poisonous chemicals out of our bodies, homes, workplaces, and communities. We are structured into five “nodes” of multiple organizations, to maximize synergies:

-  **Health**
Establishing clear implications of toxics on people's health
-  **Advancing Science**
Driving multidisciplinary research on alternatives
-  **Building Power**
Mobilizing vulnerable, exposed communities and allies

-  **Communications**
Building public awareness
-  **Shifting the Market**
Creating demand for and supply of healthy alternatives

All Network partners also receive support via our policy and legal hub, which supports legal strategies and legislative efforts, further strengthening our collective effort to prove the negative effects of toxics, mandate safe alternatives, and ensure their broad accessibility.

¹ S. Wu et al, *Nature* 16166, 2015

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New York Life Foundation



NEW YORK LIFE
FOUNDATION

Heather Nesle | President
Maria Collins | Vice President

Key goals of the initiative:

- Scale the bereavement field to elevate the profile and conversation of childhood bereavement in America by educating the public about the prevalence of bereaved youth and the impact of bereavement on youth
- Collaborate with other funders and different sectors to support bereaved children and families
- Increase access and knowledge of bereavement resources especially for schools and school communities across the nation
- Support evidenced-based practices and efficacy of interventions for bereaved youth and their families, specifically resilience models for youth at times of adverse events, such as a significant loss in a child's life

Brief description of the initiative:

Childhood bereavement is one of society's most overlooked, least understood, yet disturbingly common social issues. An estimated *one in twenty* American children will lose a parent before age 16 and the vast majority of children experience a significant loss by the time they complete high school. Losing a loved one can be an incredibly hard and isolating experience for children, resulting in a wide range of social-emotional, academic, and behavioral issues. Historically, our society's discomfort with childhood grief has resulted in a lack of support for grieving children and the friends, families, schools, and communities who want to help them.

Recognizing the critical need to provide greater support to grieving children and their families, the New York Life Foundation established childhood bereavement as a *key focus area in 2008*. Like many of our corporate foundation peers, we've looked to align our philanthropic strategy with the company's overarching values. Helping families cope with the death of a loved one – both financially and emotionally – is at the heart of our company's mission and day-to-day business, and we quickly learned that supporting grieving children was something our employees and agents were particularly passionate about.

We also learned that bereavement is an issue in urgent need of increased attention and investment. Since 2008, the Foundation has invested over \$30 million dollars to the cause, delivering much-needed aid to bereaved children and their families through strategic grants and partnerships – and, in the process, becoming a pioneering leader in the emerging field of bereavement support.

Although grief impacts almost everyone at some point in time, the field of bereavement support remains under-recognized and under-funded. Currently, the New York Life Foundation is working to *identify key funding partners* to provide greater support to bereaved children and their families. We also need their help to raise awareness and understanding of bereavement as an issue that, despite its everyday occurrence, can have serious long-term effects and needs to be addressed through the development and sharing of best practices, research and dedicated resources.

Along with our bereavement partners, we believe that the field is truly at a tipping point – with the opportunity to infuse a grief-sensitive framework to different sectors of the community to ensure bereaved youth and families are supported. What's needed is a *multi-disciplinary approach* that builds *partnerships across the youth development and public health fields*. If we can equip a range of professionals who work directly with youth with a grief-sensitive lens, it will become more possible to ease the long-term behavioral and emotional impacts of grief by building resiliency, adaptive coping skills and acceptance in bereaved youth.

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New York Life Foundation (cont'd)

Results to date — New York Life's Commitment to the Issue

Here are a few examples of our investments that support building capacity and awareness of the field:

Moyer Foundation/Camp Erin: Direct Service Network through dedicated camps for bereaved youth across the country:

The Moyer Foundation's Camp Erin is the largest national bereavement program for children and teens ages 6-17. Our investment has helped expand their network to more than 45 locations across the United States and Canada, serving over 3,000 bereaved children annually. This investment has increased access to local resources and services for bereaved youth and families through Camp Erin's national best practice program. As a complement, Moyer has engaged with our agent workforce to educate them on how to infuse a grief-sensitive approach to our work as a life insurance business as well as provide resources for bereaved families.

Tragedy Assistance for Survivors Program (TAPS): Investment in bereaved military youth and families:

TAPS is America's only nonprofit Veterans Service Organization chartered solely to assist the surviving families of military members who have died while serving our nation. Since 2011, we have invested in national convenings for bereaved military families so they can be acknowledged, supported and provided with access to resources. Over the course of our long-term investment, we've partnered closely to ensure that access to critical resources are available, adapting our grantmaking strategy to support TAPS' growing and changing needs. This includes providing more support for their National Military Suicide Survivor Seminar as well as scholarship assistance so financial ability is not a detriment for receiving support.

National Center for School Crisis and Bereavement at USC: The Coalition to Support Grieving Students

Our partnership with the National Center for School Crisis and Bereavement to form the Coalition to Support Grieving Students exemplifies our commitment to collaboration, innovation, and development/sharing of best practices in the bereavement space.

In order to probe the issue of grief's impact at school, we supported the first-ever survey of educators on this topic with the American Federation of Teachers (AFT). It revealed that most educators have grieving children in their classrooms, yet *only 7% had received any amount of bereavement training* and a lack of knowledge about how to help grieving students prevented many teachers from reaching out. The study clearly highlighted the critical support gap for bereaved youth in schools: children spend the majority of their waking weekday hours in school, yet many educators and school communities are unequipped to care for the grieving students in their midst.

In response to the need, New York Life partnered with the National Center for School Crisis and Bereavement to form the Coalition to Support Grieving Students, a unique collaboration of the leading professional organizations representing classroom educators, principals, administrators, student support personnel, and other school professionals who came together with a common conviction: grieving students need the support and care of the school community. The Coalition set out to create and share a set of industry-endorsed resources to empower school communities across America in the ongoing support of their grieving students.

After two years of developing and collaborating, the Coalition launched its primary resource, a practitioner-oriented website – grievingstudents.org – at the beginning of 2015. The Coalition's creation of a user-friendly, multimedia site represents a major step forward in enabling educators to learn about the issue of childhood grief and develop an understanding of how to help. The site was featured in multiple educator-focused media resources following the launch, and the Coalition's participating organizations spread the word about the resource to their membership bases through a robust dissemination strategy. The Coalition approximates that it reached around 4.7 million American educators in its first year alone.

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New York Life Foundation (cont'd)

The Coalition's reach continues to expand through the addition of a growing membership of supporting organizations including the American Academy of Pediatrics. In turn, New York Life is helping to build the initiative further through engagement across the company. Currently, we are mobilizing agents to visit school communities as brand ambassadors to offer education and resources on how to support grieving students through our new Grief-Sensitive Schools Initiative. This effort awards small grants to schools that agree to work toward becoming "grief-sensitive."

Key lessons learned

- While childhood bereavement is disturbingly common, it lacks a substantial platform and is not often understood as a serious social and public health issue – making it harder to raise public concern and attract funders. We need to move the needle for grief support to be viewed as a necessity for every community rather than merely a "nice to have."
- Bereavement is not just a stage of life that children "get over"; it can have a serious long-term impact on school functioning, social engagement, and more. For this reason, it's critical to invest in research and best practices for the field as well as direct service support.
- Dollars tend to flow to bereavement causes/organizations in conjunction with newsworthy events (e.g., school shootings, celebrity deaths) – but more ongoing support for the children/families across the country who are grieving every day is sorely needed.
- Grief support shouldn't be viewed as a stand-alone funding issue. Collaborative, cross-disciplinary approaches that integrate grief support with other youth and health resources/services will have the best chances of sustainable, long-term impact. For example, programs that center on resiliency and social-emotional learning are ideal partners in this effort.

What's next

We believe that the next phase of investment strategy for childhood bereavement should include:

- Capacity-building: the Foundation is increasing capacity in the field by raising nationwide awareness of — and concern for — the priorities of bereavement in youth.
- Sustainability: focus on building sustainable initiatives for the field, professional development, and education/awareness building for the public, with the goal of increased understanding of the sector and preparing professionals to serve this underserved population.
- Cross-section of direct service support and resources: continue to foster national collaboration in which direct services for bereaved youth are accessible and funded.
- Research/evaluation: focus on research initiatives that would add value to the larger field by filling gaps and adding standard models, protocols, metrics, and assessments.

Request for support (partners, funding, etc.)

We are seeking alignment with other funders and diverse sectors to elevate this field to a public issue that warrants sustainable resources and partnerships across different sectors – from a communications/public awareness strategy to research-based intervention models to new learnings on the impact of grief on youth. There is a tremendous opportunity for new, multi-disciplinary investment partners to enter the field in order to help integrate the subject of bereavement into youth-serving areas and develop the needed tools and resources to serve bereaved youth and their families beyond the initial stages of grief.

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Systems Transformation Initiative: Health and Chronic Illness

The goal of this initiative is to significantly “reduce the burden of chronic illness in vulnerable communities through both prevention and treatment.” This goal was collaboratively developed by the health funders and other stakeholders that form SIE’s Health Working Group.

This initiative assumes that chronic illness, like most complex problems, is primarily a systems problem and requires a systems change effort that incorporates a set of integrated, interdependent strategies. The work is predicated on creating a broad, cross sector collaborative network that works together on a common strategy to transform the system for preventing and treating chronic illness in the US. The intended approach will address multiple parts of the health system over multiple years, using a systems analysis to inform its strategy and identify key leverage points at which to intervene in the system.

The analysis and network that forms in the first phase of work will focus on major systems dynamics that require shifting. This will result in national level initiatives that support local efforts and bring resources and effective approaches to cities and states (such as policy change and scaling models). Another critical goal of the work is to offer the analysis of leverage areas and places to intervene in a system to help inform state-based and local efforts aimed at systems change.

Work is currently underway. If you are interested in learning more, please contact David Persky at DPersky@growthphilanthropy.org or at 212-551-1148.