Influencing state system change: Lessons from Building Healthier, More Equitable Communities

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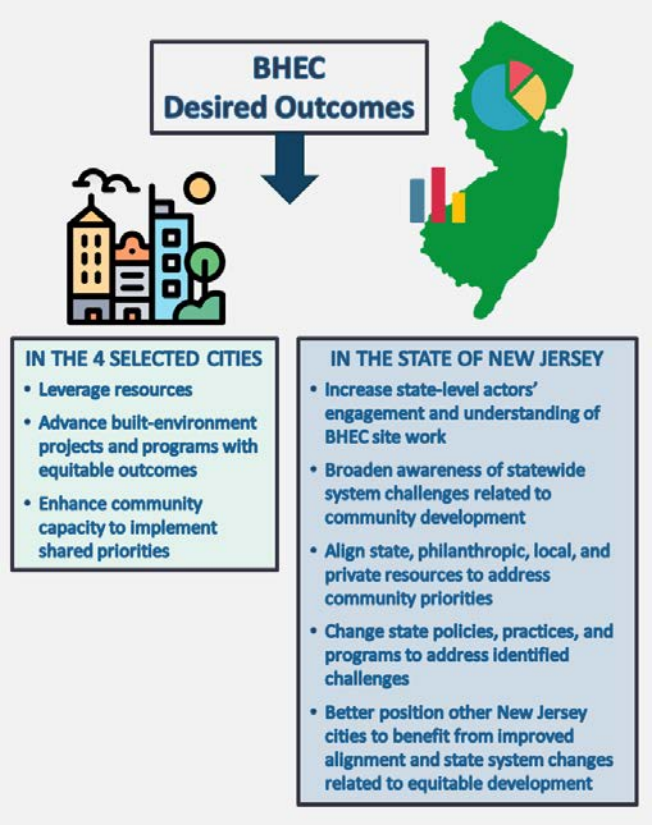
Introduction

In 2020, the Robert Wood Johnson Foundation (RWJF) and Reinvestment Fund jointly launched the *Building Healthier, More Equitable Communities* (BHEC) initiative. The goal of this multi-year effort, centered in RWJF's home state of New Jersey, was to improve the social, economic, and environmental conditions that affect people's health—especially for low-income residents and communities of color—so that everyone has a fair chance to live a healthy life. This initiative emphasized community development, with a focus on built-environment projects that address the social determinants of health. Reinvestment Fund selected four cities to participate: Asbury Park, Camden, Newark, and Paterson. BHEC had two main objectives: **advancing work within each participating site** and **driving statewide system change** to enable healthier, more equitable communities.



While the initiative design supported a variety of site-specific interventions, Reinvestment Fund also prioritized key strategies aimed at achieving state-level outcomes.

In this learning brief, Mt. Auburn Associates examines elements of the BHEC initiative design that may be relevant to funders and intermediaries seeking to influence state-level policies, programs, practices, mindsets, and relationships. This brief primarily focuses on BHEC's approach to engaging advisors, the outcomes advisors have shared regarding how their exposure to site work through BHEC influenced their thinking and actions, and some of the factors that contributed to those outcomes.

The findings presented emerge from the BHEC evaluation research[1] Mt. Auburn Associates conducted over the past four years. This research includes a review of all initiative-related documents, interviews with more than 100 New Jersey stakeholders since the initiative's development and implementation, and observations from all BHEC virtual webinars, advisor meetings, and in-person convenings, including the 2024 BHEC roundtable meeting at the Governor's Conference on Housing and Economic Development in New Jersey.

[1] See the full *BHEC evaluation report* and *executive summary* for a more detailed description of the BHEC interventions and the outcomes observed across the four participating cities.

Approach to state-level system changes

In 2016, prior to BHEC, RWJF, in partnership with Reinvestment Fund, launched Invest Health, a national initiative to improve health equity outcomes in 50 small and midsize cities. Reinvestment Fund, a community development financial institution (CDFI) based in Philadelphia, Pennsylvania, led the initiative. As RWJF tracked the progress of the Invest Health cities, its staff became increasingly interested in the potential benefits of launching a similar multisite initiative focused within a single state. This approach offered the opportunity not only to generate city-specific outcomes but also to influence state-level policies, practices, or other system changes that advance health equity. At the same time, RWJF recognized an opportunity to build on its longstanding investment in its home state of New Jersey. This laid the groundwork for BHEC. RWJF decided to fund this work in a single state based on the hypothesis that concentrating efforts in one location would leverage its prior investments and increase the likelihood of achieving statewide impact through policy changes and by influencing local leaders and state-level decision-makers.

The BHEC initiative design included two key interventions aimed at achieving state-level impact:

1. **Establishing an advisor group:** Engaging a group of state-level advisors to serve as catalysts for state policy and program change.

2. **Facilitating joint advocacy on state policy:** Reinvestment Fund engaged a "city team liaison" to support cities working together on shared issue areas, focusing on addressing common community development challenges. The liaison established several affinity groups to connect a subset of BHEC partners across sites, fostering collaboration on specific issue areas. These groups focused on food systems and access, early childhood education, health systems, and housing policy. In addition, the liaison supported the four cities in advancing their efforts to influence state-level policies.

Establishing an advisor group

Planning phase

In 2019, RWJF and Reinvestment Fund launched a year-long planning phase for BHEC by conducting extensive research. This included an assessment of New Jersey's broader community development landscape, along with interviews and listening sessions with over 150 community development leaders at the city and state levels. These conversations helped identify cities well-positioned to participate in BHEC and enabled Reinvestment Fund to build on RWJF's existing relationships with past grantees and key stakeholders in New Jersey. The planning phase also allowed Reinvestment Fund to immerse itself in New Jersey's community development ecosystem and build connections with statewide actors who would later serve as BHEC advisors. These early conversations strengthened relationships and helped establish BHEC's credibility.

Composition and purpose

In 2020, prior to the site selection for the initiative, Reinvestment Fund convened approximately a dozen representatives from state-level government agencies, research institutions, and nonprofit

advocacy organizations to guide the BHEC work and advise on political, technical, and financial issues, as well as policy change.[2] These advisors were executive leaders in their organizations with decades of experience working in New Jersey. While Reinvestment Fund offered a general overview of the advisors' intended roles, it also envisioned the advisor role as emergent, expecting the advisors' roles to shift as needed to meet the evolving needs of the initiative design.

Evolution of implementation

Between August 2020 and the end of 2022, Reinvestment Fund engaged its advisors in quarterly virtual meetings. As the initiative progressed, Reinvestment Fund wanted to foster a closer connection between advisors and individuals from each BHEC site. To support this, Reinvestment Fund began convening advisors with team members via ad hoc virtual meetings—once in 2023 and once in 2024—and invited advisors to attend the four in-person convenings held in each BHEC city.

Advisors' level of engagement varied significantly by representative; however, a handful of stakeholders from key state agencies and statewide networks were particularly active and engaged.

Facilitating joint advocacy on state policy

Reinvestment Fund believed that the four cities could play a critical role in driving state-level system change by jointly identifying challenges within the community development system and advocating for specific policy reforms and new initiatives to address those challenges. To facilitate this, Reinvestment Fund established cross-city affinity groups comprising representatives from the BHEC cities, focusing on specific issue areas such as food systems and access, early childhood education, health systems, and housing policy.

Reinvestment Fund also worked with BHEC sites to align on shared, overarching community development challenges and jointly advocate for solutions. Early on in the initiative, BHEC sites collaborated on coordinated testimony to the New Jersey governor, advocating for the allocation of American Rescue Plan State Fiscal Recovery Funds toward community development, housing, food systems, and workforce development. Since then, Reinvestment Fund has helped BHEC sites unite around the prospect of advancing land-use policy to provide nonprofits with the right of first refusal for publicly disposed property. As part of this effort, the BHEC city team liaison spearheaded a convening at the Governor's Conference to generate buy-in and support for this concept. The liaison also worked directly with advisors to identify who was best positioned and willing to take the lead in advancing the effort from concept to actual policy change.

[2] See Appendix 1 for a list of the state advisors.

Statewide achievements

The BHEC theory of change specified that the initiative would yield several interim outcomes at the state level beyond the anticipated outcomes in the four participating cities. These desired outcomes included: 1) state stakeholders are engaged and understand site work, 2) actions and learning lead to common understanding of state system challenges related to community development, 3) state, philanthropic, local, and private resources are more aligned to address community priorities, 4) state policies, practices, and programs are changed to address some of the challenges and opportunities identified by the advisory group and sites, and 5) that other New Jersey cities are better positioned to benefit from improved alignment and state system changes related to equitable development.

> *"As a statewide entity, we often try to find the common theme or the common challenge or opportunity…but we don't always get to dig deep with some of our partners about what's happening in their particular development backyard. So that was very helpful."*
> *–BHEC advisor*

Interviews with members of the city teams and advisors suggest that the establishment of a strong group of BHEC advisors, coupled with support from the BHEC city team liaison, contributed to a range of state-level achievements in New Jersey. Achievements include new or revised statewide programs and policies, changes in mindset and organizational approach of state institutions and agencies, and the development of new or strengthened relationships among advisors and between advisors and BHEC sites. Since BHEC influenced state-level actors and their organizations, its impact is likely to extend beyond the four cities directly engaged in BHEC to other municipalities across the state. However, while these additional cities will benefit indirectly, BHEC did not include any concrete interventions to engage New Jersey municipalities beyond the four original sites. In terms of other intended interim outcomes, the research revealed limited evidence of alignment of resources.

The following table reviews the statewide achievements that emerged from BHEC. It is important to note that, in most cases, stakeholders emphasized that BHEC was only one of several factors contributing to the state-level changes detailed in the section below.

State-level achievements to which BHEC contributed	
New or revised statewide programs and policies	▲ Creation of the New Jersey Economic Development Authority (NJEDA) Emerging Developers Grant Program ▲ Modifications of NJEDA's Aspire program ▲ Development of NJEDA's grant program to address food insecurity ▲ Design of the Affordable Housing Support Initiative ▲ Increase in subsidy through the Qualified Allocation Plan ▲ Adjustments to regulations for the Foreclosure Intervention Program ▲ Design of programs offered through the New Jersey Social Impact Investment Fund ▲ Increased momentum toward passing a state right of first refusal policy
Changes in mindset and organizational approach	▲ Holistic neighborhood investment approach for the state's Department of Community Affairs (DCA) ▲ Adoption of a social determinants of health frame by relevant agencies ▲ Greater equity orientation at the NJEDA ▲ Increase in Housing and Mortgage Finance Agency's (HMFA's) responsiveness to communities ▲ Inspiration for HMFA to explore food desert solutions
Development of new or strengthened relationships	▲ Improved coordination among state agencies ▲ New and strengthened relationships among advisors and BHEC cities

"In having folks from my team meet with the team over at BHEC, it was really interesting to see how their advice, how their information, was also helpful in helping us to kind of guide and structure some of the programming we have as we look at our food desert communities." –BHEC advisor

Factors impacting progress

Interviews revealed several factors that influenced the achievements of the BHEC initiative at the state level.

Factors that contributed to state-level outcomes

A planning period that enabled Reinvestment Fund to immerse itself in the New Jersey community development landscape

During a year-long planning phase, Reinvestment Fund, in partnership with RWJF, held conversations with state-level decision-makers. Through this process, Reinvestment Fund became deeply involved in relevant activities across New Jersey, built relationships with key policymakers, and generated interest and engagement in BHEC. These discussions also informed the initiative's design and the niche role BHEC could play to add the most value. This approach also gave BHEC a level of credibility that may have contributed to state actors devoting their time and attention to the initiative. Reinvestment Fund has continued to embed itself in the New Jersey philanthropic community by joining the Council on New Jersey Grantmakers, sharing various approaches to funding based on a CDFI lens, and making connections to help align community development resources.

Involvement of multiple cities within a single state

By engaging multiple sites within one state, BHEC enabled advisors to draw on data and experiences from diverse communities, revealing common challenges to advancing built-environment projects. This evidence helped build the case for state-level stakeholders to take action in creating or modifying programs and policies to address these challenges. While advisors often had anecdotal information about common barriers to equitable community development projects, evidence from four sites in the same state helped confirm the common barriers more systematically.

Previous investments in neighborhood planning

Many BHEC communities had already developed neighborhood plans through participation in New Jersey's Neighborhood Revitalization Tax Credit program and with support from initiatives such as the Wells Fargo Regional Foundation Neighborhood Planning Grants. These planning processes, which included extensive community engagement, provided BHEC teams with a clear and actionable roadmap. Having established this vision, teams were able to accelerate progress and achieve their goals more effectively.

Strong composition of the advisor group

Reinvestment Fund assembled a strong group of executive leaders from the relevant agencies to serve as BHEC advisors. These leaders possessed strong knowledge of the community development system, a comprehensive understanding of the broader statewide context, and decision-making authority.

Advisor exposure to site-level activities via virtual meetings or on-site convenings

Advisors gained significant value from exposure to site-level activities, which influenced numerous advisors to approach their work more holistically and led several to create or modify their agencies'

programs and policies. Exposure to site activities provided advisors with a closer understanding of the work municipalities are undertaking, a clearer sense of where capacity exists, and insight into where site stakeholders could benefit from support.

> *"One thing that I think wouldn't necessarily be a new revelation, but certainly was hammered home, was the difficulty of stacking financing, which we certainly know is a difficulty, but in talking about it, and then having the various state partners, I was really able to see, kind of the multitude of streams going into each of these projects and entities, the difficulties of maneuvering them."*
> *— BHEC advisor*

Reinvestment Fund's frequent, informal contact with state-level actors

Reinvestment Fund's ongoing, informal contact with advisors and other key state-level actors helped build trust and deepen relationships considerably. This regular communication through emails, phone calls, Zoom, and during in-person events fostered more authentic dialogue and created an open forum for information exchange. This, in turn, helped strengthen the community development ecosystem, as Reinvestment Fund staff served as a conduit of information among stakeholders.

Getting cities aligned on common community development issues

At the outset of the initiative, BHEC sites jointly advocated for state investment in community-focused priorities by submitting testimony to the New Jersey governor. Since then, Reinvestment Fund has helped the sites coalesce around a specific land-use policy that would grant nonprofits the right of first refusal for publicly disposed property. Identifying common barriers to community development and collaborating with sites to address these issues has influenced their approach to the work and their agencies' programs and policies.

Factors that limited progress on state outcomes

The launch of BHEC during the COVID-19 pandemic

BHEC launched in the early stages of the COVID-19 pandemic, a time when many cities and state actors were focused on crisis response. As a result, many had limited capacity to fully engage with BHEC at the outset. BHEC site stakeholders' attention centered on addressing urgent needs, including business shutdowns, vaccination efforts, job losses, and food insecurity. These immediate demands shaped how sites prioritized state-level opportunities through BHEC.

During the height of the pandemic, stakeholders had limited ability to step back and strategize around long-term, desired state-level system change goals to address community development challenges. Additionally, the pandemic influenced how Reinvestment Fund initially engaged advisors and sites. Public health guidance on in-person convening required a virtual initiative launch and remote meetings throughout BHEC's first year, which constrained relationship- and trust-building during the early stages of the initiative. This overarching context also influenced the overall design of the BHEC initiative, which may have taken a different form under other circumstances.

Advisors' lack of clarity in fully understanding the desired outcomes of BHEC and their role in achieving those outcomes

Most advisors initially expected to take on a more direct technical advisory role in BHEC built-environment projects than they ultimately did. Many were unaware that the advisory body was intended to serve as the primary mechanism for driving state-level policy change on behalf of BHEC. While BHEC contributed to a number of state-level achievements, the initiative might have driven further system change if the advisors had a clearer charge from the outset. In the final year of BHEC, sites identified a desired state-level policy change, and efforts are underway to pursue it. Still, advisors could have played a more decisive role earlier in the initiative by working with the sites to identify possible policy solutions that address common barriers to equitable community development and then advocating for the desired change. The fact that sites did not identify a statewide policy to pursue until the last year of the initiative was a missed opportunity to leverage the advisors' knowledge and power more intentionally during the initiative to advance statewide policy change. Relatedly, uncertainty over whether sites or a specific advisor's agency would lead the right of first refusal effort resulted in several months of inaction.

Insufficient alignment between BHEC efforts and other existing efforts in New Jersey to pursue a specific land use policy change

When BHEC sites worked with the BHEC city team liaison to advance the right of first refusal policy change efforts, they did not appear to be aware of existing efforts to pursue the same change. There was a missed opportunity to better align and collaborate with state-level actors and legislators already engaged in discussions and drafting legislation on this issue.

Limited utilization of the affinity group model

While the BHEC city team liaison convened several affinity groups during the initiative, only the food affinity group remained consistently active, providing a space for participants to connect and share updates on their work. Those involved valued the opportunity to build relationships and exchange knowledge across sites. However, BHEC could have leveraged the affinity group structure more effectively as a platform for local strategizing around key issues. Overall, the affinity groups lacked a clear purpose, which some stakeholders saw as a missed opportunity to use BHEC to identify significant challenges and pursue statewide system change accordingly. One stakeholder observed, "*I think [the affinity groups] could have been a massive vehicle for the bottom-up change people wanted from BHEC, but they weren't designed or resourced appropriately*."

Key lessons for funders and intermediaries

The state-level achievements influenced by BHEC demonstrate that, with the right approach, multisite initiatives focused within a single state can drive meaningful, lasting change. The BHEC experience also highlights opportunities where a more focused approach could further amplify positive state-level outcomes. Key lessons for funders and intermediaries looking to influence state-level system change include:

1 **Make state-level change an explicit goal.** Clearly articulating state-level policy change in the initiative's theory of change is essential. It defines the intended outcomes and holds intermediaries accountable for designing interventions that offer concrete, actionable pathways to change.

2 **Invest in an intentional, well-resourced planning period.** A thoughtful and adequately resourced planning phase—one that allows time for listening, relationship-building, and reflection—lays the foundation. It helps build trust with state-level actors, deepens understanding of the broader context, and strengthens the initiative's credibility, all of which are essential building blocks for creating an enabling environment for influencing state-level change.

3 **Communicate the pathways for state-level change.** Achieving state-level impact requires a well-defined strategy and clear mechanisms for implementation. Stakeholders need to understand *how* change will happen and *who* will drive it. Whether as city team partners influencing change from the ground or state advisors shaping policy from the top, stakeholders must understand their role in influencing change so they can act more intentionally and effectively.

4 **Be intentional and purposeful when engaging state-level leaders.** The time and attention of state-level advisors are limited—and valuable. Setting clear expectations for their roles and responsibilities, as well as how their contributions support initiative goals, helps ensure their engagement is meaningful, effective, and sustained over time.

5 **Balance flexibility with clarity of purpose.** Emergent, adaptive initiatives benefit from flexibility, but that flexibility must be anchored in a shared purpose. By setting clear expectations around roles, responsibilities, and initiative goals, while still leaving space for roles and approaches to evolve, the necessary structure is in place to enable stakeholders to contribute meaningfully as the work progresses.

6 **Understand the intricacies of the broader statewide context.** To lead policy and advocacy work effectively, intermediaries must be deeply immersed in the broader state context. This allows intermediaries to identify not only key initiative advisors but also other critical stakeholders who are essential to engage in order to advance specific policy goals.

7 **Align cities early around shared state-level goals.** The earlier participating cities align around desired state-level system change goals, the more impact the advisor group can have. Once the goal is clear, advisors are better positioned to serve as champions for the change.

8 **Leverage affinity groups as a strategy for change.** Affinity groups, comprising partners from multiple sites working on a shared issue, can be powerful drivers of state-level system change. Investing time and resources in establishing and strengthening these groups provides an additional, complementary pathway for advancing policy change alongside an advisor group.

The BHEC initiative demonstrates the potential of place-based, multisite efforts to influence state-level systems change—when they are grounded in clear goals, strategic design, and strong relationships. As funders and intermediaries continue to explore new ways to create healthier, more equitable communities, the lessons from BHEC offer practical guidance for aligning local action with state-level influence. The work in New Jersey has shown what's possible—and offers a roadmap for what's next.

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APPENDIX

BHEC advisors

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*Asterisks indicate advisors who did not participate in the advising role for the full duration of BHEC, primarily due to a change in employment.