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# Systems-Change Philanthropy: It's Essential, and It's Our Responsibility

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*By building the capacity for more effective mental health policy development and advocacy, we are creating an environment that will ultimately result in improved access to and quality of mental health services in Texas.*

– Dr. Octavio N. Martinez Jr., executive director,  
Hogg Foundation for Mental Health

## Introduction

Public policy shapes the way neighborhoods are built and resources are allocated. Policy processes determine an individual's access to quality medical care, good schools, healthy food, reliable transportation, and a living wage. Ensuring that the systems, rules, and policies that govern us are equitable is key to building healthy communities and resilient people.

The mission of the Hogg Foundation for Mental Health (2023) is to transform how communities promote mental health in everyday life. Policy engagement has always been a strategic priority for the organization. Through education, the dissemination of policy briefs and system guides, and offering issue-area expertise, technical assistance, training, and legislative testimony, the foundation has become a trusted resource for mental health and substance use policy issues in Texas.

Policy engagement is fundamental to maintaining and improving the social determinants of health (Dawes, 2020). It is the conviction of the Hogg Foundation that until issues of health disparities and racial inequities are prioritized and addressed systematically, a healthy Texas will not be possible. However, the state's mental health advocacy community is limited in size,

## Key Points

- The Hogg Foundation for Mental Health's mission is to transform how communities promote mental health in everyday life. Policy engagement — fundamental to improving the social and structural determinants of mental health — has always been a strategic priority for the foundation, which has become a trusted resource for mental health and substance use policy issues in Texas. Yet, the state's mental health and substance use policy community is limited in size, capacity, and training.
- To address that reality, the Hogg Foundation for Mental Health Policy Academy and Policy Fellow Initiative was launched to invest in a mental health policy academy facilitated by a nonprofit organization and to support community organizations in employing and mentoring full-time policy fellows for two years. The academy provides a structured environment and a curriculum that covers the legislative process and technical policy skills, and it strengthens relationships within and around the Texas Capitol.
- A retrospective evaluation shows that a decade of investment in both the policy academy and policy fellowship has significantly improved the landscape of mental health and substance use policy in the state. Since the program's inception there has been an increase in peer and recovery services and the peer support workforce across the state.
- The initiative also deepened policy fellows' understanding of and ability to navigate the policy arena and increased the capacity of community organizations for effective policy engagement. Alumni have moved into prominent leadership positions, and each cohort adds to a growing network of advocates and organizations working to improve mental health and well-being in Texas.

*In 2010, the foundation launched an initiative called the Hogg Foundation for Mental Health Policy Academy and Policy Fellow Initiative with the goal of bolstering the mental health and substance use policy workforce and developing skilled leaders to make long-term systems change.*

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capacity, and training. To leverage the foundation's investments, the mental health and substance use policy workforce in Texas would need to expand. In 2010, the foundation launched an initiative called the Hogg Foundation for Mental Health Policy Academy and Policy Fellow Initiative with the goal of bolstering the mental health and substance use policy workforce and developing skilled leaders to make long-term systems change.

The initiative supports the policy academy and 10 host organizations to employ and mentor a full-time mental health or substance use policy fellow for two years. Policy fellows have recently obtained graduate degrees in health, policy, law, social work, or other relevant fields. A peer policy fellow is an individual willing to use their lived experience with a mental health or substance use condition professionally, to advance public policy efforts. Policy fellows<sup>1</sup> and their mentors participate in the policy academy, which meets at least monthly and builds participants' knowledge and skills at the same time as they receive hands-on, experiential learning through their work at their host organization.

## Deep Investment

Systems change requires long-term dedication, resilience, and perseverance. Impact takes time and requires constant pressure from knowledgeable, experienced individuals and organizations who prioritize policy change (Dawes, 2020). Significant investment is needed to meaningfully move the needle and mobilize systematic shifts that address inequities and promote mental health and well-being.

The initiative supports policy fellows and host organizations over a two-year policy cycle. Grant funds cover all costs associated with participating in the program, including 95% of the salary and health care benefits for the policy fellow and reimbursement for staff time associated with supervision and mentorship. Policy academy activities, including site visits, expert presentations, networking events, and an experiential learning visit to Washington, D.C., for policy fellows and their mentors, are also fully funded by the policy academy grant. By committing this level of financial support over two years, policy fellows and host organizations are given the opportunity to be fully immersed in policy engagement during the grant period.

This bold approach in many ways is relatively unfamiliar territory for a philanthropic organization like the Hogg Foundation, but results have shown that the initiative has provided a variety of nonprofit organizations the resources needed to prioritize mental health and substance use policy engagement. As a 2016 peer policy fellow grant partner observed,

Having the Hogg Foundation's structured support over two years ensured that we could invest in the development of peer policy fellows and their work and think longer term when goal setting. This is critical to sustainable transformation in the field of mental health and substance use policy.

## Theory of Change

The goal of the initiative is to improve access to and quality of mental health services in

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<sup>1</sup> While there are differences between the two types of policy fellows, both are addressed as "policy fellows" in this article and in program activities. It is important to program officers that fellows see themselves as one cohort and that a distinction is made only when there is a specific reason to acknowledge the peer policy fellow role.

Texas by building capacity and leadership for more effective advocacy, policy development, and legislative implementation. The theory of change involves:

- Increasing the number of knowledgeable and skilled mental health or substance use policy advocates through investing in two-year policy fellowships, offering hands-on work experience and mentorship in the policy arena and creating opportunities for professional development and networking.
- Building workforce capacity to engage in mental health and substance use policy development and advocacy by offering dedicated funding for host organization costs — including 95% of the policy fellow’s salary, a mentorship stipend, general operating funds, technical assistance, and a professional development stipend — with the goal of integrating mental health policy engagement

into the everyday work of grant partner organizations.

- Strengthening collaboration and effectiveness of the mental health and substance use policy advocacy community in Texas by infusing monetary and social capital and providing meaningful space to learn together and cultivate relationships.

### The Program Experience

Throughout the two-year fellowship, the policy fellows focus on diverse and innovative projects and activities that focus on the unique vision and mission of their host organization. These organizations may have a singular focus on mental health or substance use, but many work on several intersecting issues: criminal justice, juvenile justice, child welfare, childhood trauma, forensic mental health, education, and more. The policy fellows explore being researchers, writers, presenters, trainers, organizers, collaborators, and leaders. (See Figure 1.)

**FIGURE 1** Mental Health Policy Academy and Policy Fellow Initiative Map

| YEAR ONE   |   |  |
|--|---|--|
| Policy Engagement Introduction   | Legislative Session Preparation   | Texas Legislative Session  |
| Onboarding of policy fellows into host organizations                                 | Learn about the legislative and budget processes.   | Collaborate with diverse stakeholders on issues of mutual interest.                    |
| Introduction to the academy and policy fellow cohort                                 | Identify priorities and research policy solutions.  | Meet with legislators and staff.   |
| Understanding mental health and substance use policy                                 | Develop legislative relationships and build advocacy collaborations.                              | Provide education and technical assistance.  |
| Deep dive into the various systems (i.e., executive, legislative, judicial branches) | Prepare policy briefs and other support documents.  | Assist with bill development and hearing preparation.                                  |
|  | Build cohorts and networks.   | Provide oral or written testimony.<br>Respond to inquiries.                            |
| YEAR TWO   |   |  |
| Transition to Interim  | Professional Development  | Program Wrap-Up  |
| Evaluate and summarize legislative session outcomes and impact.                      | Build skills and knowledge via policy academy meetings.   | Monitor implementation of legislative priorities.                                      |
| Develop post-session policy strategy.  | Make site visits to host organizations or advocacy partners.                                      | Create transition materials for the work to continue after the fellowship.             |
| Participate in agency rule-making processes.   | Train for career advancement (e.g., resume preparation, interview skills, job search strategies). | Identify ways for policy fellows and host organizations to stay engaged and connected. |
| Continue engagement with diverse stakeholder groups.                                 | Federal immersion experience in Washington, D.C.  |  |

*With the mental health and substance use policy workforce in Texas being so limited, the Hogg Foundation saw tremendous value in investing in the apprenticeship framework to cultivate more mental health and substance use policy professionals.*

### The Initiative's Design

Fellowships, which are essentially modern apprenticeships, have been tested over time and shown tremendous success in supporting a professional pipeline or the continuation of a specific craft. The system of apprenticeship was developed in the later Middle Ages and allowed a master craftsman to employ young people as an inexpensive form of labor in exchange for providing things such as food, lodging, and formal on-the-job instruction (Jacoby, n.d.). With the mental health and substance use policy workforce in Texas being so limited, the Hogg Foundation saw tremendous value in investing in the apprenticeship framework to cultivate more mental health and substance use policy professionals.

Careful consideration was given to designing this initiative, and there are several key elements that have been shown to contribute to its success. There are three grant opportunities for 501(c)(3) nonprofit organizations, governmental entities, or higher education institutions within this initiative:

1. **Policy Fellows:** Five grants are awarded for host organizations who employ and mentor a full-time policy fellow for two years. Each grant partner can be awarded approximately \$150,000 over the two-year funding cycle.
2. **Peer Policy Fellows:** Five grants are awarded for host organizations who employ and mentor a full-time peer policy fellow for two years. Each grant partner can be awarded approximately \$150,000 over the two-year funding cycle.
3. **Policy Academy:** One coordination grant is awarded to plan, coordinate, facilitate, and evaluate the policy academy. This grant partner can receive approximately \$350,000 over the two-year funding cycle. Subcontracts are awarded through the coordination grant, and they include funding for a peer consultant and a coordination consultant to facilitate the Washington, D.C., immersion experience. Program evaluation, speaker stipends, and all site visits — including the trip to Washington for policy fellows and mentors — also are fully supported by the coordination grant.

### Immersion

The two-year fellowship offers the policy fellows direct experience with the mental health and substance use policy process in Texas. Policy fellows work within organizations as full-time employees and collaborate with a broad spectrum of allies — state agencies, school districts, community advocates, legislative offices — to advance issues and make policy gains. Every host organization and policy fellow are different and bring varying skills, interests, and experiences. The program allows for flexibility in what the policy fellow does every day, which issues they work on, and what strategies they use. The policy fellow's role is to contribute effort toward their organizations' goals while learning along the way.

By immersing the fellows in the policy arena, the foundation has been able to witness many organizations make significant policy gains over the two-year grant period. Policy fellows become subject-matter experts, identifying policy implications for proposed legislation, disseminating issue briefs, and helping to improve how legislation is operationalized.

A 2014 policy fellow reported:

Stepping into a new policy area was very daunting because it's so complex. I had to learn very quickly. I finished graduate school at the end of July; I started this fellowship on the first of August; and I was testifying before a Senate committee on the third of August. It was a very quick turnaround!

Policy fellows are also given the opportunity to meet with legislative leadership and collaborate with advocacy partners at state agencies and advisory committees. Over the years, these have included the Texas Judicial Commission on Mental Health, Child Protection Roundtable, Texas Coalition for Healthy Minds, the state's Behavioral Health Advisory Committee, and the Behavioral Health Workforce Subcommittee of the Statewide Behavioral Health Coordinating Council.

### Policy Academy

The policy academy is an integral part of the initiative's success. Policy fellows enter the program with varying levels of education, experience, and understanding of mental health and substance use policy. The academy serves as a dynamic learning community, meeting regularly to help build a sense of camaraderie among the fellows and mentors while providing professional development opportunities and issue-specific presentations from experts in the field. These policy academy sessions include:

- The Texas legislative process: A primer
- Texas Budget 101
- Bill reading and policy analysis workshop
- The public mental health system
- Mental health and the criminal justice system
- Addressing racial disparities
- Children's mental health
- Medicaid

*The academy serves as a dynamic learning community, meeting regularly to help build a sense of camaraderie among the fellows and mentors while providing professional development opportunities and issue-specific presentations from experts in the field.*

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- Communicating effectively with policymakers and staff
  - Administrative advocacy: Working with state agency leadership

The academy offers robust professional development experiences that run parallel to the fellowship's direct, hands-on training. In addition to monthly meetings, fellows go on site visits to local service providers, intellectual and developmental disabilities facilities, courts, jails, residential treatment centers, state hospitals, and other institutions that play key roles in the mental health system. The academy focuses on building knowledge and skills while also offering opportunities for both the policy fellows and their host organizations and mentors to build relationships and strengthen the network of mental health and substance use policy advocates in the state. With optional social events for program participants — dinners, watch parties for election debates or committee hearings, and even mini golf — the policy academy provides a consistent, reliable space for meaningful reflection, fellowship, networking, and shared learning.

Integral to the initiative's design is the coordination grant the foundation offers to provide the organizational backbone for facilitating policy academy programming: meetings, mentorship,

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collaboration, networking, and experiential field trips. This coordination also involves consistent communication with the fellows and mentors about meeting planning and other logistics.

A 2022 coordination grant partner described the academy as “a safe and comfortable space” where participants can “talk about their personal experiences and ask tough questions. It’s not a formal learning environment — it’s more of a learning collaborative.”

#### Federal Experiential Learning Activity

Even though this initiative has a Texas focus, foundation staff knew that the state’s political process was always connected to what is happening nationally. To truly understand the levers of policy change at every level of government, staff felt it necessary to expose the policy fellows to the federal mental health and substance use policymaking process. Therefore, during each two-year cohort cycle, fellows, their mentors, representatives from the policy academy coordinator team, the peer policy consultant, and Hogg Foundation policy staff travel to Washington, D.C., for a five-day educational and skill-building immersion experience.

Each day has a packed agenda curated to the interests of the policy fellows, and includes a mix of opportunities: a stop at the U.S. Capitol, presentations from national policy experts and meetings with congressional office staff, visits to museums and historic buildings, and team-building activities that strengthen relationships among the policy fellows and the host organizations.

#### Peer Policy Fellows

Until the Hogg Foundation funded the peer policy fellows track in 2016, consumer and peer organizations struggled to develop the organizational capacity needed to meaningfully participate in policy development in Texas. Knowing the power that those voices could have in shaping mental health and substance use policy, the foundation added a parallel peer policy fellowship opportunity for those who have lived experience with a mental health or substance use condition and are willing to share their experiences publicly to promote policy change. The goal was to amplify the voices of peers and consumers with investments in building their knowledge and skills to advocate more effectively for policy change.

In 2014, foundation staff worked with a peer consultant who observed activities and offered recommendations for the design of the peer policy fellow track. Once those fellowships began, funding was allocated to continue the consultant’s role in supporting the peer policy fellows and their host organizations, connecting the policy academy to resources, and inviting consumer advocates to meet with the policy fellows.

Foundation staff said that it quickly became evident that the peer policy fellow track would become one of the most powerful elements of the initiative. Alumni reported that the conversations between those with formal policy backgrounds and those with lived experience significantly deepened their understanding of the policymaking process and its impacts. Fellows observed that building those relationships brought a human dimension to legislation. Grant partners said they came to recognize that

the consumer voice is an invaluable asset in policy development. Many host organizations have remained committed to engaging those with lived experience in their policy work and have become some of the most vocal advocates for inclusion at every level of policymaking. “Real world people don’t speak ‘policy wonk’ and policy wonks often cannot hear real world speak,” remarked a 2018 peer policy fellow grant partner. “We need translators that can navigate both worlds.”

A mentor for a 2020 fellow observed:

The peer policy fellowship served as an entry point for the peer voice into the conversation. The connection to the Hogg Foundation gave the peer voice institutional credibility. Being in the room is one thing, and having a voice at the table is something totally different.

## Retrospective Evaluation

After a decade of investment in this strategy, the foundation wondered: In what ways is the initiative making an impact? What lessons were learned over time? To answer those questions, policy fellow alumni and other participants were invited to share their experiences and insights into whether the program:

- deepened policy fellows’ knowledge of public policy and mental health advocacy;
- increased policy fellows’ skills in navigating the policy and advocacy arena in Texas;
- retained alumni in policy, mental health, or related fields after their fellowships;
- increased grantee organizations’ ability to participate in mental health policy; and
- created a stronger network of mental health advocates in Texas.

A mixed-methods, retrospective evaluation approach involved document review, interviews, observation, and quantitative and qualitative survey analysis. Two online surveys were developed, each for a specific subgroup: subgroup A,

policy and peer policy fellows, and subgroup B, representatives from host organizations or mentors. Participation was voluntary and the estimated time required to complete each survey was 30 minutes for subgroup A and 15 minutes for subgroup B.

Subgroup A had 34 respondents, a 65% response rate, and subgroup B had 17 respondents, a 38% response rate. Policy fellows who had a meaningful experience in the program might have been more likely to respond due to their appreciation for the foundation’s support, and those who did not find the program as beneficial could have been less likely to participate. Others might not have had time to answer the questions or might not have received the survey. There was a good-faith effort to locate contact information for each policy fellow, host organization supervisor, and mentor; however, it was more difficult to find email addresses from those in earlier cohorts.

Emphasis was put on using quotes from respondents to illustrate retrospective findings, rather than focusing on the quantitative data that would offer less dependable conclusions. The evaluation and research were conducted by the Hogg Foundation’s strategic learning and evaluation program officer. Even though objectivity was a chief priority, bias and omissions can occur when conducting an internal evaluation. To address those issues, multiple individuals inside and outside of the organization engaged in peer review. These methods helped to secure as much accountability and objectivity in the process as possible, under the project constraints.

Throughout the evaluation process, respondents — like the 2014 policy fellow quoted below — shared a variety of ways that the policy fellow program meaningfully impacted their lives.

The policy fellows program introduced me to the world of advocacy. It provided me the tools and experience I needed to understand how to impact policy for underrepresented communities. I always knew that the world could be a better place and that there are tangible ways to get there; the policy



*Although every transition into a new professional capacity involves a learning curve, the policy academy dispenses with the pretense that fluency is required of policy fellows straight out of the gate.*

fellows program helped me to turn those ideas into action. Since the policy fellow program, advocacy has become an inseparable part of my life.

### The Policy Academy

Although every transition into a new professional capacity involves a learning curve, the policy academy dispenses with the pretense that fluency is required of policy fellows straight out of the gate. Results from the alumni survey<sup>2</sup> showed significant gains in knowledge and skills over the two-year grant cycle. At the beginning of the program, 73% percent of the fellows reported that they felt “slightly” or “not at all” knowledgeable about public policy and mental health advocacy and 83% said they were “not at all” or only “slightly skilled.” After completing the program, 84% said they were “very” or “extremely knowledgeable” and 80% reported being “very” or “extremely skilled.”

Ninety percent of policy fellows agreed that they now can effectively engage in the policy process and advocate for change. A 2018 peer policy fellow said,

This fellowship and policy academy have given me the confidence I lacked as a person with lived experience to be able to sit with individuals with degrees and decades of professional experience and know that my voice matters — my ideas and experiences matter — when it comes to finding solutions that actually work.

One hundred percent of host organizations agreed that the program increased collaboration and strengthened the network of mental health advocates. Program consultants reported that the policy academy served as the platform for regularly connecting policy fellows who work across various organizations and strengthening the network of mental health and substance use policy advocates in Texas.

### Federal Immersion Experience

Hogg Foundation staff have learned that the federal immersion experience is another important vehicle for achieving many of the program’s objectives.

One of the main goals of the program is to ignite the participants’ passion for policy engagement and support them as they find the confidence to enter the arena and make a difference. Coordinators have found that opportunities to talk directly with experts, advocates, and legislators in the nation’s capital deepens the policy fellows’ understanding of how policy is made, and the trip as a cohort to Washington, D.C., builds a strong sense of camaraderie. By inviting not only the policy fellows, but also their mentors, supervisors, the peer consultant, and policy staff from the Hogg Foundation, the federal immersion experience offers many informal opportunities to deepen relationships between mental health and substance use policy advocates.

### Mentorship and Network Building

Ninety-seven percent of policy fellows reported that they found the program beneficial, and connecting the fellows with experienced policy professionals was shown to have a significant effect on the fellows’ satisfaction with the experience and added tremendous value to achieving program outcomes. “Over time I became friends with my mentor and we’re still colleagues,” a 2014 fellow said. “I can rely on her for career advice, for professional advice, for public policy advice, and vice versa.” Mentors come from

<sup>2</sup> For further details on the findings, see Bhandari, E. (2022). A retrospective on a decade of investment: Hogg Foundation for Mental Health Policy Academy & Policy Fellows Initiative. Hogg Foundation for Mental Health. <https://hogg.utexas.edu/wp-content/uploads/2022/03/Hogg-PPF-FINAL-edited.pdf>

all walks of life and share their expertise, lived experience, and passion for policy engagement with the policy fellows. Many mentors have asked to be involved again, showing that participation can be mutually beneficial.

Many alumni — 86% — mentioned that the program helped develop their professional network, and 89% reported that they remain involved in the fields of health policy, mental health, substance use, or other issues to which their fellowship exposed them. Among the organizations where alumni worked are the National Alliance on Mental Illness of Texas, the state’s Health and Human Services Commission, the Texas Harm

Reduction Alliance, the Texas Sunset Advisory Commission, Disability Rights Texas, the Texas Medical Association, RecoveryPeople, and the Texas Pediatric Society.

### Significant Advances on Key Issues

The work of the policy fellows contributes to mental health and substance use issues remaining high on Texas’s policy agenda. (See Sidebar.) Increased workforce capacity has generated significant advances in mental health funding for:

- peer support services, including increasing their Medicaid reimbursement rate to a level

### The Texas Peer and Recovery Services Unit

The Hogg Foundation seeks to elevate the voices of Texans living with mental health or substance use conditions and to ensure that they have opportunities to positively impact policymaking in Texas. The peer policy fellows have shown to be trailblazers in advancing meaningful change in legislation, rules, and practices affecting the health and well-being of Texans.

In 2019, three years after the launch of the Hogg Foundation’s peer policy fellows track, the Texas Health and Human Services Commission created a Peer and Recovery Services Programs, Planning, and Policy Unit that focuses on building the peer support workforce in the state. Two years earlier, the Texas Legislature voted to make peer support services an approved reimbursable benefit for Texas’s Medicaid recipients.

Mental health professional shortages in areas of Texas are only increasing and peer support services offer a less expensive and arguably more efficacious approach to supporting well-being and long-term recovery in communities. Interviews showed that many believe the foundation’s investment in the peer policy fellows was one of the driving forces for the development of the Office of Peer Support Services and the rule change for Medicaid reimbursement benefits. One stakeholder said that by sponsoring peer policy fellows, many legislative and agency staff were able to work alongside individuals with lived experience for the first time. Others mentioned that it was because the peer policy fellows showed that they not only brought unique and valuable knowledge to the policy process, but also that they were just as skilled as other policy specialists and just as needed as other health care professionals.

The creation of the Peer and Recovery Services Programs, Planning and Policy Unit and the approval of Medicaid reimbursement for peer services has visibly changed the behavioral health care system in Texas. Reflecting on the past decade, host organizations and mentors reported that the inclusion of those historically excluded from policy conversations brought increased attention to mental health and substance use issues. These examples of systemic and institutional change illustrate the power of the peer policy fellows and the positive outcomes of this initiative. The foundation’s long-term investment has given individuals with lived experience more representation in our government than ever before. Alumni have created new opportunities for those with lived experience to share their voices and play a role in shaping policies that create a more equitable future for Texas. As a 2022 academy coordinator-grant partner reported,

*Each of the peer policy fellows testified multiple times at legislative hearings this past session about the potential impact of various policy proposals on people with lived experience and the value of peer support in the recovery process. Their deeply personal experiences provided a very human dimension to policy decisions, and policymakers paid close attention to the compelling testimony.*

that reflects the value of the services provided and the integrity of the profession;

- mental health supports in the criminal and juvenile justice systems, and peer specialists who can help clients navigate the challenges of community reentry;
- access to quality health care for those struggling with substance use and nonpunitive approaches to reducing harmful consequences; and
- improving state hospitals and making them a hub of a continuum of care that can deliver evidence-based services available at the right time and place.

### Other Observations

*Funding shouldn't be tied to specific policy engagement.* As a funder of the initiative, program officers found that they should also communicate that funding is not determined by the host organization's alignment with the foundation's policy priorities or in the advancement of specific legislative goals. It is important that each policy fellow and host organization determine their own strategic direction and areas of focus independently.

*Clearly communicate roles.* Staff found that it was important that the policy fellows and grant partners understood their relationship to the foundation. For example, while policy fellows are encouraged to introduce themselves as policy fellow at their host organization, rather than a Hogg Foundation policy fellow, they could mention they are participating in the Hogg Foundation Policy Academy and Policy Fellow Initiative. Like many philanthropic organizations, the Hogg Foundation shares knowledge and expertise on policy issues related to mental health and substance use but does not engage in lobbying efforts. Ensuring that policy fellows' work is not seen as a direct extension of Hogg distinguishes the foundation's role as an issue-area specialist and educator from that of an advocate for specific legislation or policy change. One way that the foundation addressed this concern in the program design was to fund

95% of the fellow's salary, allowing the host organizations to allocate a portion of the policy fellows' time to lobbying efforts funded by a source other than the Hogg Foundation grant.

*The peer consultant's role goes beyond peer policy fellows.* The peer consultant makes the goal of inclusion a reality by ensuring thoughtful engagement in program activities by those with lived experience of mental health or substance use conditions. One of the biggest lessons learned by the peer consultant was that the role needed to support not just the peer policy fellows, but also — and perhaps even more so — the host organizations and the policy academy coordinators. For many of the host organizations, employing a peer policy fellow is a new experience and the peer consultant offers a resource for navigating the supervision of someone with lived experience, as well as how to best utilize them in policy engagement. For the peer policy fellows, mentoring from the peer consultant offers the knowledge that support is available if needed.

### Program Improvement

As a learning organization, the Hogg Foundation was also interested in understanding potential areas for program enhancement. Several recommendations surfaced during the retrospective evaluation process:

- Begin the federal immersion experience earlier, by hosting virtual information sessions in the months leading up to the trip or by sharing recommended reading with participants prior to their arrival.
- Explore ways to increase the number of peer policy fellowships available.
- Continue integrating those with lived experience in program activities and leadership roles.
- Invite peers to participate in the selection of grant partners.
- Create a similar policy academy and policy fellowship initiative focused on local or

regional policy engagement in addition to the current program's state-level focus.

- Retain virtual engagement options post-pandemic.
- Coordinate more alumni activities and opportunities for continued professional development and networking.

### Summary of Evaluation Findings

Overall, the Hogg Foundation for Mental Health Policy Academy and Policy Fellows Initiative has

- increased the number of individuals with the skills and expertise needed to advance mental health and substance use policy priorities;
- increased the number of organizations that have the capacity to successfully engage in mental health and substance use policy work;
- improved collaboration between nonprofit organizations, advocacy groups, and government institutions engaged in mental health and substance use policy;
- shown that the inclusion of those with lived experience amplifies the program's investment and has produced some of the initiative's most significant outcomes; and
- infused both monetary and social capital into the mental health and substance use policy workforce, creating both expansion and cohesion in the advocacy community in Texas.

*I never saw myself as someone that could make real change. To be quite frank, I felt underqualified for the program. But since participating in the policy fellows program, I've gained hope. In the midst of all the political pushback and lengthy processes, I met extraordinary advocates who are resilient, dedicated, knowledgeable, and compassionate about mental health. I know Texas has a long way to go, but there are brilliant people out there that are going to*

*Evidence shows that policy fellows have contributed to substantial achievements at their host organizations, initiating and completing projects that they otherwise would not have had resources to prioritize. Young professionals have launched careers and individuals with lived experience have had access to the knowledge and network that they need to succeed in policy engagement.*

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*continue fighting for a better future — and we have this program to thank.*

— Policy Fellow Alumnus, 2018

### Conclusion

Over the past decade of investment, the Hogg Foundation for Mental Health Policy Academy and Policy Fellow Initiative has significantly expanded the pool of knowledgeable and skilled advocates, increased organizational capacity for policy engagement, and strengthened relationships among stakeholders in the field.

Evidence shows that policy fellows have contributed to substantial achievements at their host organizations, initiating and completing projects that they otherwise would not have had resources to prioritize. Young professionals have launched careers and individuals with lived experience have had access to the knowledge and network that they need to succeed in policy engagement. As a result of the peer policy fellows, consumers of mental health

services have more opportunities than ever before to shape the systems that impact their lives. Texas's behavioral health care system has changed and now includes more access to peer support services than ever before. In addition, numerous policy fellow alumni now occupy key leadership positions throughout nonprofit organizations in Texas.

With these findings in mind, the Hogg Foundation for Mental Health Policy Academy and Policy Fellows Initiative has shown that it has succeeded in making a substantial difference in the mental health and substance use policy landscape in Texas.

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