SUSTAINING AND SPREADING MEDI-CAL TRANSFORMATION: A TOOLKIT FOR COMMUNITY INTEGRATORS

DHCS
CALIFORNIA DEPARTMENT OF
HEALTH CARE SERVICES

Acknowledgement and Disclaimer

This toolkit was developed collaboratively between 2025 and 2026 through the California Providing Access and Transforming Health (PATH) Collaborative Planning and Implementation (CPI) initiative in partnership with the California Department of Health Care Services (DHCS), Public Consulting Group (PCG), and PATH CPI facilitators.

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This resource is intended for informational and technical assistance purposes only and reflects guidance and best practices available at the time of publication. Program requirements, policies, and Medi-Cal transformation initiatives may change over time.

For the most current and official information related to Medi-Cal transformation, PATH, and DHCS guidance, please refer to the DHCS website: https://www.dhcs.ca.gov/.

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Toolkit Overview

Sustaining and Spreading Medi-Cal Transformation: A Toolkit for Community Integrators is designed to be a practical, flexible resource for communities, cross-sector partners, and regional coalitions as they pursue the long-term sustainability of Enhanced Care Management (ECM) and Community Supports services. It offers practical tools, frameworks, and other resources to help leaders strengthen collaborative systems, secure resources, and ensure continuity of care across programs.

Designed for "community integrators"—leaders or coalitions working at the community or regional level to improve local infrastructure and coordination systems for ECM and Community Supports—this toolkit is relevant to individuals from contracted provider organizations, county agencies, managed care plan (MCP) representatives, community partners, and others involved in Medi-Cal implementation.

By focusing on sustainability at the community level, this toolkit—which covers governance, financing, workforce and outcomes—equips coalitions and cross-sector partnerships (both formal and loose) to preserve and grow the infrastructure needed to deliver lasting impact for Medi-Cal members. For more information on the toolkit's background, please reference the Appendix.

The toolkit is meant to support people working across organizations, fostering cross-sector collaboration and coordination for Medi-Cal transformation—including and beyond CalAIM implementation. For those working within organizations, we recommend exploring **Sustaining and Spreading Medi-Cal Transformation: A Toolkit for Providers.** This resource can be found in the **DHCS PATH On-Demand Resource Library**.

How to Use the Toolkit

This toolkit is a working guide to support cross-sector reflection, planning, problem-solving, and action over time and can be used in several ways:

- As **a shared planning resource** to help partners align around what it will take to sustain ECM, Community Supports, and related coordination infrastructure
- As **a discussion guide** for coalitions, collaboratives, MCP/provider/community partner meetings, regional planning groups, and sustainability workgroups
- As **an action-planning resource** to help partners identify priorities, clarify roles, and move from discussion to implementation

» As **a living resource** to revisit periodically as programs mature, contracts change, policy and funding conditions shift, community needs evolve, and Medi-Cal transformation continues

Assemble Your Coalition for Discussion and Action Planning	Begin by identifying the people and organizations that need to be part of the conversation. The right participants may vary depending on the sustainability component you are discussing. For example, conversations about funding may require MCP, county, finance, and executive leadership participation. Conversations about referrals, care coordination, or member experience may require frontline providers, care managers, navigators, community partners, and people with lived experience. Before selecting tools, take time to clarify what partners are trying to sustain, grow, adapt, or spread. Community-level sustainability may include maintaining existing services, expanding access to ECM or Community Supports, strengthening referral pathways, improving shared workflows, sustaining collaborative infrastructure, building data-sharing capacity, or aligning funding and policy priorities across partners.
Identify Priorities for Your Sustainability Efforts Through Reflection and Assessment Tools (Optional)	Community integrators may choose to begin with the **Community Sustainability Discussion Guide.** This optional tool prompts shared reflection on a region's infrastructure and coordination systems, helping partners identify gaps, highlight effective practices, and focus sustainability efforts. We recommend completing the guide with a broad set of current partners, such as contracted providers; hubs or nodes, meaning organizations that help coordinate referrals, services, information, and/or shared infrastructure across multiple partners; county representatives; MCPs; community partners; and others engaged in Medi-Cal implementation. The goal is not to complete a perfect assessment but to build a shared understanding of where the community is strong, where greater alignment is needed, and where focused action could have the greatest impact.
Explore and Use the Toolkit	Once your team has identified its priorities, refer to the Components of Sustainability below to select the resources that are most relevant to your region's current stage, capacity, and goals. Return to this toolkit periodically as services mature, funding changes, policy conditions shift, contracts evolve, staffing and infrastructure needs transform, and community priorities emerge.

Components of Sustainability

This toolkit is organized into sections corresponding to four key components of sustainability, described on the following pages:

- Resources and Motivation for Change
- Programs, Services, and Coordination
- Leadership, Workforce, and Relationships
- The Broader Environment That Impacts the Work

Each section offers practical tools and guidance to help community integrators strengthen a different part of their work sustaining ECM and Community Support services long-term. Click on the links below to go directly to that section of the toolkit.



Resources and Motivation for Change

This section of the toolkit focuses on building, supporting, and using the resources needed to sustain services among organizations in a community or region. These resources include both people-centered resources—such as joy, purpose, hope, commitment, and energy—and material resources, such as funding, supplies, training, opportunities, and shared or in-kind support.

Specific resources include guidance on the following:

- Setting strategy for building people-centered resources
- Building a long-term funding strategy at the community level

Programs, Services, and Coordination

This section of the toolkit focuses on how communities and regions make improvements, including mapping and connecting programs across the local system, improve coordination between organizations, and spreading and scaling the outcomes these programs and organizations are working to achieve.

Specific resources include guidance on the following:

- Mapping programs, providers, and services in a region
- Partnering and contracting between health care and community partners
- Spreading and scaling outcomes of programs
- Improving processes over time

Leadership, Workforce, and Relationships

This section of the toolkit focuses on supporting partnerships among people—the leadership, workforce, and relationships across the community needed to start, strengthen, and sustain the work over time—to ensure continuity for everyone engaged in delivering Medi-Cal services.

Specific resources include guidance on the following:

- Mapping community stakeholders and assets to drive collaboration
- Engaging stakeholders and the community
- Leading change at a community level
- Instilling equity capabilities at a community level, including the knowledge, skills, practices, and structures partners need to identify and address inequities, share power, center community voice and lived experience, and design more equitable services and systems

The Broader Environment That Impacts the Work

This section of the toolkit focuses on understanding the broader environment in which the work takes place, including the political, policy, technology, data, innovation, financial, economic, physical, social, and cultural factors that can influence growth and sustainability.

Specific resources include guidance on the following:

- Participating in community-wide data exchange
- Understanding federal and state budgets
- Understanding the economic environment
- Tracking executive policies and mobilizing for change

Resources and Motivation for Change

Setting Strategy for Building People-Centered Resources		
Resource/Tool Name	**Description**	**Use this resource if you are...**
IHI Psychology of Change Framework to Advance and Sustain Improvement *White paper from the Institute for Healthcare Improvement (IHI)*	The *IHI Psychology of Change Framework* focuses on the **human side of improvement**—how to activate people's **agency** (their ability to act with purpose and courage). It introduces five core domains: 1. Unleash intrinsic motivation 2. Co-design people-driven change 3. Co-produce in authentic relationship 4. Distribute power 5. Adapt in action	Leading change that requires culture and behavior shifts while addressing resistance, burnout, and engagement to co-create and sustain improvements.
Public Narrative Participant Guide *Guide from Harvard University*	A comprehensive guide that contains **an overview of what public narrative is and why it is important; worksheets and activities that help you craft a Story of Self, Story of Us, and Story of Now**; and worksheets and activities to provide feedback on others' stories	Preparing teams to use concise, values-driven storytelling to motivate stakeholders and create credible calls to action tied to shared purpose.

Building a Long-Term Funding Strategy at the Community Level		
Resource/Tool Name	**Description**	**Use this resource if you are...**
Beyond the Grant: A Sustainable Financing Workbook *Workbook from ReThink Health*	A practical workbook to help multisector partnerships and organizations **move beyond reliance on short-term grants and build sustainable financing for health system transformation**. Organized into seven modules, it covers the following: » Moving money across sectors and organizations » Understanding systems and financial flows » Exploring financing structures » Estimating costs and developing financial plans » Articulating and demonstrating value » Charging for services » Identifying integrative activities that could generate revenue	Leading a multisector partnership and seeking sustainable financing strategies or tools to map financial flows, estimate costs, and demonstrate value.
Structures for Financing Population Health *Handout from ReThink Health*	A compact reference chart of **financing structures for population health**, with columns for description, examples/mechanisms, most-suitable applications, decision process, government level, supply influences, importance, and key challenges. It covers a variety of financing structures, including seed funding, debt and working capital, and sustainable financing.	Building sustainability and financing strategies for complex or population health initiatives by selecting funding models aligned to risk, ROI, and time horizon, and preparing briefs on options and trade-offs for finance, payer, or public partners.
Braiding and Blending Funds to Support Community Health Improvement: A Compendium of Resources and Examples *Resource library by Trust for America's Health*	A compendium of guides, tools, federal initiatives, and state/local examples demonstrating **how to braid (coordinate) or blend (combine) funding streams** to support community health improvement. Includes definitions, practical frameworks, and real-world applications across health, housing, education, and social services.	Designing cross-sector initiatives and exploring sustainable financing models beyond single grants using case studies and federal/state precedents to inform local practice and policy advocacy.



Programs, Services, and Coordination

Mapping Programs, Providers, and Services in a Region		
Resource/Tool Name	**Description**	**Use this resource if you are…**
Example Provider Directory *From the Health Improvement Partnership (HIP) of Santa Cruz County* *Additional Resources on Provider Directories are included in the Provider Network Awareness Best Practice Toolkit.*	A simple **Excel template that can be filled out to represent every ECM and Community Supports provider in a region**. Each provider has additional information such as collaborative registration status, MCP, whether they are accepting new clients, key contacts, which populations of focus they serve, and/or which services they provide.	Mapping ECM and Community Supports providers and creating shared tools to streamline referrals and ensure stakeholders have accurate information on services, coverage, and contacts.
Community Asset Map Template *Template from the Camden Coalition*	A template designed to **identify community resources and associated key contacts to assist with specific areas of need for your population.** The map enables groups to build relationships with community partners and resources across sectors in key areas such as education and employment, medication and equipment, legal assistance, mental health, housing, health management, benefits and entitlements, advocacy and activism, identification support, peer support, substance use support, food and nutrition, and reproductive health.	Assessing community resources and building partnerships to connect individuals with services that address unmet health-related social needs beyond traditional health care.

System of Care Asset Map Guide *From HC2 Strategies* *Additional resources on System of Care Asset Mapping are included in the Provider Network Awareness Best Practice Toolkit.*	A step-by-step guide and associated tools to **describe the system serving a particular population, including the programs, care delivery, built infrastructure, and other community assets**; consider partners in delivery to meet a client's needs; and close service gaps in a community. The guide offers guidance for building a system of care asset map as well as tools and templates for creating a map for three sample populations: those experiencing homelessness, older adults experiencing homelessness, and those receiving hospice/palliative care.	Training staff to identify community partners and evaluate service systems to strengthen gaps and support proactive, coordinated care.

Partnering and Contracting Between Health Care and Community Partners		
Resource/Tool Name	**Description**	**Use this resource if you are...**
Contracting to Align Health and Social Care Ecosystems: A Toolkit Sharing Leading Practices *Online toolkit from the Partnership to Align Social Care*	Toolkit that shares **leading contracting practices to strengthen partnerships between health care organizations and community-based organizations (CBOs)**. It addresses essential contracting elements and features lessons from the field.	Building cross-sector partnerships with CBOs and community care hubs to align health and social care, operationalize agreements, and sustain services addressing health-related social needs.

Spreading and Scaling Outcomes of Programs		
Resource/Tool Name	**Description**	**Use this resource if you are…**
A Framework for Spread: From Local Improvements to System-wide Change *White paper from IHI*	A practical framework that outlines how organizations can **spread successful local innovations across systems** to close the gap between best practice and common practice. It synthesizes lessons from health care and other industries and includes case studies. Core components include: » Preparing for spread » Establishing a clear aim » Developing, executing, and refining a spread plan	Scaling proven practices across sites or units using structured spread strategies that include communication, measurement, and sustainability planning.
Planning for Scale: A Guide for Designing Large-Scale Improvement Initiatives *White paper from IHI*	This guide supports leaders preparing to **take proven practices from small pilots to widespread use across health care systems, regions, or nations.** It provides a structured set of questions for stakeholders to consider, covering motivations, foundations, aims, interventions, social systems, and methods for spreading change.	Expanding successful pilots and coordinating multi-organization improvement efforts using frameworks to guide planning conversations before scaling.

Improving Processes Over Time		
Resource/Tool Name	**Description**	**Use this resource if you are...**
Quality Improvement (QI) Essentials Toolkit *Toolkit with worksheets from IHI*	A toolkit that includes the **tools and templates needed to launch and manage a successful improvement project.** Each of the 10 tools in the toolkit includes a short description, instructions, an example, and a blank template. The toolkit covers the following topics: » Analyzing the root cause of a problem » Understanding your system » Identifying potential risks and their impact » Monitoring performance over time » Testing changes	Leading or participating in quality improvement using structured tools and templates to analyze problems, design interventions, and measure progress.



Leadership, Workforce, and Relationships

Mapping Community Stakeholders and Assets to Drive Collaboration		
Resource/Tool Name	**Description**	**Use this resource if you are…**
Identifying, Mapping, and Mobilizing Our Assets *Guide from the University of Wisconsin*	A practical guide and worksheets for **asset-based community development**. Supports organizations in recognizing and mobilizing the untapped strengths of various stakeholders. Tools include: » Worksheets for mapping assets of specific groups » Planning guides for associations, organizations/institutions, local businesses, and economic activity » Methods to map environmental and physical assets » Prompts to link identified assets to program goals and opportunities	Inventorying and mobilizing community assets by using structured tools to map local skills, networks, and resources and connect them to organizational goals.
Stakeholder Analysis Worksheet *Worksheet from the Camden Coalition*	This worksheet helps to systematically **analyze and map stakeholders,** rating their interest, commitment, motivation, and potential unique impact. It also provides the opportunity to note the purpose of the relationship and any anticipated barriers to engagement.	Planning or scaling programs by prioritizing stakeholder engagement and preparing for strategic planning, partnerships, and communications.

Engaging Stakeholders and the Community		
Resource/Tool Name	**Description**	**Use this resource if you are...**
The Community Engagement Guide for Sustainable Communities *White paper from PolicyLink and the Kirwan Institute*	Step-by-step guide to building **authentic community engagement** grounded in principles of equity, transparency, reciprocity, and trust. Defines levels of engagement and provides tools for outreach, recruitment, facilitation, and feedback. Includes strategies for addressing power dynamics, cultural context, and sustainability.	Planning programs, policies, or evaluations with community partners, moving from outreach to co-creation and shared decision-making with equitable engagement of underrepresented groups.

Leading Change at the Community Level		
Resource/Tool Name	**Description**	**Use this resource if you are...**
Stewarding Regional Health Transformation: A Guide for Changemakers *White paper from ReThink Health*	A comprehensive guide for leaders and multi-sector collaboratives to steward regional health system transformation. It outlines the **Pathway for Transforming Regional Health** (Campaign, Engage, Align, Redesign, Integrate) and provides tools, case studies, and strategies for building stewardship structures that drive better health, lower costs, improved equity, and long-term system sustainability.	Leading or supporting regional, multi-sector health transformation collaborations by building stewardship teams; shifting from short-term campaigns to long-term system redesign; and using tools to guide strategy, financing, and progress.
10 Essential Practices for Transforming Health and Well-being Through Regional Stewardship *Tool from ReThink Health*	A framework of **10 essential practices** for regional stewards to advance health and well-being through cross-sector collaboration. Organized into three areas—**Broad Stewardship, Sound Strategy, and Sustainable Financing**—all anchored in a shared vision. Each practice area includes an overview, discussion starters, and tangible tools.	Leading or participating in regional health transformation efforts by strengthening stewardship, strategy, and financing across cross-sector partnerships with shared vision and governance while balancing urgent needs with long-term well-being.
Powering Change: Building Healthy, Equitable Communities Together *Online curriculum and resources from the Population Health Innovation Lab*	A comprehensive curriculum to **help multisector collaboratives establish and strengthen sustainable operations,** including governance, equity, partnerships, communication, financial sustainability, data sharing, and collective accountability.	Serving as a convener, hub, backbone organization, or community integrator and need a deeper curriculum to support collaborative leadership and cross-sector sustainability.

Instilling Equity Capabilities at a Community Level		
Resource/Tool Name	**Description**	**Use this resource if you are...**
Equity in Multisector Collaboration Toolkit *Toolkit from Blue Shield of California Foundation*	An **assessment of equity** in community outcomes, organizational practices, and individual behaviors, along with group **discussion tools to interpret results and set actionable goals.**	Participating in cross-sector partnerships as a program manager, care coordinator, or backbone organization lead, with a focus on centering equity and elevating community voices in care coordination.



The Broader Environment That Impacts the Work

Participating in Community-Wide Data Exchange		
Resource/Tool Name	**Description**	**Use this resource if you are...**
How to Share Data: Practical Guide for Health and Homeless Systems of Care *White paper from the California Health Care Foundation*	A **step-by-step guide for health and homeless service systems to share data effectively and responsibly**, including: » Why data sharing matters » Common challenges » Practical strategies for building governance, trust, and consent processes » Lessons from Alameda County and 211 San Diego on agreements, workflows, and technology choices	Leading or supporting cross-sector health, housing, or homelessness initiatives by developing data-sharing agreements and consent processes, informed by real-world examples and implementation lessons.
Data Exchange Framework Implementation Toolkit *Toolkit from the Data Exchange Framework and California Health and Human Services*	A **step-by-step guide for California health and social service organizations to implement the Data Exchange Framework (DxF)**, including: » What the DxF is and why it matters » Who must sign the Data Sharing Agreement and when » Which organizational changes are required » Role of intermediaries like Qualified Health Information Organizations » How to enter choices in the Participant Directory and begin exchanging data	California health care or social service leaders responsible for ensuring DxF compliance, aligning policies, training staff, implementing secure data exchange, and understanding compliance timelines.

Understanding Federal and State Budgets		
Resource/Tool Name	**Description**	**Use this resource if you are…**
Deep Dive: California Budget Process *Presentation slides from Chapman Consulting*	An **overview of California's annual budget cycle**, with concrete dates for each milestone and a description of what that milestone entails.	Working in health, housing, or social services aligned with California budget timelines, using key decision points to guide advocacy, planning, and funding strategy.
California State Budget Process One-Pager *Overview from the HIP of Santa Cruz County*	A **concise overview of California's annual state budget process**, including the fiscal year timeline, major fund types, key decision-makers, budget milestones, and opportunities for community members and advocates to engage. The one-pager helps provider organizations understand how state budget decisions are made and when to communicate about the local impact of Medi-Cal, ECM, Community Supports, and related community health investments.	Trying to understand the state policy and funding environment that affects ECM, Community Supports, CalAIM, or related services; preparing to communicate with legislators, state agencies, or advocates; or looking for key timing and messaging opportunities to connect provider experience, member stories, and local service needs to state budget decisions.
Federal Budget Overview & Impacts of H.R. 1 *Presentation slides from BluePath Health*	**Primer on Medicaid** work requirements, eligibility restrictions, provider tax changes, and cuts to state-directed payments.	Updating eligibility, financial models, and contracts in response to policy changes while planning for Medi-Cal disruptions and adapting outreach strategies.

Understanding the Economic Environment

Resource/Tool Name	Description	Use this resource if you are...
Building Stronger Communities: Understanding the Power of Community Economic Development *White paper from ResearchFDI*	A conceptual overview of **Community Economic Development (CED)** that emphasizes local empowerment, equitable growth, and sustainable development. Describes five guiding principles of CED and recommends strategies for professionals looking to implement in their own communities.	Introducing community-led economic development principles to align programs with equity, inclusion, and sustainability while framing strategies around community control, local investment, and resilience.

Tracking Executive Policies and Mobilizing for Change

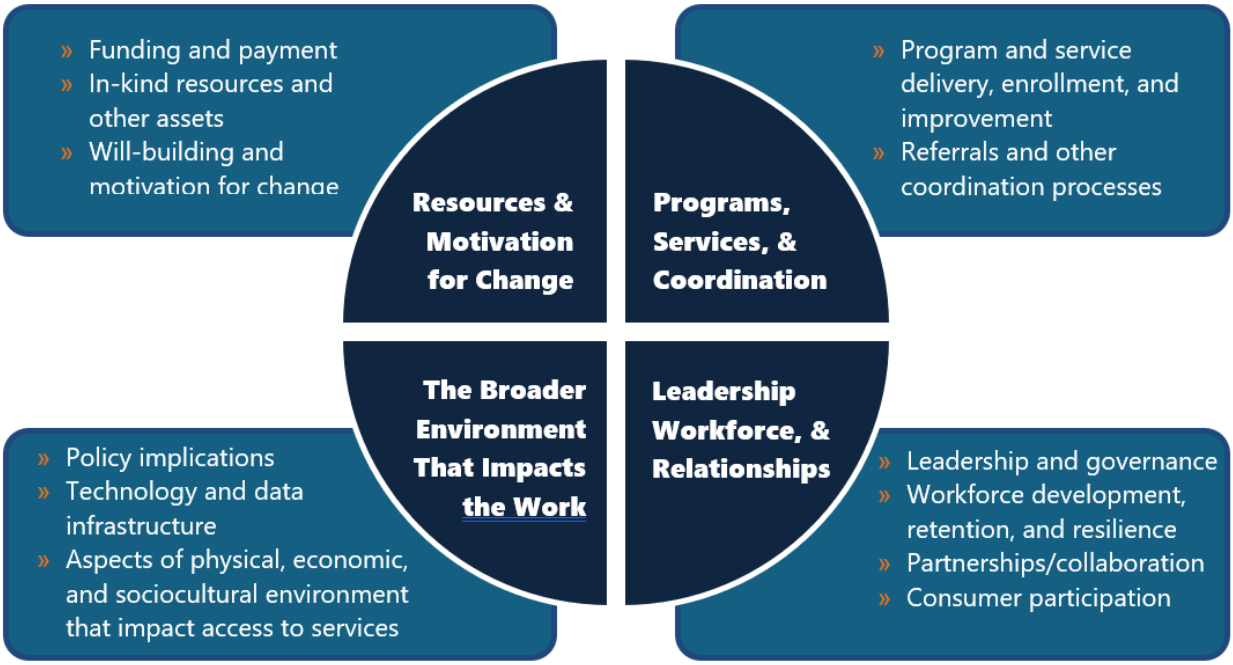
Resource/Tool Name	Description	Use this resource if you are...
Health Equity Policy Hub *Online tool from HealthBegins*	An online hub that **tracks executive branch policies affecting health equity** and helps communities respond. Offerings include the following: » A **Policy Tracker** that provides real-time updates and translates what the policy means for your organization » A **Mobilization Network** that equips organizations with the training, tips, and network to help advance health equity using your spheres of influence	Monitoring policy changes impacting health equity and justice or coordinating advocacy, community action, and stakeholder collaboration.

Appendix

Background

This toolkit was developed in alignment with CalAIM, California's statewide effort to improve whole-person care by integrating physical health, behavioral health, and social services. It also aligns with PATH, a State initiative providing funding, technical assistance, and infrastructure support to help advance Medi-Cal delivery system transformation between 2022 and 2026. The toolkit was further informed by the CPI initiative, which strengthened cross-sector coordination and implementation readiness.

The toolkit was designed with support from implementation partners, facilitators, and technical assistance teams. It is organized around four components of sustainability, shown in the graphic below. These were adapted from the four domains of the Generative Sustainability Framework[1], conceptualized by the 100 Million Healthier Lives initiative, and through the PATH CPI initiative.



[1] Stout S, Anderson J, Brooks K, Munene E, Knox P and Schall M. Leading for Abundance: Approach to Generative Sustainability. SCALE 1.0 Synthesis Reports. Cambridge, Massachusetts: Institute for Healthcare Improvement, 2017.

The toolkit was specifically created to advance the sustainability of PATH investments by offering practical guidance, tools, and approaches that support the long-term implementation, operational stability, and integration of new care-delivery models into existing systems. Its development was grounded in statewide efforts to translate CalAIM goals into durable, scalable infrastructure and practice supports, ensuring that PATH-funded activities can be sustained and adapted beyond initial implementation periods.

Appreciation is extended to all contributors who supported its development and refinement, including PCG, CPI facilitators, and stakeholders. Their insights shaped its design, usability, and real-world application.