SUSTAINING AND SPREADING MEDI-CAL TRANSFORMATION: A TOOLKIT FOR PROVIDERS

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/.

Contents

Toolkit Overview 4

How to Use the Toolkit 4

Components of Sustainability 6

Resources and Motivation for Change 9

Building and Supporting the People, Relationships, and Culture Needed to Sustain the Work 9

Developing and Communicating a Clear Organizational Vision 10

Supporting Organizational and Budget Planning 11

Building a Long-Term Funding and Sustainability Strategy 12

Programs, Services, and Coordination 14

Developing Organizational Strategies for Programs, Processes, and Desired Outcomes 14

Planning and Strengthening Specific Services and Initiatives 16

Supporting Programmatic Financial and Business Planning 18

Improving Processes Over Time 19

Leadership, Workforce, and Relationships 20

Building Strategies that Support Workforce Well-Being 20

Strengthening Workforce Engagement and Professional Development 21

Establishing and Deepening Relationships, Including with People with Lived Experience 21

The Broader Environment That Impacts the Work 22

Supporting Community-Wide Data Sharing and Coordination 22

Understanding the Policy Landscape and Communicate with Policymakers 23

Monitoring Policy Changes and Organizing for Action 24

Strengthening Engagement by Understanding Community, Social, and Cultural Needs 24

Appendix 25

Background 25

Toolkit Overview

Sustaining and Spreading Medi-Cal Transformation: A Toolkit for Providers is designed to be a practical, flexible resource for provider organizations delivering Enhanced Care Management (ECM) and Community Supports as they plan for long-term maintenance, growth, adaptation, and sustainability. It offers practical tools, templates, and other resources to strengthen funding and resource planning, support leadership and workforce well-being, stabilize and grow programs and services, and sustain outcomes.

By focusing on sustainability, this toolkit helps providers continue delivering effective, coordinated, person-centered, and equitable Medi-Cal services and make a lasting impact in their communities beyond the early phases of California Advancing and Innovating Medi-Cal (CalAIM) implementation. Many of the tools may also be relevant to organizations who refer into the Medi-Cal ecosystem, such as county agencies, hospitals, and other community partners. For more information on the toolkit's background, please reference the Appendix.

The toolkit is meant to support people working within organizations delivering services. For individuals working across organizations or fostering cross-sector collaboration and coordination infrastructure for Medi-Cal transformation, including and beyond CalAIM implementation, we recommend exploring **Sustaining and Spreading Medi-Cal Transformation: A Toolkit for Community Integrators.** 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 team reflection, planning, problem-solving, and action over time and can be used in several ways:

- As **a team reflection tool** to assess what is working well, where there are risks to sustainability, and what needs focused attention
- As **a planning resource** to support organizational strategy, staffing, workflows, financing, partnerships, and quality improvement
- As **a facilitation guide** for leadership meetings, program team discussions, sustainability planning sessions, and cross-functional retreats
- As **a living resource** to revisit periodically as programs mature, funding changes, staffing shifts, community needs evolve, and new Medi-Cal guidance emerges

Assemble Your Team for Discussion and Action Planning	Begin by identifying the people across your organization who should be part of sustainability planning. Consider including people who understand program operations, client/member experience, contracting, billing, finance, staffing, partnerships, data, and leadership priorities. Before selecting tools, take time as a team to discuss what sustainability means for your organization. This may include maintaining current services, growing to serve more members, adapting services to better meet community needs, spreading successful practices to other programs or geographies, or strengthening the infrastructure needed to continue the work over time.
Identify Priorities for Your Sustainability Efforts Through Reflection and Assessment Tools (Optional)	To support your planning efforts, we recommend completing these optional tools as a team and engaging at least one person with frontline experience and one person with business, finance, administrative, or leadership oversight. The goal is to spark honest discussion about your organization's strengths in terms of sustainability planning, where there are gaps, and where focused action may be needed. » **The Provider Organization Sustainability Reflection and Discussion Guide** helps teams reflect on their current systems, processes, infrastructure, relationships, and readiness to sustain ECM and Community Supports over time. » **The Program Sustainability Assessment Tool (PSAT)** from the Center for Public Health Systems Science (CPHSS) helps organizations understand a program's capacity to be maintained over time. The online assessment includes questions across eight domains of program sustainability and provides an automated results summary.
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 organization's current needs, capacity, and goals. Return to this toolkit periodically as programs mature, contracts change, staffing and infrastructure needs shift, community priorities evolve, and Medi-Cal transformation continues.

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 provider organizations 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 programs and service delivery. 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:

- Building and supporting the people, relationships, and culture needed to sustain the work
- Developing and communicating a clear organizational vision
- Supporting organizational and budget planning
- Building a long-term funding and sustainability strategy

Programs, Services, and Coordination

This section of the toolkit focuses on sustaining and improving programs, services, and ways of working over time, including adapting to changing needs and strengthening outcomes.

Specific resources include guidance on the following:

- Developing organizational strategies for programs, processes, and desired outcomes
- Planning and strengthening specific services and initiatives
- Supporting programmatic financial and business planning
- Improving processes

Leadership, Workforce, and Relationships

This section of the toolkit focuses on supporting the people, leadership, workforce, and relationships necessary to start, strengthen, and sustain the work over time. This includes individuals who deliver Medi-Cal services.

Specific resources include guidance on the following:

- Building strategies that support workforce well-being
- Strengthening workforce engagement and professional development
- Establishing and deepening relationships, including with people with lived experience

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:

- Supporting community-wide data sharing and coordination
- Understanding the policy landscape and communicating with policymakers
- Monitoring policy changes and organizing for action
- Strengthening engagement by understanding community, social, and cultural needs

Resources and Motivation for Change

Building and Supporting the People, Relationships, and Culture Needed to Sustain the Work		
Resource/Tool Name	**Description**	**Use this resource if you are...**
IHI Psychology of Change Framework » Psychology of Change Framework to Advance and Sustain Improvement » Psychology of Change Framework Slides *White paper and presentation slides 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. Unleashing intrinsic motivation 2. Co-designing people-driven change 3. Co-producing in authentic relationship 4. Distributing power 5. Adapting in action The *IHI Psychology of Change Framework Slide Deck* is a **visual, condensed version** of the white paper. It includes key graphics, definitions, and practical tips for applying the framework in real-world settings.	Leading change that requires culture and behavior shifts, addressing resistance and engagement challenges, and co-creating sustainable improvements.

Developing and Communicating a Clear Organizational Vision		
Resource/Tool Name	**Description**	**Use this resource if you are...**
Crafting a Vision Statement *Handout from the Camden Coalition*	A handout that provides a **step-by-step guide to writing a vision statement that is clear, inspiring, and specific to your organization**. It expands on the following: » Why vision statements matter as the anchor of strategy » Common pitfalls » A five-step process for developing your vision	Developing or revising a strategic plan and seeking a clear, unifying purpose statement to sharpen goals and guide group discussion with staff and stakeholders.
Story Banking Playbook *Playbook from Chapman Consulting*	A facilitation playbook that helps ECM and Community Supports providers **capture, refine, and use short, de-identified stories to communicate the human impact and value of their work.** The playbook includes story prompts, mock impact statement activities, peer review guidance, and tips for using plain language while avoiding protected health information.	Trying to communicate the value of ECM or Community Supports to Managed Care Providers (MCPs), counties, funders, community partners, staff, or policymakers; preparing outreach or partnership materials; or looking for a structured way to pair data with member-centered stories of impact.

Supporting Organizational and Budget Planning		
Resource/Tool Name	**Description**	**Use this resource if you are...**
Building the Value Case for Complex Care *Online toolkit from the Camden Coalition*	A toolkit to help **align mission and margin for complex care** by guiding leaders through making a compelling value case. It includes the following: » Tools for mapping populations, performing root-cause analyses, and scaffolding interventions » Guidance on collaborating with finance teams, selecting metrics, and calculating return on investment (ROI) » Worksheets on stakeholder analysis, budget planning, and pitch decks » Strategies for sharing results and sustaining funding in diverse settings	Leading or designing complex care programs and securing sustainable funding by demonstrating value across outcomes, equity, and cross-sector impact to finance and payer stakeholders and leadership.
CalAIM Budget Estimator Tool *Online budgeting tool from the Camden Coalition*	An **Excel-based budgeting template** designed for community-based organizations (CBOs) exploring Medi-Cal contracts. Users can input assumptions, test built-in revenue ranges, and project program margins across years.	Considering Medi-Cal contracting and evaluating financial feasibility, including whether projected revenue covers costs, to support budget planning and negotiations with decision-makers on service expansion.

Building a Long-Term Funding and Sustainability Strategy		
Resource/Tool Name	**Description**	**Use this resource if you are...**
Balancing Funding and Implementation Mapping *Worksheet from HC2 Strategies and IHI*	A structured worksheet to help organizations **map funding sources against program needs.** Guides users through a set of six reflective questions and provides two tables to capture thoughts.	Leaders, managers, or finance partners aligning funding with program delivery and preparing for budgeting, sustainability, or grant discussions by identifying inefficiencies, overlaps, and infrastructure gaps.
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 such as 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 Medicaid Funds to Support Person-Centered Care: Lessons from Medi-Cal *Brief from the Center for Health Care Strategies*	A brief that examines how health care and social service organizations in California are **braiding multiple funding streams**, including Medi-Cal and non-Medi-Cal sources. It includes the following: » Key terms and definitions (e.g., braiding, blending, supplantation, sequencing) » Four distinct approaches to braiding » Risk-mitigation strategies » Strategies for managed care plans to reduce administrative burdens » In-depth profiles of three organizations that have implemented braiding	Integrating health and social care funding by exploring compliant models that combine Medi-Cal and non-Medi-Cal resources to better meet client needs.

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 and tools to map financial flows, estimate costs, and demonstrate value.

Programs, Services, and Coordination

Developing Organizational Strategies for Programs, Processes, and Desired Outcomes		
Resource/Tool Name	**Description**	**Use this resource if you are…**
Sample Readiness Roadmap for ECM and Community Supports Providers *Roadmap and associated online resources from the Population Health Innovation Lab (PHIL)*	An interactive roadmap for organizations navigating the implementation of new Medi-Cal benefits with a managed care plan. The resource was developed with guidance from local partners, on-the-ground providers, and MCPs. The roadmap includes tools and solutions to support organizations as they build readiness for ECM and Community Supports implementation and sustain service delivery.	Preparing to contract for, launch, strengthen, or sustain ECM and Community Supports services; trying to understand the operational steps involved in working with a managed care plan; or looking for practical guidance, tools, and examples to support organizational readiness.
A Health Equity Guide for Healthcare Transformation and Accountability *White paper from HealthBegins, Health Leads, Human Impact Partners, JSI, and Social Interventions Research and Evaluation Network (SIREN), UCSF*	A practical white paper that offers **an overarching framework for health care institutions pursuing health and racial equity**. It proposes a process and approach for organizing action and ongoing improvements, as well as ideas about strategic goals and sample practices organizations might adopt.	Advancing health and racial equity by transforming practices across patient, organizational, community, and societal levels using a framework for embedding accountability into strategy.

Goal Setting and Strategy Tool *Worksheet from the Camden Coalition*	A worksheet with prompting questions to support teams in thinking through **internal and external factors that influence their work's success.**	Facilitating strategic planning or project design to align teams on problems, solutions, strengths, opportunities, and community partners.
Logic Model Worksheet *Worksheet from the Camden Coalition*	A visual roadmap that shows **the cause-and-effect relationships between a project's resources (inputs), the actions taken (activities), and the intended changes or results (outcomes)**. This worksheet contains a logic model template, an example, and instructions for completion.	Ensuring alignment between resources, activities, and outcomes by testing assumptions and building shared understanding of program goals across stakeholders.

Planning and Strengthening Specific Services and Initiatives		
Resource/Tool Name	**Description**	**Use this resource if you are…**
ECM and Community Supports Implementation Map *Worksheet from HC2 Strategies*	A worksheet that helps provider organizations **identify a compelling elevator pitch and population(s) served for ECM and Community Support offerings**, as well as the key partners, activities, and resources needed to deliver on their "pitch."	Defining ECM and Community Supports goals, populations served, and the activities, partnerships, and resources needed for effective delivery.
Enhanced Care Management Care Plan Template *Template from the Health Improvement Partnership (HIP) of Santa Cruz County*	A structured **ECM care plan template** that supports the documentation of member information, acuity level, frequency of contact, estimated length of services, social determinants of health (SDOH) diagnosis or eligibility, medical necessity, functional impact, client strengths, identified needs, client-stated goals and preferences, SMART goals, interventions, and care plan updates.	Standardizing ECM care planning across staff, strengthening documentation of medical necessity and member goals, supporting supervision and quality review, or creating a clearer link between member needs, interventions, and progress over time.
Asset and network mapping presentations » Why Asset and Network Map? » How Asset and Network Mapping Can Drive Strategy *Video presentations from PHIL*	Two video presentations that introduce **the purpose and use of asset and network mapping**, including how to identify community assets, referral networks, influence patterns, resource flows, and strategic opportunities. One session includes a CalAIM example from Mendocino County's ECM and Community Supports ecosystem.	Trying to better understand your local partner network, strengthen referrals, identify gaps in services, or use relationship and asset mapping to inform strategy.

Community Map Template *Template from the Camden Coalition*	A template designed to **identify community resources and associated key contacts** to assist with specific populations' areas of need. The map helps groups to build relationships with community partners and access resources across sectors in key areas like education and employment, medication and equipment, legal assistance, mental health, housing, health management, benefits and entitlements, advocacy and activism, identification (ID) 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 that go beyond traditional health care.
Sample ECM disenrollment and graduation forms » For Adults » For Children & Youth *Worksheets from the HIP of Santa Cruz County*	Sample ECM forms for **documenting member graduation, transition to a lower level of care, disenrollment, or continuation/reauthorization**. The forms include member and provider information, disenrollment criteria, notification steps, graduation readiness indicators, warm handoff documentation, closed-loop referral status, outreach attempts, and reason-specific documentation. The Children & Youth version includes additional fields and considerations related to parents/guardians, caregivers, schools, child welfare, behavioral health providers, and other youth-serving partners.	Creating or refining workflows for ECM graduation, disenrollment, reauthorization, or transition planning; standardizing documentation across adult and youth populations; documenting outreach and engagement efforts; ensuring warm handoffs and closed-loop referrals; or aligning staff around consistent exit and transition processes.
DHCS/CYBHI Evidence-Based Practices and Community-Defined Evidence Practices Resource Guide *Resource guide from DHCS*	A guide that helps providers, CBOs, schools, and counties **understand state tools and Medi-Cal billing pathways for evidence-based practices (EBPs) and community-defined evidence practices (CDEPs)**, including those connected to the Children And Youth Behavioral Health Initiative (CYBHI), Family First Prevention Services Act (FFPSA), Behavioral Health Community-Based Organized Networks of Equitable Care and Treatment (BH-CONNECT) initiative, and CalAIM.	Delivering or planning children, youth, family, school-based, behavioral health, or culturally responsive services and seeking guidance on evidence-based or community-defined practices and potential Medi-Cal reimbursement pathways.

Supporting Programmatic Financial and Business Planning		
Resource/Tool Name	**Description**	**Use this resource if you are…**
Claims Analysis Template *Template from BluePath Health*	A spreadsheet-based claims reconciliation tool that helps providers **compare invoiced services against MCP approvals, denials, pending claims, unpaid amounts, adjustments, and payment status.** The template includes a user guide, reconciliation summary, claims line-item tracking, and separate tabs for MCP approvals, denials, and pending claims.	A provider who needs a clear, structured way to reconcile invoiced services against MCP approvals, denials, pending claims, adjustments, and payment status.
Contracting to Align Health and Social Care Ecosystems: A Toolkit Sharing Leading Practices *Online toolkit from the Partnership to Align Social Care*	A toolkit that shares **leading contracting practices to strengthen partnerships between health care organizations and 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.

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.
Charting your PATH QI Series *Presentation slides from the HIP of Santa Cruz County*	A presentation slide deck that provides an **overview, tools, and Medi-Cal specific examples in the basics of quality improvement**, including the following: » The Model for Improvement » Plan-Do-Study-Act (PDSA) Cycles » Using data to drive improvement » Process mapping and other QI strategies	New to quality improvement and seeking foundational methods (Model for Improvement, PDSA cycles) with Medi-Cal–specific examples and practical tools for application.

Leadership, Workforce, and Relationships

Building Strategies that Support Workforce Well-Being		
Resource/Tool Name	**Description**	**Use this resource if you are…**
IHI Framework for Improving Joy in Work » IHI Framework for Improving Joy in Work White Paper » "What Matters to You?" Conversation Guide for Improving Joy in Work *White paper and step-by-step conversation guide from IHI*	A practical white paper that offers **four steps leaders can take to improve joy in work**; nine critical components of a system for ensuring a joyful, engaged workforce; a conversation guide; real-life examples of changes that work; and measurement tools. This conversation guide **details the dos, don'ts, and steps to try for each stage of the Joy in Work Framework**. It also includes a few key questions for a "What Matters to You" (WMTY) conversation.	Seeking strategies for reducing burnout and turnover through system-level workforce well-being approaches, tools, and examples, and facilitating structured, psychologically safe team conversations.
Strategies to Improve the Well-Being of the Health and Public Safety Workforce *Checklist from the Workplace Change Collaborative*	A checklist that details **tangible relational and operational strategies that can help improve the well-being** of the health and public safety workforce.	Aiming to address burnout, moral injury, and workforce stress through practical, evidence-based strategies and strengthen staff well-being.

Strengthening Workforce Engagement and Professional Development		
Resource/Tool Name	**Description**	**Use this resource if you are...**
Implementing the Complex Care Core Competencies: A Toolkit to Guide Education and Training *Toolkit from the Camden Coalition*	This toolkit includes the following: » An overview of complex care » Key considerations **for educators developing complex care education** » Key considerations **for managers developing a complex care training program for current practitioners** » Case studies and questions to be used in role plays	An educator, manager, or trainer needing to strengthen complex care programs with structured competencies, case studies, and practical resources.

Establishing and Deepening Relationships, Including with People with Lived Experience		
Resource/Tool Name	**Description**	**Use this resource if you are...**
Stakeholder Analysis Worksheet *Worksheet from the Camden Coalition*	This worksheet helps organizations **systematically analyze and map stakeholders**, rating their interest, commitment, motivation, and potential unique impact. Organizations can note the purpose of each relationship and any anticipated barriers to engagement.	Planning or scaling programs by prioritizing stakeholder engagement and preparing for strategic planning, partnerships, and communications.
Engaging People with Lived Experience Toolkit *Online toolkit from 100 Million Healthier Lives Initiative*	This toolkit contains **step-by-step guidance on how to partner with people with lived experience (PWLE)** to create lasting community transformation. In-depth resources and tools are included for each step. While this toolkit is focused on individuals who may need the most support, many of the strategies, tips, and resources contained here are those that help create a high-functioning team. There is also notable overlap with the work needed to engage communities.	Building inclusive partnerships and teams by integrating people with lived experience into strategy and community change.



The Broader Environment That Impacts the Work

Supporting Community-Wide Data Sharing and Coordination		
Resource/Tool Name	**Description**	**Use this resource if you are...**
Data Exchange Framework Implementation Toolkit *Toolkit from the Data Exchange Framework and the California Health and Human Services Agency*	A step-by-step guide for California health and social service organizations implementing the **Data Exchange Framework** (DxF). It covers the following: » What the DxF is and why it matters » Who must sign the data sharing agreement (DSA) and when » Which organizational changes are required » The role of intermediaries like Qualified Health Information Organizations (QHIOs) » How to enter choices in the Participant Directory and begin exchanging data (2024–2026)	California health care and social service leaders preparing for DxF compliance, secure data exchange, staff training, and implementation timelines.

Understanding the Policy Landscape and Communicate with Policymakers		
Resource/Tool Name	**Description**	**Use this resource if you are...**
Communicating with Policymakers: Delivery Tips 101 *Tip sheet from AcademyHealth via County Health Rankings & Roadmaps*	A simple tip sheet to **understand the what, who, and how of communicating with policymakers**. It also includes "flags and bridges," practical verbal tactics to engage listeners.	Preparing teams to deliver disciplined advocacy messaging and manage policymaker conversations effectively.
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.

Monitoring Policy Changes and Organizing for Action

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 a given organization » A **Mobilization Network** that equips organizations with the training, tips, and network needed to help advance health equity through spheres of influence	Monitoring policy changes impacting health equity and justice, or coordinating advocacy, community action, and stakeholder collaboration.

Strengthening Engagement by Understanding Community, Social, and Cultural Needs

Resource/Tool Name	Description	Use this resource if you are...
Understanding Culture, Social Organization, and Leadership to Enhance Engagement *Online brief and checklist from the Community Tool Box*	Guide to understanding **how cultural values, social networks, and leadership structures shape engagement within diverse racial and ethnic groups**. Get practical strategies for identifying leaders, building trust, and leveraging cultural institutions (e.g., churches, soccer clubs) to foster inclusive engagement.	Direct care workers building trust with immigrant, refugee, or culturally diverse populations. Program managers designing services that rely on partnerships with cultural groups. Backbone organizations or health plans improving engagement or outcomes by aligning services to community structures.

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.