

A RETROSPECTIVE ON A DECADE OF INVESTMENT

Hogg Foundation for
Mental Health Policy
Academy & Policy
Fellow Initiative



Hogg Foundation
for Mental Health

HOGG FOUNDATION FOR MENTAL HEALTH

Established in 1940, the Hogg Foundation for Mental Health envisions a future in which the people of Texas thrive in communities that support mental health and well-being. Using a variety of approaches, including grantmaking, convening, research, and public policy engagement, the foundation works collaboratively to transform how communities promote mental health in everyday life.

We believe that mental health is not solely an individual responsibility but is also a product of community conditions. The places where people live, learn, work, play, and pray can have a significant impact on improving mental health. Over the years, the foundation has awarded millions of dollars in grants to continue the Hogg family's legacy of public service and dedication to improving mental health and wellness in Texas. The foundation is part of the Division of Diversity and Community Engagement at The University of Texas at Austin. To learn more, visit hogg.utexas.edu.

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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.
Hogg Foundation for Mental Health, Executive Director

HELPING TEXANS THRIVE BY INVESTING IN POLICY ENGAGEMENT

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 Hogg Foundation for Mental Health's mission is to transform how communities promote mental health in everyday life. Policy engagement has always been a strategic priority for the organization and through education, the dissemination of policy briefs and system guides, as well as 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. It is the conviction of the Hogg Foundation that until issues of health disparities and racial inequities are made a priority and are addressed systematically, a healthy Texas will not be possible. However, the mental health advocacy community is limited in size and training. To leverage the foundation's investments, the state's mental health and substance use policy workforce would need to expand. In 2010, the foundation launched the Hogg Foundation for Mental Health Policy Academy and Policy Fellow Initiative ("initiative") with the goal

of bolstering the mental health and substance use policy workforce to make long-term systems change.

The initiative supports ten host organizations, either 501(c)(3) nonprofit organizations, government entities, or higher education institutions, to employ and mentor a full-time, mental health or substance use policy or peer policy fellow for two years. Policy fellows have 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 and their mentors also participate in a 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.

Please note that although there are differences between the two types of policy fellows, both are addressed as "policy fellows" within this report and in program activities. It is important to program officers that policy fellows see themselves as one cohort, with little distinction about the peers, unless there is a specific reason for acknowledging their role as a peer policy fellow.

ACHIEVING OUTCOMES

The goal of the initiative is to improve access to and quality of mental health services in Texas by building capacity 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, as well as 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 the policy fellow's salary, 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.



PROGRAM EXPERIENCE

Throughout the two-year fellowship, the policy fellows focus on diverse and innovative policy projects and activities that focus on the unique vision and mission of their host organization. The policy fellows explore being researchers, writers, presenters, trainers, organizers, collaborators, and leaders. Additionally, all policy fellows engage in a set of policy activities and experiences as depicted in the program map below.

YEAR 1

POLICY ENGAGEMENT INTRODUCTION

- Onboarding into host organization
- Introduction to policy academy and fellow cohort
- Understanding the influence points for mental health policy
- Deep dive into the various systems: i.e. executive, legislative, judicial branches

LEGISLATIVE SESSION PREPARATION

- Learning about the legislative and budget process
- Identifying priorities, researching policy solutions, developing legislative relationships, building advocacy collaborations, preparing policy briefs and other support documents
- Policy fellow cohort building and networking among host organizations

TEXAS LEGISLATIVE SESSION

- Collaborate with diverse stakeholders on issues of mutual interest
- Continue meeting with legislators and staff
- Provide education and technical assistance
- Assist with bill development and hearing preparation
- Provide testimony (oral and/or written)
- Respond to inquiries for information

YEAR 2

TRANSITION TO INTERIM

- Evaluate and summarize legislative session outcomes and impact
- Post-session policy strategy development
- Participate in agency rule-making process
- Continue engagement with diverse stakeholder groups

PROFESSIONAL DEVELOPMENT

- Continue professional development within host agency and through the policy academy
- Begin preparing for career advancement – resume preparation, interview skills, job search strategies

PROGRAM WRAP-UP

- Monitor implementation of legislative priorities
- Create transition materials for the work to continue after fellowship
- Participate in 1-week Washington, D.C. federal immersion experience
- Identify ways for policy fellows and host organizations to stay engaged and connected

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?

RETROSPECTIVE EVALUATION

To answer those questions, policy fellow alumni, as well as other participants, such as host organization supervisors, mentors, program consultants, and foundation staff were invited to share their insights and experiences.

Results showed that the 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.

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.

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

Peer support services; including increasing the Medicaid reimbursement rate for peer support services to a level 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 barriers and pitfalls that come with community reentry.

Access to quality healthcare for those struggling with substance use, and non-punitive approaches to reducing negative consequences associated with substance use.

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.

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.

“In a world struggling toward peace and universal humanitarian regard for mankind, there is no place for an aloof or exclusive institution.”

- Ima Hogg
Hogg Foundation for Mental Health, Founder

Ima Hogg (July 10, 1882 – August 19, 1975), known as “The First Lady of Texas”, was an American society leader, philanthropist, mental health advocate, patron and collector of the arts, and one of the most respected women in Texas during the 20th century. Hogg received numerous awards and honors, including the Louise E. du Pont Crowninshield Award from the National Trust for Historic Preservation, the Santa Rita Award from the University of Texas System, and an honorary doctorate in fine arts from Southwestern University.

SYSTEMS CHANGE PHILANTHROPY IS NOT ONLY ESSENTIAL, IT IS OUR RESPONSIBILITY

Some philanthropic organizations may be new to policy initiatives. Systems change requires long-term investment, resilience, and perseverance. It takes dedicated time and requires constant pressure from knowledgeable, experienced individuals and organizations who prioritize policy change to make an impact. Significant investment is needed to profoundly move the needle and mobilize systematic shifts that address inequities and promote mental health and well-being.

With this in mind, 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 the salary and health care benefits for the policy fellow, as well as reimbursement for staff time associated with supervising and mentorship. Policy academy activities, including site visits, expert presentations, networking events, and a trip to Washington D.C. for policy fellows and their mentors are also fully funded by the grant. By committing this level of financial support, 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 small philanthropic organization like the Hogg Foundation, but results have shown that the initiative has successfully provided a variety of nonprofit organizations the resources needed to prioritize mental health and substance use policy engagement.

“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.”

- Peer Policy Fellow Grant Partner

BUILDING ON THE APPRENTICESHIP MODEL

The system of apprenticeship was first 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. This system for training the next generation of practitioners was also often accompanied by additional academic studies that supplemented the experiential learning happening in their day-to-day work.

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

POLICY ACADEMY AND POLICY FELLOW INITIATIVE DESIGN

Careful consideration was given to designing this initiative and there are several key elements that have shown to contribute to its success. Each of these components is outlined in more detail in the following sections.

There are three grant opportunities within this initiative. They include:

- Five grants awarded to 501(c)(3) nonprofit organizations, governmental entities, or higher education institutions, to serve as host organizations which employ and mentor a full-time policy fellow for two years. These fellows are recent graduates of graduate programs in health, policy, law, social work, or other relevant fields. Each grant partner can be awarded approximately \$150,000 over the two-year funding cycle.
- Five grants awarded to 501(c)(3) nonprofit organizations, governmental entities, or higher education institutions, to serve as host organizations which employ and mentor a full-time peer policy fellow for two years. A peer policy fellow's lived experience is deemed equivalent to a graduate degree. Each grant partner can be awarded approximately \$150,000 over the two-year funding cycle.
- One coordination grant awarded to a 501(c)(3) nonprofit organization, governmental entity, or higher education institution, to plan, coordinate, facilitate, and evaluate the Hogg Policy Academy. This grant partner can receive approximately \$350,000 over the two-year funding cycle. Sub-contracts are awarded through the coordination grant, and they include funding for a peer policy 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 D.C. for policy fellows and mentors, also are supported by the coordination grant.

“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 Fellow Alumnus
2014 Cohort**

IMMERSION

The two-year fellowship offers the policy fellows direct experience with the mental health and substance use policy process in Texas. Policy and peer policy fellows work within organizations as full-time employees, and collaborate with a broad spectrum of allies, such as state agencies, school districts, community advocates and 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 positively contribute to their organizations’ goals, while learning along the way.

By immersing the policy fellows in the policy arena, the foundation has been able to witness many organizations making 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. Policy fellows are also given the opportunity to meet with legislative leadership and collaborate with advocacy partners at state agency workgroups, advisory committees, and coalition meetings. Over the years, policy fellows have been involved in the Judicial Commission on Mental Health, Child Protection Roundtable, Texas Coalition for Healthy Minds, Behavioral Health Advisory Committee, Mental Health Workforce Shortage Workgroup, and Parity Workgroup.

POLICY ACADEMY

The policy academy is an integral part of the initiative's success. Policy fellows enter the program with varying levels of education and experience. The policy academy serves as a dynamic learning community, meeting regularly to help build a sense of camaraderie among the policy fellows and mentors, while providing professional development opportunities on everything from the basics of the legislative process to the state's budget, and issue-specific presentations from experts in the field. Policy academy meetings are tailored to align with current issues and the policy fellows' areas of interest.

Examples of policy academy sessions:

- Primer on the Texas Legislative Process
- Texas Budget 101
- Communicating Effectively with Policymakers and Staff
- Administrative Advocacy: Working with State Agency Leadership
- Public Mental Health System
- Mental Health and the Criminal Justice System
- Addressing Racial Disparities
- Children's Mental Health
- Medicaid
- Best Practices in Social Media Advocacy
- Career Paths of Policy and Advocacy Leaders
- Bill Reading and Analysis Workshop

The policy academy offers robust professional development experiences that run parallel to the fellowship's direct, hands-on training. In addition

to monthly meetings, policy 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 a key role in the mental health system. The policy academy focuses on building knowledge and skills, while at the same time offering opportunities for both the policy fellows, their host organizations, and mentors to build relationships and strengthen the network of mental health and substance use policy advocates in the state. Policy academy activities also include optional social events for the program participants including 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.

WASHINGTON D.C. FEDERAL IMMERSION

Even though this initiative primarily has a Texas focus, foundation staff knew that the state's political process was always connected to what is happening nationally. To understand the true 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, policy 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 5-day educational and skill-building immersion experience.

Each day in Washington D.C. has a packed agenda, thoughtfully curated to the interests of the policy fellows, and include a mix of education,

observation, networking and experiential learning opportunities such as: visiting the U.S. Capitol to attend committee hearings, listening to presentations from national policy experts, meeting with Congressional office staff, sightseeing of historical buildings and museums, or team-building activities that strengthen relationships among the policy fellows, as well as the host organizations.

Meeting national experts is a cornerstone of the Washington, D.C. immersion experience, and the policy fellows, along with their mentors, have had the chance to spend time with representatives from the Department of Health and Human Services, the Substance Abuse and Mental Health Services Administration, the National Institute of Health, and the Centers for Medicare and Medicaid Services.

Policy fellows are also given an opportunity to explore the role that national associations and advocacy groups play in the policymaking process. In the past, those have included the National Association of Medicaid Directors, Mental Health America, the National Council for Mental Wellbeing, The Bazelon Center for Mental Health Law, the National Association of County Behavioral Health and Developmental Disability Directors, and the National Association of State Mental Health Program Directors.

Another powerful component to the experience is the tailored, one-on-one meetings that are arranged for the individual policy fellows. Using the Hogg Foundation and the Washington D.C. immersion coordinator's professional networks and relationships, the policy fellows and their mentors are invited to meet with policy leaders who hold expertise in their areas of interest. For example, one of the policy fellows met with Dr. Richard Frank

from Harvard Medical School's Department of Health Care Policy. Over coffee, that policy fellow was able to ask questions, receive career coaching, and even develop a life-long mentor.

Hearing directly from national mental health and substance use policy experts and advocacy pioneers helps policy fellows see the big picture of systematic change. By observing the federal policy process in person and physically stepping into some of our nation's most sacred buildings, like the U.S. Capitol, policy fellows come to understand that:

- These spaces are meant to be used in service of the public's interest.
- Advocates like them have, for hundreds of years, positively impacted public policy in countless ways.
- Systems change is challenging work, progress takes time, and requires the involvement of a lot of people.

The Washington D.C. immersion experience is a success if the policy fellows return feeling empowered to play a role in mental health and substance use policy in Texas.

“Real world people don't speak policy wonk and policy wonks often cannot hear real world speak. We need translators that can navigate both worlds.”

**- Peer Policy Fellow Grant Partner
2018 Cohort**

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 peer and consumer voices could have on shaping mental health and substance use public policy, the foundation added a parallel peer policy fellowship opportunity for those with lived experience. A peer policy fellow is an individual with a mental health or substance use condition, who is willing to share their experiences publicly to promote policy change. The goal was to amplify the voices of peers and consumers, by investing in building their knowledge and skills to advocate for policy change more effectively.

Reflecting, 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 impacts of the policy process. Policy fellows shared how building those relationships brought a human dimension to the legislation. Grant partners said that it helped them 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.

“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.”

**- Policy Fellow Mentor
2020 Cohort**

HOW THE RECOVERY MOVEMENT OPENED THE DOOR

The struggle to integrate lived experience in public policy processes is not new but has seen significant progress over time. One of the best examples of the power of peer and consumer voices is demonstrated by the movement to integrate the recovery model into mental health and substance use services.

The idea that recovery was even possible for those with mental health or substance use conditions was only introduced around the 1930s, exhibited by the development of the Alcoholics Anonymous program, a fellowship of people focused on sobriety. Before that, individuals who were diagnosed with mental illness or were experiencing a mental health or substance use condition were often thought to be hopelessly bound to their symptoms.

It was through advocacy by those with lived experience that the idea of recovery began to be adopted by mental health systems. The Consumer and Survivor Movements of the 1980s and 1990s helped propel the idea of recovery to the forefront of public health conversations, and as a result, a majority of mental health systems now embrace a recovery model. The cumulative impact of personal stories and public testimony was a powerful force behind the development of more progressive approaches and policies.

It is through efforts like these and demonstrations of the value of their voices, that individuals with lived experiences began to be invited to shape the systems that were meant to serve them.

POLICY ACADEMY COORDINATION

As an integral part of the initiative's design, the foundation offers a coordination grant to provide the organizational backbone needed to plan and facilitate policy academy programming — including meetings, mentorship, collaboration, networking, and experiential field trips. The coordinator awards subcontracts for a peer consultant and a Washington, D.C. federal immersion coordinator consultant.

PEER CONSULTANT

In 2014, when staff at the foundation started to explore how to integrate peer and consumer voices in the initiative, they worked with a peer consultant who observed activities and offered recommendations for the design of the peer policy fellow track.

Once the peer policy fellowships began in 2016, funding was allocated to continue the peer consultant's role in the program. The position focuses on supporting the peer policy fellows and their host organizations, as well as connecting the policy academy to resources and inviting consumer advocates to talk with the policy fellows at meetings.

“We make sure the Academy is a safe and comfortable space for the fellows and mentors to talk about their personal experiences and ask tough questions. It’s not a formal learning environment — it’s more of a learning collaborative.”

- Stephanie Rubin
Texans Care for Children, CEO
Policy Academy Coordination
Grant Partner

A MOMENT FOR RETROSPECTIVE EVALUATION

In 2020, the Hogg Foundation for Mental Health Policy Academy and Policy Fellow Initiative celebrated ten years of investment in building capacity and expertise in mental health and substance use policy engagement in Texas. Staff wondered:

In what ways is the initiative making an impact?

What lessons were learned over time?

METHODOLOGY

Research explored whether the program:

- Deepened policy fellows' knowledge of public policy and mental health advocacy.
- Increased policy fellows' skills for navigating the policy and advocacy arena in Texas.
- Retained alumni in policy, mental health, or related fields after their fellowship.
- Increased grantee organizations' ability to participate in mental health policy.
- Created a stronger network of mental health advocates in Texas.

In order to answer these questions, the foundation gathered information about the effect of the program on the lives of the policy fellows, mentors, and host organizations. A mixed-methods, retrospective evaluation approach was used to produce findings for this report, and included: document review, interviews, observation, and quantitative and qualitative survey analysis.

Key documents and materials reviewed included: the initiative's project charter; a program evaluation report completed by the Public Policy Research Institute at Texas A&M University (2005); "Hogg Academy Peer Policy Fellows Feedback" memo (2018-2020 cohort); past policy academy agendas, orientation documents, training materials, and meeting notes; as well as communication materials covering the program on blogposts, podcasts, or social media.

Interviews were conducted with Texans Care for Children's Stephanie Rubin (CEO) and Sondra Lehmann (Deputy Director) whose organization has received the policy academy coordination grant since the program's inception. Noah Abdnour (Peer Consultant) and Noel Mazade (Washington D.C.

federal immersion coordinator) were interviewed about their roles and shared how the program has developed over time and their ideas for the future. Additionally, time was spent with Colleen Horton (former Director of Policy, Hogg Foundation) in order to gain insight into the program's history and the impact she has witnessed over a decade of direct involvement.

Observation included attending a presentation in 2018 on the findings from an internal, developmental evaluation, contracted by Texans Care for Children, in response to the new peer policy track added during the 2016-2018 cohort. Goals included understanding the peer policy fellows' experience with the program and to identify opportunities for improvement. A more recent observation included attending a policy academy meeting with policy fellows and mentors (2020). The goal was to deepen understanding of the program's curriculum and training opportunities, as well as how the program works to develop a network of mental health policy fellows, and advocates.

Two online surveys were developed, each for a specific subgroup (i.e., "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 (subgroup A) and 15 minutes (subgroup B). Subgroup A (policy fellows and alumni) had 34 total respondents (65 percent response rate) and subgroup B (mentors) had 17 total respondents (38 percent response rate).

RESEARCH LIMITATIONS

It is important to note that the quantitative survey results are from a small sample size, which can compromise the conclusions drawn from this study. Results can easily be skewed by a small number of respondents. Although there is a high response rate (65 percent) for subgroup A, there are still eighteen policy fellows who did not respond to the 2020 online survey (35 percent). Policy fellows who had a meaningful experience in the program could be more likely to respond due to their appreciation of the foundation's support – and those who did not find the program as beneficial might be less likely to participate. Additionally, others might not have had time to answer the questions or might not have received the survey at all.

A good faith effort was put in to find 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. Participants' contact information was not updated over time and many records had their professional email address from their host organization, not their personal email listed. Furthermore, many staff who supervised policy fellows at host organizations have moved on to other positions and mentors who were contracted through host organizations from early program years were difficult to find. Emphasis was put on using quotes from respondents to illustrate retrospective findings, rather than share data analysis that would offer less meaningful conclusions.

From an equity lens, it is essential to the foundation that individuals with lived experience with a mental health or a substance use condition have their voices elevated and included in all evaluative practices. For this retrospective, nine out of 15 current or former peer policy fellows (60 percent) filled

out the online survey. It is important to note that peer policy fellows account for 26 percent of all survey responses and therefore, this percentage is proportionate to the total number of policy fellows in the program. Looking forward, the foundation seeks to engage benefactors of the initiative in the evaluation design and sensemaking of its findings. Although those with lived experience were given an opportunity to share their thoughts on the program, their wisdom would be even more meaningful if included earlier in the evaluation design process.

Finally, this retrospective report includes information from recent evaluative research by the Hogg Foundation's strategic learning and evaluation program officer. Even though objectivity was a chief priority, mistakes and bias can occur when conducting an internal evaluation. To reduce the issue, multiple individuals, inside and outside of the organization, engaged in peer review of the report and careful consideration was given to reference information shared by external evaluators (i.e., 2015 and 2018 evaluation reports, policy academy post-fellow and mentor surveys.). These methods helped to secure as much accountability and objectivity in the process as possible, under the project constraints.

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

**- Policy Fellow Alumnus
2014 Cohort**

IN WHAT WAYS IS THE INITIATIVE MAKING AN IMPACT? RESULTS SHOWED



Knowledge

At the beginning of the program, 73 percent of respondents reported that they felt slightly or not at all knowledgeable about public policy and mental health advocacy.

After completing the program, 84 percent said they were now very or extremely knowledgeable

Before  After 

Extremely Knowledgeable



Very Knowledgeable



Moderately Knowledgeable



Slightly Knowledgeable



Not at all Knowledgeable



Skills

At the beginning of the program, 83 percent of respondents said that they were not at all or only slightly skilled at mental health policy and advocacy.

After the program, 80 percent reported now being very or extremely skilled.

Before  After 

Extremely Skilled



Very Skilled



Moderately Skilled



Slightly Skilled



Not at all Skilled



DEMONSTRATED IMPACT

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 (HHSC) created a Peer and Recovery Services Programs, Planning and Policy Unit that focused 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 shortage areas in the state 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 that they were just as skilled as other policy specialists, and just as needed as other health care professionals.

“We see the fellows everywhere – they are doing the important work that needs to be done. This wouldn't be happening if the manpower wasn't there – if the resources hadn't been invested.”

- Colleen Horton
Hogg Foundation for Mental
Health, Former Director of Policy

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 healthcare 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.

“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.”

**- Josette Saxon
Texans Care for Children**

“Our two peer policy fellows helped expand the use of certified peers in correctional settings. They were instrumental in helping us bring trauma-informed and peer-driven pre-trial and non-arrest interventions for people ensnared in the commercial sex trade. One of the fellows now has three certifications, volunteers at the sobering center, and has helped to build certified peers into legislation. She is growing a statewide coalition of justice-involved leaders from across the state. The policy fellows' involvement has expanded our organizing and advocacy capacity exponentially.”

**- Peer Policy Fellow Grant
Partner
2018 and 2020 Cohorts**

WHAT LESSONS WERE LEARNED OVER TIME?

Over the past ten years, foundation staff have sharpened their understanding of the distinct elements that contribute to the initiative's success. The following offers some key reflections that surfaced through the retrospective process:

- Policy fellowships can improve lives and launch careers.
- The policy academy is key to achieving the initiative's goals.
- Inclusion of those with lived experience improves program outcomes.
- Federal immersion broadens participants' perspectives.
- Mentorship matters.
- Navigate foundation participation with care.
- Investing in policy academy coordination helps foundation staff.
- The peer consultant should support the policy fellows, host organizations, and policy academy coordinators—not only the peer policy fellows.

POLICY FELLOWSHIPS CAN IMPROVE LIVES AND LAUNCH CAREERS

Throughout the evaluation process, respondents shared a variety of ways that the policy fellow program meaningfully impacted their lives. Alumni remarked that the program increased their confidence in their ability to effect change (90 percent) and improved their knowledge and skills needed to engage in the policymaking processes. Ninety-seven percent (97 percent) of policy fellows felt the program was beneficial to them.

Many mentioned how the program helped develop their professional network (86 percent) and most alumni reported that they are still working or involved in the field of health policy, mental health, substance use, or related issues from their fellowship (89 percent).

A few examples of organizations where alumni work:

- National Alliance on Mental Illness – Texas
- National Association of Social Workers – Texas
- Texas Health and Human Services Commission
- Texas Harm Reduction Alliance
- The SAFE (Stop Abuse For Everyone) Alliance
- Court Appointed Special Advocates (CASA) for Children

THE POLICY ACADEMY IS KEY TO ACHIEVING THE INITIATIVE'S GOALS

Although every transition into a new professional capacity involves a learning curve, the policy academy rids the policy fellows of the pretense that fluency is required straight out of the gate. Results from the alumni survey showed significant gains in knowledge and skills over the two-year grant cycle.

Program consultants shared 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.

“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.”

- Peer Policy Fellow Alumnus
2018 Cohort

FEDERAL IMMERSION BROADENS PARTICIPANTS' PERSPECTIVES

Foundation staff have learned that the federal immersion experience is an important vehicle for achieving many of the program's objectives as well. 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 get into the arena and make a difference.

Coordinators have found that by taking program participants to the nation's capital and giving them opportunities to talk directly with experts, advocates, and legislators, the policy fellows deepen their understanding of the big picture of policymaking. Additionally, for many it is also an opportunity to meet other people, just like them, who care about something, and want to make it better. This normalizes the path to becoming a policy professional.

Traveling to the nation's capital as a cohort has built a strong sense of camaraderie among the participants. By inviting not only the policy fellows, but their mentors, supervisors, the peer consultant, and policy staff from the foundation, the federal immersion experience offers many informal opportunities to deepen relationships between mental health and substance use policy advocates.

The peer consultant remarked that this was an important time for the policy fellows and the peer policy fellows to get to know one another. After a long day from a packed agenda, the policy fellows would often find each other and spend time reflecting on their days. The exchange is significant

for the policy fellows who did not apply as a peer because they are invited to see policymaking through the eyes of someone with lived experience – and for the peer policy fellows, they got to understand the nuts and bolts of the policy process from someone who studied these topics in school.

“It’s just incredible to see a group of people that’s so different work to lift each other up, rather than tear each other down — which is not something you always see in a political field. If that’s not what it’s like in the ‘real world,’ then a key takeaway from the fellowship will be: how do I bring what the Hogg Foundation has built into the broader policy field? How do I recreate this positive and productive environment for others?”

**- Policy Fellow Mentor
2016 and 2018 Cohort**

MENTORSHIP MATTERS

Connecting the policy fellows with experienced policy professionals has shown to have significant effect on the fellows' satisfaction with the experience and adds tremendous value to achieving program outcomes. Mentors come from 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 for both the policy fellows and the mentors.

Policy engagement is full of nuances, complexity, and the levers of change are often difficult to find. Many policy fellows start the program with little experience and having someone to turn to helps to not only build knowledge, but confidence to take risks and get in the arena. At the end of the day, attentive mentors have shown to greatly enhance a policy fellow's experience — both during and after their involvement with the program.

“Over time I became friends with my mentor, and we're still colleagues to this day. I can rely on her for career advice, for professional advice, for public policy advice, and vice versa — now that I've become a policy expert in different realms than she is.”

- Policy Fellow Alumnus
2014 Cohort

NAVIGATE FOUNDATION PARTICIPATION WITH CARE

The Hogg Foundation continues to host a policy or peer policy fellow within the organization, and therefore, participates in program activities. Foundation staff are in the unique position of holding multiple roles during that time, including that of a funder of the initiative itself, a program officer

overseeing the grants, mentors to the policy fellows and program partners, and as a participant in the policy academy as a host organization.

Directly communicating about the roles of the supervisors, policy academy coordinators, mentors, peer consultant, and Hogg Foundation staff is important and should be done early in the program cycle. For example, program officers learned over time that policy fellows would often go to the policy academy coordinators or Hogg Foundation staff when they encountered a problem. Foundation staff have communicated that they are always available to offer expertise or advice, but that the policy fellows are first and foremost full-time employees of their host organization and should engage their supervisor, mentor, or peers in finding solutions first.

As a funder of the initiative, program officers should also communicate that future 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. Additionally, staff found that it was incredibly important to ensure that the policy fellows and grant partners understood their relationship to the foundation. For example, the policy fellows are encouraged to introduce themselves as a policy fellow at their host organization, rather than a policy fellow at the foundation. They could, however, mention they are a participant of the Hogg Foundation Policy Academy and Policy Fellow Initiative.

Clearly communicating roles is important. 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 any lobbying efforts. Ensuring that policy fellows' work is not seen as a direct extension of the foundation protects the reputation and effectiveness of the foundation's role as an issue-area specialist and educator, rather than an advocate for specific legislation or policy change. One way that the foundation addressed this concern in their

program design was to allow host organizations to allocate a portion of the policy fellows' time to lobby efforts that are not funded by the Hogg foundation grant, but by another source of income. For example, some grant partners have asked for ninety-five percent of the policy fellows' salary and have supplemented the remaining five percent from additional funding that doesn't have the same restrictions about lobbying activities.

INVESTING IN POLICY ACADEMY COORDINATION HELPS FOUNDATION STAFF

Funding an external policy academy coordinator grant has shown to be a key element to the initiative's success. As the foundation is a small philanthropic organization, the external coordinator reduces the program's impact on staff and allows the policy team to continue managing their robust policy engagement portfolios. Additionally, by having someone outside of the organization coordinate activities, foundation staff can engage as participants, which not only helps build relationships for the foundation itself, but it also gives staff the opportunity to recognize issues as they arise and immediately make course corrections when needed.

THE PEER CONSULTANT SHOULD SUPPORT THE POLICY FELLOWS, HOST ORGANIZATIONS, AND THE POLICY ACADEMY COORDINATORS

The peer consultant makes the goal of inclusion a reality and ensures that there is thoughtful engagement of those with lived experience of mental health or substance use conditions in program activities. 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, mentorship with the peer consultant offered a sense of knowing that they are not alone and that there was someone that they could go to if they needed support. The peer consultant remarked however that many of the issues were often best handled with their host organization supervisor. It was important to the peer consultant that peer policy fellows learn how to navigate being a professional in all settings – remarking that “if you have an issue at your job, outside of the confines of a fellowship program, you address those needs with your direct supervisor.” Therefore, many were encouraged to talk to their supervisor or reach out to other policy fellows to find solutions.

“It’s been so fulfilling to take some of the hard skills I learned in grad school and really bring them down to a human level. To connect with people, and to see what issues they’re dealing with rather than rely on what research tells me they may be dealing with. To actually hear the real stories so that once we go to the capitol, we can elevate those voices and make sure we’re addressing real problems.”

- Policy Fellow Alumnus
2016 Cohort

LOOKING FORWARD

Evidence demonstrates that the initiative is making an impact in Texas. As a learning organization, the foundation was also interested in understanding potential areas for program improvement. Several recommendations that surfaced during the retrospective process include:

- Begin the Washington D.C. federal immersion 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 city or regional policy engagement, compared to the state-level focus of the current program.
- Keep virtual engagement options post-pandemic.
- Coordinate more alumni activities and opportunities for continued professional development and networking.

CONCLUSION

The Hogg Foundation for Mental Health Policy Academy and Policy Fellow Initiative has shown to have a profound impact on mental health and well-being in Texas. Over the past decade of investment, the initiative has succeeded in significantly expanding the pool of knowledgeable and skilled advocates, increased organizational capacity for policy engagement, and strengthened relationships between stakeholders in the field.

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 and the emphasis on their meaningful involvement in policymaking, consumers of mental health services have more opportunities than ever before to shape the systems that impact their lives. Texas's behavioral healthcare system has changed and now includes more access to peer support services than ever before. With these findings in mind, the Hogg Foundation for Mental Health Policy Academy and Policy Fellows Initiative have shown that over the last decade, it has succeeded in making a substantial difference in the mental health and substance use policy landscape in Texas.

“I never saw myself as someone that could make real change. To be quite frank, I felt under-qualified 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 continue fighting for a better future – and we have this program to thank.”

**- Policy Fellow Alumnus
2018 Cohort**




Hogg Foundation
for Mental Health

ABOUT THE FOUNDATION

Established in 1940, the Hogg Foundation for Mental Health envisions a future in which the people of Texas thrive in communities that support mental health and well-being. Using a variety of approaches, including grantmaking, convening, research and public policy, the foundation works collaboratively to transform how communities promote mental health in everyday life.

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