

# Introducing the Rural Philanthropy Toolkit – 02/26/19

**Kristine Sande:** Good afternoon everyone. I'm Kristine Sande and I'm the program director of the Rural Health Information Hub. I'd like to welcome you to today's webinar, introducing the Rural Philanthropy Toolkit during which we'll be hearing some great insights on building relationships with philanthropies, I'll quickly run through some housekeeping items before we begin. We hope to have time for your questions at the end of the webinar today.

If you have questions for our presenters, we ask that you submit those at the end of the webinar using the Q&A section that will appear on the lower right hand corner of the screen following the presentations. We've provided a PDF copy of the presentation on the RHI Hub website, and that's accessible through the URL that's on your screen, and we also have just sent a link to that, to the slides via the chat function. For technical issues during the webinar, please call Webex support at (866) 229-3239.

And now it is my pleasure to introduce our speakers for today's webinar. First we'll hear from Alycia Bayne. Alycia is the Principal Research Scientist at the NORC Walsh Center for Rural Health Analysis and she will introduce the Rural Philanthropy Toolkit. Next, Kelly Heaton, the Executive Director of Power Up, Speak Out. We'll discuss strategies for establishing and sustaining partnerships with philanthropies. Power Up, Speak Out is a five lesson toolkit for educators that encourages middle school students to think critically about healthy relationships, power dynamics, boundaries and consent.

The program has been used by half of the counties in Montana and in nine other states. Power Up, Speak Out, participated in the local funding partnerships program funded by the Robert Wood Johnson Foundation and has received grants from other philanthropies. Finally, we'll hear from Paul Lindberg, who is the Collective Impact Health Specialist, a position established through a partnership of the United Way of the Columbia Gorge and Providence Hood River Hospital. Lindberg brings together community partners across sectors in the Rural Columbia Gorge region in North Central Oregon and South Central Washington to help to identify community needs, convene partners to design initiatives and pursue funding. Lindberg will discuss his experiences as establishing partnerships with philanthropy.

And with that I will turn it over to Alycia.

**Alycia Bayne:** Thank you so much Kristine, and thank you all for joining the webinar. Today, I'm happy to be able to introduce the Rural Philanthropy Toolkit. The Rural Philanthropy Toolkit, and all of the toolkits available on the Rural Health Information Hub or developed as part of the Rural Health Outreach Tracking and Evaluation program.

This program is funded by the federal office of Rural Health Policy within the health and services administration. It's conducted by the NORC Walsh Center for Rural Health Analysis in partnership with the University of Minnesota Rural Health Research Center. NORC and the University of Minnesota work with the National Organization of state offices of Rural Health and the National Rural Health Association to disseminate findings from this study.

As part of our process to develop the Rural Philanthropy Toolkit, we studied the experiences of rural communities that were funded under the outreach authority of section 330A of the Public Health Service Act. Outreach Authority grantees are rural communities across the country that have been funded to expand rural healthcare access, coordinate resources, and also to improve quality.

A key focus of our work has been to establish a rural evidence based, which includes developing evidence based toolkits drawing from the experience of grantees as well as other rural communities. Evidence based toolkits are an important step in disseminating successful programs. Our toolkits have three aims to identify evidence based and promising programs in rural communities to study the implementation of these programs in rural communities, and to disseminate best practices from rural communities.

The purpose of the toolkits is to ensure that future grantees and other rural communities have the resources and information that they need to implement successful programs. In 2018, we developed a toolkit to help rural communities to develop partnerships with philanthropies. Philanthropies are important partners that can help rural programs to achieve their goals through grant making capacity building and other resources.

Research suggests that only a small percentage of foundation grants are dedicated to rural communities. At 2015 economic research service study found that rural organizations received on average five and a half percent of total domestic grants from large foundations between 2005 and 2010. And from smaller foundations, rural organizations received 7% in 2009.

It's important to note that it's challenging to quantify the total share of grant making in rural communities since grants and urban communities may also benefit rural populations, but I think the key takeaway here is that philanthropic investment in rural communities is smaller in comparison to urban communities.

Let's talk some more about that. We know that rural communities face challenges to building partnerships with philanthropies. Their lack access to philanthropies. Many national philanthropies in the US are located in urban communities or non-rural communities and it can be challenging for small and rural communities to build relationships with philanthropy's if they're not located in the same geographic area, they may lack resources to travel to conferences and events where they can meet funders.

Second, when funding a program philanthropy's want to understand its potential to make an impact. A rural program operating in a community with a low population density may make a large impact in that one community, but serve a small population overall. This can affect a rural communities ability to attract philanthropic investment.

A third issue is that rural organizations may lack the resources and time needed to build partnerships with philanthropies or to invest the resources in preparing competitive grant applications. And rural programs may not have the funds to dedicate to recruiting and retaining staff with specialized skills and knowledge in areas that are important to philanthropies, such as data collections, analysis and evaluation.

So recognizing these challenges, we developed the Rural Philanthropy Toolkit, which is designed to share practices that rural communities can adapt to establish partnerships with philanthropies. Our methods were to review applications from grantees of the Federal Office of Rural Health Policy and the literature on rural philanthropy, we conducted telephone interviews with rural programs and experts in this field.

We developed the toolkit, which is a web-based resource that provides strategies, information and other resources for rural communities. And the toolkit is available on the Rural Health Information Hub website. The toolkit is organized in two different modules as you can see on the menu on the left, each module focuses on different considerations for establishing and

sustaining partnerships with philanthropies. There's also a program clearinghouse that can connect you to more information about rural programs that have used these strategies.

Module two is our emerging practices section, and this is what I want to focus on. It describes emerging practices that are implemented in rural communities. We described these practices as a merging because they are not researched tested, they hold promise based on the experiences of the programs and philanthropies that have implemented and recommended them.

So next I want to just share a few of these emerging practices and you can learn more about each of these in the toolkit. So I'll begin with strategies for preparing for partnerships with philanthropies. Prior to engaging with philanthropies rural program staff must be able to clearly and concisely articulate the program's goals. Staff and philanthropy leaders emphasize the importance of developing an elevator speech or a concise overview of the program that can be shared with philanthropies.

This overview should communicate the problem you're addressing, how the program you've developed will address the problem, the difference your program will make if it's successful. What will happen if the program is not conducted and also share your program's unique assets. Second, rural programs need to identify philanthropies that may be appropriate partners. A community foundation is a good starting place and if the foundation is not appropriate as a funder, they may be able to refer you to other funders.

Many states have a non-profit association that can facilitate connections to people throughout the state. This can be particularly helpful in large states where it's challenging to identify funders across a large geographic area. You can also consider community champions and people at local organizations. Rural programs should also learn about the philanthropies interests, history of grant making and past projects. It's important to review any publications that you can to understand the philanthropies funding priorities and initiatives. As one rural program leader said, "You can have a great program and if it doesn't align with the philanthropies interests, it won't be funded."

Next, I want to talk about strategies for approaching philanthropies. Fundamentally, the process begins with building a personal relationship with the philanthropy. During our interviews, we learned about strategies for developing relationships with philanthropies. One highly effective yet underutilized way to initiate a relationship with a philanthropy is to meet them at a meeting, a workshop or a conference where they're speaking on behalf of an issue.

If it's not possible to do that, another way to connect with them is to follow up by phone or email with an introduction about your program and the ways that it could align with the philanthropy's current work. Philanthropy leaders noted that email outreach in advance of the phone call sometimes it's helpful. It can give them time to learn more about the program. The philanthropy may or may not respond to your inquiry, but this type of outreach can be an important first step.

Rural program leaders also invite philanthropies to visit their communities. Site visits can provide an opportunity for program leaders to tell the story of the program and its impact and help the philanthropy understand how they may be able to contribute to the issue. Next, I want to briefly touch on strategies for establishing partnerships, and we have a lot of detail on this in the toolkit. For rural organizations that have never partnered with a philanthropy reaching out to a community foundation or a state, regional or local foundation can be a great place to start.

Community foundations in particular play an increasingly important role in improving the quality of life in rural regions and other areas around the country. This toolkit also contains resources and considerations for establishing partnerships with national foundations, corporate philanthropies, community development, financial institutions which invest in local rural organizations and also health conversion foundations, which are important partners in rural communities.

We also cover a number of other topics. Finally, I want to wrap up with a few lessons learned from rural communities that have been successful in establishing philanthropic partnerships. First, relationship building can require a significant investment of time. It can take years to cultivate a relationship with a philanthropy. It's important to consider that this outreach and efforts that you invest may not yield immediate benefits to your organization.

Second, programs with community buy in and engagement are often more appealing to philanthropies because these programs may be viewed as more likely to be sustainable. Rural programs that have successfully established partnerships with philanthropies, know that the importance of maintaining a positive presence in their local community.

When philanthropies conduct site visits, they may meet with other community stakeholders to understand how well the program is integrated in the community. It's important to consider how supportive the broader community is of the program. Third, philanthropies may not be able to invest in programs that serve a small number of people regardless of how promising the program is.

This goes back to being able to show the program is having an impact. Some rural programs in an effort to increase their sample size, have partnered with other similar rural programs in their state or region and had been successful in securing funding. Fourth, it's important to stay in regular contact with the philanthropy if funded about the programs accomplishments, philanthropies want to hear about the impact of the programs that they're investing in. So it's important to stay in touch about milestones throughout the project.

And finally, no single philanthropy will be a partner in perpetuity, so thinking about sustainability is important. The toolkit addresses this topic of sustainability and also provide suggestions that can help in planning for sustainability. One final and important point, the focus of this toolkit is to give rural communities resources to establish partnerships with philanthropies. However, philanthropies are also using innovative strategies to reach into rural communities.

Anecdotal evidence from our toolkit suggests that there is a resurgence of interest in investing in rural communities. Philanthropies are embedding program staff in rural communities to focus on regional community building, they're providing technical assistance to help rural programs strengthen their grant applications. For example, by working with rural programs staff to strengthen evaluation and sustainability plans, and they're doing this during the grant application period, as well as during the funding period.

And finally philanthropies are connecting role programs to other philanthropies and funders when they're unable to help them. They're making warm introductions on behalf of these programs. These are just a few of the lessons learned from our work on this project. We encourage you to visit the Rural Philanthropy Toolkit to learn more and to access resources that may be helpful.

So thank you so much for your time and I'm going to turn it over to Kelly Heaton.

**Kelly Heaton:**

Great. Thanks so much Alycia. Good morning everyone. It's still morning here in Montana where I'm calling from. My name is Kelly Heaton and I'm the Executive Director of Domestic and Sexual Violence Services and then our violence prevention curriculum called Power Up, Speak Out. So DSPS was established in 1999, we are celebrating 20 years this year, so we're very proud of that. We serve primarily Carbon and Stillwater counties here in Montana.

So if anyone knows where Yellowstone is, we are on the north east entrance to Yellowstone. So we cover a very large geographical area almost 4,000 square miles and we've got a population of about 20,000 people. So here in our community there's only one street light, there's no box stores, there's no chain stores, there's no public transportation, and we're about 60 miles away from all of those the big city, kind of what we call the big city amenities.

We are located, our main office is here in Red Lodge, Montana, where the county seat for Carbon County, and then we just opened this past fall, a satellite office in Columbus where we serve victims of domestic and sexual violence. There is a staff of nine of us and our violence prevention program, Power Up, Speak Out was piloted back in 2012 and we're now being used in 12 states outside of Montana and then about half of the counties throughout the state.

Then our mission there is to serve survivors impacted by abuse and to promote healthy, equitable and violence free relationships. That last part of the mission statement is extremely important to us, our main goal at the end of the day is to break the generational cycle of violence. We want kids to grow up in healthy relationships and to understand what they deserve in healthy relationships so that they don't end up in our office as adults. So our goal is to work ourselves out of business.

So a little bit on the history of Power Up, Speak Out as I said, it's our violence prevention curriculum and it's geared towards middle school students. So back in 2008 and 2009, we were sending staff members out into the field and to these very rural schools and very rural communities and using urban curriculum violence prevention curriculum. And what we were finding is that just didn't resonate with our students. There was talk about gangs and drive by shootings and strategies for avoiding bullying.

We're taking a different route to school or changing your locker location. And then there are schools, there's one road into town and there's one road to the school. And at the school, there are one bank of lockers, so changing your locker location is not really an option. So we started looking around at curriculums that were existing, trying to come up with something that would work for the students that we were reaching. And we just couldn't find anything that worked. So our first goal was to create a violence prevention curriculum that's designated for students in rural communities, kids that we were reaching that we wanted to make sure that they were connecting that violence does happen in their schools and that there is unhealthy relationships happening all around them.

But they were unable to see that and connect with the programs that we were using to begin with. So as Kristine said, we started telling our story, which I'll get to in a little bit, we started telling our story and our challenge to funders in our area and we were able to gain the attention of the Robert Wood Johnson Foundation and they gave us a three year grant to create Power Up, Speak Out.

We, that grant required us to have lots of local and matched vendors. So once again, we had to reach out to others and to find more people that were interested in what we were doing. And again, I'll get to more of that in just a couple of slides. We've gone through several revisions of

the curriculum and it's currently in its current version, it's five lessons. And our initial design was to provide this free education and training to Montana teachers.

So through grand tours, generous grant tours, we were able to give away free toolkit that has everything that a teacher needs to facilitate the lessons in their classroom and provided them free training all because of these grand tours that we had. After a couple of years, I think as Alycia alluded to, grantors, there's always something new and shiny for grantors to fund.

And so we were finding that some interest was starting to wane in our program, not because it wasn't great, but just because there's others that new programs for them to invest in. And so in 2017, we modified to become a nonprofit business model in which we're selling the toolkits outside of Montana.

Just a couple of other goals, to teach the students how to recognize a characters of a healthy relationship and an unhealthy relationship and then how to intervene in unhealthy relationships. Eventually, we want to become an evidence based program and again, just to break that generational cycle of violence. I should note too that we still do give out a few free toolkit through a scholarship program that is still supported by one of our grantors.

So in building can like connections, I know that we all understand that fundraising is all about relationships. It's all about connections and networking, finding people that want to have shared goals or that want to help you meet your very important goals. So one of the, I think it's really beneficial to be prepared before you start going out to connect with different philanthropies or different people who might be interested in helping you, helping support your program.

So first, just make sure that you're really clear, that your entire staff and board is really clear about your mission and goals. It's really easy to get into mission drift where you are trying to fit your goals and your program into a funders' priorities, and that can get really dicey and really messy. So I would just encourage all of you to make sure that you know what your mission and goals are and then find appropriate partners.

Start small, so those two to three goals and a clear plan as you start, make sure you've written them down, make sure you've talked to your board and staff about what those are. For us, our first small goal, I mean it's a big thing to create a curriculum, but that was our small, where we started was we have this need, these urban programs aren't working, we need to create something else.

So then we started talking to people in our area, so I know that, I'm sure many of you have noticed that lots of grants these days are talking about collaboration. They want people to be partnering with other groups, organizations to work together. Funders see that as, I can give this group a little bit of my money and I can make a lot more impact because they're all working together towards the same goal.

So before you go out and start talking to people, think about who you would work with to get the work done. So think about groups that are like you that have similar goals or would directly benefit from your program. So for us, that was obviously the schools, teachers, counselors, administrators, principals, superintendents, people that care about the school climates and want to have a positive and healthy learning environment for their students.

And also was people like the boys and girls club in our local communities. They have kids after school and they certainly have the same challenges that teachers have in the classroom of keeping everyone happy and getting along. And they have with the boys and girls clubs,

afterschool programs, they have the same language that kids are learning in school about how to treat others well and how to respect people's boundaries and how to ask for consent when doing anything.

So if you can think ahead about some of those people that you might be able to work with and then talk with them about your goals, and maybe you'll find that you'll have some shared goals that you can then craft into a short story. So that when you do go out to approach people, whether that's through email or that's on the phone or in person, you have your story that you can start sharing and you're ready to have that conversation anytime, you run into somebody that might be interested in hearing what you have to say.

So here, this next slide is all about reaching out. And so Alycia talked about some of this about what has kind of worked in some rural communities. And I can kind of tell you our story now about how we got started and how this program ever came to be. So of course it all started with a person, this woman is the matriarch of a local family foundations. And we had been talking to her for a couple of years, she was really, she's first of all very interested in education. She cares a lot about kids and she wants to make sure that all kids have the same opportunities and she is really focused on healthy relationships, bullying, cyber bullying, especially in this day and age and just making sure that kids have healthy relationships.

So she was the first one we started just talking about how we've needed our own program. She then was able to connect with the Robert Wood Johnson Foundation. She had connections already there and they through their local funding partnerships program, she convinced them to come out to the state of Montana and do a tour, a site visits with a bunch of different organizations throughout the entire state. And our state is a very large, it's about 14 hours from east to west so it's a lot of drive time.

But she was able to get key people from that foundation to come out and do a site visit with us, where we were able to share our story. So we were able to tell them about the urban curriculum that we were using that wasn't working. And we were able to tell them about what we needed to create our own curriculum. And so after of course these things takes a lot of time as you all know, relationship building and fundraising is not a quick thing. It's many years.

So from that site visit to actually getting the grant was about a year and a half and we then worked with that grant coordinators at grant manager and throughout the three years created our curriculum, always providing feedback to them. And then to get the grant, I should step back and say to get the grant, we also had to have local funders, match funders. So we then had to reach out to banks in our community to other foundations across the state to other family foundations that this one that our original contact knew.

She helped us really create this spider web of people and connections for us. And so through all of those match funders that we then created our own relationships with that we still have to this day, we were able to get that grant. And then I'd say from then on out, as I said earlier, some of those foundations kind of waned their interest waned over the years. So we're always thinking about who's next in the pipeline to help us and kind of this slide kind of talks about where some ideas for getting those, for continuing to get people interested in what you're doing.

So, as Alycia said, the local community foundations, if you have a community foundation, connect with their executive director or someone on their staff. A lot of time there are people that are donating to the community foundations that want to remain anonymous but are very, very interested in the work that's happening on a local level.

So it's a great place to start, especially if you have a small staff in getting connected to people. Of course, obviously, local family foundations, they're really tight knit communities and they all know each other. So there's lots of different private family foundations and they all go to their own conferences and they all have their own phone meetings and they all network within themselves. So if you can find one, it will guaranteed lead to others.

Another important place that I've really had a lot of success at meeting new people is the state nonprofit associations. So the Montana nonprofit association has several trainings throughout the year, but then they also have an annual conference that I go to every year, and every time I go to the breakout sessions where there's funder speaking. They're looking for new programs to fund or they're looking for more ideas.

So, your program might not specifically resonate with them, but I guarantee you they'll know someone who will be interested in your program. And then of course all the training and support that nonprofit associations provide, they want you to succeed and they want to help you find other people to do the work with you. So they're a great resource.

So again, it's all about finding out who your tribe, other organizations, partners that you could work with, other colleagues, kind of create this spider web of people that in Montana we say it's a big, small state, whereas if you travel to one location, you'll find people that know somebody that you know, every single time. So just trying to reach out to as many people as possible can really increase your chances of finding the right people that want to help fund your program.

Sustaining relationships, so once you have those relationships in place, of course, face to face is always best. And I say that being in the fourth largest state in the union, so I understand that sometimes it's not realistic to be face to face with someone, if you can't be face to face with someone, pick up the phone. We all send and received so many emails per day, they're really easy to ignore. So if you just pick up the phone like Alycia said, sometimes sending an email at the beginning before you pick up the phone is great, give them a little bit of time to process but picking up the phone and I suggest when you call people, it's in the morning before people have a chance to get really into their days and stand up.

Standing up while you're talking on the phone is a really great strategy that I've used. It's a lot more relaxing and kind of takes a little bit of the fear out of it. One thing I've really found is that people love to be asked for their advice. So even if you pretty much know or if you have a really good idea of what the answer is or the path that you're going to be traveling, ask people for advice. They love to be asked for their opinion and that can help you in the relationship building and sustaining.

If you know what they like and what the advice that they've given you, you can connect back with them when that advice turns out to be great and works well. Also as Alycia said, frequent updates, make sure that they know what you're doing with their money and the difference that they are helping you make. Share stories, connect the funders with your staff, a lot of the times these grants are paying for people to have a job and to be employed.

So that's really powerful to let them know who are the people that they're keeping employed, who is doing this great work and how were they helping you to not only support your local economy by keeping people employed, but also by the changes that you're making.

Don't be scared to talk about your challenges and then your solutions to those challenges. We have one grant funder who always in our grant reports asks us, "What kind of challenges did you

have last year?" And that's a really great way to be able to tell people that it's okay, that you don't always succeed at everything.

And then some final thoughts, because I think I'm running out of time here is Alycia also alluded to this, that we can't compete with big city numbers and that's true. But I'm finding that more grantors are really interested on quality, not so much quantity. So it's not about the numbers of people but the quality of what you're doing. And again, yes, sometimes it's hard to get big funders' attention, help them see that your community, your small community can be a test site for big ideas.

We've got smaller groups of people to work with, but we can show big changes and we can show that, "Hey, this can work on a larger scale and we can do it quicker." It's expensive to travel and our communities are small, so if you do have the funding to travel make sure you get the most out of your trip. So here in Montana, we're always driving to one place, but then stopping to see three people on the way there and three people on the way back.

And funders really respond well to that knowing that you're using your money in a very conscious way. Limited local resources that there's few people and not a lot of them have a lot of money to give. I would say join the local active service groups, I'm a member of the Rotary Club and that's where all the movers and shakers are in our community.

So I can connect to other people there that no other people either in the community or outside of the community that might be interested in what I'm doing. And then also sometimes I have to travel 60 miles away to our big city to network and to meet some new people. And then as the final thing I'd say is that, in this work, you get turned down a lot.

And I think it's really easy to get discouraged but I would just encourage you that our work matters. The things that we're doing every day are making a big difference in our communities. And if someone says no, I encourage you to think that it's just, no, not right now. You can continue to talk to them and ask them again later.

So I think, I'm probably out of time but I'm more than happy to answer questions after this webinar and it would be happy to share more with anyone. Thanks so much.

**Paul Lindberg:**

Good morning everyone. It's good morning here in the cloudy and snowy Columbia Gorge region, we'd have been socked in with snow for about the last two or three weeks and we're supposed to get some more tight. So it's fun and games. But as my father would say, "It's a winter. What do you expect?" I am a Collective Impact Health Specialist, which is essentially a made up title for a community grant writer. And my work is paid for everybody always asks, paid for by Providence Hood River Memorial Hospital through a grant to the United way.

So basically what happens is the local hospital, one of our local hospitals pays me to write grants for other community organizations. In the process, we work, or sorry, I help identify community needs, convene community partners to help design interventions and initiatives. And then it's my job to look for funding and then secure funding. And over the last five years, we've brought in almost \$10 million and outside grants.

And I would have to say this, none of that money has gone to providence, it's all gone to community partners and we're addressing issues, social determinants of health, food security, affordable housing, jobs, transportation as well as some medical conditions, chronic health conditions, mental health, dental health. And then we also are working on or I'm working on as a community partner that gap between the healthcare sector and social service sector, and

really trying to get each one of those sectors to recognize and identify where their clients or their patients' needs are occur outside of their particular sector.

For example, our healthcare sector has started to really recognize that there are conditions that occur outside of the clinic walls that impacts their patients help. And so that sector has really stepped up in helping identify needs and more than just recognizing that they exist, they're starting to put some funding towards those things as well. So that's a pretty significant move for us and a lot of my work happens to fall into that gap of trying to get those two partners together to agree on particular interventions and then go again and find funding for that.

So that's a little bit of my background. I don't work for a particular organization, like Kelly does, so I'm kind of a utility infielder, if you will, I work on a lot of different issues and read a lot of different grants. And so sort of diving into, first of all, I agree with everything that Kelly said about relationships with philanthropy and what you need to do to make those successful. And really the first thing in my opinion is to find out, is to clearly identify what you as an organization or as a community, depending on how you're working is.

What do you guys need, not what the funder may want, the last thing you want to do is get fall into that trap of chasing funding simply because there's money available and it may be useful to you. If you can set a plan like Kelly said, with two to three goals and then stick to that and write it down, writing it down is very helpful because then you can also share that with a particular funder. And say, "Hey, we've looked at this, we've been thoughtful about what we need and how we're going to get there," and here it is.

So that strategic plan or that priority list is really important. And in our case, our winning formula so far for that, for securing that funding has been, we have developed community identified needs, we've done a collaborative needs assessment three times now over the last seven years or so.

And really it's 30 plus community organizations come together to put this need assessment together mechanically, questions to what questions do we ask, and how do we get it distributed and then get it collected. And then we also have a significant community member input into that process as well, both at the beginning in terms of what questions we ask and how those questions get asked and then how we prioritize.

So for example, our last community health assessment from 2016 had the assessment itself identified 27 or 28 community needs as identified by over just about 2000 community members. And again, there were 40 or so agency partners who provided feedback as well. So we had 27 or 28 needs that were identified and then we gave that list to a community advisory council, which includes community members and agency partners and they prioritize it to 10 needs.

So that's our community health improvement plan and I basically call that our top 10 list. And it includes those three categories I mentioned before, the social determinants of health, some physical conditions, and then that healthcare ecosystem and we're broadening that definition as well. So that has been, and then we take that needs list, that health improvement plan and then my job is to basically connect with community partners who are addressing those needs and then help them facilitate conversations around designing solutions that address those needs.

And this gets into a little bit of what Kelly was referring to in terms of finding of collaboration. Every project that I work on is collaborative by definition it has to be, in order for me to work on a project that has to be at least two, if not three or more partners. And so we have those other organizations engaged from the very beginning. And the other key piece to what we do is we try

to include that consumer voice, those folks who are most affected by the condition we're trying to address.

But let's find out what they need and what they think and what they want. So in addition to the organizational collaboration, I would also encourage you wherever possible to include that consumer voice or that community member voice as well because that's a really strong component that we have found that philanthropy is the national or state or local, they really respond to that.

That's if you can point to something and say, "This is what our community members say they need and want," then that's going to be a success. They're going to respond well to that. Kelly covered much of this in terms of the reaching out to philanthropies, figure out what their priorities are, what they fund. Look for some or similar organizations across the state or across the country depending on the philanthropy to see, do they even fund this and if so, how much did they typically give to these types of organizations or these types of projects?

The idea of making personal connections with staff, I try to do this and Kelly reiterated this and sort of Alycia, it is to me it is one of the most useful and powerful tools I have to learn about a foundation. It doesn't mean I'm going to get money from them, but it helps, it gives me insight to what they're interested in funding. And one example of that is in a conversation after one of the state conference that I attended, one of a program officer from a mid-sized state foundation said, "We have a soft spot for organizations that are the only resource in a particular rural community."

And I haven't had this happen to be working for children's museum at the time. And that just little tidbit of information has helped inform how I approach them in making grant applications, emphasizing that point. We're the only ones in the community who do this and if you don't fund us, then nobody else is going to do it.

Again, the idea of connecting with them afterwards and continuing that relationship through phone calls or emails and making sure that your intent with those phone calls and follow up emails is not to be asking for anything. It's simply providing them information so they have a better understanding of the work that you're trying to do. Specifically for national philanthropy, a couple of things that I've learned is many often use intermediary partners for the place based grants, place based grant meaning for example Robert Wood Johnson, it's rare. And Kelly's organization clearly got one, which is great, but it's rare for them to fund a specific initiative in a specific community, especially if it's a small rural community.

So they often use intermediaries to make big grants and then have those intermediary organizations manage a program and distributes funding in a different way or sorry, in a more local way. And so if you're looking at Robert Wood Johnson for example or the Kellogg Foundation or one of those national philanthropies, pay attention to when they're offering up an RFP. And if it doesn't look like it's a fit for your particular organization or your idea, follow, go back to that website and see who got the grant and then follow that organization and see if they're going to distribute that money.

It's that idea of following the money and I know it sounds somewhat, it's a long game and it kind of sounds like it's a lot of research but it can really help you identify who some of those national partners are, national providers are that those national philanthropies then partner with. So you kind of building that spider network as Kelly referred to. For the state foundations. Again, the personal relationships identify common priorities, not going to lead to direct funding.

One key thing in state and regional foundations is, they will know as much if not more about the field you're working in as you do because they are in contact with other organizations that are doing same or similar work. And so they will have a much broader lens about what's going on. And so it will really be beneficial for you, if you also know who else is doing the work. It has occurred in the products that I've worked on several times where a program officer will say, "Hey, do you know about so and so organization down in bend or wherever?"

And if I have this blank look on my face, I always feel a little sheepish because I feel like I should know even if I'm not going to partner with them, I should know at least two wells is doing the work. So I can respond to those types of questions if they come up. That also helps me when I'm looking at designing initiative or putting a program together, I can call that other organization that had heard of and say, "Hey, Ford Family Foundation mentioned you guys are doing this work. Tell me about what you're doing."

We're doing something similar here in the Gorge and so it tends to build that network as well. Tips for community philanthropies, the one thing to move or to a little deeper as to what Kelly mentioned, there are community foundations they often do have anonymous donors who want to give them the community. They also have typically, they'll have two pots of money that they run their grant applications past and that is sort of their general fund. But then they also have donor advised funds and those donor advised funds are basically smaller amounts of money that individuals or families have put into that foundation to have them manage the money, but then manage a grant process.

And each one of those donor advised funds has their own set of priorities and interests that they like to fund. And so what typically happens if you submit an application to the donor advice fund or sorry to the community foundation, they will check that against their priorities for the general fund but then they'll also check it against the priorities for all of their donor advised funds. And for example, the Oregon Community Foundation, big statewide community foundation and it's one of the top 10 size wise across the country.

They've got, last I heard is they've had 13 or 1400 donor advised funds and many of the grants that we get from them come from those donor advised funds. By contrast, the Columbia Gorge Community Foundation, which is a local community foundation, they have I think about 50 funds. And so same concept but on a much smaller scale. If you can talk to one of the Community Foundation's program staff and get a list of who those donor advised funds are, some may share it, some may not.

That can give you some real insight as to who may be interested in funding your project not only across the state but in your particular community or region that you didn't know had the ability to do that. Special considerations for rural communities, Columbia Gorge is a five counties, 75,000 people in an area about the size of the state of Connecticut are small as has been mentioned, are small populations, greater barrier. And collaborating with other organizations or other communities to increase that population impact is always a good idea. It's not always easy to find other communities who are doing that work.

One place that you can look for some other communities that might be doing this work in addition to the Rural Health Hub here is the Robert Wood Johnson Foundation, they have a culture of health prize that the award every year and there are some rural communities in there and they give up their website, gives a pretty good description of those communities and that's a kind of a good place to start to try to find some other communities that are doing good work.

Moving through here, looking at the time. One thing that I was trying to do recently in the last couple of years is to lean into that small population barrier, because there's no way to get around that. I mean, if we're just going to write a grant for our community, there's no way to say that our 75,000 people or the 12,000 people who run Medicaid here is a large enough population. But because of that, the argument goes, we can focus more on the individual and family and have a deeper impact.

And even I would argue we can make the community and make individuals healthier because we can put more focus and energy into each individual. So that's my argument for getting around that population barrier and trade a national profile using social media. I know that sounds a little corny and a little odd in Instagram and Facebook and all of that, but these foundations, their staff, they do Google searches and whatever comes up, it's going to come up.

So if you have more the better I would say, and then facilitators of success, really it's good research, know what you're asking for and know if a philanthropy can actually fund it, not whether they will or not, but just whether they can, does it fall into their wheelhouse.

And if you are funded to do a good job that reflects on everybody else. And really one of the biggest lessons again to reiterate to what Kelly said, don't take rejection personally. It is not about you, it is simply about and it's not even about your project. It just means it didn't fit their interests or it didn't fit it strongly enough for them to fund it.

And do really, you can follow up and call and ask if they haven't any other input as to why it wasn't funded. Some will respond and some will don't have anything to add other than just a simple rejection. But don't take it as, "Oh, our project is terrible. We're going to stop doing it." Just keep plowing forward because as Kelly said, this work is good and it is important. And I think I'll stop there and allow some time for questions.

**Kristine Sande:**

Great. Thanks so much. I think that's a really great insights, and I really appreciate their input. So at this time we're going to open the webinar apps or questions. You will see a Q&A box on the lower right hand corner of your screen and that's where you can answer your questions for our panelists today.

And as you enter those questions, we do ask that you submit those to all panelists so we don't miss your question. And we do have one question here to start that came in while our presenters were speaking. And that question is, what is your experience in identifying funding for staffing and administration? Most funders seem to want to fund direct concrete projects, but we need more support for staffing and administrative costs.

So Paul or Kelly, any thoughts on that?

**Paul Lindberg:**

Oh, I can jump in just briefly. I would agree that that's the most challenging type of funding to get from a funder, and one thing that we try to do is connect whatever that administrative work is. And if it's a program staff try to connect the dots between what the work that they're doing and the impact that they can have your clients as much as possible. And kind of try to lean it into a program that's a program costs close to a staffing cost.

Having said that there are some funders, although there are few and far between that are willing to fund capacity building and just fund staffing. And the key with staffing, no matter what they call it or what anybody calls it his, is sustainability. How are you going to keep paying for this staff person after the grant goes away?

And other than buying power ball tickets, if you don't have a sustainability plan that's going to be an issue for any funder on that particular area.

**Kristine Sande:** Great.

**Kelly Heaton:** This is Kelly and I agree with everything Paul said, it is the hardest funding to find, but at the same time I feel like funders are starting to get that point and get the message that I always repeat over and over again is that we can't have a program and we can't have a project unless there's people working to create, sustain and deliver that project or program.

And another thing that I try to do is, and again this is having multiple sources of funding is, reaching out to more people is trying to write grants in a way that shows that I have funding from another group or other individuals and I'm just asking this grantor for a portion of those full-time or those FTEs. So for those staff members, so that they can see that I'm not asking them to pay the entire burden. I'm asking them to be a partner with others who also find this work meaningful to make it happen so that we can employ people to deliver these great programs and to continue to keep doing the great work.

**Kristine Sande:** Okay. Thank you. And you both mentioned sustainability in your previous answer. So this question ties into that and it's basically asking for suggestions around sustainability since it's always an issue and something that funders want to know about what your plans are, so thoughts on that.

**Paul Lindberg:** I started recently and I've used it in three applications so far in the last three or four months and only one has come back. The other two I haven't decided yet, but what we did is, is pitch the idea as a multi-year grant, three-year grant with the idea of sustainability being you as a funder and need to help us pay for this for three years. And in that process, we will create a sustainability plan and we will dedicate some time or some money that you're giving us to help create that plan. And the one funder said that sounds like a really good approach to us from their perspective, they were funding both the program piece and helping us or giving us a chance to figure out that sustainability over a period of years as opposed to that 12 months to sort of typical 12 months application.

So we're going to start to build in that idea of creating the sustainability plan in each application we submit. And so we don't necessarily have to have it at the outset when we submit the first grant, but hopefully we'll have it after three years.

**Kristine Sande:** Great. Thank you. All right, this next question is, do you have any suggestions for how statewide organizations can work with community based or health conversion foundations? The difficulty is in designing specifically how residents and the foundation's geographic area benefit from statewide initiatives? Anyone have thoughts on that?

**Paul Lindberg:** One thing that we have done is try to work with the state, this Oregon Health Authority to try to identify what who lives where and who would be receiving services in a particular geographic area, or who has the most need, let me put it that way, basically who are Medicare members in a geographic area. And then looking at the foundations geographic area and trying to start to do some math around, "Okay, well who are we going to serve that's in this particular funders geographic region?"

We have an issue here in the Columbia Gorge because we are two states, we're Oregon and Washington and most foundations, most private foundations don't fund across the river. And so we have to be very careful about identifying who really gets the services and where they get

them and what the impact is. So we just try to get as much sort of population need based information as we can to make those distinctions.

**Kristine Sande:** Great. Thank you. Next question is, what is your experience in securing funding for what may be considered a capital project? Being part of a rural hospital with thin funding at times, there are always needs for facilities that need to be met. So, thoughts on how do I find that capital funding from foundations?

**Kelly Heaton:** This is Kelly. So this is something that I also have found is hard to find foundations that want to specifically fund capital projects. However, there are a few out there and I think that, at least in our region that has been, we've had some success. I'm on the board for our rural hospital as well.

So we've had success with one of the larger banks, their foundation, they will support capital projects and then they in turn were able to introduce us to others who also would support capital projects. But yes, that's always a big challenge.

**Paul Lindberg:** And just one quick specific idea there, the USDA has a community, I just looked at it the other day. A community center, capitol building project fund, pot of money. So check the USDA for your particular state and then see if they've got this fund available and then there should be a contact person listed for the region in your state and then ask them about it. But they do have money specifically for building projects.

**Kristine Sande:** Great. That's a great tip. And I would also mention that the Rural Health Information Hub has a topic guide on capital funding, so that's another place that you could look for ideas of foundations or other funders who might be interested in funding capital projects. And one last question here, related to evaluation says many funders have specific metrics which needs to be met to qualify for funding.

In some circumstances, if an organization is successful, it no longer qualifies for funding because it no longer represents a population with the greatest need, so that's a major challenge. I don't know if there's a question there exactly, but any thoughts on that?

**Kelly Heaton:** I guess one thought that I had is, evaluation is kind of an interesting animal. We, as we're providing services to victims of domestic violence and sexual assault where we're asked by several funders, is it quote working? And that is extremely hard to answer because each person is different and each person has a different experience and their own set of challenges and opportunities. I guess I would say that for us, we try to focus less and this kind of goes back to what I was saying about quality over quantity.

We're trying to focus less the number of people that we served, but the quality that we were able to provide services that we were able to provide those people with. And I understand what you're saying about if you were provide all the support and services then you are in a sense decreasing the need but I guess I would challenge the funders back to say that, it's something that, at least in our case, especially it's something that never goes away completely.

And it's something that are, society continues to condone and support and allowed to happen. I think with evaluation too, I think we need to keep challenging funders to think about letting us decide what success means. A lot of times, again, with our victims, somebody what they feel might be success for one of them is not the same for another person.

And so letting the people that are providing the services or providing the programs define what success means. And sometimes that's through a lot of storytelling and how one specific person has reached goals and successes and another person doing the same thing or having challenges.

**Paul Lindberg:**

Just to jump in, and I could not agree more with challenging the funder to say, and I would say, "Hey look, look at what we've done together. We met these metrics that you've set out. Isn't that fantastic? What a great partnership we've got more needs, how about you give us more money to address more of these needs?" And then work with them to define like Kelly was just saying, "Well, on the ground, we see that maybe this particular need isn't quite as great in numbers or in depth, but now we know that this one is a need. So how about you help us address this one next? We've clearly done a good job. You liked our work, we trust you, you trust us. Let's get after this next thing together."

I am a firm believer in challenging foundation because well, I'm going to get on a rant but I'm trying to change the entire foundation funding model all by myself, but it sounds like others are doing the same thing. So that's great. Challenge those funders wherever you can.

**Kristine Sande:**

Oh, thank you, that was so great strategies there. And I think at this point we'll wrap up the webinar since seeing as we're over time a bit. But again, thank you to our speakers for sharing your vast experience with us, I think this has been really educational today, and thank you also to our participants for joining us. A survey will automatically open at the end of the webinar. We encourage you to complete the survey to provide us feedback that we can use in hosting future webinars.

The slides used in today's webinar are currently available at [www.ruralhealthinfo.org/webinars](http://www.ruralhealthinfo.org/webinars). In addition, a recording and transcript of today's webinar will be made available on the RHI Hub website and send to you by email in the near future, so that you can listen again and share this presentation with your colleagues. Thank you again and have a great day.