

# Grantmaking Program Plan 2020

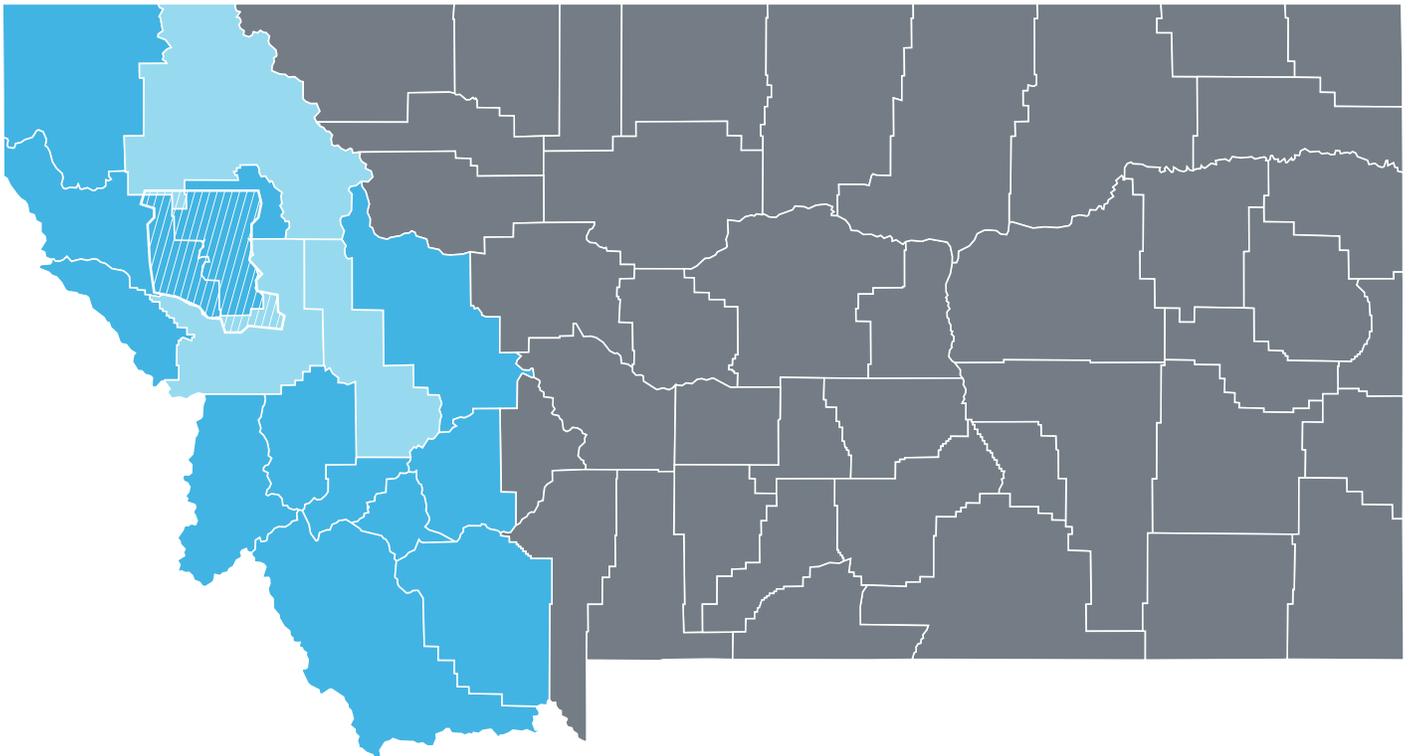
*Reducing social and economic barriers to Western Montanans' health and wellbeing, particularly for families living in poverty and American Indians*

## GENERAL ELIGIBILITY CRITERIA

- Must provide majority of their organization's services in our funding region (see map below);
- Must be a tax-exempt public charity, as qualified by the IRS;
- Applicant's work must align with the mission, vision, values of Headwaters Foundation;
- Headwaters prioritizes organizations serving those living in poverty and American Indian constituents; and
- Headwaters will consider the applicant's past history in successful project completion and tracking outcomes.

## HEADWATERS FOUNDATION'S SERVICE REGION

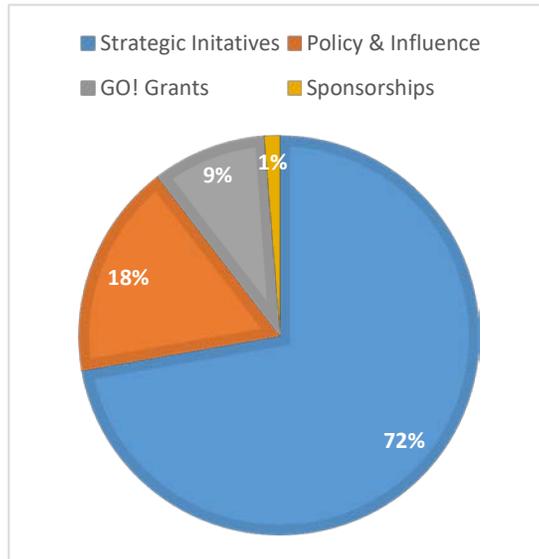
Headwaters Foundation serves the 15 most western counties in Montana and the Flathead Indian Reservation. Counties served include: Lincoln, Flathead, Sanders, Lake, Mineral, Missoula, Powell, Lewis and Clark, Granite, Ravalli, Deer Lodge, Jefferson, Silver Bow, Beaverhead and Madison.



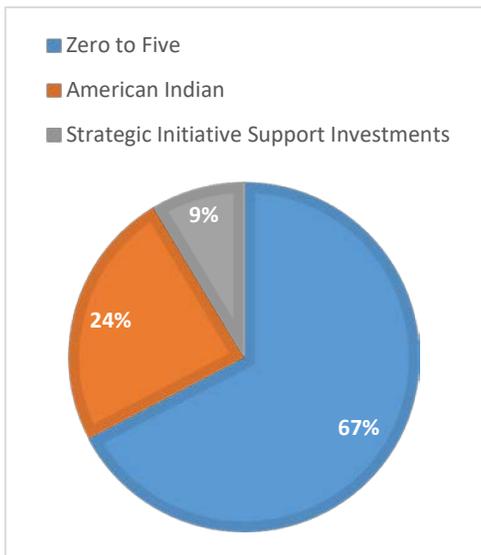
## 2020 GRANTMAKING STRATEGY

In 2020, we will invest more than \$4 million into community-driven solutions to reduce social and economic barriers to western Montanans' health and wellbeing—particularly for families living in poverty and American Indians—through four grantmaking programs.

- 1) Strategic Initiatives: \$3,120,000
- 2) Policy & Influence Fund: \$750,000
- 3) GO! Grants: \$400,000
- 4) Sponsorships: \$50,000



### STRATEGIC INITIATIVES FUND



Fund Amount: \$3,120,000

The focus of this fund is to build community capacity to collaboratively reduce social and economic barriers to health for western Montanans. This fund is currently comprised of two initiatives and also includes \$270,000 for capacity-building efforts that support the initiatives and overall mission of the foundation.

- Zero to Five: \$2,100,000
- American Indian Health & Wellbeing: \$750,000
- Strategic Investment Supports: \$270,000

## **Zero to Five Strategic Initiative**

**Total Fund: \$2,100,000**

### **Strategy: Locally-Driven Collaboratives**

Headwaters will provide multi-year funding to a select number of **locally-driven, innovative, multi-sector collaborative groups** working to advance opportunities for children ages 0-5 in western Montana. They work to create conditions in their communities that support healthy pregnancy, resilient parenting, or school readiness. Their work goes beyond service delivery to address the underlying conditions preventing children from reaching their full potential. These collaborations are made up of a cross sector of organizations and businesses in the community, with diverse representation that may include early childhood education providers, business leaders, hospital and healthcare leaders, the faith community, school districts, and parents and caregivers. The collaborative will work to include those context experts with lived experience at every stage of the work, empowering them to guide the efforts for their own community.

### **Strategy: Statewide Office**

The Zero to Five Statewide Office serves as a central go-to resource on early childhood in Montana, acting as a strategic coordinator for research, policy, and advocacy on early childhood systems; additionally, it provides technical assistance to the local collaboratives in western Montana that are focused on finding solutions to support children and families in one of three key focus areas: healthy pregnancies, resilient parenting, or school readiness. Headwaters funds a statewide program office, (through fiscal sponsorship of Intermountain) to perform the following roles in the Initiative:

- Develop and implement a statewide policy agenda and advocacy plan;
- Develop a Theory of Change and evaluation framework;
- Support data and knowledge sharing across communities;
- Develop and implement a communications campaign that emphasizes the value of investing in children in their earliest years;
- Leverage additional funding for Zero to Five; and
- Develop public/private partnerships in support of early childhood in the state.

Proposals to this fund are by invitation only. To learn more about this Initiative and whether your organization is a fit, please reach out to Erin Switalski, program director, at [erins@headwatersmt.org](mailto:erins@headwatersmt.org).

## **American Indian Health & Wellbeing Initiative**

**Strategy: Invest in community-led solutions to improve health and wellbeing for American Indians**

**Total Fund: \$750,000**

Through this developing initiative, Headwaters will support community-driven solutions to reducing health disparities and improve health and wellbeing of American Indians in western Montana. Headwaters believes that community members are intimately knowledgeable about the relationships and barriers in the community, and are therefore most adept at identifying stakeholders, leaders and collaboration opportunities within a complicated cultural and political environment. Funding will focus on geographically within the Headwaters service area where American Indians are most affected; this includes both rural and urban, and on and off the Flathead Indian Reservation.

Headwaters will fund a variety of organizations that serve American Indian populations, as determined by the

initiative priorities. Organizations receiving funding through this effort will demonstrate one or more of the following:

- A commitment to tribal and non-tribal collaboration as a means to promote entire community well-being
- Innovative, culturally appropriate approaches that include the entire community
- Priority of projects that include a youth development and skill-building component
- Focus on systems-change and prevention
- Commitment to indigenous knowledge-based evaluation and learning
- Commitment to effective outcomes

Proposals to this fund are by invitation only. To learn more about this Initiative and whether your organization is a fit, please reach out to Aly Schock, program officer, at [alys@headwatersmt.org](mailto:alys@headwatersmt.org).

## Policy and Influence Fund

**Strategy: Improve health in Montana by making democracy work through engaging everyday Montanans in decisions that affect their lives**

**Total Fund: \$750,000**

Through this work, Headwaters seeks to strengthen infrastructure for community-driven policy to improve health in western Montana. We will do this by funding organizations and networks working to engage everyday Montanans in driving policy solutions that reduce social and economic barriers to health. Priority funding strategies include: leadership development, capacity building, grassroots organizing, convening, advocacy, and research that supports policy. In 2020, Headwaters will focus on funding organizations, community organizing efforts, or networks focusing on affordable housing or revenue generation needed to address upstream health issues for western Montanans.

Proposals to this fund are by invitation only. To learn more about this Initiative and whether your organization is a fit, please reach out to Erin Switalski, program director, at [erins@headwatersmt.org](mailto:erins@headwatersmt.org).

## Capacity-Building Support

**Strategy: Support capacity-building efforts that strengthen Headwaters' grantees**

**Fund total: up to \$270,000**

In order to make the broad-based systemic change we seek, Headwaters acknowledges that our investments alone will not be enough. However, we can increase our overall impact by making strategic investments in capacity-building efforts that strengthen the overall sector in which we operate. Through this fund, Headwaters supports three key capacity-building efforts in 2020 that contribute to the overall success of our other investments: 1)

Capacity-building for the field through a partnership with Montana Nonprofit Association; 2) Trust-based Philanthropy Project; and 3) Kaiser Health News Partnership.

\*Headwaters does not accept proposals for this fund.

## GO! Grants

**Strategy: General operating grants to build the resilience of children (ages 0-18)**

**Fund total: \$400,000**

Through this fund, Headwaters will offer grants of up to \$5,000 in general operating support for nonprofit organizations working on the ground in western Montana's most rural communities to promote healthy lives for children and families. To qualify for funding, an organization must be working rurally, serve families experiencing poverty or American Indian communities, and demonstrate that the bulk of their work is aligned with the following strategic focus areas:

- ***Health and wellness for youth*** (including development programs, school-based wellness centers, access to healthcare, and behavioral health early interventions)
- ***Food security*** (including access to healthy food)
- ***Housing support for families*** (including quality of housing)
- ***Early Childhood support, ages 0-5*** (including early childhood education, childcare access, maternal health, and resilient early parenting)
- ***Environmental factors that affect health*** (including transportation, built environment, personal security, and neighborhood quality)

\*Applications are accepted online through our website on a first-come, first-served basis until funds run out. Headwaters defines rural as area outside the cities of Butte, Kalispell, Helena, or Missoula.

## Sponsorship Grants

**Total Fund: \$50,000**

**Strategy: Supporting events that build the resilience of children and families by addressing social determinants of health**

Through this fund, Headwaters accepts requests up to \$2,500 to support fundraisers and events of organizations whose mission aligns with our strategic focus of building resilience for children and families in western Montana. Headwaters will prioritize organizations serving children and families with low-incomes or American Indian constituents. We generally do not fund conferences.

\*Sponsorship requests are accepted online through our website on a first-come, first-served basis until funds run out.

## What we don't fund

Currently, our grantmaking programs exclude funding of the following categories:

- Individuals;
- Endowments;
- Direct lobbying;
- Debt retirement, operating deficits or after-the-fact support;
- Basic biomedical research, drug therapies or devices;
- Public, Private or parochial education institutions, including their foundations, except when support is essential to programs or projects that align with our Strategic Framework and are not considered standard educational services;
- Organizations or projects that unlawfully discriminate with regard to employees, volunteers, delivery of programs or services, or clients served based on age, sex, religion/creed, race, color, national or ethnic origin, sexual orientation, gender identity or expression, disability, marital status, military or veterans status, pregnancy or genetic information; and
- Any organization or project that is inconsistent with the mission, vision, values and Strategic Framework of Headwaters.