HEADWATERS FOUNDATION
2021 GRANTEE NEEDS ASSESSMENT
ORGANIZATIONAL CAPACITY & LEADERSHIP DEVELOPMENT

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EXECUTIVE SUMMARY

As a community-driven foundation, Headwaters strives to listen and respond to the needs of the communities they serve. During Spring 2021, Headwaters commissioned a team of researchers based at the University of Montana to conduct a needs assessment to identify the challenges and priorities among grantees related to organizational capacity, advocacy, and community leadership. A secondary aim was to identify a range of potential activities or strategies that Headwaters could implement to support grantees and other organizations working in Western Montana.

A total of 98 grantee representatives were identified by Headwaters staff and invited to participate. Eighty-eight (88) grantees completed at least some of the questionnaire for an overall response rate of 90%. The needs assessment included a section to understand organizational characteristics and then assessed barriers and facilitators under four primary areas including: 1. Organizational Capacity; 2. Advocacy; 3. Community Leadership; and 4. Collaboration & Networking.

Below, we list the top needs and priorities identified under each of these areas.

1. **Organizational Capacity**
   Capacity was defined as the time, skills, resources, and support needed to successfully engage in or complete an activity. Grantees identified the following six areas as those with the most room to grow in terms of organizational capacity.
   - Recruiting and retaining staff and Board members
   - Fundraising and grant writing
   - Working with public officials and policymakers to address social issues
   - Marketing and advertising to increase public awareness and knowledge
   - Evaluating and communicating the impact of their work
   - Community engagement including volunteer recruitment, engagement, and coordination

2. **Advocacy**

Almost all grantees (87%) expressed a strong or moderate interest to engage in more advocacy work. Approximately one-third to one-half of all respondents indicated a strong interest in receiving training in the following advocacy activities:

- Website development and maintenance
- Media engagement, including social media, TV, radio, and print media
- Hosting an educational or informational session or event
- Developing print materials such as flyers, posters, fact sheets, or reports
- Engaging with local legislators, public officials, or policymakers

The most common barriers to advocacy work include:

- Limited staff time
- Lack of funding to support advocacy efforts
- Limited staff skills or knowledge about effective advocacy
- Concerns about 501(c)3 compliance

3. **Community Leadership**

The majority (80%) of grantees feel that they are very well to moderately equipped or prepared to act as community leaders on issues that are important to them. Respondents identified a range of community goals, with the following issues being prioritized:

- Diversity, Equity, & Inclusion
- Basic need fulfillment
- Reduced stigma of mental illness & innovation in crisis response
- Collaboration & meaningful connection
- Health, conservation, & sustainability
- Dignity, life sovereignty, & belonging
- Prioritization of families & children

The most significant barriers impeding the achievement of these community-wide goals included:

- Lack of financial resources
- Lack of coordinated efforts across multiple organizations
- Lack of community recognition that these issues are important
- Lack of resources related to infrastructure
- Lack of human resources – too few people working together, too few investments in social and human capital

4. **Collaboration & Networking**

Most (75%) of grantees are members of an advisory council or something similar and 61% of grantees are currently engaged in coalition work or they are members of a community impact group, although one-quarter (25%) are not.

Many grantees expressed a desire to work more collaboratively or to be in more direct conversation with other Headwaters' grantees. The reasons for wanting more communication and collaboration opportunities include:

- Sharing best practices and lessons learned with one another
- Learning more about what other organizations are doing
- Sharing resources
- Discussing barriers and brainstorming potential solutions together
- Implementing ways to support each other

In the following report, we summarize the findings and contextualize the quantitative survey results with quotes from individual respondents who provided more information and insights as to the challenges they face and their plans for making progress in achieving their goals. In several instances, specific recommendations are made for how Headwaters Foundation may take action to address these needs and to support ongoing efforts.

INTRODUCTION

In March 2021, Headwaters Foundation enlisted researchers at University of Montana's Center for Children, Families, and Workforce Development to conduct a needs assessment among Headwaters' grantees. As the first ever Headwaters Foundation Grantee Needs Assessment, the purpose of this activity was to assess the needs, priorities, and gaps related to organizational capacity, advocacy efforts, and leadership development needs among grantees. Further, the project sought to determine if and how Headwaters could implement new activities or strategies that support their grantees in addressing the needs and gaps identified.

The needs assessment was designed to answer the evaluation questions, listed below:

1. What are the primary needs related to organizational capacity, advocacy, and leadership development among Headwaters' grantees?
2. What are the primary barriers identified by Headwaters' grantees related to organizational capacity, advocacy, and leadership development?
3. What are the primary needs expressed by grantees related to their desire to be in communication with one another, and which venues for collaboration are prioritized?
4. Do organizational capacity needs vary by organizational characteristics (grantee type, organizational longevity, number of employees, etc.)?
5. To what extent do grantees perceive barriers or lack of access to leadership development opportunities and advocacy training?

The following hypotheses were identified and assessed:

1. Organizations with more staff report having greater capacity to complete activities.
2. Organizations that have been in existence for more than 10 years report having greater capacity than organizations established within the past 10 years.
3. Organizations led by Black, Indigenous, and/or People of Color (BIPOC) individuals and those serving reservation communities express different needs compared to white-led organizations working in Montana's more urban centers.
4. Organizations serving small and mid-sized rural communities and those serving reservation communities express different needs and priorities compared to those serving Montana's larger more urban centers.

In the following report, we answer these questions, provide insights on whether these assumptions hold true, and summarize the survey findings by describing the needs and priorities identified by grantee representatives.

DATA COLLECTION

The needs assessment data collection process consisted of a web-based survey which took approximately 30 minutes to complete. Grantees who were invited to participate received an email with a link to the online survey. The email invitation expressed that participation was voluntary and that respondents could choose to skip any question. It was expressly stated that participation in the survey would not affect funding from Headwaters and that individual responses would not be shared with Headwaters staff.

The web-based survey launched on April 6, 2021. Non-responders were sent two reminder emails, one each on April 9th and April 14th. Survey data collection concluded on Friday, April 16, 2021. A total of 98 grantee representatives were identified by Headwaters staff and invited to participate. Eighty-eight (88) grantees completed at least some of the questionnaire for an overall response rate of 90%. No incentives or compensation were provided to those who participated.

The survey is organized into five (5) sections, including:

1. Organizational Characteristics
2. Organizational Capacity
3. Advocacy
4. Community Leadership
5. Collaboration & Networking

Below, we provide an overview of findings from each of these main sections.

ORGANIZATIONAL CHARACTERISTICS

Respondent Characteristics

Of the 88 grantee organizations who participated in the needs assessment, 58% represented organizations funded through the GO! Grant, 16% are Zero to Five grantees, 11% are funded through Policy & Influence, 9% received Capacity-Building grants, and 6% are funded through the American Indian Health & Wellbeing program. Almost 34% of organizations have been in existence between 21 and 49 years, with about one-quarter (23%) operating between 4 and 10 years. Approximately 7% of grantee organizations were established within the past 3 years.

Funding Category

- Capacity Building 9%
- Zero to Five 16%
- Policy & Influence 11%
- American Indian Health & Wellbeing 6%
- GO! Grant 58%

Organizational Longevity

- < 1 year 1%
- 1-3 years 5%
- 50+ years 18%
- 4-10 years 24%
- 21-49 years 34%
- 11-20 years 18%
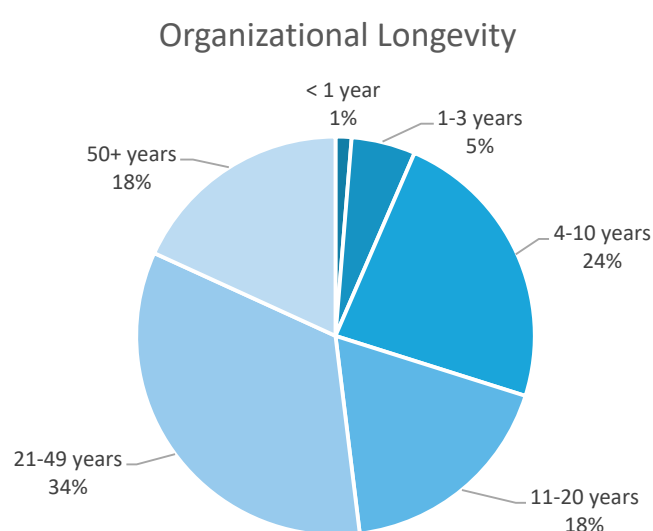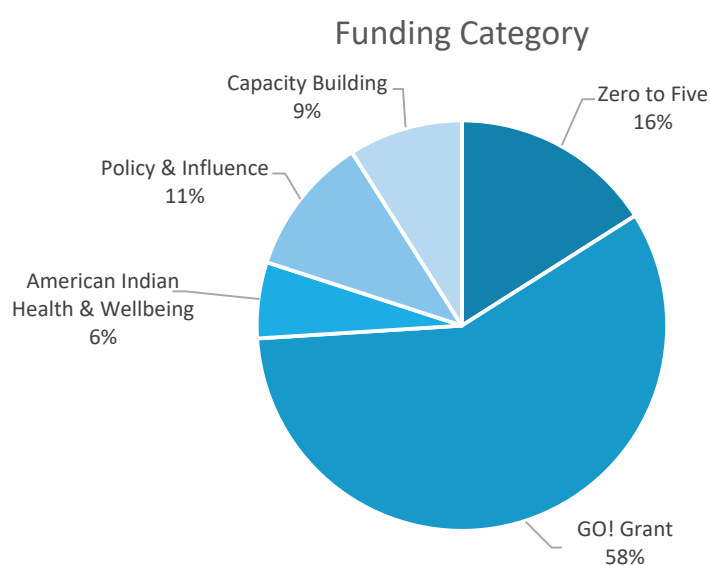
The majority (82%) of respondents completing the survey report their race as white, 11% of respondents are American Indian/Native Alaskan/First Nations, and the remaining 7% reflect respondents who are Latinx/Hispanic or who report multiple races. The majority (61%) of respondents who completed the survey are the Executive Director or CEO of their organization. Other organizational representatives included: programmatic directors or coordinators (11%), development or fundraising staff (9%), or some other position (16%) which was primarily comprised of Board of Director members. Seventy-three percent (73%) of respondents have worked for their organization for at least 4 or more years.

Respondent Race & Ethnicity

Other / Multiple Races
7%

American Indian
11%

White
82%
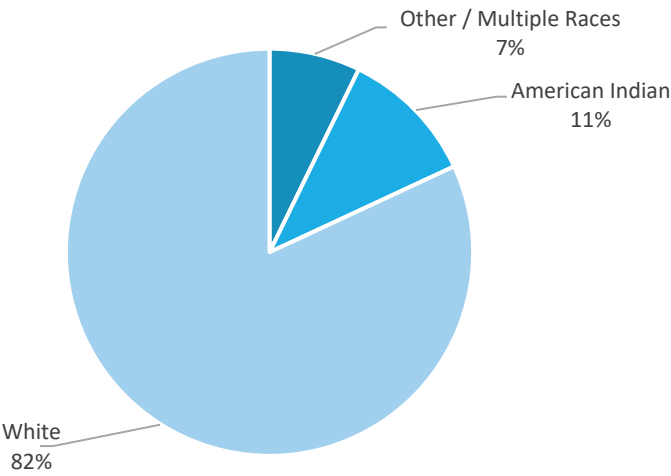
Staff

Almost 12% of responding organizations have no paid staff and are run completely by volunteers. The majority (59%) of grantees are small businesses with between 1 and 10 employees. Thirteen percent (13%) are large businesses with 51 or more paid staff. Among all respondents, 66% employ a majority of their staff at full-time status, while 24% report that most of their staff are part-time workers.

Staff Employment Status

Volunteers
10%

Part-Time
24%

Full Time
66%

Number of Employees

51+
13%

31 to 50
1%

21 to 30
5%

11 to 20
10%

All Volunteers
12%

1 to 10
59%
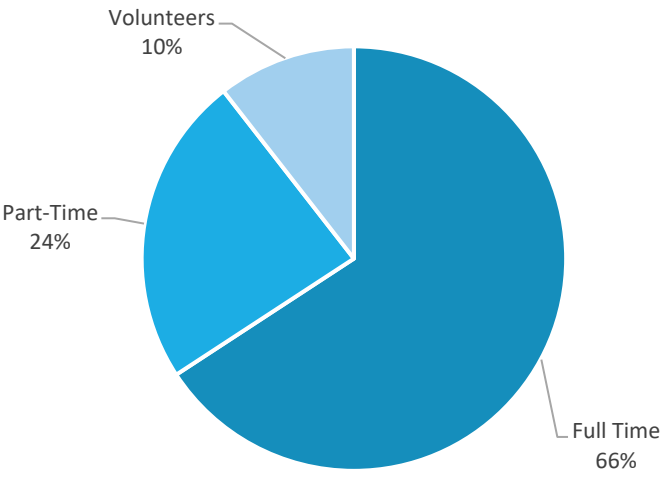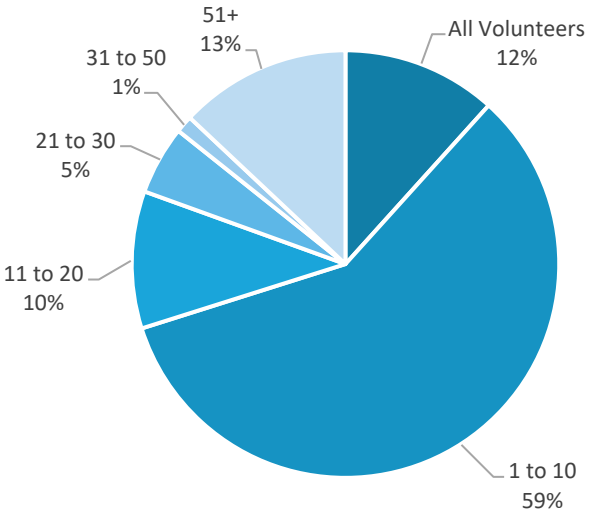
Community

Although all grantees are located in or support communities in northwestern Montana, organizations work in a variety of settings. Nearly half (44%) are in larger communities with more than 10,000 residents, 29% are located in mid-sized communities with between 3,000 and 10,000 residents. Almost 15% are in small, rural communities with fewer than 3,000 residents and 12% are in communities on American Indian reservations in Montana.

Community Type

American Indian Reservation
12%

Small Rural Community
15%

Mid-size Rural Community
29%

Large Community
44%
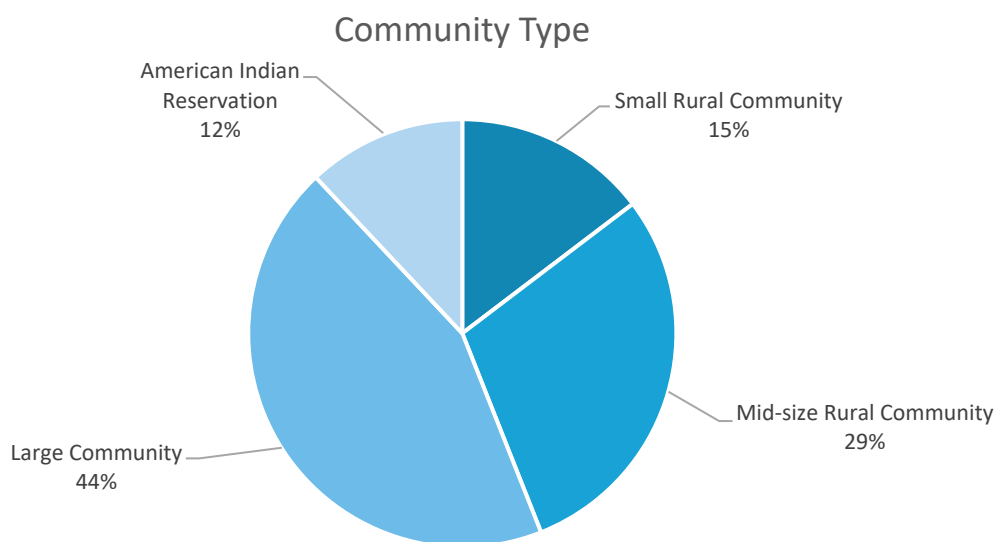
Grantee organizations work with a range of primary audiences at the focus of their efforts. Grantees were asked to report which of the following groups (listed in the chart below) they work with, and they could check more than one response. A quarter (26%) of grantees work with people experiencing poverty, 25% focus on early childhood and young families, 23% work with rural Montanans, 14% work with American Indian communities, and 4% target policymakers. Other key populations include those experiencing homelessness, survivors of sexual and domestic violence, adolescents, those with disabilities, educators, and the media.

Primary Audience

	Value
People Experiencing Poverty	26
Early Childhood / Young Families	25
Rural Montanans	23
American Indian Communities	14
Other	10
Policymakers	4
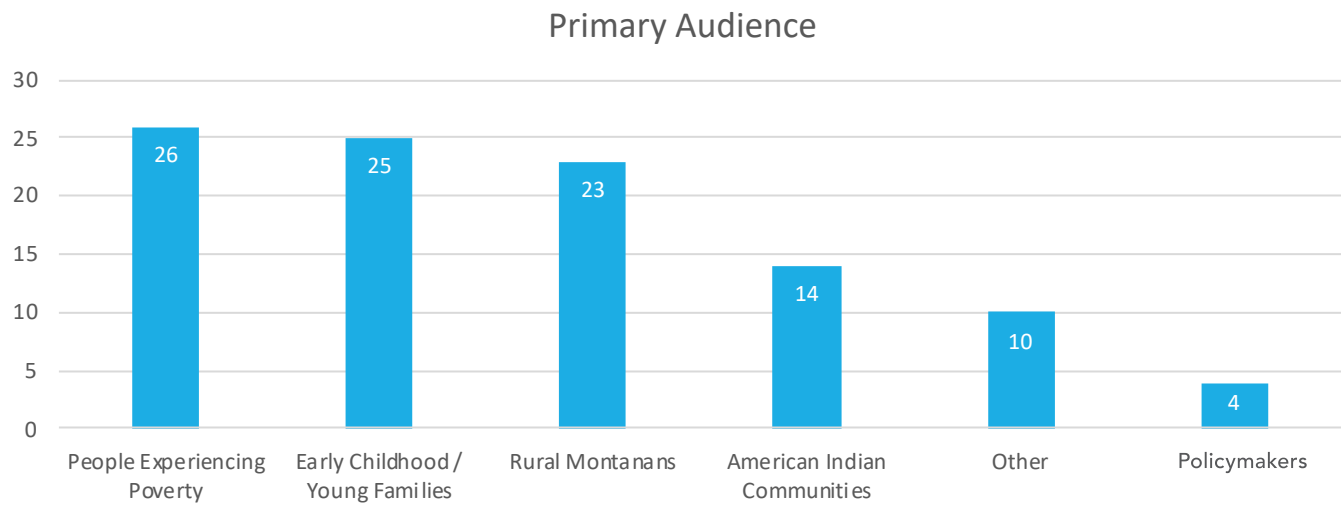
Social and Health-related Issues

Headwaters supports organizations that address many social and health-related issues affecting Montana communities. Responding grantees reported that they focus on the following areas: family resiliency, including early childhood education & development, child welfare, and family support (29%); mental health (19%); social inclusion related to civic participation, discrimination, incarceration, and Indigenous traditional k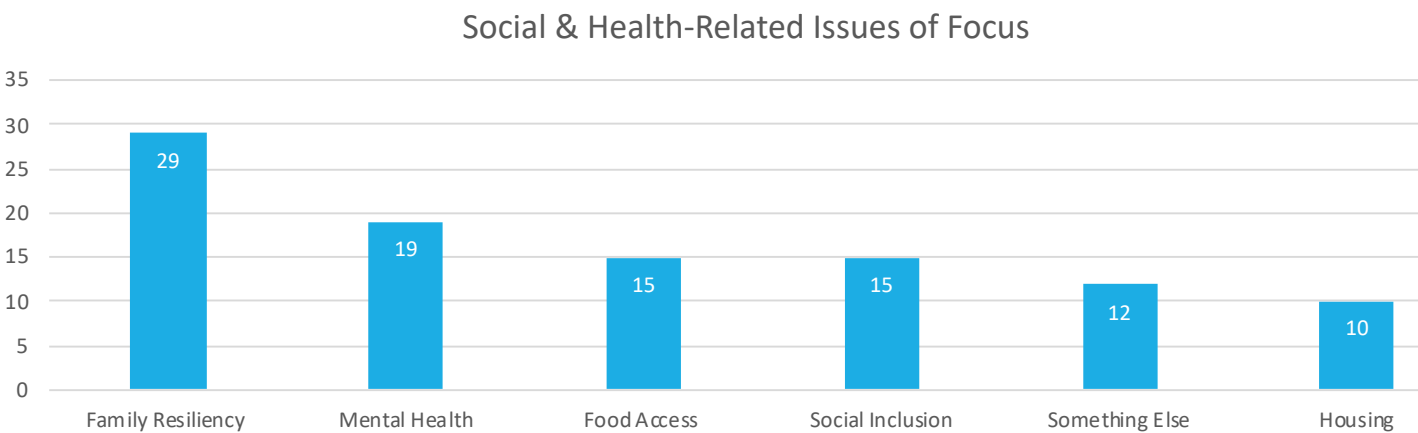nowledge and culture (15%); food security and access to healthy foods (15%); and affordable, safe, and quality housing (10%). Twelve percent (12%) reported that they focus on other issues including: youth engagement, substance use prevention, economic development, domestic and sexual violence prevention and treatment, dignity hygiene, access to health care, and Native American higher education, to name a few.

Social & Health-Related Issues of Focus

	Value
Family Resiliency	29
Mental Health	19
Food Access	15
Social Inclusion	15
Something Else	12
Housing	10

ORGANIZATIONAL CAPACITY

This section included questions in which respondents were asked to consider the capacity of their organization to complete activities and implement strategies. We define **capacity** as the time, skills, resources, and support needed to successfully engage in or complete an activity.

Activities that are Easy

The first item asked how easy or difficult would it be for the grantee organization to conduct a range of activities. The following activities were ranked as being the easiest for organizations to complete: engage the public using social media (57%); develop a detailed budget (53%); write a grant proposal (49%); review existing policies on issues related to their mission (47%); and speak with public officials or policymakers about the work of their organization (40%).

"Extremely Easy" Activities

Activity	Value
Engage the public in your work using social media	57
Develop a detailed budget	53
Write a grant proposal	49
Present your work using written or print media	47
Review existing policies on issues related to your work/mission	47
Speak with public officials or policymakers	40
Present your work on TV, radio, a podcast, or online forum	39
Build relationships outside of your organization	36
Track the outcomes of your work	35
Share your work using storytelling or other first-hand reporting	34
Maintain a quality website	29
Develop recommendations for public officials or policymakers	25

Activities that are Difficult

The five activities that were identified as the most difficult (a combination of those reported as being either somewhat or extremely difficult) to complete include: recruit new staff (43%); fundraise (37%); recruit new Board members (34%); maintain a quality website (30%); and develop recommendations for public officials and policymakers to address issues on which they focus (25%).

"Somewhat" & "Extremely Difficult" Activities

Activity	Value
Recruit new staff	43
Fundraise for your organization	37
Recruit new members to join the Board of your organization	34
Maintain a quality website	30
Develop recommendations for public officials or policymakers	25
Present your work on TV, radio, a podcast, or online forum	20
Share your work using storytelling	18
Track the outcomes of your work	16
Review existing policies related to your work/mission	13
Speak with public officials or policymakers	12
Build relationships outside of your organization	11
Develop a detailed budget	11

Access to Resources

Respondents reported the frequency with which they have access to a range of resources. **Access** was defined as having the resource internally or having an external partner with these resources that they can easily leverage.
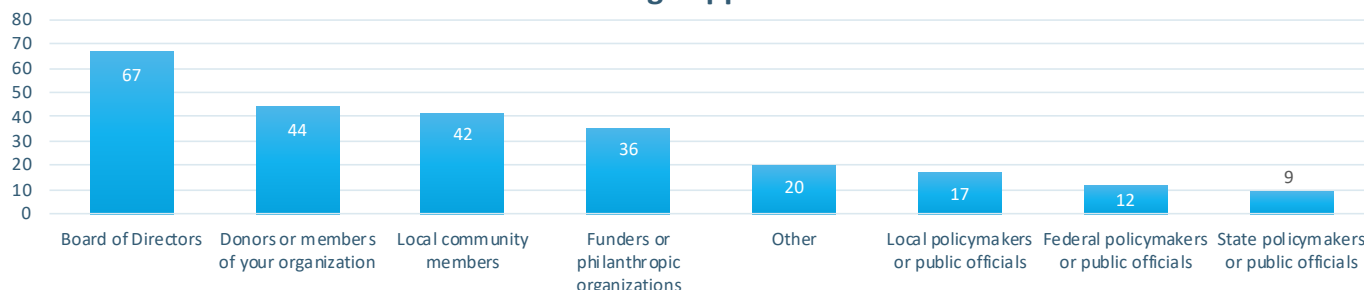
The top five resources which respondents stated that they always have access to include: supplies and equipment they need (32%); meaningful ways to exhibit leadership no matter the role or title of staff (32%); a network of partners with whom to collaborate (31%); grant writing expertise and support (29%); and meeting facilitation (28%).

The top five resources which organizations report rarely or never having access to include: political resources such as supportive policymakers or lobbyists (32%); marketing and advertising experts (27%); IT support (22%); expertise in social media engagement (20%); and sufficient financial resources (15%).

Support & Opposition

Grantees indicated the level of support or opposition they generally receive from a range of internal and external forces. The majority (67%) reported strong support from their Board of Directors and felt supported by their donors and members (44%); local community members (42%), and funders or philanthropic organizations (36%). The only source of active opposition reported was from state (6%) and local (4%) policymakers and public officials. However, most grantees reported little to no support from federal (52%), state (48%), or local (42%) policymakers. No differences were observed in the supporters or opposition based on the race/ethnicity of the organizational representative completing the report.

Strong Supporters

Category	Value
Board of Directors	67
Donors or members of your organization	44
Local community members	42
Funders or philanthropic organizations	36
Other	20
Local policymakers or public officials	17
Federal policymakers or public officials	12
State policymakers or public officials	9

Important Factors for Success

Grantees were asked to gauge the level of importance that different activities or factors played in their ability to be successful in their work.

The top 5 factors deemed very important for success included:

1. Communicating effectively within the organization (89%);
2. Demonstrating leadership within the organization (88%);
3. Evaluating the impact of their work (88%);
4. Communicating effectively with external partners (87%); and
5. Reflecting on successes and challenges (81%).

The following were identified as the top 5 factors that are not at all important to the success of the organization:

1. Engaging in advocacy efforts such as writing letters to the editor or testifying on issues that matter to their work (15%);
2. Recruiting and engaging volunteers (11%);
3. Implementing a strategic communication or marketing strategy (8%);
4. Conducting internal quality improvement audits (8%); and
5. Revisiting their mission and vision statements (7%).

Organizational Benefits

Respondents reflected on the extent to which they believe their workplace provides a benefits package that is adequately meeting employee needs. Although there was a range of responses, at least 20% of grantees expressed discontent with the following benefits: childcare (39%); vision (35%); dental (33%); mental health (24%); employee assistance program (EAP) for substance use disorders (24%); health care (23%); and a workplace wellness program (20%). American Indian respondents were more likely than white respondents to report being satisfied with their healthcare benefits. Organizations based in large communities were statistically significantly more satisfied with paid family leave benefits compared to organizations based in a Reservation community.

Areas of Focus for Organizational Capacity-Building

Out of a list of 17 areas related to organizational improvement, the following 6 were identified as the most needed to strengthen capacity:

1. Fundraising;
2. Communications & marketing;
3. Community engagement;
4. Grant writing and advocacy (how to effectively change hearts and minds);
5. Strategic planning; and
6. Volunteer recruitment, engagement, and coordination.

Most Significant Barriers

The barriers that create the most significant challenges to organizational success include:

1. Lack of financial resources;
2. Lack of state or local resources (tied with)
3. Inability to hire staff due to financial constraints; and
4. Not enough time to complete our work in a meaningful way.

Many respondents wrote in other descriptions of the barriers that impede their success. One identified "misunderstandings about the importance of language and culture in personal, family, and community health due to the colonizing process" while another mentioned, "lack of funds to market our organization." Others described issues such as, "lack of local resources for chemical dependency and mental health" and "short-term and variable funding" as barriers, and one respondent described "finding young leaders in our community is very difficult in our small communities."

Organizational Areas that are Underdeveloped due to Limited Resources

Organizations often must make difficult choices when resources are limited. What do you think are the three (3) main areas that are underdeveloped in your organization because your staff do not have the time or resources to dedicate to them?

Main Themes:

✓ Personnel, staffing, and financial independence;
✓ Services, programming, awareness and outreach;
✓ Leadership and collaboration;
✓ Research; and
✓ Strategic planning, organization, and structure.

Themes reported by participants commonly centered around problems and barriers created by a lack of necessary resources, including time and funding. Below, we provide more information and illustrative quotes that exemplify each of these main themes around areas that are underdeveloped among grantee organizations.

Personnel, Staffing, & Financial Independence

Within this area, responses were indicative of growth opportunities related to quantity and quality of staff, competitive pay for new staff recruitment to rural communities, staff benefits (*e.g.,* physical, behavioral, and mental health care, sick time, vacation, personal leave, job security), staff burnout/turnover, and staff training on best practices and team building. Further, participants identified the need for more Human Resources support to handle personnel issues; increased Diversity, Equity, and Inclusion training and action, and assistance identifying best practices on how to manage and coordinate volunteers.

One participant noted that healthcare is essential to the success of their staff: "…our team's positions are uniquely demanding of both mental health and physical health. However, no one in our organization is able to afford their own healthcare… there remains a gap in access to physical healthcare, despite it being necessary for the provision of our services."

Others echoed these sentiments, stating that they had little time and funds to allocate to professional development and staff training. Similarly, responses to this question generally described a lack of financial independence and resulting limitations and strain on staff.

As one respondent noted, "fundraising is severely underdeveloped, as living in "survival mode" impedes our ability to invest in our future. We are good at surviving, but it is leading to burnout of our small team."

Services, Programming, Awareness, & Outreach

Several respondents noted underdevelopment in their provision of services to clients, acknowledging that the content or programming they offer needs work in certain aspects. For example, one participant noted that, regarding program implementation, "there is so much to do [here], but we don't have enough staff" and expressed desire to create more diversity and depth within their program content, and to offer more classes and workshops to the community.

Another participant reported making the difficult decision to cut programs and services offered due to limited resources. "We closed a program due to lack of funding. This affected 6 part time staff. We have been asked to implement home visiting, but we do not have the staff to run that program."

In general, participants noted difficulty in telling their "story" and advertising/creating awareness of their services for potential clients in need. One participant emphasized the importance of "getting our [story] into the community… [and] telling the story of those impacted by our work and those who help make it happen." They elaborated that their "outreach coordinator is stretched thin. She does a great job on social media but has so much marketing to do that the time for that is limited."

From a political and policy change perspective, participants described similar barriers and a real need for advocacy, explaining that "we do not have a lot of time to actively engage our local or state politicians right now because we are so busy trying to engage the population we serve." Ideally, they would "have a more robust policy-advocacy program, rather than do this piecemeal."

Leadership & Collaboration

Several grantees expressed the organizational goal of striving for excellence in management and leadership, both within their organization and among their respective boards and alumni associations. For example, one respondent shared that they would like to develop supportive managers and leaders internally who help to "grow others to their fullest potential." Another participant noted that their "board involvement and diversity is not where we'd like it to be because of limited director capacity."

Respondents expressed a desire to increase board and alumni membership, productivity, diversity, meaningful participation, and education/training to elicit meaningful support from these overseers. One participant highlighted that "finding competent, ambitious people with free time has proven difficult, resulting in our ED needing to also try to manage the board while trying to recruit new board members (while being an ED and the sole provider for our services)."

Regarding needs for collaboration and coordination internally and with external providers, many participants similarly reiterated sentiments that there is a need for "collaboration with state [and outside] partners - we are spending much of our time looking at things locally and realize we may be missing help or support from statewide resources because we don't have capacity to look outside of our community."

Research

Many respondents expressed a vested interest in conducting internal and field research, engaging in data collection, and conducting impact analyses and program evaluations to inform their future efforts. One respondent emphasized the importance of "meaningful data collection" that can benefit their organization, rather than collecting data simply to satisfy requirements. Others echoed feeling pressed for time, resources, and expertise in conducting this important programmatic research and monitoring.

Strategic Planning, Organization, & Structure

Respondents almost universally noted a need for additional assistance, time, and resources dedicated to strategic planning and developing and updating sound and sustainable internal and external policies and procedures. For example, one respondent explained, "right now most of our work is centered around meeting current needs and issues. We don't have the financial resources to devote to some dedicated planning time. With more financial resources that would increase staff capacity we could 1. Develop and structure curriculum manuals that would eventually make our programs easier to train others and distribute, 2. Spend time on improving our evaluation, which would allow us access to more and better funding sources, 3. Have time to focus on strategic planning with staff, board, and youth board."

ADVOCACY

Interest in Advocacy Training

Almost 43% of all respondents stated that their organization has a strong interest in engaging in more advocacy work; 44% reported a moderate interest with only 6% indicating little to no interest, and 7% were unsure.

Grantees expressed a strong interest in obtaining training in the following advocacy activities: writing or providing testimony (82%); developing print materials (81%); social media engagement (80%); hosting a rally or public event (79%); hosting an educational or informational session or event (77%); hosting a phone bank (74%); engaging with local legislators, public officials, or policymakers (73%); participating in media engagement (72%); website development and maintenance (68%); recruiting and engaging volunteers (55%); and writing letters to the editor or op eds (47%).

Advocacy Training: "Strong" & "Moderate Interest"

Activity	Value
Providing testimony on state or local policies	82
Hosting a rally or other public event	81
Hosting an educational session or event	80
Social media engagement	79
Developing print materials such as flyers or reports	77
Hosting a phone bank	74
Participating in media interviews	73
Engaging with local legislators and public officials	72
Website development and maintenance	68
Recruiting and engaging volunteers	55
Writing letters to the editor or op eds	47

Barriers to Advocacy Efforts

The top barriers to engaging in advocacy work include:

1. Limited staff time (58%);
2. Lack of funding to support advocacy efforts (45%); and
3. Limited staff skills or knowledge about effective advocacy (23%).

In addition, 22% of respondents indicated that concerns about being in compliance with 501c(3) regulations and lack of knowledge about how best to engage in advocacy efforts were also top barriers.

Concerns about Advocacy

What concerns, if any, do you have about engaging in advocacy work?

> **Main Themes:**
> ✓ Compliance with 501c(3) and other regulations
> ✓ Financial constraints
> ✓ Lack of staff time, staff skill, or paid personnel
> ✓ Lack of support for controversial or issues deemed too political

Grantees commonly expressed a desire to engage in more advocacy work, but it appears that many are unable to be successful in this space because of the barriers or concerns identified.

Compliance with 501c(3) and other regulations

Coupled with the survey question above, many respondents were careful to call out their concerns specific to being in compliance with their organization's designation as a 501(c)3 non-profit. One respondent said, "We would want to be sure this was within parameters of what is legal for a non-profit." Another cited, "501(c)3 regulations and grant restrictions" indicating a barrier relevant to funding parameters around advocacy as well.

Financial constraints

Aligned with many barriers identified throughout the needs assessment, lack of funding to specifically support advocacy efforts was common. One respondent stated, "We don't have any funding to engage in policy/advocacy work."

Lack of staff time, staff skill, or paid personnel

The most commonly identified concern fell under the issue of lack of staff time, staff skill in this area, or a more general barrier of lack of paid staff to engage in this work. One respondent stated, "We don't have staff hired for advocacy, so when staff work on advocacy it takes time away from their 'real' jobs." Another bemoaned, "We lack the time to meaningfully participate while ensuring the integrity of our current projects."

Lack of support for controversial or issues deemed too political

Several respondents reflected that advocacy and public engagement has the potential to distance themselves from certain people in their communities. One person provided this insight, "Done poorly, it alienates supporters and risks harming the brand. In a highly politicized atmosphere – such as the USA and Missoula in 2021 – it risks politicizing our work in a way that could reduce support." Another stated, "My main concern is wasting time on bureaucratic systems that do not value these outcomes as much as we do."

Advocacy & Policy Support from Headwaters

What ideas do you have about how Headwaters can best support you in advocating for the issues you care about at the policy level?

Main Themes:
✓ Resources (time & funding);
✓ Internal training, education, & strategic planning;
✓ Marketing & outreach;
✓ Third-party advocacy, mentorship, collaboration, & follow-up;
✓ Research, monitoring, & evaluation.

Themes reported by participants commonly centered around an opportunity for Headwaters to help their grantees help themselves, and to advocate alongside them. Below, we provide more information and illustrative quotes that exemplify each of these main themes.

Resources (Time & Funding)

In congruence with responses to other survey questions, grantees similarly endorsed a dire need for funds and means to secure consistent funding for the future. In particular, respondents indicated an interest in outsourcing or training in grant writing, funding outreach initiatives to reach broader audiences, and securing product donations to be able to allocate their grant funds and resources elsewhere.

One participant suggested that Headwaters direct their investment efforts toward building strong families to prevent future crisis response involvement: "I have very good staff with great motivation to build a stronger future and my current staff want to see change. How [do] we strengthen families, how can we better support quality early care and education and invest in the early years and not have to repair broken families and children. I believe the issue is education to all because that is the key to success, so every child has the best start in life. We know the brain is almost 90% developed before the age of 5. We need to invest in the first 5 years and support families, so we are building strong children in the context of supportive, loving relationships. I feel we invest way too much in corrections when if the tables were turned and we invested in the early formative years we would have a stronger future for everyone."

Internal Training, Education, & Strategic Planning

Grantee responses to this question generally indicated that additional training and education about the legislative process would be helpful in increasing the effectiveness of their advocacy efforts. Specifically, they noted that Montana-specific advocacy strategies, education on policy processes and optimally focusing their efforts (meeting with legislators, sharing stories, supporting policies, etc.), and guidance regarding how best to present their data meaningfully to legislators would be most helpful.

One grantee affirmed the importance of advocacy and requested that Headwaters offer "trainings to support all people interested in [advocacy work]" and noted that "this is an area where most people don't feel like they have adequate knowledge or skills. It's so important to raise up all voices of people in all walks of life to be able to advocate for themselves (not just people in positions of power)."

Another respondent gave voice to a common problem they have generally encountered regarding training and its long-term utility, especially within the education system. They suggested that Headwaters implement "training during the summer involving mixed groups with pay given for 1) training participation, 2) training product implementation, and 3) reflection session participation in Oct, Feb and May. There is a lot of training and people sometimes go but then they don't implement, and they should be held accountable for implementing but also paid for their work because implementing will require much more of them."

Other shared requests involved strategic planning and assistance in ensuring that their agencies are functioning smoothly, specifically in pursuit of leadership development, tips to motivate volunteers, budget and staffing templates, and quarterly meetings with Headwaters to facilitate the successful use of grant funding to meet agency-specific needs.

Marketing & Outreach

Many respondents indicated that additional education and awareness-raising efforts within the community would aid in the successful delivery of their services. These responses highlighted the importance of media campaigns as change facilitators and suggested focusing on increasing awareness of the experience of poverty and of Salish Kootenai College and the Salish Kootenai College Foundation to expand knowledge and relations among the local community and Montana Tribal communities.

Several grantees touched on the need for parenting and family education, noting that, "at times, parent education is overlooked. We are teaching parents how to be independent, how to utilize services available to them, so that when they leave our program and transition into the next phase, they feel a sense of accomplishment and success and are ready to support their children and their family with an active voice in the community. Advocating for increased funding not just of early childhood education, but for parent education, hands on parent education...not collaborative services, rather, direct services, would be amazing."

Third-Party Advocacy, Mentorship, Collaboration, & Follow-Up

Several grantees identified a shared vision for third-party advocacy and partnership with Headwaters. In such relationships, Headwaters would ideally aid in uplifting the voices of their agencies, which may otherwise be overlooked due to small size and limited reach. In particular, they requested attendance at joint meetings and panels with local, state, and national leaders, and assistance with inclusion in state and federal-level conversations. To this end, they suggested Headwaters co-brand their efforts to garner greater support in the local, state, and national legislative process. Issues in which they require partnership include, for example, expanding awareness of the experience of poverty and improving laws that burden low-income families. One participant offered that, "if Headwaters were unable to do so, partnership and co-branding support from other third-party organizations willing to do advocacy work" would be welcome so they could "focus on [their direct services] work."

One grantee uniquely drew attention to a need for policy enforcement, illustrating difficulty with follow-through once bills have halted within the state legislative process. They shared the following in hopes that Headwaters could re-invigorate their exhausted efforts: "We have been working on trying to get Medicaid reimbursement for

an evidence-based treatment model for mental health and substance abuse for adolescents for over three years. We have been told by DPHHS it's a legislative issue, and our bill was tabled by legislatures, calling it a DPHHS issue. Legally both parties are responsible. Having third-party advocacy for reimbursing evidence-based healthcare through Medicaid is highly needed. While it is written in their policy, there is no enforcement, and instead strong internal opposition to allowing updated science into public healthcare funding."

An additional important theme emerged around continued mentorship and oversight from Headwaters. Multiple respondents requested that Headwaters follow-up on a semi-regular basis with its grantees to ensure that agencies are allocating their funding in the most effective manner possible.

Other participants noted a need for collaboration and suggested a public advocacy forum and/or coalition, where Headwaters grantees could engage in "joint messaging" and collaborate to promote awareness of their respective efforts and upcoming bills in need of support within the state legislature.

Research, Monitoring, & Evaluation

Several respondents called attention to a need for assistance in conducting, evaluating, and presenting research findings pertaining to their services. One grantee noted that "an outside evaluation by an established agency/non-profit familiar with the challenges faced by rural groups could be beneficial with recommendations for different approaches, missed opportunities, and other available funding."

Another respondent emphasized the importance of meaningful research and the complexities of the advocacy process: "Data that is well researched and simply presented can have impact with some decision makers. Often those making the decisions are so connected to a political party or one ideology that they close their eyes to other ideas. I think providing good information on the topics is vital. But it has to be provided in a continuing dosage over a long period of time." Assistance in pursuing effective and sustainable advocacy strategies would be helpful in this regard.

COMMUNITY LEADERSHIP

The majority (52%) of grantees feel that they are moderately equipped or prepared to act as community leaders on issues that are important to them. A little less than one-third (28%) feel very well equipped while 13% feel poorly prepared to act as community leaders; 8% are unsure about their level of readiness or preparation.

Hopes and Dreams for the Future of their Community

When you think about the future of your community, what are your hopes and dreams for your community? Please describe the one or two big-picture goals you have for your community.

Main Themes:
- ✓ Diversity, Equity, & Inclusion;
- ✓ Basic need fulfillment;
- ✓ Reduced stigma of mental illness & innovation in crisis response;
- ✓ Collaboration & Unification and Meaningful & Supportive Connection;
- ✓ Health, conservation, & sustainability;
- ✓ Dignity, life sovereignty, & belonging; and
- ✓ Prioritization of families & children.

Themes reported by participants commonly centered around a shift toward more openness and progressive commitment to inclusive community values. Below, we provide more information and illustrative quotes for these main themes around grantee visions for the future of their community.

Diversity, Equity, & Inclusion

Grantees responded to this question in a manner that suggested a shared value prioritizing Diversity, Equity, and Inclusion (DEI) within the northwestern communities of Montana. Collectively, respondents envisioned a community in which everyone maintains personal accountability and responsibility for creating systemic change toward the promotion and cultivation of lifelong learning and growth surrounding Diversity, Equity, and Inclusion. This includes a community in which all individuals are seen and heard, welcomed, and invited to share their ideas. Further, they envision a world in which everyone is valued equally regardless of race, gender, sexuality, ability, or age.

One participant envisioned a "community where people recognize how fortunate Americans are to have so many options and they take advantage of the options to further make their community a better place for everyone." This ideally would consist of "engaged youth and families and communities valuing community resilience, diversity, and recogniz[ing] individual value within a team/community."

Basic Need Fulfillment

Many responses described a community which, at a minimum, is accessible to all and in which everyone's basic needs are met. The basic needs mentioned included safety/freedom from abuse, food security, education, childcare, paid caregiver leave, meaningful work for a living wage, affordable housing/eliminating homelessness, equitable voting practices, and quality healthcare including mental health and substance misuse treatment.

One grantee described a community in which everyone "thrives," and has "the opportunity to lead a healthy, successful life, regardless of what neighborhood they live in, how much money they earn, their ethnicity, background or gender identity. Kids show up for kindergarten ready to learn and succeed, everyone graduates from high school prepared for college or career, and seniors are able to live in dignity, connected to the world." They summarized their ideal community as one that is an "innovative, inclusive community that other places envy and want to emulate."

Reduced Stigma of Mental Illness & Innovative Crisis Response

Many respondents described a pattern suggestive of a cultural shift toward an idea of community that values changing the culture around mental health treatment, crisis response systems, and underage substance use.

One grantee acknowledged that "Change is slow, and especially when addressing a deep seeded, long held, almost proud persona of 'we're so tough even our babies drink beer!'," and further posed that, "when our community/county consistently raises red flags and takes corrective actions to reduce/eliminate youth substance use, our hopes will come to fruition."

A key area for improvement shared by many grantees includes changes to crisis response within the community, including ideas about "developing and implementing a comprehensive crisis response system, specifically in regard to mental health challenges. Mental health is inextricably a substantive part of our overall good health and not a reason for shame nor stigma."

Other responses aligned with these ideas and pushed for "a multi-dimensional and integrated crisis response team which eschews ER hospitalization, law enforcement involvement, and/or incarceration as the only options in responding to a mental health/addiction crisis." They envisioned incorporation of "Peer Support Specialists as part of an outreach option after an evaluation by a qualified behavioral health therapist and as perhaps a consistent 'ride-along' with EMS staff. The interaction with law enforcement would begin with a rubric used by dispatch personnel to identify the potential of a mental health crisis."

Collaboration & Unification and Meaningful & Supportive Connection

Several grantees identified a shared vision for a community that is meaningfully connected, unified, and in which all are interested in and willing to work together to help one another rather than compete for limited resources.

Respondents noted that they would like to see "less of an 'us' vs. 'them' mentality," and for organizations to work together to strengthen one another.

One grantee shared a suggestion for establishing an "overarching group" intended to "bring the nonprofits and community groups together, both in work, community engagement, and fundraising efforts," which they surmised would be "deeply impactful to the good work these org[anizations] are attempting to accomplish with limited resources."

Another respondent highlighted a need for common ground and re-focusing efforts "to effectively pull these polarized populations together and develop collective buy-in…so folks can rally around the real issues taking place in our community, rather than being divided, ineffective, or unengaged."

Health, Conservation, & Sustainability

Many respondents called attention to visions of a healthy, self-sustainable community that values protecting and conserving the land, water, and air, and that prioritizes local sustainability (e.g., equitable food systems and seed banks) rather than relying on outside sources of funding and resources.

A respondent from one community organization expressed a "vision of food security for all, regardless of financial or social standing, with an easily accessed local food system, which supports both those growing the food and those eating healthy foods," and another respondent concurred, dreaming of "a surplus [of food] for all to share."

Other grantees commented on policy change, desiring "a community that supports local policies for the future of a robust local food system, from the conservation of the lands needed to grow food, to the farmers working to successfully run food businesses, to consumers in need of access to affordable and healthy foods."

Dignity, Life Sovereignty, & Belonging

Respondents commonly expressed hopes for a community full of opportunity, whose members feel useful, valued, dignified, and who experience life sovereignty and a sense of belonging.

In illustration of this dream, one respondent shared hope that "more and more of our neighbors will use our services to have dignity restored" so that they may "hold their heads high and know they deserve the same respect the rest of us get."

A grantee from another community organization impressed the importance of "giv[ing] voice to the voiceless, the downtrodden, and the low-income families who don't seem to belong (as a result of exclusion) at the bigger tables."

Prioritization of Families & Children

Many responses illustrate a vision of a community which everyone's children are proud of for generations to come, where families can learn life skills, and in which fewer children are separated from their families.

One respondent delineated the following improvements in family and child welfare: "1. I want to see a community where generational cycles of poverty are broken, and child abuse and neglect is substantially lowered. 2. I want families to feel supported on their journey, whether that is foster families, birth families, etc. We all need support and access to community resources in a coordinated way."

Another grantee envisioned a community with "all kids living free of abuse and neglect."

Facilitators & Resources in Support of Goals

What facilitators or existing resources might help make achieving these goals possible?

Main Themes:
- ✓ Fundraising & fund allocation;
- ✓ Education, training, expertise development, & learning;
- ✓ Networking & collaboration;
- ✓ Advocacy, awareness, & policy change;
- ✓ Marketing, community engagement, & research
- ✓ Facility construction & equipment acquisition;
- ✓ Leadership, personnel management, & Human Resources support;
- ✓ Diversifying representation; and
- ✓ Provision of services & community events.

Below, we provide more information and illustrative quotes that exemplify each of these main themes around grantee ideas related to the facilitators and resources needed to achieve community-wide goals.

Fundraising & Funds Allocation

Community leaders responded to this question in a manner that suggested a need for financial support, as well as support in procuring and managing consistent future funding. Collectively, respondents expressed an interest in learning how to meaningfully engage philanthropists, to shift societal views from giving to "charity" to supporting "just" causes, and to securing flexible funding that is not contingent on error-free progress.

For example, one participant envisioned "funding that supports change - failures -- its ok to fail if you try and learn from the trying."

Another grantee expressed a belief that "having dedicated staff to do the 'leg work' for non-profits would make a very big difference, but generally speaking any funds raised goes towards completing projects: playground equipment, (a future swimming pool), stadium seats at the Fairgrounds, baseball fields and equipment, books for the Library, food for the Food Banks..." Ideally, additional funding would create more positions and time to dedicate to achieving more of the organizations' goals.

Education, Training, Expertise Development, & Learning

Respondents indicated continued need for education and training on topics such as Diversity, Equity, and Inclusion; advocacy; parenting; grant writing; low-cost, energy-efficient, aesthetically pleasing housing models; voter education; crisis response in similar communities; and childcare resources.

One respondent further specified a desire for "education on how to get organizations involved on the policy level."

Another advocated for specific changes to school curricula, including making "sex and health education programs mandatory in schools."

Networking & Collaboration

Grantees provided creative and thoughtful ideas for inter-agency collaboration and networking, including retreats, conferences, round tables, quarterly meetings, forums, creation of a coalition of groups working together on the same issue (*e.g.,* poverty), and ways to garner support from outside (for-profit) agencies.

Based on grantee responses, such collaborative efforts would focus on "shar[ing] more about our work" and forming meaningful "collaborative partnerships to better meet the needs and increase BIPOC and LBGTQ participation at all levels."

Advocacy, Awareness, & Policy Change

In this important realm of affecting change through advocacy and policy shifts, grantees requested Headwaters' assistance in influencing public officials, engaging policymakers, advocating for policy change, engaging outside organizations on a policy level, increasing the number of rural voices and Montana businesses advocating together, third-party advocacy from Headwaters for important issues, and bringing awareness to the importance of building strong families and children and ending environments that perpetuate poverty and sustained low-income status.

One respondent noted that they would like to see Headwaters assist as a third party in "advocacy for public healthcare policy amendments, and funding for more pilot programs to further exemplify the effectiveness of using evidence-based mental healthcare in Montana, which can then further influence public officials."

Marketing, Community Engagement, & Research

Many grantees noted continued needs for social media and website support, which would ideally be specific to engaging small town communities with non-profit organizations. Several respondents called attention to a need to learn how to "engage more parties in conversation," and to connect with those with "lived experience" who are interested in making a difference. A few grantees expressed a desire for assistance in implementing evaluation and data collection tools and conducting community assessments.

Facility Construction & Equipment Acquisition

Specific material resource needs were indicated by several grantees, especially those in the food security and family services sectors. For example, identified needs included land donation, facility construction, provision of food storage and processing equipment, establishing a food incubator site, creation of a community resource center with

a coordinated approach to serving families, a one-stop childcare center, and a relief nursery. One respondent voiced the following: "we need the donation of land and then a capital campaign to build a facility. Think something like the PEAS farm in Missoula, with kitchen and education space, but also cooler, storage and processing space for crops and seeds."

Another respondent identified a "dream of relief nurseries... There is just one in MT, Toby's house in Great Falls. Oregon has a whole network. The very best resource we had for our highest risk families. There was a bus, Head Start, PT/Speech/OT, home visits, supervised visits, no contact drop off, childcare center...so a one-stop shop idea could be a good step. What if foundations just paid for infant slots, then non-profit partners/business could figure out how to distribute them?"

Leadership, Personnel Management, & Human Resources Support

Many of the grantee organizations provided indication that they would benefit from improved leadership, professional development opportunities, a job board, volunteer staff development, facilitators with expertise in racism, and the diversification of HR to include mediation, conflict management, and resolution.

Regarding leadership development, one participant desired "leaders who have a higher level of risk taking toward necessary change."

Diversifying Representation

Respondents commonly touched on a theme related to increasing diversity, equity, and inclusion, starting with Headwaters, and expanding down into grantee organizations. They particularly wished to see an "increase BIPOC and LBGTQ participation" and partnerships with organizations that focus on uplifting diverse communities.

Provision of Services & Community Events

Many of the grantee organizations expressed a need for more events to unite the community and facilitate the process of re-connecting after the COVID-19 pandemic. In pursuit of this, a few organizations described a desire for an allocated position focused on strategic planning, event-planning, and expanding the provision of services to the community. For example, one participant heartfully expressed: "Covid-19 has left a lot of school age children behind, and we are having more and more young students turn to us so they can complete their high school equivalency diploma. We will need additional resources to address this new population of potential students for our program."

Another participant requested more support for successful home ownership for Tribal Members, for whom the influx of out-of-state buyers has been particularly problematic, negatively impacting the affordability of quality housing.

Other needs identified by individual respondents included opportunities for ID acquisition, creation of voter registration stations, free distribution of and destigmatized access to safe sex items, better access to mental health services, and planning youth-specific events to engage young volunteers.

Community-Level Barriers

Respondents identified the following issues as the main barriers that stand in the way of achieving community-wide goals:

1. Lack of financial resources (45%);
2. Lack of coordinated efforts across multiple organizations (33%);
3. Lack of community recognition that these are important issues (27%);
4. Lack of resources related to infrastructure (27%); and
5. Lack of human resources – too few people working together, too few investments in social and human capital (23%).

Barriers related to other social and logistical factors were also described. One participant stated, "Lack of resources in that the closest state and federal services are 60 miles away." Another expressed, "Moral judgements, narrow mind set, lack of exposure to the rest of the world, limited contact with diversity."

Necessary Shifts in Attitudes, Beliefs, Behaviors, & Actions

What kinds of shifts in attitudes, beliefs, behaviors, or actions need to occur to make progress towards achieving these goals?

Main Themes:

✓ Long-term solutions;
✓ Community-wide, contemporary, & intersectional education;
✓ Unity, meaningful relationships, & collaboration;
✓ Representative allocation & access to resources;
✓ Leadership;
✓ Nutrition & equitable food practices;
✓ Improved outcomes & services for children; and
✓ Racial & cultural inclusivity.

Grantees commonly centered the need to shift community values and to improve access to resources. Below, they shed light on how these shifts might occur.

Long-Term Solutions

Respondents generally noted a lack of long-term, sustainable solutions and systems in the community. They called for more long-term solutions rather than short-term "Band-Aid approaches" and "quick fixes" to problematic systems. Grantees requested more emphasis on preventative, rather than reactive efforts after a crisis has occurred. One grantee illustrated that the community is "good at helping people after they 'fall out of the boat.' We need to be better at keeping people IN the boat."

Another participant noted that shifting attitudes and overcoming "all of these barriers require[s] time, commitment and the ability to engage in long-term planning and evaluation. So much of the barriers to-date have been rooted in scarcity, competition, and negativity from organizations who may perceive our work as a threat, instead of an asset. Investing more time in building relationships through collaborative processes is important in overcoming [these] barriers. Long-term, dependable financial support is also important in our efforts to maintain staffing and operating costs."

Community-Wide, Contemporary, & Intersectional Education

Many respondents across organizations highlighted the importance of educating the community through reliable sources on topics not taught in schools, such as healthy parenting practices and the causes and effects of substance use, housing insecurity, and poverty. Further, respondents called for education on the ways in which "investing in these social issues will benefit everyone, including them." Respondents expressed a desire for the community to develop "a clear understanding of the issues surrounding poverty and low-income status and a willingness of the rest of society to help people out of challenging social and economic situations through resources, education, and opportunities for success."

One grantee directly addressed the enormity of the educating that would need to take place from the ground up, and that "significant shifts that seem very challenging under what we have seen occur in the last few years. Education is still a real tool. Too many people get their history or learning from snippets on tv or a social media platform. Somehow this has to be addressed. It also has to do with educational requirements and the ever-changing educational standards. I see little being taught about any contemporary history with the local schools."

Unity, Meaningful Relationships, & Collaboration

A number of grantees touched on common threads of collaborating together toward common mission-driven goals (rather than competing for resources). They posit that the most important change that could truly benefit the community would be a shift from a position of entitlement, profit-focused, and overprotectiveness of resources to a community that cares and meets everyone's needs (regardless of situation) and one that promotes personal responsibility and improved outcomes for the whole community.

One participant wished for "a greater recognition that 'we're all in this together'."

Another echoed this solicitation for teamwork to achieve the best possible outcomes, stating "we need to consider how we leverage each other's expertise rather than compete for each other's resources. We are on the same/similar journey, we just have different paths to get there."

Representative Allocation & Access to Resources

Several grantees eloquently identified issues resulting from unequal access to resources. They discussed difficulties securing stable funding, insufficient financial support systems, and organizations that constantly struggle with low capacity related to time, staff and community commitment, differing levels of ability and passion, and difficulties hiring staff. They also describe the consequences of inequitable allocation of resources including limited access to land donors, an overreliance on volunteers, and a need for assistance with business and vision planning and entrepreneurial thinking.

One respondent called for a sea-change in the way that society views social services, as in a "shift from thinking social services should be staffed by volunteers in their 'spare time'. These days most families have at least 2 jobs and don't have the capacity to write and administer grants, develop programs, deliver services, keep up with best practices and track effectiveness in a non-paid position."

Importantly, these respondents reflected that the allocation of resources to social services and non-profits does not accurately reflect the importance of family and child services, which are essential to creating a healthy community

infrastructure. Many grantees called for policy and a broad scope of attitudinal changes to better inform appropriate budget allocation.

Leadership

Multiple grantees drew attention to a need for community and organizational leaders to "walk the walk," lead by example, and promote community buy-in. To illustrate, one grantee believes that "projects need community-wide leadership, across all sectors, to "sell the change" and reinforce for each individual "what's in it for them."

Another grantee indicated a need for leaders to become more attuned to the needs of their clientele on the ground-level and to prioritize care over profit: "leaders from both non-profit and for-profit agencies need to understand that there is no shortage in demand for effective services, and that increasing quality and access to care does not eradicate the ability to continue successful operations for new clients. Humans will continue to need help and lowering readmission rates or increasing preventative care will not eliminate the need for services but may slightly shorten some waitlists and allow for more people to receive care before it's too late."

Emphasis on Nutrition & Equitable Food Practices

Grantees continued to call for a shift in attitudes toward nutrition, health, and the value of food. One grantee emphasized a "need to see a change in peoples' habits around buying and consuming food" and another added that others can come to understand and build empathy when they see "what life is like for people struggling with hunger/poverty."

Improved Outcomes & Services for Children

Several respondents identified the supreme importance of shifts in attitudes and cultural beliefs surrounding childcare and emphasized that all children should have access to services, regardless of their rurality or family resources. One grantee spoke from experience, stating that "all children should have equal access to afterschool and summer programs. Not just the ones who are funded by grants through OPI. Urban communities have multiple resources, partnerships, and activities available to them. Rural communities do not, and most do not receive the resources from the State like the bigger communities do."

Others called for a shift from individualism to collectivism, proposing that "our community needs to stop making childcare an individual issue (each family is responsible for it by themselves without any help) and instead make it a community/economic issue (if parents can't find childcare, they can't work). I also think our childcare workers are so insulated that they do not work together in any capacity. A shift in their attitudes toward a community-minded solution, rather than an individual/financial solution may help as well."

One respondent emphasized that we need to prioritize our children, because the fate of our community will one day be in their hands. They asked, "How do we put children first? How do we get everyone to understand in order to have a strong community, we need to support our children and families! That is the only way we can move forward! We need more ACE training in the whole community! Our early childhood experiences shape who we are as adults. We must break the cycle of abuse and start with compassion for all families to get them on a healthy path."

Racial & Cultural Inclusivity

Across several responses, a clear request for appreciation, respect, and preservation of the knowledge, customs, and language of the diverse populations living alongside one another in Montana was issued. For example, one respondent referred to a Qⅼispé Elder, who "discussed the state of our Sélišᵕ and Qⅼispé cultures on the Flathead Reservation," and "exclaimed that we are in a state of 'crisis'" regarding the fading culture and language of Native American/American Indian peoples in Montana. In particular, this respondent noted that "the Ksanka community is suffering similarly with few cultural knowledge keepers remaining" and identified that "at this time, it would be incredibly helpful to find or build an understanding of the value of this work and/or a financial support system to assist in continuing the efforts our Elders and Knowledge Keepers have asked of us."

Another responded called for "Greater awareness of the diversity of our community and finding the right connections to bridge the gaps."

Support for Positive Culture Change

What kinds of efforts should Headwaters support to increase the ability of individuals within organizations and communities to create meaningful change in attitudes, beliefs, or behaviors?

Main Themes:
- ✓ Public relations, marketing campaigns, & social media exposure;
- ✓ Training in grant writing & securing funding;
- ✓ On-going supportive check-ins & coaching;
- ✓ Inclusive community-building;
- ✓ Facilitation of networking & coordinating collaborative approaches;
- ✓ Support for education & learning;
- ✓ Supporting sustainability; and
- ✓ Informed leadership & creating space for change.

Below, we provide more information and illustrative quotes that exemplify each of these areas where Headwaters' support would be most beneficial to creating meaningful cultural change.

Public Relations, Marketing Campaigns, & Social Media Exposure

Many of the grantees indicated that they would greatly benefit from the community becoming more informed about Headwaters' funding opportunities as well as doing more to promote the organizations they support. More specifically, grantees requested assistance with public relations through the creation of "community engagement" meetings and piloting efforts to increase collaboration at the community-level. Respondents discussed wanting to use more storytelling and innovative ways to work with the traditional media as well as social media to share and promote their work.

One respondent highlighted a need for more equitable media coverage across small and large organizations. Additionally, they offered ideas about creating media campaigns focusing on "changes needed in educational settings," "housing needs," and the importance of a "cultural shift toward collaboration."

Training in Grant Writing and Securing Funding

The need for more support with securing stable funding was evident across many grantees. Several grantees suggested the idea of more accessible grant writing workshops, including those that could be offered virtually. One grantee asked for more information about available funding opportunities, a continuation of the GO Grants, and "funding for smaller programs and those advocating for rural communities with OPI."

On-going Supportive Check-ins & Coaching

Several grantees expressed an appreciation for the flexibility and free reign that Headwaters allows for each organizations' efforts to achieve their own predetermined goals. They expressed a desire for recurring check-ins with Headwaters, which could include remote coaching and support services. One participant indicated that the purpose of such check-ins would be to "identify those areas of most concern and continue investing in those programs and services that provide for positive culture changes."

Another community leader suggested that Headwaters conduct a needs assessment for local family and child service providers, through which they could "help identify a target audience of local service providers to children/families… invite them to a conference/meeting to discuss the findings of the survey, plan to address the needs, and follow up quarterly with an advisory committee."

Inclusive Community Building

Many respondents provided an appeal to Headwaters to promote and encourage programs that incorporate social change, diversity, equity, and inclusivity. Grantees shared ideas about how Headwaters might accomplish this by modeling the behavior for others in the community. One suggested spotlighting Justice, Equity, Diversity, and Inclusivity (JEDI)-informed activities and those leading these efforts. Another would like to see experts and facilitators made available to assist at the local level and to aid in vision and mission development. One posited the idea of a community forum to support local efforts and programs, bring communities together, and erase divides. One grantee voiced a desire for support from Headwaters that brings "more awareness to and opportunity for connection and recognition of diversity within MT communities."

Another grantee requested support in changing a dominant cultural narrative: "Montana has a self-reliance and personal responsibility frame that sometimes keeps us all from reaching out for mutual aid and support. Providing support to erase these cultural frames would help to bring more mutual support and community cohesiveness."

Facilitation of Networking & Coordinating Collaborative Approaches

Multiple grantees drew attention to a need for networking opportunities with community members to help create a coordinated approach and to facilitate better organization of groups and campaigns to combat community issues. In pursuit of these goals, grantees offered creative suggestions including hosting events. One respondent highlighted a particular need for Headwaters to "identify and provide resources to help facilitate meaningful relationships between Tribal Healthcare providers and non-tribal agencies. As a non-tribal-affiliated agency, we are finding ourselves unable to effectively share the resources we hoped to due to a lack of collaboration or relationship with Tribal Healthcare providers. It would be very helpful to host some sort of event so that leaders from more isolated communities could become more aware of each other, and as a result, provide more access to services."

Support for Education & Learning

Grantees frequently expressed a hope for Headwaters to enrich education and schooling in our community. They particularly signaled a need for intervention at the pre-school and pre-kindergarten stages and establishing preschool/kindergarten prep for all Montana children. One grantee explained: "Montana still is one of the only states that does not have something in place for preschool for our children. Often children are attending kindergarten and they are not prepared. However, working Montana families cannot afford to continue paying for childcare or a preschool program, so they send them to school. It all goes back to education and support to know what is best for each child and family.

Some children are ready for school at age 5 but some are not! What is available to a family? We see many families in one of our programs get their children removed and they go through our program and either get their children back or they lose their rights. Then we see that family again in a few years back in the same program. We have to help change this and help families not stay in the same cycle they maybe grew up in. More support and resources are needed in Montana through education and financial assistance."

Another grantee hoped that Headwaters could lead by example and expand post-secondary education, making it more affordable for young people. They noted that "education fosters critical thinkers who are generally more open-minded about those who are "different" than their culture. MCCF has 5 scholarships for graduating seniors, and only three students applied." They further suggested that Headwaters focus their efforts to "motivate students to attend college, as a start. Perhaps Headwaters could partner with MCCF to better understand the reasons why students aren't seeking college education and give those who want to get an education a 'leg up'."

Supporting Sustainability

Several respondents referred to the need for sustainable efforts for communities, programs, and individuals. One participant linked sustainability to "supporting/funding statewide efforts for cultural change in MT, *e.g.,* Double SNAP Dollar efforts supporting food sovereignty in MT Native Communities."

Another grantee envisioned Headwaters becoming involved in the "creation of a healthy local food campaign and poverty simulations" so that our community may better understand the difficulty faced by those with limited income and resources.

Others called for Headwaters to "fund smaller local, trusted organizations and projects to provide services promoting long-term sustainability and community buy-in" and "more local grants."

Informed Leadership & Creating Space for Change

Across several responses, a theme emerged for Headwaters to create a tangible space and opportunities for change in the community. One grantee suggested funding and providing meeting spaces for workshops and conferences promoting positive cultural change.

Another grantee recommended that Headwaters provide "funding for transforming community approaches to issues (*e.g.,* Hardwood Institute Model)." This grantee opined that funding such efforts would assist in achieving their vision of making their community "a laboratory for positive, civil discourse and social change."

Several grantees called for assistance with leadership training and development. One respondent shared: "we need top community leaders to advocate for our underserved and low-income populations."

Barriers to Leadership Development

The most commonly identified barriers to leadership development include:

1. Lack of funding to pay for training (43%)
2. Lack of staff time to attend leadership training (36%)
3. Lack of knowledge about the range of available leadership trainings (36%)
4. Lack of culturally appropriate or culturally meaningful activities or opportunities (16%)

Other barriers included COVID-19, feeling too burnt out to attend, or not seeing the value in attending a training when there is little accountability for action or implementation of new ideas, skills, or approaches.

COLLABORATION & NETWORKING

Most (61%) grantees are currently engaging in coalition work or they are a member of a community impact group. Only one-quarter (25%) are not, and 9% are unsure. Similarly, 75% of grantees are members of an advisory council or something similar, with 20% not participating in these types of collaborative groups.

Grantees were almost evenly split in their assessment of whether their staff have sufficient time and capacity to participate in collaborative groups, with 50% reporting that, in general, staff have time and resources to participate in a meaningful way, while 44% reported that their staff do not have enough time, resources, or support to participate.

Barriers to Collaboration

The most common barriers to engaging in successful collaborative work include:

1. Lack of staff time to participate (36%)
2. Lack of funding to compensate staff for their time working in a collaborative group (36%)
3. Not knowing about or being invited to participate in a coalition or advisory council (11%)

Approximately 5% (n=4) of grantees reported that there are not any coalitions or working groups dedicated to their issue, and only 4% (n=3) organizations reported that they have found coalition work to be unhelpful.

Collaboration Among Headwaters Grantees

Many grantees expressed a desire to work more collaboratively or to be in more direct conversation with other Headwaters' grantees. The reasons for wanting more communication and collaboration opportunities include sharing best practices and lessons learned with one another (58%); learning more about what other organizations are doing (57%); sharing resources (52%); discussing barriers and brainstorming potential solutions together (50%); and implementing ways to support each other, such as a social media takeover to promote the work of other organizations and to increase awareness and supporters (41%).

Potential Resources or Convenings

Grantees were asked to reflect on whether their organization would benefit from a range of potential new resources or gatherings that Headwaters could support. Eighty-three percent (83%) expressed the notion that it was very likely or likely that they would benefit from an annual virtual gathering where Headwaters' grantees could share their work; 81% endorsed the idea of an annual in-person convening and 80% support the idea of a regional gathering.

Approximately 79% like the idea of a grantee listserv where organizations can post information and communicate with one another; 78% support the idea of peer-to-peer coaching and mentoring.

While 66% of grantees endorsed the idea of sharing services for communications and marketing, 31% reported that this would be unlikely to benefit them. Similarly, while 59% reported that shared administrative functions such as bookkeeping and payroll are likely to benefit them, 37% found this unnecessary. Grantees were almost evenly split on whether online collaboration tools such as Slack or Teams would be helpful, with 50% saying yes and 47% reporting this as unlikely to be of much use to them.

Other Ways that Headwaters can Support Grantees

Respondents described several other ways that Headwaters could help to increase organizational capacity of their grantees. One respondent requests help in addressing volunteer burnout and in Board development work, while another would like a shared health insurance network that organizations could opt into to help reduce costs. Another mentions a need for increased public promotion and awareness of the non-profit organizations working in the region, stating that sharing information about services available could benefit many. Finally, one respondent describes a need for more advocacy by the funder at the state level.

CONCLUSION

The findings of the first ever needs assessment conducted among the grantees of the Headwaters Foundation indicate a strong relationship between organizations and the funder with findings representing the views and insights of 90% of the grantees who were invited to participate. Although it is unsurprising that the most common challenges related to organizational capacity and leadership development are centered on the need for more staff, time, and resources, it is clear that Headwaters grantees hold an optimistic view of the future of their organizations and articulate a shared vision for more equitable and just communities across northwestern Montana.

Grantees are energetic about engaging in more effective advocacy efforts. They are united in their desire to better serve their communities with increased internal monitoring and evaluation efforts to document the impact of their work. They understand the need to educate the public and policymakers on the importance of their work and to increase the awareness of their services through traditional media, social media, and accessible websites. Grantees express a desire to be in partnership with one another to learn from each other, to share resources, and to strategize and implement solutions to cross-cutting and systemic issues.

These findings establish a baseline, a point-in-time understanding of the concerns and goals of organizations across northwestern Montana. This report provides a potential roadmap for Headwaters as well as grantee organizations as they identify and implement strategies to guide future efforts.

APPENDIX A

Leadership Training Opportunities

Respondents provided a list of different programs and sources for leadership training and development. Those responses are listed below.

- Leadership Montana

- Brene Brown

- CADCA leadership training

- Communities that Care

- Montana Non-profit Association trainings (Catalyst, board governance, fundraising, HR

- Diversity, Equity, and Inclusion (DEI) trainings

- Strengthening the Circle

- AMP sponsored by Western States Center

- National Alliance of Concurrent Enrollment Partnerships

- Personal Development Training and Education

- United Way Worldwide trainings

- Leadership Flathead Reservation

- Provider Resiliency Training

- Midwest Academy (community organizing training)

- Community Health and Development (University of Kansas)

- Co-creative trainings

- Orton Family Foundation (coach certification program; Heart & Soul program)

- Flathead Valley Community College (leadership series)