

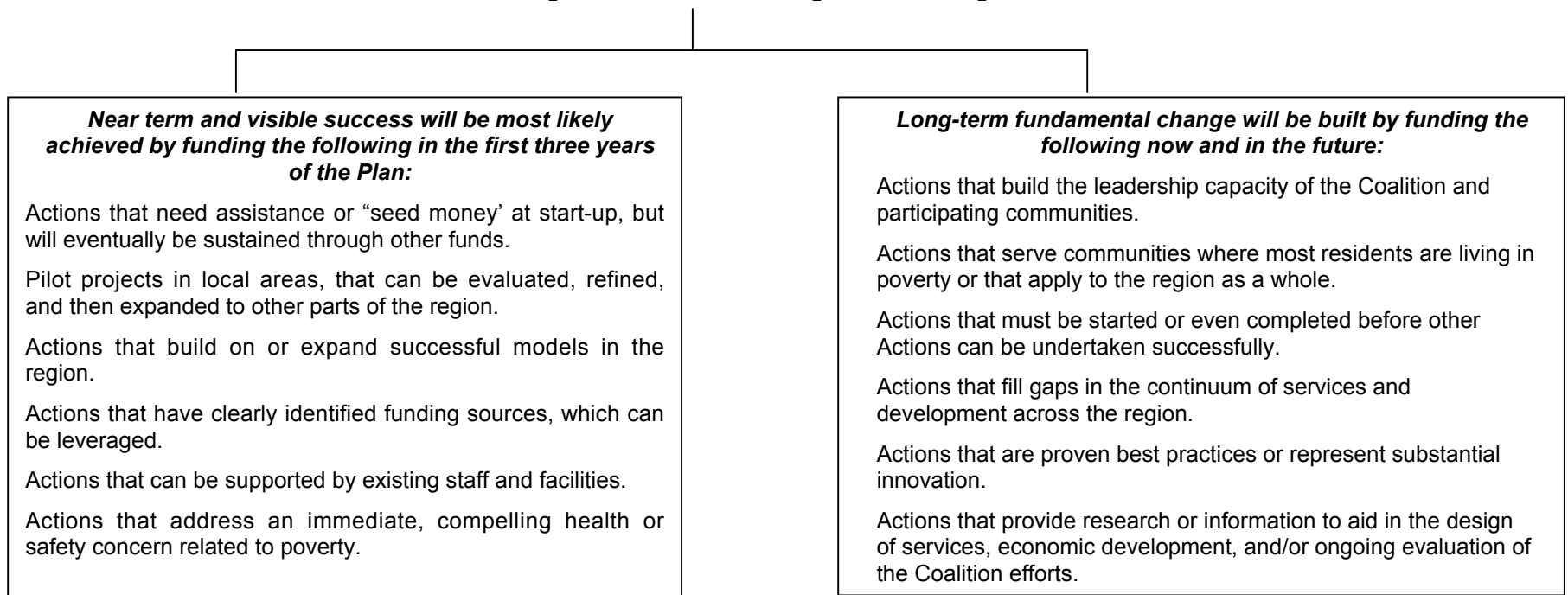
*Policies and program priorities for the use of Northwest Area Foundation Funds*

The Financial Policy Framework also sets guidelines specifically for allocating dollars from the Northwest Area Foundation, if Northcentral Montana is selected as a partner.

A critical policy is to balance funding of near-term and visible successes, while funding and building a foundation for long-term fundamental change. The Coalition is fully committed to actions that will only see fruition in a decade or longer, but also considers it essential to demonstrate to the communities across the region that this partnership between NWAFF and Northcentral Montana can make a difference to people’s lives by reducing poverty.

Two sets of guidelines for allocating funds were therefore established, one for near term successes and one for long-term fundamental change. These guidelines are to serve as the decision screens, or filters, as decisions are made over time as to how to most effectively use NWAFF funds to reduce poverty, while balancing near-term and long-term needs.

**Guidelines for Allocating NWAFF Funds Balancing Near and Long Term Benefit**



A third set of guidelines were established to serve as programmatic screens for allocating NWAFF funds in the early years of the Plan implementation. It is expected, as described earlier, that as the Plan unfolds and evolves, other programmatic priorities and decision screens will emerge. These guidelines set four priorities.

1) The Coalition placed the highest priority on expanding and sustaining the efforts of the Coalition to reduce poverty. This includes:

- Development of community leadership at the local level,
- Grants to low-income persons to enable their participation in the coalition,
- Grant writing and research to support existing organizations and develop new approaches across the region,
- Ongoing evaluation and improvement of the plan, and
- The support of a small staff and office for the coalition.

In the early years of the partnership, it is expected that the Northwest Area Foundation will be the primary funder of the Coalition, but that over time other funding sources, including local money, will make substantial contributions and the role of the NWAFF will diminish.

2) Another priority is the support of education and learning strategies and actions, which are present in all strategic directions. These are also part of building community capacity and focus on:

- The sharing of the different cultures in the region and knowledge and acceptance of each other,
- Reconciliation between different cultures and communities,
- Expanding and deepening the support of and 'buy-in' to the Community Ventures Coalition, and
- Helping individuals develop the skills needed to move out of poverty, such as job skills, GED and high school diplomas, financial fitness, and home buying and maintenance

3) A third priority area is the building of healthy communities for the generations to come. This includes efforts such as:

- The development of healing centers and other strategies, which will reduce addiction and support people with mental illness,
- The enhancement and expansion of prevention programs such as the "Health Watch," and
- Raising the quality and quantity of childcare available, enabling parents to work and children to learn and be successful.

4) The fourth priority area is removing some of the barriers to moving out of poverty in ways that will also demonstrate to the communities at the onset, the potential impact of the Community Ventures Project. This may include efforts such as:

- Housing development on the reservations,
- Housing rehabilitation in rural communities, and
- Free voice mail and financial or credit assistance for telephone service.

### ***Proposed Budget***

In applying the guidelines and policies of the Financial Policy Framework, a budget was developed, describing the preliminary allocation of funds from the NWAFF (if Northcentral Montana is selected as a partner), and the expected funds from other sources, as well as, in-kind contributions.

The Northcentral Montana Community Ventures Project is requesting approximately \$13 million from the Northwest Area Foundation over ten years for high priority strategies and actions that are expected to require a total of \$74.6 million. Northwest Area Foundation funds will be used to:

- Provide initial support for the development and administration of an organization, which will sustain and guide the implementation of the poverty reduction plan.
- Support the development of leaders at all levels of the community and to expand the region's capacity to reduce poverty.
- Support program planning, research in best practices and specific needs assessments.
- Support ongoing evaluation of collaborative processes and outcomes of poverty reduction strategies.
- Provide technical assistance and support in grant writing and fund development.
- Provide start-up funds and funds which can be used to leverage or match other sources of funds including private and public grants, community support and in-kind services for specific strategies. Many strategies assume that initial startup is sponsored by the Coalition, and later

transferred for ongoing sponsorship to an existing community agency.

In fulfilling the policies and priorities of the Coalition, this preliminary budget also:

- Supports near-term projects, which will provide early visibility and have meaning to people living in poverty, and long-term strategies, which will lead to long-term fundamental change and improve the life of communities.
- Supports strategies that can be implemented region wide, and strategies which will be piloted in one community and expanded over the ten-year period to others.
- Initiates some actions in 2004, while others are assumed to be initiated later, to give time to expand the capacity of communities to support and participate in the endeavor.
- Acknowledges that some actions are of greater importance to some communities than others (for example the expansion of housing stock is critical for reservations, while the rehabilitation of housing is more important in farming communities) and provides a balanced approach to needs across the region.

### *Organization of the Budget*

The budget for the implementation of the strategies and actions was originally organized by the themes that bind the strategies and actions together, and the activities needed to sustain and expand the Coalition.

This supported the priorities and approach set by the Financial Policy Framework. In this way, it also facilitates thinking about funding strategies or actions that are inter-related in concert, and initiating them in ways that make the best use of staff, volunteers, dollars and other resources. A summary budget, by theme, is provided here, and the detailed budget is provided in Appendix F.

To aid the reader in easily matching the budget with the description of the Plan in Chapter 5, a summary budget is also presented here, organized by strategic direction. The detailed budget by strategic direction is also in Appendix F and financial information about each strategic direction has been included in Chapter 5.

Both budgets use a short hand to reference a specific strategy and action. For example EC 3.1 refers to Economy Strategy 3 Action 1.

Both budgets have an identical section called “Sustaining the Plan,” which encompasses the activities and resources needed to support the work of the Coalition itself over the coming years. (Chapter 7, Building Community Capacity to Change, describes in detail the activities and organization of the Coalition that will be undertaken to sustain the poverty reduction plan.)

The budget encompasses the strategies and actions for which Northwest Area Foundation support is being requested. These are matters of priority and passion for the Coalition. Planning for the budgeting, prioritizing, and funding of other actions, many of which are under consideration by other organizations, will require further work by partner organizations and/or the Coalition. Not included in this report to the Northwest Area Foundation, but available to the coalition, are draft expense budgets, offers of in-kind contributions, and proposed revenue sources for a number of the actions which were not prioritized for NWAFF funding.

### **Themes that Bind**

- ❖ *Building social capital*
- ❖ *Removing barriers*
- ❖ *Increasing assets and available capital*
- ❖ *Assuring access and use of technology*
- ❖ *Using the land while protecting it*
- ❖ *Building healthy communities*
- ❖ *Learning as a tool and as an end*

### **Strategic Directions**

- ❖ *Community*
- ❖ *Health*
- ❖ *Children, Youth and Families*
- ❖ *Economy*
- ❖ *Education*
- ❖ *Housing*
- ❖ *Transportation*

### *Other Funding Sources*

Coalition members have already begun the process of identifying and seeking additional funds. Existing grant sources, as well as potential public funds and private donors, have been identified for many strategies and actions. Discussions with other potential partners, such as the Center for Ethical Leadership, the U.S. Forest Service, the Montana Office of Public Instruction, six regional banks, Great Falls medical community, Gannett Foundation, local school districts, MSU-Northern, HUD, the Montana Housing Network, the Rocky Boy's Health Clinic, and the Indian Family Health Center in Great Falls have also been initiated. The current planning grant from the Northwest Area Foundation and the Poverty Reduction Plan has provided many organizations the opportunity and the framework to begin the development of new services and directions. As an example, the Alliance for Youth in Great Falls, in partnership with the Coalition, applied for and received a planning grant of \$16,498.00 from the Montana Board of Crime Control and expects to receive matching funds from the Montana Community Foundation to support the development of the youth asset based community development project (Community Strategy 1.2).

Appendix F also includes a listing of potential funders identified by the Coalition to date.

### *In-Kind Contributions*

The process of developing strategies and actions brought out the generosity and commitment of the people and organizations involved in the planning. Even at this early stage, many organizations have stepped up to indicate that they are willing to provide space, staff technical assistance, and/or leadership in carrying out specific strategies. These are included in the detailed budget provided in Appendix F.

In some respects, this budget is simply a model of how the Coalition thinks about the implementation of the Plan. The farther out in time it goes, the less accurate and the greater amount of change is certain to happen. We look forward to the opportunity to partner with the Northwest Area Foundation in determining how best to apply and leverage funds in order to carryout the poverty reduction plan.