

# **Recommendations and Final Deliverables**

## **Tri-Town Wellbeing Initiative Strategy**

Prepared for Josh Arneson

Prepared by Julie Rusk and Catalina Langen, Civic Wellbeing Partners

07.09.2021



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## I. Agreement and Overview of Work

On May 1, 2021, Civic Wellbeing Partners entered into an agreement with the Town of Richmond, VT to carry out the following deliverables by May 30, 2021:

*“Support development of a project scope for launching a wellbeing initiative in Richmond and the surrounding region, including the framework and description of a new staff position to support the wellbeing initiative. Help clarify purpose, define goals, and generate buy-in from local and regional organizations. Through facilitated discussion, support decision-making regarding the position’s oversight. In partnership with Recreation Committee liaisons Stefani Hartsfield and Christina Keating, conduct:*

- *Up to 2 facilitated group sessions*
- *Up to 3 individual interviews*
- *1 stakeholder survey to gain additional perspectives*

*Develop DASH Grant application, to include:*

- *Summary of project purpose, goals, partnerships, and activities*
- *Draft of staff position description to support wellbeing initiative consistent with existing Town policies, including the Personnel Policy, and practices*
- *Budget for staff position and additional expenses associated with first-year implementation*
- *Initial draft of DASH Grant application with one set of revisions”*

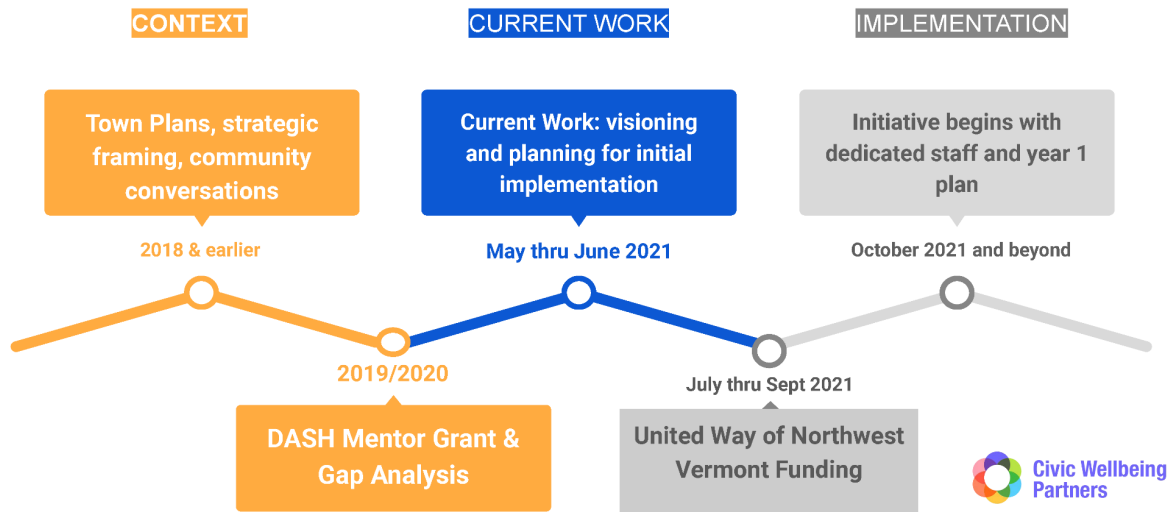
In the process of this work, the following adjustments were made:

- An extension of the agreement (until June 30, 2021) was requested in order to allow time to complete the deliverables as outlined in the agreement.
- Through our work on this project, we learned that the Spring 2021 Data Across Sectors for Health (DASH) Community Impact Contract funding application would not become available until late Summer 2021 due to staffing changes at the Illinois Public Health Institute who oversees grant management nationally for the Robert Wood Johnson Foundation.
- However, another potential source of funding for this initiative was soon identified through the United Way of Northwest Vermont, who approached the local team of champions based on multiple years of advocacy work in the tri-town area. Our original DASH Grant Application draft process then shifted to apply for the United Way funding, in partnership with key allies from the UVM-Cooperative Extension Strengthening Families / PROSPER team to create eligibility as a Prevention Center of Excellence awardee and expand the Chittenden Prevention Network.

- In lieu of a formal Stakeholder Survey, we reviewed background documents (including past community surveys), expanded the stakeholder feedback network through the addition of Chittenden Prevention Network members, attended additional meetings, informal follow-ups and emails, and prepared a final presentation for the Richmond Selectboard.

As outlined in the agreement, all adjustments were made in consultation with the designated Recreation Committee liaisons Stefani Hartsfield and Chrissy Keating.

### A. Timeline



### B. Summary of Wellbeing Initiative

In coordination with Recreation Committee liaisons, we developed the following vision and summary of the proposed Wellbeing Initiative.

*Chittenden East communities have an opportunity to strengthen and unify our approach to improve community outcomes for health and wellbeing. Building on experience from other communities across the country and the world, the goal is to apply a wellbeing approach grounded in equity that builds off of the recreational assets and related opportunities offered in our region. We'll use data and stakeholder conversations to understand the current state of wellbeing, what the community assets are and what is needed, to deliver results for Chittenden East communities.*



## **C. Inventory of Background Documents for a Wellbeing Initiative in Tri-Town Area**

### **Town Plans**

- [Richmond Town Plan](#)
- [Bolton Town Plan](#)
- [Huntington Town Plan](#)

### **Regional Plans and Documents**

- [Community Health Needs Assessment - Chittenden and Grand Isle Counties, VT](#) - Regional wellbeing data.
- Vermont Department of Health: [Strategic Prevention Model](#), [Youth Risk Behavior Survey](#)
- [Chittenden County Prevention Network](#)
- [Beyond COVID Recovery Organizing Toolkit](#) - Education Justice Coalition of Vermont

### **Gap Analysis & Data Sources**

- [Data Across Sectors for Health \(DASH\) Grant-Funded Gap Analysis Dashboard](#). Maps community partners, connections, strengths, and gaps.
- [Richmond: Our Town. Our Future.](#)
- [RISEVT Vermont County Data](#)
- ICSRA Planet Youth Prevention Data
- 2019 Bolton Resident Survey

### **Additional Points of Reference and National Models**

- [All In: Data for Community Health](#)
- [Centers for Medicare & Medicaid Services](#)
- [Planet Youth](#)

## II. Process: Stakeholder Interviews & Facilitated Group Sessions

### Interviewees

**Christine Werneke** Richmond Selectboard Chair

**Bob Gradeck** Former DASH Grant Mentor for Town of Richmond

**Cathie Buscaglia** Howard Center, Director of Innovation & Special Projects

**Ravi Venkataraman** Town Planner, Town of Richmond

### Richmond Recreation Committee - Meeting Participants

**Kirsten Santor**, Chair

**Chrissy Keating**, Secretary

**Martha Nye**, Member

**Stefani Hartsfield**, Member

**John Linn**, Member

**Kate Kreider-Anderson**, Member

**Mark Fausel**, Planning Commission Rep

**Naomi Hahr**, Alternate Member

**Rich Roberge**, Senior Center Rep

**Ravi Venkataraman**, Town of Richmond

**Kurtis Swahn**, Intern

**Ariana Matthews-Salzman**, Farmer's Market

**Justin Graham**, RiseVT

**Trish Healy**, Community Member

**Julie Rusk**, Civic Wellbeing Partners

**Catalina Langen**, Civic Wellbeing Partners

### Tri-Town Stakeholder Group

**Sarah Kleinman**, UVM-PROSPER

**Kara Bissonnette**, UVM-PROSPER

**Justin Graham**, RiseVT

**Chrissy Keating**, Recreation Committee & Bolton Representative

**Amanda Froeschle**, Vermont Department of Health

**Amy Carmola**, United Way of Northwest Vermont

**Stefani Hartsfield**, Hartsfield Health Systems Consulting

**Julie Rusk**, Civic Wellbeing Partners

**Catalina Langen**, Civic Wellbeing Partners

### Themes

- There is an overall theme that connecting the resources in the towns and better use of data is needed. This includes coordination of committees within and between the towns working on the same issues. Distances and lack of easy physical connectivity also underscores the need for and value of better alignment across and within towns.
- Longterm residents feel connected, newer residents do not.
- Organizations are often operating as volunteers, playing important roles but not thinking about ways to sustain the organization nor focusing on the system as a system.
- Community trust is an asset in Richmond and the region.
- Community mental health is resourced regionally, with community health teams, social workers, co-hired and embedded positions.
- Wealth gaps are an issue.

- Some of the current opportunities locally include a re-envisioning of the Town Center, policing issues, infrastructure, and balancing assets.
- In designing this initiative, wellbeing tenets should be seen as a guiding force that brings existing assets together; not siloed.
- Interest in what comes up based on the data we've collected, what models seem best for Richmond's context. Looking into feasibility, interest/need for this work, what's the data, who are we impacting. Make sure that this initiative has relevance.
- Interest in focusing the wellbeing initiative on prevention efforts and connecting with existing initiatives.
- Early childhood issues may be an entry point into the wellbeing work.
- Browns Court is a hot button issue locally. How could infrastructure improvements be framed through the lens of wellbeing?
- Goal for more participation at all levels of recreation in general.
- Mental health issues and anxiety related to COVID are very much present and transcend the region's socioeconomic diversity.
- Addressing issues of access, disparities, and building on assets.
- PROSPER has capacity to support the wellbeing initiative; interest in expanding existing facilitator and other trainings, using a public health messaging approach. Through PROSPER, parents are getting connected in ways they might not have otherwise. So, the focus is on youth and families.
- How to best build from the existing infrastructure? This should include mentoring, capacity building, and professional development for existing organizations and partners.
- Interconnections of this work means that a single position couldn't do it all; a partnership will be needed.
- What do families really need? Might need to know what's going on, what are the opportunities, how can they access?
- Word of mouth is the main form of information sharing at the strategic partnership & leadership level, just like community level. This is another issue.

### III. Recommendations and Work Products

#### A. Recommendations

Recommendation	Details
<p>This is the first phase of something new, which requires coordinating existing assets while <b>bringing people along</b>.</p>	<p>The Tri-Town area has assets to build on; in summer 2021, the budding wellbeing initiative will <b>leverage the strength of local prevention efforts</b>, while developing and testing out the larger framing of wellbeing.</p>
	<p><b>Messaging matters.</b> Work is needed to develop a <b>shared language and definition</b> of a wellbeing initiative. Clearly defined messaging about what you’re doing and why should be a top priority. Strategies to continually reinforce your messaging are equally important, as is being able to <b>adapt messaging for different audiences</b>.</p>
	<p>Wellbeing is about more than health and prevention - but how do the community and leaders of this work define it within the context of the Tri-Town area. A challenge can be that people confuse “wellbeing” with “wellness,” and some dismiss it as “happiness.”</p>
<p>There is also not always an intuitive understanding that wellbeing is about <b>using data to ignite significant process change</b>.</p>	
<p>Dig into the most <b>important community conversations</b>.</p>	<p>The conversations haven’t quite gotten to equity and the issues of <b>people at the “margins”</b> of the systems we are discussing. The pain points for these groups have not been expressed <i>directly by</i> members of these groups. For example, engaging the Richmond Racial Equity ad hoc group.</p>
	<p><b>Launching off points</b> noted below reflect back what we have seen as the key community concerns and issues. Use a wellbeing framing, build new understandings, to meet existing needs.</p>
	<p>How might we <b>capture the imagination</b> of the community to see the larger connections?</p>
<p><b>Measurement</b> is key.</p>	<p>Among the assets needed in the future of this initiative are a unified framework and a data dashboard which includes <b>outcome metrics, performance goals, benchmarks, and RBA (results-based accountability) methods</b>.</p>
<p><b>Leadership matters.</b> So</p>	<p>We recommend building a <b>wellbeing leadership coalition</b> around the individual and shared interests of the Richmond elected officials and key stakeholders. This may extend to and include Bolton and Huntington</p>

<p>does <b>convening the right team.</b></p>	<p>electeds, to build upon existing or establish new opportunities for a strong regional focus.</p>
	<p>Interconnected thinking and partnerships are as important as direct services. Help people see that the talk of using data and collaboration helps result in better outcomes. Think differently about dollars coming in from the state and federal government. Leadership-level allies within the organization should act as connectors and problem solvers who will champion the work across sectors and projects.</p>
	<p>We recommend defining roles to more formally name the leadership of Stefani Hartsfield and Chrissy Keating as local community leaders with an interest and expertise in this work.</p>
	<p>It takes coordination and time to bring people along, establish messaging, bring people together and manage processes and assets strategically. A <b>staff position</b> is needed to develop and maintain this work effort.</p>
<p><b>Develop a funding plan. Use a mix of funding strategies: one-time, ongoing resources, and securing innovation grants.</b></p>	<p>The <b>sustainability of this initiative</b> is important and should be planned for from the start. There are a range of options.</p>
	<p>The <b>DASH CIC Grant</b> (late 2021) is a source of one-time funds. (See <i>Attachment E</i>). The attachment is an example application from 2020. DASH Mentor program participants like the Town of Richmond, who were successful in their planning phase, are well positioned to receive funding through the <a href="#">DASH Community Impact grants</a>.</p>
	<p><b>Incorporate this work into existing projects</b> and funding. For example, identifying funded projects that might align with and elevate a wellbeing framework to advance and fund the work (see the <i>possibilities for launching</i> below for ideas).</p>
	<p>At the <b>state and national</b> level, funding initiatives (including COVID relief) are rolling out. Demonstration of a track record of collaboration and data-driven approaches will position the Tri-Town area to be competitive for these funds.</p>
	<p>Identify <b>longer-term funding</b> for this initiative in order to sustain and grow the wellbeing work locally.</p>

You have many great <b>possibilities for launching:</b>	
<b>Richmond Town Center Visioning Initiative</b>	How might Richmond use a wellbeing lens to re-envision this historic center? How might we bring together dimensions of wellbeing such as sense of place, health, learning, economic opportunity, community, and personal outlook to co-create a vital community hub?
<b>Brown's Court</b>	There is an opportunity to re-envision Brown's Court as a multi-use place that addresses the needs of different segments of the neighborhood population. With a wellbeing lens and data, how could a comprehensive review create meaningful uses for the space at Brown's Court?
<b>Town Website</b>	The Town of Richmond's new website has an opportunity to apply a wellbeing framework with a goal of coordinating local assets and events. By shifting the framing of the website from organizing by city department to user experience, wellbeing could make intuitive sense to bring together services and opportunities for residents.
<b>Senior Center</b>	The Senior Center could provide a great opportunity for leadership development and building community understanding of wellbeing, starting with engaging this volunteer base around issues important to seniors.
<b>Managing partnerships/ volunteers</b>	There is a need to coordinate organization-level and volunteer-level efforts in and across the Tri-Town area. By centering strategies for wellbeing at the heart of the initiative, leaders can effectively coordinate assets.
<b>Youth</b>	There are real needs and possibilities for engaging a youth perspective on multiple local issues. In the next few months, pending grant funding, PROSPER-UVM will provide stipends and engage with youth and their families through a prevention and wellbeing lens. This work will center the issue of substance misuse in teens, as an entry point into a broader conversation about community wellbeing. Other opportunities for youth engagement with the wellbeing movement in the future include participation in the <a href="#">Wellbeing Economy Alliance's Youth Hubs</a> .
<b>Mental health</b>	While mental health services are priorities for the region, there is currently a lack of acute care facilities locally. By digging into mental health issues through a more comprehensive wellbeing lens, we could track disparities in sense of belonging, hope, and overall outlook, to get a picture of what the need for services really are in the community.

<b>Economic Inequality</b>	In order to understand the gaps in services, transportation and public infrastructure, engage those who are most impacted by public services and would benefit the most from good design in these areas. As the population of the Tri-Town region and beyond has existing economic inequalities, this initiative, designed with all in mind, could begin with centering the voices of those struggling economically. Who in the community is dealing with stress about making credit card or other loan payments? Who in the community could not handle an emergency expense of more than \$500? These are some of the indicators that can help pinpoint where action is most needed.
<b>Equity</b>	How might we build strategies for equity early on in this work? This could include engagement with the <b>Richmond Racial Equity ad hoc group</b> in designing and prioritizing programs for wellbeing. This may also include an analysis of the initiative at periodic points: Who benefits from this work? Who is burdened? Who decides?

**B. Presentation to Richmond Selectboard**

Civic Wellbeing Partners presented an update on this work at the **Richmond Selectboard Meeting** on June 21, 2021. The presentation includes: a timeline and update of work completed; documents reviewed; key partners; framing for the initiative; community assets; possible launching off points for the wellbeing work; important challenges and needs; and a funding opportunity from United Way of Northwest Vermont. To review the presentation shared at this meeting, please see *Attachment A* to this document.

The following outlines a summary of the discussion and direction from the Selectboard to Civic Wellbeing Partners:

- Concerns about who would be leading and coordinating this effort, whether this is the role of the Town or others. Perspective that the usual conveners of initiatives of this nature in Richmond are the nonprofit entities. Another perspective was shared that positions focused on wellbeing, prevention, coordination & data will attract funders and position the Town to apply for and receive funding down the line. *Selectboard did not acknowledge the need at this time for a dedicated position to act as a community wellbeing coordinator as outlined in the draft job description.*
- There was an interest in making investments in a coordinated, strategic way. The Town was willing to oversee work being carried out by others. *Selectboard unanimous decision: Direct Civic Wellbeing Partners to submit a United Way funding application on behalf of the Town of Richmond and its partners as based on the presented concept*

*plan, by the end of June 2021. Direction was given that this proposal should include administrative overhead for the Town.*

### **C. United Way of Northwest Vermont Funding Request**

Based on the above direction from the Selectboard, the United Way of Northwest Vermont Funding Request was submitted by Town Manager Josh Arneson, with the Town outlined as the grantee and PROSPER-UVM and Civic Wellbeing Partners as the subcontractors for this work. See *Attachment B* for the Draft Proposal and *Attachment C* for a copy of the Final Application.

### **D. Wellbeing Staff Position**

As outlined in the agreement, a position description and budget were drafted. The purpose of the position description is to shape and scope out this needed coordinating role. The budget range provided assumes a position title of Community Wellbeing Coordinator, with the Town of Richmond as the hiring agency. However, this position description may be scaled up or down from a Community Wellbeing Coordinator to an Executive Director title, depending on the hiring organization, community need, and initiative scope. To review the position description, please see *Attachment D*.



## IV. About Civic Wellbeing Partners

### Who We Are

We are a startup non governmental organization with deep roots in local government leadership, systems change, and community engagement. We provide support to communities in the United States and across the globe working to implement strategies for civic wellbeing, from design through implementation and analysis.



#### **Julie Rusk**

*Founder*

Julie brings **more than a quarter century of experience in local government and nonprofit management**. Julie previously served as the City of Santa Monica's first Chief Civic Wellbeing Officer, and prior to that role as Assistant Director of Community & Cultural Services, where she oversaw a range of initiatives in **human services, culture, education, recreation, and place-making**. She launched the Cradle to Career Initiative, a public/private partnership to help youth flourish in every aspect of their lives, from conception to careers. That groundbreaking program, like the Wellbeing Project, drew on data from multiple sources and created the Youth Wellbeing Report Card. Julie is known for approaching social problems with **compassion**, an instinct for **collaboration**, and an acuity for **measurement** to ensure that programs are effective.



#### **Catalina Langen**

*Co-founder, Program Manager*

Catalina lifts up promising practices, supports **creative engagement strategies**, and uses data to drive her work. She believes that **equity-forward solutions** have the power to strengthen the wellbeing of our communities, and oversees the Wellbeing Microgrants program, supporting residents as they **advance their ideas for community wellbeing**. Previously, Catalina worked at California State University San Marcos developing **civic learning** programming, creating opportunities for students to connect with community leaders and city officials, dialogue about democracy, and serve the community. A Southern California native, Catalina graduated from the University of California Santa Barbara and lives in Los Angeles.

## What We Bring

- **Tools** for framing your own wellbeing framework and action plan (including replication guides, a playbook for equitable community engagement, and models for new ways of working/transferable pilot opportunities).
- **Analysis of the environment**/landscape of actors across systems in your community.
- **Data**, including banked questions and key indicators.
- **Deep thinking** across dimensions of wellbeing.
- A commitment to and passion for **racial equity** and **language justice**. Wellbeing for all will not be possible without systems adapting to create radically different conditions for the most vulnerable and under-resourced people in our society.
- **Decades of experience** working with dozens of municipalities, local and regional government staff, researchers, and community members on what works, what resonates, and what is measurable.
- **Engaged global and local networks** of people who are advancing wellbeing theory, measurement, and practice in their own ways.

## V. Attachments

*Attachment A: Selectboard Presentation Slides*

# Wellbeing Initiative Update

## Chittenden East Communities

Update to Richmond Selectboard  
Monday, June 21, 2021, 7:00PM

Julie Rusk and Catalina Langen



### Our Work/Who We Are

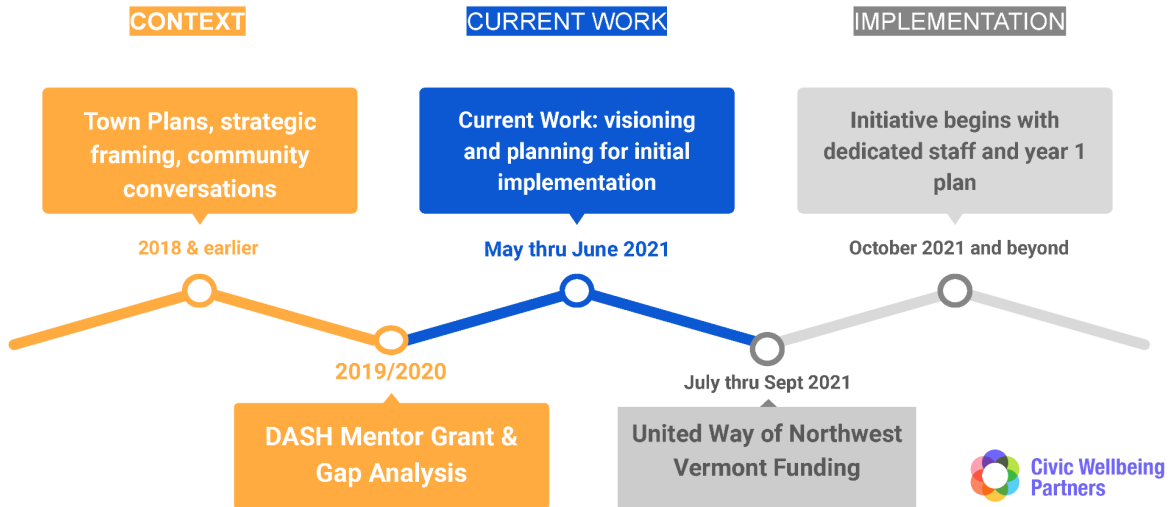


#### What We Bring

- Tools for framing local wellbeing work and action planning
- Data (banked questions and key indicators)
- Deep systems thinking (analysis of the landscape of actors across systems in your community)
- A commitment to and passion for racial equity and language justice
- Engaged global and local networks, deep experience in municipal and community engagement

**Civic Wellbeing Partners is a startup project whose mission is to develop and promote civic innovation through engagement and partnerships. We harness data and create equity-focused solutions to improve the quality of daily life in Santa Monica and beyond.**

## Process: Wellbeing in Tri-Town Area



## Background: Wellbeing Work in Tri-Town Area

### Town Plans

**Richmond:** “We value our unique combination of authentic Vermont character, **diverse local services** and accessible location. We want Richmond to be an affordable and appealing place for people to **live, work, shop, play, and connect**. We will take a **forward-thinking approach** to emerging opportunities and challenges while honoring and strengthening our **close-knit community and rural character**.”

**Bolton:** “**People**. Our vision is to foster community connections, vibrant neighborhoods, and gathering places....  
**Prosperity**. Our vision is to cultivate a fiscally sustainable community that promotes local businesses, encourages options for affordable housing, energy and transportation, and provides the necessary infrastructure and services needed for the **safety, health and well-being of our residents**. **Place**. Our vision is to responsibly steward our natural resources and working farms and forests, and to preserve the health and beauty of our mountains, waterways and wildlife, and access to the outdoors.”

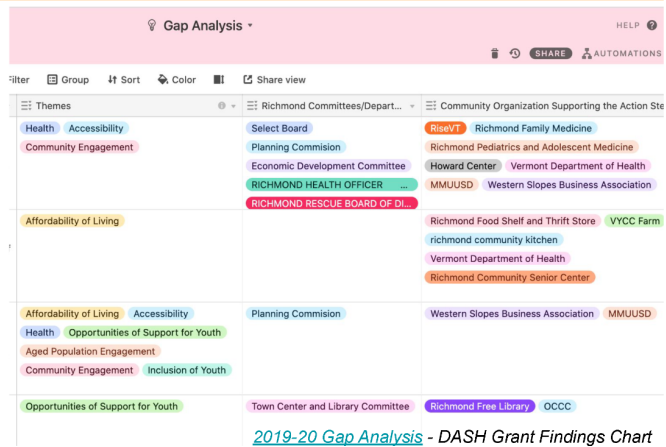
**Huntington:** “Promote a diverse, viable, and creative local economy that allows residents the **opportunity to live and thrive**... Retain and steward Huntington's historic, scenic, and natural characteristics while ensuring the **preservation of its working landscapes for future generations**.... Restrain rapid, large-scale, or otherwise inappropriate growth that would negatively affect Huntington's fiscal condition, **environmental quality**, and/or **rural character**... Promote energy conservation... Support a safe, well-maintained range of **transportation options**.”



## Background: Wellbeing Work in Tri-Town Area

### Gap Analysis Findings

- Institutions are working across areas that contribute to wellbeing like *affordability, accessibility, community engagement, health, opportunity* and more
- **Needs:** strengthen the connections across these areas
- **Opportunity:** *community wellbeing* as strategy for strengthening connective tissue

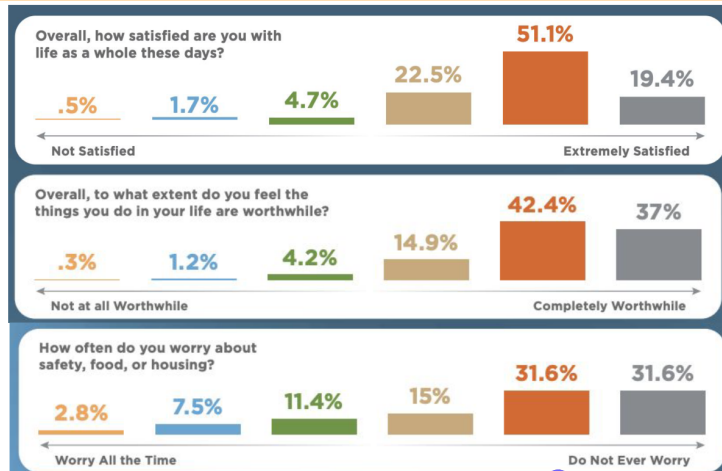


## Background: Regional Wellbeing Data

Community wellbeing data is available **regionally.**

It is still needed **locally.** And it needs to be **put to use.**

[University of Vermont Medical Center - Chittenden and Grand Isle Counties, Vermont Community Health Needs Assessment, 2019](#)



## Background: Regional Wellbeing Partners



[University of Vermont Medical Center - Chittenden and Grand Isle Counties, Vermont Community Health Needs Assessment, 2019](#)



## Wellbeing Initiative: Our Work with Tri-Town Area

	OVERALL STATE OF COMMUNITY WELLBEING <i>How are the people of Santa Monica doing?</i>					
	OUTLOOK					
DEFINE	<b>COMMUNITY</b> <i>How strong is the sense of community &amp; connection?</i> <ul style="list-style-type: none"> <li>- strong local networks</li> <li>- civic engagement</li> <li>- community identity</li> </ul>	<b>PLACE + PLANET</b> <i>Does the built + natural environmental support &amp; promote wellbeing?</i> <ul style="list-style-type: none"> <li>- mobility options</li> <li>- quality &amp; access</li> <li>- pride in place</li> <li>- natural environment</li> </ul>	<b>LEARNING</b> <i>Do people have the opportunity to enrich their knowledge &amp; skill sets across their lifespan?</i> <ul style="list-style-type: none"> <li>- learning status</li> <li>- learning behaviors</li> <li>- access</li> </ul>	<b>HEALTH</b> <i>How healthy is Santa Monica?</i> <ul style="list-style-type: none"> <li>- physical &amp; mental health status</li> <li>- access</li> <li>- healthy behaviors</li> </ul>	<b>OPPORTUNITY</b> <i>Can a diverse population live &amp; thrive in Santa Monica?</i> <ul style="list-style-type: none"> <li>- affordability</li> <li>- opportunity</li> <li>- business diversity</li> </ul>	
MEASURE	<b>Sample Measures...</b> <ul style="list-style-type: none"> <li>- voter participation rates</li> <li>- volunteering</li> <li>- public safety</li> <li>- frequency of social contact*</li> <li>- sense of community &amp; neighborhood identity*</li> </ul>	<b>Sample Measures...</b> <ul style="list-style-type: none"> <li>- public &amp; active transit use</li> <li>- green &amp; open space access</li> <li>- shared/community space access</li> <li>- healthy ecosystems</li> <li>- satisfaction with transit*</li> <li>- perceptions of place &amp; community assets*</li> </ul>	<b>Sample Measures...</b> <ul style="list-style-type: none"> <li>- patrons &amp; service usage</li> <li>- graduation &amp; literacy rates</li> <li>- learning activity participation rates</li> <li>- sense of accomplishment &amp; opportunities to learn*</li> </ul>	<b>Sample Measures...</b> <ul style="list-style-type: none"> <li>- chronic disease rates</li> <li>- emergency response calls</li> <li>- health-promoting activity participation rates</li> <li>- physical activity &amp; healthy eating habits*</li> <li>- work-life balance*</li> </ul>	<b>Sample Measures...</b> <ul style="list-style-type: none"> <li>- income &amp; employment</li> <li>- housing affordability</li> <li>- business diversity</li> <li>- sense of economic security*</li> <li>- satisfaction with mix of businesses*</li> </ul>	
ACT	City Budget, Policy & Operations   Collaboration (Internal & External)   Communication & Engagement					



## Wellbeing Initiative: Overview

Goal of initiative: Using coordinated communication and data to enhance **equitable access to wellbeing and recreation opportunities** in Chittenden East Communities.

**Process Points:** April - June 2021

- **COMPLETE:** Review of background documents and onboarding with Richmond stakeholders
- **COMPLETE:** Wellbeing coordinator position description
- **COMPLETE:** Summary of Wellbeing Initiative
- **COMPLETE:** 3 Stakeholder Interviews
- **COMPLETE:** 2 Facilitated Group Sessions
  - Richmond Recreation Committee
  - Tri-Town Stakeholder Group\*
- **IN PROGRESS:** Funding Opportunity from United Way of Northwest Vermont
- **IN PROGRESS:** Grant Preparation for DASH CIC Grant to be released Aug/Sept. 2021

**\*Stakeholders with Expressed Interest:** Vermont Department of Health, Howard Center, United Way of Northwest Vermont, University of Vermont Medical Center, Mount Mansfield Unified School District, Richmond Recreation Committee



## Wellbeing Initiative: What We've Heard

**Themes & Opportunities for Action**

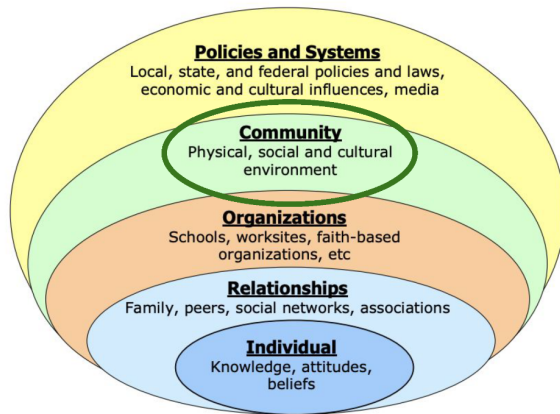
- **Assets:** Community connectedness, mental health, trust, leadership, creativity, interest in collaboration, strong volunteer-led efforts, support for prevention work
- Possible **launching off points for the wellbeing work:**
  - Richmond *Town Center* visioning initiative
  - *Brown's Court* opportunity to reinvision
  - *Town Website* as opportunity for wellbeing framework & asset coordination
  - *Senior Center* opportunity for volunteer management
  - Managing partnerships + *volunteer capital*
  - *Youth focus:* real needs and possibilities for youth perspective on local issues
  - *Economic inequality:* reach out into the margins to design this initiative with all in mind
  - *Equity:* how might we build in strategies for equity early on in this work?
  - *Mental health:* lack of acute care facilities locally
- **Challenges/needs**
  - Getting started while holding the vision
  - Bringing people along in this moment
  - Establishing management and funding for a new staff position
  - Establishing governance and funding to sustain the initiative

**Opportunity/Decision Point:** United Way of Northwest Vermont funding is available for prevention and wellbeing efforts.



## Funding Opportunity: United Way of Northwest Vermont

### Vermont Prevention Model



Adapted from: McElroy KR, Bibeau D, Steckler A, Glanz K. An ecological perspective on health promotion programs. Health Education Quarterly 15:351-377, 1988.

- Vermont Division of Alcohol and Drug Abuse Programs (ADAP) subgrant
- \$10-20k
- Prevention emphasis
- Community wellbeing as framing to broaden and deepen this work
- University of Vermont's leadership in prevention has synergy with wellbeing and have been a compatible organization in this effort.



## Funding Opportunity: United Way of Northwest Vermont

### Concept for Initial Wellbeing Initiative Implementation (July through September):

Focus on Prevention and Wellbeing UVM Extension	Community-wide Connection and Resources UVM Extension Civic Wellbeing	Communication Civic Wellbeing UVM Extension	Planning Civic Wellbeing
<p>Facilitator training for Strengthening Families Program (SFP 10-14) (an evidence based prevention program currently established at Camels Hump Middle School, but could be offered throughout the community in different venues).</p> <p>Advance <b>place-based initiatives</b> (ex: Town Center or wellbeing microgrants).</p>	<p>Community-wide educational opportunity focused on parenting, communication, or emotions.</p> <p>Offering community events and education.</p> <p>Lay groundwork for community infrastructure surrounding upcoming retail marijuana legalization impacts from an economic, equity and health impact on tri-town area.</p>	<p>Building a network of resources for community members, focusing on prevention and well-being efforts; utilizing established mutually reinforcing programs and activities.</p> <p>Advance wellbeing framework and asset coordination through the <b>Town website</b>. As the Town proceeds with website, explore possibilities for a <b>data dashboard</b>.</p>	<p>Plan and support structure for the wellbeing initiative and position</p> <p>Establish ongoing budget to maintain wellbeing and protect community</p> <p>Finalize details related to position (<a href="#">see draft linked here</a>)</p>



## Selectboard Recommended Action

1. The Selectboard approve of the concept of a collaborative effort to apply for this funding opportunity. As presented in the concept, this funding will support continued progress towards goals identified by local stakeholders. Grant applicant will be the Town of Richmond (on oversight), with Civic Wellbeing Partners (on coordination, visioning, use of tools, data, and program development) and PROSPER-UVM (on implementation, prevention work, community engagement, and local coordination functions).
2. The Selectboard direct Civic Wellbeing Partners to submit a United Way funding application on behalf of the Town of Richmond and its partners as based on the presented concept plan, by the end of June 2021.
3. The Selectboard acknowledge the need for a dedicated position to act as a community wellbeing coordinator as outlined in the draft job description [linked here](#) and affirm that the next phase of work will require supporting this in order to sustain the wellbeing initiative based on funding availability.



## Thank You

Feedback & Discussion Welcome

**Julie Rusk**  
[julie.rusk@roadrunner.com](mailto:julie.rusk@roadrunner.com)

**Catalina Langen**  
[catalinalangen@gmail.com](mailto:catalinalangen@gmail.com)



*Attachment B: Draft Proposal*

Draft Proposal for United Way of Northwest Vermont Grant Application

The request form can be found at this link: <https://forms.office.com/r/UczQUF1q6Q>

**Organization requesting funds**

Town of Richmond

**Contact person**

Josh Arneson

**Amount of funds requested (up to \$10,000)**

\$10,000

**Activity to be supported (short title, then brief description)**

Tri-Town Community Prevention and Well-Being Capacity Building and Planning

Work with multi-sector stakeholders, including town Selectboards, in the Bolton, Huntington, and Richmond communities to plan for feasibility and sustainability of an embedded prevention coalition focused on strengthening current programs, building greater capacity and expanding community efforts towards overall well-being for youth and families through creating a thriving community for all as outlined in all three Town Plans.

**Description of proposed use of funds**

Funds will be used to:

1. **Strengthen Prevention and Wellbeing** (UVM Extension)
  - **Facilitator training** for Strengthening Families Program (SFP 10-14) (an evidence based prevention program currently established at Camels Hump Middle School, but could be offered throughout the community in different venues). Pending trainer availability.
  - Advance **place-based initiatives** based on need and as identified through community engagement processes below. For example, creating a wellbeing offering space after school at Camel's Hump for youth and families.
2. **Promote Community-wide Connection and Resources** (UVM Extension and Civic Wellbeing Partners)

- Connect and convene key community partner organizations.
- Host two community-wide educational opportunities focused on communication, emotional development, trauma, and parenting.
- Complete a comparison of Jericho and Underhill resources to determine steps necessary to build alignment throughout the Unified school district and middle school areas.
- Lay groundwork for community **infrastructure** surrounding upcoming retail marijuana legalization impacts from an economic, equity and health impact on the tri-town area.

### 3. **Communication** (Civic Wellbeing Partners and UVM Extension Partner)

- Build a **network of resources** for community members, focusing on prevention and wellbeing efforts by creatively linking established mutually reinforcing programs and activities.
- Advance a wellbeing framework and asset coordination through all three **Town websites**.
- Begin implementation of a cloud based **communication tool** to promote existing local prevention resources, wellbeing activities, volunteer resources and family connection opportunities in an accessible way to all segments of the tri-town population. This tool will link to existing platforms (e.g. through social media and existing channels for promotion). This activity will take place in coordination with the larger Chittenden Prevention Network communication planning activities within the grant period.

### 4. **Planning** (Civic Wellbeing Partners Leads)

- Plan and support structure design for the tri-town prevention coalition and wellbeing initiative and ensuing coordinating position.
- Establish an ongoing budget to make visible, track, and take action to improve community wellbeing, while leveraging the interconnections of the Towns and other local assets.
- Finalize job description, hiring and supervision details related to a wellbeing coordinator position.

#### **Budget for use of funds (may include up to 10% overhead)**

Town of Richmond Overhead: \$1,000

PROSPER Salary and Benefits: \$3,700

Facilitator for Strengthening Families Program: \$4,000

Civic Wellbeing Partners Deliverables: \$6,000

Workshop Programming: \$700

Materials and supplies: \$1000  
Youth Stakeholder Stipend \$500  
Communication Tool Development \$3000

Total: \$19,900

Which levels of the Vermont Prevention Model does the activity address? (check all that apply)

- Community
- Organizations
- Relationships

**Who is meant to benefit from the proposed activity? Please give a brief description of target population (e.g., youth, young adults, families, providers, other), town(s) in which activity or service will be offered, and any defining characteristics of this population.**

These activities are meant to benefit residents in the communities of Bolton, Huntington, and Richmond with a strong emphasis on youth and families. The PROSPER team is embedded in the local schools and works closely with the target population. This project will help residents and local leaders to see the interconnections of their work through a lens of community wellbeing. We will connect community members of the three towns and bring greater awareness and access to existing resources. Activities are meant to address inequities within the larger Mount Mansfield Unified School District and build a sense of belonging within the communities. Additionally, these activities are meant to build momentum and understanding for future wellbeing programming.

**Has the activity been selected or developed through the process outlined in the Strategic Prevention Framework? (Yes/No/Not Sure) If not sure, provide brief description of how the organization decided to implement this activity.**

Yes, specifically regarding Capacity, Planning, and some Implementation pieces. We assessed local needs through a DASH Mentor Grant process and gap analysis. This process will include building capacity to address the needs identified. We have identified evidence-based practices and promising innovations, and are pursuing implementation of the selected strategies.

**If additional funding were to become available (beyond the \$10,000 limit specified in this invitation), would your organization be interested in and able to use additional funds to support prevention programs or activities within the parameters outlined here? (Yes/No/Not Sure; and a comment box)**

Yes. Additional funds could be used to hire additional expertise for grant writing and further building of capacity.

*Attachment C: Copy of Final Application*

6/24/2021

United Way PCE Funding Request Form June 2021

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# United Way PCE Funding Request Form June 2021

Please submit your request by Friday, June 18th, 2021. (If you wish to apply and can't make this deadline, contact Raquel).

...

1. Organization requesting funds

Town of Richmond

2. Contact Person Name

Josh Arneson

3. Contact Email Address

jarneson@richmondvt.gov

4. Amount Requested

\$10,000

5. Activity to be Supported (short title, then brief description - we will ask for more information if needed)

Tri-Town Community Prevention and Well-Being Capacity Building and Planning  
Work with multi-sector stakeholders, including town Selectboards, in the Bolton, Huntington, and Richmond communities to plan for feasibility and sustainability of an embedded prevention coalition focused on strengthening current programs, building greater capacity and expanding community efforts towards overall well-being for youth and families through creating a thriving community for all as outlined in all three Town Plans.

6. Description of proposed use of funds

Funds will be used to:

1. Strengthen Prevention and Wellbeing (UVM Extension)

Facilitator training for Strengthening Families Program (SFP 10-14) (an evidence based prevention program currently established at Camels Hump Middle School, but could be offered throughout the community in different venues). Pending trainer availability.

Advance place-based initiatives based on need and as identified through community engagement processes below. For example, creating a wellbeing offering space after school at Camel's Hump for youth and families.

2. Promote Community-wide Connection and Resources (UVM Extension and Civic Wellbeing Partners)

Connect and convene key community partner organizations.

Host two community-wide educational opportunities focused on communication, emotional development, trauma, and parenting.

Complete a comparison of Jericho and Underhill resources to determine steps necessary to build alignment throughout the Unified school district and middle school areas.

Lay groundwork for community infrastructure surrounding upcoming retail marijuana legalization impacts from an economic, equity and health impact on the tri-town area.

3. Communication (Civic Wellbeing Partners and UVM Extension Partner)

Build a network of resources for community members, focusing on prevention and wellbeing efforts by creatively linking established mutually reinforcing programs and activities.

Advance a wellbeing framework and asset coordination through all three Town websites.

Begin implementation of a cloud based communication tool to promote existing local prevention resources, wellbeing activities, volunteer resources and family connection opportunities in an accessible way to all segments of the tri-town population. This tool will link to existing platforms (e.g. through social media and existing channels for promotion). This activity will take place in coordination with the larger Chittenden Prevention Network communication planning activities within the grant period.

4. Planning (Civic Wellbeing Partners Leads)

Plan and support structure design for the tri-town prevention coalition and wellbeing initiative and ensuing coordinating position.

Establish an ongoing budget to make visible, track, and take action to improve community

7. Budget for Use of Funds (may include up to 10% overhead)

Town of Richmond Overhead: \$1,000  
PROSPER Salary and Benefits: \$3,700  
Facilitator for Strengthening Families Program: \$4,000  
Civic Wellbeing Partners Deliverables: \$6,000  
Workshop Programming: \$700  
Materials and supplies: \$1000  
Youth Stakeholder Stipend \$500  
Communication Tool Development \$3000  
  
Total: \$19,900

8. Which levels of the Prevention Model does the activity address? (check all that apply)

- 1. Policies and Systems
- 2. Community
- 3. Organizations
- 4. Relationships
- 5. Individual

9. Who is meant to benefit from the proposed activity? Please give a brief description of target population (e.g., youth, young adults, families, providers, other), town(s) in which activity or service will be offered, and any other defining characteristics of this population.



These activities are meant to benefit residents in the communities of Bolton, Huntington, and Richmond with a strong emphasis on youth and families. We know from living and working in these communities as well as from BRFSS and other recent data collection projects, that these towns show a high youth incidence of substance use and mental health distress with proportionally low municipal resources to support prevention efforts. As some of the most rural towns in Chittenden County, these towns have large income disparities in them that are not well reflected in town or county statistical data. This can lead to underresourced school districts or towns. The largest neighborhoods in both Bolton and Richmond are mobile home parks. These neighborhoods do not have safe routes to school or healthy food access. Whereas, the more affluent residents of Richmond are located close to the town center which is vibrant with resources and offerings. There is a high level of commitment and readiness among local businesses, community organizations and the school district to work collaboratively on solutions for better supporting all youth and families in these towns.

The PROSPER team is embedded in the local schools and works closely with the target population. This project will help residents and local leaders to see the interconnections of their work through a lens of community wellbeing. We will connect community members of the three towns and bring greater awareness and access to existing resources. Activities are meant to

10. Indicate if the proposed activity focuses on any of the following populations of youth and/or young adults (check all that apply or N/A if not applicable to this activity).

- BIPOC
- LGBTQ+
- Low income/Limited financial resources (please describe how defined)
- N/A or don't know

11. Has the activity been selected or developed through the process outlined in the Strategic Prevention Framework? (Yes/No/Not Sure) If not sure, provide brief description of how the organization decided to implement this activity.

Yes, specifically regarding Capacity, Planning, and some Implementation pieces. We assessed local needs through a Robert Wood Johnson Foundation enabled "Data Across Sectors for Health" Grant process and gap analysis. The results indicated rich opportunities and community willingness with low accessibility and communication. In addition, as a member of the Vermont Youth Project in 2019, This Tri-Town area scored high among other state peers for youth perceptions of family permissiveness in marijuana use, rates of recreational marijuana use, poor emotional health and suicidal ideation. This process will include building capacity to address the needs identified in these two data areas. We have identified evidence-based practices and promising innovations, and are pursuing implementation of the selected strategies.

## 12. Affirmations from organization requesting funds:

Please indicate agreement with each of the following statements by checking off each one.

- 1.I have reviewed the funding invitation carefully and understand the funding parameters.
- 2.The requested funds will not supplant other available funds (i.e., organization does not have other funding to support the proposed work).
- 3.The proposed activities for which the organization is requesting PCE subgrant funding will not duplicate work the organization is doing that is already funded by ADAP.
- 4.The proposed work will be completed fully (and all subgrant funds expended) by September 2021.
- 5.The organization will be able to report on progress and status of the proposed work in August 2021
- 6.The organization can accept and manage federal funds through this subgrant, will comply with any relevant restrictions for use of federal funds, and will request clarification from United Way if needed at any time. (For more information regarding federal funding through ADAP, see: <https://www.healthvermont.gov/alcohol-drugs/grants-contracts>.)
- All activities supported by these funds will follow current COVID protocols defined by the VT Department of Health.
- We will keep United Way updated on progress as well as any barriers to completing the work as proposed and/or requests for adjustments to the proposed work, timeline, or use of funds.

13. If additional funding were to become available (beyond the \$10,000 limit specified in this invitation), would your organization be interested in and able to use additional funds to support prevention programs or activities within the parameters outlined here? (Yes/No/Not Sure; and if yes, please tell us how you would use the additional funds).

Yes. We have outlined above how we would use the additional funds and requested \$19,900. We are happy to talk about modifying it back to the \$10,000 but feel there is a strong need to get this tri-town area ready for the upcoming school year to support both the schools and families as everyone emerges from the pandemic less healthy. We have the data to show that the youth in these towns were not doing well pre-pandemic, we know our school district is collaborative, yet stretched thin, we think having some capacity for prevention and wellbeing heading into the

You can print a copy of your answer after you submit

Submit

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## Attachment D: Position Description

**DRAFT**

### **Wellbeing Position Description**

#### **Community Wellbeing Coordinator**

*Proposed Position Description*

Chittenden East Communities, VT - Based in Richmond, VT

*DRAFT June 2021*

**Job Title:** Community Wellbeing Coordinator

#### **Job Summary**

Aligns, plans, and implements community programs and events and guides community engagement activities for the wellbeing of the Chittenden East Communities. Serves as liaison to schools, businesses, and community organizations. Coordinates and cultivates a network of wellbeing champions and participates in a network of peer towns, in the tri-town area (of Richmond, Bolton, and Huntington) and beyond.

#### **Major Duties**

Serves as liaison and steward for wellbeing within the organization, local and regional partner organizations, and the community to facilitate activities that address needs identified by local wellbeing data.

Develops opportunities for community engagement. Identifies areas of focus for community impact and implementation of user friendly tools to share and promote existing resources. Maintains database of relevant contacts and opportunities.

Coordinates community participation in wellbeing-related activities, programs, and special events. Coordinates events and initiatives related to prevention of drug misuse. Evaluates program delivery and needs; makes recommendations as appropriate.

Literacy in data, ability to analyze and curate relevant information for policy development and projects, manage data sharing via relevant platforms and with external stakeholders.

Prepares and presents findings, reports, presentations, and summaries. Compiles and analyzes data for studies and projects. Sources additional data as needed for contextual analysis. Identifies potential partners for data focused pilot projects.

Prepares and analyzes budget, provides monthly updates to the organization on the status of funds. Monitors expenditures for program, events, and activities.

Tracks program performance through collection of data on rates of participation, effectiveness of marketing and outreach activities, and other measurable impacts. Prepare reports regarding outcomes on a regular basis (monthly, quarterly, and/or as needed), ensure grant compliance and alignment with organizational outcomes.

Prepares content for Town website, social media, and publications describing past events, profiling local wellbeing leaders, and highlighting upcoming opportunities.

Performs other related duties, as assigned.

**MINIMUM QUALIFICATIONS**

**Knowledge, Abilities and Skills:**

**Knowledge of:**

Principles and emerging best practices relative to wellbeing initiatives and community engagement programs.

Basic principles for event planning and coordination.

Effective customer service techniques.

Modern office practices, methods, and computer equipment.

**Ability to:**

Assess the effectiveness of program activities and operations.

Coalesce various community partners and organizations to align common needs.

Organize and implement small to medium scale events and convenings in the Tri-Town Area.

Prepare and maintain basic records.

Provide effective customer service.

Establish and maintain effective and cooperative working relationships with colleagues and the public.

Use social media platforms, online content, and other tools to effectively market program activities and events for the Town.

Remain current on trends in the wellbeing space in the U.S. and globally.

**Skill in:**

Dealing with program participants in a constructive and supportive manner.

Communicating program needs effectively.

Preparing project tracking reports.

**Education, Training and Experience:** *TBD*

**Licenses and Certificates:** *TBD*

**1.0 FTE Position Annual Cost Range (Salary + Benefits): \$47,250 - \$52,650\***

- \$16.83 - \$20.00 hourly rate, or \$35,000 - \$39,000 annual salary
- \$12,250 - \$13,650 annual benefits (assuming 35% benefit rate)

*\*Assuming: Position of Community Wellbeing Coordinator & hired by Town of Richmond*



**DRAFT**  
**Wellbeing Position Description**

**SUPERVISION RECEIVED:** Works under the general supervision of \_\_\_\_\_  
and/or designee who outlines work, frequently reviews work activities and assignments and  
periodically reviews completed work.

**SUPERVISION EXERCISED:** \_\_\_\_\_.  
May assist in training of new program staff.

## Community Impact Contracts - Cohort 1-2 2020 Call for Application

### Eligibility Criteria \*

\* Indicates required

To be eligible for this contract, the applicant must satisfy all of the following requirements. Please reply to each eligibility requirement.

**1. Applicant is either a public entity or nonprofit organization that is tax-exempt.\***

*Do you meet this eligibility requirement?*

- Yes  
 No

**2. Please provide the name and email address of the lead participant in the All In online community.\***

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**3. Type of applicant organization:\***

*Select one response below.*

- Lead organization for an existing multi-organization collaboration  
 Single organization operating on behalf of community stakeholders or partners  
 Other (Specify Below)

**4. The applicant organization is a member of an existing community or regional multi-sector collaboration.\***

*Do you meet this eligibility requirement?*

- Yes  
 No

**5. The applicant organization must be based in the United States or its territories.\***

*Do you meet this eligibility requirement?*

- Yes  
 No

SAMPLE - PAGE 1 OF 24  
- not intended for submission -

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# Community Impact Contracts - Cohort 1-2 2020 Call for Application

## Key Contacts \*

### ① Instruction:

- To save your partially completed page, scroll to the bottom of this page and select "Save, continue editing" or "Save, return home."
- Use the "Copy" feature to copy completed organizational and address information to a new contact. Choose a role from the drop-down menu and select the "Copy" button.
- If the key contact Organization is a college or university, include the appropriate School, Department, or Unit.

You may use the "Select contact information" link below to facilitate the entry of data required below. If the information already exists in the GuideStar Exchange or from prior activity with RWJF, the fields below will become prepopulated with the required data. If that occurs, please be sure to proofread the prepopulated information to ensure that it is accurate and current. Feel free to edit as needed. [Use this link](#) to learn more about this feature. If, instead, you prefer to manually enter all the required information below, you may do so.

---

### Project Director \*

This is the person with the responsibility for overseeing the project. This person will be the primary recipient of all key correspondence: copy of award notice, post-award financial and monitoring, and grant closure.

\* Indicates required

**Email \***

**Confirm Email \***

**First Name \***

**Last Name \***

**Organization \***

**Position \***



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**Address \***

**Address (line 2)**

**City \***

**State / Territory \***

**Zip or Postal Code \***

**Office Phone Number \***

**Phone Extn**

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**Alternate Contact \***

The Alternate Contact should be the Project Director's assistant or another person we can contact if the Project Director is unavailable.

\* Indicates required

**Email \***

**Confirm Email \***

**First Name \***

**Last Name \***

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**Organization \***

**Position \***

**Address \***

**Address (line 2)**

**City \***

**State / Territory \***

**Zip or Postal Code \***

**Office Phone Number \***

**Phone Extn**

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**Highest Ranking Financial Official \***

This person is generally the highest ranking financial individual of the application organization (e.g., CFO, Financial Director). This person will receive correspondence related to the finances of the contract: post-award financial and financial reporting.

\* Indicates required

**Email \***

**Confirm Email \***

**First Name \***

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**Last Name \***

**Organization \***

**Position \***

**Address \***

**Address (line 2)**

**City \***

**State / Territory \***

**Zip or Postal Code \***

**Office Phone Number \***

**Phone Extn**

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**SAMPLE - PAGE 5 OF 24**  
- not intended for submission -

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# Community Impact Contracts - Cohort 1-2 2020 Call for Application

## Applicant Organization \*

### ① Instruction:

Provide the following information about the applicant organization. **Include the formal legal name of the organization that, if awarded, will receive grant funds.**

You may use the "Select organization information" link below to facilitate the entry of data required below. If the information already exists in the GuideStar Exchange or from prior activity with RWJF, the fields below will become prepopulated with the required data. If that occurs, please be sure to proofread the prepopulated information to ensure that it is accurate and current. Feel free to edit as needed. [Use this link](#) to learn more about this feature. If, instead, you prefer to manually enter all the required information below, you may do so.

\* Indicates required

Organization \*

Address \*

Address (line 2)

City \*

State / Territory \*

Zip Code + 4-digit extension \*

Phone Number \*

Phone Extension

Website

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**SAMPLE - PAGE 7 OF 24**  
- not intended for submission -

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# Community Impact Contracts - Cohort 1-2 2020 Call for Application

## Proposal Summary

### ① Instruction:

Please provide high-level, summarized information on your proposed project, suitable for communications.

\* Indicates required

### Proposal Title \*

### Amount of DASH Funds Requested \$ \*

### Proposal Summary \*

Provide a short summary of your project. This information should be a clear overview of the work you will do as part of this award and the resulting impact on community capacity. It should be able to stand on its own, as it will be published with the announcement of funded awardees.

Maximum 1,024 characters (approximately 200 words including spaces)

SAMPLE - PAGE 8 OF 24  
- not intended for submission

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# Community Impact Contracts - Cohort 1-2 2020 Call for Application

## Proposal Information Questions\*

### ① Instruction:

Please provide the information requested below, being as succinct as possible. Keep in mind that this proposal should represent a request for support of a specific activity, product or 1-2 deliverable(s) that contribute to a larger multi-sector collaborative initiative. In order to help us understand the context of this proposal, we will send the project director identified in "key contacts" a questionnaire to help describe the collaborative context as soon as this application is started. Responses will be reviewed in conjunction with the proposal detail below.

You may edit responses up until you choose "submit" on each section.

---

\* Indicates required

### Proposal Detail

Provide detail about your proposal to the questions below:

#### 1. Please describe the sector represented by the lead organization (Healthcare, Public Health, CBO, Social Services, etc).\*

- |  |   |
|--|---|
| <input type="radio"/> Public health  | <input type="radio"/> Criminal justice/corrections (e.g. prisons, jails)      |
| <input type="radio"/> Clinical health care and delivery system                             | <input type="radio"/> Legal and the court system                              |
| <input type="radio"/> Mental/behavioral health care  | <input type="radio"/> Public safety/law enforcement                           |
| <input type="radio"/> Health care payer  | <input type="radio"/> Transportation  |
| <input type="radio"/> Information management infrastructure (e.g. technology company, HIE) | <input type="radio"/> Parks and recreation                                    |
| <input type="radio"/> Social/human services  | <input type="radio"/> Banking/finance/business/industry                       |
| <input type="radio"/> Food and nutrition   | <input type="radio"/> Philanthropy  |
| <input type="radio"/> Housing/homelessness   | <input type="radio"/> Planning, economic or community development             |
| <input type="radio"/> Faith-based  | <input type="radio"/> Other local/state/tribal government not mentioned above |
| <input type="radio"/> Education/schools  | <input type="radio"/> Other community-based/nonprofit not mentioned above     |
| <input type="radio"/> Academia/research  |   |
| <input type="radio"/> Other (specify below)  |   |
- 
- 

SAMPLE - PAGE 9 OF 24  
- not intended for submission



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**2. Please name at least two other sectors which will engage in the project (Healthcare, Public Health, CBO, Social Services, etc).\***

- |   |  |
|---|--|
| <input type="checkbox"/> Public health  | <input type="checkbox"/> Criminal justice/corrections (e.g. prisons, jails)      |
| <input type="checkbox"/> Clinical health care and delivery system                             | <input type="checkbox"/> Legal and the court system                              |
| <input type="checkbox"/> Mental/behavioral health care  | <input type="checkbox"/> Public safety/law enforcement                           |
| <input type="checkbox"/> Health care payer  | <input type="checkbox"/> Transportation  |
| <input type="checkbox"/> Information management infrastructure (e.g. technology company, HIE) | <input type="checkbox"/> Parks and recreation                                    |
| <input type="checkbox"/> Social/human services  | <input type="checkbox"/> Banking/finance/business/industry                       |
| <input type="checkbox"/> Food and nutrition   | <input type="checkbox"/> Philanthropy  |
| <input type="checkbox"/> Housing/homelessness   | <input type="checkbox"/> Planning, economic or community development             |
| <input type="checkbox"/> Faith-based  | <input type="checkbox"/> Other local/state/tribal government not mentioned above |
| <input type="checkbox"/> Education/schools  | <input type="checkbox"/> Other community-based/nonprofit not mentioned above     |
| <input type="checkbox"/> Academia/research  |  |
| <input type="checkbox"/> Other (specify below)  |  |

---

**3. What cohort are you applying for? Choose one.**

- Pursuing equity (especially racial health equity) in multi-sector data system development intended to improve community health, well-being and equity.
- Increasing sustainable capacity of community-based social service organizations to lead and leverage collaboration and data system development intended to improve community health, well-being and equity.

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**4. Succinctly summarize the opportunity you want to leverage or problem you propose to solve. Describe the specific strategies/activities you plan to implement and the resulting increase in capacity.\***

Include the following elements in your response.

- Propose 1-2 measurable accomplishments, products, or deliverables that will result from this award. Describe how they benefit the collaboration partners and community members.
- Describe the present or proposed data system that the deliverables support, including information about the specific use case(s) supported by project success.
- Describe any barriers that you anticipate and how they will be addressed.
- Describe the specific strategies you hope to work on as part of your chosen cohort (refer to cohort descriptions for examples).
- Describe the work plan (uploaded separately; see “support documents”). You may also attach work plans for a larger project if this request addresses a challenge in that larger context and it helps clarify the activities that you describe below.

Maximum 6,000 characters (approximately 1,000 words including spaces)



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**5. Name and describe the primary partners from different sectors and their role/ involvement in the specific project/activities outlined in this proposal and work plan (up to four organizations/stakeholder types).\***

Consider:

- How each stakeholder listed will contribute to and benefit from this proposal, including consideration of community members/persons with lived experience of inequity.
- What types of data will be shared between these partners, and how?
- Where (which sectors/stakeholders) will capacity be developed to share or use multi-sector data?

Maximum 3,000 characters (approximately 500 words including spaces)

**6. Please describe the proposed impact of this project.\***

Consider:

- How the activities or deliverables will advance the overall purpose and goals of your multi-sector collaboration (as described in the questionnaire).
- Possible next steps after reaching your 1-2 deliverable(s): (Be as specific as possible about how this project, if successful, will enable the next steps of your data sharing plans and/or collaborative work to improve community health).
- How will you fund these next steps? (In other words we are interested in the sustainability of the data sharing initiative to which this project contributes.)
- How the deliverables will make a lasting impact on capacity to share data and collaborate across sectors to improve health and equity in your community. (Be sure to address impact on all partners, and especially on community-based/non-health care partners.)
- Include a discussion of any current funds that exist to help leverage this work or other funding this award might encourage.

Maximum 3,000 characters (approximately 500 words including spaces)

**7. Describe the specific community and population involved in or addressed with this proposal.\***

Consider:

- How members of that community have been engaged in leadership or other roles in your work to date.
- How you intend to engage with the community as related to this proposal.

Maximum 1750 characters (approximately 340 words including spaces)

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**8. Describe how your approach, documentation, materials, results or evaluation (in whole or in part) might be useful to other collaborations or communities engaged in similar or related activities.\***

Maximum 1750 characters (approximately 340 words including spaces)

**SAMPLE - PAGE 12 OF 24**  
- not intended for submission -

# Community Impact Contracts - Cohort 1-2 2020 Call for Application

## Budget Worksheet \*

\* Indicates required

### ① Instruction:

An important component of your proposal is the preparation of a budget. Complete every field on this page using your best judgment when projecting expenses. DASH adheres to RWJF's financial policy.

- Personnel—salary and fringe costs.
  - Amount - enter the amount requested.
  - FTE (if shown) - this column does not calculate.
  - Total - this column will replicate the "Amount" column for a single budget period.
  
- Other Direct Costs—office operations, communications/marketing, travel, meeting expenses and project space.
- Consultants/Contractors—consultant and/or contract costs.
- Indirect Costs—administrative expenses related to overall operations. The Foundation's approved rate for Indirect Costs is 12% of Personnel, Other Direct Costs and Consultants/Contractors for U.S. colleges/universities and hospital or health systems, and 20% for Nonprofit Organizations. When Consultants/Contractors total more than 33 percent of the RWJF portion of a budget, the Foundation limits indirect costs on the Consultants/Contractors category to 5%.

Travel and other direct expenses associated with participation in the learning collaboration will be covered by DASH.

Enter budget information in the section below.

## Budget Worksheet

		Period 1	
		Duration * 6	
		months	
<b>Personnel</b>			<b>Total</b>
Proj. Dir./Prin. Invest.			
Program Staff			
Administrative Staff			
Other Staff			
Fringe Benefits	%		
<b>Personnel Total</b>			
<b>Other Direct Costs</b>			<b>Total</b>

Office Operations		
Communications/Marketing		
Travel		
Meeting Expenses		
Polls and Surveys		
Equipment		
Project Space		
Other		
<b>Other Direct Costs Total</b>		
Consultants/Contractors		Total
Consultants		
Contracts		
<b>Consultants/Contractors Total</b>		
Indirect Costs		Total
<b>Indirect Costs Total</b>		
Total		

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 - not intended for submission -

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## Community Impact Contracts - Cohort 1-2 2020 Call for Application

### Budget Narrative\*

\* Indicates required

**1. Please describe the use of funds for this contract, making sure to relate it to the work plan and deliverables. For contracts with an individual consultant, a vendor, or another organization, please describe their relevant experience (you agree to provide a copy of the executed contract to the Program Office). You may upload additional documentation about them in the Supporting Documents section.\***

*Maximum 3000 characters (approximately 500 words including spaces)*

**2. Please describe any budgeted travel or meeting expenses.\***

*Maximum 2000 characters (approximately 380 words including spaces)*

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- not intended for submission -

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# Community Impact Contracts - Cohort 1-2 2020 Call for Application

## Supporting Documents \*

### ① Instruction:

The following supporting documents are either required or optional, as indicated:

1. CV-Resume of primary contact (*required*)
2. Letters of Support (*optional* but strongly encouraged if the success of your project depends on participation of other partners. Applications that do not present convincing evidence of multi-sector collaboration are generally not funded.)
3. Last two years' audited financial statements (*required*)
4. Project Timeline/Work plan (template provided) (*required*)
5. Optional Appendices (e.g., collaborative or data governance structures, information about other projects to be leveraged) (*optional*)

**To Begin:** Download the template shown below. Follow the instructions included on the template.

**To Upload:** Upload the completed template by selecting the "Upload" button below. For assistance with uploading, refer to the "Upload Documents" section of the "Applicant Guide," (see "Resources" box on the left).

When you have completed this page, select the "Save, section finished" button at the bottom of the page. Once all sections of your application are complete, you may "Submit" from the Home Page. All uploaded documents may be updated and replaced until you submit your application.

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\* Indicates required

Description	Templates	Uploaded Documents
<p><b>CV-Resume Instructions *</b></p> <p>Use this template for the Project Director and Co-Project Director. You may upload up to 2 (two) CVs with a maximum of 4 (four) pages per document uploaded.</p> <p>See the instructions link in the "Templates" column to the right.</p> <p>To maintain the original formatting, <b>you must convert your document to a PDF prior to uploading</b>. For additional information, refer to "Troubleshooting Tips," (see "Resources" box on the left).</p>	<p><a href="#">CV Resume Instructions</a></p>	

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### Letters of Support

[Letter of Support Instructions](#)

Letters of Support are optional but strongly encouraged if the success of your project depends on participation of other partners. Applications that do not present convincing evidence of multi-sector collaboration are generally not funded.

See the instructions link in the "Templates" column to the right.

To maintain the original formatting, **you must convert your document to a PDF prior to uploading**. For additional information, refer to "Troubleshooting Tips," (see "Resources" box on the left).

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### Financial Statements \*

Please provide the last two years' audited financial statements. **Excel files or portfolio files are not accepted.**

To maintain the original formatting, **you must convert your document to a PDF prior to uploading**. For additional information, refer to "Troubleshooting Tips," (see "Resources" box on the left).

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### Project Timeline/Work Plan \*

[Timeline/Work Plan](#)

Download the template in the "Templates" column to the right, and follow the instructions carefully.

To maintain the original formatting, **you must convert your document to a PDF prior to uploading**. For additional information, refer to "Troubleshooting Tips," (see "Resources" box on the left).

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### Optional Appendices

[Appendices Template](#)

Optional documents include an expanded list of key supporters and details on consultants, vendors, and organizations if they have already been identified.

If you choose to submit appendices, download the template (see link in "Templates" column to the right) and follow the instructions carefully.

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To maintain the original formatting, **you must convert your document to a PDF prior to uploading**. For additional information, refer to "Troubleshooting Tips," (see "Resources" box on the left).

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**CIC-Cohort 1-2  
CV-Resume Instructions**

CVs should include information on education, professional experience, publications and funded or unfunded research.

Although no specific format is required, each CV should be no more than 4 pages.

You may upload a separate CV for the Project Director and Project Co-Director.

**For a hard copy CV**, you should scan each one individually and save to your computer as a PDF file. Upload the completed document by selecting the "Upload" button. For assistance with uploading, refer to the "Upload Documents" section of the "Applicant Guide," (see "Resources" box on the left of the online system).

**For an electronic CV**, you should save each one individually to your computer as a PDF file. Upload the completed document by selecting the "Upload" button. For assistance with uploading, refer to the "Upload Documents" section of the "Applicant Guide," (see "Resources" box on the left of the online system).

**NOTES:**

- **Save your CV as a PDF.** In the "Resources" box on the left of the online system, you will find the "Applicant Guide." Within the guide, there are links to "Upload Documents" and "Troubleshooting Tips" for converting your document to a PDF.
- **The maximum page-limit per CV is 4.**
- To upload more than one CV, select "Upload document" after you have uploaded your first CV in the Uploaded Documents column.

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**CIC-Cohort 1-2  
Letters of Support Instructions**

Upload a letter(s) of support on institution letterhead from the most active members of the collaboration or community stakeholders.

The letter of support should address specific plans for participating in the project and their role within the collaboration.

**For hard copy letters**, you should scan each one individually and save to your computer as a PDF. Upload the completed document by selecting the "Upload" button. For assistance with uploading, refer to the "Upload Documents" section of the "Applicant Guide," (see "Resources" box on the left of the online system).

**For electronic letters**, you should save each one individually to your computer as a PDF. Upload the completed document by selecting the "Upload" button. For assistance with uploading, refer to the "Upload Documents" section of the "Applicant Guide," (see "Resources" box on the left of the online system).

**NOTES:**

- **Save your Letter(s) of Support as a PDF.** In the "Resources" box on the left of the online system, you will find the "Applicant Guide." Within the guide, there are links to "Upload Documents" and "Troubleshooting Tips" for converting your document to a PDF.
- To upload, select "Upload document" in the Uploaded Documents column.
- You may upload each letter individually. After each upload, another "Upload document" button will appear. A "Remove" button will also appear, in case you need to delete an uploaded document.

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**CIC-Cohort 1-2  
Project Timeline/Work Plan Template**

**Instructions for using this template.**

**This template is to be used to provide your project timeline.**

**You should:**

- Print this template in its entirety before you begin, so you have the instructions available at all times.
- Complete the identifying information shown below this block of instructions.
- Complete the **timeline chart** shown below.
  - Include the 1-2 primary deliverables described in your project proposal.
  - Include the months that will be required to complete your project.
  - In the first column, list the deliverables of this project, followed by the activities, tasks or milestones that will be necessary to meet each objective.
  - The following 6 columns should represent each month of the plan's timeline. Complete the grid by placing an X in the appropriate box for when each deliverable and activity, task or milestone will occur.
  - Grantees will be required to report progress according to these timelines.
- Delete this block of instructions.
- **Save your final project timeline as a PDF.** In the "Resources" box on the left of the online system, you will find the "Applicant Guide." Within the guide, there are links to "Upload Documents" and "Troubleshooting Tips" for converting your document to a PDF.
- Upload the PDF to the Supporting Documents section of the online system.

**NOTES:**

- Do not adjust the margins or font style/size of this template.
- No hardcopy materials will be accepted as part of your online submission.

**Remember to delete this block of instructions before uploading this template.**

**Identifying Information**

**Project Title:** (your project title goes here)

**Application I.D.:** (your application ID goes here—found in the upper right corner of any screen in this online system)

**Applicant Name:** (your project director's name goes here)

**Legal Name of Applicant Organization:** (legal name of applicant organization goes here)

**Timeline Chart(s)**

Six Month Timeline (by month)	M	J	J	A	S	O
<b>Deliverable 1:</b>						
Activity/task:						
Activity/task:						
Activity/task:						

<b>Deliverable 2:</b>							
Activity/task:							
Activity/task:							
Activity/task:							

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 - not intended for submission -

**CIC-Cohort 1-2  
Optional Appendices Instructions**

This template may be used to provide additional information in support of your project. You will need to follow the instructions below only if you choose to submit appendices. If appendices are *not* applicable, you do not need to upload this template.

**Appendices are optional** and should be combined and uploaded as one comprehensive document. The first/cover page of the "Appendices Template" should list the materials that are being submitted.

**You should:**

- Print this template in its entirety before you begin, so you have the instructions available at all times.
- Complete the identifying information shown below this block of instructions.
- Complete the **Appendices** section below. You may include any documents directly related to the proposed project. Examples of materials you may submit in this appendices template include:
  - o bibliography or references for the proposal narrative
  - o description(s) of the organizations, vendors, and consultants with whom you will work or other documents demonstrating access to necessary data sources
  - o evidence of prior work
- Delete this block of instructions before uploading your appendices.
- **Save your final Appendices Template as a PDF.** In the "Resources" box on the left of the online system, you will find the "Applicant Guide." Within the guide, there are links to "Upload Documents" and "Troubleshooting Tips" for converting your document to a PDF.
- Upload the PDF to the "Supporting Documents" section of the online system.

**NOTES:**

- No hardcopy materials will be accepted as part of your online submission.

**Remember to delete this block of instructions before uploading this template.**

**Identifying Information**

**Project Title:** (your project title goes here)

**Proposal I.D.:** (your proposal ID goes here—found in the upper right corner of any screen in this online system)

**Applicant Name:** (your Projector Director's name goes here)

**Legal Name of Applicant Organization:** (Legal Name of Applicant Organization goes here)

**Appendices** (list below the materials that you are submitting as appendices)

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