Strategies for Sustaining and Expanding Your Title VI Elders Program
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Our gratitude to Susan White!

The substantive presentation and materials are developed by Susan White. Susan White is the Senior Partner for ACKCO, Inc. a private Indian professional services firm. She has over 30 years of experience in the field of financial management. Ms. White has worked with over 500 Tribes and Native organizations and 1,000 non-profits in the areas of comprehensive planning, resource development, organizational development, financial management, staff development, administrative operating policies and procedures and economic development.
Overview

This workshop will focus on the five primary strategies for expanding revenues and resources for your Elders Program.
Overview

The five strategies include:

- Planning for sustainability
- Diversifying your funding and leveraging resources
- Recruitment and management of volunteer programs
- Securing resources through partnerships
- Social entrepreneurship

The workshop will also provide a Sustainability Toolkit which will assist you in incorporating the strategies into your overall program planning and operations.
ICEBREAKER
Introductions

- Introductions:
  - Name,
  - Tribe,
  - Position,
  - What are you hoping to share and/or learn in this session?

This session is designed to be interactive, so please share your questions, examples, and suggestions!
SUSTAINABILITY TOOLKIT
Areas Addressed in Toolkit

- Sustainability of Projects
- Planning for Sustainability
- Leveraged Resources
- Volunteers
- Partnerships
- Social Entrepreneurship
Section 1: Sustainability of Projects

What Is Sustainability

- The ability of a system of any kind to endure and be healthy over the long-term
- The ability of an organization to develop a strategy of growth and development that continues to function indefinitely
Section 1: Sustainability of Projects

- Characteristics of Sustainable Projects
  - Focus on Achieving and Maintaining Long Range Goals Set by the Community
  - Movement of the Project Focus from Treating Symptoms to Long-Term Positive Change
  - Sustainability is a Result of the Project’s Design
In our every deliberation, we must consider the impact of our decisions on the next seven generations.

- **Iroquois** Maxim (circa 1700-1800)
Section 2: Planning for Sustainability

- Planning Processes that Build Sustainability
  - Community-Based Planning
  - Asset Mapping
  - Building of Partnerships
  - Attracting Leveraged Resources
  - Identifying Project Elements to be Sustained
Section 2: Planning for Sustainability

- Project Design Elements for Sustainable Programs
  - Long Range Goals
  - Condition to be Addressed
  - Project Goal
  - Project Approach
  - Identifying Project Elements to be Sustained
  - Project Outcomes
  - Project Outputs
  - Project Impacts
  - Monitoring and Evaluation
Diversifying Revenues

- Social Media
- Social Entrepreneurship
- Individual Giving
- Major Donor Groups
- Identifying Project Elements to be Sustained
- Events
- Direct Mail
- Corporate Giving
- United Way
- Grants: Public and Private Foundations, Corporate, and Government
Section 2: Planning for Sustainability

- Sustainability Strategic Plan
  - Executive Summary
  - Mission and Vision
  - Core Values
  - History of Organization, Department, or Project
  - SWOT Analysis
  - Goal
  - Long and Short Term Objectives
  - Strategy
  - Work Plan
Section 2: Planning for Sustainability

- **Resources**
  - Guidebook for Designing Sustainable Programs
  - Example of a Sustainability Strategic Plan

- **Tools**
  - Identifying Community & Organizational Goals
  - Defining the Current Condition
  - Writing a Goal Statement
  - Selecting an Approach
  - Developing the Objectives and Activities
  - Template for Writing a Sustainability Strategic Plan
He who would do great things should not attempt them all alone.
- Seneca proverb
Section 3: Leveraged Resources

What is a Leveraged Resource?

• The definition of a leveraged resource is the ability to influence a system, or an environment, in a way that multiplies the outcome of one’s efforts.

aka: DOING MORE WITH LESS
Section 3: Leveraged Resources

How Do You Leverage Resources
- Be Creative, Find Alternative Ways of Doing Things
- Take Advantage of Opportunities
- Develop Strategic Alliances
- Build Local, Regional, and National Support
Section 3: Leveraged Resources

- Develop a Strong Network of:
  - Individuals
  - Organizations
  - Units of Government
  - Businesses
- Work Together Towards a Common Goal
Section 3: Leveraged Resources

- Five Steps to Building an Effective Impact Network
  1. Clarify Purpose
  2. Convene the Right People
  3. Cultivate Trust
  4. Coordinate Actions
  5. Collaborate Generously
Some Definitions

- **Coordination** – open discussion, active listening, sharing data and information

- **Collaboration** – Memorandum of Understanding; having a voice in how/when/where services are provided; joint funding commitment

- **Cooperation** – implement the coordinated service project; provide follow-up; agree on continuation plan

- **Partnership** – A written agreement entered into by two or more persons in which each agrees to furnish something

State Units on Aging & Area Agencies on Aging as leveraged resources – It’s in the law!

• Sec 614(a)(11) – A Tribal Organization receiving Title VI funding must assure it will coordinate Title VI services with services provided under Title III in the same geographical area

• Sec 306(a)(11)(B) – Each Area Agency Plan shall provide information concerning services to older Indians and assure the Area Agency will coordinate services with those provided under Title VI

• Sec 307(a)(21)(A) – The State Plan shall assure that the State Agency will coordinate programs under Title III with programs under Title VI
Section 3: Leveraged Resources

- Primary Methods of Leveraging Resources
  - Volunteers
  - Strategic Partners
  - Social Entrepreneurship
Section 3: Leveraged Resources

- **Community Asset Maps**
  - Provides a Framework for Identifying the Location of Resources
  - Highlights Resources of Importance
  - Analyzes the Status or Condition of a Location or Resource
  - Raises Awareness of Existing Facilities or Natural Resources
  - Identifies Which Resources Are Important to the Project
  - Creates a Visual Representation That Can Be Understood By All
Section 3: Leveraged Resources

- **Resources**
  - Example of a Community Asset Map
  - Procedure for Tracking Leveraged Resources

- **Tools**
  - Community Asset Map Template
  - Forms for Tracking Leveraged Resources
Why is it important to seek other than Title VI Resources

- $46 million to serve over 270 Tribes & Tribal Organization is about $170,000 per grantee to provide Meals, Transportation, Information & Assistance, Caregiver Support, etc. . . . And administer the program
  - In other words, needs of elders and caregivers are likely to far exceed funding available through Title VI!
Volunteers are a Key Component to Achieving Sustainability Goals

- Volunteers Save Money and are Effective at Leveraging Resources
- Volunteers are Conduits to the Community
- Volunteers Can Lighten Staff Workloads
- Some Work is Best Performed by Volunteers
Section 4: Volunteers

Eight Basic Functions in Developing a Volunteer Program
1. Community Assessment
2. Strategic Planning
3. Recruitment of Potential Volunteers
4. Interviewing, Screening, and Selecting Volunteers
5. Orienting and Training Volunteers
6. Ongoing Supervision and Management of Volunteers
7. Recognition and Volunteer Development
8. Measuring Outcomes and Evaluating the Process
Section 4: Volunteers

- **Benefits to the Organization/Project**
  - Expanded Service Delivery
  - Achievement of Intended Community Impact
  - Improved Capacity
  - Improved Volunteer Experience
  - Increased Value of Volunteers
  - Addresses Gaps in Services
Section 4: Volunteers

- **Resources**
  - Designing and Managing a Volunteer Program Guidebook
  - Sample Volunteer Handbook

- **Tools**
  - Identifying Need for Volunteers
  - Assessing the Readiness of Project/Organization for Managing Volunteers
  - Template for Planning and Executing Volunteer Recruitment
  - Designing the Volunteer Job Description Template
  - Designing the Volunteer Training Plan Template
  - Volunteer Evaluation Template
Once I was in Victoria, and I saw a very large house. They told me it was a bank and that the white men place their money there to be taken care of, and that by and by they got it back with interest.

We are Indians and we have no such bank, but when we have plenty of money or blankets, we give them away to other chiefs and people, and by and by they return them with interest, and our hearts feel good.

Our way of giving is our bank.

- Chief Maquinna, Mowachaht (died circa 1795)
A Partnership is a Collaborative Relationship Between Entities to Work Toward Shared Objectives Through a Mutually Agreed Division of Labor
Section 5: Partnerships

Benefits of Partnerships

- Save Costs by Sharing of Expenses
- Strengthens Projects/Programs
- Increases Capacity of Both Partners
- Improved Efficiency
- Effective Use of Resources of Each Partner
Section 5: Partnerships

Steps to Establishing a Partnership

- Defining the Need for a Partnership
- Identifying Potential Partner
- Meeting With a Potential Partner to Determine if There is a Common Goal
- Establishing the Partnership
Section 5: Partnerships

- Managing Partnerships
  - Communication
  - Resource Management
  - Decision-Making
  - Conflict Resolution
Some Ideas on Tribal Partnerships

• Share ideas between tribes
• Collect information for planning purposes
• Talk about services available and help elders sign up
• Give feedback to non-Indian contractors that serve elders
• Develop and share evidence-based programs
• Communicate information about clinic programs, school and preschool programs, and elders programs that need support in order to make connections in town
• Training
• Establish relationships with local communities
Results of Successful Tribal Partnerships

• Relationships with local tribal communities
  – Travel together
  – Attend cultural and business events together
  – Billing agreements for Medicaid Services
  – Collaboration on grants
    • Mutual Letters of Support
    • Incorporation of efforts

• Thousands of Dollars of tribal-specific grants
  – Chronic Disease Self Management
  – Elder Abuse prevention
  – Nursing Home diversion
  – Oral Health

• Thousands of Indian Elders served successfully
A Menu of Possibilities for Partnerships

- Benefits Counselors
- Elder’s Dinners
- Caregiver Recognition
- Caregiver Training
- Kinship Care Conferences
- Diabetes Education
- Title VI Director Training
- Adult Foster Home business plan
- Planning and service development
- Assistance with Medicare and Medicaid Access
- Medication Management Training
- Foot Care
- Homecare Agency development
- Transportation Services
- Home Care Worker Recruitment
- Health Care Career Path mentoring
- Elder Abuse Councils
Section 5: Partnerships

- **Resources**
  - Partnerships: Frameworks for Working Together Guidebook

- **Tools**
  - Tool for Identifying Partners
  - Template for a Partnership Agreement
Humankind has not woven the web of life. We are but one thread within it. Whatever we do to the web, we do to ourselves. All things are bound together. All things connect.

– Chief Seattle,
Duwamish
Section 6: Social Entrepreneurship

Social Entrepreneurship is the Use of the Techniques that Start Up Companies and Other Entrepreneurs Use to Develop, Fund, and Implement Solutions to Social, Cultural, or Environmental Issues
Section 6: Social Entrepreneurship

- Why Social Entrepreneurship
  - Survival
  - Self-Sufficiency
  - Flexibility
Section 6: Social Entrepreneurship

- Steps to Determining if Social Entrepreneurship is Right for Your Organization or Program

  - Assess the Organization/Project Strengths and Weaknesses
  - Determine if a For Profit Component Will Tie Into the Overall Goals
  - Can the Organization/Project Afford the Risk
Section 6: Social Entrepreneurship

- The Business Plan
  - Statement of Purpose of Plan
  - Description of Business
  - Market Analysis
  - Organization and Management
  - Financial Analysis
Section 6: Social Entrepreneurship

- **Resources**
  - Guide Three of the Indian Social Entrepreneur’s Guide

- **Tools**
  - Business Readiness Assessment
  - Marketing Plan Template
  - Business Plan Information Checklist
  - Tool to Determine Production Factors
  - Tool to Determine Capitalization Requirements
  - Balance Sheet Template
  - Monthly Statement of Operations Template
  - Statement of Operations Template
  - Statement of Cash Flow Template
Other Considerations: Diversifying Funding Beyond Title VI

– Apply for Title III funding from AAA or SUA (contact your Title VI project officer for more info)
– Become a Medicaid provider (CMS ITU Outreach & Education event at this conference)
– Find and apply for funding from other sources (come to our session on Friday morning at 8:30 am!)
  • Federal, state, local governments
  • Not-for-profit foundations
  • For-profit businesses
  • Other?
HOW TO EFFECTIVELY APPLY AND PLAN FOR OTHER FUNDING
FINDING OTHER FUNDING SOURCES
How to learn about other funding sources

• Title VI weekly newsletter
• State, AAA, county, and other local distribution lists
• National, state, and local foundations & community organizations
• Talk with your peers
DEVELOPING PROJECTS FOR OTHER FUNDING SOURCES
What projects to consider?

• What can you learn by using some of the tools in this Intensive?
• What do elders, caregivers, family members, community members, and tribal council members ask you about?
• What would you like to do, if only you had the money, staff member, equipment, time, etc. to better serve your elders and caregivers?
• Have you heard some great ideas at this conference or elsewhere that you would like to bring to your community?
Timing is important!

• Consider keeping a folder of potential grant ideas to jot down as you think of them
• Plan ahead – think about your priorities and what to focus on
Things to consider when seeking other funding

- Define what you would do with other funding
  - Is it that you need a new refrigerator to provide more meals?
    - Or do you need a new refrigerator, plus additional staffing to prepare and serve/deliver the meals?
  - Is it that elders need help with snow removal and other heavy chores?
    - Or do elders need help with these tasks, as well as with activities of daily living, such as bathing, getting dressed, and preparing meals.
Things to consider when seeking other funding

- Consider timeframes
  - Be aware of due dates – when do funders issue their opportunities to apply for funding?
    - Is it every 3 years like with the Title VI applications?
    - Is it semi-annually, like every March & October?
    - Is there a distribution list that you can ask to be placed on to learn about when new funding cycles open?
  - Think about what you will need to do before due dates (e.g., get Tribal Council approval, work with other Tribal offices such as grants/budget, write the application)
Things to consider when seeking other funding

• Picking the right opportunities for which to apply
  – Make sure you are a good fit for the grant to which you are applying
  • Example: You have 2 great vans. But you need additional funding to hire staff to drive the vans in order to take elders shopping, to doctor appointments, etc. You see a foundation want to address transportation needs by offering to donate vehicles – should you apply?
Things to consider when seeking other funding

• Picking the right opportunities for which to apply
  – Answer: Contact the foundation & ask if they would consider an application to fund drivers. If they say yes, you can proceed with confidence. If they say no, ask if they know of any other opportunities or funders that do. They might give you some good connections, and at the least they will save you from wasting time on an application that wouldn’t be funded!
Things to consider when seeking other funding

• Picking the right opportunities for which to apply
  – Are the requirements more than the benefits?
  • For example, would you have to meet excessive reporting requirements or complete the work in a timeframe that doesn’t work for you? Would you have to purchase expensive software or equipment that would end up costing more than the grant is worth?
Things to consider when seeking other funding

• Paying careful attention to directions in applications
  – Make sure you read the instructions on applications, and then follow them. Common mistakes include:
    • Not providing all the info requested
    • Not following word or page limits
    • Not using the requested order or format for the application
Things to consider when seeking other funding

• Paying careful attention to directions in applications
  – Make sure you read the instructions on applications, and then follow them. Common mistakes include:
    • Meeting DUE DATES – many, if not almost all, will not consider applications that do not exactly meet the due dates, even with good excuses, such as weather, power going out, software problems, etc.
      – So if you cannot meet the due date, better to focus on another funding opportunity.
Things to consider

• Have someone else read the application and see if it is clear to them what you are proposing to do. This might be a great job for an advisory council, a colleague from a different department, a volunteer, etc.
This may be a lot of work, but it is worth it!

- Provides expanded program services to meet the needs of Tribal Elders
- Improves quality of life for Tribal Elders
- Increases your knowledge about other resources
- Reduces inefficiency of services
- Develops partnerships to address unmet needs

Contributes to overall wellness & sustainability of your community!
For more information or to discuss:

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Thank you for the opportunity to work with and learn from you, with the goal of serving elders and caregivers!