PHILANTHROPIC TOOLS
for SELF-DETERMINED COMMUNITIES
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Most small towns in the rural service area of the Community Foundation of Greater Dubuque face serious, chronic challenges: empty buildings on Main Street, declining school enrollment, too few housing options and recreation opportunities, and a deficiency of technical/professional entry-level jobs. Despite these common struggles, there are champions in every community committed to building bright futures with the right tools.

In June 2014, the United States Department of Agriculture (USDA) awarded a two-year, $150,000 Rural Community Development Initiative (RCDI) grant to the Community Foundation for a project aimed at building greater prosperity and sustainability in five rural communities: Harpers Ferry, Edgewood, Monticello, and Jackson County in Iowa and Jo Daviess County in Illinois. The grant funded work to build the capacity of local nonprofits to inspire and equip community members to work together on a wide range of issues: from grade-level reading help for third graders to health and wellness planning for retirees. Staff from CFGD offered training and technical assistance to nonprofits, empowering them to take charge of their communities’ futures while inspiring others to do the same.

In addition, the project would build a portfolio of philanthropic tools for other rural communities to use on their pathways to greater development success.

There were three project goals:

1. Engaged Communities
2. Endowment Building
3. Strategic Development Initiatives – a model for community development philanthropy where priorities are matched with expanding resources, including non-endowed project funds

These three goals were pursued by local champions and supported by Community Foundation-led training and technical assistance to weave a stronger social fabric in these five self-determined communities.

"Great things are done by a series of small things brought together."

–VINCENT VAN GOGH
JO DAVIESS COUNTY, IL

When you stand at the top of Horseshoe Mound Preserve, just outside of Galena in Jo Daviess County, you immediately understand why conservation is so important to this county in northeast Illinois.

Hugging the Mississippi River on its western border, Jo Daviess is a true rural masterpiece of the Driftless Region. Soaring eagles and the songs of eastern bluebirds add to the pastoral wonder of this community, while the smiling faces on the sidewalks of Elizabeth, Illinois, and the friendly waves from pickup truck drivers cruising the hills surprise you at every turn.
On May 12, 2016, 100 community members filled the doors of the Galena Brewing Company for the unveiling of Major Daviess Summer Ale.

While this might sound like an ordinary story from a small town brewery, the introduction of the orange-zest infused Hefeweizen was actually a unique collaboration between a nonprofit and a for-profit business, and an important step forward for the community. The event was the brainchild of the Jo Daviess Conservation Foundation (JDCF).

“This beer brings new people to the table and we hope this will help us connect to the millennial generation that we have a hard time connecting with,” says Christie Trifone-Simon, JDCF director of development. “It’s just a really creative way to not only fundraise but to get them excited about the work that we’re doing.”

Honoring Jo Daviess County namesake General Joseph Hamilton Daviess, this beer’s ingredients and production were donated by the Galena Brewing Company in Galena, Illinois. The proceeds from the sale of the beer will provide operating support for JDCF.

“Great taste for a great cause,” says Trifone-Simon. “We selected the name because we service all of Jo Daviess County, and he’s a historical figure, so it really complemented a lot of the local and tourist interests.”

This type of inventive community collaboration has become the new normal for the Jo Daviess Conservation Foundation since starting Philanthropic Tools in 2014.

“We live in a very rural community so resources are limited and we have many other nonprofits that need support too,” says Trifone-Simon. “So to have such a limited base to work from, it’s really important that we work together and I think that’s really the motivation behind the grant: to help us all work together to make our community stronger.”

Community members gathered on May 12, 2016, to celebrate the unveiling of Major Daviess Summer Ale. Proceeds from this unique collaboration between a nonprofit and a for-profit business will benefit local conservation efforts.
LAYING THE GROUNDWORK

How did a rural conservation land trust begin thinking about crafting its own beer? It all started with strategic planning and the outcomes were far greater than just a custom brew.

Shortly after receiving funding support from the USDA Rural Community Development Initiative Philanthropic Tools grant, JDCF started working on a strategic plan that would guide the organization into the future.

“It’s critical to have strong leadership guiding the way towards a long-term vision,” say Trifone-Simon. “What helped to clarify our process and create movement was the support provided by the Community Foundation of Greater Dubuque. It was an objective third party that facilitated a clear process and assisted with tools and resources that made the difference. I think that’s one of the many values the Foundation brought to the table.”

Facilitated by Kari McCann, former director of nonprofit partnerships and grantmaking at the Community Foundation of Greater Dubuque, the strategic planning process was based on Peter Drucker’s *The Five Most Important Questions You Will Ever Ask About Your Organization*. McCann observed, “The mission to preserve land here in Jo Daviess County is exciting to be part of.”

“Kari brought great credibility to the process,” says Steve Barg, JDCF executive director. “She was a valued member of the team. We didn’t just view her as an outside facilitator, but as a colleague.”

The five questions were simple yet thought-provoking and led to clear understanding of the organization’s role and purpose in Jo Daviess County. According to McCann, the process was successful because the JDCF:

- had a clear vision;
- was deeply engaged;
- had a dedicated strategic planning committee; and
- was thoughtful in its approach.

“JDCF had a nice blend of folks who really understood the conservation side of the game and people that really understood strategic goal setting and strategic planning,” says McCann. “So when you married those two together, you really had a powerful team.”

WHAT HAPPENED?

- Learned how to listen to members and supporters and shifted its approach to reach them
- Grew endowment by more than $70,000
- Hired new development staff
- Established a planned giving program and made connections with three future legacy donors to set the stage for growth of the JDCF endowment fund
- Shared knowledge and experience with local nonprofits, civic organizations, and city governments
- Engaged board members in strategic planning
- Cultivated new relationships and leaders

LISTENING, LEARNING AND DO-OVERS

During the strategic planning process, JDCF planned to host community listening sessions. They wanted to see where the organization could fill existing gaps in local communities and assess the readiness for a Jo Daviess Community Foundation. While listening sessions should have been central to a local needs assessment, they were, as Trifone-Simon describes them, “not well received.” JDCF only hosted one listening session, inviting members with the most vested interests in the Conservation Foundation to the first meeting. Only six people attended.

“If our closest supporters were not showing up to this, it either meant that this wasn’t the right tool or that they already thought we were doing such a great job that they didn’t need to come and give us comments or feedback,” says Trifone-Simon.

So the JDCF went back to the drawing board and allowed its approach to evolve.

“Nothing is ever simple,” says Trifone-Simon. “It takes creativity, and a willingness to experiment and we really put on our thinking caps as we approached these deep and critical questions that will help our organization to grow.”

JDCF sent an online survey to its members seeking responses to important questions and then devised a marketing strategy to bring greater awareness of its mission to the local community.

“Community is really the name of the game,” says Trifone-Simon. “This area is so small it needs to have support from a good majority of the folks to get anything off the ground and running. This Philanthropic Tools grant helped us with critical marketing to connect with some of the folks we wouldn’t have otherwise been able to reach without the grant.”

Two of the main responsibilities of any board are fiscal management and fundraising. JDCF’s board is really great at fiscal management; it’s not so great at fundraising.

“I’ve got one board member who just a few years ago said she would never ask for money. She would never fundraise for us.

“Today, after going through this process and the in-depth training made possible by CFGD, she is our number one fundraiser. She’s on fire and others from the board are seeing this board member’s success and are energized by it. In 2016, all board members will be hosting small fundraisers in their homes for JDCF. We are making progress and they are all loving it!”

Christie Trifone-Simon
Development Director
Jo Daviess Conservation Foundation
SHARING KNOWLEDGE AND EXPERIENCE

JDCF partnered with civic organizations and other local nonprofits, sharing best philanthropic practices for successful fundraising.

CITY OF GALENA AND GALENA GATEWAY PARK

In 2010, JDCF raised $1.4 million from community members to purchase the land for Gateway Park, which it then gifted to the City of Galena. The preserve sat idle until the Philanthropic Tools process began in 2014.

In 2015, JDCF began meeting with City of Galena officials and a committed group of volunteers who were motivated to make Gateway Park a true community asset. Since then, JDCF has led the effort to establish public amenities at Gateway Park through a fundraising campaign that launched in the spring of 2016.

VILLAGE OF HANOVER AND WAPELLO LAND AND WATER RESERVE

Another result of Philanthropic Tools has been the formation of a new partnership between JDCF, the Village of Hanover and the Friends of the Wapello Land and Water Reserve. The trio has worked together on a variety of projects to help maintain the reserve. Thanks to the shared fundraising knowledge from JDCF, progress is being made towards building a new visitor center at the reserve, which will promote education and conservation efforts.

MEET THE CHAMPIONS OF JO DAVIESS COUNTY.

JO DAVIESS

Kari McCann
Community Foundation of Greater Dubuque
Strategic planning coach

Christie Trifone-Simon
Jo Daviess Conservation Foundation
Dedicated conservation and development professional

Fran Peterson
Jo Daviess Conservation Foundation
Vice President of JDCF board with a passion for finance and fundraising

Steve Barg
Jo Daviess Conservation Foundation
Visionary director of JDCF

Frances Rivoire
Jo Daviess Conservation Foundation
Chairman of JDCF board

Fran Peterson
Jo Daviess Conservation Foundation
Vice President of JDCF board with a passion for finance and fundraising

City of Galena
Dedicated community leaders

Village of Hanover
Dedicated community leaders

DISCOVER OUR TOOLS

COMMUNICATIONS

Marketing Plan: As the complement to any in-depth fundraising plan, a marketing plan supports both short- and long-term objectives. JDCF is now able to integrate the marketing strategy into the overall development plan to increase the success rate of its efforts.

STRATEGIC PLANNING

Strategic Plan: A strategic plan is designed to guide all activities for a nonprofit organization over the course of 3-5 years.

The Five Most Important Questions You Will Ever Ask About Your Organization by Peter Drucker: This book is an excellent tool for self-assessment and transformation.

Lilly Family School of Philanthropy Certificate in Fundraising Management: This training course recognizes and substantiates a commitment to fundraising leadership.

EVENTS

Event planning worksheet: This tool helps planners create a detailed listing of jobs and assignments for JDCF events.

Data Analysis

Results Scorecard: The scorecard captured area demographics to ensure outreach to a broad segment of the community.

Member Surveys: Supporting members of the JDCF were surveyed to collect baseline data about demographics and attitudes about the JDCF.

Find these tools online at: philanthropictools.dbqfoundation.org/JoDaviess.
Reading proficiency by third grade is the most important predictor of high school graduation and career success. Yet every year, more than 80 percent of low-income children miss this crucial milestone.

During the 2014 school year, 24% of K-3 students in Jackson County were not reading at grade level and the average student missed eight days of learning. That same year, a group of caring citizens came together to change these numbers and plot a better future for the youth of Jackson County.
In 2013, when school administrator Kim Huckstadt noticed that young kids were not succeeding at his school because they couldn’t read, he approached the Community Foundation of Jackson County with the idea of becoming a Campaign for Grade-Level Reading community to make a difference for his students.

That dream became a reality in 2014 thanks to the Philanthropic Tools project grant, which supports training and technical assistance in Jackson County.

“Our board decided we wanted to put more emphasis on the youth in Jackson County because they’re our future,” says CFJC Executive Director Mary Jo Gothard. “We knew we needed to do something to help improve that area in any way we could.”

This project brought together schools, parents, nonprofits, community leaders and funders for a single purpose: to ensure more low-income children read at grade level by the end of third grade. Studies show that 74% of kids who are behind at this critical milestone do not graduate from high school.

Organizers held individual meetings with 60 Jackson County residents and formed a committee of 30 initial stakeholders in late January of 2015. After discussing eye-opening statistics—nearly a quarter of Jackson County students in kindergarten through third grade were not reading at grade level—committee members voted unanimously to become a Campaign community. “I know if we have a literate county, that’s the best thing for our students,” says Linda Nudd, Jackson County Grade-Level Reading Campaign coordinator. “I want our students to be successful and I will do anything I can to make that happen.”

One presentation was to a group of interns at Ohnward Bancshares at Maquoketa State Bank.

“All of the interns were engaged and asked lots of great questions,” reflected Corrine Kroger, Community Foundation of Greater Dubuque Grade-Level Reading coordinator. “It didn’t take long for the same group of young leaders to open the first Little Free Library in Maquoketa on July 23, 2015.”

By the end of 2016, there will be 10 Little Free Libraries throughout Jackson County.

Interns with Ohnward Bancshares at Maquoketa State Bank were inspired by the Jackson County Grade-Level Reading Campaign and helped open the first Little Free Library in Maquoketa on July 23, 2015. Their actions have since inspired community leaders throughout Jackson to set up 10 Little Free Libraries by 2017.

JACKSON COUNTY: THE OUTCOMES

• 50 stakeholders engaged on the Grade-Level Reading Steering Committee
• 32,974 Dolly Parton Imagination Library books mailed since the program started in 2010
• 10 Little Free Libraries built by 2017
• 46 students received free eye exams and 17 received glasses from Vision To Learn
A PLAN FOR ACTION

A network of dedicated partners from schools, nonprofits, higher education, businesses, neighborhoods and the faith community, led by the Jackson County Gradel-Level Reading Campaign, convened to develop a comprehensive, realistic and sustainable plan to improve the reading proficiency of Jackson County students by the end of third grade. The Community Solutions Action Plan (CSAP) for third-grade reading aims to drive progress in three areas:

1. SCHOOL READINESS
Children from low-income families are less likely to be read to or spoken to regularly or to have access to books, literacy-rich environments, high-quality early care, and prekindergarten programs. Interactions are critical for language development, an important precursor to literacy.

2. ATTENDANCE
Among low-income kids in the US, two in ten missed more than 18 days of school. These students can ill-afford to lose time on task, especially in the early years when reading instruction is a central part of the curriculum.

3. THE SUMMER SLIDE
Children from low-income families lose as much as three months of reading comprehension skills over the summer. By the end of fifth grade, they are often as many as two grade levels behind their peers.

SUMMER ACADEMY

In June, most kids are savoring the freedom of summer. School is a distant memory best avoided by riding bikes, going to the pool, and hitting the ice cream stand.

In 2016, however, nearly 160 Jackson County kids spent part of their summer improving their reading skills through the Jackson County Campaign’s Summer Academy, a program focused on maintaining or increasing the reading proficiency of students over break. Evidence shows that students experience learning loss during the long summer months when they are not engaged in learning activities on a regular basis.

Summer Academy is a prime example of the Philanthropic Tools project at work—convening partners and resources around a critical issue.

VISION TO LEARN

As many as 20,000 students in Iowa lack the glasses they need to see the board, read a book and participate in class. Due to lack of health insurance, difficulty accessing eye care providers and other obstacles, many students who are identified in state-mandated school vision screenings do not receive the follow-up care or glasses they need.

In 2016, the Community Foundation of Greater Dubuque, through its Dubuque Campaign for Grade-Level Reading initiative, partnered with the nonprofit Vision To Learn to address this problem in five elementary schools in Dubuque and Jackson County. Vision To Learn gives children access to vision care through Vision To Learn “vision vans,” mobile clinics that travel to school sites. Students receive a vision exam from an optometrist and, if glasses are prescribed, can choose their frames from a wide selection of colors and sizes. The exams and glasses are provided free of charge.

“Because of the networks formed by the Jackson County Campaign for Grade-Level Reading through this work with the USDA grant, our efforts were able to impact children in Jackson County as well as Dubuque,” says Corrine Kroger, Grade-Level Reading regional coordinator. “I don’t believe we would have been able to pursue Jackson County as a pilot community as successfully if it wasn’t for these new connections and partnerships.”

Vision To Learn optometrists examined a total of 178 students in Dubuque and Jackson Counties. Of those, 90 students received new glasses. All of the participating schools receive Title I funding and a high percentage of their students come from low-income families.

The pilot project has uncovered just how essential this outreach is:

- Many of the students identified as needing glasses have extremely high prescriptions, which is often an indication of a long-undetected vision problem.
- A significant number of students had been prescribed glasses at a young age and were still wearing the same prescription as many as four years later.
- A large number of students who should be wearing glasses have gone without for as long as two years because their current pair had been broken or lost.

1 http://gradelevelreading.net/our-work/school-readiness
MEET THE CHAMPIONS OF JACKSON COUNTY

Mary Jo Gothard  
Community Foundation of Jackson County  
Philanthropic advisor with a passion for promoting grade-level reading

Corrine Kroger  
Community Foundation of Greater Dubuque  
GLR regional coordinator connecting people and organizations to the cause

Linda Nudd  
Jackson County Campaign for Grade-Level Reading  
Educational leader planting reading strategies in her community

Katie Peterson  
Jackson County ISU Extension  
Summer learning coordinator conquering the summer slide

Maquoketa State Bank  
Strong local contributor to Grade-Level Reading efforts in Maquoketa

Community Foundation of Jackson County  
Board of Directors  
Investing local dollars to support young readers

COMMUNITY PARTNERS

The Jackson County Campaign for Grade-Level Reading committee of dedicated partners from schools, nonprofits, higher education, businesses and community organizations is led by the Community Foundation of Jackson County. Each partner has representation on one or more subcommittees that meet bimonthly to discuss three focus areas: School Readiness, Attendance and Summer Learning.

**Assurance Template**  In an effort to begin identifying the priorities for School Readiness, Attendance and Summer Learning, each Steering Committee member was asked to complete the assurance template, which would then be used for mapping out the Community Solutions Action Plan. Committee members were then broken up into groups and asked to develop goals for year one, year two and long-term.

**Jackson County CSAP**  The complete Community Solutions Action Plan (CSAP) addresses the three underlying focus areas that keep children, especially those from low-income families, from reading proficiently: School Readiness, School Attendance, and Summer Learning. The Jackson County Grade-Level Reading Steering Committee has developed goals and action steps for each of these Community Solutions Focus Areas. The CSAP will be the road map for the next three years. Committee members will make adjustments along the way and use data to monitor progress.

**Read 20 Daily**  Read 20 Daily is a tool used by community partners to visually communicate the disparities between children who have been read to or read a minimum of 20 minutes per day compared to those who are only exposed to a few minutes per day. Reading 20 minutes per day greatly impacts vocabulary and speech development, which have a significant impact on their ability to read at grade level in later years.

**Summer Learning – Summer Slide Video**  Students from low-income communities lose an average of more than two months in reading achievement over the summer months while their middle-income peers tend to make gains. Without exposure to learning opportunities during the summer, by the time a student completes fifth grade, he or she may be as many as two grade levels behind. This video illustrates this disparity visually and is used to build awareness within the community.

**Statisticks Lottery Video**  The national Campaign for Grade-Level Reading and its 200+ partner communities are dedicated to narrowing the gap between children from low-income families and their more affluent peers. This video shows why that gap occurs and how we can close it.

**DISCOVER OUR TOOLS**

**Book Lists**  Reading with your child starting at birth fosters a love of books and reading right from the start. These tips and recommended book lists, provided by Reading Rockets, offer fun ways to help parents encourage a love of reading while helping their children to develop confidence.

**Read 20 Daily**  Read 20 Daily is a tool used by community partners to visually communicate the disparities between children who have been read to or read a minimum of 20 minutes per day compared to those who are only exposed to a few minutes per day. Reading 20 minutes per day greatly impacts vocabulary and speech development, which have a significant impact on their ability to read at grade level in later years.

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**Find these tools online at:** philanthropictools.dbqfoundation.org/Jackson.
In the far northeast corner of Iowa sits the river town of Harpers Ferry.

Located in the heart of the Driftless Area, this long, narrow community is framed by bluffs and water. Here, far from the noise of the city, you’ll encounter welcoming smiles at Barry’s Ice Cream Store and a friendly wave from Norm Delphi as he fuels up another fishing boat. With a permanent population of slightly over 300 people, local Bill Nation describes his community as “a town with more golf carts than people.” Harpers Ferry is quiet, and its citizens are proud of that.
In the summer of 2015, Harpers Ferry Booster Inc. was already familiar with community betterment. With a mission to improve and promote the community, the Boosters had been strengthening Harpers Ferry one bake sale at a time for several decades. In addition, each year the Boosters hosted Christmas Magic, a spectacle of lights in the park, as well as the Firecracker 5K Run/Walk, which drew hundreds of visitors to the valley on Independence Day.

When the Philanthropic Tools project began, it was natural this group would take charge in improving their small river town through a new community-wide initiative called Harpers Ferry/Vision for Our Future.

“All of the ingredients were there for a better Harpers,” says Boosters President Betty Steege. “It was just putting it together and making it taste good,” she adds with a smile.

Steege’s enthusiasm and vision was evident from the beginning. She understood the value of the USDA-supported tools, training and technical assistance and was able to inspire others to action with these resources.

Together the Boosters rallied for broad-based community support from area businesses, community members, and local leaders. They worked with Community Foundation staff to make signs, hand out fliers, and send mailers to every household, encouraging everyone to share their voices. The Boosters hosted seven community conversations at key locations and then, with Mayor Jerry Valley’s support, planned a Mayor’s Dinner to celebrate the town’s assets, share survey and conversation results, and form working groups.

On a rainy day in June 2015, more than 80 community members, young and old, lifetime residents and new, gathered in the Harpers Ferry Community Center to enjoy grilled brats and ice cream with fresh strawberries in celebration and collaboration. Together they discussed the results of the community conversations and shaped their vision for the future.

Working groups formed to address four themes that arose from these discussions: increasing the number of young families, growing small businesses and jobs, enhancing service to tourists, and increasing the number of permanent residents.

Mayor Valley hopes the initiative will help renew the spirit of community he remembers from his childhood. “It was always great growing up in Harpers,” he says.
THE SURVEY

Residents of Harpers Ferry were asked to respond to the following questions online and at six Community Conversation events:

What is the biggest strength of Harpers Ferry?
What are the three most significant accomplishments of the Harpers Ferry community in the past 15 years?
If you could change one thing about Harpers Ferry today, what would it be?
What is the biggest challenge the Harpers Ferry community faces?
What do you think the Harpers Ferry community priority should be for the next three years?
What would your dream be for the Harpers Ferry community?

Every community has pains (rising at-risk youth or need for economic development) and passions (the desire for a new community center or a youth section in the town library). Take a moment and write your community’s pains and passions. Then open up for group discussion.

At the Mayor’s Dinner on June 11, 2015, focus groups formed around four themes that rose to the top based on these community surveys:

MEET THE CHAMPIONS OF HARPERS FERRY

Betty Steege
Harpers Ferry Boosters
Philanthropic Tools expert sharing time and talent with volunteers

Karen Soper
Harpers Ferry Boosters
An accountant and marketing wizard building community awareness

Theresa Gallagher
Sisters of the Presentation
Retired educator coaching volunteers toward action

Lindsey Deason
Community Member
Working mom who signed on to lead the young families working group

Pat Cota
Community Member
Construction expert sharing his knowledge with the community

Larry Schulte
Community Member
Committed to addressing needs of permanent residents

Susi Nehls
Community Member
Grantwriting mentor urging success with every sentence

Jerry Valley
Harpers Ferry Mayor
Elected leader in his hometown putting his stamp on a vision for the future

DISCOVER OUR TOOLS

BUSINESS DEVELOPMENT
Business Planning Guide: For those thinking of starting a business
Community Brochure: To drive tourism and business to Harpers Ferry and the surrounding area

COMMUNITY VISIONING
Community Visioning Outline: Framed steps toward meaningful, community-based change
Community Conversations Script: Used by local coaches to engage listening session participants
Community Listening Conversation Questions: Shared at listening sessions and online for those who couldn’t attend
Senior Housing Needs Assessment: Based on local survey response
Increasing Year-Round Residents Community Survey: Surveyed local interest in senior housing

CAPITAL CAMPAIGNS / FUNDRAISING
Guidelines for Capital Campaigns for Community Projects: Shared best practices for launching successful capital campaigns
Splash Pad Capital Campaign Mailer: Promoted capital campaign for a new splashpad

COMMUNICATIONS / STORYTELLING
Mayor’s Dinner Flyers, Posters, and Lawn Signs: Posted in key locations to promote attendance at community event
Harpers Hub Tri-fold: Examples of table tents posted at locations around town to share upcoming community events and news

EVENTS
Mayor’s Dinner Checklist and Agenda: Event planning checklist
Placemats: Shared community conversations results to drive discussion at Mayor’s Dinner

GRANTWRITING
Splash Pad Proposal: Successful $20,000 grant application to leverage funding for community splashpad

LESSONS LEARNED: Ways to make an exceptional proposal based on local experience

Find these tools online at: philanthropictools.dbqfoundation.org/HarpersFerry.
“We’ve been gathering stories in Monticello for the past six months so we can understand what matters most to the people living, working and recreating here. We also want to know what would make life in Monticello even better. We will use these stories and information to build a road map for making community decisions based upon our shared vision and values.”

– JEAN SULLIVAN, MONTICELLO HEART & SOUL
In April 2016, more than 100 people filled the Citizen’s State Bank Youth Development Center at the Great Jones County Fairgrounds in Monticello for Celebrate Monticello. The celebration brought friends and neighbors from all parts of the community together to share food and good conversations about what makes Monticello so special.

“We had been gathering stories in Monticello for the past six months so we could understand what matters the most to the people living, working and recreating here,” says Jean Sullivan, Monticello Heart & Soul coordinator. “The Celebrate Monticello event gave us an opportunity to share those stories with the community to generate further conversations and to help us build a road map for making community decisions based upon our shared vision and values.”

Celebrate Monticello was just one of the many ways Monticello Heart & Soul has been working to make Monticello a better place.

“Community Heart & Soul reconnects people with what they love most about their town and translates those personal and emotional connections into a blueprint that serves as the foundation for future community decisions,” says Jason Neises, community development coordinator for the Community Foundation of Greater Dubuque (CFGD). “It’s a barn-raising approach to community planning and development designed to increase participation in local decision-making and empower residents to shape the future of their communities in a way that upholds the unique character of each place.”

“I think people have been feeling very proud about the community since we’ve been working through this process,” adds Sullivan.

Dollars from the USDA grant have supported the implementation of the Orton Foundation’s innovative Heart & Soul community engagement pilot program in Monticello. Monticello was selected as a community that seemed ready for the types of dialogue, introspection, and action that takes place through the Heart & Soul process. In coordination with the Jones County Fair Association (JCFA) and after extensive analysis of the demographics and dynamics in Monticello, Sullivan formed a core team of volunteers. Working with CFGD, Sullivan and the core team engaged the community through interviews, events, videos, surveys, print media and social media to find out what matters most to residents. After ensuring universal understanding around these shared values, the community will make decisions about the future and take action to make the community stronger and more resilient.
EVERY VOICE MATTERS

Heart & Soul Monticello strives to ensure that everyone in the community can participate in the community-planning process. After conducting a “community network analysis,” the core team identified the different voices in Monticello, and found some that had little involvement in past planning or visioning processes. Sometimes these voices were not heard because “town hall” meetings were not convenient. For Monticello, that has meant future planning will include efforts to meet people where they are.

“When they hear someone talk about Heart & Soul, they feel like they made a contribution.”

– JEAN SULLIVAN, MONTICELLO HEART & SOUL

COLORING CONTEST

“We said, ‘How can we reach out to kids?’” says Sullivan. “We put out coloring sheets and asked them, ‘What do you love most in Monticello?’ Some took the opportunity to draw their favorite place to go like the Cone Shoppe (ice cream was a big item for the kids) and the pool, but some of them were even deeper. Some of them were pictures of rolling hills around the community and those were the things that they loved. Some drew pictures of their families because that’s what matters most to them. I’m not sure how we ever would have gotten that if we had them fill out a survey.”

HIGH SCHOOL COMMUNICATIONS CLASS PROJECT

At Monticello High School, students conducted video interviews with other high school students, families and friends as part of a class project. It was fascinating to see which subjects the students chose to interview, and the approach effectively gathered authentic stories from a wide range of residents.

OUTREACH AT JONES COUNTY FAIR

“Everyone who is familiar with this area has heard of the Great Jones County Fair, so at the fair I asked people, ‘What do you love and what would improve Monticello?’” says Sullivan. “I got hundreds of responses and people loved it.” While some of the people interviewed weren’t actually residents of Monticello, Sullivan notes that it’s also important to hear from people who visit town to recreate, shop and do business.

COMMUNITY INTERVIEWS

Community interviews were conducted at local businesses, the public library, the laundromat, and other locations to capture voices that weren’t included in surveys. Heart & Soul volunteers sought out local leaders to ensure their ideas were heard, as well as people who may otherwise not have been included due to transportation, childcare, work or other obstacles.

200+ SURVEYS

The team collected surveys online and in person from members of the community including food pantry patrons and Meals on Wheels recipients. The survey questions are similar to those used for interviews to ensure that the collected data can be repurposed in many ways. The online surveys often solicited deep, thoughtful responses to open-ended questions because the respondents had time to compose their thoughts and provide insightful information.

AREA FOCUS GROUPS

Focus groups included target audiences like Camp Courageous employees, Rotary members, and other social club participants. Meeting these folks “on their turf” to solicit ideas was a powerful way to collect strong insights and ensure that all community voices were included. Volunteers on the core team received special training on leading focus groups and capturing the data from the discussions.
MEET THE CHAMPIONS OF MONTICELLO

Jean Sullivan
Heart & Soul Monticello Coordinator (CTA)
Former mayor, City Council Local pastor leading the team of volunteers doing Heart & Soul work in Monticello

Tom Yeoman
Former mayor, City Council Local business owner who is eager to see what the future holds for Monticello

Leann Herman
Owner, Java Jones Board member, Jones County Community Foundation Has her finger on the pulse of the community

Casey Rayner
Community member Young, emerging leader and lifelong resident of Monticello with a passion for outdoor recreation and working with youth

Jason Neises
Heart & Soul Midwest Coordinator Leading team of volunteers launching the pilot for the Heart & Soul Midwest Network in Monticello.

Shelia Tjaden
Jones Regional Medical Center Lifelong resident of Monticello with a child in the local high school

Anna Taylor
Community member Young leader in the community who wears many hats, including postal worker, painter and mom

Mary Phelan
Director, Chamber of Commerce Newcomer to Monticello who brings fresh ideas and enthusiasm to the process

Katie Farrowe
Co-owner, The Little Wine Bar Moved back to town with her husband to reconnect with family as their own family grows

Doug Herman
Monticello City Administrator Strongly supported the Heart & Soul story-gathering process and kept the leadership team connected to city projects and priorities

Jane Lawrence
Jones County Education Center of Kirkwood Community College Encourages students along the educational journey from high school on

Shannon Poe
Coordinator of Volunteers and Respite Care at Camp Courageous of Iowa Welcoming campers with disabilities for many years

Cheryl Dirks
Real Estate Agent and Lifelong Resident Involved with planning efforts in the city for many years

Deb Bowman
Retired English teacher and speech and drama coach Has been telling stories about Monticello for years through the “Mysteries of Monticello” walking tour

Discover Our Tools

COMMUNICATION / STORYTELLING

STORYTELLING
- find these tools online at: philanthropictools.dbqfoundation.org/Monticello.

- Celebrate Monticello! Flyers: Publicity tools distributed widely throughout town to publicize the event
- Publicity Plan: List of the tasks, deadlines and assignments for the core team covering the many different methods being used to spread the word about the first major event

DATA / ANALYSIS

- Demographic survey: Used to capture basic demographics at any event to ensure outreach to a broad segment of the community
- Network Activity: Outline of the activity used to generate ideas and connections with the various groups of people who live in Monticello
- Network Brainstorm: Results of the community network analysis activity used to understand who lives in the community and what voices need to be heard within the process
- Community Survey: Survey was distributed via email and hard copy to various audiences to collect baseline data about demographics and attitudes about Monticello

EVENTS

- Event Planning Worksheet: Detailed listing of the jobs and assignments for the first major event planned by the H&S team

Find these tools online at: philanthropictools.dbqfoundation.org/Monticello.
On an early morning in Edgewood, community members in black and gold Edgewood-Colesburg High School (ECHS) gear chat as they jog in the street.

The local high school is the cornerstone of social life in this community of 900 situated on the Clayton and Delaware county line. Here, generations of ECHS Vikings cheer on the home team at football and basketball games. The Community Dreams athletic complex, host to softball and baseball games and a small indoor practice facility, is a source of community pride. And, just blocks away, the Edgewood Rodeo brings locals and visitors together every June with activities for all ages including a 5K run/walk.

This common interest in athletics and active living drove Edgewood Economic Development and city leaders to engage with Philanthropic Tools. Together, they challenged citizens and community leaders alike to answer this question: Can we shape our community by staking the claim that recreation and wellness is not only important but vital to the future of Edgewood?
Elise Bergan, Edgewood Economic Development director, led the Philanthropic Tools project in Edgewood. In between her Facebook posts to promote the homecoming mum sale and updating the rodeo schedule, Bergan convened her board, chamber of commerce officers, school board members, and elected city council volunteers to face their collective future. To say that she cracked her own whip around the ring of the community is not an overstatement.

Corrine Kroger, an experienced parks and recreation planner from the Community Foundation of Greater Dubuque, would become Bergan’s advocate and advisor. Together they started to inventory the community amenities already in place, a listing of programs and services that were keeping community members active.

Next they teamed up with a hometown guy, Cody Funk of Insight Design Solutions, a landscape architect firm based nearby in Cedar Falls. The three champions defined a community needs assessment process to drill down and discover the recreation and wellness priorities of Edgewood residents.

They started this process with interviews. In meetings with business leaders, they celebrated current offerings, such as kickboxing classes taking place in open spaces above retail businesses.

“We learned about who was jogging at dusk or hopping on sidewalks early in the morning just to move and recreate,” reflects Kroger.

With interview findings in hand, Bergan, Kroger and Funk partnered with the University of Northern Iowa (UNI) to develop a household community survey. After mailing the survey to over 250 households within the city of Edgewood, the trio expected the typical 20-25% response rate. They were elated when 48% of surveys were returned, indicating a very active and engaged community.

“People in Edgewood had their voices heard and demonstrated they really care about recreation and healthy lifestyles,” says Kroger.

Next, UNI students helped facilitate a house-to-house survey to fill in gaps from the mail-in survey. In November 2015, Edgewood Economic Development hosted a community engagement event that brought together 65 residents to celebrate the findings.

“We had two major themes emerge from this process and they really fell in line with the original plan developed by Edgewood Economic Development to create a healthy and vibrant Edgewood,” says Kroger. “The first theme was expanding existing trails or sidewalks within the community or developing new trails within or around the city. The second theme involved the current aquatics facility and whether improvements were needed.”

“People in Edgewood were vocal about providing more trails and sidewalks within Edgewood,” Kroger continues. “The study also revealed an interest in building a community ice rink and aquatics center.”

“People in Edgewood have stepped up to say they want to help and now have an opportunity to be involved in the process and committee chair and the design,” Kroger says. “Two themes emerged: expanding existing trails or sidewalks within the community or developing new trails within or around the city. The second theme involved the current aquatics facility and whether improvements were needed.”

“We can step up to our volunteers and say we have experts willing to help and see us succeed.”

-ELISE BERGAN, EDGEWOOD ECONOMIC DEVELOPMENT
should be made to the existing structure or if a larger facility should be constructed for the long term."

On that November night, after roundtable discussions, a majority of residents expressed a desire to see new trails implemented throughout the community. To create safer, more efficient and inviting walking options, participants also suggested that trails intersect at major hubs, such as the Community Dreams athletic complex, Edgewood’s recreation master plan will accomplish that."

Community members also expressed strong interest in addressing the aging swimming pool. As the meeting broke up, residents volunteered for a working group to drive the agenda forward. Working groups, the Edgewood City Council and Edgewood Economic Development are currently discussing next steps, including potential grant funding to create a recreation master plan.

"Anybody can say, ‘I want to achieve these goals in the next five years,’” says Kroger. “But you have to have steps for implementation to ensure success. By doing that, you engage the right people, and you get community leaders and working groups with vested interests to keep it moving along. Edgewood’s recreation master plan will accomplish that."

**A HEALTHY AND VIBRANT FUTURE** (Continued from page 36)

MEET THE CHAMPIONS OF EDGEWOOD

Elise Bergen
Edgewood Economic Development
Local leader with a passion for growing recreation in her community

Corrine Kroger
Community Foundation of Greater Dubuque
Dedicated coach with a background in community planning and data analysis

Cody Funk
Insite Design Solutions
Local landscape architect and Edgewood native

Chris Kowalski
University of Northern Iowa
Educator with a passion for health and leisure services

COMMUNITY PARTNERS

Edgewood City Council
Edgewood Economic Development
Edgewood Chamber of Commerce
Edgewood School Board

DISCOVER OUR TOOLS

| City Council Presentation | Includes an overview of the Healthy & Vibrant Edgewood project, role of the USDA grant, introduction to the project team and an outline of the project process |
| Dynamic Sustainable Edgewood Plan | Informed the needs assessment, includes forecasts for housing, business development and recreation as well as a list of community assets and resources |
| Engagement Placemat | Offers a snapshot of community needs assessment, used at community engagement event |
| Survey Results PowerPoint | Includes a review of the results from the 2019 Edgewood Community Survey, which was distributed to a sample size of 388 households and resulted in a return rate of 48% or 205 responses |
| Edgewood Survey Design | Developed with input from the University of Northern Iowa, Community Foundation of Greater Dubuque, Edgewood Economic Development and Insite Design Solutions, this survey was shared with Edgewood households as part of the community needs assessment process |
| November 5 Presentation: Results from the community needs assessment and demographics and trend report were shared with 65 residents in Edgewood. Participants reflected on the data and broke into small groups for facilitated conversations about trail and aquatic development for the community |
| October 12 Presentation: Shared with the city council and school board, this presentation included highlights from the community survey, input sessions and stakeholder interviews, and outlined next steps |
| Final Report: Edgewood Economic Development worked with the Community Foundation of Greater Dubuque and Insite Design Solutions to complete a community input process to further support the three-year plan for a Healthy and Vibrant Edgewood. The purpose of this report is to identify the needs and priorities for Edgewood and determine next steps for capital improvements. The process included extensive reliance on resident input. This report includes results from community input, a community survey and a demographics and trend report. |

Demographics and Trend Report: The following tools were used to develop an overall analysis of the demographics of Edgewood, local recreation trends compared to national trends and potential spending trends by 2020. These reports were obtained from Environmental Systems Research Institute, Inc., the 2010 U.S. Bureau of the Census, and the Sports, Fitness & Leisure Activities Topline Participation Report 2015 developed by The Sports and Fitness Industry Association.

- 2010 Census
- Demographic and Income Comparison
- Recreation Expenditures
- Site Map
- Sports and Leisure Market Potential

Healthy Dynamic Edgewood Plan: 20-Year Vision: This 20-Year Vision was based on input from focus groups, stakeholder interviews and the community needs assessment.

Find these tools online at: philanthropictools.dbqfoundation.org/Edgewood.

Top Community members attending Edgewood’s November community meeting received placemats like this one to summarize survey results and generate open conversations.
LESSONS LEARNED

As this project concludes, our Community Foundation of Greater Dubuque team has learned the following:

1. There is no substitute for authentic and passionate leadership.
   
   In Harpers Ferry, a young mom simply wanted a Splash Park for her family. With tools and encouragement, she created a plan, presented to the city council, wrote a successful grant, and led her community to success.

2. Communities will embrace hard work when goals are clearly defined.
   
   In Jackson County, partner after partner joined the effort to help third grade readers meet important benchmarks. The goal was as clear and clean as a chalkboard at Cardinal Elementary on the first day of school.

3. Progress is preceded by planning—and that requires patience.
   
   In Edgewood, the city and its leaders have a sharper focus and a specific plan for their dynamic future. But the trails are not built and the swimming pool is not fixed. Capital projects that shape communities forever are accomplished one meeting at a time. It is only with patience and persistence from planners that earthmoving for new projects gets started.

4. Investment in development staff pays back in new donors and new dollars.
   
   At the Jo Daviess Conservation Foundation, the Philanthropic Tools support through USDA created space and support for a talented staffer to develop and implement a plan to engage a whole community around investing in the preservation of a beautiful land.

5. Every community has assets to be celebrated and enhanced.
   
   In Monticello, the Heart & Soul project lifted up a thousand reasons people love their town. Like a Ferris wheel ride at the Great Jones County Fair, the view of Monticello’s positive future, built on its assets, is wide and clear.

   Community Foundation of Greater Dubuque leaders will now take a whole set of new Philanthropic Tools together with these timeless lessons to other self-determined places we serve.

   Our continuing call is: How does the community win?

Q&A WITH DON MACKE

Co-Founder and Director of The Entrepreneurial Communities Solution Area Center for Rural Entrepreneurship

Q: As a consultant, what impressions did you gain about the work of CFGD staff members as they implemented philanthropic tools in five self-determined communities?

A: My engagement was limited but I really learned and benefitted from this experience. I found the Foundation’s team very passionate and engaged. There is a deep commitment to the communities and their leaders. The Foundation’s team and local leaders were most receptive to our technical assistance. This was not passive engagement but active engagement where both the Foundation and the communities were working hard to find the right fit. We love clients who engage so actively cross-walking our assistance with their needs and preferences.

Q: Looking at the project from afar, what were the challenges and opportunities that might be common to other rural communities, and how are community foundations meeting those?

A: Every rural community is unique but has the same development capacity challenges and opportunities. There were no major surprises. What we consistently find is that 80% of what we encounter is common to every community and that the 20% that is unique requires careful listening and understanding so that engagement processes and solutions are customized to fit.

Community foundations are uniquely positioned to be development gateways and partners with both urban and rural communities in their service territories. The Community Foundation of Greater Dubuque is a leader in my opinion nationally among rural Community Foundations with respect to its commitment to community building and its engagement approach.

ACKNOWLEDGEMENTS

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Special thanks to our partners at Union-Hoermann Printing in Dubuque.

In appreciation, on behalf of the communities we are privileged to serve,

MJ Smith, Project Leader
Director of Affiliate Foundations, Community Foundation of Greater Dubuque
In 2014, the Community Foundation of Greater Dubuque was one of 48 nationwide recipients of a USDA Rural Community Development Initiative grant. The grant provided more than $150,000 and funded community engagement efforts to empower leaders to build greater prosperity and sustainability in five rural communities in Iowa and Illinois.

Philanthropic Tools works in strategic alliance with the Community Foundation of Greater Dubuque and the USDA Rural Community Development Initiative.