

South Cumberland Community Fund 2023-2026 Strategic Plan

12/19/22

Table of Contents

| | |
|---------------------------------------|----|
| Introduction | 3 |
| Plan Development Process | 4 |
| SCCF Profile | 5 |
| Vision, Mission | 5 |
| Values | 6 |
| Theory of Philanthropy | 6 |
| Sower—Archetype in Practice | 8 |
| Internal Appraisal | 9 |
| SWOT Situation Analysis | 11 |
| Strategic Priorities Reflection | 12 |
| External Appraisal | 15 |
| South Cumberland Assets | 20 |
| South Cumberland Challenges | 21 |
| 2023-2026 Community Impact Priorities | 23 |
| Community Vision | 23 |
| Strategic Direction | 23 |
| Education | 24 |
| Housing | 27 |
| Transportation | 32 |
| 2023-2026 Operational Priorities | 33 |
| Final Notes | 36 |

INTRODUCTION

Since 2012, the South Cumberland Community Fund has provided vital philanthropic and capacity building support to nonprofit organizations serving Tennessee's South Cumberland Plateau. The establishment of the fund marked history as it was "the first local philanthropic entity to serve the tri-county area of the Plateau."¹ For more than a decade, the fund "has partnered with local community organizations to address a range of health, education, and community and economic development issues."²

The fund has a proven track record of responsive grantmaking. In the years since its first grant cycle disbursed \$83,000 to nine organizations, the fund has made 206 grants to 67 area nonprofits, schools, municipal government, and churches. Through the grants program SCCF has invested more than \$1.4 million in the community. Additionally, through an innovative collaboration with the University of the South, the organization has contributed more than \$600,000 to a community development initiative, focusing on organizational capacity building through direct grants and an AmeriCorps VISTA program. That effort has helped leverage additional philanthropic and government resources to bolster efforts addressing issues ranging from children's food insecurity to housing quality.

Over the past two years SCCF has achieved notable milestones and provided vital support to the Plateau through the COVID-19 pandemic.

Milestones (2020-2022)

Endowment surpasses \$1 million, continued outreach during the COVID-19 crisis, creation of an honorary board, community surveys and community conversations, MountainTop Housing Summit, securing new board members, teacher training for children in crisis, launch of the special places project, the 10th anniversary symposium, launch of the AmeriCorps program for direct support, initiated the fund's first collaborative grant round, provided support for a new free medical clinic.

The fund's accomplishments were achieved with a talented professional staff and a board of directors devoted to fulfilling SCCF's mission.

¹ South Cumberland Community Fund, <https://www.southcumberlandcommunityfund.org/our-mission>

² Ibid

SCCF is a lean organization with a large impact.

- 1 full-time employee, 1 part-time employee
- 2 contractors provide administrative support
- 16 members of the board of directors
- 150 volunteers (2020-2022)
- \$390,000 operational budget in 2022
- 24 grants totaling \$90,000 issued in 2020
- 22 grants totaling \$119,000 issued in 2021
- 29 grants totaling \$190,000 issued in 2022
- 206 grants totaling \$1.4 million issued over 10 years

SCCF's staff and board of directors engaged in a strategic planning process to pave the way for the fund's future. The plan's focus is on how to continue to elevate SCCF's philanthropic practice in order to have an even greater impact on the region over the next three years.

Plan Development Process

The 2023-2026 plan development process transpired from September to November 2022. There were three parts to the process, a reflection retreat (October 10), an environmental scan of current regional conditions (September-November), and a planning retreat (November 7).

The reflection retreat with SCCF board members, staff, and collaborators focused on the past two years of fund operations—grantmaking as well as programming. Retreat participants considered the fund's achievements, challenges, and critical lessons learned with regard to current strategic plan implementation. The retreat also established clear strategic pathways for enhancing the fund's work, outcomes, and sustainability.

Key questions considered during the reflection retreat were:

- How do we ensure that our work is rooted in the best philanthropic practices?
- How do we actually help to improve conditions in our community in transformative and sustainable ways?
- What are SCCF's opportunities for improvement?
- What are possible future directions for the fund?

Utilizing data from the U.S. Census Bureau, the County Health Rankings, *U.S. News and World Report* and the *Report on Existing Community Strengths, Challenges, and Ideas*, board members scanned the environmental context in which SCCF does its work considering regional assets, challenges, and desires. The review centered on conditions in Grundy County and considered indicators regarding the county's population health, education, housing, food and nutrition, the environment, community vitality, infrastructure, economic stability, and general

quality of life.

The purpose of the planning retreat was to determine strategic priorities for the fund's plan. SCCF board and staff members identified and defined priorities and considered strategies related to them. The strategies serve as guideposts for the organization's plan.

The overarching question that guided the planning session was: *What community impact do we desire to have?* Related to this question fund leaders considered:

- How will we actually help to improve conditions in our community in transformative and sustainable ways?
- What will be SCCF's priorities for the next three years? How are these priorities aligned to our values?

This document lays out the responses to these questions.

SCCF PROFILE

The vision, mission, and values of the South Cumberland Community Fund remain the backdrop of this plan.

Vision

The fund's original vision statement offered a compelling desired future state for the region.

The vision of the South Cumberland Community Fund is that the Plateau be a place of hope and prosperity for all its residents and communities, inspired by the fund's philanthropic and regional leadership.

During the reflection retreat, board members considered minor, recommended edits to the vision statement. The revised statement expresses the future state of the region in a more community-centered way.

The Plateau is a place of hope and prosperity for all its residents and communities.

Mission

The fund's mission statement clearly articulates what the fund does to help the region advance toward the vision.

The mission of the South Cumberland Community Fund is to improve the quality of life across the Plateau by increasing philanthropic giving and providing community leadership to

- *Build on the strength of the area's people, communities, and natural setting.*
- *Enhance community capacity and collaboration.*
- *Support innovative ways to solve community problems.*

Values

The fund's values serve as the guiding principles for its work. During the reflection retreat the board and staff affirmed these principles.

At the South Cumberland Community Fund we believe:

- In the worth and dignity of all people of the South Cumberland Plateau.
- In being good stewards of the resources entrusted to us.
- Young people on the Plateau are the area's hope for the future.
- The area's exceptional human, historic, philanthropic, and natural resources can all contribute to a better future for the Plateau.
- Innovative philanthropy has an important role to play in improving lives on the Plateau.
- In inclusion, and in the value of people across the Plateau being part of the work.

Theory of Philanthropy

An organization's theory of philanthropy "delineates how it fundamentally contributes to change."³ Understanding this helps with overall stewardship and strategic decision-making. As part of Harbour Workshop's support of SCCF's planning process, the firm used notes from the reflection and planning retreats, along with results from a guided inquiry session with SCCF's director, to articulate why and how the fund uses its resources to achieve its mission and advance toward its vision.

Insights

SCCF is an independent foundation that serves to realize the potential of the Plateau and address the region's pressing issues through grantmaking, capacity building, and fostering collaborative endeavors. With regard to grantmaking and social impact, SCCF's approach is community-stakeholder centric. The organization intentionally drives change by directing investments toward initiatives that cut across systems and structures impacting health, education, and economic and community development.

The fund's giving scope is fairly broad—which according to Rockefeller Philanthropy Advisors (RPA), "enables it to work in a wider range of issue areas. This ... gives the organization the opportunity to think about which issues need the most attention, or where the stakeholders

³ Rockefeller Philanthropy Advisors

feel they can have the most impact.”⁴ Through its regular grantmaking cycles, SCCF generally uses a responsive approach to grantmaking. The organization is regularly in touch with—and open to input from—its grantee and stakeholder partners. A challenge for the organization—being in an area with great assets and great need—is to avoid the latest trends from the field, which are often not designed to be implemented in rural contexts; and to avoid what RPA calls, “the pitfalls of fixating on short-term objectives rather than long-term goals.”⁵

In terms of SCCF’s social compact with its service area, the fund is primarily accountable to its community stakeholders and its board, and its activities are led by its guiding principles. To do its work effectively, it relies on public trust/good will, strong connections with the tri-county communities served, and strong relationships with its growing network of grantees. SCCF “proactively seeks partnerships with the public and private sectors in order to achieve wide-ranging, systems or scalable impact.”⁶

Fundamentally, SCCF pursues a wide-ranging community transformation agenda—one that leverages grantmaking with the intention of seeding promising approaches and collective strategies. SCCF’s growing network of partners provides the organization with “invaluable exposure to ideas and approaches generated by others, and benefits from the multiplier effect of collaboration.”⁷

Operating Archetype—The Metaphor

During the planning process, SCCF leaders were asked to come up with a metaphor to describe the fund’s philanthropic approach. The metaphor remained elusive during the planning sessions. Harbour Workshop’s research discovered operating archetypes developed by Rockefeller Philanthropy Advisors.⁸ The archetypes articulate “how the organization deploys its resources, capacities, relationships, and principles to implement its vision and strategy.” Out of the eight archetypes delineated by RPA, the archetype of Sower fits SCCF best. Here’s a description of that archetype and its core attributes.⁹

⁴ Ibid

⁵ Ibid

⁶ Ibid

⁷ Ibid

⁸ “Operating archetypes flow from The Philanthropy Framework, which was developed in 2019 based on interviews with 75 foundations and dozens of working sessions with more than 200 funders, experts and research partners in the US, Europe, Asia, Africa, and Latin America.” The eight archetypes are Talent Agency, Think Tank, Campaign Manager, Field Builder, Venture Capitalist, Designer, Underwriter, and Sower.

⁹ Rockefeller Philanthropy Advisors, <https://www.rockpa.org/wp-content/uploads/2022/04/Operating-Archetypes-Philanthropys-New-Analytical-Tool-for-Strategic-Clarity-2.pdf>

SOWER

Provides grants across a diverse range of individual actors and institutions, often exercising responsive, flexible, and participatory grantmaking. Sowers bet on the cumulative effect of this approach to seed wide-ranging change.

| | Attributes |
|---|---|
| Reason/Value Proposition (what you do and why) | Desire to have broad-ranging impact across many areas in a broad field or specific geography |
| Resources (the primary assets—financial or non-financial—used to fulfill the mission) | Reach |
| Key Capabilities/Skills (What are your top skills, expertise or capabilities?) | Identifying change-makers, breadth of vision |
| Equity (How do you include the voices most affected and share power?) | Establish robust feedback loops for substantive input in decision-making |
| Response/Activities (What do you do to tackle the problem and/or advance a solution?) | Provide large quantity of funding. Convene cohorts and networks. |
| Primary Audience (for whom do you do it) | Issue/initiative-specific stakeholders (grantees) |
| Community Served (What community(ies) do you serve?) | A wide range of underserved sectors or communities/a broad range of communities and sectors |
| Relationships/Alliances (with whom do you do it) | Advisors, experts, opinion/sector leaders, peer funders |
| Impact Assessment (Where do you look for results?) | Key indicators of community reliance and well-being improve over time (desired), funded organizations prove their model (current) |

RPA notes the importance of exploring a philanthropy's operating archetype.

“Understanding an organization’s operating archetype allows leaders to better articulate how it uses its resources, instruments, and capacities to fulfill its vision. Archetypes can help funders better understand where they are (current state), where they want to go (aspirational state), how they compare to other players in the field, and their unique position in the ecosystem of other philanthropies and partners. Understanding operating archetypes enables a philanthropy to:

- Better align existing resources, skill sets, and approaches.
- Map potential gaps in internal capabilities or external changes that must be addressed.

- Allow for thoughtful strategic pivots, including scaling up or spending down operations.
- Ensure the different operating archetypes employed by an organization compliment one another.
- Illuminate and eliminate tensions in how a philanthropy views itself and how it actually works.
- Address issues of equity and inclusion.
- Design impact assessment methods that link to the funder’s operating approach.”¹⁰

Operating archetypes are not static. As organizations deal with changing internal and external dynamics, leaders should revisit the assumptions of the attributes.

Archetype in Practice

Sowers are especially well positioned to embrace trust-based philanthropy because they put those closest to the challenges being addressed at the center of their work.¹¹ Sowers also lead with relationships/networks, flexibility/agility, and knowledge, and maintain more hands-off approaches that allow grantees to envision and drive their own programming.¹² Sowers invest in communications as a way of enhancing transparency, trust, and more equitable power dynamics.¹³ To effect systems change, Sowers lean into their internal expertise and knowledge, extensive networks, proximity to target audiences, convening power, capacity-building, and advocacy or communications abilities.¹⁴ Sowers often engage in experimental funding and make “big bets” on innovative ideas which may create unexpected results that require a different type of goalpost for impact assessment.¹⁵ Sower leaders tend to be generalists who can convene, cultivate networks, and build relationships.¹⁶

INTERNAL APPRAISAL

A SWOT analysis helps organizations gather important perspectives on how it is performing. SWOTs also help leaders think about external forces and trends outside of the organization’s control that can affect its work in positive and negative ways. SCCF staff, board members, and

¹⁰ Ibid

¹¹ Ibid

¹² Ibid

¹³ Rockefeller Philanthropy Advisors, <https://www.rockpa.org/wp-content/uploads/2022/04/Operating-Archetypes-Philanthropys-New-Analytical-Tool-for-Strategic-Clarity-2.pdf>

¹⁴ Ibid

¹⁵ Ibid

¹⁶ Ibid

stakeholders considered a SWOT assessment and deliberated on what is working and what affected its ability to address the priorities noted in its previous strategic plan.

Strengths (Internal)

Strengths refer to the organization's internal strengths and factors that are within its control. Following is a list of organizational strengths that can continue to be leveraged for organizational effectiveness and community impact.

- SCCF's 10 years of operational and programming experience
- Gained trust with fund stakeholders
- The partnership with VISTA and AmeriCorps and the role of VISTAs as connectors/ambassadors
- Meeting at the table of others
- Creating safe/welcoming space for community and stakeholder conversations
- Support from the DataLab
- University research support/the community stakeholder focus group report
- An experienced director
- Successful fundraising events
- An engaged, committed board
- Financial strength with the endowment
- Continued engagement of former board members
- Improved communications efforts including an improved newsletter, organizational branding
- Access to partner resources (CNP, University of the South)

Weaknesses (Internal)

Weaknesses concern the internal factors that obstruct the organization's ability to meet its goals. Following are organizational and programmatic issues that need to be addressed in both strategic and operational planning in order for the organization to continue to fulfill its mission and advance its vision.

- A high need region and small staff and volunteer base
- Lack of organizational clarity with regard to issues like collective impact and the organization's broader community impact role
- Measurable goals with regard to organizational effectiveness and community impact
- Lack of a consistent community feedback loop
- A relatively small and aging donor base
- Organizational capacity due to small staff and no administrative assistance
- Great ideas exceed the organization's resources (time and money)
- Small volunteer base and great need for volunteer support

Opportunities (External)

Opportunities note external factors outside of the organization's control that can be leveraged to improve issues/conditions related to the organization's operational context.

- There are new people moving into the region. County development initiatives (tiny house) and regional tourist exposure are bringing new community members.
- Social media platforms can be leveraged to support communication efforts, data analytics.

Threats (External)

Threats are also external factors—specifically factors beyond the organization's control that pose a risk to the community or the institution.

- A national and regional economic downturn
- Increasing competition for donors (there are new organizations competing for donors)
- Infiniti plant closing

Strengths to Elevate

Grantee collaboration
Capacity building for partners and area nonprofits

Weaknesses to Prioritize

Inadequate staffing
Growth of annual fund
Fundraising and development
Integrated communications

Situation Analysis

The South Cumberland Community Fund is a vital resource to the tri-county region. In its first 10 years, the organization has proven to be adaptive—particularly resilient during the past two years dealing with the COVID-19 pandemic and regional economic challenges. The organization has a clear vision, mission, and set of values, as well as strengths that can be elevated further over the next few years. Of note is its strong network of grantees and partners that have helped to create a social supports ecosystem capable of fostering a degree of

collective action among actors across the South Cumberland Plateau.¹⁷ With its endowment, a committed staff and board, and a strong track record of impactful grantmaking, SCCF can direct efforts to attract increased funding from regional and national organizations looking to invest in promising rural communities.

This does not mean the organization is without challenges that need attention now and in the near future. Despite having an experienced and skillful director and director of community development, the organization's leanness in staffing limits the expertise and operational capacity it can pull on to support its work. Small donor and volunteer bases limit fundraising and place a strain on existing contributors who are generous with money and time. There is a need to build additional connections and expand the organization's network to gain increased access to "outside" resources. In addition to recruiting new volunteers, there is also a need to better tap into volunteers' expertise to increase the organization's knowledge base. Communications remains a challenge for the fund. Board members and fund stakeholders identified a lack of awareness about SCCF's work in the region as well as a lack of awareness about existing resources that community members can leverage to address current needs. Partners are in need of additional tools to take advantage of opportunities to evaluate their work; this coupled with people experiencing "data annoyance" makes collecting and analyzing data a challenge. Addressing these issues will require innovative thinking and solution-finding.

Strategic Priorities Reflection

Leaders reviewed the strategic priorities of the last plan noting accomplishments as well as areas that still need to be addressed in this current planning effort. To follow is a summarized review of the priorities reflection that took place during the fall 2022 retreats.

1. Engage the Community

Develop relationships with diverse community stakeholders and create a shared vision of success for collective impact on the South Cumberland Plateau.

Notes

- Progress has been made with regard to developing a plan for shared strategies between SCCF and the University of the South's Office of Civic Engagement (OCE).
- SCCF and OCE agreed to meet twice a year to address coordination and professional development issues and opportunities.

¹⁷ Collective action is a collaborative or cooperative action performed by a group of people, governed by self-interest, aimed at achieving a common vision. <https://www.igi-global.com/dictionary/mobilization/4470>

- Efforts have been made to share information about SCCF’s priorities and work to key stakeholder groups. Collaboration between fund committees has enabled the sharing of content (narratives, statistics, data, etc.) in order to share important SCCF news (events, grant announcements, etc.). This is an ongoing effort.
- SCCF is a successful convener of partners and community leaders. There is an opportunity to continue to leverage its role as a convener around important regional topics.
- The fund’s community conversations (2019 and 2022), surveys and focus groups have —and will continue to—contribute to shaping the fund’s grantmaking priorities.

There is a need to continue working on the fund’s business outreach initiative. Allies (individuals and organizations) must be identified, new relationships need to be curated.

2. Seek Measurable Impact

Establish a strategic framework to measure progress in achieving long-term and sustainable outcomes in focus areas that impact the quality of life in our community.

Notes

- The SCCF team was able to define the model and timeline for board-directed grants. In 2019, the Grundy County Area Arts Council received a board-directed grant for JamKids and during the COVID crisis, EMS received a board-approved emergency grant for PPE.

There is a need to increase the organization’s (and grantees’) knowledge and practice around evaluation principles and practices. There is a lack of understanding around concepts such as “collective impact” and how best to measure impact. Further, what does that concept mean for our region given its assets, capacities, and challenges? Support is needed to deepen understanding of the best ways to evaluate the effectiveness of philanthropic grantmaking which will enable the organization to identify its desired outcomes and how to go about measuring them.

3. Sustain our Effort

Increase and diversify financial support to sustain our work now and for generations to come.

Notes

The fund has made significant strides in developing and implementing consistent and effective fundraising and donor cultivation and management practices. The staff and board successfully developed annual giving and endowment campaigns which have enabled the fund to reach its fundraising goals, including its \$1 million endowment mark.

4. Increase Awareness

Communicate effectively with diverse constituencies to increase awareness of and support for SCCF's mission.

Notes

SCCF has worked to increase awareness of the organization and its accomplishments by presenting and speaking at local community events, providing stakeholders and community members with updated information on organizational progress and milestones. SCCF progress is shared on social media and its various communications channels (Facebook, newsletter, the website, etc.). An annual communications calendar was created to support awareness-building efforts. Progress was also made with the development of the fund's branding guide which is helping to ensure consistent use of SCCF brand guidelines. A list and calendar of key communications needs was created. The organization also hired two contractors to assist with communications efforts.

5. Build Organizational Capacity

Build SCCF's capacity as we grow to achieve excellence in leadership, administration, and operations in carrying out our mission.

Notes

Over the last two years SCCF spent time addressing its operational structure and processes. To successfully streamline board operations, leaders reviewed and revised board operations protocols and practices, addressed the fund's organizational chart, and worked to define the scope, responsibilities, and policies of board committees. The fund still has to address fundamental operational issues like organizational capacity with regard to staffing, money, and time.

EXTERNAL APPRAISAL

Although the South Cumberland Community Fund serves a tri-county region encompassing Franklin, Grundy, and Marion counties, the external environment appraisal centers on Grundy County. Of the three counties, Grundy is identified by the Appalachian Regional Commission’s (ARC) index of county economic status as distressed. It is one of nine distressed counties in Tennessee factoring in the county’s three-year average unemployment rate, per capita market income, and its poverty rate.¹⁸ The following data underscore the region’s challenges.

| GRUNDY COUNTY—General Profile (source U.S. Census Bureau) |
|--|
| Population 13,622 (as of 7/1/21) |
| Persons under 18 years 21.3% |
| Persons 65 years and over 20.6% |
| White alone 96.3% |
| Black or African American alone 0.9% |
| Hispanic or Latino 1.6% |
| American Indian and Alaska Native alone 0.7% |
| Asian alone 0.6% |
| Housing units 6,213 (as of 7/1/21) |
| Owner-occupied housing unit rate 2016-2020 78.6% |
| Median gross rent, 2016-2020 \$642 |
| Median household income \$43,116 |
| Per capita income in the past 12 months, 2016-2020 \$20,702 |
| Persons in poverty percent 18.2% |
| Bachelor's degree or higher 13.4% |
| Total employer establishments 157 (2020) |
| Average weekly wage \$599 (U.S./\$831, state/\$1,060) |
| Labor force participation 53.9% |

¹⁸ Tennessee.gov, <https://www.tn.gov/transparenttn/state-financial-overview/open-ecd/openecd/tneecd-performance-metrics/openecd-long-term-objectives-quick-stats/distressed-counties.html>

According to the Federal Reserve, the county’s unemployment rate as of August 2022 was 4.3%.

U.S. News and World Report’s (USNWR) population health category assesses access to care, healthy behaviors, health conditions, mental health, and resulting health outcomes within communities. The life expectancy rate of Grundy County residents is 72.1 years, five years lower than the national average.¹⁹ A high percentage of residents report having no health insurance and being in poor or fair general health. Nearly 40 percent report having no time for physical leisure activity. There is limited access to health care in the county.²⁰

The County Health Rankings are based on a model of community health that emphasizes the many factors that influence how long and how well we live. The rankings use more than 30 measures that help communities understand how healthy their residents are today (health outcomes) and what will impact their health in the future (health factors). Grundy is ranked among the least healthy counties in Tennessee (lowest 0%-25%).

| GRUNDY COUNTY—Population Health |
|--|
| 14.2% of the population has no health insurance (national median, 11.0%) |
| 72.1 years, life expectancy (national median 77.5) |
| Hospital bed availability 0.0 in the county |
| Primary care doctor availability 0.88 |
| Adults with no leisure-time physical activity 37% |
| Adults in poor or fair general health 28% |
| Babies born with low birth rate 10.5%, child mortality county value 110 (number of deaths among residents under age 18 per 100,000 population) |
| Teen birth rate/1K 45.8 |
| Adult smoking, 28% |
| 6.2 average number of mental health days/21% frequent mental distress |

¹⁹ U.S. News and World Report, <https://www.usnews.com/news/healthiest-communities/tennessee/grundy-county#education>

²⁰ https://www.countyhealthrankings.org/sites/default/files/media/document/CHR2022_TN_0.pdf

USNWR’s education category examines the strength of a community's education system and the education level of its residents through measures of participation, infrastructure, and achievement. Grundy County has a high, high school graduation rate but—in comparison to the national average—a low percentage of population with advanced degrees.²¹ K-12 per pupil expenditures lag below the state level, as does pre-school enrollment. Only 23 percent of elementary students tested at or above proficiency in reading and only 27 percent at or above proficient in math. Only 31 percent of county high school students tested at or above proficient in reading.

| GRUNDY COUNTY—Education |
|---|
| High school graduation rate 92.0% (national median 89.4%) |
| Population with advanced degree 20.3% (national median 30.6%) |
| Per-pupil expenditures 10,033 (state/11,091) |
| Children meeting standards in grade 4 reading 17% (state/34.3%) |
| Pre-school enrollment 35.8% (state/39.%, U.S./42.5%) |
| 23% of elementary students tested at or above the proficient level for reading |
| 27% of elementary students tested at or above the proficient level for math |
| 31% of high school students tested at or above the proficient level for reading |
| 13% of high school students tested at or above that level for math |

USNWR’s **housing** category tracks the availability, affordability, and quality of homes within a community. Although the eviction rate in Grundy County is low, more than 20 percent of households report spending at least 30 percent of their income on housing and 52.1 work hours are needed to pay for affordable housing.

| GRUNDY COUNTY—Housing |
|---|
| Households spending at least 30% of income on housing 21.4% (state/26.1%) |
| Work hours needed to pay for affordable housing 52.1 (state/36.2) |
| Eviction rate 1% (state/2.1%) |
| Affordable housing shortfall -64.7 (state/69.3) |
| Overcrowded households 2.5% (state/1.8%) |

²¹ U.S. News and World Report, <https://www.usnews.com/news/healthiest-communities/tennessee/grundy-county#education>

USNWR's food and nutrition category tracks the availability and use of healthy foods in a community, as well as the prevalence of chronic diseases that have been linked to poor nutrition. The county reports a high rate of residents dealing with obesity and diabetes. Only 7 percent of county residents do not have access to a large grocery store.

| GRUNDY COUNTY—Food & Nutrition |
|---|
| Food environment index score 26.67 (state/12.79) |
| Local food outlets/100k 7.5 |
| Population without access to large grocery store 7% (state/27.2%) |
| Diabetes prevalence 12.6% (state/11.9%) |
| Obesity prevalence 37.6% (state/36.2%) |

USNWR's environment category assesses the health of a community's natural surroundings by including measures of air and water quality, access to parks and natural amenities, and environmental risks. The county area with a tree canopy is markedly higher than the state's. The county and state's airborne cancer risks are 28.37 and 34.57 respectively.

| GRUNDY COUNTY—Environment |
|--|
| Drinking water violation rate 0.02/1K (national median: 0.03/1K) |
| Airborne cancer risk 28.37 (state/34.57) |
| Air quality hazard 0.39 (state/0.48) |
| Area with tree canopy 66.1% (state/33.7%) |
| Population within 0.5 mile of a park 14% (state/25%) |

USNWR's community vitality category assesses the stability and social cohesion of a community through measures of population growth, voter participation and more. The county has a high municipal funding imbalance compared to the average state level.

| GRUNDY COUNTY—Community Vitality |
|---|
| Municipal funding imbalance 757.8 (state 111.9) (gap between local government revenues and expenditures. Higher value means a higher shortfall) |
| Net migration rate 6.8% (state/2.7%) (people moving into/out of the community) |
| Census self-response rate 63.7% (state/60.9%) |
| Voter participation rate 56.3% (state/60.8%) |

USNWR’s infrastructure category gauges how well residents can make use of their community, and includes measures of salability, commute time, and internet access. Although lower than the state’s, more than 90 percent of the county population has access to broadband. Public transportation is an issue for the county, as is a high percentage of the population that has to commute more than an hour to get to work.

| GRUNDY COUNTY—Infrastructure | |
|---|---------------------|
| Population with access to broadband | 92.1% (state/96.6%) |
| Population within 0.5 mile of walkable destinations | 13.8% (state/29.7%) |
| Walkability index score | 4.7 (state/7.1) |
| Distance to public transit | N/A |
| Households with no vehicle | 6.4% (state/5.5%) |
| Workers commuting 60 minutes or more | 10.4% (state/6.7%) |

While the challenges of the county are significant, there are county assets that also shape the environment in which SCCF works. The *Report on Existing Community Strengths, Challenges, and Ideas* notes the region’s many promising attributes and assets. The following list of assets is categorized by the social determinants of health framework.²²

²² “Social determinants of health (SDOH) are the conditions in the environments where people are born, live, learn, work, play, worship, and age that affect a wide range of health, functioning, and quality-of-life outcomes and risks.” U.S. Department of Health and Human Services, Office of Disease Prevention and Health Promotion

South Cumberland Assets²³

| |
|--|
| <p><i>Economic Stability — People’s ability to have a steady income</i></p> <ul style="list-style-type: none">• Increase in tourism (economic engine) |
| <p><i>Social and Community Context — People’s relationships and interactions with family, friends, co-workers, and community members</i></p> <ul style="list-style-type: none">• Community connection, social supports (facilitated by Folks at Home)• Arts Inside• Gruetli Senior Center• Heritage Center• Historical Society• Opportunity to get to know agency staff (general comment)• Increasing diversity (present and historical) |
| <p><i>Education Access and Quality — Quality educational opportunities that enable children to do well in school</i></p> <ul style="list-style-type: none">• Musical instruments• Summer meal program• LEAPs after school program• Theater space improvements• Revised teacher room/library at Coalmont• Garden program• High school renovations• Hotspots• School landscaping• Outdoor learning area• Chairs• Social marketing signs/bullying• Sequatchie Valley Head Start |
| <p><i>Neighborhood and Built Environment — Safe and healthy neighborhoods</i></p> <ul style="list-style-type: none">• Tracy City Park• Mountain Goal Trail• Mountain T.O.P. (home maintenance, summer camps, literacy work)• South Cumberland State Park (new playgrounds, campgrounds)• Volunteer Fire Department• New streetlights• Repairs to older homes |
| <p><i>Healthcare Access and Quality — Access to high quality, comprehensive health care services</i></p> <ul style="list-style-type: none">• Though we are in the lowest quartile in health outcomes, we have gone from 95 to 92 in the state (county rankings).• Beersheba Health Clinic• Mobile health unit |

²³ Harbour Workshop notes from the *Report on Existing Community Strengths, Challenges, and Ideas*

Quality of Life — General wellbeing and life satisfaction

Individual Level — physical and mental health perceptions (e.g., energy level, mood)

Community Level — community-level resources, conditions, policies, and practices that influence a population's health perceptions and functional status

- Food Bank in Tracy
- Isaiah House (emergency housing for children removed from homes)
- Marion Animal Rescue Connection
- Summer meals program
- School weekend food program
- Sleeping under the peace (builds beds for children)
- VISTA
- Clothing bank
- Youth opportunities—movie nights, Tracy City Park
- SETHRA transportation system

South Cumberland Challenges

"We have a virtuous cycle that can be used to address all these challenges."

SCCF board member reflection

During the SCCF reflection retreat, board members and fund stakeholder and partner representatives reviewed the Grundy County data and identified critical challenges, shared insights on data interpretation for the region, and noted development opportunities facing the Plateau. The challenges and insights are also framed in the social determinants of health categories.

Economic Stability — People's ability to have a steady income

- An entrepreneurial incubator is a concept worth exploring.
- Training is needed for carpenters, plumbers.
- The area has a dearth of employers.
- There is a need to increase broadband access.
- There is a need to support area tourism.
- There is a shortage of people able to do building repair.

Social and Community Context — People's relationships and interactions with family, friends, co-workers, and community members

- There is an appetite for development of non-profits.
- Communication by word of mouth might impact interest in health food, walking, etc.
- There is a general lack of volunteers for local non-profits.
- There is a general lack of collaboration and coordination across agencies.
- There is a lack of awareness of community resources that do exist.
- A "household" in Grundy is often more than one family. This impacts the data.
- Need for more community resources to support communication efforts.

Education Access and Quality — Quality educational opportunities that enable children to do well in school

- Addressing reading levels could have a real impact (job training, college attendance, prison stats, etc.).
- Multiple programs exist, can we convene to have greater impact?
- The high poverty rate and low education rates are related. Continued low education leads to continued high poverty.
- There is a disconnect between the high, high school graduation rate and the rate of employment, advance degree attainment, etc.
- There is a cultural fear of "youth flight" which may be related to the issue of advanced degree attainment.
- Students are graduating without strong academic skills to be successful in college.
- Improving academic success is an imperative.
- There's no local option for public higher education.

Neighborhood and Built Environment — Safe and healthy neighborhoods

- Do we have a rural "hidden homeless" issue, noting the reported 2.5% of overcrowded households?
- Do we have 2-income households with multiple families living in the same home?
- There is a need for safe, permanent housing.
- There is a need to improve transportation on the Plateau (this is linked to other issues, healthy food sources, jobs, medical access, etc.)
- There is a systemic issue with public transportation. (SCCF funded vans for three organizations for transportation.)
- There are likely fewer cars per household (and more than one family per household).
- Parks are an asset but the distance to parks and lack of transportation limit access to the asset.

Healthcare Access and Quality — Access to high quality, comprehensive health care services

- There is a tremendous need to try to respond to the lack of access to health care (primary care, urgent care, and care for the uninsured).
- Better primary care would help improve healthcare overall.
- Lack of mobility contributes to poor health outcomes.
- The lack of primary care, high teen births, more adults in poor health contributes to lower life expectancy.

Quality of Life — General wellbeing and life satisfaction

- The lack of physical activity.

COMMUNITY IMPACT PRIORITIES 2023-2026

The Plateau is a place of hope and prosperity for all its residents and communities.

SCCF Vision Statement

Community Vision

During the planning retreat, SCCF staff and board members spent time imagining what the Plateau would actually look like once their vision is realized. Pictures of the region were drawn to illustrate a place where:

- The Plateau's economy is bolstered by a strong job market as local industry and businesses thrive from leveraging the region's many assets (pristine natural resources, Appalachian arts, food music and culture) and from investments that fostered innovative business models tailored to rurality.
- Everyone is housed. There is ample affordable, quality housing with a mix of housing stocks to meet the needs of Plateau residents.
- The K-12 education system is a quality system that ensures children graduate and are prepared for a range of employment and educational pathways.
- Post-secondary educational opportunities are abundant leveraging relationships with the University of the South, regional community colleges, and technology that provides access to virtual education and training from national and global providers.
- A strong ecosystem of social service and community-based organizations provides residents with comprehensive services to foster enhanced quality of life and meet their range of needs.
- A community center provides a range of services in support of K-12 education, day care, recreation, adult education, maker spaces, as well as health and workforce development services.
- There is a model transportation system in the region, one adapted to the specific needs of the Plateau.
- There are ample, accessible recreation choices leveraging the area's natural resources as well as venues for community gathering and entertainment (public theatre, bowling, etc.).
- Innovative sustainability and green energy initiatives serve as drivers of economic and workforce development as well as regional stewardship.

Strategic Direction

To get from the current state of the Plateau to the desired future state, the plan delineates a shift in the organization's grantmaking approach. While the fund will continue to support basic community needs in the domains of education, community and economic development, and health—in line with the Sower archetype—it seeks to foster greater impact in these areas by strategically investing in efforts designed to move the needle on identified challenges and produce transformative outcomes. The fund's capacity-building and convening efforts will also

be focused on identifying opportunities to advance impact in the targeted issue areas. The plan identifies grantmaking goals for the next three years.

In considering SCCF's bold vision for the future leaders imagined, what if...

- There were places for young and old to gather together and learn and share?
- There were sweat equity involved in housing?
- SCCF could hold a large symposium on transportation?
- The mountain became a top place to visit in the state?
- There was a contemporary and traditional craft co-op?
- There were lots of different ways to earn a living wage to prosper?
- There was a center for entrepreneurship?
- We could get more doctors and medical specialists in the community?
- The youth saw this as a place to stay rather than a place to leave?
- There was space for everyone's idea for flourishing?
- SCCF hosted a convening of ideas?

EDUCATION

The Challenge

Access to—and attainment of—high quality education is inextricably linked to a person's overall well-being. According to the U.S. Department of Health and Human Services,

"People with higher levels of education are more likely to be healthier and live longer. ... Children from low-income families ... are more likely to struggle with math and reading. They're also less likely to graduate from high school or go to college. This means they're less likely to get safe, high-paying jobs. ... [Further] the stress of living in poverty can also affect children's brain development, making it harder for them to do well in school. Interventions to help children and adolescents do well in school ... can have long-term benefits" for health and well-being.²⁴

In a report on education and children's family characteristics, the U.S. Department of Education also noted that risk factors, such as living in a household experiencing poverty, are "associated with poor educational outcomes—including receiving low achievement scores."²⁵

²⁴ U.S. Department of Health and Human Services, <https://health.gov/healthypeople/objectives-and-data/browse-objectives/education-access-and-quality>

²⁵ National Center for Education Statistics, <https://nces.ed.gov/programs/coe/indicator/cce/family-characteristics>

Grundy County still lags behind others in the state with regard to educational attainment and achievement. Only 23 percent of elementary school students (3rd to 8th grade) test at or above proficiency in reading. According to the Tennessee Department of Health, “One-in-six children who are not reading at grade-level proficiency by 3rd grade will not graduate from high school.”²⁶ Only 24 percent of students (3rd to 8th grade) test at or above proficient in math. The achievement lag drags into high school with only 31 percent of county high school students testing at or above proficient in reading. While the county has a high school graduation rate of 92 percent, in comparison to the national average, it has a low percentage of population with advanced degrees (20.3 percent versus 30.6 percent).

In its efforts to boost academic performance, the State Board of Education passed academic program requirements that call for retention of students who are not performing at grade-level standards.²⁷ This could mean that county third graders who score less than proficient “on the English language arts section of the TCAP exam could be held back.”²⁸ Improving students’ performance in reading and math has become an imperative for the state and for local school systems.

Shifts Needed

Current State—Only 23 percent of Grundy County 3rd graders read at grade level.

Future State—50 percent of students are reading at or above the state and national levels for reading proficiency by 3rd grade.

²⁶ Tennessee Department of Health, <https://www.tn.gov/health/health-program-areas/tennessee-vital-signs/redirect-tennessee-vital-signs/vital-signs-actions/3rd-grade-reading-level.html>

²⁷ RULES OF THE STATE BOARD OF EDUCATION—ACADEMIC AND INSTRUCTIONAL REQUIREMENTS

“Schools shall identify students who demonstrate difficulty in achieving the requirements for promotion to the next grade level and therefore may be at risk for retention by February 1. ... Schools shall notify the parent or guardian of any student who is identified as at risk for retention within fifteen (15) calendar days of identification.

Factors used to identify students who are at risk for retention shall, at a minimum, include:

- (a) The student’s ability to perform at the expectations of the current grade-level standards;
- (b) The results of local assessments, screening, or monitoring tools;
- (c) State assessments, as applicable”

<https://www.tn.gov/content/dam/tn/stateboardofeducation/documents/2022-sbe-meetings/july-22%2c-2022-sbe-meeting/7-22-22%20III%20I%20Academic%20Instructional%20Req%20Rule%200520-01-03-.03%20and%20-.16%20Clean.pdf>

²⁸ WPLN, <https://wpln.org/post/tennessee-lawmakers-have-some-regrets-about-rushing-a-new-law-holding-back-3rd-graders-who-struggle-to-read/>

Success Stakeholders—Head Start, B45, Save the Children, CORE State, the local school systems, families and caregivers, libraries, Communities in Schools, day care centers, local churches, Discover Together

Strategy #1—Reading and Literacy Development

Improve children’s educational achievement and attainment over the next three years by increasing the fund’s investments in reading readiness and literacy development, and efforts aimed at increasing 3rd grade reading proficiency levels.

Grantmaking Goals/General

This strategy places an emphasis on grantmaking directed toward collaborative initiatives that aim to:

- 1) Foster children’s early literacy capacities and children’s reading readiness / children birth to age 5 (including family, school, and community engagement initiatives). (medium term)
- 2) Increase family awareness about the importance of early literary and grade-level proficiency (including family, school, and community engagement initiatives). (short to medium term)
- 3) Create literacy-rich environments for children in homes, schools, and community spaces. (short to medium term)
- 4) Offer innovative solutions to close the reading proficiency gaps of area students. (medium to long term)

Capacity Building Goals

The fund will prioritize investments in initiatives and programs that aim to:

- 1) Improve the quality of early literacy programs offered in pre-school and early education environments. (medium term)
- 2) Equip family members and caregivers with the knowledge and skills to support children’s early literacy and reading development. (short to medium term)
- 3) Support the professional development of early childhood and elementary school educators. (short to medium term)

Impact

SCCF’s aim is to achieve the following outcomes and impact.

Early Literacy/Reading Readiness

Outputs—Increase the number of children benefiting from early literacy and reading readiness programs; increase in the number of early literacy programs available to children in the region

Outcome—Improvements in children’s reading readiness indicators (language and early literacy development)

Impact—Children reading at or above grade level by 3rd grade

Family Awareness and Capacity

Outputs—Increase in the number of family and community engagement programs offered that focus on early literacy/reading readiness; number of family/caregivers that participate in family engagement programs

Outcome—Improvements in children’s readiness indicators

Impact—Children reading at or above grade level by 3rd grade

Literacy-rich Environments

Outputs—Increase in access to literacy resources (books, spaces) available to the region’s children and families

Outcome—Improvements in children’s readiness indicators

Impact—Children reading at or above grade level by 3rd grade

Capacity Building

Outputs—Number of family, educator, and community members participating in local early literacy and reading programs

Outcome—Greater family and caregiver capacity to support children’s early literacy and reading development

Impact—Children reading at or above grade level by 3rd grade

COMMUNITY AND ECONOMIC DEVELOPMENT

The Challenge

Data from the U.S. Census Bureau provides an incomplete picture of the housing situation on the Plateau. As noted in the external analysis section of the plan, in Grundy County:

- Households that spend at least 30% of income on housing is 21.4%
- Housing units 6,213 (as of 7/1/21)
- Median gross rent, 2016-2020 \$642
- Work hours needed to pay for affordable housing 52.1 (state/36.2)
- Affordable housing shortfall -64.7 (state/69.3)
- Overcrowded households 2.5% (state/1.8%)

During the SCCF's reflection and planning retreats, the fund's leaders raised the following questions with regard to the reported data and the day-to-day living conditions observed in the region.

- Noting the reported 2.5% of overcrowded households, Do we have a rural "hidden homeless" issue?
- Do we have two-income households with multiple families living in the same home?

A 2021 *Community Strengths and Needs Assessment* study commissioned by Mountain T.O.P., a nonprofit housing organization, offers a more nuanced picture of the region's housing needs. While the report spotlights the area's strengths, people, nature, lifestyle, commerce, and location, it found that there are significant roadblocks to navigate with regard to addressing the area's housing needs.

- There are "major barriers to accessing developing land." Tourism and entertainment have been the priorities for land development in the region.
- There is a "large tiny home community being developed, but not for low-income residents. More than 100 tiny homes have developed in recent years."
- There are "no low- to middle-income single-family homes available."
- Of the more than 6,000 housing units in the county, mobile homes comprise 22 percent of them. Mobile homes equate to "low equity and depreciating generational wealth."
- "There are big vacancies due to tourist housing and vacation homes."
- "The decline of coal mining" continues to have an adverse impact on the local economy.
- "Grundy County is lacking much needed service providers such as Habitat for Humanity and housing-related community development financial institutions."
- Grundy Housing Authority has 110 low-income units and at the time the study was issued, 54 people on its waiting list.
- A significant portion of the county's housing stock was built between 1970 and 2000 with nearly a third having been built before 1950 up to 1969.²⁹

Mountain T.O.P.'s overriding finding was that

"Grundy County residents would benefit from at least 660 more housing units. Wait lists are long, housing stock is old, and home maintenance is cumbersome. Through an integrated network of partners, we can diversify the housing and workforce ecosystems in the county to counter negative impacts of housing need. We have found that a local, healthy housing ecosystem is possible; yet it will not occur without significant collaboration among a diverse array of local and regional service providers, a balance between development and rehabilitation, a recognition of land development issues, a

²⁹ Mountain T.O.P. Strengths and Needs Assessment, 2021

focus of family financial health and, and fruitful conversation with state and federal level programs.”³⁰

According to the National Low Income Housing Coalition,

“Housing is the key to reducing intergenerational poverty and increasing economic mobility. Research shows that increasing access to affordable housing is the most cost-effective strategy for reducing childhood poverty and increasing economic mobility in the United States. ... Increasing access to affordable housing bolsters economic growth. Research shows that the shortage of affordable housing costs the American economy about \$2 trillion a year in lower wages and productivity. Without affordable housing, families have constrained opportunities to increase earnings, causing slower GDP growth. ... [E]ach dollar invested in affordable housing boosts local economies by leveraging public and private resources to generate income—including resident earnings and additional local tax revenue—and supports job creation and retention.”³¹

There is a need for the fund to support efforts that improve the Plateau's housing ecosystem.

Shifts Needed

Current State—There is a lack of quality, affordable housing on the Plateau. Many area families live in overcrowded, poor quality, sub-standard housing conditions.

Future State—All people living on the Plateau have access to quality, affordable housing.

Success Stakeholders—SETHRA, Little Partin Center, Mountain T.O.P., Chattanooga Homeless Coalition, CAC/Churches, and other social service-focused nonprofits, local/county governments

Strategy #2—Housing Ecosystem

Improve the region’s housing ecosystem by increasing the fund’s investments targeted to closing housing system gaps.

Grantmaking Goals/General

This strategy places an emphasis on grantmaking directed toward collaborative endeavors that aim to:

³⁰ Ibid

³¹ National Low Income Housing Coalition, <https://nlihc.org/explore-issues/why-we-care/problem>

- 1) Provide support for emergency housing on the Plateau. (short-term)
- 2) Sustainably improve family financial health. (medium to long-term)
- 3) Increase the affordable housing stock available in the region. (long-term)
- 4) Increase multi-sector, social service collaboration for people experiencing housing stability issues. (short-term and ongoing)
- 5) Offer innovative solutions to markedly improve the region's housing system.

Capacity Building Goals

The fund will prioritize making investments in initiatives and programs that aim to:

- 1) Strengthen the knowledge and programming skills of area organizations that provide housing, housing-related services. (medium-term)
- 2) Support the networking and peer learning of local agencies—enabling connections with other rural housing programs and initiatives through virtual and in-person convenings. (short-term)
- 3) Increase regional knowledge about effective affordable housing solutions for rural communities. (medium-term)

Impact

SCCF's aim is to achieve the following outcomes and impact.

Emergency Housing

Output—Increase in the number of people who are able to receive emergency shelter services

Outcome—Increase in number of emergency shelter units on the Plateau

Impact—Safety net of quality emergency shelter services established on the Plateau with links to appropriate social services

Financial Health

Output—Increase in number of people served by financial education, financial improvement services

Outcome—Increase in number of families experiencing financial stability, increase in number of financial support services available to families on the Plateau

Impact—Percentage of poverty reduction on the Plateau

Affordable Housing

Output—Increase in the number of affordable housing units

Outcome—Increase in range of affordable housing (rent and owned) options available on the Plateau

Impact—Poverty rate reduction on the Plateau, increased percentage of home ownership on the Plateau

Capacity Building

Output—Number of capacity building grants given, number of organizations participating in capacity building programming, number of capacity building programs hosted—or supported by the fund

Outcomes—Stronger network of housing-related organizations, increased funding for area housing initiatives

Impact—A bonafide Plateau housing ecosystem

COMMUNITY IMPACT

The Challenge

The Rural Health Information Hub notes that rural population and health is dependent on safe and reliable transportation. The hub identifies critical challenges facing rural communities with regard to transportation.

“Rural populations rely on personal vehicles, public transport, and non-emergency medical transport to meet their healthcare needs. The American Public Transportation Association reports medical services as the final destination for nearly 9% of public transit riders in small urban and rural areas. ... Economic stability for many rural residents is dependent on a reliable means of transportation to a place of employment. In a survey of small urban and rural public transit riders, one report found 34% of all public transit trips accounting for work as the primary destination. ... Limited transportation options may prevent rural residents from accessing social services and consumer needs (such as running errands or shopping). In more remote locations, transportation may be essential to ensure civic engagement and other types of engagement in community life.”³²

In the SCCF-commissioned *Report on Existing Community Strengths, Challenges and Ideas*, transportation emerged as an issue of great concern among community residents. Inadequate access to reliable transportation has a significant, negative impact on every aspect of community life. Residents without personal vehicles report having significantly limited access to area grocery stores, health care services, extra curricular educational programs, and area recreational venues.

SETHRA Public Transit is the rural public transportation service of the Southeast Tennessee Human Resource Agency. The service—available across nine counties—was created for the

³² Rural Health Information Hub, <https://www.ruralhealthinfo.org/toolkits/transportation/1/needs-in-rural>

general public. It is a curb to curb service so it does not have a fixed route. People have to make advance reservations to access rides on SETHRA. Area residents report being largely unaware of how to access SETHRA, and find its services more geared to health related trips rather than other types of transportation needs.

Reliable, affordable transportation is needed on the Plateau to address the region's health, education, and economic development needs. There is also a need for more research on transportation dynamics in the region as well as knowledge-building regarding possibilities for addressing rural transportation.

Shifts Needed

Current State—Area residents are largely dependent on personal vehicles for transportation—individuals and families that do not own cars have limited capacity to secure reliable transportation for work, health, food, recreation, and general mobility.

Future State—A comprehensive public transportation system that serves the tri-county region

Success Stakeholders—SETHRA, local, and regional employers, healthcare providers (private sector), local public officials, TDOT, Mountain Goal Trail Alliance

Strategy #3—Transportation

Increase local knowledge and initiative around public transportation improvements by targeting fund investments toward research and experiments over the next three years.

Grantmaking and Capacity Building Goals

This strategy places an emphasis on grantmaking directed toward collaborative endeavors that aim to:

- 1) Explore transportation system improvement options through collaborative research projects. (short term)
- 2) Convene rural transportation stakeholders (from Tennessee and other states) to increase local knowledge acquisition about possible solutions. (short term)
- 3) Support local efforts to form transportation-focused peer learning networks. (medium term)
- 4) Establish pilot initiatives to test innovative solutions. (long term)

Impact

SCCF's aim is to achieve the following outcomes and impact.

Outputs—Number of research and experimental pilots funded, participation/engagement levels in transportation symposia/convenings
Outcome—A comprehensive transportation plan for the region
Impact—Increased access to a variety of transportation services within the tri-county region

OPERATIONAL PRIORITIES 2023-2026

Strategy #1—Engage the Community

Develop relationships with diverse community stakeholders and create a shared vision of success for collective impact on the South Cumberland Plateau.

The Challenge

There is a need to continue working on developing an alliance of critical stakeholders that are able to support the fund and region's various programming, development, and fundraising goals. There is a need to clarify the compelling purpose of the alliance—a dynamic group of business sector and community decision makers who inform, advise and participate in SCCF initiatives. There is a need to also identify SCCF and regional allies (individuals and organizations), curate new relationships (with local and regional public officials)—in essence determine critical partners who make up the alliance.

2022-2024 Goals

- 1) Clarify the alliance's purpose, mission, values and scope of work
- 2) Identify possible alliance members, stakeholders and interest groups and develop a recruitment strategy
- 3) Develop an alliance action plan

Impact

Outputs—Increase in number of collaborative partnerships
Outcomes—Increase in investments in SCCF community development initiatives
Impact—Diverse group of stakeholders actively engaged in SCCF

Strategy #2—Seek Measurable Impact

Establish a strategic framework to measure progress in achieving long-term and sustainable outcomes in focus areas that impact the quality of life in our community.

The Challenge

Measurement of SCCF's operational effectiveness and community impact has been elusive. This is partly due to the broad nature of the fund's grantmaking. Much of its grantmaking over the years has provided needed funding for grantee projects focused on immediate (short-term) organizational needs versus long-term systemic issues such as improving K-3 educational outcomes. There is a need to increase the organization's (and grantees') knowledge about the latest philanthropic evaluation principles and practices as well as concepts such as "collective impact." A deeper understanding of the best ways to evaluate the effectiveness of its grantmaking will enable the organization to identify its desired outcomes and how to go about measuring them.

2023-2025 Goals

- 1) Partner with an evaluation partner to support establishment of the fund's measurement practice. Design an evaluation and measurement practice with protocols to enable the fund to monitor both organizational effectiveness and community impact.
- 2) Refine plan metrics accordingly.
- 3) Invest in staff professional development around measurement and evaluation. Staff training will result in increased knowledge and capacity to set and manage evaluation of goals and longer term outcomes.
- 4) In collaboration with the community, identify indicators/metrics for multi-sector, multi-partner collaborative endeavors around the key strategy issue areas identified in the plan.

Impact

Outputs—Implementation and tracking of established metrics/indicators

Outcomes—Improved grantmaking and capacity building strategies

Strategy #3—Sustain Our Effort

Increase and diversify financial support to sustain our work now and for generations to come.

The Challenge

Expanding the fund's capacity to acquire additional funding from regional and national grantmakers remains a priority. The aim to increase the fund's community impact through collaborative endeavors offers new opportunities to attract funding from regional and national organizations interested in supporting rural development. Organizational capacity is a limiting factor here. There is a need for expanded expertise regarding how best to do this and how this meshes with SCCF's overall strategic goals.

2023-2025 Goals

- 1) Research and expand applications for grants (public and private) that fit our mission.
- 2) Identify grantmaking organizations, including state and federal grants, that meet our profile to potentially increase funding as well as raise the organization's profile within the funding community.
- 3) Explore target organizations to see what grants have been awarded to organizations with a profile similar to SCCF. Compile a target list of potential funders.

Impact

Outputs—Percentage increase in number of donors, Percentage increase in contributions (total and per donor), stewardship plans in place and implemented

Outcomes—Sustainable fund development and fundraising efforts

Strategy #4—Increase Awareness

Communicate effectively with diverse constituencies to increase awareness of—and support for—SCCF's mission.

The Challenge

There is still a need to develop integrated marketing and communications plans for the fund.

2023-2024 Goals

- 1) Develop an integrated marketing/communications plan including all events and campaigns.
- 2) Streamline communications activities for greater effectiveness and efficiency.
- 3) Leverage the partnership with OCE to maximize communications opportunities and efficiencies.
- 4) Determine cost/benefit of procuring additional resources to manage communications.
- 5) Engage in professional development around communications planning and implementation.
- 6) Secure a communications professional to support the design and implementation of a communications plan.

Impact

Outputs—Social media, web and email analytics, number of print and broadcast stories featuring SCCF

Outcomes—Increased awareness of SCCF and its role in regional economic development

Strategy #5—Build Organizational Capacity

Build SCCF’s capacity as we grow to achieve excellence in leadership, administration, and operations in carrying out our mission.

The Challenge

The fund still has to address fundamental operational issues like organizational capacity with regard to staffing, money, and time.

2023-24 Goals

- 1) Evaluate staffing needs to ensure adequate human resources are in place to carry out strategic goals.
- 2) Determine feasibility of creating a volunteer/internship program to fill specific organizational roles.

Impact

Outputs—Staff and board evaluation processes in place, staff roles aligned with strategic priorities

Outcomes—More effectively run organization, stable staffing

FINAL NOTES

The community vision articulated by fund leaders offers direction for grantmaking as well as programmatic ideas for the next few years. The immediate work for the organization is to determine specific next steps in an operations plan, to hone its grantmaking practices, and make plans for convenings that allow for an even more intentional and direct pursuit of its transformation agenda for the Plateau—an agenda that truly leverages its community investments and seeds the most promising approaches and collective action in service of ensuring lasting prosperity for the people and the place.