



WINTER PARK HEALTH FOUNDATION: A SMALL FOUNDATION STAFFS UP TO ACHIEVE BIG GOALS

About Winter Park Health Foundation

- A health conversion foundation, founded in 2000
- Area served: Central Florida communities of Winter Park, Maitland, and Eatonville
- Mission: To make a positive difference in people's lives by creating the healthiest community in the United States
- Number of staff members: 11
- Number of grantees: 43
- Assets: \$135 million
- Focus areas:
 - Community health policy
 - Children & youth
 - Older adults

Winter Park Health Foundation (WPHF) may be small in size relative to other foundations in CEP's data set, but it strives to create a big presence in the communities it serves. "One of the things that I tell my staff is, 'If you look around at other foundations that are our size, you don't see this many program people,'" says Patricia A. Maddox, president and CEO of the Winter Park Health Foundation. "'We do this purposefully and strategically. So you could look at yourself as part of the grantmaking strategy of the Foundation. Because we want you not only to perform the role of the normal program officer or program director, we also want you to be so integrated into the community we serve that you are part of the gift.'"

That deep involvement in the community provides tangible benefits to WPHF's grantees. "It's those connections on the ground, with their help bringing the right people around the table, that enabled us to

make the decisions that were in the best interests of our constituents," says a grantee.

Another grantee describes what happened after the Foundation's communications director reached out to her press contacts to help publicize a WPHF-funded event. "The reporter contacted me, and I gave her additional information. There was an article in the local paper about the grant and about our organization and what we were trying to do. That's the way Winter Park goes beyond the call to assist us," says the grantee.

PROVIDING COMPREHENSIVE ASSISTANCE

One quarter of WPHF grantees received comprehensive assistance. These activities include

- Strategic planning advice
- Development of performance measures
- Encouraged/facilitated collaboration
- Seminars/forums/convenings
- Provision of research or best practices
- Use of foundation facilities
- Communications/marketing/publicity assistance

WPHF provides comprehensive assistance as part of its strategy to make the most of its investments. In doing so, it aims to help grantees bridge any existing gaps between their skills and the goal of the grant. "Sometimes the best of intentions are very difficult to achieve because you just don't have all the pieces of the puzzle," says Maddox. "So, if making the grant work successful requires additional time and expertise from us or others, or thinking about things like strategic planning, we're always willing to have those kinds of conversations with grantees – because the whole point of us doing the work is to help our community."

Along with less formal give and take, the Foundation has structured interactions with its grantees in the form of quarterly reports, which often yield more information than just progress on the grant. "In

addition to there being a piece of paper that goes from the organization to us, in most cases there is also a conversation between our staff person and the staff person at the organization. Very often it is those conversations and the questions that they evoke that lead us to hear something else that the organization might need help with," says Maddox.

IN-HOUSE EXPERTISE

WPHF staff members provide the bulk of the Foundation's assistance activities themselves, with occasional help from third-party providers. That in-house expertise is a result of the Foundation's staffing model, which Maddox says is "very much like a lot of the larger foundations, where you have program staff who are area experts in their field. It is unusual for a foundation of our size to have that level of staffing. But it is a very deliberate strategy to help us have the kind of connection and understanding not only of the work that we do but of the community we serve."

That expertise makes a difference to grantees. For example, a grantee who reports that the Foundation has provided her organization with multiple forms of assistance, including strategic planning advice and the development of performance measures, says, "A Winter Park program officer sat down with us to help with our strategic planning and make sure we had an evaluative

tool to assess whether the project was successful or not. Going over specific evaluation instruments and developing goals and objectives and just establishing a strategic work plan was really helpful," she says. "The process also led us to identify those things that might help us to be more successful."

According to another grantee, "They have good program people at the Winter Park Health Foundation. In many instances they knew more about some of these issues than I did."

While the Foundation provides its grantees with plenty of expertise, Maddox emphasizes that assistance beyond the grant is most effective when it "is coming from a colleague as opposed to the traditional grantmaker-grantee dynamic where the grantee feels like there is some expectation of that relationship. We try very hard to come to our grantees in a more collegial way so that we're working with them as opposed to them trying to please us."

"What makes this foundation ... unique ... is [their staff's] long-term commitment, their openness and willingness to meet, their involving our constituents as well as our staff in the decisionmaking process," says a grantee. "They don't just give us money and say, 'Okay, here's your money, now go do it.' They are there with us. They have a lot of expertise. And the impact is great."

