

National Rural Funders Collaborative
May 6-7, 2003 Meeting Report and Follow-Up Recommendations
Henry A. Wallace Center for Agricultural & Environmental Policy at Winrock International

I. Background and Context

In the letter to their Steering Committee, NRFC states that the May 6-7, 2003 meeting in Washington D.C. was scheduled to “establish strategy-based priorities and begin to form broader alliances with agency representatives key to those priorities...discussions with partner agencies during that event will serve to identify other issues and priorities that learning network partners and agency officials may want to begin to address collaboratively as well.”

The Wallace Center set four objectives for the meeting based on NRFC’s desired outcomes:

1. Obtaining input from grantees, funders, and agency representatives into NRFC’s national rural policy agenda framework.
2. Providing the venue for groups to develop plans for next steps on their specific policy issues.
3. Strengthening linkages between grantees and agency representatives regarding policy issues.
4. Obtaining input from grantees, funders, and agency representatives into the September annual meeting.

Twenty-one participants attended a core part of the NRFC meeting in Rosslyn, VA, either in its entirety or for parts of the afternoon sessions (a final participant list is in Appendix A); others were involved in the agency meetings. Attendees at the agency meetings are listed in Appendix B.

Below is a report of the key outcomes of the meeting divided into those that relate to NRFC’s national policy agenda (section II); and the specific issues with action plans as developed by the groups (section III) including information on the agency meetings. Our recommendations for next steps are included in section IV.

II. National Policy Agenda

The meeting had three components that fed into the expansion of NRFC’s National Policy Agenda. On the first day, the three agency representatives spoke briefly about the “key” concerns of their agencies or organizations. At HHS these are workforce health care access, family self-sufficiency, disabilities, aging, prevention, disparities in health status, and tribal communities. At USDA-CSREES these are community-led development, entrepreneurship, public university engagement, leadership development, youth involvement and integration of programs. At CDFI (Treasury Department) priorities are minority home ownership and distressed communities (rural and Native).

Several guest speakers also added items to the list of key concerns and opportunities. These included the Assets for Independence Act and the Savings for Working Families Act, identified by Brian Dabson of the Corporation for Enterprise Development (CFED), and cluster development and entrepreneurship, identified by Paul Kalomiris of the National Governor’s Association (NGA).

Based on the afternoon’s presentations, the entire group identified a number of ideas and concepts that should inform their work. These were:

- Looking at RD programs for their ability to include leadership/capacity building; bring in CBOs to talk to agencies; retrain agency people to understand rural; increase consultation between rural/HHS
- Rural and tribal community colleges—link with land grants for resources

- Focus on entrepreneurial person versus the institution
- Build policy based on success stories/trends
- Maximize program flexibility – must be written into the regulations
- Look to rural areas as labs for entrepreneurial activity
- Highlight differences between rural and urban
- Distrust of federal agencies taking over rural efforts
- Evaluation of programs—learning from experience
- Quantifying impacts – need information. Yet there are burdens; accountability
- Colleges – incorporate community learning (gives validity to community, passes on experience)
- Tribal communities – no infrastructure (tribal community colleges serve as an alternative to tribal government)

The next morning brought other ideas from the agency staff that Sally Maggard and Dianne McSwain had gathered for meetings with the grantees. After all this input, the group added several items to the national policy issue matrix that includes information gathered through: (1) interviews with grantees and funders; (2) the Santa Fe, NM meeting; and (3) conversation with agency representatives (Dianne/Sally). The matrix follows the NRFC’s framework of wealth creation, leadership, and family and child welfare. The issues to be added to the matrix are:

Wealth Creation

1. Link Earned Income Tax Credit (EITC) and Child Care Tax credits (16 states have legislation)
2. Encourage alternative financial institutions
 - a. Community-based credit unions. Comments made by Alice Veenstra include that the support system is intensive and that credit unions require \$1-4 m capitalization, about 5 years between first plans and first loans, and require \$200,000-300,000 in lawyer fees. On the other hand, loan funds can be started with \$100,000 and can give out the first loan within the first year. Banks have all different scales, start-up costs, etc.
 - b. Capacity building for CDFIs
3. Engage Federal Home Loan and Banking System

Leadership (Entrepreneurship)

1. Identify pots of money for planning grants and encourage learning and skill development, instead of struggling with the “Go forth and collaborate” command
2. Change the relationship with USDA and other federal agencies and CBOs
3. Form angel networks for wealth creation/entrepreneurship (these require resources to get off the ground; takes money to determine the feasibility of whether entrepreneurship and angel networks are appropriate for a place)

Child and Family Welfare

1. Tribal self-sufficiency. Identify new economic models for tribal areas
2. Access to technology
3. Need ideas for health care/small businesses
4. Building on what was heard at HHS meeting from the department that focuses on persons with disabilities. AK could pilot a technology program and see how the service handles extreme conditions.

The complete matrix with these new national policy issues included can be found in Appendix C.

III. Specific Issues of the Learning Groups

A. Review of work through May

On the afternoon of May 6th, Kate Clancy reviewed where the groups were following the New Mexico meeting in January and discussions between then and now. In the area of leadership/entrepreneurship, the issues identified in January were: (1) categorical programs do not address entrepreneurship; (2) somebody needs to capture some of the existing innovations and models; and (3) continuing education for agency staff in entrepreneurship would be helpful. Ideas proposed for a strategy at the meeting were to (a) re-engage the Rural Caucus; (b) map out congressional delegates and match them with states; (c) map out allies in agencies and other partners; (d) capture successes; and (e) build alliances with other networks.

The HHS work that had focused on transportation in New Mexico moved to a focus on health care access between January and May. The issues include: (1) the Clinical Lab Improvement Act with regard to which HHS just made movements to address the specific rural concerns identified by the group; and (2) the Indian Healthcare Improvement Act (ICHIA) which is due for reauthorization. IHCIA allows tribes to provide health care beyond the basics and allows a health aide program only in Alaska, where aides do primary care. The groups would like to extend this program to all tribes because many natives in the lower 48 do not live on large reservations. The aide program could provide care for the small communities in which most of them live.

The third issue determined important at the New Mexico meeting was Individual Development Accounts (IDAs). The specific targets for this issue are: (1) expanding IDA eligibility, (2) changing match criteria, loss of eligibility for other programs, and (3) increasing administration allowable.

Because the agency meetings on the morning of May 7th played such a large role in the action plans that came out of these specific groups, we have included information about those meetings here. In two cases (IDA and entrepreneurship) we have provided detailed information from those meetings because NRFC staff was not present. We have provided some information from the HHS meeting that should be complemented with Jim Richardson's notes.

On the afternoon of May 7th, each of the groups developed an objective and related activity steps for a short-term (e.g., one year) timeframe based on their discussions the previous day and at the agencies.

B. Entrepreneurship/USDA meeting

Many useful introductions were made at this gathering. In the first section of the meeting, Deb Markley and Brian Dabson provided some context/conclusions about entrepreneurs and the entrepreneurship community at the national level (i.e., what is happening in entrepreneurship across the country and what are the main issues).

June Holley gave a power point presentation on AceNet and the organization's activities. But more importantly she explained many of the barriers AceNet is facing as they go about their work (for example, using Rural Business Enterprise Grants (RBEG) money for the kinds of work they want to do – facilitating a cluster instead of working with just one business). She stated that there is a real need for peer training and peer learning (for example, a network of kitchen incubators).

The group then discussed the need to bring innovators together for learning and setting up venues where innovators can share with others (organizations and agencies). At the same time, it was suggested that the

group look at the authorization of some programs (e.g. RBEG) to see what might be tweaked. The discussion shifted to using the National Rural Development Partnership (NRDP) state councils as a means to start the discussions/convening and to identify the barriers to using federal categorical programs. Also mentioned was whether some USDA money (from each division?) may be used to have a facilitated meeting of all units within USDA that work on entrepreneurship and begin to identify overlaps and ways of collaborating.

Susan Matteucci from New Mexico made a connection with Linda Epstein at the meeting. Susan would like to look at whether they can get a disadvantaged business access to entrepreneurship training through the Office of Small and Disadvantaged Business Utilization (OSDBU) in the Commerce Department to get the designations needed – one group in the region that would then train other groups in the area.

Below is the objective, and related activities, that came out of the morning and afternoon session on entrepreneurship.

Objective: Create continuous feed forward and feed back loops between community based organizations and USDA to inform policy development and implementation.

<i>Timeline</i>	<i>People/Orgs Involved</i>	<i>Start Date</i>	<i>End Date</i>
Create a listserv for the group – begin to focus on one program and explore enabling legislation, barriers, etc.	June Holley to set up listserv; all to participate		5/15
Present group’s ideas/discussions to the Rural Prosperity Working Group & include Linda Epstein	Sally Maggard		
Use Ohio as a demonstration project for using state rural development councils as convening group for CBOs to give feedback on missed opportunities to using federal categorical programs – take model to other states (i.e., SC)	David Sears June Holley State RDC director		
Using listserv, go back and identify the next level of program (s) to consider and provide feedback.			

C. IDA/HHS meeting

A number of issues relating to IDA were discussed by the participants in the offices of Sheldon Shalit at HHS. First was the issue of increased administrative support and support services. Sheldon stated that the recommendations for the reauthorization in Congress include suggesting that case management may not be part of administrative services. However, the funds may have to come from the pot of money that goes to clients (since the total amount of money available is not changing) – right now 85% of the money goes to the client and 15% goes to administration. If case management moves out of the 15% area, then there is less available in the 85% zone for clients. He mentioned that pressure is needed from the field. Sandi Smith recommended that local organizations should be able to use the match part as they see fit. Currently local match mirrors federal allocation. In terms of the discussion around support services, Sheldon suggested bringing in more match since 15% of the scoring for these program comes from looking at this.

Also raised was the concern that the regulations are slow. This was a 5-yr project and it is a very prescriptive and micromanaged program. The reserve fund is part of the problem – it is 1:1. The need is for expanding program flexibility for things like home improvement and creating water facilities (Bernie mentioned for buying cars too—an important tool for getting rural people to jobs—but Sheldon has not had that discussion with this administration and would prefer to push home improvement rather than cars since superficially they are not seen as an appreciable asset). Bob Zdenek suggested that we submit a list of concerns and HHS might not oppose the requests; they just have not had the discussions.

Discussions around income eligibility included Bob’s suggestion that linking the federal home loan bank to IDAs could be helpful. Sheldon stated that there is guidance on rules and that one needs to work with a law that is less specific. HHS had wanted the program to be very simple and the match money is difficult. People have high expectations of what they want the program to do. There is (may be?) a shift in the requirements from 200% poverty level to 80% of median salary, but in some cases 80% is a very high number. IDAs are meant to allow people to build financial skills and are not only for the poor.

Discussion then went to the flexibility of match and administrative support. They could make IDAs a true pipeline for many income levels. Sheldon would like to see capacity building to help organizations deal with clients for the long-term through two grants; one for supporting the organization so the infrastructure can grow (since right now all the money goes to the client) and then the second for the clients. This would be statutory; Sandi noted that it could face adamant objections in Congress. Bernie Mazyck suggested that it could ride faith-based initiatives and strengthening organizations. It was noted that case management of a client costs 3 times as much to run the program than what clients get out of it (e.g., \$3000 for case management while a client only saves \$1000). HHS recommendations have been submitted to Congress and Sheldon does not want to reopen that issue. The reauthorization will come up between May and October.

Finally, discussion moved to linking EITC and child tax credits. This is primarily an urban model (Chicago). Bob works with tax sites and gets more free tax preparation services. Rural community action networks CDBG - could link it to asset building.

Below is the objective, and related activities, that came out of the morning and afternoon session on IDAs.

Objective: Within the reauthorization of AFIA, make sure that program support services do not come out of administrative costs. Ideally, have two pots of money – one for capacity building for the IDA organization, and one for clients. A second objective mentioned – but a plan not developed—was to increase the flexibility for which funds can be used – e.g., home improvement.

<i>Timeline</i>	<i>People/Orgs Involved</i>	<i>Start Date</i>	<i>End Date</i>
Begin a series of meeting with CFED (they are already meeting with OCS)	Sandi Smith, others at CFED		
Begin partnerships with other organizations	National Neighborhood Assocs., NCSL, NGA, Nat’l Comm. Econ. Dev.		
Research what funders have been doing, connect with these other constituencies	Kellogg meeting outcomes, Nolton and Moxemburg at Mott, Grantmaker Income Security Taskforce		
Meeting with John Gatz (OCS, at HHS meeting) who reports to Clarence Carter. Ask for a meeting with Clarence Carter	HHS, Bernie have meeting with Jim Richardson and Gast in June		

D. Health care/HHS meeting

Eighteen people representing a number of HHS offices and programs were present at the meeting. The first part of the meeting was devoted to a discussion of the Indian Health Care Improvement Act by Jim Berner and HHS Staff. Jim knows many of the key players in the Indian Health Service and they will be engaged in the policy follow-up on this issue. Over the last hour or so, the group heard about rural policy issues from eight different program representatives, including the Office of Rural Health Policy, Administration on Aging, Administration on Children and Families, Substance Abuse and Mental Health, and the ASPE. The key points of what was said are as follows:

Rural Health Policy – Marcia Brand staffed Task Force

1. Create single-point of access to enter HHS programs (>225 rural programs), so swimming through them is tough
2. There has been a national advisory council on health, now they would like one on human services
3. Seven grant programs
4. August conference for regional level work
5. Increase access to technology
6. Foster collaboration between rural providers
7. Technical assistance for smallest rural hospitals
8. Technical assistance for EMS

Administration on Aging (AOA) – Laura

1. Integrating access to health care
2. Prevention
3. Collaborative efforts
4. Regional centers that may be of use

Administration on Children and Families - Jim Gatz

1. Take a comprehensive approach – health is not separated from human services
2. TANF: Block grant reauthorization – hopes to pass it soon. Would have lots of new technical assistance and much of it would be directed to rural areas.
3. Preventative services
4. Addressing needs of children living with extended families and without resources
5. Works for Clarence Carter
6. NRFC should contact the regional centers and the Living Cities Initiative (a funders collaborative – Casey, McKnight, Knight, etc.). There has been a compassion grant in northern NM (Greg Kelptory)

The Substance Abuse and Mental Health Services Administration (SAMSHA) – Olanda

1. Grants for substance abuse/mental health
2. Targeting methane and crank labs
3. SAMHSA rural network – addresses stigmas
4. Identifying health centers around the country with HKRSA

Also, a good discussion on evaluation occurred at the end of the morning with all agreeing that it was especially difficult in rural areas, that performance measures had to fit the context, and that they work better with older, established organizations. More specific follow up on evaluation was suggested, specifically:

1. Follow-up with SAMHSA on evaluations and see what they have tried to do (see samhsa.gov – directory of model programs they have)
2. ANA is also moving toward performance-based models
3. Reviewing the conversation specifically with ACF would be useful.
4. OCS is sponsoring rural listening sessions. Mostly service provider types, but they would like to include more policy-types, since that transition/translation between practice and policy can be so challenging.
5. Have more conversations with specific units
6. Phil Traynor – lots of information can come out of focal group evaluations
7. Bernie – there are 2 layers: Policy – TANF, AFIA are the 2 big issues and engagement of service providers and how they play out in the communities.

Below is the objective, and related activities, that came out of the morning and afternoon session on health care.

Objective: Passage of the new version of the IHCIA containing Community Health Aide (CHA) program authority for all federally recognized tribes.

<i>Timeline</i>	<i>People/Orgs Involved</i>	<i>Start Date</i>	<i>End Date</i>
Make certain all versions of the new IHCIA contain the CHA Program provision	ANTHC	5/03	5/27/03
Obtain copies of Marcia Brand’s CHA work to find out what she plans	ANTHC	5/03	9/03
Contact Andy Knapp re: data needs	ANTHC	5/03	5/03
Summarize strategy regarding professional groups/boards	ANTHC	5/03	9/03
Dialogue with HHA RTF partners regarding regions/groups suitable for “civilian” CHA programs			
Dialogue with IHS re: potential national CHA support infrastructure	ANTHC	5/03	12/03

IV. Observations and Recommendations for NRFC’s Continuing Policy Work

A. The NRFC niche

Although NRFC has said that its policy niche will be an emphasis on regulatory and administrative matters, at least 2 of its 4 strategic grantees are working on legislation (IDAs and ICHIA). This has implications for the further development of the NRFC National Policy Agenda – especially insofar as NRFC needs to distinguish between its larger agenda and its grantees’ specific work. This also signals the need for NRFC to decide how it will allocate internal and external policy resources to support policy work undertaken by its grantees, on the one hand, and to build a broader agenda supported by its larger constituency, on the other. A related issue is the need, in the near future, to develop an internal policy re: who speaks for and represents the NRFC on policy issues. We suggest that agreement be reached among the funders, agency partners, and grantees on this; then that the policy be made clear to all partners (old and new) through e-mail or at the September meeting.

B. Group efforts on specific issues

While leaders have been required to engage in policy efforts at the local/regional level, to attend workshops, and to undertake other tasks, NRFC evaluations do not address these policy efforts. NRFC should expand its evaluative agenda and work to include policy development as well. For example, by simply providing a basic questionnaire to its grantees on their policy efforts, NRFC could construct an evaluation of participants' policy efforts to measure on-going work as well as final outcomes.

NRFC should also further clarify who takes the lead on various issues. Is it the agency partners? The lead grantee? The soon-to-be-hired full-time NRFC policy staff? Obviously this is important and we recommend that it be clarified among the parties as soon as possible. Related to this is our suggestion that Jim stay in touch with the strategic partners over the summer to follow their policy activities. This could be done via the evaluation form mentioned above.

Also, as we discussed at the workshop, NRFC might give some more guidance to the strategic partners as to how collaborative it wants them to be on national issues. The grantees are perfectly capable of, and in some cases, have a preference for working alone, or with already established national connections. No problem with this – but NRFC should also be forthright in its expectations as to goals/objectives that the Collaborative has set for itself and the grantees .

C. National policy agenda

There are process and substantive questions here. Further clarification is needed of the role of each of the partners – grantees, funders, agency folks, with regard to the development of the agenda and the outreach on it (i.e. WHC or other venue). The substantive question is what will the final NRFC agenda include in terms of issues and what will that mean to external rural policy players? Another task is to decide how the NRFC will bring their agenda into the national discussion (see section A also). Maybe this could be discussed at a steering committee meeting or at the September meeting or both.

D. September meeting

In preparation for the gathering, 3 things should be done: (1) clarify and/or develop NRFC guidelines/policy/etc. on the issues described above; (2) ask the groups what they want at the meeting in the way of a) topics; b) plenary, workshops, etc.; and (3) make clear in the sessions the distinction between the specific issues and the rural policy agenda.

Appendix A

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Appendix B

NRFC Policy Meeting Entrepreneurship Group Meeting at USDA

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NRFC Policy Meeting Health Care Group Meeting at HHS

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**NRFC Policy Meeting
IDA Group Meeting at HHS**

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Appendix C

Issues	Grantees	USDA	HHS	Funder
Wealth Creation/Asset Building				
Department of Commerce funds to CDCs in rural areas for capacity building	x			
Venture capital/access to capital		x		x
Anti predatory lending legislation	x			
Finance and credit to underserved areas				x
Asset building	x			x
Money for community development institutions	x			
Community philanthropy	x			x
Link Earned Income Tax Credits (EITC) and Child Care Tax Credits (16 states have legislation for this)	x			
Encourage alternative financial institutions (e.g., loan funds, community-based credit unions, banks) and support CDFIs	x			
Engage Federal Home and Bank system	x			
IDA				
Expand IDA eligibility	x			
Change match criteria	x			
Loss of eligibility for other programs	x			
Increase admin. Allowable	x			
Make sure that program support services do not come out of administrative costs in AFIA. Ideally have 2 pots of money: one for capacity building for the IDA organization, and one for the clients	x			
Increase the flexibility for which funds can be used (e.g. home improvement) in AFIA	x			
Tax				
Change tax code in home ownership credit	x			
Make changes to payroll taxes	x			
Keep estate tax and the tax on capital gains	x			
Tax credits for working families	x			
New Market Tax Credits – increase allocation and improve program	x			
Resources				
Making resources (\$\$) available to rural youth	x			
Federal/State budgets are squeezing out non-profits – prevent the loss of programmatic money and expand	x			
Leadership/Entrepreneurship				
Focus economic development on existing infrastructure (i.e., ag) instead of shifting to industrial model	x			
Dedicate resources to start-up businesses, salaries, and/or operations, not just feasibility plans	x			
Produce and sustain high quality jobs in rural areas	x			
Enforce anti-trust laws to facilitate rural enterprises	x			
Federal incentives encouraging rural entrepreneurship – NCOE recommendations	x			
CED issues, such as more and sustained funding in block grant money	x			

Issues (continued)	Grantees	USDA	HHS	Funder
WIA (Workforce Investment Act) reauthorization: Better performance criteria making rural providers more competitive	x			
Identify pots of money for planning grants to encourage learning and skill development	x			
Change the relationship with federal agencies (e.g., USDA) and CBOs	x			
Form angel networks for wealth creation	x			
<u>Child and Family Welfare</u>				
TANF Reauthorization – Policy: redefine work first to include skill building opportunities - include practitioners from the field	x			
Access to Health and Human Services	x		x	
Poverty				x
Money for housing	x			
Reauthorizations of TEA 21 to include increased resources for rural public transportation	x			
Pilot a technology program developed by the Administration on Developmental Disabilities (HHS) in AK to test it in extreme conditions	x			
Access to technology	x			
Identify new economic models for tribal areas to support tribal self-sufficiency	x			
<u>Health</u>				
Prevention			x	
Substance abuse (intervention, prevention, treatment)	x		x	
Healthcare access	x		x	
Mental health care			x	
Need ideas for healthcare and small businesses	x			
<u>Education</u>				
Invest in individuals and create talents to sustain community	x			
Rural accommodations within “No Child Left Behind”	x			
Childcare				x
Student retention				x
<u>Administrative and Agency Actions</u>				
Increase agency creativity regarding outreach and pots of money	x			
Change RFP wording that makes rural projects and programs less competitive with partner agencies	x			
Federal reevaluation regarding USDA leading rural development	x			
Expand USDA-RCDI program (a capacity building piece)	x			
Advocate on behalf of the Council for RD, getting an RD coordinator or making a stronger presence of RD Partnerships	x			
Farm Bill Implementation of interagency collaboration for greater alignment of efforts/programs (on the ground)	x			
CDBG funding eligibility of applic. To include CBOs	x			
Find efficiencies in granting from governments	x			
Faith-based initiative – Modified to accommodate rural CBOs (rural reality)/weigh-in	x			

Issues (continued)	Grantees	USDA	HHS	Funder
Other				
Macroeconomics			X	
Sprawl and Smart Growth – raise the rural voice and articulate issues (rural) at those tables	X			X
Integrating CD and ED with services in Rural America			X	
Immigration				
Support legislation providing status adjustment for immigrants	X			
Financial aid for immigrants				X
Pass Dream Act	X			
Uniting "rural"				
Keep rural policy place-based but network communities for learning	X			
Development of a sustained national rural voice in policy, inclusive, diverse – Airlie House Recommendations	X			
Work more collaboratively with other rural advocates	X			
Identify money and allies already in legislation (i.e. Farm Bill)	X			