

Headwaters Foundation

Grantee Input Session – Summary

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Introduction

On August 28, 2024, Headwaters Foundation brought together 43 grantee partners from 17 Western Montana communities for a Grantee Input Session at the Zootown Arts Community Center in downtown Missoula. The session, held from 11am to 2pm, aimed to:

- Create space for partners to share insights and aspirations for health equity in Montana,
- Present Headwaters' updated strategic direction and gather feedback on our theory of change and desired outcomes, and
- Collect input on how partners would like to engage with the Foundation in the coming years.

The gathering focused on our theory of change, a tool that helps us align on how we expect and hope change will unfold. For Headwaters, this framework guides the way we collect data and evaluate our progress toward health equity in Montana.

We do this work in partnership with grantee organizations, so hearing your perspectives on what progress and success look like in Montana is essential. This input helps ensure that as we gather information over the coming years, we're equipped with the right insights to build a robust and nuanced understanding of where we're making strides and where there is still room for growth.

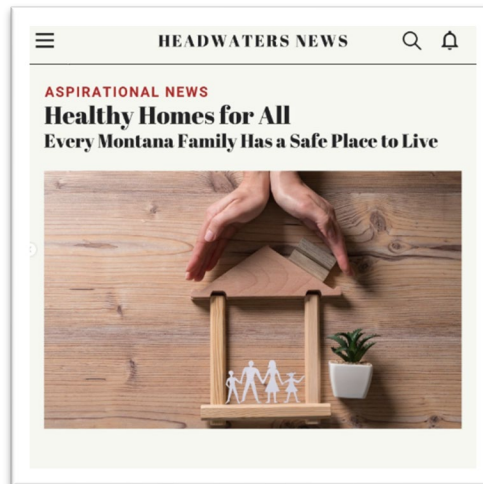
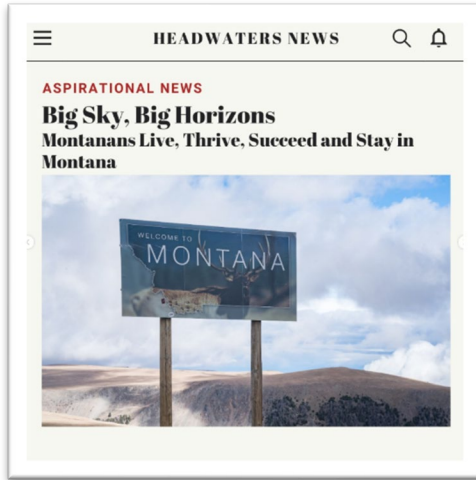
At the meeting, we heard that the draft theory of change we shared – developed based on your input during our strategic refinement process – is largely on track. There was consensus that if families play a more active role in shaping solutions to pressing health challenges, and communities, leaders, systems, and culture increasingly support the health of families, we'll be closer to achieving our shared vision for Western Montana.

This summary highlights key discussion points, how we've incorporated feedback into our theory of change, and initial ideas for future engagement, organized around the session's three main meeting intentions.

Our first intention was to create space for partners to share their insights and aspirations for health equity in Montana.

What Participants Shared

In small groups, participants engaged in an exercise to create a “headline” story that would appear in their local paper, 10 years from now, reflecting how their communities were healthy and thriving. They were encouraged to dream big and craft a story about the success we’ve achieved in the state. We were inspired by the headlines that emerged; here are 5 that stood out to us:



More detail on the ideas generated in this activity can be found in **Appendix A**, and you can check out the [worksheets from the group here](#).

What We Did with the Feedback

We paid close attention to the levers of change and outcomes discussed in the activity, using this feedback to refine our thinking around the theory of change. The insights shared in the Headlines activity largely aligned with the elements shared in our theory of change visual – more engaged families, stronger organizations, and a more supportive ecosystem for health equity.

We are in the process of finalizing an updated version of our theory of change, which we will share with you in early 2025.

How we'll continue to gather input

Our theory of change is a living document that we'll continue to adapt as the needs, context, opportunities, and challenges in our state shift. We'll revisit the theory of change in future meetings to ensure it remains relevant and responsive.

Our second intention was to share our updated strategic direction and gather feedback on the more “in the weeds” outcomes.

What Participants Shared

In addition to insights from the Headlines exercise, participants provided feedback by writing comments or adding post-it notes to posters around the room. The feedback included suggested wording changes, a call for more strengths-based language, clarification on areas that needed more detail, and additions to how we are conceptualizing the outcomes when progress is made.

What We Did with the Feedback

We revised the slides containing our working draft of outcomes, with all changes highlighted in red text.

Engaged Families

By supporting **the leadership and belonging of all youth, parents, and caregivers**, we hope they will cultivate a sense of agency and belonging, amplify their voices to address health challenges, and ultimately leverage their influence and power.

Nearer-term outcomes (closely connected to the work of grantee partners)	Outcomes we hope to see (flowing from the work of grantee partners)	Outcomes we would love to see (hope to influence)
<p>Strengthen Family Power Individual power among youth, parents, and caregivers is strengthened through:</p> <ul style="list-style-type: none">• Developing leadership & skills• Cultivating a stronger sense of agency* and belonging*• Equipping priority populations with skills and providing a platform for them to use their voice/share their own story/share their opinions and expertise• Integrating healing, identity & belonging into approaches	<p>Engage in Exercising Power More youth, parents, and caregivers are engaged in activities in support of health equity/access to SDOH, such as:</p> <ul style="list-style-type: none">• It is safe for families to engage• Clear pathways for youth, parents, and caregivers to engage in policy advocacy• Engaging in collective actions• Bringing voice to development, establishment, and implementation of policy solutions• Expanding the base of people who care about issues• More organizations and decision-making tables made truly accessible to families and youth	<p>Realize Power Youth, parents, and caregivers are increasingly using their power, demonstrated through:</p> <ul style="list-style-type: none">• Representation in positions of power (e.g., students on boards for youth engagement)• More influence and control over policies, practices, and funding decisions that impact their lives• Increased recognition as key experts and stakeholders on the decisions that impact them (e.g., among state legislature)• Use power to influence / break down barriers for future participants

Strong Organizations



By supporting **organizing and advocacy**, including strong advocacy coalitions and networks, we ultimately aim to see policies **passed** and implemented that reflect the priorities of families facing the greatest barriers to health.

Nearer-term outcomes (closely connected to the work of grantee partners)

Strong Organizations

Building capacity of grassroots organizers, advocacy organizations, coalitions, and networks through:

- Supporting staff & leadership
- Organizational resilience to **anticipate and** withstand funding dips
- Staff health and wellness
- Increased collaboration with family-serving organizational partners
- Increase capacity to **recognize**, support and engage in DEI activities

Outcomes we hope to see (flowing from the work of grantee partners)

More Voices at the Power Tables

Strengthening relationships within and between direct service / grassroots organizing / advocacy organizations so that:

- Organizations have stronger relationships with priority populations, **decision makers, and other organizations**
- Policy agendas are informed by lived expert partners
- Leadership positions **held** by lived experts in coalitions and networks increases, **and lived experts feel welcomed and valued**
- Organizations, coalitions and networks have stronger, more effective communications **and systems for coordination**

Outcomes we would love to see (hope to influence)

Policies that support health equity

Increasing the connection between individuals experiencing barriers to health, advocacy organizations, and policymakers so that:

- **More platforms and opportunities to educate policy makers on issues**
- Policies that reflect the priorities **and values** of priority populations are enacted and implemented with **durable funding sources**



Supportive Ecosystem



By supporting **research, journalism, storytelling, and convenings**, we aim to deepen public understanding of health equity and the challenges faced by our priority populations, spark more positive narratives and mindsets about these communities and build broader support for policies that advance health equity.

Nearer-term outcomes (closely connected to the work of grantee partners)

- Increased **research** related to health inequities
- **Increased stories from** people impacted by systemic health inequities (**collected in ways that are trauma-informed and compensate the storytellers**) and that offer creative solutions to systemic inequities
- **Stronger relationships** between organizations, policymakers, and other stakeholders
- **Increased understanding** of which messages resonate, on what platforms, and for which audiences

Outcomes we hope to see (flowing from the work of grantee partners)

Shifts in Information Flows

- Sharing of research between family-serving organizations, advocacy organizations, and policymakers

Stronger Movements

- More advocacy agendas informed by diverse constituent voices
- More voices represented in meetings, workshops, hearings, and communications
- More people from priority populations in leadership positions within the movement, supported with professional development and training as needed

Outcomes we would love to see (hope to influence)

Shifts in Cultural/Social Norms

Supporting structures in the ecosystem contribute to people in western Montana:

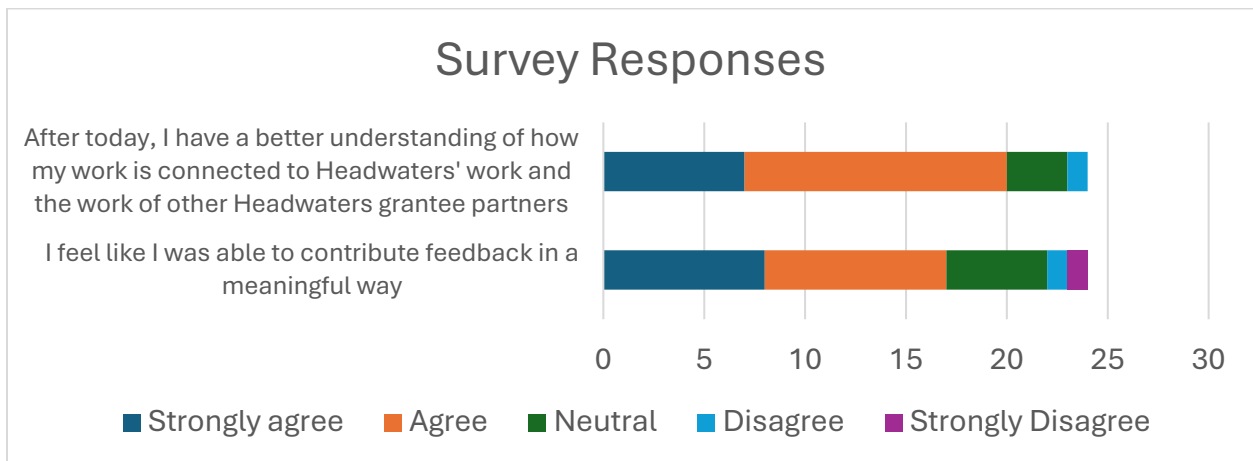
- having a deeper understanding of health equity and the challenges for our priority populations
- More positive narratives and mindsets **about** priority populations
- Broader support for policies that support health equity
- **Policies / orgs / communities include disabled Montanans as full participant members and leaders**



How We'll Continue to Gather Input

Just as our theory of change evolves, our understanding of the outcomes will also grow and adapt to Montana's shifting context and opportunities. We'll continue to deepen our shared understanding of what progress looks like in these areas through regular check-ins and/or reporting meetings with grantee partners.

While most respondents in the post-event survey agreed that they felt more connected to Headwaters' work and had meaningful opportunities to provide feedback, this was not a universal experience. We value this feedback and have taken time to reflect on ways to improve future convenings. The next session outlines our ideas for continued engagement.



Our third intention was to gather input on how partners would like to engage with the Foundation in the next few years.

What Participants Shared

We collected feedback through a “chalk talk” activity where participants wrote comments on posters around the room, and through our post-event survey.

Regarding future meetings and sensemaking, participants suggested:

- In-person meetings are preferred, with smaller groups or multiple breakout sessions; continue to provide accommodations, including for folks with anxiety and specific engagement needs.
- Zoom works well for presentations, especially when using breakout rooms.
- Offer opportunities for people to convene with similar organizations, and/or groups working on the same issues or goals.
- Continue providing travel stipends.
- Time, distance, and travel are significant barriers; consider regional meetings and plan several months in advance.

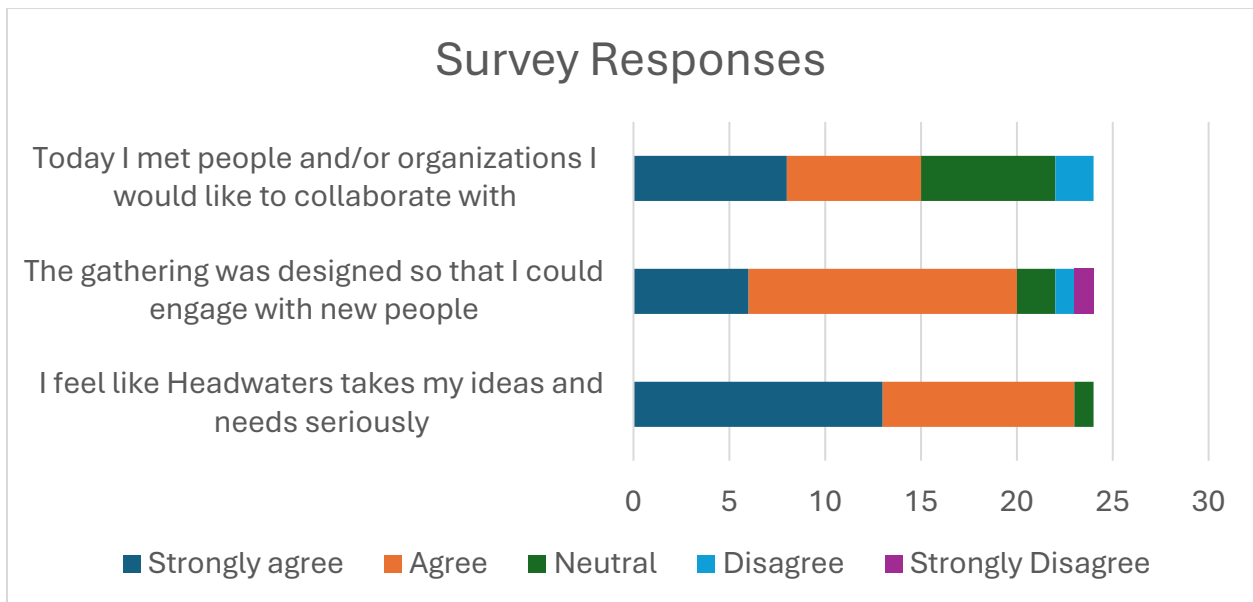
Regarding one-on-one meetings and calls with Headwaters staff, participants shared:

- Continue to offer the narrative reporting option.
- Grantees appreciate the thought partnership and support.
- Explore ways to better connect grantees with other funders and organizations (related to sensemaking sessions).
- Provide more regular updates to grantees on what we’re observing (e.g., tailored newsletters, quarterly updates on outcome areas, theory

of change updates). Consider a grantee-focused newsletter oriented around Headwaters' questions, with links to articles, events, etc.

More detailed feedback can be found in Appendix C.

We also aimed for the meeting to be a place where participants could connect with colleagues and partners from across the region. In the post-event survey, 23 of 24 respondents said that they met at least one person they hadn't met before. Respondents also felt that Headwaters takes their ideas seriously and designed the gathering to facilitate new connections. While most respondents met organizations they'd like to collaborate with, fewer reported this outcome.



What We Are Doing with the Feedback

We will incorporate this feedback as we plan future gatherings. While we know we can't create a format that works perfectly for everyone, some consistent themes emerged that we will act on.

Group size. We'll likely move toward smaller gatherings, and when convening large groups on Zoom, we'll make good use of breakout rooms.

Location. We'd love to host meetings around our region. If you have suggestions for venues or facilitators, please share them with us.

Groupings. Over time, we may convene smaller groups based on the types of data we collect. While we don't have any immediate evaluation activities planned, we may hold convenings to collectively understand the systems we're working in and explore opportunities to leverage each other's strengths to support families.

Facilitation and meeting content. We heard that many of you want more time to connect with us and one another. In future meetings, we'll schedule optional networking time and prioritize activities that encourage interaction with people from across the region.

We'll also continue to reduce barriers to participation by providing food, covering lodging and transportation costs, and offering honoraria.

One-on-one meetings with partners. We will continue to offer phone conversations and meetings as an option for reporting.

Sharing what we're learning. We share what we are learning in various ways:

Website, quarterly newsletter and social media: we feature interviews with grantee partners and community leaders, research on key issues, insights on Trust-Based Philanthropy, and more. Be sure to [visit our blog](#), [sign up for our newsletter](#) and follow us on [Facebook](#), [Instagram](#) and [LinkedIn](#).

Evaluation and Learning Data Book: Each year, our team compiles a comprehensive data book with oral and written reporting data, internal goal-tracking metrics and lessons learned. This tool helps us determine what is working, what isn't, and how we can adapt to better serve our grantees and communities. [You can find our most recent Learning Book here.](#)

We will continue to explore new ways to share insights from partners, as well as lessons learned from initiatives in other states and at the national level.

How We'll Continue to Gather Input

We'll keep seeking feedback at future gatherings and during one-on-one engagements. Please continue sharing your thoughts and ideas for better gatherings with us through your Resource Partner or at contact@headwatersmt.org.

Parting Thoughts

We want to express our deep gratitude to all the participants who joined us in Missoula to share their input on our theory of change, outcomes, and future approaches to gathering. We appreciate the time, thoughtfulness, energy, enthusiasm and candor you brought to the session. We are fortunate to have partners like you across our region, working together to build a Western Montana where children and families are healthy and strong, communities thrive, and the voices of those most impacted by inequity are heard as they actively shape solutions for their communities.

Appendix A: List of Participants

Josie Hayes-Johnson	Alberton PTSA	Alberton
Terry Vaughn	Anaconda Ministerial Project Care	Anaconda
Craig Sweet	Anaconda Family Resource Center	Anaconda, Montana
Rochelle Hesford	Southwest Montana Youth Partners	Boulder
Bernice Hawkaluk	Charlo Community Outdoor Complex	Charlo
Kayla Robbins	Helping Hooves	Dillon
Jessica Fitzpatrick	HEARTism Community Center	Hamilton
Stacey Umhey	SAFE (Supporters of abuse Free Environments), Inc.	Hamilton
Adam Jespersen	Montana Nonprofit Association	Helena
Rose Bender	Montana Budget & Policy Center	Helena
Sarah Penix	Montana Free Press	Helena
Dustina Deans	Lincoln County Libraries	Libby
Dorey Rowland	Lincoln County Public Health	Libby
Jim May	Kootenai Heritage Council, Inc.	Libby
Ashley Ostheimer	Watson Children's Shelter	Missoula
Caroline Simms	Missoula Writing Collaborative	Missoula

Cecily Whitworth	Montana Family ASL	Missoula
Dana Kingfisher	All Nations Health Center	Missoula
Gayle Carlson	Montana Food Bank Network	Missoula
Grace Decker	Montana Advocates for Children	Missoula
Hannah Kosel	North Missoula CDC	Missoula
Heidi Wallace	EmpowerMT	Missoula
SJ Howell	Montana Women Vote	Missoula
Kate Chapin	UM Center for Children, Families, and Workforce Development	Missoula
Kelly Webster	University of Montana	Missoula
Kezia Halverson	Boys & Girls Club of Missoula County	Missoula
Kristina Lucero	American Indian Governance and Policy Institute	Missoula
Laura Olsonoski	Moving Mountains Foundation	Missoula
Lisa Verlanic Fowler	Loads of Dignity	Missoula
Skye McGinty	Partnership Health Center	Missoula
Melissa Lafontaine	Earth Within Girls	Missoula
Stephanie Dolan	The Poverello Center	Missoula
Susan Hay Patrick	United Way of Missoula County	Missoula

Tammy Tolleson Knee	Montana Safe Schools Center	Missoula
Shay Farmer	Salish Kootenai College	Pablo
Ann Marie McNeel	CASA of Lake & Sanders Counties / Youth Connection	Polson
Jennifer Rolfsness	Helping Hands of Mission Valley & Zero to Five Flathead reservation & Lake County	Polson
Jan Tusick	Mission West Community Development Partners	Ronan
Claire Muller	Seeley Lake Community Foundation	Seeley Lake
Ruth Bergen	Sparrow's Vine	Seeley Lake
Debbie Hanson	Mineral County Community Foundation	Superior
Andrea Christensen	Project ASCENT	Thompson Falls
Gretchen Boyer	Montana Land to Hand	Whitefish

Appendix B: Summary table of headlines activity themes

The prompt: *Imagine yourself, your family and friends, 10 years into the future. Imagine your neighborhood, and your town. Imagine you are seeing healthy and strong families. Imagine your community is thriving. You see a diverse set of people, engaging together. They're healthy and happy. You go home to reflect on what you've just seen, and begin typing the article that is due to your editor in a few minutes.*

<p>Levers of change</p> <ul style="list-style-type: none"> • Education • Increasing youth's sense of belonging, well-being, identity • Voting / civic engagement (including rural and tribal people) • Collective involvement; lifting-up underrepresented voices; listening to one another • Intergenerational work • Youth empowerment • Policy change & advocacy • Centering families and people with lived-experience • Stakeholders model self care and work life balance 	<p>Important outcomes</p> <ul style="list-style-type: none"> • Increasing youth's sense of belonging, well-being, identity • Building sense of initiative and responsibility • Healthy and supportive families • Increased access for Montana families to healthy and delicious food, developmental resources, safe play spaces, physical and mental health services, housing • All-inclusive social programs • Cultural shifts • Shifts in collective understanding [of food insecurity] • Racial equity; LGBTQ+ equity • Stronger organizations • Shifts in resources flows / allocation • Shifts in employer practices & policies • More supportive policies are passed AND implemented
<p>What did we build upon?</p> <ul style="list-style-type: none"> • Sense of community-mindedness • Shared sense of the common good; shared values 	<p>People involved</p> <ul style="list-style-type: none"> • Teachers, educators, schools • Families and extended families • Zero to Five

<ul style="list-style-type: none"> • People’s passion and drive • Listening to each other & working together • Shared accountability and responsibility • Existing networks & alliances • Expansion of successful efforts e.g., 0-5 expand thru 18 • Deep history in the state (e.g., of agriculture) • Long relationships • Frontier spirit 	<ul style="list-style-type: none"> • Youth • Community members • Farmers and ranchers • Local businesses • Health care providers • Tribal elders • Faith-based communities • Policy makers / government staff • Businesses and employers
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Appendix C: Feedback on Continued Engagement with Headwaters

<p>Feedback on modes of engagement</p>	<p>Participants were interested in a variety of ways to engage, including:</p> <ul style="list-style-type: none"> • Continued in-person conversations, but likely with smaller groups or use more breakouts • Zoom is appreciated, especially for presentations, and always have a phone option for those who would prefer to call-in • Email is great for updates and the newsletter <p>Across all modes of engagement, we heard feedback that we should strive to be inclusive and accommodating to various needs, and when possible, make things visual (e.g., by using graphic facilitators or engaging with artists); there were also calls for more storytelling and sharing.</p>
<p>Feedback on which peer groups are helpful to convene</p>	<p>Participants shared a variety of possible attendee groupings that would be useful to them, including:</p> <ul style="list-style-type: none"> • Groups working on similar policy priorities or goals • Groups with similar barriers or challenges, and/or similar strengths • People who have similar tenure and/or experience • Groups serving or focused on those people who are most vulnerable • Groups that include community partners e.g., schools, law enforcement, community health organizations, media, that might not be Headwaters grantee partners
<p>Ways that Headwaters can enable participation</p>	<p>Participants shared what Headwaters could do to make participation easier:</p> <ul style="list-style-type: none"> • Invite us; ask! • Group attendees with peers • Provide compensation / stipends • Allow attendees to bring along partner organizations that may not work with Headwaters • Provide free / low-cost trainings (e.g., with CEOs, grant writing) • Include collaboration with supporting groups and agencies

	<ul style="list-style-type: none"> • Offer options to join remotely • Engage storytellers to participate in or host the meetings (including visual) • Host meetings in towns across the region
<p>Barriers people face in participating in Headwater events / meetings</p>	<p>Participants shared what barriers hindered participation:</p> <ul style="list-style-type: none"> • Time (3 hours was good); taking the time off from work and otherwise fitting the meetings into a busy schedule • Weather • Lack of qualified interpreters / general familiarity around deaf communities • Anxiety – makes big groups challenging for some people • Location / distance to travel • Unclear request or explanation of the activities, outcomes, purpose of the meeting <p>Headwaters will continue to do outreach to grantees that weren't in the room to understand the barriers to their participation.</p>

Appendix D: Survey open-ended responses

Note: Responses have been lightly edited for readability; feedback referencing specific individuals, when constructive, is shared directly with them, and not included in the summary.

Question: What was one key takeaway from this gathering?

Themes: Connection, learning about other grantee organizations, and learning about Headwaters' work

- *Gaining a better understanding of how we are all connected.*
- *That W. MT is fortunate to have so many folks working hard to make life better for our communities.*
- *Headwater's perspectives for the future*
- *How genuinely connected we are and how we need community and support from one another.*
- *It was very helpful to hear more about Headwaters' new strategic goals and how they are being envisioned in the theory of change.*
- *A deeper understanding of the new strategic framework*
- *Headwaters is seeking ways to better impact the communities in Montana and connect the organizations it connects*
- *I was fascinated on the reach that Headwaters provides! I appreciated the interactive session.*
- *Lot of people doing really great, diverse work.*
- *Exciting work is happening at Headwaters and all across Western Montana! It was wonderful to be present in that space with so many people with a passion to improve the well-being of their communities through a variety of different approaches.*

- *A much more comprehensive understanding of the goals and missions of the Headwaters Foundation. this, in turn, will give our organization better focus on these goals and how they mesh with our goals!*
- *It was great to see how collaborative and open to feedback Headwaters is!*
- *Your focus is shifting to advocacy.*
- *As a new representative for my organization, I was primarily there to learn what the Headwaters Organization is all about. My eyes were opened to many incredible ideas and wonderful people with whom to collaborate.*
- *The number of nonprofits that Headwaters works with.*
- *I was able to provide headwater with feedback on their strategic plan and change framework, which will be helpful to you and grantees in the long run.*
- *There was such a positive vibe, it was enjoyable to be there.*
- *A clearer understanding of Headwaters pillars of focus*
- *Unfortunately, I felt that traditional nonprofit executive leadership was prioritized over those with lived experiences during the gathering. Additionally, I question focusing on policy as a lever change. What would it look like to use our money and power in confronting those that are using policy to take away our rights and community autonomy?*
- *There are so many people and organizations tackling issues of health in Montana from so many different angles, all of them inspiring.*
- *We work better when we align for a common goal.*
- *Stories are important because they provide valuable feedback to policy makers, funders, and program leaders.*

Question: What is one thing you would have liked us to do differently or would have liked to see more of?

Themes: More time, more space, more focus on getting to know each other and Headwaters (introductions, networking time, an attendee list), facilitation improvements

- *I appreciated that the meeting was mid-day and a good amount of time which allowed me to drive there and back in one day. Food was delicious!*
- *The small group work seemed rushed. More time might have facilitated better input.*
- *Not so many people at the sheets on the walls at one time*
- *This was very well structured and I learned a lot, let's do it again!*
- *I would have liked to know who else was in the room - a round of intros, maybe.*
- *It's hard to believe that the limited feedback we provided at the meeting will be of much help. Also, there was virtually no opportunity for networking, other than at our little tables. We couldn't engage meaningfully with each other. Other than the folks I already knew, and the two I met at my table, I have very little idea of who else was in the room. That seems like a missed opportunity for us all.*
- *I loved this gathering, and would have liked more time to engage with other nonprofit leaders, as well as learn more about Headwaters.*
- *"Bigger space. The feedback forms were hard to do. I was not able to read everything as I met a new potential partner so we ended up talking shop. More time to fully provide my feedback. Also, some of the jargon was repetitive so a possible interpreter as what that looks like when applied to the community."*
- *Probably needed more time to dive into things. It felt rushed. I think more time for conversation amongst the grantees would have been*

great. To have more time to connect projects, people and future partnerships.

- *The information was so rich and interesting that it felt like time ran out quickly when we would be in a discussion as a small group. I know there was so much to get through and you were being mindful of everyone's time.*
- *Either before or even after, a contact list of everyone and each group that was in attendance.*
- *The setting was nice and it was great to be a part of the big picture development. Even though this was not the focus of our time together, I would love to have more time to hear more about the success stories of other nonprofits.*
- *Was not impressed by the facilitation.*
- *I would like to see smaller regional or sub-groups that meet periodically, from these groups we would be better prepared to share our visions, needs, and desires.*
- *Nothing*
- *I would have loved to meet the staff, there was no real introduction. I know you are hiring, yet no information was given about that. There was no "get to know you" time. Really - I know your intentions were to not over burden folks, but I drove a long way and really did not get anything that directly benefited my organization or my understanding of Headwaters. I think it would have been better to have a longer day that gave more time for these things. Again, I know you were trying to be respectful of everyone's time and your intentions are amazing, but I felt like it was not a great use of my time and energy. I would definitely come again if there was more time to get to know staff, ask questions and really get to know other grantees.*
- *More opportunities to network and engage with organizations outside of our own scope of work.*

- *The presentation felt very wordy. It could have been helpful to less words on the screen and more engaging activities/speakers throughout the day.*
- *It might have been helpful to solicit feedback from us earlier on, and with more time dedicated to that. The background / foundational info was very interesting and helpful, but could have been condensed.*
- *More time! I thought the session was great and people were just starting to really dive into the topics and ideas. I think with a longer time period deeper more in-depth discussions would have taken place. We just scratched the surface of all of the possibilities.*
- *A little more time together. Larger tables.*

Question: What is something you'd like Headwaters to know that you did not get to share today?

- *I would love to be able to continue to offer my thoughts as I process and think about new possibilities.*
- *If you wish to hear from grantees in the future you might consider holding more than one meeting with fewer grantees at each session. I think smaller overall groups might provide better interactions and ideas.*
- *N/A*
- *Nothing specific comes to mind - the only thing I will offer is that the set-up for feedback didn't really allow for feedback on the strategic goals holistically, but rather focused in on each component and how it was communicated in the theory of change. I think it could have been interesting to hear feedback from groups in the room about the goals overall.*
- *It definitely seems as if Headwaters is shifting to more of an advocacy focus, which is space it hasn't worked in much before. Please acknowledge that there are existing organizations currently working in*

[advocacy] spaces that have experience and expertise that should not be discounted.

- *We feel very appreciated as Headwaters grantees. But there is a LOT of uncertainty among the Headwaters grantee community, heightened in a year of great financial/fundraising uncertainty for us all.*
- *The team at Headwaters is incredible, our organization loves working with Headwaters. The attention to detail, goals, and impact you are making is instrumental to the health of organizations you support, but more importantly the HUMAN connection makes a huge difference, it's very inspirational and motivating.*
- *Nothing at the moment*
- *Positive = Because of the Headwaters grants we are bringing partners and people to the table (of our strategic planning groups) that otherwise would not connect.*
- *I have so much gratitude for this organization and it was amazing to see the number of organizations that have benefited from Headwaters support and collaboration. I know the positive impact of the GO! Grant had on my community and it was amazing to expand my viewpoint beyond my community.*
- *Just how our work parallels the Headwaters' missions. Ultimately we share in the safe and healthy wellbeing of families, youth and other targeted groups!*
- *You are on the right track! The innovation on how you respect and involve your grantees is a model that needs to spread in the philanthropic world.*
- *I appreciate this opportunity.*
- *Nothing*
- *You are amazing partners!*
- *I would love for Headwaters to explore working with community organizers that aren't with established nonprofits. Often, folks with lived*

experience have barriers to the nonprofit space but are naturally making incredible change within their communities!

- *That small non profits are really struggling. And that Headwaters is a huge help in making their grantmaking accessible and 'easy.' Trust-based philanthropy goes a long way, and Headwaters is setting a powerful example for other foundations. Thank you.*
- *You are appreciated and your work helps all of us impact families in a positive way.*
- *I can't think of anything.*

Question: As you think about the work ahead of us, what is one thing you're energized by, and/or one thing that's worrying you?

Themes – energizing: other grantees, community, systems change, ecosystems supports, trust-based philanthropy

Themes – worrying: money, politics

- *I am energized by the amazing grantees who do amazing work. I hope we get to continue to work with Headwaters.*
- *I'm energized by all of the attendees and the work they do. Somewhat worried about the amount and scope of needs that go unmet.*
- *Meeting new people and learning about their efforts*
- *I am excited to see more focus on community and helping to create a society of care and abundance. Political tensions are concerning.*
- *I'm energized by increased opportunity for meaningful systems change in the years ahead, and worried (as always) about whether MT will continue to see investment from national funders.*
- *"Energized because I believe in Headwaters' bold new direction and believe my organization's work aligns closely with it. Worried about money. When the message is, ""we'll be granting more, but you'll likely receive less"" -- it is anxiety-producing."*

- *I loved seeing the goals in the theory of change that are about keeping organizations healthy, and look forward to seeing what type of actions Headwaters will take to achieve this goal. With significant changes within Headwaters, my concern is funding opportunities will change for smaller organizations.*
- *I really appreciate the flexibility and support that Headwaters provides. It is energizing to know that you meet us where we're at.*
- *Energized by the fact that we are starting to feel the shift of the work we have been doing. A worry is always funding the projects.*
- *I am energized by the collective whole that is working to impact numerous communities in the state of Montana. I am worried about the number of needs and struggles that communities experience daily. I also worry about burnout of those working in many roles to do the hard work.*
- *I am just more motivated to continue our work as part of the whole picture of community health and growth. I do worry about funding from government sources drying up.*
- *One of my favorite parts of our time together was learning about other organizations that Headwaters supports. I am energized to continue to be impactful in Southwest Montana and continue to build upon the work already completed.*
- *The community-focused and family-driven vision energizes me. I worry about the actual execution of such big goals.*
- *Nothing*
- *I love your trust based philanthropy approach and I appreciate it so much as an ED. I found this year that many grants I thought I would get, I did not. I am worried about paying my staff a livable wage!*
- *Many commented on the fact that yours is one of the easiest grant applications to fill out - PLEASE keep it that way!*
- *I'm excited to see how aligned our organization is with Headwaters going into the future.*

- *I am energized by Headwaters interest in community feedback, but worried about the way it is gathered. The event felt inaccessible and a bit too big picture and disconnected from the work to understand its impact.*
- *I was very energized by the connections I was able to make in the room, and by the creative solutions to challenges coming from so many different organizations.*
- *Political Climate and lack of stabilized funding scare me, but I feel energized by the amount of hope and positivity that was within the room.*
- *I am excited for the work ahead! Building healthier families will strengthen our community!*