



**Managing and Implementing the
Program for the Rural Carolinas:
The Role of Staff**

**Chapin Hall Center for Children
at The University of Chicago**

on behalf of The Duke Endowment

May 2004

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From The Duke Endowment

We entered new ground while traversing old trails. The Endowment has been working with rural churches and rural hospitals since its inception and for over 80 years. We take this work very seriously.

Working in concert with our traditional beneficiaries, in August 2001, the Board of Trustees of The Duke Endowment approved the creation of the Program for the Rural Carolinas, an effort to help rural communities in the Carolinas develop their economic assets. The rural program was a three-year initiative and operated on the principle of helping traditional Endowment beneficiaries develop partnerships with other agencies in their communities to work together on a common goal. We believe our beneficiaries and their work will prosper when their communities experience healthy growth and economic stability.

This program was divided into two parts: Option 1, for rural communities demonstrating the ability to undertake large-scale collaborative efforts to energize community development and strengthen economic vitality, and Option 2, for rural communities that choose to undertake innovative smaller-scale projects with fewer partners but still with the potential for economic and community impact. Both groups received direct grants and assistance from the Endowment, as well as coaching, skills training and other assistance from MDC Inc., the Chapel Hill-based economic research and workforce development agency that is the Endowment's partner in managing the program.

Chapin Hall at the University of Chicago was another partner. They worked with participants in the Program – the sites, The Duke Endowment, and MDC – to establish a way to learn systematically from the planning and implementation of Program activities and to assess the successes and challenges the Program encounters. This learning and assessment provided information and analysis useful to participants as they refined and implemented their work and, potentially, to inform people and organizations working in other communities.

The Endowment selected 22 sites that received funding in 2002. Two sites withdrew in 2003 and 2004. Twenty sites participated through 2005, 14 sites are in a second phase with a focus on sustainability. The program will end in 2007. We learned much from this program and want to share this information with those interested in helping rural communities develop their economic assets, how rural churches and hospitals can have a role in this work and lessons we learned about managing a program of this scale.

Sincerely,

Eugene W. Cochrane, Jr.
President

Toni L. Freeman
Director of Project Research and Evaluation

May 2006

Participating Programs

The Endowment received 93 completed applications for the program, 57 from North Carolina and 36 from South Carolina. Staff members from the Endowment and MDC reviewed applications and made site visits to the communities submitting the most promising proposals we compared findings in a series of meetings and conference calls. In June 2002, Trustees of the Endowment selected 22 sites that would receive funding under the program. Two sites withdrew by 2005 and 14 sites are in the final phase of the program that will end in 2007. A complete list of the participating beneficiaries and their programs is in Appendix A.

Beneficiary	Service Area County
Allendale County Hospital	Allendale County, SC
Calvary Memorial United Methodist Church	Greene County, NC
Columbus County Hospital	Columbus County, NC
Duncan Memorial United Methodist Church	Georgetown, SC
Greenville District United Methodist Church	Beaufort County, NC
Hildebran United Methodist Church	Burke County, NC
Hinton Rural Life Center	Cherokee, Clay, Graham & Swain Counties, NC
Hot Springs Health Center	Madison County, NC
Hyde County Cooperative Parish (United Methodist Church)	Hyde County, NC
Isaiah United Methodist Church	Colleton County, SC
Maria Parham Hospital	Vance County, NC
Marion County Medical Center	Marion County, SC
North Wilkesboro District United Methodist Church	Alleghany, Ashe & Wilkes Counties, NC
Onslow Memorial Hospital	Onslow County, NC
Pender Memorial Hospital	Pender County, NC
Pilmoor United Methodist Church	Camden & Currituck Counties, NC
Pinetop United Methodist Church	Edgecombe County, NC
Randolph Hospital	Randolph County, NC
Roanoke Chowan Hospital	Bertie, Gates, Hertford & Northampton Counties, NC
The Rockingham District United Methodist Church	Robeson County, NC
Shady Grove United Methodist Church	Lower Orangeburg & Upper Dorchester Counties, NC
Snow Hill United Methodist Church	Stokes County, NC

Introduction to the Chapin Hall Learning Project Working Memoranda March 2006

One of the products of the Chapin Hall Learning Project is a series of Working Memoranda that serve as a vehicle for dialogue about what the Program for the Rural Carolinas (PRC) is accomplishing, what challenges it is facing, and what strategies might help to address these challenges in order to maximize impact. This Introduction describes the purpose of the Working Memoranda, how they were developed, and what they have focused on.

What is the purpose of the Working Memoranda?

The goal of the Working Memoranda is to provide useful information and analysis designed to stimulate mutual reflection and learning about key questions and issues arising as PRC evolved. As expected, significant variation existed across the original 23 (now 20) PRC sites in their histories and contexts, strengths and challenges, and in the local opportunities on which they had to build. Our analysis was at the cross-site level whereby we aimed to draw from the unique experiences of individual sites to identify larger patterns, themes, and lessons. Our focus on learning rather than on assessment positioned us to be learning partners rather than evaluators, although we hoped that the issues covered in the Memoranda helped to shape each site's own self-evaluation.

The Working Memoranda are conceptualized as a collaborative effort, so we periodically asked all of PRC's stakeholders what questions they wanted the Memoranda to address. When we completed a Memorandum, we issued it in draft form so that everyone had an opportunity to review and provide input before it was finalized. We encouraged the sites to review the draft to see where their experience was consistent or not with the narrative: what was the evidence for their assessment? What other confirming or competing points or lessons on the topic could they contribute? What examples could they provide to help deepen the learning from PRC?

Because our aim was to capture the learning along the way, each Memorandum should be understood in the context of the particular stage of PRC's development in which it was released. Sometimes information was updated in later Memoranda and sometimes the same issue was treated quite differently in Memoranda that came out at different times.

On what data are the Working Memoranda based?

The Working Memoranda are based on a number of sources of data collected over a three-year period starting in April 2003: at least two site visits annually to the Option 1 sites, during which Learning Project staff attended team meetings and community events and interviewed team members, staff, local officials, program participants, and other observers. We also read site materials, communicated with team members and staff by phone and email; attended learning cluster workshops and annual cross-site learning institutes; administered surveys; talked periodically with MDC staff and coaches; and interviewed relevant program staff at The Duke Endowment.

Who is the audience for the Working Memoranda?

PRC teams, staff and other local stakeholders are a primary audience for the Working Memoranda. Other key audiences include The Duke Endowment and MDC. Finally, the memoranda may also be of interest to other practitioners, funders and policymakers concerned with rural economic development, community building, and the role of philanthropy in community change. A list of the working memoranda topics is in Appendix B.

Chapin Hall Center for Children at the University of Chicago

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Managing and Implementing the Program for the Rural Carolinas: The Role of Staff May 2004

Introduction

At its core, the Program for the Rural Carolinas is about engaging diverse sectors of the community to work together to strengthen the local economy. PRC's vehicle for change is a collaborative team of people who share a commitment to community renewal and who bring different talents, resources, and connections to bear upon this renewal process. As they move from vision to action and involve an increasing number of people and organizations in the effort, the teams face significant management and implementation challenges. How can all the activities be coordinated? How can everyone be kept in the communication loop? How does the actual program work get done? And how can the interest of a diverse group of volunteers be sustained so that they continue to contribute their time, energy and ideas to stimulate change?

This Working Memorandum examines the role of staff in supporting the work of the PRC teams. First we focus on the Coordinators, who are the key facilitators of PRC's work.¹ Then we turn to the role of project staff in PRC implementation. What the Coordinator and project staff actually do in a site partly depends, however, on what tasks the Team members are willing and able to take on and what additional vehicles the Team can create or access for carrying out the work. So in order to provide a context for discussing staff roles, we also outline the different ways in which the sites carry out their agendas that do not centrally involve staff. The Working Memorandum ends with some questions concerning how the work gets done as Teams move into the second half of the PRC.

PRC Coordinators

Coordinator Role and Tasks. Initially PRC designers left it to the Teams to determine what sort of staff support would best serve their needs. Although having a Coordinator was not a mandate from TDE or MDC, all of the Option 1 sites determined either at the beginning of the first year or at some point during it that such a staff person was needed, and each site hired one.² Given the central role of the Teams in the PRC model and the caveat from its designers that PRC should be staff-facilitated rather than staff-driven, the Coordinator role was conceived as one focused primarily on facilitating, coordinating, and communicating. Staff should “not be the ‘doer’ but the ‘facilitator,’ the hub of the wheel who makes sure work gets done, who makes sure that the team grows and learns and spreads the word and builds hope. If you [the Coordinator] are going to succeed, you should not and cannot be the person who does all the work.”³ Our recent interviews with staff and a number of team members in each Option 1 site suggest a **basic**

¹ Each Team calls this person something different (Project Director, Executive Director, Program Administrator, Project Coordinator, etc.) but for purposes of cross-site comparison, we use “Coordinator” to refer to the lead staff person who facilitates and oversees the Team's work and “project staff” to refer to staff hired for specific project purposes.

² Chapin Hall's Learning Project has collected data from Option 1 sites only.

³ Memorandum from Leslie Boney to PRC Option 1 Staff, November 2003.

consensus about this definition of the role: Coordinators should be working towards supporting the program of work developed by the Teams, not doing the work themselves. Before we address the challenges of implementing this charge, we turn to what the Coordinators say about what they do on a day-to-day basis.

Coordinators report that they spend most of their time doing the tasks listed below. Not all the Coordinators do all the tasks, and some are shared with the Chair of the Team, the Executive Committee, the Chair of a Committee, or an administrative support person if the site has one. These tasks define the core of the Coordinator's work:

- **Prepare** for Team meetings, set the agenda (often with the Chair), send out advance materials, handle logistics (space/refreshments), write and distribute minutes
- **Foster** the flow of information among Team members (through a group email distribution list, phone calls, etc.) and other means as well, since some Team members don't use email), schedule meetings, make sure Committees report to the Team on their work
- **Maintain** regular communication with Team chair and Committee chairs
- **Attend** Team and Committee meetings
- **Bring** new information and ideas, new models, new opportunities (e.g., workshops, resources, individuals) to the Team's attention
- **Touch base** with people in the community, recruit them as volunteers, invite them to community meetings, update them on the Team's activities
- **Be a spokesperson** for PRC's agenda—help tell the Team's story and its progress, make the case for the Team's agenda, write press releases, do radio shows
- **Oversee** evaluation, track how things are working and raise a red flag if the Team is not achieving what it said it was going to achieve
- **Act** as the liaison with TDE, MDC, Chapin Hall and other PRC communities
- **Take care** of paperwork, invoices, bookkeeping, documentation, contracts, and other administrative matters
- **Coordinate** development of proposal and reports for TDE
- **Access** TA funds and be primary contact for MDC coach
- **Seek out** possible sources of funding and write grant proposals
- **Attend** Learning Cluster and Learning Gathering events

One team member referred to the Coordinator as both a leader and a manager. *“Being a leader means ignoring the background noise and staying focused on helping the group move forward.”* Being a manager is like being the “general contractor who manages the whole operation and then subcontracts to specialists for particular tasks.” The specialists may be a Committee working on an issue, a staff person in charge of a project, or a consultant contracted to carry out a specific task. “The Coordinator exerts quality control by making sure the tasks and outcomes are clear and then monitoring progress, making sure the Committee or the staff person reports to the Board every month.”

PRC Coordinator Competencies. Team members underscored the very wide range of skills that the ideal Coordinator would possess (see text box). The ability to juggle many moving parts and make sure things don't fall through the cracks is a key asset: *“A good coordinator is going*

to have more plates spinning than she can handle but know which ones she can let fall.” Similarly the Coordinator must be able to work with many different constituencies (e.g., politicians, bureaucrats, community activists, volunteers, funders, nonprofit leaders, etc.) in a focused, strategic, and culturally appropriate fashion. Few people have all these skills so each Team is challenged to identify a Coordinator who has skills that line up well with those of the Team and who is able to identify and utilize resources that will enhance the Team’s capacity.

Facilitating versus Doing. In some sites Coordinators have maintained a facilitation role and have not crossed into taking direct responsibility for project implementation (although in some cases projects were implemented by other program staff as will be discussed below). However, during the first year in **Beaufort, Far West and Northwest**, Coordinators found that they needed to “do” some “jump starting” of projects before they could take a more facilitative role. A Coordinator in **Marion** has recently assumed a similar role regarding its EITC program.

- PRC Coordinator Competencies**
- ✳ **Good people skills**
 - ✳ **Well organized**
 - ✳ **Good communication skills**
 - ✳ **Self-starter, proactive**
 - ✳ **Knowledge of the community**
 - ✳ **Knowledge of the field**
 - ✳ **Political acumen**
 - ✳ **Ability to stay focused but see the “big picture”**
 - ✳ **Collaboration/facilitation skills**
 - ✳ **Passion/heart for the work**

Sometimes the Coordinator needed to do a particular job for a period to understand what was entailed so she could then recruit others to take it over. In other cases, the Coordinator was simply the best (or the only one) positioned to oversee a project. For example, the **Northwest** Coordinator worked with a group of 8-10 entrepreneurs and organizations to create a Virtual Farmer’s Market showcasing indigenous products. The project proved to be more labor intensive than expected despite the hard work of everyone involved. The Coordinator has maintained her oversight role here to ensure quality control and make sure nothing falls between the cracks as the website is launched and new products are added. Another example comes from **Beaufort** where the Coordinator has taken on the responsibility for working with one of the municipalities in the county to develop and get funding for an IDA program. Once funded, the IDA program will be implemented by housing organizations in the community, some of which are members of the PRC team.

Doing and then Facilitating

The first year that the **Far West** Team undertook its EITC program, the Coordinator played a central role in implementing it, including doing a number of the tax returns herself. This year her role has evolved into recruiting volunteers (numbering about 30 including two for whom she did taxes the year before), coordinating their training and certification, developing publicity for the program and supervising a VISTA worker who will be providing backup onsite to make sure it runs smoothly. Even as she was beginning, the VISTA worker in turn began to look for a volunteer who would replace her in this backup role. In the third year, PRC staff anticipate that there will be even less required of them with respect to project implementation.

Coordinators report that the primary dangers of getting too engaged in implementation are two-fold: lack of time to fulfill all the facilitating and coordinating tasks required of the Coordinator; and decreased likelihood that the project will lead to lasting changes beyond specific project outcomes because others are not engaged. In addition, as one Coordinator noted, no matter how

effective she is, she is unlikely to have the same leverage or lend the same validation to a project as Team members collectively can, each of whom is well known and respected in different sectors throughout the county.

Keeping Team Members Engaged. One of the Coordinator's major tasks is keeping Team members engaged. These volunteers are generally very busy people, and burnout is a real danger for them, as is their temptation to turn over all the work to staff. To reduce the risk of either of these dangers, Coordinators found that they needed to reach out to individual Team and Committee members: *"I used to call board members all the time just to take their temperature, stay connected to what they are thinking. You have to nurture these relationships, which takes time but it's time well spent."* By understanding each volunteer's strengths and motivation for being involved in PRC, the Coordinator was better able to draw on these strengths and help create a situation in which both the volunteer's and PRC's needs could be met. Another Coordinator provided a similar example: in developing a relationship with one of her Team members, she learned that this individual had significant expertise in personnel policies and was able to help the Coordinator develop these policies for the Team.

One Coordinator noted the importance of making sure to recognize and give people credit and to communicate to each volunteer how important his or her contribution has been. Over time and with visible successes, the work can be self-reinforcing. But especially early on, when meetings seem interminable and results are not assured, the Coordinator often has to work hard to sustain consistent Team engagement. Another commented that she is very attentive to *"when you see energy fizzling out of a group how you need to go in and inject new energy . . . Energy is contagious so you really have to figure out how to stimulate it within your volunteers."*

Ideally, much of the Team's work can get done in the standing Committees. The reality at most sites, however, is that it took some time for Committees to be strong enough and clear enough about their roles to operate effectively. There are clear signs of progress in several sites, however, where Coordinators report that the Committees are becoming increasingly self-sufficient. The Committee chairs or members arrange meetings, set agendas, remind people of the meetings, take notes, and relay them to the Team (sometimes through the Coordinator). By taking more ownership of the work, the Team allows the Coordinator to serve more as a facilitator. This means the Coordinator can focus more on ensuring the connections are made across Committees and on stepping back and thinking about how to support and enhance their work more broadly. *"In the beginning, it didn't seem like there were a lot of ideas coming from the group. The group has more momentum now, more successes, seeing things accomplished. Now my role is becoming, 'How can I help you accomplish what you want to do?'"*

One Team Chair noted that although the team had taken on more activities and engaged additional staff, he did not anticipate reduced participation among Team members: *"I think they are straining and stretching to do even more because they see that we can have success. As long as it is working, there's no trouble keeping people engaged."* This experience contrasts with that in another site where a volunteer explained why she was limiting her involvement to a clearly defined role: *"I know if I jump in and do things, I'll be put in charge of the whole thing—I don't know if I want that . . . The Team needs to know that there is someone at the home base they can rely on."* In this case, staff has not been able to generate confidence among

the volunteers that a serious investment of time and energy will lead to concrete benefits. In turn, such lack of Team involvement in the work led the Coordinator in another site to feel uncomfortably responsible: *“The Team members are kind of committed to doing this, but it’s not clear how much everyone is enjoying this or getting something out of it. Overall, I still feel like it’s me dragging the ship.”* In some cases, lack of involvement on the part of Team members may be the result of lack of clarity about what is expected of them versus what they should expect of the Coordinator.

Challenges for PRC Coordinators. The role of Coordinator is inherently challenging. They are working with busy volunteers who are not accountable to the PRC; they are trying to maintain relationships and keep information flowing on Teams that are big and diverse; and they are overseeing an ambitious change agenda that touches many different people and systems. Some of the frustrations noted by Coordinators include:

- *“I spend way too much time trying to get hold of Team members and get timely responses from them”*
- *“I just wish there was more clarity about my role. We still don’t have job descriptions.”*
- *“I have a lot of responsibility but very little authority.”*
- *“A lot of times you feel like you’re just hanging out there by yourself. Thank God for my Option 1 peers . . . it’s nice to be able to vent with them.”*
- *“Anything that goes wrong, it’s me. Anything that goes right I have to (and I know it’s the right thing) give credit to the community.”*
- *“It is very hard to keep your finger on the pulse when so much is happening.”*

Despite these frustrations, most Coordinators report a sense of pride and excitement about what they have been able to accomplish with their Teams and what lies ahead. Several described working on the PRC as a tremendous career opportunity.

PRC Staff Role in Program Implementation

Although we have seen that Coordinators sometimes help to get a project up and running, assuming an ongoing program delivery function is inconsistent with serving a primarily facilitative role with the Team. So how does the program work get done in Option 1 sites? One vehicle is through staff who are supported by PRC funds to implement specific projects. The following chart describes the staffing arrangements currently undertaken in Option 1 sites.

As the chart indicates, some PRC sites have identified staff for specific project goals: affordable housing, workforce development, IDA program development, cluster economic development, and small business development. Some of these staff are based in the PRC host organization, others are located at another appropriate institution in the community such as the community college or another nonprofit.

PRC STAFFING CHART

	Program Coordinator		Project Staff			
	Name	% Time	Name	% Time Funded by PRC	Focus	Employer
Beaufort	Bianca Gentile	100%	Peyton Morris	50%	Administration/Job Training	PRC
			(To Be Selected)	40%*	Housing	PRC/Metropolitan CDC
			(To Be Selected)	30%	Community Engagement	PRC
Far West	Kelly Long	100%	Charles Penland	100%**	Housing	PRC/Hinton Center
			Kendy Sawyer	100%**	VISTA	PRC/Hinton Center
			Lois Griffin	100%**	VISTA	PRC/Hinton Center
			Penny Hane	20%	Admin. Support	PRC/Hinton Center
LO/UD	Kim Sturgeon	30%	Garon Jackson	100%	Program Recruitment & Case Management	PRC
Marion	Howard Garland	20%				
	Rick Morrison	50%				
Northwest	Melanie Young	100%	Bud Hill	100%	IDA Program	PRC/Family Central
			John Hauser	100%	Cluster Development	PRC/Wilkes Comm College
Randolph	Janet Hughes	100%	Lee Hudgens	100%	Small Business	PRC/Randolph Comm Coll
Vance	Marolyn Rasheed	80%				

NB: Different PRC Program and Project staff have worked for different periods over the last year. The figures in this table describe staff allocations as of 4/1/04.

*This full-time position will be shared between PRC and Metropolitan CDC.

** These staff are supported by non-PRC funds.

If PRC-funded staff actually work for other organizations, how do they stay connected to the PRC Team's goals and values? In the **Northwest** site, although the two project staff people have reporting relationships in the organizations for which they work (i.e., Family Central and Wilkes Community College), both of them have actually joined the **Northwest Alliance PRC** Board and thus have a built-in vehicle for reporting on their projects to the Board and getting their feedback. Another mechanism for keeping project staff closely aligned with the PRC Team, as well as to conserve resources, is to share a position with another organization. For example, the **Beaufort** Team plans to share the salary of a part-time housing outreach coordinator with Metropolitan CDC, an organizational member of BCPRC. Both Metropolitan and BCPRC staff will supervise this person. In **Randolph**, the project staff working on small business development is housed at the community college, which is represented on the RPRC by the community college president. This staff person provides the RPRC with information about his work through the RPRC Coordinator and through occasional presentations to the RPR. Although three of the four project staff people from the Far West Team are supported with non-PRC funds, they all are based at the Hinton Center with the Project Coordinator so that communication among them is facilitated.

As with the Coordinator, one potential drawback of relying too heavily on project staff is not using the project as another opportunity to draw in an ever-widening circle of people and organizational partners to the community change effort. One way to address this drawback is to do what several sites have done, rely heavily on broad community advisory committees to help guide the project work undertaken by staff. Both the **Northwest** staff people, described above, have constituted advisory committees to strategically engage others in their projects. Similarly, the housing staff person in the **Far West** has organized county-level housing action teams that will actually carry out the work.

Other PRC Strategies for Carrying Out the Work

Although the focus of this Working Memorandum is on staff, PRC Teams use a range of other strategies for carrying out their agendas. In order to provide a context for the staffing discussion above, we review these strategies here: using consultants, partnering with other organizations in the community, involving a broad range of community members on PRC Committees or Subcommittees, and engaging individual team members in the context of their own organizations.

Consultants. Some tasks require specialized expertise, which neither the staff nor Team members may have or have time to devote to PRC. In this case, sites have often used consultants, sometimes for short-term tasks and sometimes in a longer-term or more substantial fashion. **Far West**, for example, has an ongoing relationship with a consultant who is a housing specialist who provides advice to staff in that area and also helps write grant proposals for the Team. **Team Vance** has a substantial contract with Market Street Services, a national community development consulting firm, to support an economic development strategic planning process. The **Marion** Team has contracted with a consultant to work with the Marion County Progress and Economic Development Board to lay the groundwork for hiring an industry retention specialist to head up the Team's Industry Retention work.

Organizational Partnerships. Another way in which the PRC agenda gets implemented is through partnerships—sometimes involving PRC resources—with other community organizations such as the community college, the Chamber of Commerce, the NAACP, AARP, etc. The **Northwest** Team provided some funds to the Chamber in Ashe County to restart its Leadership program with particular attention to new and emerging leaders in the County. As part of its financial literacy program, Marion County NAACP’s vice chair has been working with one of **MCCAN’s** Coordinators to design, implement, and coordinate volunteers for the EITC program. The **Beaufort** County team’s EITC program is being conducted in sites of team member organizations, and the actual tax preparation will be done by volunteers from the AARP. Similarly, **LO/UD–Shady Grove** intends to partner with AARP on providing education to the community about the EITC, as well as eventually providing tax preparation services. These partnerships extend and deepen the Team’s reach without significant expenditure of resources.

Team-Community Committees. All the PRC Teams have a program committee structure through which much work is planned and implemented. Sometimes these Committees involve a broad range of community members to help flesh out the strategies and actually implement the Team’s goals. For example, **Beaufort’s** Small Business Subcommittee is made up of people from the business community, the small business development center, and nonprofits that support the development of small businesses in the community. The collaborating partners are currently planning a small business fair, and some have even contributed funds to carry it out. In **LO/UD-Shady Grove**, the Pre-Manufacturing Training Subcommittee involved a number of people from the business and industry sectors on the subcommittee. Other examples of similar committees, on which non-Team members are highly represented, include the **Far West’s** Heritage Tourism Roundtable, **Northwest’s** Leadership Committee, **Marion’s** Workforce Alliance Subcommittee, and **Randolph’s** focus group initiative.

Individual Team Members. Finally, and consistent with PRC’s emphasis on the critical role of the Team in community change, members of the Team can agree to take on a PRC task *as part of their existing jobs*. Some examples include the following:

- A member of the **Northwest Team** works for Healthy Carolinians and in that capacity helped to start a Latino Center that contributed to the Team’s outreach and leadership development goals.
- The Chair of **LO/UD-Shady Grove’s** job training committee is also responsible for training at a community college, including the Certified Nursing Assistant training he helped the LO/UD–Shady Grove committee to develop.
- A member of the **Randolph Team** took leadership on organizing 10 focus groups to gain a better understanding of those affected by a declining economy. This activity met both PRC’s goals and those of the Partnership for Children, where the Team member works.
- A member of the **Randolph Team** who works for the Economic Development Commission produced, with the Assessment and Inventory subcommittee, a Targeted Industry Study which assesses the characteristics of the economically challenged labor force in order to develop an integrated plan for industry recruitment, job training, and job placement.
- A Team member in **Far West** chairs the Small Scale Agriculture committee, a task that is consistent with her work at the NC Department of Agriculture & Consumer Services.

- A member of **Team Vance** with real estate development expertise worked with a community-based credit counseling service as one component of the Team’s housing program.

Looking Forward

PRC Teams have limited financial resources to carry out ambitious agendas. And they want to accomplish specific program goals in such areas as job training, affordable housing, or marketing regional products in the “PRC” way –by bringing the community into the process of defining, designing, and implementing the Team’s agenda. The belief is that such an approach can stretch limited resources, maximize community ownership, and contribute to the larger process of community change.

The Coordinator plays a vital role in facilitating coordination, making connections within and outside the Team, and sustaining the pace and momentum of its work. In helping the Team choose the means through which its different goals are implemented, the Coordinator is challenged to consider the implications of these choices. For example,

- If a staff person is hired, how can the position be structured and carried out so that it adds value above and beyond the tangible results that are the focus of the job? In other words, how can other people and organizations be involved in the work so that the staff position creates enduring community capacity as well as short-term program results?
- Similarly, are there opportunities for engaging, involving and building the capacity of the community if a consultant carries out the work?
- How can community partnerships be identified and leveraged so that PRC-initiated work can influence and/or involve other key community players, with the goal of sustainability over the long run?
- Is the way in which the work is being carried out, by staff or by other means, contributing to the PRC’s goal of establishing a continuing partnership that is representative of the community and works together to strengthen the local economy?

**The Duke Endowment
Program for the Rural Carolinas
Participants**

The Duke Endowment Beneficiary	Program Name/Summary	Participating Years
Option 1 Programs		
Greenville District United Methodist Church	<p style="text-align: center;">Beaufort County Program for the Rural Carolinas Beaufort County, NC</p> <p>Affordable housing, IDAs¹ and an EITC² programs; small business development; and raising income levels through education and training.</p>	2002-2006
Hinton Rural Life Center	<p style="text-align: center;">Far West Mountain Economic Partners Cherokee, Clay, Graham & Swain Counties, NC</p> <p>Heritage tourism, small-scale agriculture, and affordable housing.</p>	2002-2006
Maria Parham Hospital	<p style="text-align: center;">TEAM VANCE Vance County, NC</p> <p>Reducing disparity between available jobs and unemployed people with skills. Identify key growth sectors. Affordable home-ownership. Connecting unemployed with jobs that have a career path towards a sustainable wage.</p>	2002-2006
Marion County Medical Center	<p style="text-align: center;">Marion County Collaborative Action Network Marion County, SC</p> <p>Industry retention through improved productivity increasing employment, the expansion of existing and development of new sectors, and increasing income and wealth of the left-behind.</p>	2002-2005
North Wilkesboro District United Methodist Church	<p style="text-align: center;">Northwest Alliance Program for the Rural Carolinas Alleghany, Ashe & Wilkes Counties, NC</p> <p>Leadership, marketing, program development, and entrepreneurial development.</p>	2002-2006
Randolph Hospital	<p style="text-align: center;">Randolph Program for the Rural Carolinas Randolph County, NC</p> <p>Goals are directed at increasing employment and wealth.</p>	2002-2006

¹ IDA is an individual development account for savings to purchase a first home, pursue job training or capitalize a small business.

² EITC is an earned individual tax credit that people of low wealth may use to reduce and individual's taxes. The reduction may be returned in the form of a refund.

The Duke Endowment Beneficiary	Program Name/Summary	Participating Years
Shady Grove United Methodist Church	Shady Grove Program for the Rural Carolinas (LO/UD) Lower Orangeburg & Upper Dorchester Counties, SC Increasing the employment income, financial literacy, and wealth of people left-behind.	2002-2006
Option 2 Programs		
Allendale County Hospital	Helping Hands Allendale County, SC Develop viable health care training programs and trustworthy communication links for the left-behind.	2002-2006
Calvary Memorial United Methodist Church	Contentnea Development Partnership Greene County, NC Employment business development, wealth building through EITC and homeownership. Increasing public awareness of economic development issues.	2002-2005
Columbus County Hospital	Discover Columbus Columbus County, NC Eco-tourism / Agri-tourism, Agri-business, and Leadership Development.	2002-2006
Duncan Memorial Untied Methodist Church	"Project Reach" ² Georgetown, SC Goals are to improve housing conditions while simultaneously providing job skill training for youth.	2002-2004
Hildebran United Methodist Church	East Burke Learning Alliance Burke County, NC Involve existing business and industry in creating employment opportunities; increase the involvement of the left-behind and access to distant markets, people, and educational opportunities through public Internet sites.	2002-2006
Hot Springs Health Center	Madison PRC Madison County, NC Increase the incomes of local farmers and craftsmen/artists and build the leadership and infrastructure that will sustain the increased income.	2002-2006
Hyde County Cooperative Parish (United Methodist Church)	Hyde County Program for the Rural Carolinas Hyde County, NC Supporting development of the Hyde-Davis Business Enterprise Center; developing a plan for the Machapungo Park Project ³ ; and providing a framework for economic development, leadership training, and team building for the team.	2002-2005

³ The Machapungo Park Project showcases the history and cultural heritage of Native American, European settlers and Civil War-era residents.

The Duke Endowment Beneficiary	Program Name/Summary	Participating Years
Isaiah United Methodist Church	<p style="text-align: center;">CAN Program/The Collaborative Colleton County, SC</p> <p>Increasing employment and wealth through IDA program.</p>	2002-2006
Onslow Memorial Hospital	<p style="text-align: center;">Onslow PRC Onslow County, NC</p> <p>Assessing the needs of the left-behind, improving their financial literacy, and building their wealth through the establishment of EITC and IDA programs.</p>	2002-2006
Pender Memorial Hospital	<p style="text-align: center;">Pender Rural Economic Development Task Pender County, NC</p> <p>Complete a comprehensive needs assessment showing key demographic and economic issues, and development of a plan for implementing the new ideas identified by these studies.</p>	2002-2006
Pilmoor United Methodist Church	<p style="text-align: center;">Steps-to-Success Camden & Currituck Counties, NC</p> <p>Develop jobs, provide life skills training and mentor the left-behind. Create sustainable non-seasonal employment opportunities for coastal area citizens.</p>	2002-2005
Pinetop United Methodist Church	<p style="text-align: center;">Pinetops PRC Edgecombe County, NC</p> <p>Creating a new economic environment that provides new opportunities for employment and asset building through business development and growth.</p>	2002-2004
Roanoke Chowan Hospital	<p style="text-align: center;">Roanoke-Chowan PRC Bertie, Gates, Hertford & Northampton Counties, NC</p> <p>Workforce development and increasing employment.</p>	2003-2005
Snow Hill United Methodist Church	<p style="text-align: center;">Stokes PRC Stokes County, NC</p> <p>Support local farmers and foster workforce development.</p>	2002-2006
The Rockingham District United Methodist Church	<p style="text-align: center;">The Robeson County Program for the Rural Carolinas Robeson County, NC</p> <p>Develop a countywide CDC to help team achieve wealth building through home ownership, small farm and agricultural development, small businesses, and create a plan for the long-term sustainability.</p>	2002-2005

**The Duke Endowment
Program for the Rural Carolinas
Working Memoranda Topics**

Constituting Effective Teams for Rural Development in the PRC (November 2003)

This memorandum reviews the rationale for the central role of collaborative teams in PRC's design and then examines the composition and structure of the newly constituted teams. Although teams differ considerably in their composition, most are relatively diverse by race and background but less so by class and age. The memorandum reviews the committee and governance structure each team has put in place to help it make decisions, allocate resources, and carry out the work. Even this early in PRC's implementation, about half of the teams are considering incorporating as a new nonprofit organization as a possible way to institutionalize the change process at the end of PRC. Teams also face the challenge of how to deploy staff effectively so that team members neither burn out nor reduce their much-needed engagement.

Doing Development Differently: Innovation and Learning in the PRC (November 2003)

The focus of this memorandum is on two challenges teams face as they translate new ideas about economic renewal into operational realities. First, how do they innovate without starting a large number of new programs that may neither maximize the use of existing community resources nor generate long-term support for sustainability? The memorandum describes how the teams are catalyzing innovation by creating and brokering partnerships and by strengthening the capacity of existing organizations to implement new programs. Second, how do teams build learning and evaluation into implementation in a way that enables them to reflect upon and refine their strategies as part of ongoing practice? Given implementation challenges, teams often have trouble finding the time to engage in iterative cycles of intentional learning, planning, doing, and evaluation that could improve their work.

The Role of the Duke Endowment's Eligible Institutions in the PRC (November 2003)

The rural Methodist churches and rural nonprofit hospitals that serve as team members and fiscal agents for PRC in each site face a number of challenges in PRC. They are expected to be leaders but not to be in charge, to produce results but to share that responsibility and credit with a range of other community partners, and to institutionalize the change process but not necessarily within their own structures. This memorandum examines what assets these churches and hospitals bring to PRC and how they have addressed the challenges inherent in their new roles. The potential for other rural churches and hospitals to develop increasing interest in playing leadership roles in promoting their community's economic renewal is also addressed.

Managing and Implementing the PRC: The Role of Staff (May 2004)

This memorandum reviews the role of staff in supporting the work of the PRC teams. It describes the central role of the project coordinator in facilitating, coordinating, and communicating; keeping team members engaged; and sustaining the pace and momentum of the work. What the coordinator and project staff actually do depends in part on what tasks the team members are willing and able to take on and what additional vehicles the team can create or

access for carrying out the work—such as using consultants, partnering with other organizations, or involving community members on PRC committees or task forces. The memorandum challenges teams to use staff and other vehicles to implement their agendas in ways that both produce program results and build enduring community capacity and support for a continuing partnership.

Leadership Development in the PRC (December 2004)

This memorandum examines the different ways that teams have tried to identify and cultivate a cadre of people who are committed to working on behalf of PRC's goals. Potential leadership can come from PRC team members, as well as from diverse sectors of the community: ordinary citizens who express an interest in community improvement, traditional power brokers, people who work in organizations and agencies that serve the disadvantaged, and people left behind by the economy. All of these different kinds of citizens are necessary constituents of a long-term partnership to advance and sustain PRC's goals over time. But diverse strategies are needed to identify, engage, and develop these different leaders. The memorandum reviews both the formal and informal ways that the teams have fostered leadership and challenges teams to develop ways of monitoring the success of these efforts.

Public Sector Involvement in the PRC (December 2004)

The focus of this memorandum is on the different ways in which the teams have approached the complexities of engaging the public sector, both elected officials and those who work for various government departments or offices at the municipal and county level. Clearly, teams cannot ignore the public sector and still access the resources and achieve the changes that are required for local economic renewal. But the timing and nature of the relationship involve strategic challenges, which teams have addressed in quite different ways with different results. The memorandum reviews the progress teams have made in garnering public support for their agendas, as well as for changing public sector policies to be more supportive of the interests of people left behind by the economy.

The Role of the Church in the PRC (May 2005)

This memorandum examines the experience of the eleven Endowment-eligible rural United Methodist Churches or church-related entities that are participating in PRC. The focus is on the role church leaders and their UMC institutions have played in PRC and the impact of PRC on these institutions. Overall, the churches—like their rural hospital counterparts—have been successful intermediaries and effective fiscal agents. In turn, PRC has had a positive impact on their reputations in the community and their capacities as community partners. Few of the churches, however, have engaged their membership in PRC in a substantial way. The memorandum outlines why this has been the case and summarizes the emerging tools and strategies that UMC leadership is testing to get the laity involved in order to provide continuity and sustain the long-term commitment of the church to PRC's interests.

The Role of the Hospital in the PRC (September 2005)

This memorandum examines the experience of the nine Endowment-eligible rural hospitals or health entities participating in PRC. The focus is on the role hospital executives and their institutions have played in PRC and the impact of PRC on these institutions. Overall, the rural hospitals—like their United Methodist Church counterparts—have been successful

intermediaries and effective fiscal agents. Despite increasing fiscal constraints, the hospitals have been able to draw upon their long history in the community, their stable leadership, and their close relationships to local business to help facilitate a broad community change agenda. As major employers, they have understood PRC's potential to address local workforce needs. A key question for these hospitals has been how much to engage their boards and embrace PRC as part of their core business. The memorandum ends with a strategic framework for leveraging health institution assets for community economic revitalization.

Managing and Supporting PRC (February 2006)

This memorandum examines the management and provision of support to PRC with an eye toward drawing lessons for other foundations, intermediaries and nonprofits considering similar multi-year, multi-site initiatives. As PRC's intermediary, MDC provided a rich and diverse portfolio of supports, such as coaching, cross-site meetings, and access to a technical assistance pool, that were intended to convey information, inspire, challenge, facilitate and connect sites to additional resources. For the most part, these supports complemented the Endowment's unique relationship with its beneficiaries. Both MDC and the Endowment report that it would have been useful to develop additional clarity at PRC's inception regarding how success in PRC was to be defined, measured and reported. Further, both organizations would have benefited from more structured opportunities for mutual reflection and learning about how the ideas behind PRC were playing out in practice.