PROGRAM FOR THE
**Rural
Carolinas**

Managing and Supporting
the Program for the Rural Carolinas

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

on behalf of The Duke Endowment

February 2006

Established in 1924 by North Carolina industrialist and philanthropist James Buchanan Duke, The Duke Endowment is a private foundation that serves the people of North Carolina and South Carolina by supporting selected programs of higher education, health care, children's welfare, and spiritual life.

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Table of Contents

Managing and Supporting the
Program for the Rural Carolinas

Appendix

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.   Toni L. Freeman
President   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 Supporting
the Program for the Rural Carolinas
February 2006

Introduction

Managing and supporting a complex, multi-site community-change initiative like the Program for the Rural Carolinas (PRC) presents many challenges. PRC asks communities to function in new ways to produce concrete outcomes for those most in need, people left behind by the economy. Further, it asks them to produce these outcomes through an inclusive and collaborative process that builds new community partnerships, new organizational capacities and new leadership. Finally PRC aims to work 1) at an unprecedented scale in 23 (now 20) diverse communities in two states; 2) within the relatively short time frame of three and one-half years; and 3) through collaborative structures led by rural Methodist churches and rural hospitals, Endowment-eligible institutions whose primary business is not economic development. Each of these design features conditions the nature of support that sites need to accomplish their goals.

This Working Memorandum examines the management and provision of support to PRC with an eye toward drawing lessons for other foundations, intermediaries and nonprofits considering similar ventures. It is based on 40 interviews with staff of The Duke Endowment (TDE) and MDC, with PRC's coaches, and with representatives from all the Option 1 and 2 sites. The site interviews were conducted with the individual who is MDC's primary contact—the team's staff person, chair or church or hospital representative. In several cases, more than one individual was interviewed, sometimes because of team staff or chair turnover. Chapin Hall's periodic site visits since PRC's inception generated additional observations for the Memorandum.

The Memorandum is organized into four parts. Part 1 examines TDE's use of an intermediary to manage and support PRC. Part 2 describes the different supports MDC provided to the sites, focusing primarily on the value added by the technical assistance pool, the cross-site learning events and coaching. Part 3 addresses the management and support implications of some key features of PRC's design. Part 4 explores lessons for future initiatives. Like previous Working Memoranda, this one is written while PRC is still unfolding and, therefore, does not represent the "final word" from PRC on this topic.

Part 1: The Foundation-Intermediary Relationship

When a foundation decides to mount a multi-year, multi-site initiative, among the many questions it must address is how to manage it—internally, externally, or through some combination of both strategies. In the case of PRC, TDE hired an intermediary, MDC, to manage and support the initiative. Because of the Foundation's unique and often long-term relationships with its eligible institutions, as well as its desire to stay engaged in PRC, TDE and MDC forged a new partnership to co-manage the initiative.

◈ Why did TDE decide to use an intermediary and why MDC?

TDE was clear from the beginning that this was a completely new area of work for the Foundation and their eligible institutions. The design of the program asked the eligible institutions to engage in the important but unfamiliar work of community economic development and to bring in large numbers of new collaborative community partners. Foundation staff did not have the economic development expertise needed to assist teams or the time required to manage such a large and complex initiative. MDC, on the other hand, was well suited for the task. With a strong track record as an intermediary, it had managed other multi-site initiatives, it had worked on the economic problems facing the south, and it had assisted communities in developing the leadership and the strategies for solving their problems. Further, MDC had done a small piece of work for TDE some years earlier and was well regarded by the Foundation, so its selection for PRC made sense to everyone involved.

◈ What mutual expectations were established regarding MDC and TDE's respective roles and responsibilities? How clear were they? How did they evolve over time?

TDE and MDC began with a broad understanding of MDC's substantive and administrative tasks as an intermediary, and a commitment to learn together, but many of the specifics were not spelled out initially and, instead, evolved over time. Because PRC involved sites from both the Health Care and Rural Church Divisions, TDE created a new management structure for the program, with the Endowment's communications officer providing primary liaison work with MDC and the two program divisions. During the first year, TDE program division staff took a relatively "hands-off" approach. Pressed by their existing grantmaking responsibilities, program staff largely deferred to the communications officer to help administer the Endowment's relationship with MDC and the initiative more broadly. This, plus the involvement of MDC as intermediary, led some program staff to be less directly involved in the work, with the unintended consequence that they "*didn't feel a real sense of responsibility or ownership for what was going on because we really weren't very involved.*" One member of the Endowment staff observed that we sometimes felt "*locked out of our own projects.*"

Two main factors led to a more engaged stance toward PRC during its second year. First was the Foundation's longstanding relationships with its beneficiaries: "*our culture is 'hands on.' We know who these grantees are and we are not so comfortable letting an intermediary do the work.*" A second reason why TDE shifted its stance was that staff felt a need to know more about what was happening on the ground so they could communicate more effectively with the trustees about PRC's progress and challenges. As one staff person noted, "*the responsibility for communicating with our board is really ours, we know the language that they understand.*"

To develop this critical knowledge, starting in year 2, staff were assigned to each site, visited at least annually, sometimes with a MDC coach, and consulted with the site and MDC staff as needed. Additionally, the Endowment's management structure for PRC was broadened to include two senior staff with significant grantmaking and evaluation experience. This new arrangement helped to reinforce program staff's engagement and foster more communication about the initiative both within the Foundation and with MDC. TDE also hosted a meeting with MDC and Chapin Hall staff to reflect together on PRC's ideas and on-the-ground experience midway through the initiative.

Other changes at the Endowment affected the context in which PRC evolved: the Board lost PRC's initial champion; there was a transition in the Foundation's leadership; the Health Care Division acquired a new Director and recruited a new staff person; and the Church Division lost one of its two program staff. Such changes are inevitable in multi-year initiatives, but did require the Foundation and the MDC to develop some new working relationships and to make sure there was a shared understanding about PRC's goals and operation.

Although some expectations for how a foundation and an intermediary work together necessarily evolve from the experience itself, both TDE and MDC staff cite two areas in which greater clarity about expectations would have been useful from the beginning:

Reporting—TDE has "*very structured reporting practices, and there's a particular language that we use in communicating with each other and our board.*" These practices were not communicated clearly to MDC at the outset. It therefore took some time for TDE and MDC to work out the format and frequency of MDC's reports so that TDE could get the information it needed on the timeline it preferred. The lack of a standard format and consistent expectations for reporting also had negative repercussions for the teams, many of whom complained that they spent too much time pulling together data that needed to be presented in a new way each year.

Specification of outcomes—The lack of in-depth discussion between TDE and MDC staff about what constituted success within each of PRC's broad goals meant that important differences in perspective, both within and across the two organizations, were never surfaced early in the initiative. Foundation staff suggest that such a discussion might have addressed how PRC's success would be defined, measured, and reported in specific terms including the relative balance of quantitative and capacity building (process) outcomes. Increased clarity between TDE and MDC on this front would have also benefited the teams as they made their choices about how to spend their limited time and resources.

◆ **How did TDE's long-term relationships with its beneficiaries affect PRC's experience with an intermediary**?

Inserting an intermediary into TDE's unique relationships with PRC churches and hospitals creates a potentially unsettling situation for all three parties—TDE, MDC and the beneficiaries— that requires everyone to act in new ways. What has been remarkable in PRC is that each party has found a way to manage these new relationships in a productive fashion. Respondents attribute this success to direct and open communication among the parties that developed over time. By sometimes visiting sites together, TDE and MDC communicated that they were "on the same team." When teams had problems or concerns, both TDE and MDC staff were likely to become engaged. Sometimes sites were wary of MDC's judgments, and sometimes TDE would have liked MDC to communicate with staff more quickly about problems in the field. But overall, TDE, MDC and the sites reported fundamentally sound relationships that formed a good foundation for their work together.

From the sites' perspective, respondents from Duke-eligible churches and hospitals for the most part describe their relationships with the Foundation as strengthened through PRC. Sometimes, however, other members of the teams and those who staff the teams would have liked more

direct contact with the Foundation. "*We found that everything had to go through MDC, that they had to be the filter on everything.*" This was especially troublesome to the few churches that had no previous relationship with TDE and to those teams that had formed a nonprofit separate from the Duke-eligible church or hospital; both were concerned about their future grant prospects at the Foundation.

Part 2: PRC's Supports

◈ **What range of supports did MDC provide to the PRC teams?**

MDC offered a rich and diverse portfolio of supports for the teams at different phases in PRC's evolution:

- Technical assistance--funds for specialized assistance through consultants, training programs or travel opportunities
- Cross-site learning opportunities--meetings to promote peer learning and expose sites to new knowledge and team-building opportunities
- Coaching--individualized assistance and support
- Vision to Action training--early strategic planning assistance
- Data packages--compilations of existing demographic data
- Program News Memos--periodic communications with news of site developments, reports, upcoming conferences, etc.
- Economic Development phone calls--series of phone sessions with guests on different economic development issues
- Fund$earch Newsletter--information about funding opportunities and strategies
- Periodic e-mails highlighting important articles, resources, and opportunities

This wide array of vehicles was intended to convey information, inspire, challenge, facilitate, and connect sites to resources that would help them meet their PRC goals. In many cases, MDC asked for feedback about the utility of a particular vehicle—how should the next Learning Institute be different based on feedback about this one, how valuable is the Fund$earch Newsletter from the team's perspective? MDC was constantly challenged to allocate its limited resources, especially staff time, in a way that would most effectively move PRC forward.

We focus here on four of the most significant supports provided by MDC: the TA pool, the annual Learning Institutes, the Learning Cluster meetings, and coaching. The following pie chart illustrates how MDC resources were allocated across these supports, with coaching being by far the largest recipient.

PRC Support Allocations[1]

Learning Institutes 10%

Learning Clusters 6%

TA Pool 15%

Coaching 69%
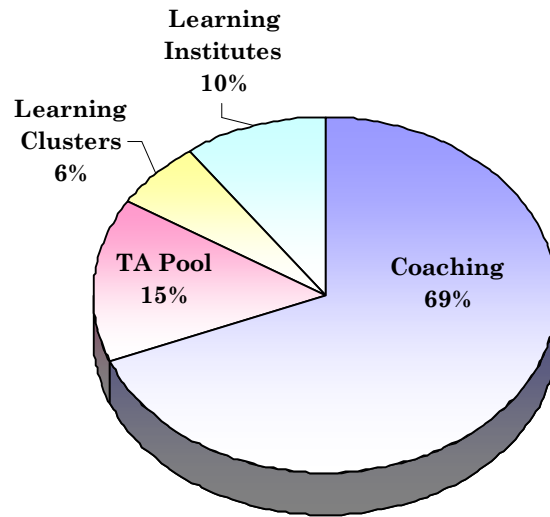
[1]Administration is factored into each of these allocations.

◆ **How did the sites value the different supports provided by MDC?**

The sites' assessments of each of the four major supports are reported in Table 1. This is followed by a description of each support and an analysis of the site responses.

Table 1: Site Assessment of PRC Supports

	Very Useful		Useful		A Little Useful		Not Useful	
	Total	*%*	Total	*%*	Total	*%*	Total	*%*
TA Pool*	**11**	*65%*	**5**	*29%*	**0**	*0%*	**1**	*6%*
Option 1	4	*57%*	3	*43%*	0	*0%*	0	*0%*
Option 2	7	*70%*	2	*20%*	0	*0%*	1	*10%*
Learning Institutes	**10**	*50%*	**6**	*30%*	**4**	*20%*	**0**	*0%*
Option 1	2	*29%*	2	*29%*	3	*43%*	0	*0%*
Option 2	8	*62%*	4	*31%*	1	*8%*	0	*0%*
Learning Clusters*	**3**	*17%*	**13**	*72%*	**2**	*11%*	**0**	*0%*
Option 1	0	*0%*	6	*86%*	1	*14%*	0	*0%*
Option 2	3	*27%*	7	*64%*	1	*9%*	0	*0%*
Coaching	**10**	*50%*	**7**	*35%*	**3**	*15%*	**0**	*0%*
Option 1	2	*29%*	4	*57%*	1	*14%*	0	*0%*
Option 2	8	*62%*	3	*23%*	2	*15%*	0	*0%*

* The total number rating this PRC support does not add up to the total number of sites (20) because some sites did not avail themselves of this support or, in the case of the Learning Clusters, the respondent was unaware of his or her site's participation.

TA Pool

Understanding the challenging and potentially overwhelming nature of the work before the PRC sites, MDC created a technical assistance (TA) pool that enabled sites to access a wide variety of specialized supports including consultation from program experts, meeting facilitators and grantwriters, travel funds to visit other community change efforts or attend conferences, money for studies and materials, etc. MDC divided the funds between Option 1s and 2s, and instituted an application process to guide their distribution. Though often underutilized, particularly by Option 2s, when teams received TA Pool funding, they were generally very pleased with the outcome: 94 percent of those that used the funds found them very useful or useful. Some of the specific comments offered by the sites included:
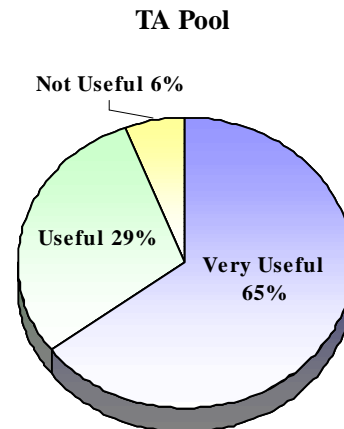
◆ *"It was a way to access something, in the case of the Coalition meeting, that really wasn't quite in the budget. It provided us the ability and incentive to attend."*

◆ *"The TA pool provided excellent resources without us having to do the credentialing, which saves us time and money… keeps us from potentially getting / contracting for someone who is not legit."*

◆ *The services were offered in a very professional and effective manner. The seminars that we attended were very germane to our obtaining knowledge about IDA and EITC programs.*

There were varying opinions, however, concerning the TA pool's application process. While one site described an effortless experience, *"Right from the beginning, when we applied for the money. It was just smooth sailing. Everything was done in a timely manner. We went to Arkansas… sent the forms upon our return and we were reimbursed. It was a hassle free process,"* others more frequently cited problems surrounding the clarity and communication of the pool's administration. According to one site, *"It was sometimes difficult to access. We couldn't figure out what we could and couldn't use it for. That may not have been MDC's fault though; maybe it's just the nature of the beast."* Others suggested that many of the snags in the process could have been remedied by (1) the creation, development and adherence to a 'TA Plan' by each site and (2) more specificity on MDC's part regarding their expectations about exactly what needed to be included in the application. The point is illustrated by one site's comment that, *"I just found that it must have been the way MDC obviously had words that they were looking for and I don't think all sites including us are so savvy that we know all the correct lingo and those words for today. So that was just frustrating because I would put in a request for TA, and it would come back."* Conscious of this issue, one site coach stated, *"If you don't have the coaching support with the TA Pool, people just don't really understand how to get the money, why it's an important resource, and how it all gets brokered."*

Learning Institutes

PRC's annual Institutes aimed to facilitate team building, promote cross-site learning, and expose sites to the latest thinking and information in order to bolster their efforts to realize PRC's goals. Site interviews illustrate that these gatherings were generally well received, with 16 of 20 sites (80%) finding them either "useful" or "very useful." Sites very much appreciated the fact that MDC "*brought in exceptional experts to share information, from both a motivational/inspirational standpoint, as well as a strong technical standpoint.*"

A Little Useful 20%
Very Useful 50%
Useful 30%
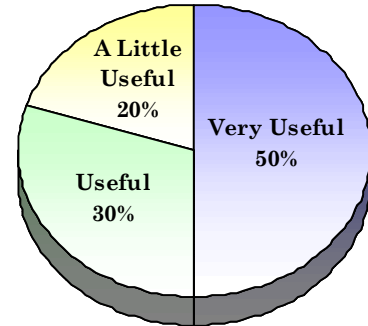
All parties generally agree that the within and between team networking that occurred during the Learning Institutes was invaluable. In the words of one site, *"We're a very fragmented county… the events fostered collaboration. We got to know our team members better, which was beneficial. Additionally, we got to network with the other sites… it was great just to be around kindred spirits… to realize that we weren't the only ones bumbling."* Opinions vary regarding whether the Learning Institutes lived up to their goal of fostering peer learning, however. By and large, sites blamed crammed scheduling for many of the shortcomings of the Institutes. Regarding the schedule, one site stated, *"…it didn't allow a lot of time for the groups to work together and even when we did, we were just so rushed that I didn't think it was helpful and then on the flip side of that there wasn't enough cross team contact so I didn't think we had enough time to learn from each other and from others. So, I just found all of them very frustrating."* During the initial Institutes, team building seemed to supplant peer learning as the primary goal, perhaps a consequence of PRC's brief planning phase. One MDC staff member both marveled and lamented at this development when he stated that, "*This was an unexpected opportunity from my perspective; I had thought that they already knew one another, but that wasn't necessarily the case. If this was a longer project, we might be able to get to my bigger goals of cross-team networking and peer learning, but in this short amount of time, teams have needed to get to know one another."*

In contrast to the Learning Clusters, the Learning Institutes focused for the most part on the big picture program goals. As the only venue in which all the sites were together in the same place each year, they aimed to keep participants focused on PRC's overall goals and approach. One consequence is that sites tended to see them as less useful in terms of applying the knowledge acquired to practice. One coach questioned sites' ability to move from information to implementation, "The way we structured them early on, they were so jam packed with wonderful information. It's like we brought the people in, lifted the tops off their skulls, poured the information and knowledge in, and then sent them off. This approach is limited in that I don't know how much it has translated into new action back at home." Another coach noted that "The intentionality that goes into planning the Institutes doesn't extend to implementation."

Finally, the Learning Institutes, as well as the Learning Clusters, were held in varying geographic locales across the PRC region in order to ease team's travel burden. Yet, distance still proved problematic for both kinds of cross-site meetings and eventually became an issue affecting attendance for many teams whose volunteers simply couldn't take what sometimes amounted to two-to-three days time off to participate.

Learning Clusters

Learning Clusters
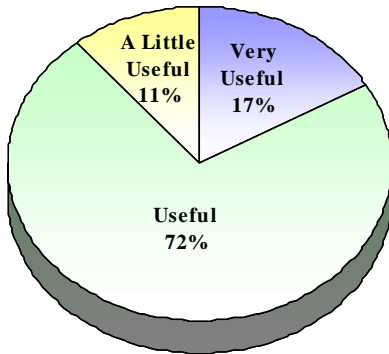
With a narrower objective than the annual Learning Institutes, PRC's periodic Learning Cluster meetings addressed specific programmatic issues such as community engagement, small business development, sector development, and sustainability, to name a few. Among respondents who participated in the Clusters, 89% (16 of 18 sites) found them either "useful" or "very useful." One site respondent's comment expresses the general sentiment regarding the Clusters, *"We had more time to work with our own group and we also had more time to learn from other groups, teams. We got most of our benefit from talking amongst each other and talking to other teams to hear what they were doing and the problems they were having and how they had been successful. And they were much more focused so you were able to get the right people to the right learning session."*

In addition to the advantage of being able to go deeper on one particular topic, participants really appreciated the advantages of a small-group setting: *"The meeting was more intimate and allowed us to have more direct interaction*." Finally, some teams seemed to appreciate the ownership that they were given through participation opportunities. According to one team member, "*The Learning Clusters involved us more – when you are able to get involved, it's more yours. For example, they asked me to speak at the Church Learning Cluster, and it made me more interested in the whole thing, I got more out of it."*

Coaching

The consensus among TDE, MDC and site respondents is that coaching is the most important support offered in PRC. PRC's complexity called for multifaceted coaching, which included organizational development, team building, and programmatic assistance for teams (see Exhibit for the PRC Coach Job Description). These roles were applied variably across sites and were influenced by multiple factors, including the coach's experience level, familiarity with MDC coaching methods, match between coach and sites, the relationship with sites as perceived by the various players, and program design. Despite this variability, of the 20 sites, 17 (85%) found coaching "useful" or "very useful," and no sites rated coaching "not useful."

Coaching
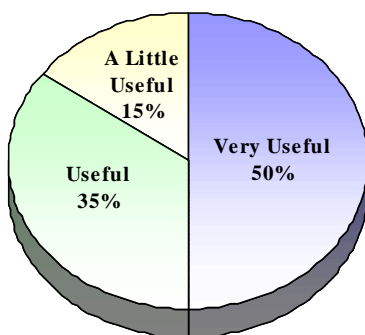
Early on, teams mainly valued the role coaches played in facilitating organizational development processes, such as strategic planning, governance, and fundraising to get team infrastructures established and programs underway. In particular, because the language of economic development was unknown to some prior to PRC, a number of sites valued the assistance coaches provided in helping translate program ideas into "MDC/TDE-language" during the initial planning and subsequent proposal renewal periods. This bridging role played by coaches between sites, MDC, and TDE was cited as critical, particularly for Option 2's, even outside of the planning and proposal processes.

Perhaps even more than support with organizational development and language, Option 1 teams emphasized the importance of focused coaching on internal process and dynamics to help teams work together effectively and stay focused on their goals. Coaches were able to see different perspectives and act as brokers among team members – they could bring issues to the surface, offer suggestions for addressing them, and make sure voices were heard. According to one coach, *"I'm an early warning system about what's going well and not well."* In the words of another, *"I am the objective eyes and ears, a sounding board, and a problem solving partner – I'm a connected but detached third party."*

Finally, given PRC's focus on doing new work differently, coaches offered important stability and reassurance to teams trying new approaches and working together in new ways. *"Sometimes it's just being present – like when someone has died, you're just there to reassure."* Coaches also helped teams develop alternative analyses of their communities, strategize different options, and (sometimes drawing on the Technical Assistance Pool) connect to financial, human, and information resources to implement the options. Finally, the coaches played a critical, albeit less tangible, role of keeping the fire of hope burning for the team, *"MDC sometimes had confidence when the sites themselves didn't have it."*

Although a higher percentage of Option 2's than Option 1's found coaching "very useful" (8 out of 13, or 62%, of Option 2's as compared to 2 out of 7, or 29%, of Option 1's), a significant challenge for Option 2 sites with respect to coaching was having it introduced in year two rather than at the beginning of the program. While most Option 2's were relieved to receive the assistance, for some it took a concerted effort to do the relationship building work retroactively, *"So when the coach came in, we were a little hesitant because we thought that he was there to tell us what to do. It took us a minute to understand his role and connect to him."* Because of the reliance on coaches during the planning and proposal process, as well as for bridging communication with MDC and TDE, some Option 2's felt that getting a coach in the second year of the program may have defeated the purpose: *"I think that there was more 'hands-on' midterm than in the beginning. It should've been the other way around. We ran over here, during that first six-months… we were wide open. MDC was nowhere in the loop… we were just running."* The late entry also put the coach at a disadvantage, *"When he came around, we'd already embarked on this course. He had to play some serious catch up."*

Another limitation on coaching was some lack of clarity about how much local initiative should drive the process. Some sites felt that the coach did not push enough on one of PRC's main goals, engaging people left behind by the economy: *"I think that the coach should be more assertive and take more of a role in 'nudging' us back in that direction so that we won't lose sight of the work. It's important… and it's why many of us got involved."* Because there was no clearly articulated orientation concerning how responsive to and supportive of site aspirations coaches should be versus how much they should ensure that sites were working within the program model, some sites expressed the sentiment that coaches pushed on the program model at the expense of the sites' interests and desires, *"I understand this project as being about local communities coming together to solve their problems. That's not really what's happened. I feel more like MDC has come in and told us what to do."*

These different perspectives reflect the inherent tensions in a multi-site initiative community-based initiative in which coaches aim to mobilize local energy and initiative but channel it within the initiative's broad framework and goals. Greater clarity and consistency about how to balance these tensions might have provided coaches with a stronger foundation for their work.

Finally, coaching 23 sites requires a significant commitment of time. Both MDC and TDE suggested that in the best of all possible worlds, coaches should be MDC staff who have deep experience working with community groups in the "MDC way." Having a few dedicated coaches on staff is clearly a lot easier to manage than hiring multiple consultants and is likely to result in less variation in philosophy and approach across sites.

Part 3: The Management and Support Implications of Some Key Features of PRC's Design

Several key features of PRC's design both shaped and challenged MDC's strategy to manage and support the initiative:

Churches and hospitals as local conveners. PRC was not anchored by institutions that had significant economic development experience. Although churches and hospitals did bring many other assets to the table, it was critical that MDC devote significant time and effort to helping teams add members who had such experience and to exposing teams to state of the art thinking in this area. PRC's experience to date suggests that while churches and hospitals cannot do this work alone, they have for the most part been effective conveners for a broader collaborative effort focusing on economic development. [1]

Scope: Starting with 23 sites in two states. Starting an initiative with such a large number of sites, many at great distance from each other, created logistical challenges for MDC's cross-site convening and site visiting agenda. The diversity among sites in experience, history, racial/ethnic dynamics, economic opportunity, leadership, and politics meant that MDC had to shape its support strategy to be highly responsive to local context, a huge task in so many sites at one time. Further, working in two different states with different policy environments and opportunities made it difficult for MDC to both ensure that information and resources were relevant for sites in each state and to aggregate the sties' experiences to effect policy change.

Timetable: 6 month planning period and 3 years of implementation. PRC's relatively short timetable conditioned the impact of MDC's support strategy. Although the coaches report that sometimes the sense of urgency helped focus their work with the teams, they more frequently underscore the negative effects of PRC's timetable on their own effectiveness. Two specific examples were most frequently cited.

First, although the planning period was officially six months long, site proposals were due a little more than half-way through that period. This meant that the teams were so focused on getting their initial proposal done that the coaches felt in many cases unable to focus sufficiently on team and relationship building. As a result, the truncated Vision to Action planning process

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[1] See previous Chapin Hall Working Memoranda on the role of TDE-eligible churches and hospitals in PRC.

failed to lay the groundwork for effective implementation in some sites. Said one coach, *"... the issues in these communities are too deeply rooted to deal with in such a short period of time. I have to convince people that they can do things when the goals are impossible."*

Second, the perceived pressure to produce quantifiable results that could be sustained after the end of TDE support led coaches in some sites to short-circuit the process and value short-term gains over longer-term ambitions or to overvalue Goal #1's more easily quantifiable outcomes over Goal #2's leadership development and other more qualitative outcomes.

Two-tiered program structure (Option 1 and Option 2 sites). MDC proposed to TDE that PRC's design include a two-tiered program structure. The notion was that, based on site history and current readiness, Option 1 groups would be more ready to take on a more complex and ambitious set of issues involving the broader community, whereas Option 2 sites would focus on a particular project. MDC would provide a different package of support—in particular coaching—to Option 1 sites to help them navigate through the complicated challenges they would face. TDE accepted MDC's recommendation and funded 7 Option 1 sites and 16 Option 2 sites. As the work developed on the ground, however, the distinction between some Option 1 and 2 sites became less clear, and Option 2's needs for coaching more apparent. Sites had different capacities but they were not entirely commensurate with their placement into Option 1 or 2 status. MDC then reconfigured its existing resources to provide coaching to Option 2 teams, though at a somewhat lower intensity than for Option 1s. Option 2 teams, as well as MDC and TDE staff, report positive outcomes directly linked to the addition of ongoing coaching to their sites. Both MDC and TDE staff now agree that locking sites into rigid categories at the outset was not a good design strategy.

Part 4: Lessons for Future Initiatives

On the basis of PRC's experience to date, three categories of broad lessons about management and support may be useful for other foundations and intermediaries considering similar initiatives.

Lessons regarding the foundation-intermediary relationship

Effective foundation-intermediary relationships incorporate the unique characteristics and capacities of each partner, as well as the goals of the initiative. TDE chose MDC as PRC's intermediary and, in fact, might not have engaged in the initiative if there had not been a qualified and experienced organization like MDC with which to partner: *"I do not think we would have ventured into the area of economic development if we did not have a partner that was well versed in the area . . . deep expertise that complements the foundation's strength would be the number one thing I would recommend for a good partnership."* An intermediary with complementary skills also ends up helping to build the foundation's knowledge base and capacity.

When two organizations work so closely together to accomplish shared goals, a key ingredient to success includes clarity regarding expectations and rules of engagement. Addressing the

following kinds of questions at the outset of an initiative is likely to help both the foundation and the intermediary carry out its tasks effectively:[2]

◆ Do the foundation and the intermediary share the same vision and goals for the initiative?
◆ How will they divide up the tasks—who does what, who is accountable to whom for what? How will authority and responsibility be allocated?
◆ How will they communicate—how frequently, in what ways, about what?
◆ What are the foundation's sensitivities and risk tolerance?
◆ Who has responsibility for/control over which kinds of funds?
◆ How will differences be resolved?
◆ What importance does the foundation attribute to candid reports on problems and progress, and what are the likely consequences of hearing various forms of "bad news"?
◆ What kinds of grantee problems need not be disclosed to the foundation?
◆ What degree of contact does the foundation expect to maintain with grantees?
◆ How can the foundation and the intermediary be learning partners? How will institutional learning take place?
◆ What degree of oversight should the intermediary expect from foundation staff?
◆ By whom and against what standards will the intermediary's work be evaluated?
◆ What degree of contact should the intermediary expect to have with the foundation's board?
◆ How can the understanding and commitments established at the outset persist over the life of the initiative while being reviewed on a periodic basis and modified as necessary?

TDE and MDC addressed many of these questions early on, and each offered its distinct knowledge and resources to teams without confusion about the different roles each organization played in PRC. That said, respondents from both organizations report that if they were to do it again, additional conversations upfront would have been useful. These conversations could have addressed some of the issues described earlier, such as coming to a mutual understanding of how success in PRC was to be defined, measured and reported. Also critical is figuring out how to structure a learning partnership between the foundation and the intermediary so that the initiative benefits as fully as possible from the active engagement and knowledge of both key players. Even at this point in the initiative, scheduling a series of learning exchanges between TDE and MDC for the remainder of the program would allow each organization to share its observations about the program and its effectiveness. Deep institutional learning from a major initiative like PRC calls for an investment by both the foundation and the intermediary in mutual reflection and ongoing dialogue about how the initiative is faring and why.

Lessons about PRC's supports
Starting from the premise that individuals learn in different ways, MDC developed a rich array of supports and delivery systems to match the diverse set of PRC sites and players with everything from hands-on technical assistance and coaching to workshops and training to discussion groups and conference calls to newsletters and email updates. The result was that most staff and team members, regardless of prior experience in community economic development, were able to find

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[2] Some of these questions are included in or adapted from the Funder's Checklist in P.L.Szanton, "Toward More Effective Use of Intermediaries," in Practice Matters: The Improving Philanthropy Project, September 2003 (www.fdncenter.org/for_grantmakers), p. 43. See also P. Brown, "The Experience of an Intermediary in a Complex Initiative: The Urban Health Initiative's National Program Office," March 2005 (www.urbanhealth.org).

and benefit from a method that was effective for them: *"The learning clusters are good for those folks that haven't really done a lot of this work… but it's the written materials that they send and the coach that have been the best resources that we've received."* Learning reached across PRC's multiple constituencies: *"I'm 58 and have been doing this work virtually all of my life … there is no assumption that everyone is at one level."* Through these diverse supports, MDC provided team members with concrete information and tools as well as with a less tangible (but very important) sense of hope and motivation, *"the different memos and ideas about economic development are motivational and inspiring. I often quote from them to motivate the board."*

While almost all of the sites recognized the tremendous opportunities for learning in PRC, they also recognized the importance of remaining clear on their own goals and of situating PRC learning opportunities in this context. *"Really use the intermediary's expertise and guidance but always put it in the context of what your team's goals are and what is best for your team."* MDC has played the dual role of pushing teams to value local wisdom while also being open to new ideas and trying new approaches. Teams must then determine for themselves the balance of drawing on the intermediary for direction and letting direction emerge from within the team and the community.

Clarity and consistency in communication from MDC to sites with respect to everything from understanding the overall program model to how the TA Pool operated was critical. A number of interviewees said that at times, particularly in the beginning, they found things hard to pin down – that the project started out open ended and then narrowed as it went on. Rather than stating a preference on the continuum from strict adherence to a program model to unlimited flexibility, however, sites emphasized that consistent and clear communication as things evolved was most important. *"If you're going to run it loose, fine, but don't try to tighten it up midway through without regrouping us to tell us that's the plan."*

Lessons about the management and support implications of PRC's design

PRC's experience suggests broad lessons for other initiatives in at least two areas: 1) launching and "pacing" sites in a multi-site initiative and 2) the timetable for community change.

Starting an ambitious initiative that requires the funder, the intermediary and the sites to do business in new ways is challenging with a small number of sites. Doing so with 23 sites in two states is geometrically more difficult. Despite a thoughtful selection process, it was impossible for TDE and MDC to learn enough about local capacities and dynamics to sort them in a sufficiently reliable way into Option 1 and 2 sites with different but appropriate support strategies. As several interviewees suggested, a better strategy might have been to start smaller, coach all sites through the planning period and then develop appropriate support strategies. These strategies could then be informed by the results of the planning process, the coach's relationship with the team and the greater understanding of the opportunities, barriers, and levers for change within the community. Further, if the funders and intermediary believe that it is important to include a large number of sites in the initiative, the sites could be phased in two or three cohorts so that all parties have the opportunity to learn from experience and modify the support strategy as necessary.

The second broad lesson, which is consistent with the experience in other multi-site initiatives, relates to the intermediary's role in keeping the vision of the initiative front and center in everyone's mind in spite of mission drift or inevitable pressures for sites and for foundations to reframe the initiative's goals in the face of adversity. PRC was launched with some key ideas and values: the primary role of diverse teams in driving local development; the importance of innovation and of doing rural economic development differently; the need to engage people left behind by the economy as development partners as well as clients; the value of teams serving a catalytic role in their communities rather than focusing primarily on operating programs themselves. Experience has demonstrated that the perceived pressure to produce tangible outcomes and develop strategies to sustain them within a three-year time frame tended to overshadow some of these ideas. For example, how to engage people left behind by the economy was a major focus of a Learning Cluster and other support activities early on in PRC. While MDC and TDE recognized midway through the initiative that involving people left behind on the teams within a three-year timeframe was for the most part unrealistic, this realization was not surfaced for critical discussion among PRC's participants.

In adapting PRC's ideas to the reality of the timeframe, it might have been useful for MDC, TDE and the sites to engage in an ongoing dialogue about the potential tradeoffs that such a timeframe presents. What was realistic to accomplish in three years and what seemed to be overreaching? How could all the parties protect the initiative from overvaluing Goal #1 at the expense of Goal #2? How could the initiative accommodate to the challenges sites faced on the ground without sacrificing some of its key ideas? Or were there aspects of PRC's conceptual framework that needed to be revised based on experience? Open and ongoing dialogue about these issues among all the parties might have been helpful to developing a more powerful shared understanding of PRC's short and long-term goals. Another benefit might have been support for institutional learning within the intermediary and the foundation, as well as within the teams.

The intermediary role in any multi-site community change initiative is complicated, and the design elements particular to PRC (working through teams in twenty-three sites with lead organizations new to the field within a three-year implementation period) only made it more so. Even in the context of these challenges, however, MDC was able to provide an enormous array of supports, bridge gaps, provide cutting edge information and training, and share its expertise with the donor, as well as with the sites. As important, PRC had an intermediary that could keep hope alive and in perspective for the teams doing the work. As one team member commented, *"At this level, you can get so involved in the day-to-day work… that you often forget to look back to see how far you've come and where you're going."* He went on to say that MDC had helped the team stay focused on the big picture and support the momentum of the work despite challenges. Helping sites keep their eyes on the prize is a critical role for any intermediary.

EXHIBIT

Program for the Rural Carolinas
Coach Job Description

I. **Establish clear but flexible roles and responsibilities for coach and team**
- Establish trust and confidence among team members and in the community
- Discuss with teams what roles and responsibilities of a coach are and are not
- Establish visitation and communication schedule and process, while building in flexibility for emergencies
- Be willing to adapt coaching style as needed to ensure success of team

II. *Help local team with program*
- Review work plans with team to understand logic of team programmatic activities
- Compare teams goals to desired goals and outcomes for Program and "permissible uses of funds" letter
- Be an informed listener -- ask questions about program activities that seem hard to understand or poorly thought out
- Help team locate specialized resources in areas where you are not an expert to help them in designing and carrying out program activities
- Encourage team to "begin with the end in mind," considering sustainability as it undertakes any new activity
- Be in regular touch with senior MDC staff about mix of development goals and thoughtfulness of proposed plans.

III. *Help local team with process*
- Help team recognize unaddressed issues or arguments and develop plans to work around those issues
- Assist team in carrying out programmatic activities *in such a way* as to encourage formation of a "continuing partnership" which lasts beyond the life of the Program, with new levels of trust, shared power and civic engagement.
- Help the team engage the "people left behind" in their local efforts. Draw on the best thinking in helping the team tackle this tough work.
- Be a cheerleader when the team does good work; a conscience when team is doing incomplete work
- Find ways to encourage team members to become open-minded, optimistic, enthusiastic learners
- Assist team by reviewing renewal proposals in advance of submission. Depending on the team, this might involve a great deal of work in the month before submission.

IV. *Help MDC/TDE learn and improve the program*
- Communicate MDC/TDE program policy to team
- Submit monthly reports to MDC on team progress, red flag issues, areas where you need help, etc.
- Draw on resource materials developed by Chapin Hall, as they help lift up learnings for all program staff.

- Attend regular MDC Program for the Rural Carolinas coaching meetings and lift up issues that matter to the ultimate success of the program.
- Make recommendations for improvements to program design and policies
- Be available to respond on an ad hoc basis to review memos, ideas, etc. from project manager.

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	Beaufort County Program for the Rural Carolinas Beaufort County, NC Affordable housing. IDAs[1] and an EITC[2] programs; small business development; and raising income levels through education and training.	2002-2006
Hinton Rural Life Center	Far West Mountain Economic Partners Cherokee, Clay, Graham & Swain Counties, NC Heritage tourism, small-scale agriculture, and affordable housing.	2002-2006
Maria Parham Hospital	TEAM VANCE Vance County, NC 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.	2002-2006
Marion County Medical Center	Marion County Collaborative Action Network Marion County, SC 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.	2002-2005
North Wilkesboro District United Methodist Church	Northwest Alliance Program for the Rural Carolinas Alleghany, Ashe & Wilkes Counties, NC Leadership, marketing, program development, and entrepreneurial development.	2002-2006
Randolph Hospital	Randolph Program for the Rural Carolinas Randolph County, NC Goals are directed at increasing employment and wealth.	2002-2006

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[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

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[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	CAN Program/The Collaborative Colleton County, SC Increasing employment and wealth through IDA program.	2002-2006
Onslow Memorial Hospital	Onslow PRC Onslow County, NC Assessing the needs of the left-behind, improving their financial literacy, and building their wealth through the establishment of EITC and IDA programs.	2002-2006
Pender Memorial Hospital	Pender Rural Economic Development Task Pender County, NC 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.	2002-2006
Pilmoor United Methodist Church	Steps-to-Success Camden & Currituck Counties, NC Develop jobs, provide life skills training and mentor the left-behind. Create sustainable non-seasonal employment opportunities for coastal area citizens.	2002-2005
Pinetop United Methodist Church	Pinetops PRC Edgecombe County, NC Creating a new economic environment that provides new opportunities for employment and asset building through business development and growth.	2002-2004
Roanoke Chowan Hospital	Roanoke-Chowan PRC Bertie, Gates, Hertford & Northampton Counties, NC Workforce development and increasing employment.	2003-2005
Snow Hill United Methodist Church	Stokes PRC Stokes County, NC Support local farmers and foster workforce development.	2002-2006
The Rockingham District United Methodist Church	The Robeson County Program for the Rural Carolinas Robeson County, NC 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.	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.