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MID-YEAR IMPACT REPORT 2021





Greeting friends and neighbors in Western North Carolina.

In December 2020, Dogwood Health Trust issued our first-ever Annual Report. That document shared our 2019 financial statements and gave an overview of our estimated grantmaking for the year 2020. While we'll share another annual report at the end of this year, we also want to provide a brief, mid-year update of our 2021 activities in this year of recovery.

Our focus is squarely on Dogwood's purpose: dramatically improving the health and well-being of all people and communities in Western North Carolina. We are a resilient region, and although 2020 was a year of unprecedented hardship, it also forced us all to pause our normal courses of operations and reconsider what truly matters in our work: relationships, equity, caring, compassion, empathy, creativity, innovation and working closely together for the benefit of all.

As we move through 2021, we are guided by this knowledge. There are many factors that lead to a fulfilling

life for the people of our region. As you will read on these pages, our teams of board. staff and community are working together to tackle thorny issues and identify the places where Dogwood can have a generational impact in each of our Strategic Priority areas. Our challenge is to define the specific courses that we believe will lead to true and lasting improvements in the health and well-being of all people.

We envision a Western North Carolina where every generation can live, learn, earn and thrive (no exceptions), and we will work tirelessly with our community to achieve that vision.

Wishing you health and wellness,

Janice Brumit

Chair, Dogwood Health Trust Board of Directors



Program-Related Expenses \$1.54M*-

Leverage Fund \$0.6M

application support, etc.





During 2020, Dogwood Health Trust invested just over **\$48 million** in the region.



*Includes advertising for COVID-19-safe behaviors and Census participation, Independent Monitor fees, Legacy Foundation support. Healthy Opportunities Pilot

Recent Highlights

2021 is a year for learning from adversity and drawing on our collective regional creativity to move forward better and stronger than before. For Dogwood, that means looking within as well as working with our partners.

As of July 31, Dogwood had approved more than \$36 million in grants to 108 organizations.

In the first seven months of 2021, we also have:

- Launched a new online grant portal where more than 200 organizations entered the grant application process.
- Created and supported the WNC Vaccine Acceleration Consortium to increase the uptake of COVID-19 vaccines to speed our region toward safe reopening.
- Met with community partners from across the region.
- Onboarded our Interim CEO, Dr. Susan Mims, and our Senior Vice President of Impact, William Buster, who lead our strategy development work.
- Solidified our internal operations, addressing many start-up tasks postponed during our work to help address COVID-19.
- Engaged highly-respected consultants to take a deeper look at our internal diversity, equity and inclusion practices and inform our strategic planning.
- Begun to grow our team so that we can enhance our community engagement and develop more and deeper relationships throughout the region.

Although we've not paused our grantmaking, we have been focusing on developing longer-term goals and metrics in each of our four Strategic Priority areas (Housing, Education, Economic Opportunity, Health & Wellness), and we aim to share these goals and metrics before the end of 2021.



HOW WE ARE Shaping Our Work

The Strategic Priorities our board adopted in 2020 are complex and interwoven and will require multi-faceted approaches. Our current work focuses on finding the places within these complex tapestries where Dogwood Health Trust can provide support in ways that will deliver lasting, generational change. These are not goals we can set in a vacuum, so we have developed a process that draws from a wealth of knowledge, lived experiences and creative innovation.

First, we continually inform our work by **listening** to our communities, **learning** from our grantee partners and using the resources of national and regional data sources, subject matter experts and proven practices here and elsewhere.

Second, we explore our collective learning, knowledge and lived experiences through Impact Strategy Teams. These teams consist of our board and staff team members, as well as community advisors. Together, we are engaging in objective learning, diving into strategic discussions and tackling hard guestions to determine the most effective ways for Dogwood to engage in each Strategic Priority area.

Based on the work described above, we will begin to define strategies to pursue the equitable outcomes we seek and the systems change we hope to achieve. In doing so, we also will define how we will hold ourselves and our partners accountable. We will continue to learn from others who can inform our path forward and always remain flexible to best adapt to changes in the environment around us and the new challenges and opportunities that will doubtless develop.

Housing | Education | Economic Opportunity | Health & Wellness



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Supportive Housing: Homeward Bound Home is Key Initiative - \$2 million

Homeward Bound's Home Is Key Initiative will establish 85 units of permanent supportive housing to serve chronically homeless individuals at a former Days Inn motel on Tunnel Road in Asheville. This initiative is based on the best practice "Housing First" model and will provide permanent housing, supportive medical and social services and immediate necessities for individuals

experiencing homelessness. Dogwood's funding will help Homeward Bound secure the purchase of the motel property.





Homeownership: Habitat for Humanity - \$1.7 million

Homeownership is key to building wealth for most people. Habitat for Humanity has an international reputation for helping first-time homebuyers afford

homeownership. By providing "sweat equity" along with scores of volunteers, Habitat for Humanity helps residents who might otherwise have no way of purchasing a home take possession of their very own house and do so knowing they have the skills to maintain and budget for its ongoing upkeep. Dogwood's investment will help 10 area Habitat for Humanity organizations build one new home each for first-time homeowners across the region.

Valdese Weavers Mill - \$2 million

This historic property in Burke County will become 60 apartments that will provide rental homes to area residents who make 60% or less of the average median income. Turning the former mill into housing not only provides places to live. but also serves as an anchor for the community to grow and thrive. Dogwood's grant provided the missing link that allowed Northwestern Housing Enterprises to leverage other funding in the form of tax credits. loans and deferred developer fees.

GRANTEE HIGHLIGHTS



Our region is not new to educational disparities when it comes to key indicators like reading proficiency, discipline rates or post-secondary degree achievement. The racial disparities that pervade our school systems are well known, and COVID-19 shed a brighter light on even more challenges to educational equity, such as the shortage of high-quality early education options for a solid start in learning and the importance of broadband connectivity to complete studies and assignments outside of the classroom. Dogwood considers the full spectrum – from birth through college and career success – in its education investments, with a particular eye toward addressing disparities in opportunity and outcomes.

Dogwood will grant roughly \$9 million to education by the end of 2021.









WNC Region Education Service Alliance (WRESA) - \$290,700

Even before the pandemic, school systems were seeing a drastic need for additional mental health support. A year of online learning or hybrid learning only added to that need. With this grant from Dogwood, WRESA will work with all school districts in WNC to deliver a Multi-Tiered System of Support (MTSS) to help schools identify struggling students in grades K-12 and address their individual needs early and quickly. Interventions include both academic and behavioral supports that are deeply rooted in social/ emotional learning (SEL) – an area listed by schools throughout the region as a top priority for healthy development. With this funding WRESA is providing a regional SEL coordinator for the western region as well as numerous SEL professional development courses.

Verner Center for Early Learning- \$200,000

The need for quality childcare in our region far outstrips the number of spaces available. Verner is helping to meet this need by constructing a new childcare center on the campus of Emma Elementary School. The new center will greatly expand access to high-quality and inclusive early care and education (ECE) for approximately 100 children ages six weeks to five years old, including 32 Early Head Start children who Verner currently serves at Pisgah View Head Start. The new center's durable modular design will shorten the timeframe for construction, with a goal of opening no later than June 2022.



GRANTEE HIGHLIGHTS



Building our region's economy means creating sustainable, meaningful jobs for our residents. Our work to create economic opportunity includes growing local businesses as well as attracting investments from companies outside our region to create jobs that support families across WNC. The majority of positions will be homegrown, offered by entrepreneurs who reside in the region. Our grants may also be supplemented by impact investments that support job creation. (See page 15.)

> Dogwood anticipates \$10 million in grants for Economic Opportunity by the end of 2021.











Grantee Spotlight: The Industrial Commons - \$500,000

Over the past centuries, economic practices of extraction and exclusion have left some communities in deep generational poverty and on the margins, out of the decision-making process. Changing this dynamic requires a multi-pronged approach, which is a hallmark of The Industrial Commons (TIC) in Burke County. TIC works to recreate just local economies based on locally rooted wealth, building new systems for housing, lending and business resources with equity as their central tenant. Dogwood's investment supports TIC's work to both support local entrepreneurs and move new and existing businesses into employee ownership - thereby creating new sources of generational wealth.

Weaving Strategic Priorities Together - \$795,000

Regional opportunities often weave multiple Dogwood Strategic Priority areas together. For example, consider the very close relationships between education and economic opportunity. Employers need to hire individuals who have earned the credentials required to perform on the job, yet fewer than half of North Carolinians have the education levels needed to fill open positions. For historically underserved or underrepresented populations, the impact is even stronger. On the other hand, students need to know that a sustainable job awaits them upon graduation and see the benefit of pursuing the necessary education to secure that employment. WNC's community colleges are the places where the dreams of students can directly connect with the vision of employers, thereby weaving education and economic opportunity seamlessly together.

To help increase opportunities for both students and businesses in WNC, Dogwood is partnering with myFutureNC and the ncIMPACT Initiative from the University of North Carolina at Chapel Hill, to serve every

county in our region. Place-based, cross-sector educational collaboratives will significantly increase the number of residents successfully completing post-secondary credentials and securing living-wage employment, by providing a clear pathway from school to work, supported by a full range of community organizations. Regional managers will help each collaborative develop tailored plans that will work for their specific communities.

Dogwood's funding helps expand the reach of this program to every student across the region by adding four additional collaboratives in WNC, representing a total of 13 counties and providing direct support for work in five other counties that are not part of an official collaborative. Ultimately every WNC county will be part of a formal collaborative.

GRANTEE HIGHLIGHTS



In addition to building on our work from 2020 to increase COVID-19 testing resources, our 2021 health and wellness work expanded to include broader dissemination of accurate information through regional messaging campaigns, support for Community Health Workers to conduct targeted outreach to meet people where they are and connect them to vital resources, coordination of vaccine distribution and support for an innovative program to monitor community spread through wastewater analysis. We also made investments to help WNC residents increase access to healthcare and human services that will extend well beyond the pandemic, including being named the lead entity in one of three regions in the state to launch a new Medicaid pilot program.



IEALTH TRUS

Pisgah Legal Services -\$8,347,170 (over three years)

Poverty and low income are significant barriers to helping individuals and families gain access to quality healthcare - as well as helping them secure housing, education and gainful employment. Pisgah Legal Services recognized that WNC residents have a key opportunity right now to help address poverty and gain

access to affordable care by claiming pandemic recovery child tax credits and enrolling in healthcare through the Affordable Care Act. For the next three years, Pisgah Legal Services will work with many other partners to provide outreach into every county in the region to help eligible residents increase their financial security and achieve access to health care.

In May 2021, the North Carolina Department of Health and Human Services (DHHS) selected Western North Carolina as a site for a bold new plan for Medicaid services. The new program, called the Healthy Opportunities Pilot (HOP), will make it possible for organizations that provide services related to nutrition and food assistance, transportation, housing and interpersonal safety to receive payments for services they provide to eligible Medicaid patients. The goal is to learn whether we can improve health and save millions on treatment of clinical illnesses or conditions by investing in evidence-based interventions before health becomes a problem. Dogwood Health Trust is serving as the HOP Network Lead for the 18 counties in Western

North Carolina. To manage this work, we launched a new, community led entity called Impact Health. Learn more about this work at www.impacthealth.org.



Grantee Spotlight: WNC Health Network - \$582,465

People are most likely to get a COVID-19 vaccine when they receive supportive messages from trusted medical professionals and others in their communities. Knowing this, the WNC Health Network adapted the state of North Carolina's "My Reason NC" messaging campaign into a customized "My Reason WNC" campaign that allowed every county and partner in the region to insert their own images into free templates to produce social media messages and print materials. WNC Health Network started their work in 2020 with messages about COVID-safe behaviors (Wear. Wait. Wash.) and then quickly added vaccine messaging once the vaccines became available. Messaging is also customized for historically marginalized communities to build trust and encourage vaccinations.



Grantee Spotlight: Highlands Cashiers Health Foundation and Blue Ridge Health - \$300,000

Over the last 10 years, residents on the Highlands Cashiers plateau have seen the number of local physicians dwindle from 10 to two, even though access to affordable healthcare was identified by local leaders as one of the root causes of systemic problems in their community. In response, the Highlands Cashiers Health Foundation launched its "Expanding Rural Healthcare Access" project, which aims to grow the number of providers serving the rural plateau area. Dogwood provided partial funding support for the first-year

start-up costs for a new comprehensive family medicine center operated by Blue Ridge Health in collaboration with Mountain Area Health Education Center (MAHEC).



Grantee Spotlight: WCMSF Mobile Vaccine Clinics - \$80,000

COVID-19 hit the Hispanic and Latino communities of WNC particularly hard. While this group makes up 7% of the population statewide, their rates of infection were 20%. Vaccines can play a critical role in limiting infection, but only if individuals feel that the vaccine – and those administering it – are trustworthy. That means providing clear, straightforward information in the appropriate language and working with trusted local organizations to provide easy access to vaccines. The Western Carolina Medical Society helps increase access and uptake for COVID-19

vaccinations in Latino/Hispanic and Black communities in Buncombe, Henderson and McDowell Counties. Volunteer medical professionals provide vaccination services at organizations and churches located in Hispanic/Latino communities, bilingual outreach and translation services at vaccine clinic events, outreach and education within the communities about the vaccine and promotion of the events. WCMS partners with community-based organizations serving Hispanic/Latino and Black communities as well as with healthcare providers to administer vaccines at mobile clinic events.





Substance Use Disorder

Dogwood Health Trust has committed \$5 million per year for five years to address the critical issue of substance use disorder in Western North Carolina. Our strategies include support for life-saving Naloxone distribution, syringe exchanges, medication-assisted treatment and supportive prevention programs for adults and youth.



Grantee Spotlight: Eleanor Health Foundation – \$205,000

Eleanor Health Foundation's vision is "equitable access to addiction recovery." This includes access to the full spectrum of services: treatment, recovery, prevention and harm reduction. Dogwood funding supports the organization's Mental Health Medical Home program, which provides scholarships for those without insurance who are experiencing substance use disorder (SUD) issues. There are many challenges to accessing comprehensive coverage to support SUD treatment, and this program pays for the full array of services including medication-assisted treatment, recovery coaching, therapy and psychiatric evaluation. In addition, Eleanor Health Foundation provides dedicated Social Determinants of Health Scholarships to roughly 100 clients annually who are among the most vulnerable; this includes those who have experienced recent overdoses or SUD-related in-patient or ER visits. The fund can help pay for services that are a part of "recovery capital" or those supports that increase the prospect of recovery, including housing, transportation, medication and resources towards employment.

At its inception, Dogwood Health Trust made a deep and public commitment to diversity, equity and inclusion as a cornerstone of all aspects of our work. In the summer of 2020, as the nation and our region reacted to the violence against Black Americans, our board and staff redoubled this commitment, allocating \$5.5 million in funds specifically for the support of racial equity work. Since then, through July 2021, we have funded \$4.46 million in support of organizations led by and primarily serving people of color to address inequities and promote healing.



Grantee Spotlight: Hands On! Children's Museum, **BIPOC People's Museum & Walk of Fame Project -**\$80,500

In 2020, in response to the death of George Floyd, many people within the Hendersonville Community took to the streets to peacefully voice their pain, frustration and thirst for a more peaceful world that is free of racism and discrimination. Those peaceful demonstrations sparked a conversation about finding a lasting way to honor Black, Indigenous and People of Color (BIPOC). Multiple community members suggested a museum to honor BIPOC. As an established cultural arts organization and major educational destination for children and families,

Hands On! became the natural home for this cultural resource. The People's Museum and Walk of Fame exhibits will be located within the museum's West Wing, will be free to the public and will feature exhibits showcasing BIPOC history and contributions to Henderson County and WNC.



Racial

Equity

Grantee Spotlight: PEAK Academy -\$614,726

A public charter school focused on providing a culturally relevant curriculum and high expectations for young learners regardless of race or socioeconomic class, PEAK Academy will open its doors in West Asheville in the Fall of

2021. Dogwood provided start-up funds to help prepare the school for its first classes of kindergarten, first and second graders, intending to add new grades each year through grade eight.





Leverage Fund

Although Dogwood's grantmaking capacity is considerable, the needs and opportunities of the region will always far surpass the abilities of a single foundation. There are billions of dollars available from state and federal sources that we can help bring into Western North Carolina to amplify the work of myriad partners. To do this, our Leverage Fund pairs local organizations with professional grantwriters who have proven track records for securing funds from the sources that the local organizations identify. Dogwood underwrites the cost of the grantwriting services and will sometimes provide matching funds to fulfill grant requirements.



Grantee Spotlight: West Marion Community Forum

In April of 2021, The West Marion Community Forum, Inc. was awarded a \$300,000 grant from the Robert Wood Johnson Foundation's Community Solutions for Health Equity Program. The grant was secured with support from the Dogwood Health Trust's Leverage Fund. The purpose of this grant is to partner with historically

excluded communities and local healthcare system leaders to reduce racial disparities that exist in the quality of care received by communities of color and develop inclusive care delivery models that advance health equity for all.

"By listening to the lived experiences of Black and Brown communities, we can better understand how these inequities show up in our healthcare system. Next, we can work intentionally to co-create solutions between patients and healthcare system leaders to address these challenges in real and lasting ways," said Paula Swepson, Executive Director of the West Marion Community Forum, Inc.

"This grant provides us with a unique opportunity to lean into hard discussions, acknowledge the disproportionate harm caused by institutional racism towards communities of color, re-build trust with our healthcare system and co-create more equitable healthcare policies and systems," said Mary Snow, Consultant to the West Marion Community Forum and Principal Consultant at Equitable Community Strategies.

By improving the cultural competency of healthcare providers and the equity of systems serving Black and Brown patients, West Marion Community Forum will improve access to quality essential health and mental health services and, subsequently, strengthen health outcomes while reducing racial disparities across McDowell County.



Impact Investments

As a private foundation, Dogwood can supplement its grantmaking with other forms of investment, such as providing loans or loan guarantees, offering startup capital or becoming an equity partner in an investment. We can also dedicate a portion of our invested assets to vehicles that help promote businesses and job creation in the region.

Recent Highlights:

- Housing is a prime area for impact investing. In Rutherford County, Dogwood has joined Housing Assistance Corporation to build a new 60 unit multi-family housing development at John Smith Road. In conjunction with the multi-family units, Dogwood also provided funding to Gateway Health Foundation to create single-family homes on the property, manufactured by Kituwah Builders, which is owned by the Eastern Band of Cherokee Indians.
- In 2020, we provided loan guarantees that allowed Sanesco Health (operating as CommunityLab WNC) to expand its business to include dedicated COVID-19 testing in Western North Carolina. CommunityLab WNC has since been approved to offer Yale University's Saliva Direct test, a saliva-based PCR test that also allows people to collect their own samples and overnight them from the privacy of their homes.
- In addition to using our grant funds to help improve lives in the region, we have also invested \$25 million of our endowment assets in a new venture capital fund, Pisgah Fund, dedicated to seeking out and supporting new and growing companies in Western North Carolina that will both provide jobs and help address issues related to health and well-being.

How to Work With Us

Ne know that there are countless opportunities to partner across the region with organizations that share a commitment to our Strategic Priority areas. Sometimes those partnerships start with a grant application, but more often they begin with a glimmer of an idea and an informal conversation.

No matter the stage of your work, we'd like to hear from you. Please visit the Apply for Funding page on our website to start the conversation with a pre-application, or send an email to any member of our Impact Team.



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