



Strategic Roadmap

Frequently Asked Questions

Q: What do you mean by the term “strategic roadmap?”

A: The John Rex Endowment believes that “strategic roadmap” is the best description of the journey we are now taking as an organization. More flexible than a strategic plan, our [Strategic Roadmap](#) will serve as a framework for us as we explore approaches to reaching our desired impact to ensure children and their families are safe, healthy and living to their full potential.

Q: What is the main difference between the new Strategic Roadmap and the John Rex Endowment’s *Our Plan for Impact: 2013-2018*?

A: Like many national, statewide and regional philanthropies, the John Rex Endowment is embracing a learning position with the social and environmental challenges of our communities. Guided by the [Strategic Roadmap](#), we will explore the issues that relate to the health and safety of vulnerable children and their families, issues that are deeply intertwined and cannot be realistically separated into distinct funding areas as they were in *Our Plan for Impact*.

Just as nonprofits are learning how to be nimble and flexible in meeting the needs of those they serve, the philanthropic sector, including the Endowment, is changing as well. However, this does not mean that we are altering our guiding principles of grantmaking. Those principles still call upon us to:

- Focus on prevention;
- Support promising and proven practices;
- Address the connected and diverse factors that influence children’s well-being; and
- Commit to and deepen our understanding of health equity.

Q: How did the Endowment create the Strategic Roadmap?

A: As is our practice, we began a multi-level process in 2017 to assess the Wake County landscape for children and their families. We sought to verify, validate and learn what assets and challenges families and children face every day.

The process showed us that for Wake County children and their families to be safe, healthy and living to their full potential, the Endowment must continually and actively learn and grow in these ways:

- We must enhance our knowledge of how to view problems and potential solutions with the recognition that everyone has a fair and just opportunity to be healthier.
- We must grow our understanding of what it means for our foundation to be a courageous champion for children.
- We must work together with our community to align efforts that keep children and families at the center of our work.

As a result of this multi-level process, we created the [Strategic Roadmap](#) and will begin implementation in January 2019.

Q: What is the timeline of the Strategic Roadmap?

A: The Endowment has learned in our research that to be effective, we must make a long-term commitment if we are to fully ensure that Wake County children and their families are safe, healthy and living to their full potential. We expect this [Strategic Roadmap](#) to guide our work for the foreseeable future.

Q: What does the new Strategic Roadmap mean for your funding cycles?

A: The John Rex Endowment will have three funding cycles in 2019.

- On January 9, 2019 we will release a Request for Proposals (RFP) which will detail the first funding opportunity, related strategies and eligibility criteria. The opportunity will align with a theme/s identified by the [Wake County social determinants of health assessment](#) that we released earlier this year.
- The second opportunity of the year will be announced in May 2019. Available funding in this cycle will continue helping nonprofits build capacity.
- The final grant cycle focus will be announced in September 2019.

You can track the release of the RFPs via our newsletter, website and Facebook page.

Q: How much grant funding do you expect to distribute each year under the new Strategic Roadmap?

A: We expect to disburse in the range of \$2 - 3 million per year which is comparable to our average annual funding in prior years. Each Request for Proposals will include information about the amount available for that specific funding opportunity.

Q: What does the Strategic Roadmap mean for grantees currently receiving funding as the result of a previously awarded grant, or applicants who are waiting to hear about a grant award?

A: All current grants as well as those that are awarded in October 2018 will continue to receive funding according to the terms of the grant award.

Q: Can I speak with the Endowment about an idea I have for a project I believe is a fit with the Strategic Roadmap?

A: Our door has always been and continues to be open for conversations that will help us learn more about an organization's mission, current interests and activities. These engagements also provide individuals an opportunity to learn more about the Endowment and how we work with organizations. We will also meet with individuals to keep us informed about significant issues in Wake County, and/or with those who are contemplating a new direction in their work and would like to hear our perspective.

We will continue our practice of considering specific requests for funding through our Request for Proposals and application process. As we implement the [Strategic Roadmap](#), at times we may solicit applications from specific organizations based on the specialized nature of the work to be done and our knowledge of an organization's expertise. In every case, our application process facilitates our ability to determine if a project is a fit with specific funding interests.

Q: Will the John Rex Endowment engage in approaches other than grantmaking?

A: Our core strategy is grantmaking; however, we've learned over time and through our assessment and conversations with the community and nonprofit leaders that we can have greater influence on our desired impact by expanding strategies beyond grantmaking. As guided by the [Strategic Roadmap](#), we will be a more actively engaged partner using our expertise and reputation. Examples of approaches will include influencing conversations; advocating on behalf of vulnerable children and their families; using communications to amplify the voice of others; providing funding; and strengthening partnerships.

Q: How do you expect to measure the impact of the Strategic Roadmap?

A: A focus on learning is a core tenet of the John Rex Endowment. We use it as a quality improvement tool for ourselves and for our grantees in planning and implementing projects, as well as to monitor progress. We will evaluate how our grants and other endeavors are serving our goals to develop and strengthen:

- Courageous champions for children who will stand up and stand together to make tough decisions and take bold actions on their behalf;
- Strong organizations working together across sectors to address the needs of children and their families; and
- Community settings where children and their families thrive.

Q: Did *Our Plan for Impact: 2013-2018* achieve the impact you sought and in the areas you targeted, and will you share the results of those investments?

A: We are confident that the resulting projects had a major impact upon select areas of child health and well-being. We are proud to report that from 2013 through September 2018, the Endowment awarded \$16.9 million in grants to 52 organizations. That said, more than half of these awards are still active. Grant awards made under *Our Plan for Impact* are still being evaluated. We will share our results with our grantees and the community when we have a more complete picture of what has been achieved.

One results publication that was produced as part of *Our Plan for Impact* is already available to the community. Entitled “[Local Governments as Health Champions](#),” it relates the findings of six municipalities who created healthier environments for children by increasing access to healthy foods and active living opportunities.

Q: What if we still have questions about the Strategic Roadmap?

A: For questions regarding the Strategic Roadmap, please [email Kellan Moore](#), President and CEO, or call her at 919-838-1110 extension 3.