

towards social and economic mobility *through lived experience*

A case study of the impact of unrestricted grantmaking to United Community

Denise Bellows, PhD / August 2024

With support from staff at United Community and reviewers at the Community Foundation for Northern Virginia



Pictured on the cover: Lived Experience Consultants in the Commun1ty+ Safety workgroup prepare for a community walkabout to raise awareness about the need for repairs to street lights and sidewalks

ABOUT THE COMMUNITY FOUNDATION FOR NORTHERN VIRGINIA

Founded in 1978, the Community Foundation has been the premier charitable partner trusted by thousands of generous Northern Virginians for decades. Our mission is to advance equity through philanthropy and community leadership. Comprised of donor advised funds, permanent funds, giving circles, and other charitable endowments, the Community Foundation's vision is to build a community that works for everyone. Our Community Foundation serves the entire region, including Arlington, Fairfax, Loudoun and Prince William Counties and the Cities of Alexandria, Fairfax, Falls Church, Manassas and Manassas Park.

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ABOUT INSIGHT REGION[®]

Launched in 2020, Insight Region[®] is a research center at the Community Foundation for Northern Virginia that analyzes local trends, convenes civic leaders, and promotes civic and social action. It is a growing hub for reliable, well-researched, and actionable data and analyses on issues critical to Northern Virginia.

Its work is focused within the Community Foundation's four strategic priorities: promoting social and economic mobility, advancing racial justice and equity, supporting inclusive systems of economic growth, and strengthening community resilience.

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AN INSIGHT REGION[®] REPORT

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executive summary



Fostering trust between the Community Foundation and nonprofits to maximize community impact

In alignment with our strategic priority to improve social and economic mobility in Northern Virginia, the Community Foundation for Northern Virginia (Community Foundation) has embraced the growing momentum towards trust-based philanthropy in our grantmaking. Developing trust with community takes time and resources that are not typically prioritized in program-specific grants. Our trust-based approach to grantmaking has allowed nonprofits to support programs or initiatives that foster deeper community engagement. Over a three-year period, the Community Foundation's [Lamond Fund to Benefit Children and Youth](#) invested \$200,000 in United Community through unrestricted, multi-year grants. With these unrestricted funds from the Community Foundation, [United Community](#) pursued an innovative, theory-based Lived Experience Consultants (LEC) initiative to understand the community along the Route 1 corridor in Alexandria and Fairfax County, helping build trust and provide deeper access to community supports.¹ The LEC initiative demonstrated impact on LEC participants, the community, and United Community, itself.



THE ROUTE 1 CORRIDOR IN ALEXANDRIA AND FAIRFAX COUNTY

The Lamond Fund of the Community Foundation provides grants to promote social and economic mobility of children and youth along the Route 1 corridor. As identified in a 2021 Insight Region[®] report, [Spreading the Wealth](#), this geographic region experiences low levels of social and economic opportunity, compared to other communities in Northern Virginia.



Acknowledgements: Insight Region[®] would like to thank those who contributed to this work. From United Community, Ivanna Escobar provided thought leadership and contributed to the development of data collection protocols, Ryan Thompson continued to move this effort forward by reviewing early drafts and coordinating with Lived Experience Consultants and other colleagues, Steve Luteran provided helpful information, and Leah Fraley was quick to provide thoughtful responses to our questions. From the Community Foundation for Northern Virginia, Insight Region[®] would like to thank Sari Raskin, Renée Byng Yancey, and Tara Nadel for thought leadership on this report and critical feedback during review of early drafts. We would also like to thank Amanda Bomfim for her expertise in the final report design. Finally, we would like to acknowledge contributions to data collection, analysis, and writing by our summer intern, Dania Sharifi.

¹ This initial investment included a \$50,000 matching grant from [Tax Equity Funders](#). For more information, see: [Community Foundation Receives National Grant to Support Access to Child Tax Credit Along Route 1 | The Community Foundation for Northern Virginia \(cfnova.org\)](#)

a trust-based approach

to community giving



Opening doors to achieve long-term, widespread impact

The movement towards trust-based community giving gained momentum during the Covid-19 pandemic when the ability of service-providing nonprofits to respond to the shifting needs of their community became a matter of life and death.¹ In the United States, over 600 foundations loosened restrictions to allow grantees to respond to urgent, pandemic-related needs.² Beyond the ability to respond to changing needs during the Covid-19 pandemic, the shift towards trust-based philanthropy counters the “starvation cycle” known to many nonprofits. The starvation cycle is the chronic underfunding of nonprofits’ indirect costs, including capabilities essential to achieving impact such as executive leadership, information technology, strategic planning, and knowledge management.³ The Center for Nonprofit Excellence’s 2023 Virginia Nonprofit Sector Report recommended providing unrestricted core support so that nonprofits can fully fund the operations that sustain programs.”⁴ In 2024, reports from the Bridgespan Group and an impact study of MacKenzie Scott’s giving have found that the shift to providing funding with fewer restrictions has unleashed new energy, capability, and innovation into the nonprofit sector.^{5,6}

IMPACT OF TRUST-BASED PHILANTHROPY

The peer-reviewed literature is rich with proven strategies for evaluating the impact of unrestricted funds.^{7,8} Providing general operating support to grantees has resulted in significant progress towards accomplishing goals, strengthening infrastructure, securing financial footing, pursuing risk management, and creating flexibility to deal with unpredictable operating environments.⁹ Unrestricted funds provided to United Community have:

- Supported the expansion and improvement of programs and services, enabling greater reach to more community members.

- Enhanced program quality to achieve greater impact in addressing community needs.
- Improved effectiveness and efficiency by supporting day-to-day operations (i.e., staff salaries, rent, utilities, and administrative costs) and capacity-building (i.e., staff training, technology upgrades, and organizational development efforts).

United Community has also credited these funds with allowing them to cultivate a positive work culture for employees. This is significant at a time when 74 percent of nonprofit organizations are reporting worker shortages, often due to employee burnout.¹⁰ United Community Chief Executive Officer, Leah Fraley, shared,

“Unrestricted funds reduce financial constraints and uncertainties, allowing our team to focus on their work with a sense of purpose and confidence. This, in turn, fosters a collaborative, innovative, and mission-driven work environment where staff feel motivated and valued.”

Unrestricted funding provides nonprofit leaders with financial security and autonomy. It limits bureaucracy and allows nonprofits to be flexible and agile in their response to crisis and other changing social dynamics. In this way, trust-based philosophy addresses power imbalances between funders, nonprofits, and communities they serve.¹¹

74% of nonprofit organizations are reporting worker shortages¹⁰



the value of lived experience

IN COMMUNITY INITIATIVES



Engaging those with lived experience fosters alignment of community resources with the most critical community needs

The role of Lived Experience Consultant (LEC) is born out of a movement in community health which recognizes the critical role of early and sustained engagement for any community intervention. Other similar programs include Community Health Workers¹², Promotoras¹³, and Patient Ambassadors.¹⁴ In the past year, the U.S. Department of Health and Human Services Office of the Assistant Secretary for Planning and Evaluation (ASPE) invested in building federal capacity to engage people with lived experience to better inform and improve systems, research, policies, practices, and programs.¹⁵ This demonstrates how **United Community is at the forefront of a movement that is gaining momentum.**

THE LIVED EXPERIENCE CONSULTANTS AT UNITED COMMUNITY

United Community believes in family participation and engaging community voice. With funds from the Community Foundation, they developed the Lived Experience Consultants (LEC) initiative. The LEC initiative allows United Community to align resources to support communities based on needs expressed by community residents. While it may be time consuming and resource heavy, the benefits of the LECs long-term impact outweigh the cons of the short-term investment.

United Community achieves the greatest impact when they listen to the lived experiences of the community they serve and allow their voices to inform and lead community service programs. The success of the LEC initiative inspired the design of [Communitiy+](#), where LECs have leadership roles in the initiative's five working groups: Children and Youth Wellbeing, Economic Opportunity, Health, Neighborhood

Livability, and Safety. Within each workgroup, two or three LECs collaborate with government officials, academics, and the business community to work towards addressing a pressing social need. An initial challenge LECs may encounter is difficulty speaking up to those in power. However, through the process of creating and implementing action plans, LECs gain confidence as their voice is heard by community leaders who also gain perspective and understanding from the LECs.

“Even when you feel intimidated to speak up, it is always good to do it.”

- Juana Cruz

The Lived Experience Consultant Initiative.

To become a Lived Experience Consultant, one must complete a rigorous intake process, which includes a written application and interviews, and show their readiness to take part in long-term community change. Once selected, United Community provides professional development opportunities to LECs, such as [Storytelling Classes by Story District](#), and research training by [George Mason University's Center for Social Science Research](#). LECs receive financial compensation for 14 hours of community service per month for two years, which includes surveying their community about pressing needs.

impact of the LIVED EXPERIENCE INITIATIVE



To learn more about the Lived Experience initiative, we interviewed five of the nine LECs who had more than two years of experience in these initiatives. We learned about the impact on LECs personal and professional growth, the impact on community social needs, and the impact on United Community.

IMPACT ON PERSONAL AND PROFESSIONAL GROWTH

The LECs we interviewed described how their community leadership role has led to personal growth and helped them develop transferrable professional skills. They have credited this personal and professional growth to training provided through United Community programs and mentorship from United Community staff and other community leaders in the Commun1ty+ initiative. Skills developed through training as an LEC include leadership, project management, critical thinking, problem solving, research, analysis, communication, and public speaking.

All five LECs shared specific examples of how they have grown. For example, Iveth Perez said she has grown from shy and timid to confident. Lisa Washington shared a similar story of coming out of her shell through the LEC role:

“At one time I was very bashful, and I couldn’t speak in front of a lot of people. I would start stuttering. But when I started doing community ambassador stuff and some of their courses...the classes that they had - it helped me as well.”

- Lisa Washington

Both Lorena Cheverria and Juana Cruz described finding their voice as an LEC. They also enjoy how the leadership role has drawn others to them. Iveth Perez described the positive reaction from her son and how he was proud of her community leadership role. All LECs described feelings of accomplishment, gratitude, and satisfaction as they addressed the needs of their communities.

IMPACT ON COMMUNITY NEEDS THROUGH COMMUNITY+ WORKGROUPS

The activities resulting from the Commun1ty+ initiative provide the most visible impacts of the work of LECs. Through interviews with LECs in three of the fiveⁱⁱ Commun1ty+ workgroups, we learned of community improvements in safety, health services, and neighborhood livability. In the Safety workgroup, LECs surveyed neighborhood residents on the topic of neighborhood satisfaction, safety, and ideas for improvement and responded to their concerns with action.ⁱⁱⁱ In the



Health Services workgroup, LECs told workgroup members about community barriers to healthcare (i.e., transportation, limited health insurance, and limited ability to afford care) and advocated for mobile health services. The Neighborhood Livability workgroup surveyed more than one hundred community residents about their greatest concerns and responded to the most pressing issues. Table 2 shows the response from the Commun1ty+ workgroups to the community concerns reported.

ⁱⁱ While the Commun1ty+ program includes 5 workgroups (i.e., Children and Youth, Health Services, Economic Opportunity, Neighborhood Livability, and Safety), the individuals we spoke with represented three workgroups: Safety, Health Services, and Neighborhood Livability.

ⁱⁱⁱ The LECs were able to develop the survey using their own words, which would resonate with their neighbors. They also had training on best survey practices from [George Mason University’s Center for Social Science Research](#).

Table 1.

LECs responses to concerns raised by community members, by Commun1ty+ workgroup

Workgroup	Concern reported	Response by LECs in the Commun1ty+ workgroup
Safety	Street lighting, sidewalk maintenance, road safety	The workgroup held a walkabout, after dark, with their elected officials ^{iv} and twenty community members. The walkabout showed how dark it is without streetlights and how dangerous it is for pedestrians and children, especially on high-speed roads with no lights and no crosswalks. Within a few months, the walkabout was documented in a report and the lights in the neighborhood were repaired.
Health Services	Barriers to healthcare access	The workgroup hosted a Diabetes Wellness Fair where attendees received free glucose level testing and referrals to other services.
Neighborhood Livability	Inability to use a wheelchair or walker on the sidewalks to access groceries and other necessities; Lack of access to fresh produce; Access to information	The workgroup: <ul style="list-style-type: none">• photographed areas of sidewalks in need of repair and shared them with their local government, resulting in plans to make \$50,000 worth of sidewalk repairs.• directed homeless and working poor to accessible food pantries and supported the establishment of a local farmers market.• connected neighbors to Medicaid providers and hosted a Back-to-School event to share information about school registration and provided backpacks of school supplies to those in need.

IMPACT ON COMMUNITY SOCIAL NEEDS THROUGH INDIVIDUAL LEC ACTIVITY

The impact of LECs extends beyond the activities of the Commun1ty+ workgroups. At United Community, LECs respond to needs echoed by their peers and neighbors. For example, LECs at United Community have connected community members to their elected representatives and other public officials who can help to address community concerns. They also advocated successfully for language interpreters at public community meetings. With the Community Foundation’s initial investment, LECs raised awareness about the earned income tax credit, the child tax credit, and the value of Census participation.

The LECs we interviewed shared that their experiences with United Community empower them to respond to ad hoc needs of community residents. They can respond to community needs because they relate to their neighbors and are trusted with valuable information. Lisa Jones

explained, “You don’t find out information about what’s going on in the community without us.” Several LECs expressed that the ability to share resources and information is critical to address disparities. Juana Cruz shared, **“I’ve learned a lot about all the disparity that we have. Sometimes people don’t have the information, ... they are too scared to go or to trust or who to ask. I want to be the voice for these families to advocate to bring these resources for them.”**

United Community provides resources in many languages. LEC, Lisa Jones, explained that she uses an app on her phone to try to communicate in other languages (Spanish, Ethiopian, Pakistani, Japanese, Korean) with those who are in need. Lisa said, “I even try to communicate with sign language. I am so determined to help!”

^{iv} Representatives from the offices of Jeff McKay and Senator Scott Surovell participated in the walkabout.

IMPACT ON UNITED COMMUNITY

Beyond the impact on the community and the LECs themselves, the LEC initiative has influenced the way United Community develops programs and policies. Regular engagement with LECs has helped to identify gaps in services, highlighted areas for improvement, and ensured that initiatives are more responsive and relevant to the community's actual needs. By incorporating these perspectives into decision-making processes, United Community has been able to enhance the impact and reach of its programs.

Engaging with LECs has also fostered a culture of inclusivity, empathy, and empowerment within United Community. By valuing and uplifting the voices of those with lived experiences, the organization has demonstrated a commitment to equity, diversity, and social justice. This not only strengthens relationships with the community but also builds trust and credibility for United Community as an organization that genuinely cares about the people it serves.

Current CEO, Leah Fraley, has shared how LECs have shaped the strategic direction of their organization:

“The work of our LECs has had a profound impact on United Community by bringing valuable insights, diverse viewpoints, and real-life narratives to the table. The LECs have helped United Community gain a deeper understanding of the challenges, needs, and aspirations of those we serve. By sharing their firsthand experiences and stories, the LECs have shed light on issues that may not have been apparent to us and would surely not be gained by a purely data-driven or theoretical perspective.”



Pictured above: Lived Experience Consultants in the Commun1ty+ Safety workgroup prepare for a community walkabout to raise awareness about the need for repairs to street lights and sidewalks



conclusions

Building a community that works for everyone

In pursuing our strategic goals of economic and social mobility, the Community Foundation is working to build a community that works for everyone. By taking part in the movement towards trust-based philanthropy through unrestricted grantmaking, the Community Foundation is prioritizing funding in a way that truly supports nonprofits and is responsive to their needs. This \$200,000 multi-year grant to United Community is a model of a stronger partnership with the nonprofit leadership, a deeper connection amongst community members, and better access to community services in an underserved area, the Route 1 Corridor in Alexandria, and Fairfax County.

The Community Foundation and United Community are making stronger connections with community and having greater impact on social and economic mobility by embracing the voice of those with lived experience. The five LECs we interviewed explained that their lived experiences enable them to understand community issues, gain the trust of community members, and respond to community needs. Though the LECs may come from different experiences – whether it be with immigration, parenting, homelessness, or lack of resources – they all add value and experience a level of fulfillment in giving back to the community. Their ability to empathize with fellow community members, engage without judgement, speak their language, and understand community challenges facilitates initiatives that are likely to have lasting community impact.

“I can't say enough about the value of lived experience. There is nothing in the world that moves a conversation to more innovative thinking faster than the voice of someone who knows the old way simply doesn't work!”

- Leah Fraley, CEO of United Community



inspired to get involved?

HERE'S WHAT YOU CAN DO.

Current donors can consider converting their funds to endowments or permanent funds.

United Community was able to implement the LEC initiative because of unrestricted funding from the Community Foundation's [Lamond Fund to Benefit Children and Youth](#). As an endowed fund maintained by the Community Foundation, the Lamond Fund will help this region forever! To learn more about establishing endowments or permanent funds with the Community Foundation for Northern Virginia, reach out to [Senior Director of Development, Patricia Eisner](#).

Prospective donors can invest in service-oriented organizations that engage community and allow them to lead.

If you would like to learn more about organizations that have adopted a model of listening to community and engaging them in addressing social and economic needs, consider reaching out to our [Vice President of Grants and Community Leadership, Sari Raskin](#) or donating to United Community, [here](#).

Community members with lived experience to share.

If you would like to participate in the LEC initiative, contact United Community [here](#). Beyond the initiatives at United Community, those who would like to share their lived experience and use it to benefit their community may consider an official certification to become [Community Health Workers in the state of Virginia](#).¹⁶ Community Health Workers apply their unique understanding of experience, language, and culture of populations to: 1) provide culturally appropriate information and education, 2) connect people to services and resources, and 3) advocate for individual and community needs to build community capacity.

Funders can practice trust-based philanthropy.

The Trust-based Philanthropy Project has shared some key insights for funders attempting a shift towards unrestricted funding:¹⁷

1. Offer the Board of Directors the opportunity to embrace change. Consider sharing research on trust-based philanthropy prior to discussing a new model of grantmaking.
2. Focus on contribution over attribution. It is effective to invest flexible dollars in organizations and learn with the organization about solutions. View the grant as investment in improved outcomes, rather than a purchase of specific outcomes from restricted funds.
3. Examine how risk is defined in funder-grantee relationships. Rather than thinking about the risk to the funder, consider the risk to the nonprofit and their community (e.g., How are funders inadvertently reinforcing inequities with their thinking about risk and trust in the relationship?)
4. Lean on values to show you the way forward. Take the time to articulate your core values and bring your grantmaking processes into alignment with those values.

thank you

TO THE LIVED EXPERIENCE CONSULTANTS WHO CONTRIBUTED TO THIS CASE STUDY!

Juana Cruz

My name is Juana Cruz, and I am a proud Mexican who has lived in the United States for 25 years. I was looking for resources when I came across Opportunity Neighborhood Mount Vernon where I became an ambassador. I became a Lived Experience Consultant and joined Commun1ty+ because I would be able to share the needs and concerns of Buckman Loop communities while helping others, as doing so with love brings God's blessings your way. It is very satisfying for me to raise my voice and advocate for families who may not be able to because of language barriers, immigration status, or lack of information. My husband, my three sons, and I are grateful to call Route 1 our home.



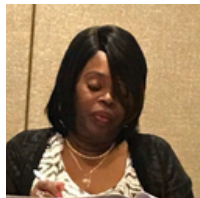
Lorena Chavarria

My name is Lorena Chavarria. I was given the opportunity to volunteer for United Community and serve as a Sequoyah Community Ambassador after I had volunteered in the schools. I became a Lived Experience Consultant and got involved in the Commun1ty+ Safety workgroup where I have been able to be the voice in the community in many ways: by sharing resources, conducting community activities, participating in programs, and empowering the community about how they can seek help when they need it. I hope to continue helping and collaborating in community improvements as a Sequoyah resident with my three children.



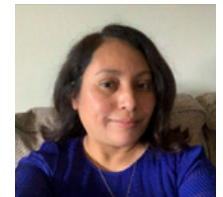
Lisa Washington

My name is Lisa Washington. Growing up experiencing homelessness myself, I understand the uphill battle in breaking the cycle of poverty and housing instability. Despite this, I am focused on my family and paving a way for a brighter future as a Lived Experience Consultant. My passion for leveraging resources to uplift my community has led me to become the co-chair of the Neighborhood Livability workgroup at United Community. I have worked with county representatives to dismantle barriers and foster inclusivity. I know that the power of my voice is effecting positive change towards a more equitable and supportive community for all. I hope to leave a mark on Richmond Highway and beyond, as I have been able to call Richmond Highway home for the past nine years.



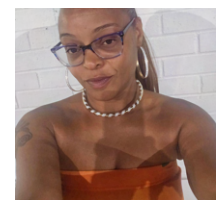
Iveth Perez

My name is Iveth Perez. I started volunteering with United Community when the pandemic started. I really like interacting with the community and was interested in learning about the programs around me. This is what led me to become an Ambassador for Opportunity Neighborhood Mount Vernon. After leadership training and community events from that program as an ambassador, I became a Lived Experience Consultant and joined the Health Working Group of Commun1ty+. I am still using my training from being an ambassador to help and give back to my community as a part of the Health Work Group.



Lisa Jones

My name is Lisa Jones. After my personal experience with homelessness and limited access to community resources, I realized the need to involve myself in empowering the community. I became a Lived Experience Consultant and have since become a United Community Board Member and Secretary, a COMMUN1TY+ Co-Chair for the Safety Working Group. Further, I have worked at the Fairfax County Department of Family Services, the Racial Equity Action Council, and the Continuum of Care Committee. I have two master's degrees in management, human resources, and business and am currently working on my Doctor of Human Services degree at Capella University. I reside in the Buckman Loop area with my daughter and granddaughter.



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