

MAPPING THE MONEY IN THE SYSTEM

Identifying funding sources in your geographic and programmatic area is a critical first step in establishing a local wellness fund. “Sources” include any entity that offers direct funding or acts as a secondary distributor of funds. This tool is intended to help you map your funding landscape and uncover new and innovative sources.

PURPOSE

- To create an inventory of known, existing funding sources
- To encourage users to uncover new and innovative sources of funding

INSTRUCTIONS

We recommend you complete the Stakeholder Mapping Tool before using this tool. The Stakeholder Mapping Tool allows you to map all your stakeholders, including those that provide funding. After mapping your stakeholders, you can use this tool to organize and categorize potential funding sources. Once you have mapped the sources in your funding landscape, you can add them to your stakeholder list.

The tool has five sections based on sector:

1. Governmental funding
2. Health care sector funding
3. Private sector funding
4. Philanthropic (foundations) and volunteer (nongovernmental organizations) sector
5. Other sources

Groups can approach the tool in several ways:

- Groups may choose to use the tool as a first step in brainstorming.

¹ *What is community benefit?* Community Benefit Connect. www.communitybenefitconnect.org

- Groups may choose to provide the tool in advance of group discussions so members can bring their ideas to the discussion.
- Groups may ask their members to research specific sources or source types (state or federal government, nongovernmental organizations, community-based organizations, private-sector businesses, and individuals) in advance of discussion.

Your “funding landscape” will include a number of familiar funding sources, but we encourage you to use this tool to seek out new and innovative sources. Your group will need to determine how you will identify new sources. Some strategies may include:

- Speaking with partners, colleagues, and friends
- Searching the internet
- Conducting structured interviews with fundraising experts in your area or field
- Inviting external stakeholders to participate in the financial landscape mapping process or asking them to provide input once you have a draft

Complete the tables by providing:

- Funding source
- Type of source, for example

Catalytic capital	Dedicated public revenues (taxes)
Grants	Health care payment model
Loans	Mandates
Donations	Reinvestment
Corporate social responsibility	Public appropriations

- Sectors the source has funded in the past (housing, nutrition, built environment, etc.)
- Examples of the projects they have funded in the past, if known
- Estimated size of the source’s total investment
- Definition of your group’s existing relationship with the source

NEXT STEPS

1. Once you have completed the tables, consider inviting a larger group of stakeholders to review them and provide input.
2. The tables capture each source’s type and the sectors they fund. This information should be considered when developing marketing materials. The language, format, and platforms you use may vary considerably depending on the stakeholder.
3. The far-right column in each table allows you to characterize your existing relationship with each source. This information will be useful as you develop your fundraising plans. Your marketing strategy will vary depending on the status and nature of your relationship.
4. Your relationship with funding sources will change over time. Consider appointing one or more people in your group to manage your relationships with funders and keep the rest of the group up to date on those relationships.
5. Your funding landscape will change over time. It is important to revisit your list of sources on a regular basis. Consider appointing one or more people in your group to keep up with funding trends relevant to your work.

Table 1. Government Funding

List all the known local, state, and national government funding opportunities. Think beyond grants and consider tax revenue sources, credits, trusts, etc. in the community that could possibly be tapped (low-income housing tax credit, new market tax credit, marijuana taxes, soda taxes, etc.).

WHO IS FUNDING ...	... WHAT, AND ...	... HOW MUCH ARE THEY INVESTING, AND ...	... WHAT IS OUR EXISTING RELATIONSHIP?
Source	Type of Funding (grant, tax credit, tax revenue, etc.)	Sectors funded	Examples of funded projects
			Estimated size of investment
			Existing relationship between the source and the organizations or individuals involved with the local wellness fund

Table 2. Health Care Sector Funding

Consider all opportunities related to Medicaid, Medicare, Children’s Health Insurance Program, community benefit obligations, etc..					
WHO IS FUNDING ...	... WHAT, AND ...	... HOW MUCH ARE THEY INVESTING, AND ...	... WHAT IS OUR EXISTING RELATIONSHIP?		
Source	Type of Funding (community benefit and other mandates, value-based payments, etc.)	Sectors funded	Examples of funded projects	Estimated size of investment	Existing relationship between the source and the organizations or individuals involved with the local wellness fund

Table 3. Private Sector Funding

List all the businesses, consortia and employers who have given back to the community by way of investment.				
WHO IS FUNDING ...	... WHAT, AND ...	... HOW MUCH ARE THEY INVESTING, AND ...	... WHAT IS OUR EXISTING RELATIONSHIP?	
Source	Type of Funding (donations, loans, etc.)	Sectors funded	Examples of funded projects	Estimated size of investment
				Existing relationship between the source and the organizations or individuals involved with the local wellness fund

Table 4. Philanthropic and Volunteer Sector

Consider foundations, nongovernmental organizations, community-based organizations, individuals, charitable groups, etc.

WHO IS FUNDING ...	... WHAT, AND ...	... HOW MUCH ARE THEY INVESTING, AND ...	... WHAT IS OUR EXISTING RELATIONSHIP?
Source	Type of Funding (grants, donations, etc.)	Examples of funded projects	Existing relationship between the source and the organizations or individuals involved with the local wellness fund

Table 5. Other

List sources you know not listed above – be creative! (Crowdsourcing, local or state initiatives, etc.)

WHO IS FUNDING ...	... WHAT, AND ...	... HOW MUCH ARE THEY INVESTING, AND ...	... WHAT IS OUR EXISTING RELATIONSHIP?
Source	Type of Funding	Sectors funded	Examples of funded projects
		Estimated size of investment	Existing relationship between the source and the organizations or individuals involved with the local wellness fund