

IE  HHP

Foundation

We inspire and ignite the health of the Inland Empire.

Champions for Vibrant Health Leadership Network – Volunteer Training

Sara Omari, Strategy Program Administrator

July 9, 2024

Why Volunteer?

- There is a lot of information in this training; however, IEHP Foundation staff will provide support each step of the way!
- This volunteer opportunity allows IEHP team members to act on IEHP's vision that "We will not rest until our communities enjoy optimal care and [vibrant health.](#)"
- Volunteers will evaluate applications to help IEHP Foundation deliver on our mission and award over \$2 million to local nonprofit organizations
- Be part of IEHP Foundation's history as our first set of volunteers for our first-ever competitive grant application process

Volunteer Training Overview

- **IEHP Foundation Overview: Mission, Vision, Values and Strategy**
- **Champions for Vibrant Health Leadership Network: Opportunity Overview**
- **Volunteer Expectations: Timeline and Commitment Expectations**
- **Grant Management Portal: Access and Navigation**

A recording of this webinar will be available on the Foundation JIVE page within 3 business days. A follow-up email will also be sent to those who registered for the call with a link to the recording and copy of this presentation.

IEHP Foundation will provide all training necessary for a volunteer to be successful!

About IEHP Foundation

Igniting Vibrant Health in the IE

IEHP & IEHP Foundation: Working Together to Advance Vibrant Health



Advancing Vibrant Health in the Inland Empire.

IEHP Foundation is an independent 501(c)(3) designed to ensure all individuals in the Inland Empire have access to Vibrant Health — extending beyond traditional healthcare services and addressing the social determinants of health for the region's most vulnerable populations.

Inland Empire Health Plan (IEHP) is a local managed care health plan that serves 1.6 million members across Riverside and San Bernardino counties to provide them with access to Optimal Care and Vibrant Health.



Advancing Vibrant Health

Our Mission...

is to inspire and ignite the health of the Inland Empire.

Vibrant Health...

means that the residents of San Bernardino & Riverside counties have access to and are experiencing a better, more fulfilling life – overall physical & mental health & well-being.

Our goal...

is to advance greater health equity across the region by partnering with and strengthening community-based organizations and leadership by addressing:



Root Causes



Core Needs



Health Equity

Laying the Foundation for Vibrant Health: Investing in the Vital Conditions for Health & Well-Being



- Framework for social determinants of health (SDOH)
- Adopted by 40+ federal organizations and strong regional efforts to align on this framework

You do not need to be familiar with the Vital Conditions framework to volunteer.

This is for background information only.

Investing in Community for Improved Health Outcomes

To help achieve the promise of Vibrant Health in the Inland Empire, we will strategically invest in the strength of local community-based organizations through the following community investment strategies:



Public Policy & Advocacy



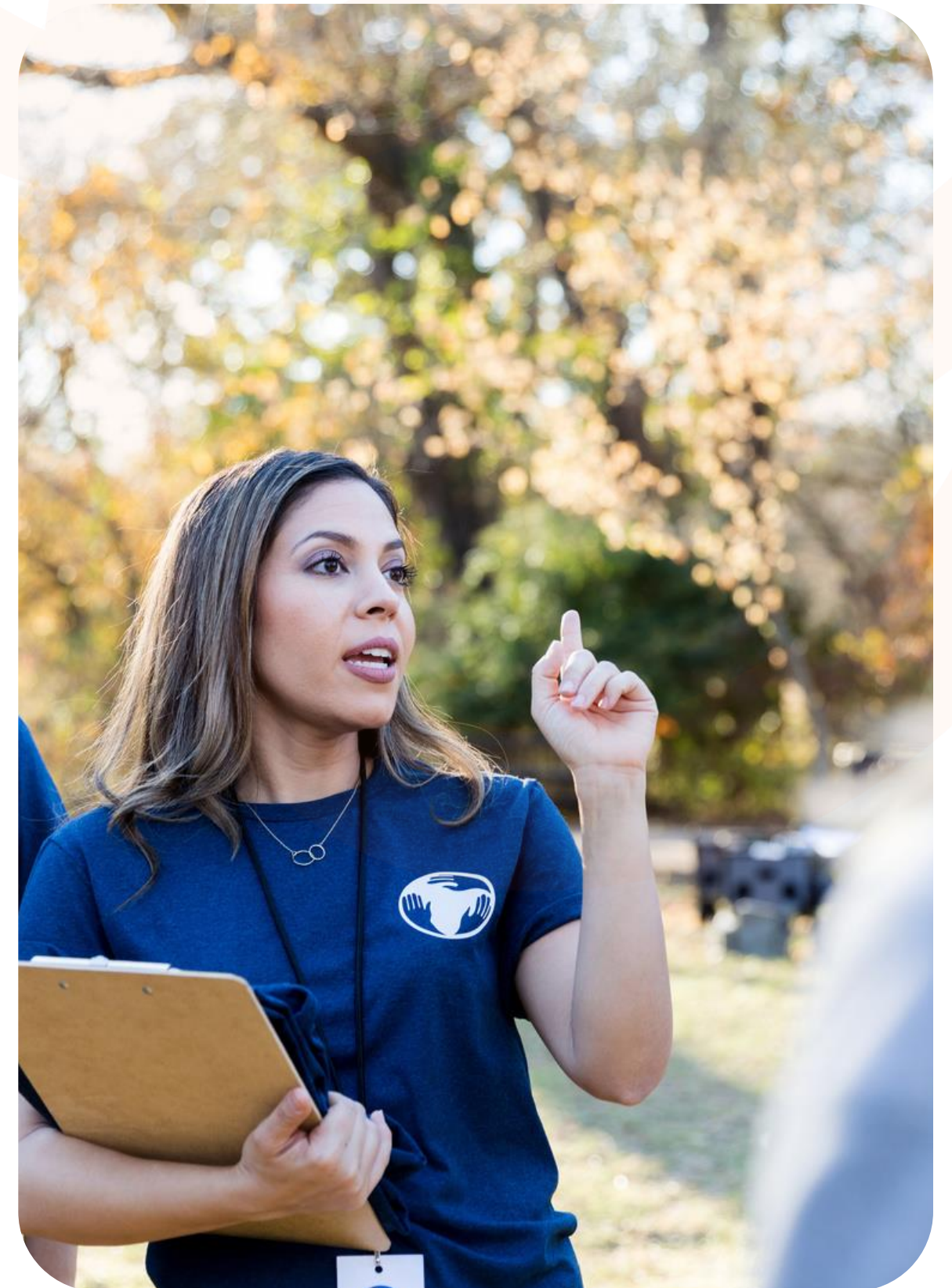
Regional Capacity Building



Direct Community Investment



Special Projects & Place-Based Projects



Become a Champion for Vibrant Health

The vital community partners who collaborate and engage with Foundation through trainings, grants and events, are considered as our:

Champions for Vibrant Health



Understanding Champions for Vibrant Health Leadership Network: Opportunity Overview

Summary

A two-year leadership development program, with general operating support funds, for Inland Empire community-based organizations that address the social determinants of health.

This opportunity is more than a grant — it's joining together to amplify our voices and expand resources to build vibrant health across the IE.

To become better acquainted with the eligibility requirements and what was shared with applicants, please reference the grants summary provided at

www.iehpfoundation.org/grants



Eligibility Requirements

In order for organizations to be eligible for this opportunity, they must have met the following eligibility requirements:

1. A public, 501c(3) nonprofit with up-to-date tax (Form 990) filings
2. Have been in operation as an officially recognized nonprofit for 3 years or more
3. Annual operating budget is \$250,000 or more
4. Identified an executive and emerging leader who has served the organization and/or the region for over a year
5. Serves families with children (18 years and younger) in the Inland Empire
6. Has a 2024 Candid Guidestar Seal of Transparency that is gold or platinum

*It is not the volunteer's responsibility to determine eligibility.
This will have already been completed by Foundation staff.*

What is being provided by IEHP Foundation?

- **Leadership Development**: An executive and emerging leader will receive leadership development training over the course of two years (2025 – 2026). Both leaders will be able to attend a leadership retreat each year., as well as various forums related to best practices for advancing health equity.
- **Policy & Advocacy Development**: Organizations will receive trainings on how to improve their policy and advocacy efforts. Both the executive and emerging leader will be able to travel to Sacramento once each year for an advocacy trip.
- **Flexible Funding**: Each organization will be awarded funding for general operating support over the course of two years:
 - Organizations with an annual operating budget under \$1M will receive up to \$50,000 over two years
 - Organizations with an annual operating budget over \$1M will receive up to \$150,000 over two years.

Goals & Key Measures of Success

- **Increased organizational capacity**, including strengthened intraorganizational leadership at multiple levels that promotes long-term, sustainable success.
- **Increased collective advocacy** leading to a regionally shared narrative that promotes health equity in the Inland Empire.
- **Expanded private and public funding** to the Inland Empire that improves regional capacity and sustainable sources of funding to local community-based organizations.
- **Expanded health equity** in the Inland Empire as community members' core health needs are met by being better connected with information, resources and services necessary for experiencing Vibrant Health.

In short, building the bench of nonprofit leadership/trusted messengers in the community & strengthening our region's advocacy muscle.

Application Process

- This is a two-part application process.
 - First Round: Organization
 - Second Round: Individual Leaders
- Volunteers will be helping IEHP Foundation staff identify which applicants should be invited to complete Round 2.
- Applicants had approximately one month to complete Round 1 applications.
 - June 13: Call for applications announced
 - July 15: Round 1 applications due

Up to 40 organizations in total will be selected for this opportunity.

Understanding Your Role: Volunteer Expectations

The background of the slide is a warm, orange-toned photograph of a person's hands typing on a laptop keyboard. The image is slightly blurred and has a soft, glowing effect, creating a professional and focused atmosphere.

Language Level-Set

Different organizations may use similar terms in different ways. For the purposes of IEHP Foundation's Champions for Vibrant Health Leadership Network opportunity:

- **Applicant:** The organization that has submitted a formal interest (via a completed application) for this opportunity.
- **COI:** Conflict of interest
- **GLM:** Grants Lifecycle Management – the online platform IEHP Foundation uses to manage all aspects of funding, including evaluations.
- **LOI:** Letter of Intent. Because of restrictions in GLM, this is the first-round application for this funding opportunity.

Iterative Design & Learning



- Applicants are completing their first-round applications as volunteers are being recruited. As such, the exact number of applications each volunteer will evaluate is TBD; however, the range is expected to be 5 – 10 applications per volunteers.
- This is IEHP Foundation’s first competitive application process, please be flexible and honest throughout your interactions with Foundation staff.

Volunteer Opportunity Overview

- Volunteers are committing to evaluate applications **outside** of their normal working hours.
- By successfully completing all volunteer expectations, IEHP team members will be awarded **10 applause points**.
- It is anticipated that this opportunity will involve **up to 12 hours** of volunteer time.
- Volunteering will be **asynchronous and can be completed remotely**. Volunteers must have access to a computer and internet connection.

Volunteer Key Dates & Deadlines

Below is an overview of key dates for volunteers. It is important to adhere to these deadlines to ensure that IEHP Foundation provides timely responses to the applicants regarding the status of their applications.

The following slides will explain each deadline in more detail.

- **July 16:** Last day to sign up to volunteer.
- **July 17:** Sara emails list of applicants to volunteers to identify any potential COI
- **July 19:** Conflict of Interest (COI) form due.
- **July 22:** Volunteer Assignments are shared.
- **August 2:** All evaluations due by 5pm PT
- **August 6 – 9:** Application Teams meet to discuss evaluations
- **August 16:** Application status shared externally
- **September 11:** Thank-You Volunteer Lunch

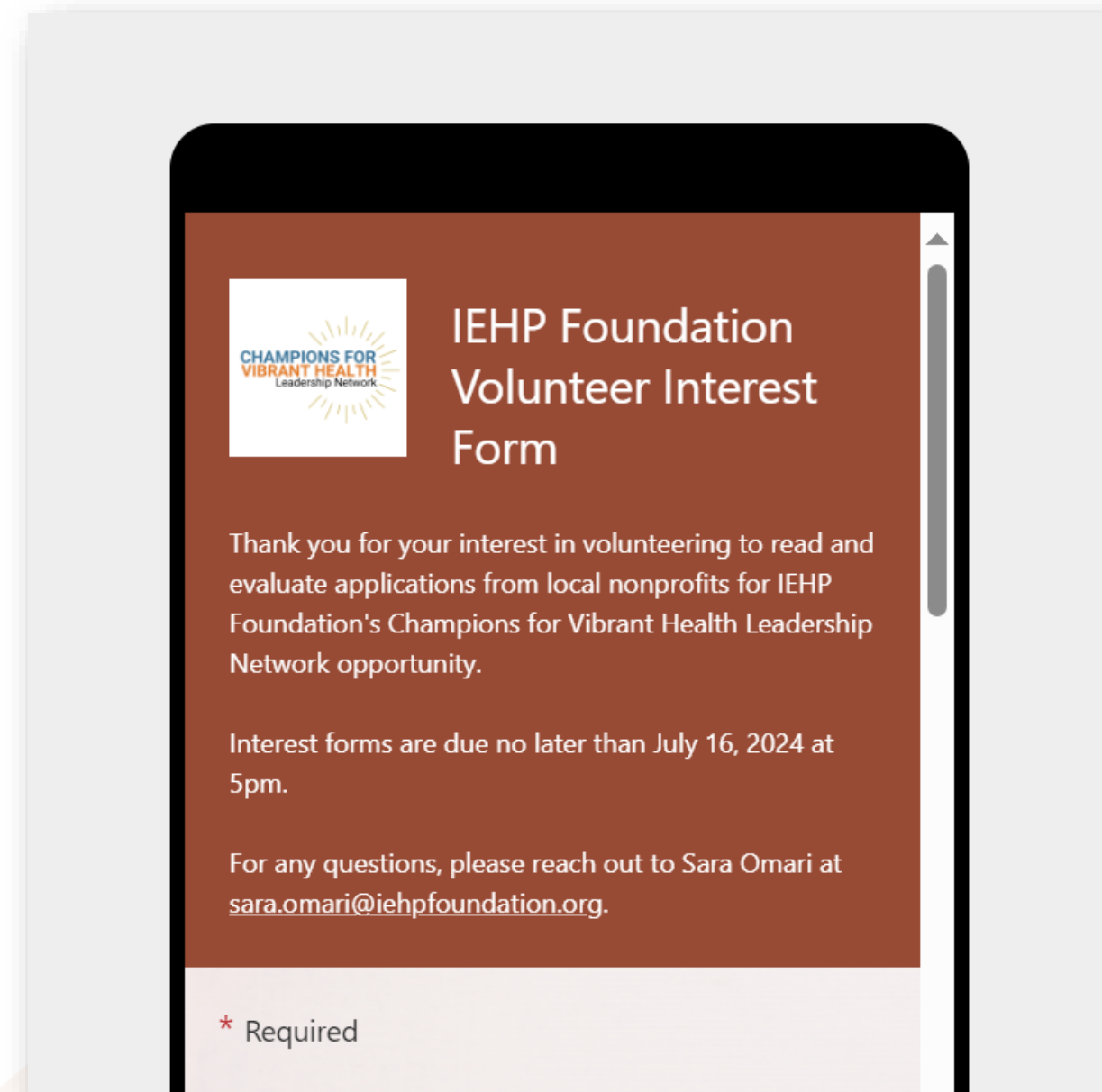


Calendar invites & reminder emails will be sent throughout the process.

Volunteer Sign-Up

- The last day to sign up to volunteer is **Tuesday, July 16, 2024 (5pm)**.

[Click here to submit your interest form](#)

A smartphone mockup displaying the "IEHP Foundation Volunteer Interest Form". The form has a dark red header with the "CHAMPIONS FOR VIBRANT HEALTH Leadership Network" logo on the left and the title "IEHP Foundation Volunteer Interest Form" on the right. The main body of the form is white and contains the following text: "Thank you for your interest in volunteering to read and evaluate applications from local nonprofits for IEHP Foundation's Champions for Vibrant Health Leadership Network opportunity.", "Interest forms are due no later than July 16, 2024 at 5pm.", and "For any questions, please reach out to Sara Omari at sara.omari@iehpfoundation.org". At the bottom left of the form, there is a red asterisk followed by the word "Required".

Conflict of Interest (COI)

- It is considered a conflict of interest if you have a financial, personal or contractual relationship with the applicant.
- Examples of COIs include, but are not limited to:
 - You have a family member that volunteers and/or is employed by applicant
 - You have donated to the applicant in the past
 - You volunteer with the applicant regularly.
 - You or a family member serves on the applicant's board
- If you have a COI of interest with an applicant, you will not be invited to read that applicant's application; however, you may still volunteer and evaluate other applicants.
- You will have 3 business days to review the list of applicants and submit your COI form. You must submit a form, even if no COIs are present.

Volunteer Assignments

- Each volunteer will be assigned 5 – 10 applications, dependent on how many volunteers and applications IEHP Foundation receives.
- Volunteer teams will be the group of volunteers who are assigned the same applications to review and evaluate.
- To maximize volunteer engagement, Sara Omari will reach out to each volunteer team to confirm a time during the week of August 6 for the team to meet (virtually) for an hour to discuss the evaluations.
- You will have approximately 2 business weeks to complete your volunteer assignment.

Applicant Status

- It is important to practice discretion when evaluating applications. Volunteers are not to discuss any applicant information with anyone outside their volunteer team. Treat the applications like HPI!
- Please do not post or share photos of applications online.
- Volunteers will be informed of the final applicants selected on the same day the applicants are notified (August 16).
- If an applicant reaches out to you directly, do not respond to any of their questions. Instead, direct the applicant to reach out to grants@iehpfoundation.org.

Volunteer Appreciation Luncheon

*Thank you,
Volunteers!*

- IEHP Foundation recognizes the time, energy and heart each volunteer has committed towards this opportunity.
- There is an optional Volunteer Appreciation Luncheon on September 11, 2024. More information will be provided closer to the date.

The background of the slide is a warm, orange-toned photograph of a person's hands typing on a laptop keyboard. The image is slightly blurred and has a soft, glowing effect, creating a professional and focused atmosphere.

Defining the Evaluations: Evaluation Criteria Measures

Evaluation Criteria

Volunteers will evaluate applications from local nonprofit organizations based on criteria guided by the following principles:

- ✓ Equity
- ✓ Collaboration
- ✓ Learning
- ✓ Trust

Consideration will also be given to ensure organizations selected are diverse in size, reach and regional representation by IEHP Foundation staff when making final selections.

Evaluation Form Setup

- Each evaluation criteria has 3 – 4 criteria measures within them.
- Volunteers will score each criteria measure using a five-point Likert scale
 - 1 = Weak
 - 2 = Somewhat Weak
 - 3 = Average
 - 4 = Somewhat Strong
 - 5 = Strong
- The form will also include a summary section:
 - **Application Total Score** (65 points max.)
 - **Overall Assessment:** Do you recommend this organization move to the second round application? (Yes/Maybe/No)
 - **Additional Reviewer Comments**
 - **What information would you like to see answered in Round 2 application?** Round 2 applications will focus on evaluating the leaders selected to participate in the program.

Evaluation Form Setup

- An Excel version of the online evaluation form will be provided to volunteers. This excel sheet will summarize the following slides.
- While all final evaluations must be submitted via GLM, volunteers may elect to use the one-pager to evaluate and copy their evaluations over into GLM.
- The applications can be viewed in the online platform; however, Foundation staff can also print out physical copies of the applications. Please reach out to Sara Omari at sara.omari@iehpfoundation.org to request.

Equity Criteria Measures



Principle: Equity

Definition: Prioritizing populations furthest away from health equity. For this opportunity, it is Inland Empire families with children (18 years and younger) from one or more of the following priority populations:

- Low-income households and/or those living in poverty
- Communities of Color
- Communities that are remote or rural
- Communities furthest from health equity, including cities with a Healthy Places Index (HPI) score lower than the 25th percentile.

Equity Criteria Measures (4)

Criteria Measure	LOI Application Reference Questions
<p>Place-Based: Organization demonstrates that they serve families with children that are experiencing the greatest health disparities and systemic barriers to health equity in the Inland Empire.</p>	<p>Organization Demographic & Program Details</p> <ul style="list-style-type: none"> • What IEHP Foundation priority population(s) does your organization serve? • What age group(s) does your organization primarily serve? • Briefly describe your organization's programs and services. • In what IEHP Foundation region(s) does your organization have a headquarters or satellite office? • What Riverside County communities does your organization serve? • What San Bernardino County communities does your organization serve? <p>Essay Questions</p> <ul style="list-style-type: none"> • Commitment to Health Equity
<p>Mission Alignment: Organization's mission, vision, values and programs demonstrate a commitment to advancing health equity and key social determinants of health in the Inland Empire.</p>	<p>Organization Demographic & Program Details</p> <ul style="list-style-type: none"> • Mission Statement & Organization Background • What Vital Conditions of Health and Well-Being does your organization address? • Briefly describe your organization's programs and services. <p>Essay Questions</p> <ul style="list-style-type: none"> • Commitment to Health Equity
<p>Diverse Workforce and Leadership: Organization's internal workforce is diverse and led by a staff and board that is representative of the local community served.</p>	<p>Organization Board</p> <ul style="list-style-type: none"> • Board Engagement and Impact <p>Executive Leader</p> <ul style="list-style-type: none"> • Executive Leader: Race/Ethnicity • Executive Leader: Gender <p>Emerging Leader</p> <ul style="list-style-type: none"> • Emerging Leader: Race/Ethnicity • Emerging Leader: Gender <p>Essay Questions</p> <ul style="list-style-type: none"> • Commitment to Health Equity
<p>Health Equity Capacity Building: Organization articulates how the Champions for Vibrant Health Leadership Network would contribute to increasing their capacity to address health equity in a meaningful and pragmatic way.</p>	<p>Essay Questions</p> <ul style="list-style-type: none"> • Commitment to Health Equity

Collaboration Criteria Measures

Principle: Collaboration

Definition: Leveraging stakeholder support at individual, organization, community and systems levels



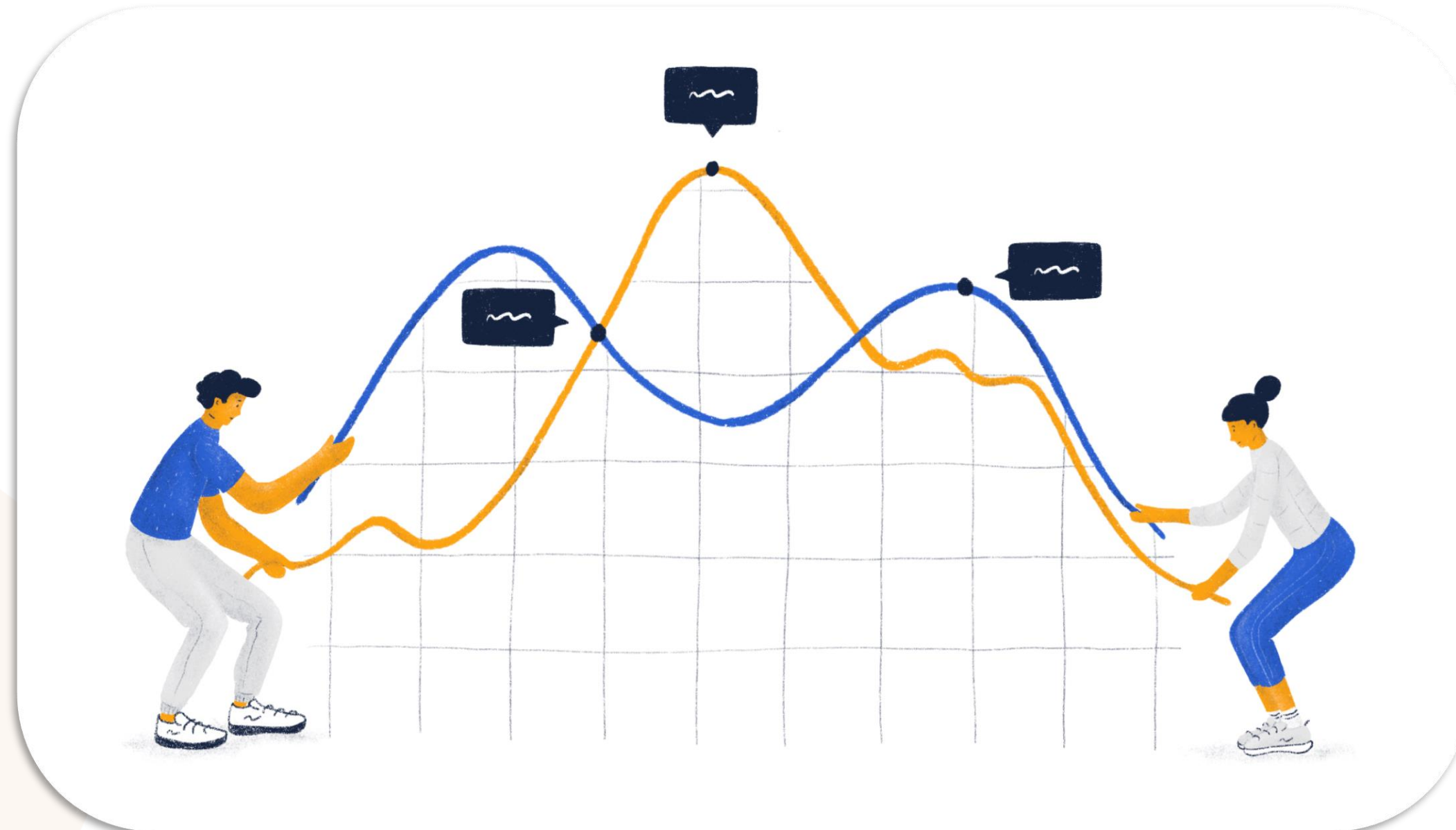
Collaboration Criteria Measures (4)

Criteria Measure	LOI Application Reference Questions
<p>Local Coalitions: Organization and its leaders actively participate with local collaborations and coalitions addressing the social determinants of health (SDOH) in the Inland Empire in a meaningful way.</p>	<p>Essay Questions</p> <ul style="list-style-type: none"> • Partnership and Advocacy
<p>Diversified Funding Streams: Organization secures funding for their work from a diverse set of public and private funders.</p>	<p>Organization Financial Details</p> <ul style="list-style-type: none"> • Organization's Top 5 Funders • Organization Financial Additional Information (optional) <p>Essay Questions</p> <ul style="list-style-type: none"> • Partnership and Advocacy
<p>Advocacy: Organization and its leaders recognize the importance of collective advocacy and demonstrate a vested interest in engaging in regional advocacy.</p>	<p>Essay Questions</p> <ul style="list-style-type: none"> • Partnership and Advocacy
<p>Advocacy Capacity Building: Organization articulates how the Champions for Vibrant Health Leadership Network would contribute to strengthening their organization's advocacy, policy and partnership efforts in a meaningful and pragmatic way.</p>	<p>Essay Questions</p> <ul style="list-style-type: none"> • Partnership and Advocacy

Learning Criteria Measures

Principle: Learning

Definition: Using data-driven approaches and iterative design practices to implement transformational change



Learning Criteria Measures (3)

Criteria Measure	LOI Application Reference Questions
<p>Data Sharing: The organization and its leaders demonstrate an ability and/or willingness to learn how to measure impact, collect data and share knowledge.</p>	<p>Essay Questions</p> <ul style="list-style-type: none"> • Learning & Improvement
<p>Organizational Growth: Organization articulate how the Champions for Vibrant Health Leadership Network would contribute to their organizational growth and/or capacity building in a meaningful and pragmatic way.</p>	<p>Essay Questions</p> <ul style="list-style-type: none"> • Learning & Improvement
<p>Iterative Design and Learning: Organization is positioned as a learning organization that evaluates and adapts strategy on a regular basis.</p>	<p>Essay Questions</p> <ul style="list-style-type: none"> • Learning & Improvement



Trust Criteria Measures

Principle: Trust

Definition: Demonstrated commitment and success as trusted messengers to Inland Empire families with children.

A graphic featuring the words 'trusted' and 'messengers'. 'trusted' is in a bold, blue, sans-serif font. 'messengers' is in a white, cursive script font, set against a textured, mustard-yellow brushstroke background. A large, light beige, curved shape is visible on the left side of the slide.

trusted
messengers

Trust Criteria Measures (2)

Criteria Measure	LOI Application Reference Questions
<p>Board Engagement: Organization demonstrates how its board positively engages with staff and actively contributes to achieving its mission.</p>	<p>Organization Board</p> <ul style="list-style-type: none"> Board Engagement and Impact
<p>Community Position: Organization demonstrates a willingness to strategically position themselves to be trusted messengers of health information to community members</p>	<p>Organization Demographic & Program Details</p> <ul style="list-style-type: none"> Briefly describe your organization's programs and services. <p>Essay Questions</p> <ul style="list-style-type: none"> Commitment to Health Equity



Summary Questions

When recommending the organization to move onto Round 2, consider the following:

- Does the organization demonstrate strong potential to deliver health information as trusted messengers to Inland Empire families with children?
For collaboratives, this could be done indirectly through their networks.
- Does the organization demonstrate strong potential to build their advocacy efforts and advance a positive regional narrative?
- Does the organization make a strong case for how this funding opportunity would help their organization build capacity and expand their services in reach?

Evaluation is an Imperfect Science

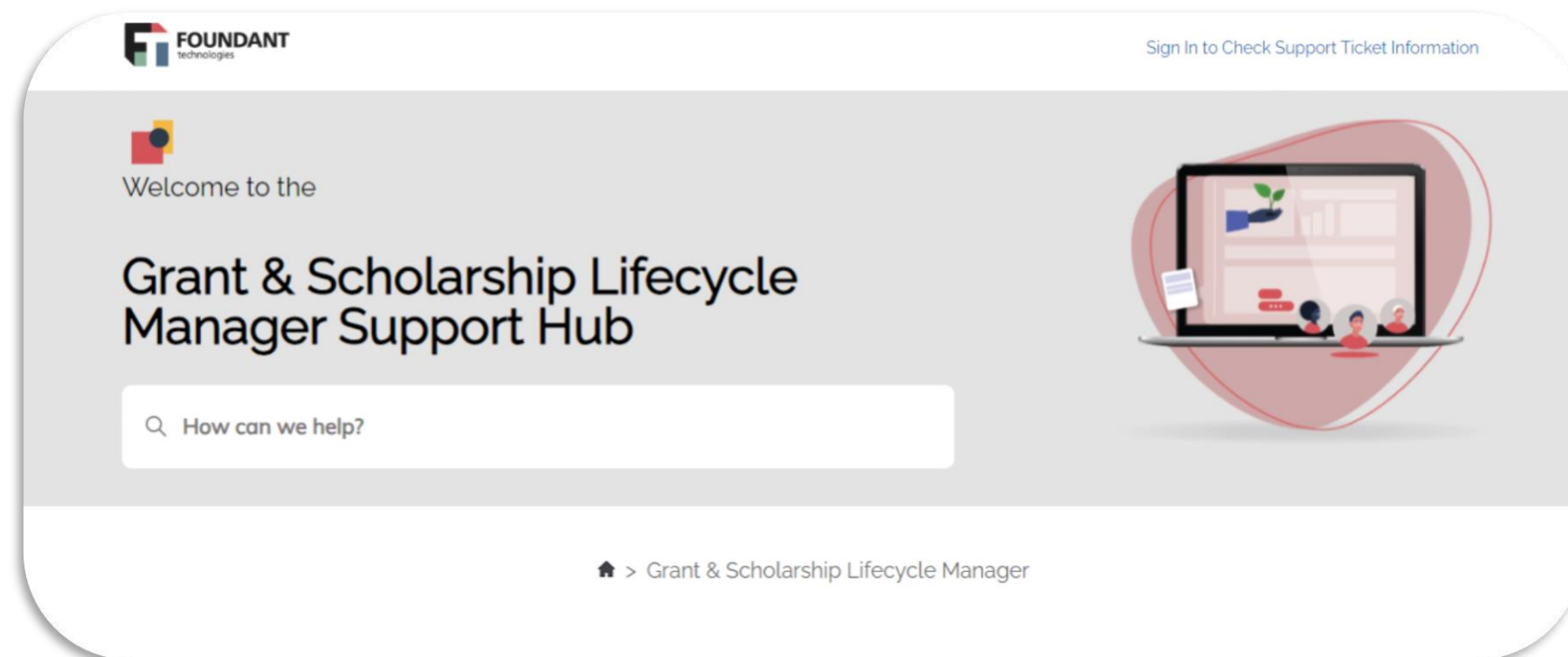
- Because consideration must be given based on regional representation and scope of services, score alone will not be the factor when selecting applicants to move to Round 2.
- IEHP Foundation Staff will use scores provided by volunteer evaluators to rank and sort through the applications.



Submitting Your Evaluations: Navigating Grants Portal

The background of the slide is a warm, orange-toned photograph of a person's hands typing on a laptop keyboard. The image is slightly blurred and has a soft, glowing effect, creating a professional and focused atmosphere.

Tutorials and Support



- Foundant Support Hub offers a library of tutorials, please reference as needed: [Grant & Scholarship Lifecycle Manager – Foundant Technologies](#)
- Recommended to use “evaluator” as a key word in searching for tutorials and support.
- Specific helpful tutorials are linked throughout the evaluation process.

Grants Management Portal


IEHP Foundation uses Foundation Grants Lifecycle Management (GLM) as the platform to management all grant and funding opportunities.

- To access, go to iehpfoundation.org and click on Grantee Portal in the upper righthand corner.



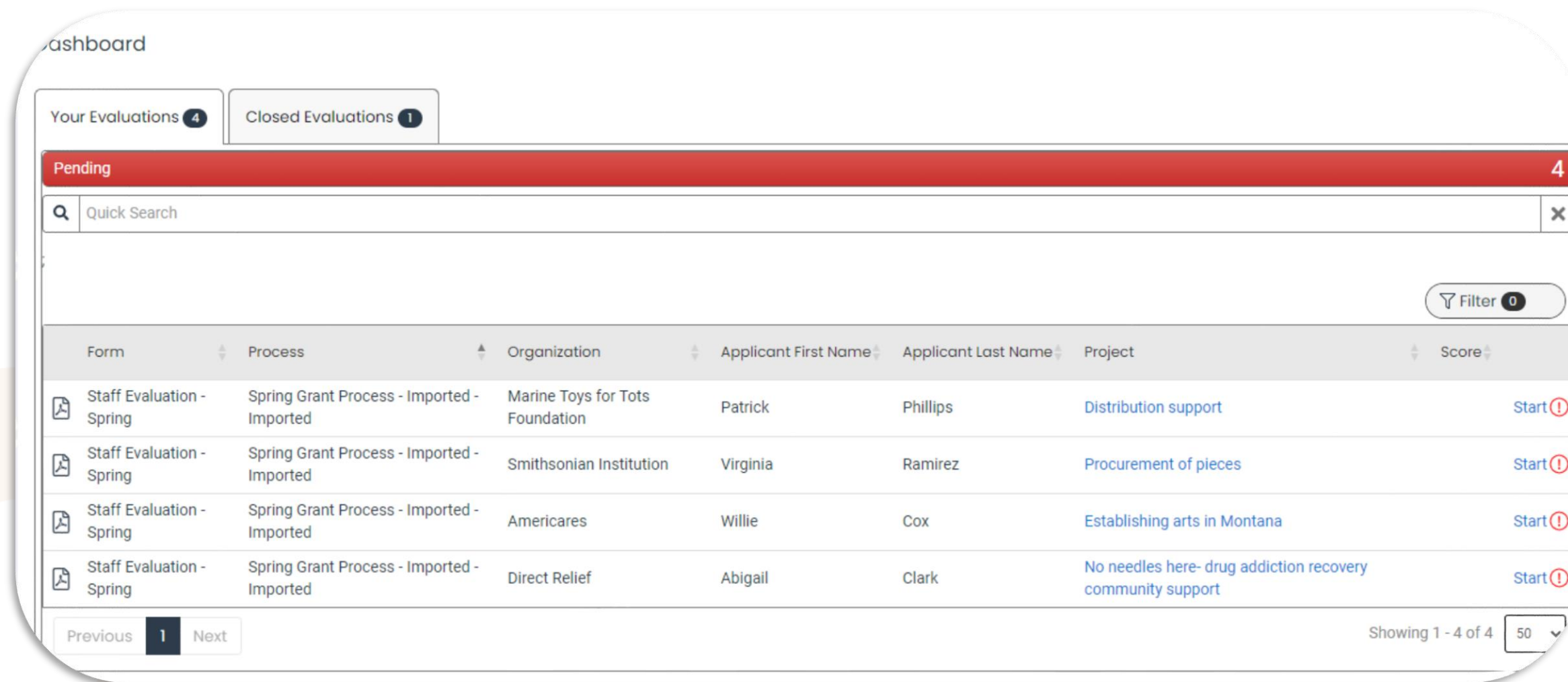
First Time Logging On

- IEHP Foundation staff must create each volunteer's individual profile.
- All volunteers will be able to access their profile beginning July 22.
- If it is your first time logging into GLM, use your IEHP email address and click "Forgot Password." This will allow you to create your own password.
- For questions about your account, reach out to grants@iehpfoundation.org.

A screenshot of the IEHP Foundation Grants Management Portal login page. The page features the IEHP Foundation logo at the top. Below the logo is a 'Logon' section with two input fields: 'Email Address*' containing 'test@iehp.org' and 'Password*' with masked characters. There are two buttons: 'Log On' and 'Create New Account'. A link for 'Forgot your Password?' is located below the buttons. To the right of the login form is a welcome message and instructions for new and existing users, along with contact information for additional questions. Two large orange arrows are overlaid on the image: one points from the 'Forgot your Password?' link to the 'Email Address' field, and the other points from the 'Forgot your Password?' link to the 'Log On' button.

Accessing Your Evaluations

- After logging in, you will see the evaluations assigned to you from your homepage. Click “Start” to begin the evaluation.
- Please review [Evaluation Tutorial – Foundant Technologies](#) for additional screenshots.



Dashboard

Your Evaluations **4** Closed Evaluations **1**

Pending **4**

Quick Search

Filter **0**

Form	Process	Organization	Applicant First Name	Applicant Last Name	Project	Score
Staff Evaluation - Spring	Spring Grant Process - Imported - Imported	Marine Toys for Tots Foundation	Patrick	Phillips	Distribution support	Start
Staff Evaluation - Spring	Spring Grant Process - Imported - Imported	Smithsonian Institution	Virginia	Ramirez	Procurement of pieces	Start
Staff Evaluation - Spring	Spring Grant Process - Imported - Imported	Americares	Willie	Cox	Establishing arts in Montana	Start
Staff Evaluation - Spring	Spring Grant Process - Imported - Imported	Direct Relief	Abigail	Clark	No needles here- drug addiction recovery community support	Start

Previous **1** Next

Showing 1 - 4 of 4 50

Important Notes

- **Read Wholly**: It is recommended to first read through the entire application and then reference back to the specific reference questions identified for each evaluation criteria measure.
- **Allow Sufficient Time**: It is anticipated that each application may take up to an hour to read and evaluate. As this can be dense material, it is recommended to space out your evaluations over several days.
- **Reach Out**: If any instruction is unclear or you have additional questions, please reach out to Sara Omari. If you would like to schedule time to walk through your first evaluation together, that can be arranged!
- **Practice Discretion**: Applicant information is sensitive and should not be shared nor should you communicate with the applicant regarding their application.

Important Notes - continued

- **Lift Learning**: IEHP Foundation values learning, especially as this is our first competitive application cycle. Please feel free to share your honest feedback about the evaluation process.
- **Proactively Communicate**: If for some reason you will be unable to complete your volunteer assignment, communicate with Sara Omari as soon as possible so that your assignment can be reassigned. It is important that each application is reviewed by the same number of volunteers.



Questions & Answers



**Thank
You!**

