

# GRANTMAKERS of Oregon and Southwest Washington

AN ASSOCIATION OF GRANTMAKERS INSPIRING EFFECTIVE PHILANTHROPY

## PRESIDENT'S MESSAGE: *The Winds of Change*

While folks in Oregon were enjoying the early, unseasonable spring weather this March, Grantmakers Executive Director Joyce White and I traveled to a very frigid Washington D.C. to attend several events, including Foundations on the Hill, organized by the Forum of Regional Associations of Grantmakers (Grantmakers's national association) and the Council on Foundations. Foundations on the Hill coordinates visits by grantmakers to Members of Congress in order to raise awareness of the importance of philanthropy.

It was both fun and inspiring to be at the Capitol, visiting our Senators' offices. In spite of security lines that stretched outside in the freezing weather, we were two of hundreds of citizens exercising the privilege of accessing our elected officials, telling our stories and making our voices heard.

As you no doubt know, this is a particularly important year for the philanthropic and non-profit sectors to communicate with our legislators. The Senate Finance Committee and the Joint Committee on Taxation are considering significant changes to regulation of the charitable sector that could have immediate effects on the way Grantmakers members do business. Proposals being discussed include changes in the excise tax paid by private foundations, limitations of charitable gifts of property to non-profit organizations, elimination of charitable deductions for donation of environmental conservation easements, to name just a few. The following reflections are based on our experience at Foundations on the Hill and at subsequent meetings in Washington.

### ***The window of opportunity to focus attention on an issue is a narrow one.***

Too often citizens or organizations contact their

Members of Congress only when they have concerns, rather than building understanding in advance. Our message was that Grantmakers of Oregon and Southwest Washington and its members can be a resource to help our representatives better understand the difference the charitable sector is making in Oregon and the possible impact as legislation is crafted. We offered to connect the Senators with representatives of the funding and non-profit communities when they are "at home".

### ***The need to identify new revenue sources.***

The need to identify new revenue sources is of equal or greater importance than eliminating sector abuses and is the driving force in the current Senate Finance Committee's discussion of charitable sector reform. President Bush recently backed away from his long standing support for giving tax deductions to non-itemizers who make charitable contributions. In another example, the proposed rule change that would limit deductions on donations of property is estimated to "raise" \$2.5 billion in new revenue. Most interesting was learning that some of these provisions could be attached as offsetting revenue sources on unrelated taxation bills and could pass with virtually no debate.

### ***The philanthropic sector needs to tell our stories to legislators.***

Our visits with senatorial staff members underscored a lack of understanding about the philanthropic sector and the effects of actions being proposed. While data about grants and donations is



Kathleen Cornett

of interest, staff members were most eager to hear tangible examples illustrating the importance of our work.

### ***What should Grantmakers of Oregon and Southwest Washington and its members do?***

1. Be informed. The winds of change are blowing, and we should not be taken unaware. Two good sources of information are [www.nonprofitpanel.org](http://www.nonprofitpanel.org) and [www.foundationsonthehill.org](http://www.foundationsonthehill.org). Joyce White is also tracking the progress of the discussions and is available to fill you in.
2. Strengthen ourselves. Over the next few months Grantmakers will consider ways our association can strengthen our role in helping our members voluntarily adhere to strong principles of ethical and accountable stewardship.
3. Communicate with Congress. Oregon is the only state with two Senators on the Finance Committee. While Grantmakers will continue to keep them informed, messages from individual members are also important. We need to let them know that the vast majority of organizations in the charitable sector are operating legally, ethically and effectively.

This is an exciting time in the evolution of the unique American ideal of philanthropy: private actions for the public good. If we stay active and informed, those of us in the field will not be surprised and blown over, but will catch the winds of change and sail even higher.

—Kathleen Cornett

## School-to-Career Scholarships Help Students Succeed

Something amazing can happen when a kid believes that he or she has a future. At least that's the premise of a new scholarship program that supports high school kids motivated to learn about automobile repair, not anthropology; or electronics, not English lit.

In his article for USA Today, "A smart path—that isn't college," writer Ben Brown cites U.S. Bureau of Labor Statistics estimates that six of the top ten fastest-growing occupations between 2002 and 2012 don't require bachelor's degrees. The bottom line: in today's economy, students who complete technical education programs can do well for themselves.

The promise of career-focused education forms the backbone of the Venture Scholars program, created by a small group of local philanthropists to recognize and support talented students whose plans don't include the pursuit of a 4-year college degree. Venture Scholars is modeled on a scholarship program started in 1998 by the family foundation of Intel Chairman Andy Grove. The Grove Scholars program targets students with a focused career goal and a plan to enter a training institute or a vocational education program at a community college. Grove Scholars is now active in twelve California high schools, awarding approximately 150 scholarships a year. The program collects data on its award

recipients and has plenty of anecdotal accounts of success: hundreds of Grove Scholars are now trained and working in such jobs as auto technician, chef, dental assistant, and preschool teacher.

The Venture Scholars program is administered by Social Venture Partners Portland (SVPP), a group of Portland area philanthropists that pool their funds and talents to support local nonprofit organizations. The scholarships provide qualified students up to \$4,000 to spend on tuition, books, and related educational expenses. Participating high schools also receive a grant of \$500 for each Venture Scholar for program administration and for

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# Grantmaker FOCUS

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## BOARD OF DIRECTORS

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## NEWSLETTER COMMITTEE

Michelle McClellan  
Joyce White  
Robyn Shuey

*We encourage members to contribute information as short news items about new program initiatives, recent publications by their organization, personnel changes, and other items you wish to communicate to fellow members.*

*Please submit items to [jwhite@gosw.org](mailto:jwhite@gosw.org) or by mail to Grantmakers of Oregon and Southwest Washington, P.O. Box 6381, Portland, OR 97228-6381.*

## Raymond Jubitz, Executive Director Jubitz Family Foundation

This month we feature new board member Ray Jubitz. Ray began his career in philanthropy when he joined the International Executive Service Corps in 1990; he just didn't know it at the time. For nine years he volunteered as the country director in Malawi and Zimbabwe and then served another two years as CEO of IESC in Sri Lanka. Those experiences of offering his time and talent (and some treasure, too) expanded his view of the world and showed him that no matter how different we appear to be, we are all one on this planet.

Now that he has been the Executive Director of the Jubitz Family Foundation for three years, Ray knows that the experience with IESC was invaluable because of the lessons learned: we get better results when we work together; there is no substitute for personal contact; keep listening; and, tomorrow will be a new day, bringing another opportunity for

peace and gratitude. These lessons fit very well with the focus of the Jubitz Family Foundation, which funds projects related to early childhood development and education, the environment and peacemaking. In addition, the foundation directors know that working with other foundations will bring about better results for grantseekers, and have asked Ray to actively pursue collaborative efforts.

Ray is a graduate of the California Maritime Academy and received his MBA in Finance from the University of Michigan's Graduate School of Business. He spent his "working" career in the maritime industry. When he has free time, he is joined by his wife Nansie, who works with the SMART program, in the pursuit of birds, birdies, bicycling and walking. Ray is thoroughly enjoying his time back in Oregon and hopes to travel as much as possible to its four corners.

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## 990 PF Training Opportunities

You are invited to join a timely training session with 990-PF tips for foundation leaders who sign these documents. Your tax preparers are also invited to participate.

In this era of increased scrutiny and accessibility, foundation tax returns take on new meaning and importance. The 990-PF is no longer just a report to the IRS. Reporters, researchers, grantseekers - and many others - look to these forms for information about your organization. According to the Urban Institute, it is the most commonly used data source about nonprofits. This makes accurate numbers, correct entries, and properly worded descriptions more important than ever.

Led by Lori McLaughlin, CPA, KPMG and advisor to the Conference of Southwest Foundations, and David Nims, of Clark Hill, Detroit, MI, and counsel to the Council of Michigan Foundations; this 90-minute program will provide expert advice on completing your 990-PF, focusing especially on

common errors and potentially misleading entries. They will also address participant questions on that subject.

The program will be offered twice. Please choose from the dates below and register for the call-in number and other materials by going to: [www.regonline.com/22850](http://www.regonline.com/22850). The registration fee is only \$20 per site.

Tuesday, April 19 2-3:30 pm

Thursday, April 28 2-3:30 pm

Making the Most of Your 990-PF is hosted by Grantmakers of Oregon and Southwest Washington and its nationwide network, the Forum of Regional Associations of Grantmakers. Together we help more than 4,000 foundations and other philanthropists expand, enhance, and explain giving in our regions.

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### *Scholarships continued*

school-to-career activities. Four donors have committed to fund a total of eleven scholarships per year for four years (a total commitment of \$198,000). At the end of four years, 44 students will have received funding. And the program's champions are working hard to attract more donors. Their goal is to fund sixteen to twenty scholarships each year.

"By providing more opportunities for these students, we hope to change the culture in schools that de-values technical and career-focused education," says SVPP member Joe Barthmaier. "It's important to create buzz and excitement around school-to-career programs that specifically target talented kids who aren't on a traditional college track."

The Venture Scholars program is currently active at Roosevelt and Benson Polytechnic High Schools. Candidates for the scholarship awards could be like "Ray", who has always wanted to be a firefighter or an emergency medical technician (EMT).

Once at risk of failing classes, he is doing well in Roosevelt's alternative program, and plans to enroll in the EMT and paramedic classes at community college. Or like "Estelle," who lives with her grandmother, is studying Health Occupations at Benson and wants to become a medical laboratory technologist.

"So many of our students are unaware of all of the different training opportunities that are available in our community, and these scholarships will help shed some light and give kids more choices," says Kathy Fong Stevens, coordinator of Roosevelt's College and Career Center.

Scholarship applications are currently being reviewed, and winners will be announced in early May.

For more information about the Venture Scholars Program, contact Joe Barthmaier at (503) 286-1261 / [barthmaier@comcast.net](mailto:barthmaier@comcast.net), or Deborah Lockwood at (503) 647-2270 / [deborahlockwood@comcast.net](mailto:deborahlockwood@comcast.net). Visit Social Venture Partners Portland at [www.svpportland.org](http://www.svpportland.org).

## What's Happening

Grantmakers welcomes new member, the **Gilhausen Family Foundation** and its administrator, **Patti Gilhausen Guptill**. The Foundation supports spiritual life, education, community-based projects and cultural programs in and around Bozeman, Montana, The Foundation also makes grants in Oregon and Patti is an Oregon resident.

Grantmakers welcomes new member **Comcast Cable Communications** and its Community Affairs Liaison, **Shannon Grosswiler**. Comcast funds primarily in education. Shannon has joined the Grantmakers' Program Committee and is an active participant in the Corporate Funders Learning Exchange.

The Sisters Area Chamber of Commerce selected **Kathy Deggendorfer**, Founder and President of the **Roundhouse Foundation**, as its 2004 Citizen of the Year. Kathy has dedicated herself to bringing people in the community of Sisters together through the arts. An artist herself, she serves on board of CALDERA, Central OR Community College and co-chairs the Sisters Folk Festival.

**Casey Woodard**, Executive Director of the **Woodard Family Foundation**, has been invited to serve on the Council on Foundation's Committee

on Family Philanthropy. The Committee recently released "Stewardship Principles for Family Philanthropy."

**Dianna Smiley**, formerly with The Oregon Community Foundation, has accepted a position with the **National Center for Family Philanthropy**, Washington D.C. beginning April 6, 2005. Dianna will be the Center's Program Director for Education and Outreach.

**Philanthropy Northwest**, our colleague regional association in Seattle, welcomes new executive director, **Carol Lewis**. Carol brings a rich mix of experience from the business community, the nonprofit sector and city government. Carol most recently served as Corporate Secretary and Chief Administrative Officer for Coinstar, Inc. Lewis also served as Executive Director of Pacific Northwest Ballet and a the City of Seattle's Deputy Mayor under former Mayor Charles Royer. Lewis is a founding member for both Threshold Housing and Washington Women's Foundation. She currently serves as President of the Board for the Seattle Parks Foundation and as a trustee for Seattle Biomedical Research Institute.

## New Online Resource for Environmental Funders

Grantmakers of Oregon and Southwest Washington and The Oregon Community Foundation invite members of the grantmaking community to participate in the Oregon Environmental Funders Listserv. This listserv is a vehicle for funders interested in supporting the work of the environmental community to share information and gain insight into funding decisions.

Members are invited and encouraged to post information and/or questions regarding environmental issues facing our community. The purpose of the listserv is to share information, while maintaining a comfortable, respectful atmosphere in which professional relationships are maintained. The activities of the Oregon Environmental Funders Listserv will not be used for soliciting grants, attempting to influence the grant-making decisions of members, advancing a political agenda, or soliciting professional services. As the listserv is a resource for the grantmaking community, its membership is restricted as such.

The listserv will be launched as soon as we have a group of subscribers. If you are interested in participating in the Oregon Environmental Funders Listserv, contact Joyce White at [jwhite@gosw.org](mailto:jwhite@gosw.org).

## Looking for a Colleague?

Grantmakers of Oregon and Southwest Washington's membership directory is now up on Grantmakers website in the "Members" section. You are now able to access directory information via the web and staff is able to keep contact information up-to-date. The web version maintains our policy of publishing only the information you tell us you want included and we continue to state that the directory is for member use only.

If you have changes you would like made to your entry, please send those corrections to [Pamela@gosw.org](mailto:Pamela@gosw.org).

## Summer Internships

A number of our members have contacted the Grantmakers office asking about internship opportunities with foundations or corporate grantmaking programs. A summer internship can offer college-age students an incentive to research issues important to your organization, to develop a new skill or become better informed about how a grantmaking organization works. Interns can bring energy, a new perspective and willing hands to your work environment. If you are interested in having an intern, please contact Joyce at [jwhite@gosw.org](mailto:jwhite@gosw.org) or (502) 226-6340 for the names and contact information of those individuals looking for a placement.

## Grantmakers CALENDAR

*Southern Oregon Affinity Group*  
Thursday, April 7, 2005  
9:00 am–1:30 pm  
Grants Pass, OR

*Corporate Funders Learning Exchange*  
Thursday, April 7, 2005  
7:30 am–9:00 am  
Multnomah Athletic Club  
1849 SW Salmon  
Portland, OR

*Southern Willamette Valley Affinity Group*  
Thursday, April 14, 2005  
11:45 am–1:30 pm  
Eugene Downtown Athletic Club  
999 Willamette Street  
Eugene, OR

*Alliance for Justice—Foundation Advocacy*  
Friday, April 15, 2005  
8:30 am Registration, 9:00–3:00 Workshop  
Multnomah Athletic Club  
1849 SW Salmon  
Portland, OR

*April Monthly Program—Funding for Global Disaster Relief*  
Thursday, April 21, 2005  
11:45 am–1:30 pm  
Mercy Corps  
3030 SW First  
Portland, OR

*Family Foundation Learning Exchange*  
Tuesday, May 10, 2005  
6:00 pm–7:30 pm  
Topic and Location to be announced.

*Grantmakers of Oregon and Southwest Washington extends a thank you to member organizations for their generous operating support or program sponsorship:*

J.W. & H.M. Goodman Family Charitable Foundation

The Samuel S. Johnson Foundation

Lora L. and Martin N. Kelley Family Foundation Trust

The Kinsman Foundation

Mancini Foundation

Meyer Memorial Trust

Nike, Inc.

PacificCorp Foundation for Learning

PGE Foundation

Social Venture Partners Portland

## Council on Foundations Summer Institutes 2005

**The Governor Hotel, Portland, OR**

**July 10—Institute for New Board Members**

**July 11—Special Seminar: Establishing a New Foundation**

**July 11–12—Institute for New Grantmakers**

Grantmakers of Oregon and Southwest Washington is pleased to co-sponsor the Council on Foundations Summer Institutes 2005 in Portland. You can find registration and program information on the Council's web site, [www.cof.org](http://www.cof.org) or a link from the Grantmakers' web site, [www.gosw.org](http://www.gosw.org).

### ***New perspectives, new strategies, new connections***

Foundation work can be tremendously rewarding. It also challenges you in ways you may never have anticipated

To help you give your best—and get the most satisfaction—in your foundation role, the Council on Foundations offers three highly focused learning events for new foundation leaders, board members and staff. Together with our strategic partners and respected organizations in the field, the institutes and special seminar help foundation professionals maximize their effectiveness.

### ***Institute for New Board Members— July 10, 2005***

New foundation board members are invited to

attend this one-day professional development event. The institute provides trustees with the information they need to feel comfortable in their new role and, more importantly, to begin making an impact. This event is specially designed for new trustees, but all trustees who want to learn more about their board responsibilities are invited to attend.

### ***Establishing a New Foundation— July 11, 2005***

This half-day, small-group seminar is designed for those who are in the planning stage or have just begun taking on the challenge of establishing a new foundation. Spend the morning with Colburn Wilbur, trustee and past president of The David and Lucile Packard Foundation, and Andrew Schulz, deputy general counsel of the Council on Foundations, in a confidential, interactive, small-group discussion on starting a foundation.

### ***Institute for New Grantmakers— July 11–12, 2005***

Program officers, executives and other foundation staff are invited to participate in the Institute for New Grantmakers. Led by philanthropic experts, the institute provides two days of engaging discussion and presentations for grantmakers who are new to philanthropy or want to increase their understanding of foundation work.

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## Resource Center

Make this year the year you decide to explore the wealth of resources that can be found in the Grantmakers' library.

In upcoming issues of the newsletter we will feature new additions to the library shelf and let you know about resources that can be found online. Resources include information on grantmaking, foundation management, philanthropy and issue areas. We

receive research reports from the Foundation Center and publications from the Council on Foundations, the Association for Small Foundations and the National Center for Family Philanthropy.

The library is located at Meyer Memorial Trust and is available to you during regular office hours, 8:30 am–5:00 pm. Members of Grantmakers are welcome to borrow resources from the library. For additional information on library resources, please call Joyce at (503) 226-6340.

## NOTICE BOARD

*Additions/changes to contact information:*

### *Donad E. Tykeson Foundation*

Please change name to Tykeson Family Charitable Trust

### *Jeld-Wen Foundation*

Please change address to  
317 SW Alder, Suite 100  
Portland, OR 97204  
Web address: [jeld-wenfoundation.org](http://jeld-wenfoundation.org)

### *Marie Lamfrom Charitable Foundation*

Penny Pierce—[penny@marielamfromcf.com](mailto:penny@marielamfromcf.com)  
Patty Brandt—[patty@marielamfromcf.com](mailto:patty@marielamfromcf.com)

### *Gilhousen Family Foundation*

13205 SW Whistling Way  
Beaverton, OR 97008  
Phone: (503) 643-4183  
Email: [foundation.admin@gilhousen.net](mailto:foundation.admin@gilhousen.net)

### *Comcast Cable Communications*

9605 SW Nimbus Avenue #12  
Beaverton, OR 97009  
Phone: (503) 605-6390  
Fax: (503) 605-6226  
Email: [Shannon\\_Grosswiler@cable.comcast.com](mailto:Shannon_Grosswiler@cable.comcast.com)  
Email: [Theressa\\_davis@cable.comcast.com](mailto:Theressa_davis@cable.comcast.com)

### *The Anne & Eli Shapira Charitable Foundation*

Cathy Thompson, Program Director  
Phone: 503-349-3520  
Fax: 1-877-586-9416  
Email: [cathyt@shapirafoundation.org](mailto:cathyt@shapirafoundation.org)

Robert Thompson, Grant Administrator  
Phone: (503) 358-0133  
Fax: 1 (877) 586-9416  
Email: [robtt@shapirafoundation.org](mailto:robtt@shapirafoundation.org)