

# GRANTMAKERS of Oregon and Southwest Washington

AN ASSOCIATION OF GRANTMAKERS INSPIRING EFFECTIVE PHILANTHROPY

## PRESIDENT'S MESSAGE: *Funders and Nonprofits: It's a Partnership*

How would we do our work in philanthropy if there were no nonprofit organizations? Think about it. We would all be running programs ourselves—serving clients, creating projects and meeting payroll. We would not have the opportunity to see our communities from a broad perspective or the luxury of supporting multiple strategies for community improvement. We need our nonprofit partners!

The unprecedented level of scrutiny being given by Congress to the philanthropic and nonprofit sectors gives us the chance to reexamine the work we do and the ways we do it. Questions have been raised about the way foundations operate: who benefits and whether the sector's results justify the favorable tax status it is afforded. Many of us are communicating to Congress a resounding "yes" about the value of philanthropy and about the overwhelming good that is accomplished by the great majority of foundations.

At the same time though, all charitable giving programs should be encouraged to examine our practices to make sure we are providing the best possible service to communities—and to our nonprofit partners.

At a recent meeting of the board of directors of Grantmakers we discussed the obligations of our organization and its members to the nonprofit sector. Listed below are a few of the partnership standards I believe our members should strive to attain.

- Provide clear statements about our grantmaking interests and processes, including deadlines, steps in the review process, and criteria used to make grants.
- Whenever possible give honest feedback about declines, particularly when the project has a "fatal flaw". For some very small foundations this is not possible, but at minimum every applicant deserves notice that its proposal was declined.
- Make sure our grants strengthen nonprofits and the sector by requesting reasonable outcomes in relation to the size of the grant, making sure our grants don't pull organizations away from their missions, and that we and our grantees have mutually understood expectations about the



Kathleen Cornett

amount and duration of support and the accomplishments to be achieved.

- Keep learning about best practices. The nonprofit world and its work are constantly evolving. We have an obligation to keep our knowledge fresh. Grantmakers programs are a great resource for us all.

- Guard against arrogance. Even though there is an inherent tension between those who have the money and those who want it, we can

minimize its effects by keeping in mind our role as partners who need and support one other. Grantseekers are potential business partners, not beggars.

Grantmakers will be pursuing the idea of a set of standardized guiding principles for our members in the months ahead. We will also discuss our opportunity to share knowledge and resources with our nonprofit partners in Oregon and Southwest Washington. Stay tuned!

—Kathleen Cornett

## What Grantees Want

In 2003, the Center for Effective Philanthropy ([www.effectivephilanthropy.org](http://www.effectivephilanthropy.org)) conducted a ground-breaking survey of more than 6,000 nonprofit grantees of 30 large foundations to determine what factors most strongly influence grant recipients' sense of satisfaction with their funders. More than 3,200 nonprofits responded. The Center then analyzed the results to find the key drivers of grantees' overall satisfaction with particular foundations. Grant recipients' perceptions of the foundations' impact on their organizations, on their community, and on their field were also evaluated.

As expected, most grantees' impressions of foundations are generally positive, but their levels of satisfaction vary. Three factors seem to affect grantees' satisfaction levels most:

**1) The quality of their interactions with foundation staff.** Increased frequency of interactions does not equate to increased quality in the minds of grant recipients. Foundations are judged on their staff's fairness, responsiveness, and approachability. The "quality of interactions" also hinges on consistent staff interactions (since, some complain, the same program might be reviewed differently by different program officers), funders' attention to grantees' success and funders' consistent treatment of grantees. Interestingly, grant recipients' percep-

tions about a foundation being responsive and approachable stay about the same whether they speak to their funders weekly or quarterly.

**2) Clear communication of the foundation's goals and strategy.** Foundations must clearly and consistently articulate their objectives. Grant recipients do not want foundations to look to nonprofits' goals and objectives for direction; they want foundations to state their goals so that each nonprofit can evaluate how they best fit into those objectives. "Clear communication" includes both personal and official written communications. A foundation's focus should be clearly defined and widely communicated. Foundations with a geographic focus rate most highly in this area. Notably, grantees rate a foundation more highly when they are able to speak with a program officer before submitting a grant applications.

**3) The foundation's expertise and external orientation.** Foundations, grantees say, need to have a vision of the change they seek within the nonprofit's field or community. In other words, a foundation should understand the fields and communities they fund and be able to advance that knowledge and to affect public policy. According to respondents, the best foundations have impact beyond simply distributing money. While it helps if funders introduce grant recipients to other leaders

in the field or provide advice about their field, these actions are not key drivers of grantees' satisfaction. Grantees like it when funders collect and distribute information about their field of focus, which facilitates fundraising efforts and creates a united front for tackling problems.

These factors outweigh others conventionally believed to have a strong impact on grantees' relationships with their funders, such as receiving program support instead of operating or capital support. The size and duration of a grant received and the type of support offered are not significant drivers of satisfaction. Nor are variations in foundation processes and requirements: turnaround time for grant requests and the amount of time spent on fulfilling administrative requirements do not drive grantees' satisfaction.

The Center for Effective Philanthropy also found that foundations can have a wide range of grantmaking patterns in terms of size, type, and length of support, as well as degree of administrative requirements, and still maintain a positive relationship with grant recipients. But each foundation must rate highly in the three main satisfaction drivers listed above to received the highest ratings overall.

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# Grantmaker FOCUS

## BOARD OF DIRECTORS

Kathleen Cornett  
The Oregon Community Foundation  
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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.*

## Comcast of Oregon and Southwest Washington

Comcast Cable Communications may be based in Philadelphia, but the community spirit of founder Ralph Roberts is a force that's felt way out here in Southwest Washington and Oregon. In the words of Community Affairs Liaison Shannon Grosswiler, "Ralph is so dedicated, when he speaks the whole room tears up."

Comcast, the nation's largest cable provider, is in the highly competitive business of high speed Internet, cable, and phone service. Motivated by more than buyouts and profit margins, the company has been dedicated to communities since its inception forty years ago. Every year, well over a thousand employees in this region alone mobilize for Comcast Cares Day, offering time and energy to schools, relief nurseries, and other charities that need a large volume of volunteers for large-scale painting, cleaning, and landscaping projects. This year, the service day will take place on October 1, 2005.

In addition to sweat equity, Comcast of Oregon and Southwest Washington contributes money and media support to some 40 local organizations focused on education and economic development. For example, Comcast has worked with Salem Hospital and Salem Library to develop materials for young



*A Comcast employee participating in community volunteerism*

parents about the importance of reading to their children. In a nutshell, Comcast's community mission is to improve education, primarily through support of literacy programs. But the company takes a broad view of literacy, and also supports leadership development for teens, arts education, and events such as MusicFest NW, an extension of the company's "commitment to saving art and music in the hearts and minds of children and families."

"With 1,600 employees, it's tough to be democratic about how we invest in our community," says Shannon Grosswiler. "This is a small community, and we like to play—to be a voice at the table. Our competition doesn't invest since they have no employee base here. In terms of per-customer spending for community projects, we're one of the highest in the nation for Comcast. Our leadership sees the value in contributing to our community."

For more information, please contact Shannon Grosswiler, Community Affairs Liaison, Comcast of Oregon and SW Washington, (503) 605-6398, [Shannon\\_Grosswiler@cable.comcast.com](mailto:Shannon_Grosswiler@cable.comcast.com).

## New Board Member

**Kandis Brewer Nunn, Vice President**  
**Jordan Schnitzer Family Foundation**  
**Portland, Oregon**

Grantmakers of Oregon and Southwest Washington Board member Kandis Brewer Nunn had no formal training in philanthropy when she entered the field, but years of civic involvement had prepared her well. So did her career in communications and public relations. In the late 1980s, Kandis was the Director of Marketing & Communications for PacifiCorp Development, Inc., where she shared responsibility with counterparts at the other PacifiCorp subsidiaries to help the board establish the policies and procedures that would govern the company's first foundation. Following her career with PacifiCorp, Kandis established a consulting practice focused on strategic communications and issues management work. Working on a project for The Oregon Community Foundation, she researched the history of philanthropy in Oregon and nationwide to gain a better understanding and

appreciation for the field. Her current position is complex: she administers the Jordan Schnitzer Family Foundation, assisting on special projects funded out of the Harold and Arlene Schnitzer CARE Foundation, as well as for Harsch Investment Properties.

Like many of her Board colleagues, Kandis believes that Grantmakers' members can find ways to effectively leverage each other's work through sharing of information and teaming up on evaluations and application reviews to more efficiently provide information and advice to each funder's decision makers.

Kandis encourages funders to engage in dialogue with the public sector about what responsibilities each should shoulder and how to do so effectively. "We need to figure out how to provide for the basic needs of citizens—food, shelter, health, and education. We need to get ahead of the curve before we have to spend the bulk of our limited funding resources on remedial activities," she states. "A major challenge facing Oregon is how we find a fair and balanced approach to paying for essential services on a collective basis. And what of these should individuals and families be expected to assume?"

## Philanthropy Northwest 2004 Annual Conference & Membership Meeting

Sunday, September 11–Tuesday, September 13, 2005  
Dolce Skamania Lodge  
Stevenson, Washington

### Register early for Reduced Rates

Philanthropy Northwest, our colleague regional association of grantmakers, is extending their member conference registration fees to members of Grantmakers of Oregon and Southwest Washington. Conference registration is now open at [www.PhilanthropyNW.org](http://www.PhilanthropyNW.org). Register before July 1 and save over \$100!

### Reserve a Room with a View

Make your room reservations at Dolce Skamania Lodge by calling 1 (800) 221-7117 and asking for the Philanthropy Northwest room block. Several room options are available including many with views of the Columbia River.

### Questions about the Conference?

Please contact Philanthropy Northwest at (206) 443-8430 or visit [www.PhilanthropyNW.org](http://www.PhilanthropyNW.org).

## National CALENDAR

### *International Human Rights Funders Group—Human Rights and Security*

August 11–12, 2005

New York, NY

Contact: Catherine Townsend,

ctownsend@mertzgilmore.org, www.hr-funders.org, (212) 475-8363

### *Neighborhood Funders Group—2005 Annual Conference and 25th Anniversary Celebration*

September 11–13, 2005

Phoenix, AZ

Contact: www.nfg.org

### *Council on Foundations—Fall Conference for Community Foundations*

September 19–21, 2005

Seattle, WA

Contact: Heather Scott, (202) 466-6512

### *Environmental Grantmakers Association—Fall Retreat*

September 25–28, 2005

Mohonk Mountain House

New Paltz, NY

Contact: ega@ega.org, www.ega.org

### *Grantmakers For Children, Youth & Families, 20th Annual Conference—Crossing the Divide: Creating Communities for All Ages*

September 26–28, 2005

Brown Palace Hotel

Denver, CO

Contact: www.gcyf.org,

(301) 589-GCYF (4293)

### *Grantmakers in the Arts—Culture Jam: Friction, Fusion Synergy*

October 16–18, 2005

The West Pasadena

Los Angeles, CA

Contact: gia@giarts.org, (206) 624.2312

## Grantmakers CALENDAR

### *June Monthly Program—The Ford Family Foundation's Institute for Community Building*

Thursday, June 16, 2005

9:30 am Registration

10:00 am–2:00 pm Program and Lunch

The Shedd

868 High Street

Eugene, OR

### *Family Foundation Learning Exchange – Crafting Grant Agreements*

Tuesday, July 12, 2005

6:00 pm–7:30 pm

Albina Community Bank

430 NW 10th

Portland, OR

### *July Monthly Program*

Building Bridges: Two Approaches to

Building Community

Shane Endicott, Our United Villages & the

Rebuilding Center

Michael Rohd, Soujourn Theatre

11:45 am–1:30 pm

YWCA, Third Floor Conference Room

1111 SW 10th, Portland

Portland, OR

### *August Summer Social*

Tuesday, August 23, 2005

5:00 pm–7:00 pm

Pasta Bangs

3950 N. Mississippi Avenue

Portland, OR

## 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).

### ***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.

## Learning Circle Proposed

Would you like to discuss and learn more about philanthropy's role in civic education, civil discourse, youth voting, and democracy promotion? We are assessing interest among Grantmakers' members in participating in a small, in-depth learning circle to explore these topics. We envision meeting four to six times this Fall over the lunch hour to hear speakers, discuss readings, and learn about best practices in the field.

Register your interest by contacting Joyce White or Kathleen Cornett. Kathleen: [kcornett@ocfl.org](mailto:kcornett@ocfl.org) or (503) 227-6846 Joyce: [jwhite@gosw.org](mailto:jwhite@gosw.org) or (503) 226-6340.

### *Grantees continued*

The Center for Effective Philanthropy's survey report concludes with some recommendations to foundations:

- Invest in the administrative areas that affect the three main drivers of grantees' satisfaction.
- Support the development of relevant and specific expertise by program officers and other staff.
- Promote grantmaking patterns or policies that increase program officers ability to focus on the three main drivers of satisfaction.

- Maintain a consistent focus and direction.
- Ensure consistency of policy and communications.
- Communicate clearly, consistently, and accessibly.
- Provide feedback to grantees promptly.
- Seek out comparative, confidential perspectives from grant recipients.

In short, foundations can serve their grantees best by offering leadership, clear objectives, and consistency. While grantees will most likely see their

funders in a positive light as long as the funds keeps flowing, funders working in partnership with satisfied grantees can go along way toward their shared vision of change.

A full copy of the Center for Philanthropy's report can be obtained by contacting the Center at (617) 492-0800.

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## What's Happening

Grantmakers welcomes new member **Penney Family Fund** and trustees **Alissa Keny-Guyer, Luisa Adrianzen Guyer and Jeff Malachowsky**. The Penney Family Fund makes grants in Oregon, Washington and California in the areas of community economic development and workforce policy, money and influence in politics, state and local fiscal analysis, strengthening youth and families and sustainable and livable communities.

Grantmakers welcomes new member **The Bloomfield Family Foundation** and trustee Katherine Oberholtzer. The Bloomfield Family Foundation funds primarily in Oregon. Joining Katherine in her work with the Foundation is Margery Bloomfield who lives in Warrenton.

**Wendy Usher** has joined **The Oregon Community Foundation** as a Charitable Gift Planner to provide services to the greater Portland metropolitan area, as well as Marion, Polk, and Yamhill counties. Wendy comes to OCF with a strong non-profit background, including working for The Community Foundation Serving Boulder County in Colorado and the Peninsula Community Foundation in California, as well as other nonprofits.

**Carole Morse, PGE Foundation**, was honored at **Equity Foundation's** 5th annual Investments in Dignity event on March 10th. Carole received the John Grigsby-Jim Vegher Investments in Dignity Award in recognition of her significant contributions of time and energy to champion the dignity and worth of all people.

**David L. Coleman** has been appointed **Program Director for Christian Leadership** by the **M.J.Murdock Charitable Trust**. Dave has served with Youth for Christ in a variety of positions, the latest of which was a Senior Director of Strategic Initiatives. Dave will be leading a new Trust initiative that seeks to attract young potential Christian leaders to consider lives of ministry and to provide ongoing leadership training at all levels for those who have committed their lives to service in Christian organizations.

**Northwest Health Foundation** is the recipient of the **Oregon Psychological Association's 2005 Community Service Award**. This award is presented on an annual basis to a person or group within Oregon outside the formal field of psychology which has, by its actions, theory, or research, promoted or contributed to the emotional and psychological well-being of others through the positive use of psychological principles.

The **Ford Family Foundation** is pleased to announce the selection of **Anne L. Leavitt** as the new director of its Scholarship Programs. She will succeed Edward "Bart" Howard, effective June 15, 2005. Anne comes to the Foundation from the University of Oregon where she was vice president of student affairs. For six years Anne has been an interviewer for the Ford Opportunity Scholarship, a program for single parents started by Hallie E. Ford of Monmouth, Oregon.

## The 2005 Membership Directory is now available online.

In order to keep our membership directory as current as possible, Grantmakers has posted it to our website. You can access the directory by going to [www.gosw.org](http://www.gosw.org) and signing in with your password. Then select Member Directory from the drop down menu under Members. If you have forgotten your password you can obtain it by calling Joyce White at (503) 226-6340.

Updates are made weekly to the online version. We maintain our policy of publishing only the

information you tell us you want included, and then making that information available to members only.

Please assist us in our efforts to keep the directory up-to-date by letting us know whenever there are changes within your organization pertinent to the information included in the directory. To inform us of a change, please email [Pamela@gosw.org](mailto:Pamela@gosw.org).

## NOTICE BOARD

*The Bloomfield Family Foundation*  
2233 SW 18th  
Portland, OR 97201

*Penney Family Fund*  
C/o Common Counsel Foundation  
1221 Preservation Park #101  
Oakland, CA 94612  
Phone: (510) 834-2995  
FAX: (510) 834-2998  
Email: [ccounsel@igc.org](mailto:ccounsel@igc.org)  
Website: [www.commoncounsel.org](http://www.commoncounsel.org)

*Coquille Tribal Community Fund*  
Phone: (541) 756-8800  
FAX: (541) 756-0431  
Email: [info@coquilletribalfund.org](mailto:info@coquilletribalfund.org)  
NEW website: [www.coquilletribalfund.org](http://www.coquilletribalfund.org)

### New Address

*Harry A. Merlo Foundation, Inc.*  
1001 SE Sandy Blvd.  
Portland, OR 97214-1331  
Phone: (503) 963-9463  
FAX: (503) 963-9464

### New Email addresses

*Gary Maffei*  
[gmaffei@hevanet.com](mailto:gmaffei@hevanet.com)  
*Harry A. Merlo Foundation, Inc.*

*Wendy Usher*  
[wusher@ocf1.org](mailto:wusher@ocf1.org)  
*The Oregon Community Foundation*