

# GRANTMAKERS of Oregon and Southwest Washington

AN ASSOCIATION OF GRANTMAKERS INSPIRING EFFECTIVE PHILANTHROPY

## Chalkboard Project

During a legislative session, the state Capitol in Salem teems with insiders, those behind-the-scenes players who influence legislators' public policy decisions on a range of issues.

When it comes to K-12 education policy, those inside players have always been the same—representatives of teachers, school administrators and parents, and others who represent a limited constituency.

Until this year.

Enter the Chalkboard Project, a non-profit organization created in 2003 by five of Oregon's most prominent philanthropic foundations to raise the voice of a critical but often overlooked constituency—the general public—in the debate about how to best spend school tax dollars to improve student achievement, and research the best solutions to the challenges facing Oregon's schools.

Those challenges are plentiful: Oregon is average at best in some key K-12 education measurements, such as student performance on national achievement tests. The new teacher attrition rate is high, as are average class sizes and dropout rates. And Oregon has one of the most unstable school funding structures in the country, because of heavy reliance on an income tax.

"Before we created Chalkboard, all of our foundations were funding education projects, but we weren't impacting the 'big picture.' We lived in our individual silos, and didn't pay a lot of attention to what others were doing," said Norm Smith, president of The Ford Family Foundation and a member of Chalkboard's board of directors. "We decided that had to change. We all wanted to make more of a difference, and to do that, we had to join forces and focus on projects that create true, systemic change.

"From the beginning, we've been different. We built our change agenda for schools not on some preconceived notions about what our foundations thought would work best, but on what research proves will work best, and what Oregonians tell us they want."

Learning the views of Oregonians demanded the most extensive public outreach effort ever conducted in Oregon on K-12 education. Over the course of about two years, Chalkboard used telephone and online surveys, focus groups and gatherings in 400 communities to reach a broad cross-section of Oregonians, approximately 100,000 in all.

"We learned that Oregonians want our schools to be among the best in the country, but they don't want to overhaul the system or pay a lot more to get there," said Sue Hildick, Chalkboard Project president. "They're divided on whether schools need more money, but fairly likeminded in their belief schools need to be more accountable for the results they get with the money they already spend."

Backed by mounds of solid research, Chalkboard became a fierce advocate for targeted spending and financial accountability in Salem this year, and emerged at the end of the legislative session with

several full or partial wins in four priority areas: educator support, early learning, financial accountability and school system funding. The highlights:

### **Reducing New Teacher Attrition**

All new Oregon teachers, principals and superintendents will receive two years of high-quality mentoring, thanks to a new law that phases in this assistance over the next four years. Chalkboard partnered with Stand for Children to advocate for this initiative, which also drew broad support from other education leaders.

### **Investing More in the K-3 Grades**

Chalkboard fought hard to have a small portion of \$260 million in state "school improvement" money dedicated to reducing K-1 class sizes and providing K-3 reading tutors in every district in the state, because those are two interventions proven by research to do the most good at raising student achievement. The Legislature bought in—partly. They included Chalkboard's reading and class size initiatives on the list of approved uses of the fund, but didn't cite them as priorities. Districts must, however, report how their use of school improvement funds is impacting student achievement.

### **Increasing School Districts' Financial Accountability**

Chalkboard helped secure funding for the Oregon Department of Education to undertake a thorough study of the state's school transportation system to determine why costs are above the national average and those of neighboring states, and how Oregon can fund student transportation more efficiently.

The Legislature also approved a process to conduct performance reviews of school district business practices, so that districts can learn about efficient practices from each other and find savings. While these state reviews are voluntary, not mandatory, Chalkboard is supplementing the legislation with its own pilot project, in partnership with the Oregon Association of School Business Officials, to conduct performance reviews of business operations in up to five volunteer school districts and create a "best practices" toolkit. Both of these efforts are aimed at getting a handle on statewide school district business operating costs that are significantly above the national average.

### **Strengthening School Funding**

Lawmakers created the state's first-ever comprehensive rainy day fund to support state services, including K-12 education, during bad economic times, and allocated this year's corporate kicker tax rebates to begin filling that fund. Chalkboard was one of many organizations advocating for these initiatives.

Chalkboard also partnered with the Oregon Business Council to successfully press for an interim

legislative study on improving coordination among the pre-K, K-12 and higher education systems. The study likely will analyze moving from a revenue-based funding system for K-12 education to a per-student spending guarantee, a shift advocated by Chalkboard to better assure stable K-12 funding.

## *Quick Facts About the Chalkboard Project*

**What:** Non-profit organization formed in late 2003 by Foundations for a Better Oregon, a collaboration of The Collins Foundation, The Ford Family Foundation, The JELD-WEN Foundation, Meyer Memorial Trust and The Oregon Community Foundation

**Mission:** Research and facilitate solutions to Oregon's K-12 public education policy issues

**Focus:** Legislative policy initiatives based on best practices research and extensive public outreach to a broad cross-section of Oregonians; leveraging partnerships with parents, businesses, schools and others to increase community and parent engagement in K-12 schools and explore innovative practices to raise student achievement

For more information:

[www.chalkboardproject.org](http://www.chalkboardproject.org)  
[www.openbooksproject.org](http://www.openbooksproject.org)

"Did we get everything we wanted? No. We need to more carefully target our dollars to raise student achievement, and we must add more of the financial accountability for school spending that Oregonians are demanding. But we've laid the groundwork for future progress," Hildick said. "Perhaps most important, we changed the conversation in Salem about money. No longer are our leaders just talking about how much we should earmark for schools—now there are much deeper conversations about how we should spend that money to make the most difference for students."

Meanwhile, Chalkboard continues work on several non-legislative initiatives:

- The Open Book\$ Project Web site ([www.openbooksproject.org](http://www.openbooksproject.org)), created last year to track school district spending, now includes a new year's worth of data and more demographic information about Oregon school districts.
- Earlier this year, Chalkboard launched the CLASS (Creative Leadership and Student Success) Project in three Oregon school districts to

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explore new career and compensation options for educators. The pilot project will experiment with creating new teacher leadership positions, providing more opportunities for collaboration and rewarding individual and/or team success at raising student achievement and meeting school goals through a variety of measures. The pilot districts in Sherwood, Tillamook and Forest Grove will receive Chalkboard funding for three years to implement these programs. The Meyer Memorial Trust and the James F. and Marion L. Miller Foundation have provided significant grants -- \$1.5 million and \$500,000 respectively—to help launch the CLASS Project.

- Chalkboard has partnered with the Oregon PTA, the Oregon Department of Education and individual school districts to improve parent-school communications, from developing strategies to connect with hard-to-reach families to providing computer technology that allows parents to stay in touch regularly with their children’s teachers.

“This is a new world for our foundation community, and we’ve learned a great deal since we first embarked on this journey four years ago,” said Doug Stamm, chief executive officer of the Meyer Memorial Trust and a member of Chalkboard’s board of directors. “Two of the most important lessons are patience and persistence. We can’t just give a large grant and wait for the positive results to roll in. These are tough issues, whether Chalkboard is working with legislators to adjust state policy, or with individual districts to improve parent involvement and transform teacher leadership and compensation. Real change takes time and perseverance.

“The good news is Chalkboard has staying power. We’ll be back in Salem again and again, sharing the research, sharing the message about what Oregonians want for their schools. And in time, our projects outside the legislative arena—particularly the CLASS Project—will create even stronger pathways to our goal of helping all students achieve at higher levels.”

Maintaining Chalkboard’s independent voice in the K-12 debate will clearly be a key as the organization moves forward.

“We don’t fit any of the political or special-interest labels people try to give us,” Hildick comments. “Doing what’s best for kids, what’s proven to work for kids, shouldn’t be a partisan issue, but people try to make it one. We’re promoting a public agenda that truly must transcend partisanship so we can start putting kids first in all the decisions we make about our public schools.”

“Chalkboard is a challenging collaboration among five foundations with different priorities, geographies and philosophies,” said Smith. “Yet this kind of consensus planning has

## Oregonians’ Opinions

Oregonians have strong feelings about their schools. Here’s a sampling:

- 86% agree that attracting and retaining highly qualified teachers is the key to accelerated learning and teaching
- 83% agree that lack of parental support is an obstacle to student success
- 82% believe lack of stable funding is an obstacle to raising student achievement
- 82% think there should be better processes for reviewing teachers’ job performance and setting clear expectations and consequences for those in need of improvement
- 80% believe Oregon schools should be among the best in the country
- 76% agree that helping all students meet state academic standards is a “high” or “urgent” priority
- 75% agree that increases in teacher salaries should be based on performance, not seniority
- 59% say new money for schools should be invested in areas proven to raise student achievement, not to make up for previous budget cuts
- 55% believe there is too much waste and inefficiency in public schools
- 52% say schools don’t have enough money
- 40% believe schools have all the money they need, and should just spend what they have more efficiently

worked well. We’ve already made an impact on our K-12 system in a short amount of time, and our project has captured the attention of more regional and national funders who are intrigued by the impact the foundation community can have on a single or set of issues when it focuses on a collective goal.”

“This is some of the most challenging and intriguing work we’ve ever done at the Meyer Trust, but it’s also arguably the most important,” Stamm notes. “Oregonians repeatedly tell us that they appreciate Chalkboard’s work on their behalf. There’s no question that we’ve brought an important new perspective to the education debate, and we’re making a difference.”

## Opportunities for Strategic Investment in Ending Homelessness

*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.*

As a follow up to a program in April, speaker Paul Carlson offers the following strategies for effective grantmaking.

The development of county and city Ten Year Plans to End Homelessness in Oregon and southwest Washington presents unique opportunities for strategically placed investments in efforts to end homelessness. Ten Oregon counties now are developing such plans, with several more county commissions expected to follow soon.

These Ten Year Plans to End Homelessness represent something new. In the past our homelessness plans were little more than wish lists. Today, the effort to end homelessness brings together community leaders from business, law enforcement, care providers, housing developers, health care, higher education, philanthropy and other influential citizens under the leadership of mayors and county commissioners, to produce plans that chart a course, year by year, to end homelessness. These plans are based on research, expect results, and measure their success by objective outcomes.

Till recently grant making opportunities to benefit homeless people were largely restricted to specific agencies and programs. The new plans to end homelessness present an opportunity to knit together the wide range of homeless programs into a single strategic effort.

Listed below are some examples of targeted investment that can help a community develop a unified effort to end homelessness.

1. Investing in new positions that span agency boundaries and create inter-agency collaborative effort. Investment in such cooperative strategies can serve as a catalyst for agencies to merge their “front door” operations. Private investment may also serve as a catalyst of larger public investment.
  - Housing Locator: Many agencies cooperatively use the same position to broker housing opportunities within the general and government subsidized housing markets.
  - Jobs Locator: Many agencies cooperatively use the

# GRANTMAKERS of Oregon and Southwest Washington and the community have lost two philanthropic leaders.

**Hallie Ford** died in June after a brief illness. Hallie was one of the founders of **The Ford Family Foundation** in Roseburg. Her inspiration, The Ford Opportunity Scholarship Fund, is operated by the Foundation for single parents lacking financial resources for college. While the Foundation confines gifts primarily to rural communities, Hallie herself was a major benefactor of many education and arts projects throughout all of Oregon and supported her high school and college alma maters in Oklahoma. In 1996 Hallie received the Governor's Arts Award for Arts Patronage and Support of Arts Scholarship Programs. She endowed an arts education program for Umpqua Valley Arts Association in Roseburg and was the benefactor of the Hallie Ford Museum at Willamette University. An additional gift to Willamette University will ensure the construction of Ford Hall for academic instruction. Just prior to her death, Hallie endowed the Ford Institute for Visional Education at Pacific Northwest College of Art in Portland. Active in her community, Hallie received the first Citizens Award from the Roseburg Area Chamber of Commerce in 1967. Of her many life accomplishments, Hallie Ford will be remembered for her generous philanthropic support of education and the arts.

**Warne Nunn**, one of the five original trustees named by Fred G. Meyer in 1983 to guide the

**Meyer Memorial Trust**, died in June. At the time of his death, Warne was an emeritus trustee of the Trust and recognized across the state for his involvement and support of a wide range of nonprofit organizations. He may have been the Trust's best ambassador. He tirelessly traveled across the region, visiting grantees and prospective grantees. He always had a word of encouragement for nonprofit organizations and advocated for their needs passionately in meetings with his colleague trustees. Warne was a long-time resident of Oregon, graduating from Salem High School and Willamette University. He never forgot his own childhood growing up on a farm in rural Oregon and he never passed on an opportunity to speak for the needs of rural Oregon. He served under two Oregon governors, Elmo Smith and Mark O. Hatfield. He was executive assistant and chief of staff to Governor Mark O. Hatfield during his two-term tenure and then helped open Hatfield's office in Washington, D.C. after his election to the U.S. Senate in 1966. Returning to Oregon, Warne spent 18 years in successive capacities at Pacific Power and Light, retiring as Corporate Secretary in 1983. Warne was a longtime member of Willamette University's board of trustees. He will be missed by the many people he touched around the state of Oregon and by his colleagues in the philanthropic community.

*Ending Homelessness continued from Front Page*

same position to locate job opportunities for homeless persons. This approach is especially effective for temporarily homeless persons or persons at risk of homelessness due to job loss.

- Coordinated Entry: This approach incorporates the above two positions along with a centralized approach to emergency triage, screening and housing placement.
  - Coordinated Outreach and Engagement: Case manager "companions" who span system boundaries and who follow individual homeless people through all the "hoops" from streets to housing and jobs. The program called JOIN in Portland is a national best practice of such a program.
2. Investing in efforts of local faith and social institutions to meet emergency needs of homeless people. Survival needs of unsheltered individuals, youth, parent and children must be met even while longer term solutions are being developed. However, there are cost effective ways to provide for basic sustenance and survival that avoid an institutionalized approach.
    - Example: Interfaith Hospitality Network: This national program assists local communities by providing a blueprint and hands on expertise to develop inter-church cooperation in providing emergency shelter for homeless people. Investment in start up operations could rapidly expand these networks.
  3. Investing that creates interagency cooperation in homelessness prevention.
    - Example: Coordinated entry as mentioned above, add prevention activities to this hub approach: Community Action Agencies
- throughout the state are currently gearing their services to assist with this transition to coordinated entry. Other agencies must see the benefit of giving up immediate control of who is served or housed through their agency. Pilot or start-up funds are needed for this approach.
4. Investing in the long-term sustainability of permanent, supportive housing.
    - "Sinking funds" have become a new tool to provide stable and sustainable housing based services for permanent supportive housing. A sinking fund is a time limited endowment of these services often from between 5-10 years.
    - Housing: Investing in the construction of housing through agency capital campaigns remains important. Research demonstrates conclusively that permanent, supportive housing is the best investment for individuals and families with disabilities and complex social needs.
  5. Project Homeless Connects
    - These events bring together a wide array of services for homeless people under one roof for a single day. Everything from housing and jobs to haircuts and dental care to benefits and legal help are brought together to help homeless people. These events have dramatic impact on the political and community will to end homelessness.
    - These events have been staged in Eugene, Portland, and Hillsboro. Relative modest investments could increase their frequency and provide incentives for smaller communities to create such events.
  6. Consumer scholarships: The participation of homeless and formerly homeless persons in the de-

## Grantmakers CALENDAR

*Corporate Funders Learning Exchange—Corporate Philanthropy & Advocacy*

Thursday, August 2, 2007

7:30 am–9:00 am

Nau, Inc.

1624 NW Lovejoy

Portland, OR

Sponsored by: Nau

*Special Program—Grantmakers on Board: Exploring the Unique Issues of Hillsboro, Washington County*

Thursday, August 9, 2007

8:00 am–2:30 pm

Transportation by bus to Hillsboro—Details on the web or call 503.226.6340

Sponsored by: Intel, NW Natural and Spirit Mountain Community Fund

*Third Thursday Program—Grantmakers in the Arts*

Thursday, September 20, 2007

11:45 am–1:30 pm

Museum of Contemporary Craft

724 NW Davis

Portland, OR

Sponsored by: The Oregon Community Foundation

*Southern Willamette Valley Grantmakers Affinity Group—Planning and Implementing Effective Site Visits*

Friday, October 5, 2007

11:45–1:30 pm

Location to be determined

Eugene, OR

*Central Oregon Grantmakers Affinity Group—The Philanthropic Landscape in Central Oregon*

Tuesday, October 9, 2007

2:00 pm–4:30 pm Program, Social Hour to follow

Deschutes Brewery

Bend, OR

*Southern Oregon Grantmakers Affinity Group—The Challenge of Change in Southern Oregon*

Tuesday, October 23, 2007

8:00 am–3:00 pm

Ashland Springs Hotel

Ashland, OR

velopment and implementation of Ten Year Plans is an important component to the new strategies.

- Training scholarships might be provided to enable homeless and formerly homeless persons to attend state wide and national conferences on housing and homelessness in order to cultivate their meaningful leadership in the local homelessness plans.

Paul Carlson, Regional Coordinator  
US Interagency Council on Homelessness  
909 1st Avenue, Seattle, WA 98104  
206.220.5362

## What's Happening

GRANTMAKERS welcomes new member the **Kirby Foundation** in Bend, Oregon. The Foundation focuses its funding on children, families and the homeless. Representing the Kirby Foundation is **Laurel Francis**.

**Valarie Rundquist** has joined **The Oregon Community Foundation** in the newly created position of Endowment Partners Program Officer. Val came to OCF with a background in financial services with U.S. Trust and Mellon Financial.

**Philip Varnum** was named the Chief Financial and Administrative Officer of **The Lemelson Foundation**. Prior to joining the Foundation, Philip held the position of Chief Financial Officer at Portland State University Foundation. He has experience in nonprofit management and business administration and earned a MBA from Loyola Marymount University.

**The Oregon Community Foundation** has named **Julie Gregory** as the Charitable Gift Planner for Central and Eastern Oregon. Julie has practiced law in Bend for the past seven years.

**Nancy Hales** recently retired from the **Community Foundation** serving Clark, Cowlitz and Skamania counties. Nancy had been the Foundation's

president for 15 years, beginning as its first paid executive in 1992. Under her leadership the Foundation grew from under \$2 million to an endowment now exceeding \$56 million. Nancy plans on taking a brief sabbatical before opening a consulting practice. A successor is being recruited.

**Richard (Rick) Melching**, retired superintendent of the Evergreen School District has been named interim executive director at the **Community Foundation** serving Clark, Cowlitz and Skamania counties.

Thank you to our recent program sponsors:

**Community Foundation** serving Clark, Cowlitz and Skamania Counties

**The Lemelson Foundation**  
**Northwest Health Foundation**  
**Siletz Tribal Contribution Fund**  
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**Northwest Natural**  
**Spirit Mountain Community Fund**  
**Key Bank**

## NOTICE BOARD

*Kirby Foundation*  
20355 Tumalo Road  
Bend, Oregon 97701  
541.389.4853  
laurelfrancis@gmail.com

*New Phone and Address*  
*JW & HM Goodman Family Foundation*  
PO Box 5756  
Portland, OR 97228-5756  
Phone: 503.750.1814

*J.F. R. Foundation*  
New Suite Number: 2840

*PGE Foundation*  
Add Randy Miller to trustee list

*Change: Portland Womens Union Foundation*  
*to: Portland Women's Foundation*

*Social Venture Partners*  
221 NW Second, Suite 210  
Portland, OR 97209  
Phone remains same: 503.222.0114

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## Spirit Mountain Community Fund Celebrates its 10 Year Anniversary

In 1997 the Confederated Tribes of Grand Ronde began making its first gifts through its tribal foundation. To date Spirit Mountain Community Fund has made over 1,000 grants totaling over \$39 million.

To commemorate the successes of the Fund, the Tribe and Community Fund will host an invitation-only event on Thursday September 13th. Invited guests will include prior grant recipients, Tribal leaders from across the State, legislators, senators, and of course, members of Oregon's philanthropic community. Members of GRANTMAKERS of Oregon and Southwest Washington will receive invitations to attend.

Being a 10 year celebration, there will be special tribute paid to the early founders and visionaries of the Fund. Festivities will include tribal drumming and dancing and the event's theme is "Let the drum beat of your heart lead you home." For more information about this event, please contact Spirit Mountain Community Fund at 503.879.1400.