

GRANTMAKERS of Oregon and Southwest Washington

AN ASSOCIATION OF GRANTMAKERS INSPIRING EFFECTIVE PHILANTHROPY

Assisting Organizations in Transition: Money and More

A CEO, after 20 years as head of her organization, is about to retire. When they learn about her plans, several funders hesitate to commit to their usual grants. They're worried about the impact of the transition—will the organization sink or swim? What's the best stance for a grantmaker to take toward nonprofit leadership change?

Conversations with experienced grantmakers reveal these general approaches:

1. Address leadership transitions systematically through a foundation-wide program. A few foundations see leadership succession as an issue affecting so many of their grantees that they choose to approach it systemically. Some develop proactive programs, researching and acting in anticipation of a projected leadership crisis in their region or field or offering support for advance succession planning as a matter of course to their grantees. Others create programs that allow them to react helpfully when transitions occur in grantee organizations, often by developing expertise in transition planning within their own management staff.
2. Strategically approach the grantees with whom you work. Some choose to be proactive with grantees critical to their field or community. For example, a grantmaker at a large national foundation saw that leaders in a relatively new and fragile field were beginning to reach their fifties and sixties. She asked herself what she could do to help them think through their future transitions and encourage leadership development within their organizations. She hired consultants to provide support services to long-time CEOs and made a point of raising the issue in discussions with upcoming leaders and within the field as a whole.

3. Lend support when asked. Some grantmakers simply respond to requests for help with leadership succession when asked. A grantmaker that focuses on economic and social justice recalled the case of a longtime executive director who came to her after he suffered a serious illness—his “wake-up call.” Worried that the organization was too dependent on him, the director asked for help in thinking through how to move out of his job in the next year or two. His request gave her an opening to offer ideas for bringing his board of directors into the process.

A Grantmaker's Role

Besides sustaining its funding, what can a foundation do to help a valued organization through a leadership transition? Grantmakers endorsed several specific tactics: some involve money, but others do not.

Transition Grants

These grants can pay for advertising for a new leader, strategic planning, coaching, full transition consultancy services or hiring a search firm. These grants can also be used as a bridge grant, over and above a funder's normal grant, to make up for the decline in funding that can accompany a transition.

Information and In-Kind Assistance

Foundations can use their own publications and training programs to raise awareness of the importance of effective transitions and the value of transition services.

Succession Planning

Some funders urge their grantees to have in place a written leadership succession plan, covering both what would happen if the CEO needed to leave in an emergency and how the organization would handle a transition process.

Funder's Collaboratives

Some foundations have formed funders' collaboratives to expand the availability of money and other resources to help organizations with leadership change.

Make Common Cause with the Board

When a grantmaker offers to assist with an executive transition, the recipient of that assistance is most likely to be the organization's board of directors and the focus now is on helping the board take the organization through the transition in a thoughtful, responsible way.

- Develop a relationship with board leaders in advance. It's not unusual for a grantmaker to get to know an organization's board only when the departure of a CEO is imminent. Establishing relationships helps keep everyone informed therefore making a transition less stressful for all involved.
- Help familiarize boards with leadership succession resources. Funders can incorporate information about resources for supporting executive transitions into board training programs or publications.
- Recommend an analysis of the organization's finances. A grantmaker can play a crucial role by helping an organization arrive at a true picture of its financial stability and sustainability.
- Encourage succession planning. The idea is to have an organizational leadership team of staff and board in place, where people are trained to step in when leaders are pulled away in emergencies, but also to encourage recognition of the importance of building leadership capacity in order to successfully navigate both emergency and planned transitions.

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GRANTMAKERS is pleased to welcome the following new members:

Deacon Charitable Foundation
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Grantmaker FOCUS

BOARD OF DIRECTORS

Doug Stamm
Meyer Memorial Trust
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Michele Goodman
J.W. and H.M. Goodman Family
Charitable Foundation
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Linda Wright
US Bancorp Foundation
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Joyce Akse
The Ford Family Foundation

Jeff Anderson
The Oregon Community Foundation

Kathy Bryon
Gordon Elwood Foundation

Nancy Hales
The Community Foundation

Shelley Hanson
Spirit Mountain Community Fund

Bruce Kelley
Lora L. and Martin N. Kelley
Family Foundation

Julia Novy-Hildesley
The Lemelson Foundation

Kandis Brewer Nunn
Jordan Schnitzer Family Foundation

Linda Shelk
John & Linda Shelk Foundation

Von Summers
NW Natural

Linda Traeger
Equity Foundation

Joyce B. White
Executive Director

Megan Wentworth
Member Services Associate

NEWSLETTER COMMITTEE

Shelley Hanson
Michelle McClellan
Joyce White

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 or by mail to Grantmakers of Oregon and Southwest Washington, P.O. Box 6381, Portland, OR 97228-6381.

GRANTMAKERS: MEET YOUR NEW BOARD MEMBERS

Each year we like to spotlight our new board members, those individuals that commit their time and leadership skills to GRANTMAKERS of Oregon and Southwest Washington. In this issue, we'll introduce you to Linda Shelk, John and Linda Shelk Foundation and Jeff Anderson, The Oregon Community Foundation.

Linda Shelk, John and Linda Shelk Foundation

Describe briefly the personal/professional journey that led you to the field of philanthropy.

I married into a family which has a tradition of philanthropy with an advised OCF family fund. John and I have continued that tradition with our own personal Foundation. Having an educational background, I volunteered in non-profits relating to education and children and later funded those areas. In addition, our rural community has many needs, especially technical assistance, which we fund.

What excites you most about your membership on the Board of GRANTMAKERS?

I am interested in learning the approaches to gifting that other foundations have used and the strategies of utilizing dollars in the most productive fashion.

What do you think are the greatest challenges facing the philanthropic sector in the next couple of years?

I believe the sector needs to address the issue of funding for operating support versus funding new projects. Organizations are straining to do their missions without adding new projects.

What are your most urgent hopes/fears about Oregon and Washington and the communities served by GRANTMAKERS members? How can funders most effectively leverage the opportunities and ameliorate the challenges?

I am concerned that the challenges of scarce government resources will consume philanthropic efforts in trying to maintain programs that formerly were supported by taxpayers. Does this mean taxpayers' values are changing and philanthropy is trying to maintain status quo? How do we continue to reflect our values and our communities' needs while society is changing?

Jeff Anderson, The Oregon Community Foundation

Describe briefly the personal/professional journey that led you to the field of philanthropy.

Philanthropy isn't a field I aspired to, but it's a natural progression for people who commit their working lives to making change in the world—whether they're educators, activists, nonprofit staff, healthcare workers, or artists. I think we all have a common goal at the core of our work, which involves helping people to think and act more humanely, which naturally leads to a stronger sense of understanding and shared responsibility for our communities. I've been fortunate to work in three fields that meshed well with my values ever since graduating from college—higher education development at Vanderbilt and Lewis & Clark, community organizing at Oregon Fair Share, and philanthropy with The Youth Project and OCF. When I was interviewing for my position at OCF eight years ago, I described this as a career "lattice." Everything I've done has helped to shape my approach to the next position.

Those of us in professional philanthropy are tremendously lucky. We are privileged to work with many of the brightest thinkers, most inspired leaders, and most selfless volunteers in Oregon. They profess diverse political views, they come from every income level, and they constantly try to figure out how to do things better.

What excites you most about your membership on the Board of GRANTMAKERS?

I'm excited by the opportunity to encourage all of us, including myself, to try to think more deeply and clearly about what we do; to position private philanthropy as a helpful, honest partner with communities (rather than a somewhat lofty and mysterious bestower of gifts); and to deepen my relationships with people whose work I really respect.

What do you think are the greatest challenges facing the philanthropic sector in the next couple of years?

Clearly we have a lot of communicating to do. For example, Congress has acted rather unwisely, I think, in the past year in passing laws that created unwarranted complications for private philanthropy based on a very few sensational abuses that are extremely uncharacteristic of foundations. We need to raise the profile of organized philanthropy as a critical partner in solving community problems. We need to continue to work at working together, whether in formal collaborations or informal networking. There's also always a challenge for funders in warding off complacency. Grantees tend to give us a steady stream of positive feedback, which is understandable but it can lull us into thinking we're doing everything right when we still have a lot to learn. We have to be pretty self-critical.

What are your most urgent hopes/fears about Oregon and Washington and the communities served by GRANTMAKERS members? How can funders most effectively leverage the opportunities and ameliorate the challenges?

Complacency, which I mentioned above, is also a challenge for the Northwest. Everyone else around the country seems to envy the region's achievements in transportation, planning, sustainability, etc., but we need to ignore our good press. In Oregon, we have serious issues with K-12 education, higher education, land use planning, rural poverty, affordable housing, pollution, arts funding, drug and alcohol abuse, and many other issues that need no elaboration here. Our urban and rural communities need to rediscover each other and realize the huge potential in their interdependency. We also need courageous leaders in every sector who are willing to bypass ideology and concede some of their interests in order to arrive at positive results for the whole. We still have a relatively small population and a fairly accessible system in which it's possible for average citizens to be heard. Foundations can help people to develop ideas and programs that work, educate people about the results, and get proven ideas onto the public's agenda for broader investment. We may need to have a bolder collective voice at the public policy level in order to attract attention to excellent programs.

New Regional Philanthropy Calendar

Grantmakers are busier than ever! Across Oregon and southwest Washington grantmakers are continually hosting and attending events to further philanthropy in the region. Over the next month and half alone there will be an educational summit in Douglas county, corporate funders will discuss board leadership, members will come together around homelessness, leaders in southern Oregon will hold a community dialogue, The Oregon Community Foundation will host its annual meeting and new grantmakers will have an opportunity to attend an all day, skill-building workshop. And those are just the events we know about.

In an effort to provide a central reference point for funders, GRANTMAKERS of Oregon and Southwest Washington is adding a new feature to our website homepage, a Regional Philanthropy Calendar. This tool allows members to add funder specific events to the existing GRANTMAKERS calendar. The events appear on the right hand side of every webpage on the site. The events can also be viewed in a monthly calendar format or as a convenient reference list.

Our goal is to make it easier for our members to assemble, engage and collaborate. The Regional Philanthropy Calendar is our attempt to help you coordinate with one another.

For more information or to add an event to the new GRANTMAKERS of Oregon and Southwest Washington Regional Philanthropy Calendar please visit www.gosw.org or email megan@gosw.org or call 503.226.6340.

Center for Philanthropy Opens For Business

Two decades ago Thomas Aschenbrener, President of the Northwest Health Foundation, was in the consulting business, assisting philanthropists invest in worthy causes. Many of these socially-minded donors worked from home; others from cramped, isolated offices. "My clients struggled to find a workplace that met their needs," he explains. "On a day-to-day basis, their need for an office suite might fluctuate. But trustees and staff of small family foundations, in particular, wanted a place to meet with grant seekers in a professional setting, not at the corner coffee shop."

The new Center for Philanthropy is the realization of Thomas' vision to create a unique home for funders. A total of eight suites are available for lease on the second floor of the three-story, 30,000-square-foot facility, the former headquarters of Portland's Chamber of Commerce. Tenants will also have access to several conference rooms and some administrative support.

The opportunity to purchase a building in Old Town, a neighborhood slated for redevelopment, clinched the deal for the Northwest Health Foundation's finance committee. NWHF now occupies the entire third floor and is recruiting tenants from the foundation community for the second, part of which is leased by the University of Oregon.

One of the Center's first tenants will be the Spirit Mountain Community Fund. Director Shelley Hanson



says, "Being a rural funder, it's an excellent opportunity for Spirit Mountain Community Fund to have a place to hold meetings with potential grantees in their neighborhood. We are also excited to have the opportunity to work next to fellow funders; to learn from their programs and services and to share any knowledge we may have that's valuable to other grant makers."

Norm Smith, President of the Ford Family Foundation, is enticed by the prospect of having a small, satellite office in

Portland, adjacent to other philanthropies. "We have important relationships and grantee affiliations in the Portland metro area, even though the thrust of our mission is to serve rural Oregon and northern California," he says. "Since a few of our Board Members and Roseburg/Eugene staff pass through the area each month, often overnight, we hope this location will serve as a tool for efficient use of time while away from 'home.' The larger meeting facilities available from NWHF are also an inducement to have a presence with professional colleagues, all at a low or no cost," he adds.

All of this promises easier access to foundation staff and trustees for the nonprofit community in our region.

Save the date! GOSW members are invited to an open house at the Northwest Health Foundation's new headquarters on Thursday, May 3rd from 4-6:30 p.m. To inquire about available suites, contact Thomas Aschenbrener at 503-220-1955.

Grantmakers CALENDAR

Third Thursday Program—Ending Homelessness

Thursday, April 19, 2007

9:30 am–2:30 pm

YWCA, Third Floor Conference Room

1111 SW 10th

Portland, OR

Speakers: Gretchen Kafoury, Portland State University Urban Affairs and Public Development; David Wertheimer, Senior Program Officer for the Bill & Melinda Gates Foundation; Paul Carlson, HUD Interagency Homeless Coordinator; Doreen Binder, Transition Projects; Kathy Oliver, Outside Inn; Janet Byrd, Neighborhood Partnership Fund; Sally Erickson, City of Portland and more.

Skill Building Workshop—Grantmaking 101

Tuesday, May 8, 2007

8:30 am–4:00 pm

Northwest Health Foundation

221 NW Second Avenue, Conference Room

Portland, OR

Speakers: Cynthia Addams, The Collins Foundation, Kit Gillem, M.J. Murdock Charitable Trust; Norm Smith, The Ford Family Foundation; Gary McGee, Gary McGee and Associates; Anita Rogers, McKenzie River Gathering and more.

Third Thursday Program—Foster Care

Thursday, May 17, 2007

11:45 am–1:30 pm

YWCA, Third Floor Conference Room

1111 SW 10th

Portland, OR

Corporate Funders Learning Exchange—TBA

Thursday, June 7, 2007

7:30 am–9:00 am

Location to be determined

Summer Social for Grantmakers and Guests

OMSI—The Body Exhibit

Thursday, June 21, 2007

5:30 pm–9:00 pm

Advance Reservations Required

Transition continued from Front Page

- Offer to hire a transition consultant or search firm. Paying for a consultant, one grantmaker explained, can be a good way to support a transition while keeping an appropriate distance from the organization.

Grantmakers regularly witness executive transitions and, because good leadership is crucial to an organization's success, may even decide to get involved. Some grantmakers go further and support more systemic efforts to assist with nonprofit

leadership successions. A grantmaker interviewed for this guide who believes in the importance of executive transitions and succession planning advises: Make the leap of faith. Assume that whatever the organization has been doing they will continue to do...but if all of us withhold our funding, there isn't a chance.

Read the full guide, *Executive Transitions: Grantmakers and Nonprofits Leadership Change*, or visit www.grantcraft.org.

Adapted from GrantCraft's "Executive Transitions: Grantmakers and Nonprofit Leadership Change" and reprinted with permission by Grantmakers for Effective Organizations | 1413 K Street, NW, 2nd Floor | Washington, DC 20005 | 202-898-1840 | 202-898-0318 (Fax)

What's Happening

The **Portland Women's Union Foundation** is celebrating 120 years of service, women helping women in need. The Foundation provides grants to organizations which address the needs of women for housing, health, education and respite care while providing them with the opportunity to achieve self-esteem and self-sufficiency.

Among the philanthropic organizations reaching significant milestones is **McKenzie River Gathering**, celebrating its 30th anniversary. The McKenzie River Gathering Foundation pools the financial resources of Oregon's progressive community and distributes it back to grassroots groups working on a variety of social change issues. Examples of funded issues include globalization, poverty, war, racism, sexism, homophobia and environmental destruction.

Arlene Siegel Cogen has joined **The Oregon Community Foundation** staff as a Charitable Gift Planner to provide services to the greater Portland metropolitan area and north coast. Most recently, Arlene worked as a Vice President with West Coast Trust and Allen Trust Company. Arlene serves on the board of Northwest Planned Giving Roundtable.

Social Venture Partners Portland has a new executive director, **Mark Holloway**. Mark was most recently the Manager of Corporate Outreach for The Global Business Coalition on HIV/Aids, Tuberculosis and Malaria in New York City. Previous to that, Mark was with the Community Resource Exchange (CRE). CRE provides management assistance in fundraising, communications, and organizational development to leaders of New York's nonprofit community. Mark has direct experience in building coalitions, fundraising, organizational development, public relations and teaching.

Cindy Knowles has been selected as Director of Programs for **The Collins Foundation**. Cindy comes to the grantmaking community from Oregon Public Broadcasting where she served as director of program project development for the past ten years. Prior to her work with OPB, Cindy served two years



Linda Wright

as a public relations consultant with the Campaign for Equal Justice, seven years as the public affairs and editorial producer for KGW-TV, two years as an investigator/paralegal with a local law firm, and five years as the manager of trial assistants with the Metropolitan Public Defenders office.

GRANTMAKERS board member **Nancy Hales, Community Foundation for Southwest Washington**, has been named treasurer for GRANTMAKERS of Oregon and Southwest Washington beginning April 1, 2007. Nancy also heads the organization's sponsorship committee and is on the public policy work group.

David Wynde has rejoined **US Bank** as Vice President and Manager of Community Relations and will be replacing Linda Wright at **US Bancorp Foundation**. David is currently on the Portland School Board and prior to his election, was on the board of the Portland Schools Foundation. David is a graduate of the University of Nottingham with a Masters in Social Work from the University of Hawaii.

Thanks to **Duncan and Cindy Campbell** and **The Campbell Foundation** for sponsoring the March program on Birth to Three.

Thanks to **Von Summers** and **NW Natural** for funding the April program on Ending Homelessness.

Additional thanks to **Jane Scrutton** and **Key Bank** for hosting the Corporate Funders Learning Exchange.

After 31 years with **US Bank** and 25 years with **US Bancorp Foundation**, **Linda Wright** has retired to enjoy traveling and golf with her husband Jerry. Linda was a founding member of GRANTMAKERS and has served as the board treasurer the past two years. Linda will be missed by all who have worked with her and were inspired by her commitment to the state. Linda will continue to contribute to the community through board service and support

for the nonprofit community.

NOTICE BOARD

New Address

Northwest Health Foundation
221 NW Second Avenue, Suite 300
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Phone and Fax remain the same

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