

GRANTMAKERS



of Oregon and Southwest Washington

2008 Regional Conference

*From Roots to Treetops:
Growing, Connecting &
Sustaining Strong
Communities*

OCTOBER 15, 16, 17 | FIVEPINE LODGE | SISTERS, OREGON

Expand how you think about your work. Join us for plenary, break-out and networking sessions, and cover some new ground—literally. A local planning team will take you off-site to experience firsthand where and how work is being done by our nonprofit partners. Hike stream banks, visit nonprofit organizations delivering critical services, and compare how issues challenge rural and urban communities.

For updates and more information visit: www.gosw.org/grant/makers/event/1722

Presenting Sponsor

U.S. TRUST 

Bank of America Private Wealth Management



Wednesday, October 15, 2008

9:00 am–12:00 pm | REGISTRATION

12:00–1:15 pm | OPENING LUNCH AND SPEAKER

Setting the Stage—Philanthropy and Place

Speaker: Kim Stafford. Author, Poet, Songwriter

Oregon writer Kim Stafford opens the conference with inspired thoughts on the future of the places we call home and how philanthropy plays an important role in creating, connecting and telling stories of the human experience. Kim has received two creative writing fellowships from the National Endowment for the Arts and his book, *Having Everything Right*, won the Western States Book Award in 1996.

Sponsored by Northwest Health Foundation, Kaiser Permanente Northwest

1:45–4:30 pm (with break) | WORKSHOP

High Impact Philanthropy

Speaker: Jeff Bradach, The Bridgespan Group

More and more grantmakers are wrestling with what it means to give “strategically.” However, achieving and measuring impact is exceptionally difficult. In the complex world of funding, it is difficult to determine if what is being achieved is a direct result of our intervention. This ambiguity and complexity heighten the risk that philanthropic initiatives will fall short, risk that can be mitigated only through thoughtful and disciplined decision-making. Jeff Bradach is the Managing Partner and Co-founder of the national consulting firm The Bridgespan Group. During this workshop he will lead participants through an exploration of high impact philanthropy, harnessing the collective knowledge of participants to generate new ideas.

Sponsored by Meyer Memorial Trust

4:30–5:30 pm | HEALTH BREAK (RESOURCE CENTER OPEN)

6:00–7:00 pm | RECEPTION

7:00–9:00 pm | DINNER

The Wednesday reception and dinner will be a welcome break from an afternoon of work and gives funders a chance to renew acquaintances and meet new colleagues. Brad Tisdell, Sisters Folk Festival and Sisters Americana Project, and a group of talented local musicians will provide the entertainment, blending their musical and songwriting talents with the subject of philanthropy.

Reception sponsored by Arnerich Massena & Associates

Dinner sponsored by The Ford Family Foundation



Thursday, October 16, 2008

7:30–8:30 am | THURSDAY BREAKFAST

Open Networking and Table Topics

In every survey and evaluation, members say that networking and talking with funders who share similar interests are the most important reasons to belong to GRANTMAKERS. The networking breakfast gives funders an opportunity to be intentional about scheduling a breakfast roundtable on a subject or to meet with other funders who are doing similar work. This is always one of the highest rated sessions of any conference. You are welcome to submit a topic!

Sponsored by James F. and Marion L. Miller Foundation

8:45–10:15 am | THURSDAY MORNING BREAK OUTS

Concurrent Sessions A–E

SESSION A: ARTS EDUCATION: EVERY CHILD DESERVES IT

Speakers: **Eloise Damrosch, Regional Arts and Culture Council**
Cate O'Hagan, Arts Central
Deb Vaughn, Oregon Arts Commission

This session will explore models for bringing arts education back into our public schools in rural as well as urban communities. Research is wide and deep that children who have regular arts experiences are better learners and become more engaged adults. Programs around the state are helping teachers access arts providers and integrate arts experiences into other core curriculum areas, as well as helping artists meet the needs of teachers and students.

Sponsored by The Harold & Arlene Schnitzer CARE Foundation

SESSION B: SOCIAL VALUES RESEARCH & THE ENVIRONMENT

Speakers: **Buck Parker, Earthjustice**
Cara Pike, Earthjustice

Earthjustice is a national nonprofit environmental law firm that recently completed the Northwest Social Capital Project, applying social values research and planning to the challenge of building an engaged and politically influential base of support within the region for a healthy environment. Focusing on Washington and Oregon, the project resulted in a detailed guide to social values in the two states. Earthjustice is making this research available to nonprofit groups to help them reach a new generation of advocates for the environment.

Sponsored by Jubitz Family Foundation

SESSION C: MAKING THE MOST OF YOUR ASSETS

Speaker: Kipp Baratoff, Equilibrium Capital Group

This session will explore the state of the market for mission related investing and how funders can use all of their foundation assets—including both below market rate and market rate investments—in addition to making grants in order to creatively support the foundation’s mission and maximize both financial and social value.

Sponsored by Albina Community Bank

SESSION D: BUILDING COMMUNITY THROUGH RACIAL & SOCIAL JUSTICE

Speakers: Shelley Hanson, Spirit Mountain Community Fund

Scot Nakagawa, Social Justice Fund NW

Anita Rodgers, McKenzie River Gathering Foundation

What do social justice, racial justice and diversity mean to you? Foundations are using these words more frequently than ever before to describe their work, but have many different interpretations of what they mean. This will be an interactive conversation about what social and racial justice looks like in the 21st century. Our panelists will share innovative grantmaking models and lead a discussion on what we can all do to support a more just and equitable world.

Sponsored by Northwest Health Foundation

SESSION E: TRANSFORMING AND REFORMING HEALTH CARE

Speakers: Liz Baxter, Archimedes Movement

Maribeth Healey, Oregonians for Health Security

Bill Kramer, Health Care Consultant

Laura Brennan, PacificSource

Kieren Porter, Regence Blue Cross Blue Shield

Health care is a national, state and individual issue. No one person, organization or political entity is immune from the impact of the health care system we’ve inherited. Many consider our current system outdated and needing reform. Our panel of speakers will address the current challenges and offer ideas for the future of a health care system focused on health, accessibility and reasonable cost for all. You’ll hear the voice of consumers, government, business, collaborations and funders.

Sponsored by The Regence Foundation

WHEN YOU PARTICIPATE IN A GRANTMAKERS’ CONFERENCE, YOU ARE CONTRIBUTING TO A GREEN EVENT!

Grantmakers is proud to announce that the 2008 Conference is a carbon neutral conference. We have calculated and offset 13 tons of generated CO₂ emissions—pollutants produced by field trip bus emissions and heating, cooling and light emissions from the FivePine Lodge and Conference Center space. These offsets are dedicated to the Bonneville Environmental Foundation to assist in current projects like the Midstate Electric Cooperative in La Pine, SeQuential Biofuel Station in Eugene, projects in 23 public schools around the state of Oregon as well as 8 Clark County Public utilities. If you would like to learn more and do your part to offset your Conference travel CO₂ emissions, please visit www.nativeenergy.com or www.greentagsusa.org and consider offsetting your travel pollutants.

10:30 am–12:00 pm | THURSDAY MORNING BREAK OUTS

Concurrent Sessions F–J

SESSION F: SUCCESSION PLANNING FOR PHILANTHROPISTS—THE COMMUNITY 101 MODEL

Speakers: Carol Reed, PGE Foundation

Kathleen Cornett, The Oregon Community Foundation

Succession planning is on everyone's mind these days with the upcoming retirement of baby boomers. Philanthropy is no exception. The Oregon Community Foundation and PGE Foundation will give an overview of why they have joined together in a collaboration focused on youth philanthropy as a vehicle for encouraging youth giving and building philanthropic traditions. National models of youth philanthropy will be reviewed, as well as how youth philanthropy is being embraced in the region.

Sponsored by PGE Foundation

SESSION G: WHERE CAN YOU FIND THE DATA?

Speakers: Adam Davis, Davis, Hibbits & Midghall, Inc.

Lena Etuk, Oregon State University

Marie Deatherage, Meyer Memorial Trust

Our panel of experts will explore where funders can go to collect and evaluate information and how that information can be effectively vetted and shared. We'll look at three very different sources and examples of how funders have used them to inform their grantmaking—polling, research, and a web-based user-driven information sharing platform. You'll see the power of the Rural Community Explorer and Connectipedia.

Sponsored by Pacific Power Foundation

SESSION H: BEYOND BALANCE SHEETS: ASSESSING NONPROFITS CAPACITY FOR GROWTH

Speaker: Nanita McIlhatten, AKT, LLP

This session will explore how funders can assess their grantees need and readiness for growth using their financial systems as a lens. Participants will walk away with concrete tools for drawing connections across an organization's application, financials and discussions. The process features setting expectations based on the organization's stage of development and constructing basic financial projections to create a basis for assessment.

Sponsored by The Standard



SESSION I: EMPOWERING RURAL COMMUNITIES THROUGH LEADERSHIP

Speakers: Tom Gallagher, The Ford Family Foundation
Joyce Akse, The Ford Family Foundation
Jim Walls, Lake County Resources Initiative

The Ford Family Foundation's Leadership Institute has been empowering Oregon's rural communities through leadership training, grants and resources since 2003. The 1791 graduates are making a difference in the development of vital rural communities all across the state. Hear from the Institute's director and associate director about the program design, what they have learned, and how this matters to other funders now and in the future.

Sponsored by Lora L. and Martin N. Kelley Family Foundation

SESSION J: OPPORTUNITIES FOR IMPACT—ADVOCACY AND PHILANTHROPY

Speakers: Kim Thomas, Meyer Memorial Trust
Dr. Tina Castanares, Northwest Health Foundation
Lynn Lundquist, Crook County Commissioner, Former Speaker of the House
Monique Barton, The Regence Foundation

Advocacy is a tool that can enhance your grantmaking portfolio. This session will explore the opportunities for funders to increase their impact through action or by funding organizations that do advocacy. We'll look at both the legal and philosophical aspects of entering this work and hear from colleagues who have had first-hand experience—and results. They will talk about why they chose to focus on advocacy, lessons learned in the field and why more funders are choosing to participate in public policy.

Sponsored by The Regence Foundation

12:30–4:30 pm | THURSDAY AFTERNOON OFF SITES

Five Concurrent Sessions

EFFECTIVE PARTNERSHIPS FOR WATER RESOURCES AND NATIVE FISH IN THE DESCHUTES BASIN

Speakers: Tod Heisler, Deschutes River Conservancy
Brad Nye, Deschutes Land Trust
Bobby Brunoe, Confederated Tribes of Warm Springs
Ryan Houston, Upper Deschutes Watershed Council
Ted Wise, State of Oregon
Julie Kiel, Portland General Electric

This off site will explore issues of water resources, native fish re-introduction and habitat restoration, demonstrating effective approaches and partnership. We'll showcase the Upper Deschutes Partnership

for Habitat Restoration, hearing from those who helped make it happen. Participants will travel to Camp Polk Meadow Preserve on Whychus Creek (spawning habitat for steelhead) for a first hand look at a restoration project, followed by a stop at the headwaters source springs of the Metolius River and the Johnson Cabin to hear more about water and fisheries issues in the basin. Please wear comfortable shoes or boots and dress for the weather. You'll be walking along stream beds and meadows.

Organized by Mary Krenowicz, The Samuel S. Johnson Foundation; Jody Ward, Donor Advisor, The Oregon Community Foundation

Sponsored by the Samuel S. Johnson Foundation

OUR FORESTS AT RISK: HOW LOCAL COMMUNITIES COPE

Speakers: **Brad Chalfant, Deschutes Land Trust**
Bill Anthony, Sisters Ranger District
Chip Dale, Oregon Department of Fish and Wildlife
Amanda Egertson, Deschutes Land Trust
Darin Stringer, Integrated Resource Management

The future of Oregon's public timberlands and private forest landscape is a subject that has economic, environmental and cultural impacts on the state and those that live here. Learn why protecting and promoting old-growth ponderosa pine forest conditions is vital to a basin and its people. Discuss the changing ownership of timberlands and the ecological threats, as well as what managing lands in perpetuity actually means. See how the forest is being cared for, the philosophy behind the treatments and "new" forestry practices. Participants will travel to the Johnson Cabin at the Headwaters of the Metolius River and then to the Metolius Preserve. Please wear comfortable shoes or boots and dress for the weather. You'll walk the Headwaters, the Becky Johnson Nature Trail and explore the Metolius Preserve .

Organized by Laurel Francis, Kirby Foundation; Mary Krenowicz, The Samuel S. Johnson Foundation

Sponsored by Francis, Hansen & Martin, LLP

TRANSFORMING A COMMUNITY FROM TIMBER TO TEXTILES

Speakers: **Bill Mintiens—History of Sisters, Sisters Economic Development**
John Rahm—Visioning in Sisters, Sisters Community Trails
Jerry Norquist—Cycling in Sisters, Cycle Oregon,
Tate Metcalf—Good community health, Sisters Athletic Club
Lisa Clausen—New pioneers, Sisters Movie House
Carrie Ward, Sisters Organization for Activities and Recreation
Dan Saraceno, Heart of Oregon Corps
Rossy Gomez-Pullig, Saving Grace



Jeri Fouts, Sisters Schools Foundation
Jean Wells, Stitching Post, Sisters Outdoor Quilt Show
Kathy Deggendorfer, The Roundhouse Foundation
Susan Arends, Sisters Schools Foundation

This bike tour “site visit on wheels” will bring to life for funders examples of economic growth and diversity, affordable housing, human services, vital schools and libraries. You’ll hear how funders can contribute to encouraging creative solutions to community challenges and stabilizing rural economies. Along the three-mile route you’ll meet key community leaders and entrepreneurs—those folks who are helping to create the future for Sisters and the people who call this home. This is an active exploration! Lunch is at Three Creeks Brewery, followed by a trip to three locations in town for interactive dialog, then return to the Brewery for a final discussion with funders who have participated in similar transformational grantmaking. You’ll be on a bike during this tour of the Sisters community! There will be alternative transportation available for those who request it or if weather is a factor.

Organized by Bill Willitts, FivePine Lodge; Susan Schneider, The Oregon Community Foundation
Sponsored by Cosgrave Vergeer Kester LLP

QUALITY OF PLACE—THE ARTS AND A VITAL AND HEALTHY LOCAL ECONOMY

Speakers: Kathy Deggendorfer, The Roundhouse Foundation
Kit Stafford, Arts Educator
Ellen Stein, Sisters City Manager
Cate O’Hagan, Arts Central
Paul Bennett, Artist
Brad Tisdell, Sisters Folk Festival
Katie Yoder, Sisters Folk Festival

On this off site, we’ll see how a vital community embraces the creativity of those who live there, how a community can capitalize on its natural and built resources and generate interest by what’s happening in the area. It’s all about quality of place. We’ll start at the Sisters Art Works, an innovative building that combines for-profit and non-profit entities focused on the arts and health. Local arts advocates will share their stories of a community held vision for the future built on a creative economy. That means art in the lives of children as well as support for the working artists. We’ll visit Caldera—a place that combines the natural environment and art to create healthy kids and support working artists. You’ll even see how art can be used to build community. Wear comfortable clothes and be willing to play!

Organized by Kit Stafford, Arts Educator; Laurel Francis, Kirby Foundation
Sponsored by The Roundhouse Foundation

GRANTMAKERS COME TO THE TABLE: SUSTAINABLE AGRICULTURE AND SAFE FOODS

Speakers: Victor De Luca, Jessie Noyes Smith Foundation
Sharon Thornberry, Oregon Food Bank
Deborah Kane, Ecotrust
Dan and Jeanne Carver, Imperial Stock Ranch

Two years ago, only a handful of people were talking about sustainable agriculture and safe food. All that has changed and today, terms like organic, certified, free range, omnivore and locavore are part of every day language. The topic of food and food systems is both personal and global and our speakers have been chosen because of their local, regional and national perspectives. Participants will hear about key issues, beginning with an understanding of what all these terms mean and where funders can make a difference. We'll look to one of the leading national foundations in sustainable agriculture for best practices and locally to issues of access to food in our own communities. This group won't have to bike or hike, but you will be fed well in an appetizing location!

Sponsored by Kaiser Permanente Northwest

7:00–9:00 pm | THURSDAY DINNER

The New World of American Philanthropy

Speaker: Susan Raymond, PhD

Susan Raymond is Executive Vice President of Changing our World and Chief Analyst for onPhilanthropy.com. She is the author of several books on philanthropy, including *Mapping the New World of American Philanthropy: Causes and Consequences of the transfer of Wealth*. In addition to her experience, connections, and progressive view of the future of philanthropy, Susan ties the importance and heart of nonprofit work back to place and community. She is a provocative, dynamic, experienced and engaging speaker.

Reception sponsored by Ferguson Wellman Capital Management

Dinner sponsored by The Oregon Community Foundation

WHAT MAKES FIVEPINE GREEN?

- FivePine was built using sustainable development practices. Buildings were sited to reduce tree loss.
- Your cottage hot water is supplied by computer driven tank-less Takagi technology. Allow 60 seconds for limitless hot water that results in a 50% energy savings.
- Your room is heated and cooled using heat pump collectors.
- Your room is lighted with compact fluorescent lighting.
- Your room was painted with Pittsburg low VOC paint.
- Your windows are Jeld-wen Low-E wood casement energy efficient windows.
- Your room is kept sparkling clean with Orange2 toxin free cleaning solutions.
- You can do your part to aid us in our quest to be Oregon's most environmentally friendly property by re-using towels. If you would like new towels, please place old ones on the floor.
- Towels on the rack will be left for re-use.
- No Bottled Water
- Aquifers running from the Cascade Mountains flow into two community deep wells that provide water to FivePine. Enjoy drinking some of the purest water in the world.



Friday, October 17, 2008

7:30–9:00 am | FRIDAY BREAKFAST

What did we learn yesterday?

Moderator: Carole Morse, PGE Foundation

Conference participants will be given an opportunity to share what they learned on the Thursday afternoon off site visits. A roving microphone and a slide presentation of photographs taken on Thursday will let participants “see” each of the five off site sessions.

Sponsored by The Lemelson Foundation

9:30 am–12:00 pm | WORKSHOP

Leadership and Management in Nonprofit Organizations

Speaker: Daniel Stid, Bridgespan

Daniel Stid, a Partner with The Bridgespan Group in San Francisco, will use an experiential learning format to explore the current leadership and management realities facing nonprofit organizations. Nonprofits are under increasing pressure to step up their management capabilities. Yet for many nonprofit leaders, doing so can be very difficult. They are being challenged to answer two key questions: “What impact are we prepared to be held accountable for?” and “What do we need to do—and not do—in order to achieve this impact?” The group will look at how nonprofits answer these questions and make successful transitions to stronger management as well as the role of funders in the process.

Sponsored by Meyer Memorial Trust

12:00–1:30 pm | CLOSING LUNCH PLENARY

Speaker: Victor De Luca, President, Jessie Smith Noyes Foundation

Victor De Luca joined the Jessie Noyes Smith Foundation, based in New York city, in 1991 as a program officer and became its president in 2000. In his eight years of leadership, Vic has helped create a philanthropic organization that has modified its grantmaking program over six decades to assure relevance in contemporary society and to a sustainable future while maintaining its founder’s values. Vic will share stories of how his Foundation has evolved and how other funders—large and small, old and new—can use all of their assets creatively to build healthy communities and a sustainable future.

Sponsored by Meyer Memorial Trust

Registration Form

Registration is available online at www.gosw.org/grant/makers/info/registration.

Eligibility to attend: Conference registration is open to all members of GRANTMAKERS of Oregon and Southwest Washington. Non-member registration is open to representatives of organizations whose principal purpose is responsive grantmaking and who are eligible to become members of GRANTMAKERS of Oregon and Southwest Washington. This event is not open to the general public, nor is it appropriate for grantseekers. If you are unsure about your eligibility to attend, please email info@gosw.org.

Register early to guarantee your attendance! Return completed registration form and payment by September 26 to: PO Box 6381, Portland, Oregon 97228-6381, register by email at register@gosw.org or by fax 503.228.5840. **Please complete a separate form for each member of your organization attending the conference.**

Organization _____

Address _____ City/State /Zip _____

First Registrant—Please copy this form for each additional registrant

Name _____

Title _____ Email _____

Note any needed accommodations here (dietary, mobility, etc.) _____

Please contact me about group transportation to (Wednesday AM) and from (Friday PM) the conference.

Offsite Preference (please rank in order of preference from 1–5 with 1 being your first choice)

_____ Economic Development and Community Building through Arts and Culture

_____ Peddle to Pub: Transitioning from Timber to Textiles

_____ Sustainable Agriculture

_____ Our Forests at Risk: How Local Communities Cope

_____ Water Resources and Fish

Table Topic Suggestions for Thursday Morning Plenary _____

Rate	Amount	# of Participants	Total
Member Rate (1st registrant)	\$250		
Additional Members	\$225		
Nonmembers	\$350		
First-Timers (those who have never attended a GRANTMAKERS event)	\$325		
Complimentary Registration per Sponsorship Benefits	N/A		
Total Payment			

Check enclosed *–or–* Bill me: By mail By email Via PayPal (facilitates the use of a credit card)

Please make checks payable to GRANTMAKERS of Oregon and Southwest Washington.

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Please see accomodation options at : www.gosw.org/grant/makers/info/accomodations

For directions: www.gosw.org/grant/makers/info/directions_to_fivepine

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