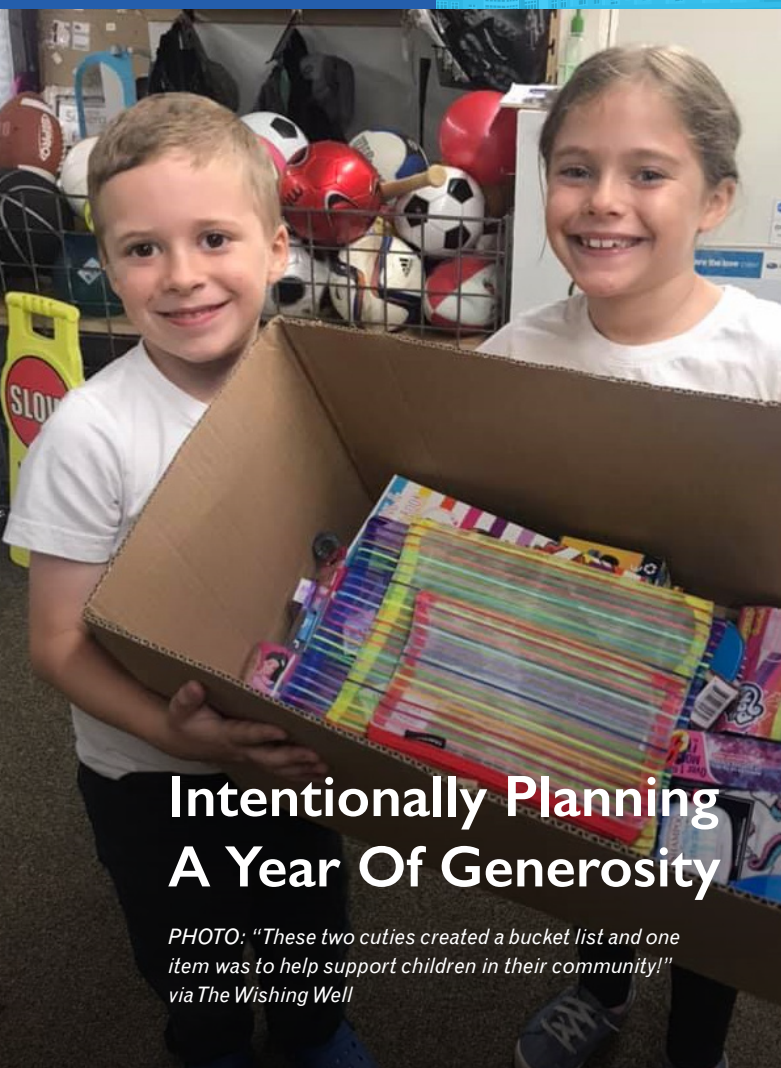


Community Voices, Community Connections



Intentionally Planning A Year Of Generosity

PHOTO: "These two cuties created a bucket list and one item was to help support children in their community!"
via The Wishing Well

There are currently four generations and more than fifteen family members engaged in the Nist Family's philanthropy. Thanks to a well-defined giving strategy, one of the family's youngest members guided the family's annual giving.

"In the end, he helped us all recognize the organization that was most closely aligned with our mission."

"We want to support so many different organizations," Jeannie Nist identified the challenge the family faced to keep everyone united, on track, working, and moving in the same direction. To guide their philanthropy, the Nist family developed a mission statement: 'To support and sustain vibrant and healthy communities in the greater Puget Sound region. To accomplish its purpose, the fund invests in strong, community-based organizations that provide resources and services to families in our community that enhance their quality of life.'

"Creating our mission statement has helped us to be intentional about narrowing down a very broad list," Jeannie said. "It has been helpful to have something to be our north star in terms of what we're trying to support. This strategy led us to invite our youngest family members to participate in our site visits."

On a site visit to [The Wishing Well Foundation](#), Jeannie Nist's then 10-year-old son recognized the organization understood what kids want and need. He saw they offered foster kids the kind of clothing that matters to kids – things like Seahawks gear for Blue Fridays and Halloween costumes. Jeannie remembered, "In the end, he helped us all recognize the organization that was most closely aligned with our mission."

The Nist family's intentional planning is not common. Brad Berger, Financial Advisor and Chief Executive Officer at [Cornerstone Financial Strategies](#), has noticed the decision to give to a nonprofit is often made hurriedly at the end of the year as people combine their impulse to give with a desire to generate a tax benefit. After thirty years as an advisor, Brad recommends that giving decisions be given careful consideration, ideally long before a nonprofit makes an ask for a contribution.

"Often the gifts that have the greatest impact, regardless of size, are the ones that funders thoughtfully plan in partnership with us."



Members of the Nist Family: Jeannie, Mike and Sylvia

Maureen Sorenson, [Amara's](#) Chief Community Officer, agreed with Brad, sharing this perspective on the power of a well-timed gift, "The trauma experienced by a child entering foster care is often unanticipated and unplanned. At Amara, well-timed gifts provide our emergency sanctuary staff with the flexibility to be present in the moment and meet each child's unique needs."

Maureen has noticed the most transformational investments in Amara's work are not always the largest, "Often the gifts that have the greatest impact, regardless of size, are the ones that funders thoughtfully plan in partnership with us, keeping the children's needs at the center of the relationship."

Although planning charitable giving is not always a common practice, Jeannie's cousin, Sylvia, encourages people to dedicate time and energy early in the year to think about making focused gifts that align their goals and their values. The Nist family was motivated to teach their next generation that giving back to the community goes hand in hand with a successful family business. The compelling advocacy of Jeannie's 10-year old son shows how intentional planning can pay off for family and the community.

Here are a few ways to intentionally plan a year of generosity:

- Engage in a value exercise
[Inspired Philanthropy – Vision & Values Exercise](#)
- Develop a mission statement
[Inspired Philanthropy – Writing Your Mission Statement](#)
- Talk to other individuals, families and foundations already doing good work
- Be clear about how you're going to make decisions
[Inspired Philanthropy – Making Choices](#)
- Set an annual budget for charitable giving
[Forbes – You Should Budget For Charitable Giving Even If You Aren't Rich](#)
- Identify the organizations that best align with your mission
[Greater Tacoma Community Foundation Nonprofit Directory](#)
- Make a giving plan
[New York Times – How to Make a Personal Giving Plan](#)
- Make gifts early in the year to give nonprofits more flexibility in planning and achieving their mission throughout the year
[Giving Compass – Giving Planner](#)

For more information on these tools or for help planning your giving, contact GTCF's Philanthropy Team



20 Minutes Can Make All The Difference For Students In Expanded Learning

When school lets out at Tacoma's Birney Elementary, Sergio Beltran can be found outside the cafeteria greeting students as they head into Expanded Learning at the [All-Star Center](#). On a recent Thursday, Sergio noticed one student looked a little down as he entered the space. Sergio took a few minutes right away to talk one-on-one with the student.

Using a tool called the [Zones of Regulation](#), Sergio helped the student identify his feelings. "He wasn't able to explain why at first," said Sergio, "but he definitely knew he was in the Red Zone." That zone indicates intense emotions like anger or rage.

"I think it really shifts the young people's energy when we create a warm and welcoming environment and let them know there are adults here who care about them..."

Sergio asked questions designed to help the youth explore what experiences led to his feelings. Once they figured that out, Sergio encouraged the student brainstorm ways he could begin moving closer to the Green Zone, where emotions are more calm. After the exchange, the student visibly calmed down. When Sergio checked in on the student later, he was all smiles.

As the Allstar Center's Site Director, a big part of Sergio's role is providing support for students to have a seamless transition in the 20 minutes between the school day and after-school Expanded Learning Opportunities (ELO).

Greeting each student warmly and providing an opportunity for them to check in and share how they are feeling is key for Sergio, "I think it really shifts the young people's energy when we create a warm and welcoming environment and let them know that there are adults here who care about them and are willing to listen to them and help with whatever they may be going through."

"We're all serving the same students so it makes sense for us to sit down together and talk about what we're seeing and how we can work together to support them."

Another way Sergio creates a smooth transition for students is using language and practices that are consistent with what students' teachers use, "I talk regularly with the principal, Ronel Balatbat, and go to classrooms to observe teachers to see how they are doing their Zones check-ins and community circles so we can create something here that feels consistent and familiar for the students."

Venalin Aguilar is the Site Director at [Fawcett Elementary's Falcon Center](#). Like Sergio, she collaborates with school staff to align language and practices. Venalin also partners with school staff to help her connect students to Expanded Learning Opportunities that would be a good fit for them, "I talked with the school counselor and got recommendations of students who might benefit from some of the mentorship programs we have. As a result of that connection, some of the mentors we have were able to let the counselors know

about other students in their programs who could benefit from connecting with the counselor during the school day. We're all serving the same students so it makes sense for us to sit down together and talk about what we're seeing and how we can work together to support them."

"it's really about ensuring these young people have all the support they need to be the best versions of themselves."

GTCF Senior Program Officer Megan Smedsrud works with Sergio, Venalin, and a team of four other Site Directors to deepen these practices of alignment between adults who work with students, "There are lots of emails, phone calls, and coaching sessions with the ELO providers keeping them in the loop about what is happening at the school sites, how to support students in their group, and how to be intentional about incorporating social-emotional learning practices into their program. Creating this type of alignment between adults who work with kids is really the heart of what the Whole Child partnership is about."

Back at Birney on that recent Thursday, parents arrived to pick up their students at the end of the program day. Sergio made sure to connect with one more important adult. He talked with the mother of the student he had helped earlier. Sergio let her know what her son had shared and how they had talked through it together. The mother shared that they



had been working on things at home as well. The two adults agreed to keep in conversation about how to best support the student together.

Whether it's communicating with the principal, teachers, or parents, Sergio says, "it's really about ensuring these young people have all the support they need to be the best versions of themselves."



Move Beyond The Overhead Myth To Giving For Impact



The end of the calendar year is a time when charitable giving is in the spotlight. Just as there are myths associated with many year-end cultural celebrations, there are also myths associated with philanthropy.

Some ideas about charitable giving are rooted in well-meaning, but incorrect assumptions about nonprofits. Other myths are holdovers from outdated approaches to philanthropy. Perhaps the biggest myth, the one you'll see challenged in most every article on giving myths, is the myth of overhead.

consider not just overhead, but “transparency, governance, leadership and results”

In his new book, [“Giving Done Right”](#), Phil Buchanan offers practical tips and strategies for givers at all levels. Phil has served as the President of the Center for Effective Philanthropy for the past two decades. He also uses lessons learned from some of the biggest givers to bust the idea that an organization's overhead costs are an obstacle to real community impact.

For decades, donors were advised to ask this question, “How much of the donation will go to the cause and how much will go to overhead?” This is Phil's response:

It's a question that comes from a good place – no one wants their money wasted. But it's the wrong question. It's like judging a baseball team by their uniforms rather than their wins and losses. What matters are results. To achieve results, nonprofits need flexible support that allows them to make investments in getting better – in technology, performance management systems, or professional development, for example. They should make these investments regardless of whether those budget items are considered to be for “overhead” on the one hand or for the “program” or “cause” on the other. With few exceptions, it all goes to support the cause.

Buchanan goes on to encourage givers to get clear on their goals, find strategies that are likely to lead to progress towards those goals and then identify strong organizations doing

effective work that aligns with your goals and strategies. Once that work has been done, give those organizations the kind of flexible support they desperately need.

Phil's not alone. The leaders of GuideStar and Charity Navigator [wrote an open letter to donors](#) reinforcing this approach, asking givers to consider not just overhead, but “transparency, governance, leadership and results.”

The impact you'll have is no myth, it's a very real act of positive transformation.

Major funders, including GTCF and many of the largest foundations in the country, have also recognized the importance of fully funding organizations with an eye on community impact and an understanding about the real cost to effectively fulfill nonprofit missions.

Darren Walker, CEO, Ford Foundation [put it this way](#):

We must trust those we fund, and fund them adequately to do what they believe is best, not what we think is best. This means putting ourselves in the shoes of prospective grantees and communities, treating them like partners rather than contractors, and entrusting organizations with long-term general support funding and project grants that provide adequate overhead. It means acknowledging the power imbalance that often makes our grantees reluctant to engage honestly and authentically.

Engaging in philanthropy has the power to change our community and our world for the better. Whether you are a major donor or a modest contributor, lean into those nonprofits that align with your vision by making an unrestricted gift. Your gift allows them to deliver on their unique mission. The impact you'll have is no myth, it's a very real act of positive transformation.

To learn more about achieving lasting community impact through your philanthropy, [contact GTCF's Philanthropy Department.](#)



GTCF Youth Philanthropy Board Engages In Dialogue Many Adults Won't

Racial differences split GTCF's Youth Philanthropy Board (YPB) in two at a recent meeting. It wasn't a rift in the group. Breaking into discussion groups according to racial identity was part of a facilitated exercise to support deeper reflection about how racism shows up in our community.

"Noticing how I don't have the same opportunities all of the time as my white peers is a bit concerning, so having these discussions is important."

"Everyone had a piece of the puzzle on how to create conversations and dialogue," Jennifer Arnold of Reciprocity Consultants explained. For the past year, GTCF has partnered with Jennifer to develop and enhance the YPB curriculum. Jennifer invited Julia Kagochi of Kagochi Consulting to guide YPB members in dialogue reflecting on their identity and experiences, with respect to diversity, equity, and inclusion in Pierce County. Julia used inquiry and feedback from previous sessions to create challenging conversations.

"You have to be vulnerable to talk about this stuff."

Members separated into caucuses, also called affinity groups. One group was YPB members who identify as people of color, one group was members who identify as white. Members spoke openly in their caucus groups about their lived experiences with racism. Then, members brought their stories, challenges, and ideas back to the entire group for further discussion. "I think the youth engaged beautifully," Jennifer reflected after the session.

Charles, a 1st-year YPB member shared his perspective, "My mom is white, and my dad is black. Noticing how I don't have the same opportunities all of the time as my white peers is a bit concerning, so having these discussions is important. You have to be vulnerable to talk about this stuff."

Zayda, a 2nd-year YPB member who identifies as African-American, agreed that having open and honest dialogue paves the way for greater connection, "I like to sit and talk and understand where people come from. It is important for us to sit down and understand what we used to be, what is changing now, and how we can change that for the better."

"I feel like people are afraid to talk about racism or just any of the 'isms' in general."

"I'm white myself, my entire family is white, I grew up in a very white neighborhood, and I went to all white schools until I got to Jason Lee, which was very diverse," explains Maeve, a 1st-year YPB member. "It is important to know about other cultures, and other people and how we relate, how we differ, and how that is important to everyday life. It's

good for world view."

Census data indicates that in 2020 the 18-and-under population in the United States will be majority people of color. In less than a decade, adults under 30 will be majority people of color. By 2045, it is projected that the United States will become 'majority-minority', where the majority of the population will be non-white.

"I'm going to use what I learned to educate people around me about their privilege."

While many people, organizations, and businesses in Pierce County value an equitable, diverse community, these demographic shifts point to the need for more intentional and ongoing conversation. Dialogues about racism can help foster empathy, understanding, shared commitment, and accountability for ending racism and inequities for a more thriving Pierce County now and into the future.

Zayda encountered challenges last year while working with children as an Americorps volunteer, "I would have a really hard time battling the obstacles of working under the DEI lens with the kids while trying to include equity. It's hard to always advocate for youth when the people who are working with youth don't want to hear what they have to say. I feel like people are afraid to talk about racism or just any of the 'isms' in general."

Maeve plans to initiate more conversations like this, "I'm

going to use what I learned to educate people around me about their privilege. I believe that education is important to developing schools and developing opportunities in lower-income neighborhoods."



The facilitated caucus exercise Youth Philanthropy Board members participated in is a common tool for diversity, equity, and inclusion education.

Contact GTCF's Community Impact team to get connected with additional racial equity resources.



An Opportunity For Impact Arrives At Age 72



A GTCF fundholder said, “A lightbulb went off!”, when he discovered a sometimes-overlooked opportunity to support a thriving community available after age 72.

It isn't traditionally seen as a milestone birthday, but age 72 can be reason to celebrate. That's when Individual Retirement Account (IRA) holders must begin taking minimum withdrawals annually, known as a Required Minimum Distribution (RMD).

The RMD was a “taxable event” for this GTCF fundholder. IRA contributions that were tax-deferred when they were made are treated as ordinary income and subject to taxes as distributions. However, the RMD also offered this fundholder an opportunity to make a tax-efficient philanthropic impact for the community.

Any RMD amount, up to \$100,000, can be designated as a Qualified Charitable Distribution (QCD). The funds go directly to an eligible charity, bypassing the owner of the account, and not counting as income for tax purposes.

Speaking anonymously, the fundholder found the opportunity to turn their RMD into a QCD put the situation in a whole new light, “We'd been taking the distribution

and paying taxes accordingly for the last few years and hadn't thought about it that carefully. GTCF urged us to consider a different scenario and it was a great idea for us.”

Stacey Guadnola, GTCF Director of Philanthropic Engagement, asked this fundholder, “What's the change you want to see?” Together, they identified several local 501(c)3 organizations to receive grants through a QCD. Stacey added, “In an ideal world, there is a blinking light on age 72: You have this new opportunity to make an impact in your community.”

With the counsel of their Certified Public Accountant (CPA), Frost & Company, PLLC, the fundholder placed a \$100,000 QCD in a designated fund at GTCF. A QCD cannot go into a Donor Advised Fund under current rules.

The Frost & Company CPA shared, “Turning your RMD into a QCD is a fairly simple strategy to make your charitable giving most tax-efficient.” Many people end up writing philanthropic checks after paying taxes on their entire RMD, simply because they aren't aware of the opportunity.

The CPA explained that the QCD is not included in gross income and cannot be taken as a deduction, making the RMD-to-QCD strategy best for people who “are charitably inclined, don't need all of their RMD to live on, and who are not itemizing deductions. If you do make a QCD, be sure to save your paperwork and submit it to your tax adviser so that it is correctly listed on your tax return.”

One of the recipients of the anonymous GTCF fundholder's QCD was the Tacoma Rescue Mission. Duke Paulson, Executive Director, shared the difference this particular grant will have on our community, “This gift helps us to more than double the shelter space for homeless women in Pierce County!”

Having discovered the opportunity their RMD offers, GTCF's anonymous fundholder has already earmarked another QCD for 2020, “Why wait? Why not work with GTCF in the early part of the year to put your money to work in a thoughtful manner when nonprofits can use it most, rather than pressuring yourself to make a decision at the end of the year?”

GTCF can assist with philanthropic contributions for community impact. Whether it's a Qualified Charitable Distribution, a philanthropic fund, or even a donation directly to an organization, contact GTCF's Philanthropy Team to get advice on how your gift can do the most good.



Census 2020 Outreach Depends On Community Connections

For the past year, Chris Jordan and his team at [Fab-5](#) have been inviting youth, neighbors, and elders of the Tacoma Hilltop community to shape the development of new affordable housing units, and new community, commercial, and retail space along the Martin Luther King, Jr. Way corridor. Chris Jordan is co-Director of [Fab-5](#), a nonprofit that advocates with and supports local youth to gather, connect, and create positive futures for themselves and their community.

In the coming months, Chris plans to incorporate conversations and information about 2020 Census into upcoming sessions of these [#DESIGNTHEHILL](#) gatherings, “The design labs we’ll do around Hilltop and its future with this Census outreach will provide an opportunity to think about the long-term future of the neighborhood in very concrete ways.”

“These organizations are experts at reaching their networks and so our goal is to support them in doing more of what they already do incredibly well.”

Fab-5 is one of 39 organizations receiving funding for Census outreach through GTCF, thanks to a grant from the State of Washington Office of Financial Management. As part of the grants, more than 90 leaders representing tribes

local governments, organizations, associations, coalitions, and collaborative networks gathered together as a cohort on December 5, 2019 to deepen connections and share ideas for Census outreach and engagement in hard-to-count communities.

Ariele Belo of [Hearing Speech & Deaf Center](#) was another grant recipient at the event. Her organization’s outreach strategy includes developing an ASL video that will highlight the importance of the Census, show what the form looks like, and explain how to fill it out. Belo says that ASL is the primary language for many of the community members they connect with regularly, so written English is often difficult for them to understand, “We meet with a lot of deaf people who say that when they see a bunch of printed materials come in, they often throw it away because it’s difficult to read and understand. We don’t want them to toss it, so we want to educate them about what it is before it gets there.”

Another grant recipient was the Cowlitz Indian Tribe. They operate multiple offices along the I-5 corridor where they administer a number of health and human services programs for their own members, as well as members of other American Indian and Alaska Native communities. The Tribe plans to help spread the word about the 2020 Census by setting up booths at Pow-Wows, holiday

art fairs, and cultural events hosted by them and other tribes or tribal organizations. Tribal employees in various departments and programs are being briefed on the Census so that they can include outreach and education in their ongoing work. Posters and information sheets are being provided in all the Tribal offices, and the Tribe is working with their payroll department to have a Census information sheet included with checks that go out to all the Tribal employees as well.

The 2020 Census is a once-in-a-decade opportunity to inform data that directly affects everyone in Pierce County. Census data guides how more than \$800 billion a year in federal funding is distributed, helping to create jobs, provide housing and build schools, roads and hospitals. An accurate count is critical to Pierce County's ability to access public and private resources and to ensure residents have adequate government representation.

"The strategies that will be necessary to reach our hardest-to-count people are also the strategies that are necessary to better engage our community in shaping its future."

Historically, important communities including immigrants, people of color, and young children have been undercounted in the census. The 2020 Census Community Grants process was designed to elevate, center, and enhance current and new relationships among hard-to-count communities.

"By funding organizations with trusted relationships to do more of what they're already doing, they can be the most creative and effective in reaching their networks without taking on extra work that makes it harder for them to achieve their mission. Community-based organizations know best the activities and strategies that reach the members of their communities. These organizations are experts at reaching their networks and so our goal is to support them in doing more of what they already do incredibly well," said Seth Kirby, GTCF's VP of Community Impact.



The gathering was the first in a series of three collaborative sessions for recipients of GTCF's 2020 Census Community Grants. Over the next several months, the census cohort will continue to meet, sharing out their ideas and strategies. Seth Kirby said, "Our philosophy is that we are stronger together, so we wanted to get everyone together right away so that leaders are connected with other organizations doing work. This network has already become a place to share ideas and solutions that meet the unique concerns of hard-to-count communities."

For Fab-5's Chris Jordan, the Census work isn't a new project; it's another opportunity to deepen relationships and continue his organization's mission, "The strategies that will be necessary to reach our hardest-to-count people are also the strategies that are necessary to better engage our community in shaping its future. I'm excited about the opportunity to strengthen our partnerships and improve the civic infrastructure of our city to better serve our young people and their families."

To find out more about Census Community Grants contact GTCF's Community Impact team.

Upcoming Fundraisers

February 22, No Place Like Home Dinner & Auction – Rebuilding Together South Sound

February 27, Legacy of Hope: Celebrating Our Youth of the Year – Boys & Girls Clubs of South Puget Sound

March 4, Because Parks Matter Luncheon – Greater Metro Parks Foundation

March 12, RAGS Wearable Art Sale & Gallery Show – YWCA of Pierce County

March 25, Lunch & Laughter – Community Health Care

March 27, Level Up! Learners to Leaders – Peace Community Center