



# Community Voices, Community Connections

## Working Together, Tacoma Organizations Remove Barriers To Expanded Learning Opportunities

When the bell rings at the end of the day at Tacoma Public School's DeLong Elementary, some students head home with their parents, some get on the bus, and some of them go to Dragon's Club. Dragon's Club is an after-school program that provides Expanded Learning Opportunities (ELO) like dance, art, and mentorship. Located in the DeLong cafeteria, students just walk down the hall to get to the Dragon's Club.

*"This year, Tacoma Public Schools, Greater Tacoma Community Foundation, The Wallace Foundation, and Metro Parks Tacoma have braided multiple funding streams to help address student needs"*

DeLong is one of 22 Tacoma Public School now providing on-site access to Expanded Learning Opportunities.

Greater Tacoma Community Foundation, Tacoma Public Schools, and numerous community partners have been working together with funding through The Wallace Foundation's **Partnership for Social Emotional Learning Initiative** to provide aligned, equitable, high quality social, emotional, and academic development opportunities to students in and out of school at 12 sites. Metro Parks is providing Expanded Learning Opportunities at **10 additional elementary school sites**.

Having these kinds of opportunities available to students on-site at their school is a step that Elvin Bucu, Director of Systems Alignment at **Graduate Tacoma**, identifies as key to addressing issues of equity in education. "Many of our students live in communities that have been historically marginalized, resulting in multiple barriers in the way of those students wishing to participate in Expanded





Learning Opportunities. Specifically in my experience, transportation and cost represent two of the most significant barriers. Efforts to bring ELO programs directly to the schools and communities where these students live helps address these barriers.”

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Providing free programs at school sites helps maximize the number of students who can participate in Expanded Learning Opportunities, but there are still challenges that need to be overcome in order to make it happen. With students staying after school for an additional two hours, they need to eat. Many students also need a way to get back home afterward.

This year, **Tacoma Public Schools, Greater Tacoma Community Foundation, The Wallace Foundation, and Metro Parks Tacoma** have braided multiple funding streams to help address student needs by providing snacks for every student as well as buses to transport students back home. “None of us could do

this alone,” said Fahren Johnson, GTCF Senior Program Director, “but with all of us partnering together we have been able to find a way to make it work and make sure we are meeting the needs of students and parents who want to participate.”

Helping increase the number of school sites where on-site ELO programs are offered this year is funding from **Tacoma Creates**. Tacoma Creates is the voter-approved initiative to increase access to arts, culture, heritage, and science experiences throughout Tacoma by reducing barriers to access and expanding offerings. “There’s a really strong focus on supporting programming that happens in neighborhoods across Tacoma,” said Lisa Jaret, Tacoma Creates Program Manager. “Schools are obviously situated within every neighborhood in Tacoma, so increasing opportunities for organizations to provide programming in schools directly impacts neighborhoods.”

Partnerships across Tacoma organizations are fueling a giant leap in expanded learning opportunities. Success means that students only have to take a few small steps to access it.



# S O C I A L L Y R E S P O N S I B L E I N V E S T I N G

## GTCF's Socially Responsible Investment Fund Hits Market Sweet Spot

Over the last three years, GTCF's Socially Responsible Investment (SRI) Fund has outperformed its endowment fund by 1%. GTCF CFO, Mo Mousa, pleased with the SRI fund's performance since its introduction in 2016, likes to think of SRI as, "Doing well while doing good."

With specific regard to "doing well," Mousa offers this: "A look at second quarter returns between our SRI fund and the endowment pool (which was started in 1999), shows a 2.2 return for both. Year to date, the endowment fund gains are at 10.9% and the SRI gained 12.4%."

Unpacking the "why" behind that performance, **Fund Evaluation Group's** Tim O'Donnell, who manages GTCF's SRI fund, says values-based investment strategies have become more sophisticated over the past 20 years. "Prior investors were a bit too complacent with high fees and low returns," he says. "They were strictly values-focused, relying heavily on the exclusion of sin stocks (tobacco, firearms, weapons, etc.)." He calls that strategy, "a cudgel when you needed a scalpel."

**Certified Financial Planner** and GTCF Investment Committee Chair, Gary Brooks explains that while the surge in the creation of values-based funds—GTCF's included—may be fueled by heightened social conscience, SRI investing is in a "sweet spot" right now in the marketplace. "SRI funds are more likely to be light on energy, industrials, and other 'values stocks,' which have, over the last several years, performed worst in the market. SRI focuses on innovation-oriented 'growth stocks' such as tech and healthcare, so they are doing well just by virtue of where they're invested."

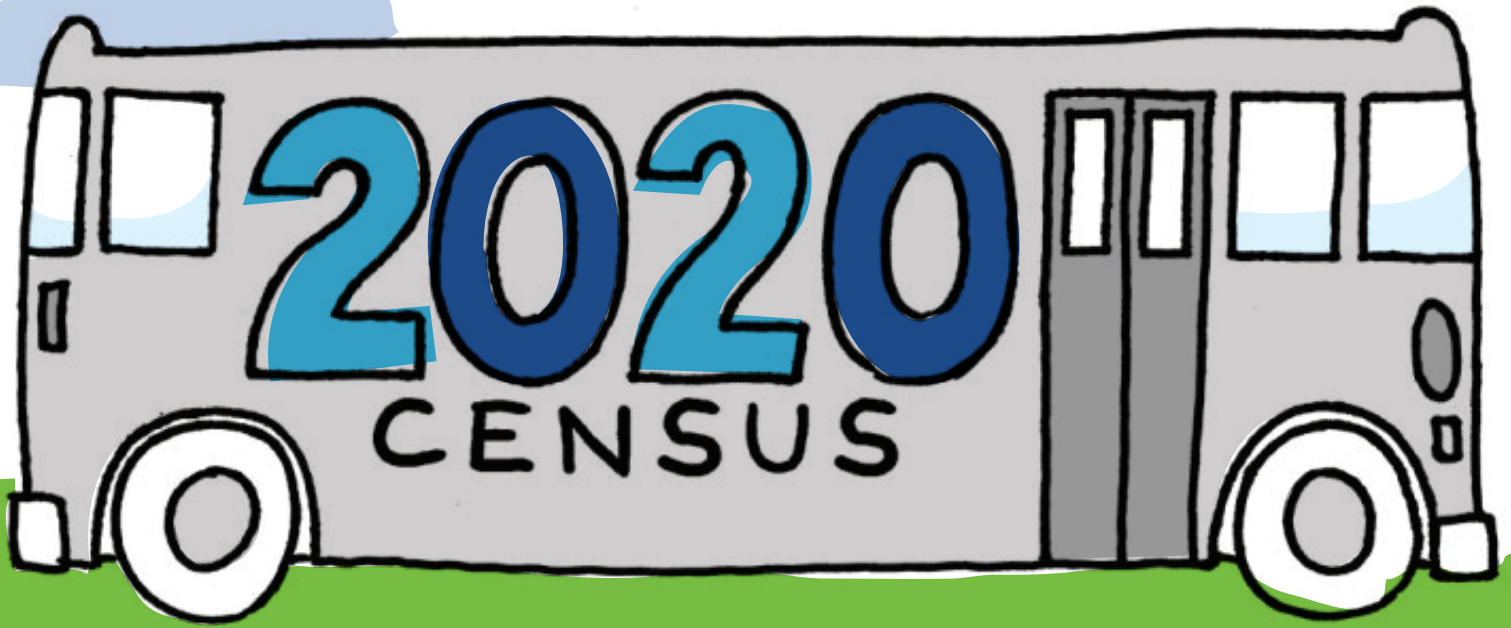
GTCF's SRI fund employs screens for environmental, social and company governance factors (ESG), which are part of today's more holistic SRI strategy. For example, GTCF's fund managers proactively evaluate the degree to which companies embrace green building and clean technology practices, are engaged in human rights advocacy, positive labor relations and workplace safety, exhibit board diversity, and limit executive compensation.

Today's SRI investors, O'Donnell says, "can get returns that are comparable to the overall marketplace and invested in a relatively high ethical manner. Saving the world is a fabulous ancillary benefit to this type of portfolio."

Indeed, their alignment with GTCF's philanthropic work is part of why GTCF Senior Director of Philanthropic Services Evelyn Ryberg says she enjoys working with fundholders to establish values-based portfolios. But, she says, SRI is not the "lead" in those discussions: "We spend a lot of time discovering what fundholders charitable goals are and what they're trying to accomplish. Once we've identified a pathway, the SRI fund is an option to invest those dollars."

O'Donnell concludes, "All of these discussions are not exclusive to investing in SRI/ESG. They are exclusive to investing. Period. Know what you own and don't own. And why. Know what your portfolio looks like when things are bad, and when they're good. And why. Recognize that SRI is a common-sense approach through which your values can be reflected in your portfolio and that you don't have to give up returns."





## “Fill Out The D@?? Form”, And Other Ways Pierce County Groups Are Raising Awareness Of The 2020 Census

The Tacoma Urban League **website offers T-shirts and sweatshirts** with the phrase “Fill Out the D@?? Form” emblazoned on the front. It’s one of the many ways the Black Caucus is raising awareness about the importance of responding to the U.S. census by April 1, 2020.

The catch-phrase, “Fill Out the D@?? Form”, came out of a meeting of the 2020 Census Black Caucus. Members talked about memorable ways to get people’s attention about the importance of responding to the census. The no-nonsense statement fit the bill.

The 2020 Census Black Caucus formed as part of **Pierce County’s Complete Count committee**, a group of representatives from organizations, networks, and associations throughout the county dedicated to making sure every resident of Pierce County is informed, engaged, and valued in the census process. Many other census sub-committees are forming within communities to identify how the census impacts their members, and to develop messaging that resonates with them.

Historically, certain individuals have been excluded or “undercounted” from the census. In Pierce County,

**hard-to-count communities** include African-Americans, Asian-Pacific Islanders, other communities of color, LGBTQIA individuals, children under age five, post-secondary students, senior citizens, immigrants, refugees, individuals with mental or physical disabilities, individuals with low incomes, and those experiencing homelessness.

*By law, individual census data cannot be shared with other government agencies, including ICE (Immigration and Customs Enforcement). There will be no citizenship question on the 2020 Census.*

In 2010, only 80 percent of Pierce County residents completed the census. “The greatest barrier is distrust of the government,” said T’wina Nobles, President & CEO of the Tacoma Urban League.

That statement is echoed by Lua Pritchard, executive director of the **Asia Pacific Cultural Center**, another member of the Pierce County Complete Count Committee, “Many in our community fear what the information will be

used for and there is also confusion about the citizenship aspect. We're allaying those fears."

By law, individual census data cannot be shared with other government agencies, including ICE (Immigration and Customs Enforcement). There will be no citizenship question on the 2020 Census.

"We have to do mythbusting about the census," said Mark Hernandez, a college senior at Pacific Lutheran University, who is co-leading the outreach effort to college students, along with Musa Abdirahman, a sophomore at University of Puget Sound.

"We'll be reaching out to all post-secondary schools in Pierce County," he said. "We want to educate college students about what the census means, why it's so important to participate, how it affects our community, our neighbors."

*"I came here for college and just fell in love with Tacoma and Pierce County. Now I can help work with other young people to uplift our community."*

**The U.S. Constitution requires that every 10 years, the federal government count everyone living in the United States. Census data is used for a host of purposes, including:**

- + Allocating Congressional seats
- + Federal funding for health care, education, transportation, housing, child care, social service and other programs
- + Demographic research for businesses expanding or locating
- + Local and regional agencies like public transit

The **University of Washington-Tacoma's Center for Applied Urban Research** looked into how census data affects daily life in Pierce County. The video below provides real-life examples of decisions driven by the census, and how an undercount could impact Pierce County.

Another barrier to census participation is language. "The Asia Pacific Cultural Center represents people from 47 different countries and many languages," said Pritchard. "We'll use meetings, events, email, social media and our **website** to get the word out. We'll work with hundreds of local churches in our own languages and cultures."

The Pierce County Auditor's Office offers **comprehensive census information** and communication tools on its website. Materials have been translated and are available in 11 languages.

The census starts April 1, 2020 and a local census office will soon open in downtown Tacoma. The census will be electronic, but there will also be options to use paper forms or complete the form by phone.

The Urban League, Asia Pacific Cultural Center, schools, libraries and other organizations plan to make their own computer labs available for the public to access the census.

"What excites me about this project is it's allowing me to get more involved in Pierce County," said Hernandez. "I came here for college and just fell in love with Tacoma and Pierce County. Now I can help work with other young people to uplift our community."



## 7 Big Ideas From Next Gen Philanthropists

Kristen Corning Bedford compares the evolution of philanthropy to a beehive, “The old model was to woo the queen bee ... the future is wooing the hive.” Her metaphor emphasizes the importance of principles of solidarity, agency, and reciprocity in order for philanthropy to disrupt the status quo and create real change.

*“as next gen donors step into their philanthropic roles...they want to disrupt the traditional world of charitable giving and want to do so now, not after they retire to a life of philanthropic leisure.”*

Author of *A Generous Heart: Changing the World Through Feminist Philanthropy*, and former Vice President of Community Philanthropy at GTCF, Kristen was one of three keynote speakers on Next Generation Philanthropy at the South Sound Philanthropy Summit on September 27, 2019. Hosted by two volunteer-led organizations, **AFP South Sound** and **South Sound Planned Giving Council**, the Summit explored how philanthropy is changing as younger generations bring different styles and perspectives to the work.

Dr. Michael Moody, co-author of *Generation Impact*, shared insights from his research on Gen X and Millennial

philanthropists, who he says will be the most significant donors ever. Based on interviews with rising philanthropists across the country, Michael discovered, “as next gen donors step into their philanthropic roles...they want to disrupt the traditional world of charitable giving and want to do so now, not after they retire to a life of philanthropic leisure.” For organizations who want to partner with this next generation, it’s important to understand how to engage, nurture, and encourage these next gen donors as they reshape giving and community service.

*“When we’re getting involved in these boards and nonprofit organizations we’re looking to our peers and asking what they think, who they’ve worked with and who they know we can trust.”*

Tacoma Urban League President and CEO, T’wina Nobles, spoke to the audience of more than 100 development professionals, allied professionals, professional advisers, and philanthropists. A member of the “next generation” herself, T’wina shared her experiences building authentic relationships with donors. Offering real-life examples of connecting mission and fundraising across generations, she encouraged people to think big and be ready when donors ask for greater engagement with their organizations.

The Summit wrapped up with a panel offering insights from Next Generation philanthropists. Kim Fischer, Senior VP and Wealth Advisor at Wells Fargo Private Bank, shared her lessons from a program that brought different generations

of philanthropic families together. Jordan Beckingham, a 3rd generation member of the Ben B. Cheney Foundation family, talked about carrying on her grandfather's values while learning from more recent philanthropic approaches to supporting community. Eli Taylor, VP and Relationship Manager at Key Private Bank, shared his experiences serving as a board member for local nonprofits and what he looks for when choosing organizations to support. Emily Schell, a member of the 2018-2019 **GTCF Youth Philanthropy Board**, talked about the importance of including people with lived experience of the issues in efforts to address those issues.



## SEVEN IMPORTANT IDEAS EMERGED FROM THE WAY YOUNGER GENERATIONS APPROACH PHILANTHROPY AND SERVING THE COMMUNITY:

### 1. Desire for Meaningful Experiences

"They're more of the 'lean-in' generation. They want to get their hands dirty. The ways we're seeing that is they'll raise their hand and say let's have a separate NextGen meeting outside of the regular board meeting and we'll tell you what the topics are that we want to talk about. They want to learn and research and figure out how they can engage in more impactful ways."

### 2. Being Heard

"Having a seat at the table, but also having a voice at that table is very important for us as Millennials. It has to be dialogue though, it has to be conversational. It can't just be yes/no questions because if it is then we feel you're just checking a box and you're not really into us and what we have to say."

### 3. Understanding of the 'Why'

"The why is so important for us. I need to know why you do what you do and why you serve the people you serve because I need to be able to explain my "why" for giving time away from my family and my kids whenever I'm serving."

### 4. 'Try Before You Buy' Opportunities

"We are skeptical. We don't have a lot of money, some of us, so we want to know how that money is being used. The best way for me to come and see how an organization is allocating their assets is to go and join and serve and see where that money is going. If it's tangible for me and I can touch and see the folks we're connecting with and giving assets to, then I can believe in what the mission and purpose of the organization is and I'm more apt to give financially when its time."

### 5. Representation

"If I went to an organization that serves inner-city communities and the board was made up of eight individuals who were all over-40, White professionals I would probably not be interested in serving on that board because I don't think my voice would be heard and you're showing me that you're not really interested in engaging the community. The board and the organization's staff has to reflect the community it's serving. That is very important"

### 6. Learning Opportunities

"I go to conferences, try to be involved in the community and get education from others, and I'm also in a Chartered Advisor in Philanthropy course. So, just pushing myself in getting the education I can, so I can share it back with family members and help figure out how we can change or innovate with what we're doing."

### 7. Influencers

"If a nonprofit is just posting an event on social media without anyone in my sphere of influence posting or re-sharing it then I won't pay attention to it. But, if it's someone that I know, that cares about what I care about, then I'll probably show up if I know they are going to be there as well."

The South Sound Philanthropy Summit highlighted many differences in the ways generations think and act when it comes to philanthropy, but one critical aspect remains the same as ever: the importance of building authentic relationships.



# Team Philanthropy Meets Client Vision While Fueling Innovative Community Investment.

Professional Advisors aren't alone when it comes to supporting their clients' philanthropic goals. A recent "game-changing" investment in Tacoma is paving the way for renewal and affordable housing in the Hilltop, illustrating the power of taking a team approach to philanthropy.

Key Private Bank Senior Vice President and Certified Financial Planner® Jun Chea is one of the trusted professional advisors of a local investor who had sizable capital gains to manage in early 2019. Following the suggestion of the investor's CPA, Chea and his client

researched opportunity zones. Opportunity Zones (OZ) are economically distressed communities where new investments may be eligible for preferential tax treatment.

Then, Chea attended GTCF's Professional Advisor Breakfast in May where the topic was Impact Investing. Toby Levy, Forterra VP of Real Estate Transactions and a panelist at the event, talked about the land trust's impact investing in Tacoma. That set into motion a series of conversations between the investor and his advisors, including a phone call to GTCF.

"We all saw this as a great strategy that would produce tax benefits," Chea says, "but also would allow the client to invest locally to benefit the entire community." GTCF helped make the connection to Forterra and work began to develop the Strong Communities Fund II (SCF II).

Levy, who calls SCF II, "One of the most advanced OZ funds in the country," says, "GTCF set the priority and we all worked with the investor and a whole raft of professional advisors to create the fund."

Levy credits the cooperative spirit of that process for the tight turnaround of a complex project: "It was an example of Tacoma's enlightened leadership, political will, and innovative mindset, enabled by a community foundation that plays in the political sphere."

Chea, whose office is a "stone's throw" from GTCF, says, "Having a partner like GTCF in Tacoma, who provides a tremendous amount of value for clients with a passion for charitable giving, has to be part of any financial advisor's practice."

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For the client, Chea says, the most important benefit of this investment has been, "being able to align their charitable strategy in a local project that will come to fruition because of this launch investment. That was more important to them than just reducing taxes."



Jun Chea, Key Private Bank Senior Vice President and Certified Financial Planner®





# Local Organizations Go Beyond The Gala For Deeper Donor Engagement

When she arrived at her post as president and CEO of **Goodwill of the Olympics and Rainier Region** in 2017, Lori Forte Harnick wanted to engage donors more deeply in the organization's transformational work. She had a vision: "More people should be invited to our beautiful work opportunity center so they can see us in action." With that goal in mind, she and her staff replaced the decades-old offsite Goodwill breakfast, a luncheon in more recent

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years, with a series of For the past 18 months, instead of one event for hundreds, Goodwill has hosted several "Rising Chefs" gourmet dinners, complete with wine pairings, for 40 to 60 of its biggest donors. As they enjoy food prepared by Goodwill's own **culinary students**, guests hear about the students' journeys to and through the training program and about the food they've prepared for the evening.

Goodwill is one of several local organizations exploring alternatives to the annual gala event fundraiser. While highly produced events and auctions can bring in big dollars, they also require significant staff resources and carry the risk of big losses if events don't strike the right balance of budgeting, memorable experiences for donors, and mission-inspired giving.

**Elements of Education**—the nonprofit that supports Tacoma Public Schools' SOTA, SAMi and iDEA high schools—recently reconfigured its long-running **ArtRageous** 400-guest gala auction and student showcase.

"We analyzed the amount we were bringing in and it wasn't matching the time and money we were spending," said Elements' Brittany Skobel. "We realized that if we switched to a smaller format, we could spend time telling our story and connecting with donors in a really significant way."

*"Every year, you have to ask yourself, 'What is the purpose of this event, what is it costing and what's the return?'"*



Based on input from staff, board members, and key donors, Elements split ArtRageous in two. They offered personalized invitations to its biggest past donors for one of two 100-guest three-course dinners. The redesigned events occur on subsequent evenings with streamlined auctions, more student stories, high-net dessert dashes, raffles, and a monthly contribution ask.

Elements spent less time and money on more intimate, mission-focused events with more time to connect personally with donors before, during, and after the events. They also received higher net revenue based on monthly giving that rolls over year to year.

At the **Point Defiance Zoo Society**, new executive director Ruthann Howell is overseeing a move away from the long-standing, high-profile Zoobilee to what she calls “more purposeful events”. She explains everything the Zoo Society is doing now to replace Zoobilee is focused on building authentic—as opposed to transactional—relationships.

*“the first step in connecting with potential donors: making friends.”*

A 30-year nonprofit fundraising veteran, Howell says, “Every year, you have to ask yourself, ‘What is the purpose of this event, what is it costing and what’s the return?’”

For Goodwill, Lori Forte Harnick says their new approach to fundraising events has yielded more personal stories and donor engagement, a better understanding of Goodwill’s programs, energized staff and board members, “... and way better food!”

Goodwill’s dinner events have not netted donations to match what the luncheon traditionally brought in, but

Lori says, “It’s a much richer donor experience that has worked really well as a ‘friendraiser.’ And that’s the first step in connecting with potential donors: making friends.” She adds that past event sponsors have turned their sponsorships into direct program support and that her staff is crafting a new fund development strategy.

## LEARN MORE

Fundraising consultant **Alyssa Wright** offers five key reasons nonprofits should consider going beyond the gala in her Network for Good webinar:

1. To engage the next generation of funders, who are generally more interested in direct program involvement than in being wined and dined
2. To enhance and retain strong donor relationships in ways that make them feel more closely aligned with the work you’re doing
3. To respond to an ever-changing philanthropic landscape where new tax laws, investments, etc. are changing how people think about stewarding their resources
4. To increase organizational efficiency by using people power to build relationships instead of to produce one big event
5. To raise more money

## Upcoming Fundraisers

**November 7**, Lead the Way Home Breakfast - Associated Ministries

**November 9**, Trivia Bee – Pierce County Library Foundation

**November 23**, Empty Bowls – Emergency Food Network

**January 25**, Right To Play Gala – Children’s Museum of Tacoma