

impact



Fall 09

Rose Community Foundation Board Chair Scott Levin (right) surprised John Reid, Pamela Craig and David Myers (left to right) of Metro Community Provider Network (MCPN) with an unexpected grant of \$28,500 in March. MCPN, which provides health care to uninsured and low-income individuals, was one of 64 direct-service grantees that received a total of more than \$1.1 million in unsolicited grants from the Foundation in late 2008 and early 2009.



Business as usual?

After a year of business being anything **but** usual, this issue of **Impact** takes a timeout from its usual format featuring Rose Community Foundation grantees. Instead, we asked our leaders to share their views about philanthropy in a time of change.

Mission Statement

Rose Community Foundation works to enhance the quality of life of the Greater Denver community through its leadership, resources, traditions and values.

We value our Jewish heritage and our roots in Jewish traditions including charity, philanthropy and nondiscrimination.

We value excellence and uphold the highest standards in the pursuit of our mission.

We value the trust and respect of the community and continually strive to earn and sustain that trust by consistent and disciplined adherence to our mission.

Rose Community Foundation's support for the Greater Denver community is focused in five program areas: Aging, Child and Family Development, Education, Health and Jewish Life. In addition to grantmaking, Rose Philanthropic Services is available to assist individuals and families in their philanthropic activities.

Leadership in a Time of Change

Views from Our Trustees

A year has passed since our nation's economy started going into shock. We have seen large corporations topple, unprecedented government intervention and a steep rise in human need as large numbers of people lose their jobs, homes and credit. Nowhere is the impact of this economic crisis more apparent than in the nonprofit community. Organizations that operate on a slim margin in the best of times are called on to provide more service with fewer resources in difficult times. Foundation assets, the source of grant dollars, are down. Like many foundations, Rose Community Foundation's assets dropped a third of their value in the last fiscal year. Our ability to provide grant support is diminished, and is not likely to return to 2008 levels for several years.

Few of us have lived during a period with so much change occurring so rapidly in so many areas of our society. For many in the nonprofit community, "change" simply means working proactively to improve people's lives – removing barriers and creating opportunities. In the nonprofit world, our work is different now; we are still trying to create positive change while we are engulfed in other kinds of change: the unforeseen consequences of the economic meltdown.

What role can foundations play in a time of change? Is it just the money? Or can

foundations contribute something else? At a time when government, business and individual households are taking a hard look at how they operate and what matters most, it seems appropriate for Rose Community Foundation to share with the public some reflections on

the role of philanthropy in our community today. Many of our Foundation's leaders bring seasoned perspectives on change from long and distinguished careers in business and public affairs, as well as their volunteer leadership in many organizations. Their experience and insights are a tremendous asset as we navigate through change.

This issue of *Impact* features the views of some of the Foundation's trustees who chair grantmaking and administrative committees. We hope their reflections on some key questions offer insight about the values that our volunteer leaders bring to the Foundation's work.



Sheila Bugdanowitz
President and CEO



Rose Community Foundation pays tribute to Founding Trustee Richard Tucker, who died on July 3 after a brief illness. Dick's contributions to the Foundation are beyond measure. A trustee from 1996 through 2004, he was among the first to establish a donor-advised fund at Rose. Dick was the principal architect of The Endowment Challenge, an initiative that created permanent endowments at 19 Jewish organizations. At the time of his death, he served on our Committee on Aging and Jewish Life Committee. We are grateful for Dick's many years of leadership.

In difficult economic times, nonprofit organizations are asked to do more, and funders have less money to give. Many foundations, including Rose Community Foundation, have preferred to fund innovative efforts and specific programs rather than support operations. How can Rose and other foundations respond most effectively to community needs in these times while remaining true to their missions?

Scott Levin: Rose Community Foundation has recognized the need many organizations currently have for money to simply keep their doors open. At the same time, the Foundation understands that the long-term goals of these valuable community assets cannot be lost, and there is a need for them to keep focused on their core missions.



Scott Levin

To deal with these divergent and somewhat contradictory realities, the Foundation provided unsolicited one-time grants to many of its grantees for the express purpose of keeping their operations running during this difficult economic time. At the same time, the Foundation continues to encourage nonprofits to submit grants as they always have. Moving forward, we will continue to take a very thoughtful and deliberative approach in reviewing grant requests.

Jennifer Adler: Now is the time for foundations to invest in the sustainability of their partner grantees – to fund their core services and not look to fund primarily new initiatives and programs. That said, if one key piece of the funder's mission is around innovation, it is important to not let that piece fall away completely. I believe Rose has done a good job of walking that line. The Foundation has been proactive in providing core support while not shying away from innovative ideas.

Neil Oberfeld: Foundations can be effective during difficult times by supporting innovation *and* organizational development. There tend to be great opportunities for innovation during economic downturns. And the quality and development of an organization's structure is critical during these times. Innovation and organizational development have always been cornerstones of Rose Community Foundation's mission.

Stephanie Foote: We need to not pull back if we are able. We need to continue to keep funding organizations that are providing essential services because those are the first ones that are feeling the pinch – nonprofits that provide direct services to the people who are most affected by the downturn.



Stephanie Foote

Dori Biester: Having a clear focus is important. The decisions we are making are focused on the current problems in the economy as well as our longer-term goals. We are choosing areas where there is evidence that we can continue to make a difference.

"Moving forward, we will continue to take a very thoughtful and deliberative approach in reviewing grant requests."

Government and individual donors contribute more financially to society's needs than foundations. Is there anything different or unique about the way foundation investments can meet needs and create opportunity?

Marjorie Gart: Foundations, in particular community foundations, have two things in their favor. First, they have the ability to look at an overview of a given community that an individual donor normally does not have. Second, they have the ability to fund without politics involved. A foundation can look at a community, see where the holes are, and work to fill those holes in a nonpartisan way. Community foundations can also help to direct the funding of individual donors into these needed areas.

Irit Waldbaum: Foundations can affect change faster than a government can. By doing so, they can meet need, create opportunities and improve on existing systems. One example is ProComp, which brought about a positive change in the public school system that could not have occurred without foundation help.

ProComp (denverprocomp.dpsk12.org) is Denver Public School's teacher compensation system, instituted in 2005. Rose Community Foundation was instrumental in supporting ProComp's creation and implementation.

Working to create change: Margaret Roberts (left) and Ray Meyers participate in a meeting of grantees who were funded through Rose Community Foundation's Boomers Leading Change initiative.



Scott Levin: There are certain things that only government can do and that foundations are ill-equipped to handle. For instance, as a society, we have agreed that government best serves as the safety-net provider for our poorest citizens. While foundations and individuals can certainly supplement what government does, foundations cannot get into the business of being, for instance, Medicaid or food stamp providers. Instead, foundations can best meet many of those critical needs by supporting government in providing assistance in the most efficient and economical manner.

Jean Galloway: The role of the convener is a vital role that any foundation can play in the community. One example is our Boomers Leading Change initiative. We opened the door for our colleagues within the foundation community to join us and we have been quite successful in mobilizing baby boomers. I think Rose in particular plays a convening role in our community and one of our real challenges from a resource standpoint is: where do we stop?



Jean Galloway

Boomers Leading Change is a Foundation initiative to engage baby boomers for social benefit. coloradoboomers.com

Jennifer Atler: In addition to funding, a unique role for foundations is providing the risk capital necessary to test and prove new ideas that could improve current government services. If an organization comes up with a new, untested program, foundations can fund the piloting and evaluation to see if it is effective.

Foundations can offer more than financial support. What are some of the other ways that foundations support the communities or constituencies they serve?

Dori Biester: One of the most significant ways foundations can support the community is through advocacy. Foundations really represent a community advocating and caring for itself.

Irit Waldbaum: Public service – for example, 9NEWS Senior Source. The relative cost of the project was not very high, yet it has reached and helped many constituents. Another example is our support of some political initiatives that have a direct impact on our program area priorities.

9NEWS Senior Source is a Web-based informational resource for older adults and their caregivers. 9news.com/advertorial/seniorsource/

seniorsource
A RESOURCE FOR AGING AND LIVING WELL

Scott Levin: Foundations serve a unique role in our communities. Not only do they have financial resources that typically outstrip those of individuals, they also can bring top talent to support the communities and constituencies they serve. Our program officers are recognized nationally for their expertise in their program areas. That expertise is employed in many different ways to assist potential and actual grantees, as the program officers can help shape grant proposals and direct applicants to other resources in the community.

Jennifer Adler: Foundations can be conveners, bringing different organizations together to work toward shared goals. They can gather critical information that informs the sector and helps focus our work, for example, the *2007 Metro Denver/Boulder Jewish Community Study*. They can provide training that exposes

larger groups to professional development opportunities that strengthen the entire sector. Foundations can use their resources to leverage outside gifts, for example, Live On.

Rose Community Foundation was the major funder of the 2007 Metro Denver/Boulder Jewish Community Study, which can be found at: rcfdenver.org/publications_reports.htm.



Live On: Build Your Jewish Legacy is a Foundation grant initiative to help Jewish organizations and their donors promote a culture of endowment giving through wills and estate plans. liveonlegacy.org

Stephanie Foote: One of the most important things we can do right now is connect groups that are doing the same types of work and get them to coordinate with each other – networking among the nonprofits in the community. If you look at it from the outside in, sometimes you see several small nonprofits trying to do the same thing. We know what a lot of different people are doing and we can see the similarities and synergies.



Marjorie Gart

Marjorie Gart: We can be the catalyst for better efficiency and effectiveness in service delivery. We can offer technical support through our staff and our knowledge. These activities are even more necessary at times like this when resources are scarce.

"Foundations really represent a community advocating and caring for itself."

"I think foundations are much more community-oriented now and I think they will continue to be in the future."

From your perspective, what are the important changes that you have seen in the foundation world over the past 10 to 20 years? What changes do you see in the future?

Stephanie Foote: The biggest change I've seen in the past 10 to 20 years is that a lot of the money used to be what I would call quiet money. So many people were not aware that resources were available to them. I think foundations are much more community-oriented now and I think they will continue to be in the future.

Irit Waldbaum: In the near future, I see us staying closer to our core mission in order to make our funding go as far as we can.

Dori Biester: It will continue to be important for foundations to look for a return on their investments in programs and ideas. To have a long-range



Irit Waldbaum

impact on major issues, foundations need to think about whether they are willing to make an ongoing commitment.

Jennifer Adler: I see a continuing trend toward more collaboration among funders. Foundations will work less in silos and more in partnership with other funders to further leverage their investments.



Jennifer Adler

Scott Levin: Engagement. Foundations have become involved not only in analyzing proposals, but helping to shape them. At Rose Community Foundation, we take pride in several initiatives that likely would not have come from a foundation more than 10 years ago.

Led by Latinos, for Latinos: grantees of the Latino Community Foundation of Colorado (LCFC). The LCFC was formed in 2007 when Rose Community Foundation partnered with Hispanics in Philanthropy, The Jay and Rose Phillips Family Foundation and Western Union Foundation.



Community Updates

Foundation Boosts Emphasis on Donor-Directed Giving



Lisa Robinson

Rose Community Foundation has expanded its focus on donor development with the hiring of Lisa Robinson as director of philanthropic services. Robinson served as director of community relations at Rose Community Foundation during its startup from 1995 to 1999. Prior to that, she served as development director at The Women's Foundation of Colorado and as public relations director at The Children's Hospital. She has a bachelor's degree from Smith College.

The Foundation has also formed a new Philanthropic Services Committee chaired by Trustee Marjorie Gart. The committee

advises the philanthropic services department. Prior to becoming a trustee in 2005, Gart headed Donor and Endowment Services at Rose, where she also managed a three-year initiative to build \$19 million in new permanent endowment funds for 19 local Jewish organizations. She has been an active volunteer in a number of local nonprofit

organizations and is a graduate of the Leadership Denver program. Gart earned a B.A. in English from Dartmouth College and an M.B.A. from Harvard University.



Marjorie Gart

MazelTot Launch

A new Rose Community Foundation initiative will be up and running as of mid-September 2009. MazelTot is a two-year grant initiative to promote and discount Jewish programs for Jewish families with children under age five and expectant Jewish parents. Twenty-nine Jewish organizations in Denver and Boulder are participating. Learn more at mazelatot.org.



Connecting young families to Jewish life

New Managing Director for Latino Community Foundation of Colorado



Yolanda Quesada

Yolanda Quesada has been named managing director of the Latino Community Foundation of Colorado (LCFC). Established in 2007, the LCFC promotes Latino philanthropy and awards

grants to strengthen and support nonprofit organizations across the state that are led by, and serve, Latinos. The project is an initiative of Rose Community Foundation in partnership with Hispanics in Philanthropy, The Jay and Rose Phillips Family Foundation and Western Union Foundation.

"Letting donors have a say in where the donations go helps keep them engaged with the recipients and their work."



Neil Oberfeld

the philanthropic intent of the donor. It is important to honor the commitment made to the original donor. Among other reasons, it is the assurance to future donors that their intent will be honored.

Marjorie Gart: I don't know if it's the *best* model, but it is the *right* model because it breeds engaged donors. Arguably, a donor might not always know what is best for a

Neil Oberfeld: It is certainly easy to argue to disregard a donor's original intent, particularly where there are so many compelling needs in our community. However, it is of fundamental importance not to forget that these funds would not exist today were it not for

community. But if you educate donors to understand the needs of a community or constituency, then you should get to a point where the donor's intent matches the needs.

It is the responsibility of foundations and nonprofit organizations to fill that hole – to interact with donors in such a way that the donor's intent does meet the community's needs. It is also important to recognize that sometimes a donor may have an idea that an organization may resist, but that may really be a good idea.

Irit Waldbaum: I feel that donor intent is still the best model for philanthropy. Letting donors have a say in where the donations go helps keep them engaged with the recipients and their work.

Dori Biester: Donor intent is critically important but equally important is that there is a match between a foundation and donor. They have to have compatible goals. When that exists, it is essential to uphold the donor's intent.



Dori Biester

Stephanie Foote: Donor intent makes sense to an extent because some donors may have a special interest. But in general, people should really give unrestricted donations and let staff and boards go through a process to make sure it gets to the right place. If you're going to give money to a foundation, you should give it because you like what that foundation does.

Students can earn a free computer as part of OpenWorld Learning's after-school technology program. The organization has received grants from Rose Community Foundation and two of the Foundation's donor-advised funds: RLC Foundation and Rose Women's Organization.



Many Colorado foundations are playing a leadership role in addressing an important issue or challenge. Name one (other than Rose) that has caught your attention and is making a difference. How is it making a difference?

Irit Waldbaum: The Colorado Health Foundation. At this time when so many people are uninsured and have no way of receiving proper medical care, especially in rural areas, the Colorado Health Foundation plays an important role in filling that void. coloradohealth.org



The Colorado Health Foundation™

Scott Levin: I have been very impressed by The Denver Foundation's attempt to bring its donors and other organizations together to address the problem of hunger during these difficult economic times. denverfoundation.org



THE DENVER FOUNDATION

Jennifer Adler: The Temple Hoyne Buell Foundation is making a big difference in our state. Their focus is narrower than Rose Community Foundation's (focused on early childhood, specifically), but that has enabled them to make a meaningful impact in that sector of the nonprofit community. buellfoundation.org

TEMPLE HOYNE
BUELL FOUNDATION

Jean Galloway: The givingfirst.org program that Community First Foundation started a couple of years ago has been tremendous for the nonprofit sector. More than 200 nonprofit partners are actively raising money through the site. communityfirstfoundation.org



The Power of Philanthropy

Dori Biester: Donnell-Kay Foundation and The Piton Foundation. Both have an important focus on education and the well-being of youth. dkfoundation.org
pitonfoundation.org



DONNELL-KAY FOUNDATION

THE PITON FOUNDATION



THE COMMUNITY INVESTMENT DIVISION OF
GARY-WILLIAMS ENERGY CORPORATION



The Colorado Association of Funders (CAF) is a nonprofit regional membership organization for grantmakers throughout the state. CAF's mission is to bring people, information and resources together to promote effective and responsible philanthropy in Colorado. The group has approximately 80 members, ranging from small family foundations to large foundations that fund statewide. coloradofunders.org

Besides Rose Community Foundation, what are some other organizations or efforts with which you are proud to be involved?



A child care provider gets a kick out her young charge at Clayton Early Learning.

Jennifer Adler

Invest in Kids – iik.org

Dori Biester

Clayton Early Learning –

claytonearlylearning.org

Gates Family Foundation –

gatesfamilyfoundation.org

Stephanie Foote

Girl Scouts of Colorado –

girlscoutsofcolorado.org

YMCA of Metropolitan Denver –

denverymca.org

Food Bank of the Rockies –

foodbankrockies.org

Jean Galloway

Governor's Residence Preservation Fund

Denver Sports – denversports.org

Marjorie Gart

The Women's Foundation of Colorado – wfco.org

Allied Jewish Federation of Colorado – jewishcolorado.org

The Nature Conservancy – nature.org

Scott Levin

Anti-Defamation League – adl.org

Mile High Montessori Early Learning Centers – milehighmontessori.org

Temple Emanuel – congregationemanuel.org

Neil Oberfeld

Anti-Defamation League – adl.org

University of Denver Bridge Project – <http://www.du.edu/bridgeproject/>

Irit Waldbaum

Hillel of Colorado – hillelcolorado.org

Denver's Road Home – denversroadhome.org

Rose Community Foundation's Leaders

Rose Community Foundation is fortunate to be guided by a large number of volunteer community leaders who serve as trustees and committee members. The board of trustees provides stewardship for the Foundation's resources and sets Foundation policy to ensure consistency with its mission. Every trustee also serves on one or more committees, where they are joined by other issue experts and community

leaders whose responsibilities include decisions on funding requests, fiscal oversight and donor outreach. These committees include: Aging, Audit, Board Development, Child and Family Development, Education, Health, Investment, Jewish Life and Philanthropic Services. Below is an alphabetical list of the Foundation's current board and committee leadership.

Raydean Acevedo
Milroy A. Alexander
Judy Altenberg
Jennifer Atler
Dori Biester, Ph.D.
Dawn P. Bookhardt
David C. Boyles
Linnea "Nea" Brown
Lisa Reckler Cohn
Mary Gittings Cronin
Barry Curtiss-Lusher
Philip P. DiStefano, Ph.D.
Bill Elfenbein
Steven W. Farber
Stephanie Foote
David Foster
Jean Galloway
Marjorie Gart
Jerrold L. Glick
Lezlie Goldberg
Lynda Goldstein
Lindsey Gutterman

Fernando R. Guzman, III, Ph.D.
Arlene Hirschfeld
Gerri Gomez Howard
Walter Isenberg
Joy S. Johnson
Douglas L. Jones
Helayne B. Jones, Ed.D.
Cynthia Kahn
Bruce T. Karpas
Steven Kaufmann
Kenzo S. Kawanabe
Rob Klugman
Judy Koff
Rick Kornfeld
Donald L. Kortz
Steven Kris
Stephen S. Kurtz
Scott L. Levin
William N. Lindsay, III
James A. Lustig
Evan Makovsky

The Honorable Michael
A. Martinez
Ronald E. Montoya
Monte Moses, Ph.D.
Neil Oberfeld
Michelle Osterman
Sister Lydia M. Peña, Ph.D.
André Pettigrew
James Polsfut
Dean Prina, M.D.
Barbara R. Reed, M.D.
Kristin Richardson
Daniel L. Ritchie
Richard L. Robinson
Michele Roth Scharg
Stephen H. Shogan, M.D.
Martin H. Shore
Robert A. Silverberg
Bobbie Towbin
Irit Waldbaum
Rabbi Raymond Zwerin

Staff

Sheila Bugdanowitz, President & CEO
Chandra Al-Khafaji, Program Assistant
Juanita Atkins, Accounting Assistant
Ryan Brown, Controller
Whitney G. Connor, Program Officer
Therese Ellery, Senior Program Officer
Anne Garcia, Chief Financial and Operating Officer
Phil Gonring, Senior Program Officer
Cathleen Hall, Philanthropic Services Assistant
Peggy Hermann, Executive Director, Jewish Women's
Fund of Colorado
Marci Hladik, Communications and Database Associate

Elsa Holguín, Senior Program Officer
Sarah Indyk, Jewish Life Initiatives Manager
Susan Knudten, Senior Communications Officer
Linda Lee, Coordinator of Office Services
Cheryl McDonald, Grants Manager
Lisa Farber Miller, Senior Program Officer
Phil Nash, Vice President for Communications
Gretchen Perryman, Executive Assistant
Yolanda Quesada, Managing Director, Latino Community Foundation
of Colorado
Lisa Robinson, Director of Philanthropic Services
Anita Wesley, Philanthropy Advisor



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COMING SEPTEMBER 17

MazelTot

Connecting young families to Jewish life

MazelTot is a nondenominational, no-obligation initiative of Rose Community Foundation
(rcfdenver.org) in collaboration with 29 organizations and congregations.