



# 2015

REPORT TO THE COMMUNITY



# BUILDING & SUSTAINING PARTNERSHIPS

In 2015, Philanthropy Northwest's board, staff and stakeholders engaged in the development of our new strategy framework, affirming our vision and clarifying our role as your thought and action partner for Northwest communities with vibrant, healthy futures that honor our past, our people and our cultures. This framework is grounded in our organization's aspirations and values, reflected in our work together throughout the year.



## 2015 HIGHLIGHTS

- **Valuable for All Types of Philanthropy:** Our learning network grew to 182 foundations and corporate giving programs, with 845 people attending at least one of our programs, briefings, trainings and workshops.
- **Relevant and In Demand:** The Giving Practice, our national consulting team, worked with 54 funders and collaboratives, creating and sharing tools and resources to support the field, including a new strategy guide for community foundations.
- **Self-Sustaining and Financially Viable:** We were extremely honored to receive a three-year, \$3 million grant from Satterberg Foundation to support new program design and ways of learning and sharing knowledge.
- **Convening Conversations:** Through our Local Matters series, we explored distinctive and innovative approaches to place-based philanthropy in Wyoming, Idaho, Montana, Alaska and Washington.
- **Supporting Shared Learning and Action:** We launched our Momentum Fellowship, with significant support from Meyer Memorial Trust and Marguerite Casey Foundation, recruiting and placing nine emerging philanthropy leaders of color at six foundations in Alaska, Washington and Oregon.
- **Incubating and Activating Ideas:** After seven productive years on our incubation platform, Mission Investors Exchange determined it was ready to pursue its own 501(c)(3) status as a national impact investing network. We deepened our relationship as fiscal sponsor of Community Democracy Workshop and welcomed Cascadia Foodshed Financing Project, a regional impact investing collaborative.
- **Building Cross-Sector Networks:** Public policy work remained an important component of advancing healthy, equitable and inclusive communities. We also strengthened our relationships with national philanthropy-serving organizations, state nonprofit associations and other partners.

We learn from you every day, as we offer you a place to connect, share and take action. As you'll see in the charts and stories that follow, our financial status and community relationships are stronger than ever. In 2016, we'll celebrate our 40th anniversary (wow!) at our annual conference in Missoula, Montana. Whether you've been part of Philanthropy Northwest for 40 years or four months, we are honored to have you in our network and grateful for the incredible work you are doing in our communities every day.

Sincerely,

A handwritten signature in black ink, appearing to read 'Audrey Haberman'. The signature is fluid and cursive, with a long horizontal line extending to the right.

Audrey Haberman  
Interim CEO

# LOCAL MATTERS

Last year, Philanthropy Northwest members requested more local programming across our six-state network. In response, we replaced our annual conference in 2015 with a series of focused, local events. Through Local Matters, we explored and connected our region's many distinctive, innovative approaches to building stronger, more resilient communities.

## Local Matters 2015



### 75 people met in Sheridan, Wyoming on April 27 & 28

*Philanthropy is... Right Next Door.* A celebration of a community where neighbors take care of each other, including stories of community partnerships and Give Sheridan, a new philanthropic effort.



### 64 people met in Boise, Idaho on May 27

*Philanthropy is... Entrepreneurial.* A discussion of how market, socially-motivated and philanthropic capital can be blended and matched to generate investments in education, local businesses and food systems.



### 103 people met in Big Sky, Montana on June 17 & 18

*Philanthropy is... Networks in Action.* An exploration of how community problem-solving requires making connections across issues and seeing beyond boundaries.



### 60 people met in Anchorage, Alaska from October 11 to 14

*Philanthropy is... Indigenous Ways of Knowing.* As guests of First Alaskans Institute, we engaged with Alaska Native and Native American leaders and families to experience communities creating their own solutions and futures.



### 64 people met in Bellingham, Washington on November 3 & 4

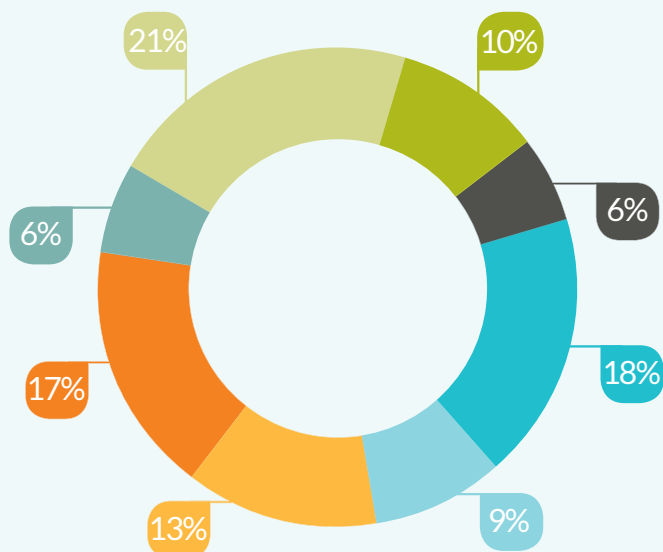
*Philanthropy is... Convening.* We focused on philanthropy's trusted role as an initiator and nurturer of conversations between institutions and community partners.

We look forward to applying what we've learned as we return to our annual conference format, *Under One Sky* in Missoula, Montana, September 13-15, 2016.

# THE GIVING PRACTICE

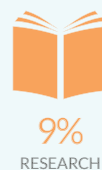
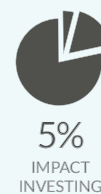
Our national consulting team worked with 54 funders and collaboratives in 2015, creating and sharing tools and resources to support the field.

## OUR CLIENTS BY CATEGORY

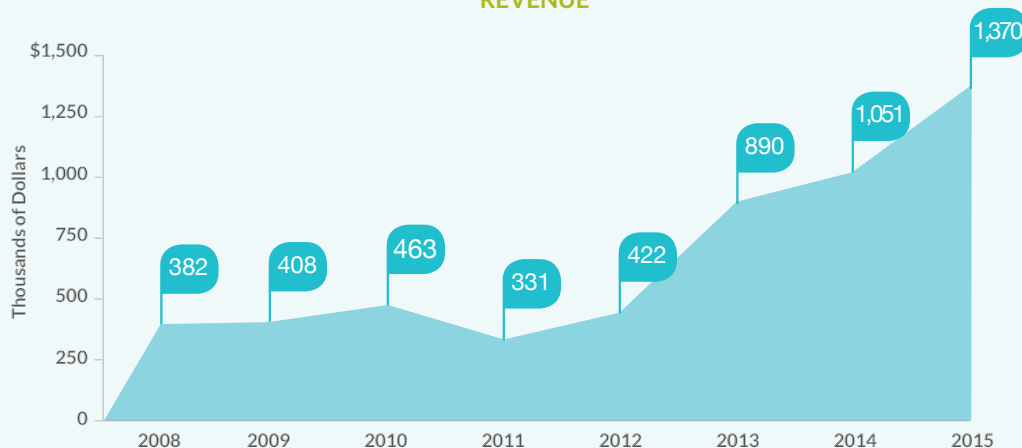


- Community Foundation
- Corporate
- Family Foundation
- Funder Collaborative
- Independent Foundation
- Nonprofit & Academic Funders
- Philanthropy-Serving Organization
- Public Foundation

## OUR PROJECTS BY TYPE



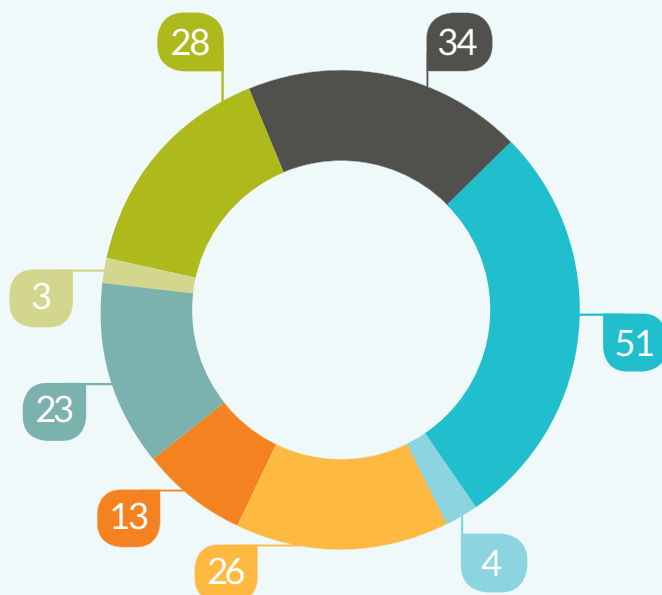
## REVENUE



# THE LEARNING NETWORK

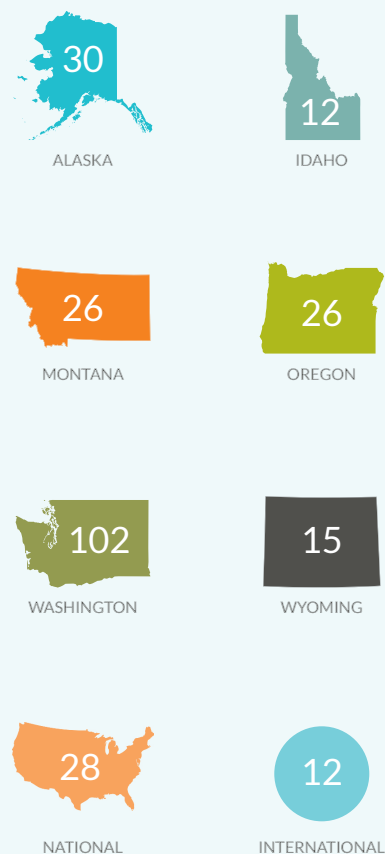
Our network grew to 182 philanthropic organizations, with 845 established and emerging leaders participating in at least one program in 2015.

OUR MEMBERS BY CATEGORY



- Community Foundation
- Corporate
- Family Foundation
- Government Grantmaker
- Independent Foundation
- Nonprofit Funder
- Operating Foundation
- Public Foundation

WHERE OUR MEMBERS FUND



MEMBERSHIP



# PUBLIC POLICY

Building strong communities requires creating an environment in which philanthropic organizations can work collaboratively with all levels of government to effect positive change. Philanthropy Northwest is uniquely positioned to connect funders and policymakers over shared interests, on behalf of our sector and partners.

**FOR FUNDERS:** Philanthropy Northwest monitors issues that affect our sector in the Northwest and nationwide. We share knowledge and resources through our communications, programs, trainings and workshops to keep funders informed, engaged and connected.

**FOR POLICYMAKERS:** Philanthropy Northwest works on behalf of the sector to keep elected officials informed of the impact philanthropy is making in our region and across the country, engaging them in programming to help them stay connected to the philanthropic and nonprofit organizations in our communities.



In 2015, this work included:

- Leading a delegation of Northwest funders to Washington, D.C. for the annual Foundations on the Hill convening, where we met with senior White House officials and more than 20 members of Congress from our six-state region, discussing topics ranging from impact investing to Native youth.
- Hosting conversations with former Sen. Olympia Snowe on the work of the Bipartisan Policy Center, Interior Secretary Sally Jewell on preparing new generations of outdoor stewards, and other regional and national policymakers and thought leaders.
- Joining with state nonprofit leaders to advocate against federal funding cuts to AmeriCorps, Senior Corps and veterans services.
- Expressing our support for the America Gives More Act, then celebrating as Congress restored its three charitable giving tax incentives and made them permanent.
- Encouraging members to submit comments on an IRS proposal for nonprofits to collect, store and report donor Social Security numbers and other information.

In 2016, our public policy work will include an updated edition of Daniel Kemmis' *Philanthropy and the Renewal of Democracy* monograph, ongoing fiscal sponsorship of our national Community Democracy Workshop project, our annual participation in Foundations on the Hill and a suite of programs and conference sessions related to philanthropy's role as an advocate for our communities.

# MOMENTUM FELLOWSHIP



*From left to right: Marcelo Bonta, Meyer Memorial Trust; Elizabeth Posey, Marguerite Casey Foundation; Kim Sogge, Pride Foundation; Janelle Choi, Marguerite Casey Foundation; Kelsey Potdevin, Rasmuson Foundation; Sharon Wade Ellis, Meyer Memorial Trust; Eduardo Moreno, Northwest Health Foundation; Dalian Yates, The Oregon Community Foundation; Katherine Porras, Meyer Memorial Trust.*

Studies confirm that diverse teams increase innovation, creativity and effective decision-making. Yet while the demographics of our nation shift rapidly towards greater diversity, philanthropy has been slow to adapt. In 2014, 92% of foundation chief executives and 83% of other executive staff members identified as Caucasian, a percentage that had not changed over the last five years, according to D5 Coalition research.

Our Momentum Fellowship, launched Fall 2015, is designed to create a pathway for individuals from communities of color to pursue leadership careers in philanthropy. The program grew out of our CEO peer learning cohort focused on diversity, equity and inclusion, as Northwest foundation leaders acknowledged the need to take actionable steps towards changing the field.

Philanthropy Northwest recruited and placed nine rising leaders at six foundations in Alaska, Oregon and Washington: Marguerite Casey Foundation, Meyer Memorial Trust, Northwest Health Foundation, The Oregon Community Foundation, Pride Foundation and Rasmuson Foundation. Each fellow was placed in a full-time role for 18-24 months. Complementing this on-the-job learning, Philanthropy Northwest provided professional development, coaching, mentorships, networking opportunities and reflective practice to support fellows in their current roles and future careers — sharing their journey through our blog and social media channels.

We celebrate this first class of Momentum Fellows and applaud their incredible work at their host foundations and in our communities. We are eager to continue developing and sharing this experience with our network and the field, as we begin recruiting our second cohort of fellows and foundations.

# NEW RESOURCES

Our resource library includes a wide range of documents, tools and recordings designed and curated by Philanthropy Northwest staff and consultants. In 2015, we shared 50 new resources, including two publications we created:

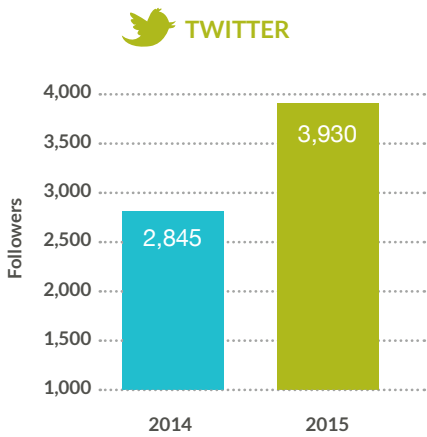
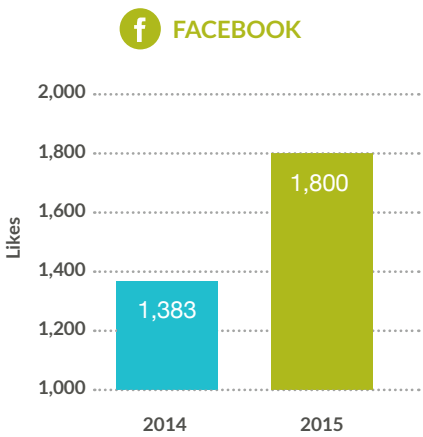
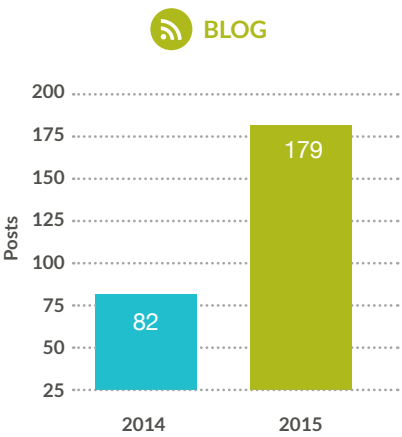


In our 5th edition of *Trends in Northwest Giving*, we analyzed 23,783 grants to Northwest organizations from 245 funders in 2012, totaling \$958,347,806. The report details dramatic state-by-state variations in overall giving, corporate, education and health funding.



The Giving Practice invites you to test-drive 10 activities to bring your current work into focus. Whether you are just beginning a strategic planning process or have a plan that is languishing on a shelf, this guide helps turn frustration and doubt into curiosity and joy.

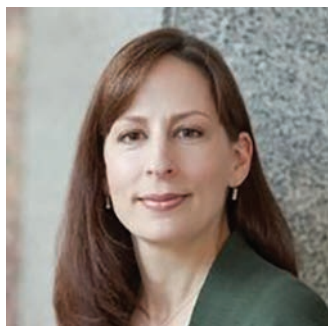
# COMMUNICATIONS



We successfully scaled up our efforts to promote conversations and engage audiences about the work of Philanthropy Northwest staff, consultants, members and partners through our blog and social media channels.

# OUR AMBASSADORS OF 2015

Named in honor of a beloved community leader, our Mary Helen Moore Ambassador of the Year Award recognizes a Philanthropy Northwest member who has demonstrated remarkable leadership and made personal contributions — beyond financial support — that benefit the entire network.



## INDIVIDUAL Cat Martin, JPMorgan Chase

An active member of Philanthropy Northwest's learning network, Cat Martin, JPMorgan Chase vice president & global philanthropy relationship manager in the Pacific Northwest, significantly supported much of our work this year. We valued her participation in our new Cascadia Foodshed Financing Project to address regional food chain supply challenges; strategies for veterans transitioning to civilian life; Seattle youth workforce development and

employment; and our Local Matters series of community conversations across our region. She also served as a gracious sounding board, elevating our thinking around women's leadership within philanthropic institutions and challenges unique to corporate philanthropy. We thank you, Cat, for your leadership and partnership in 2015.



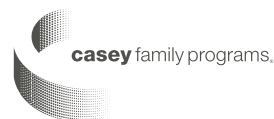
## ORGANIZATION First Alaskans Institute

The staff and board at First Alaskans Institute, led by President/CEO Liz Medicine Crow, were tremendous partners with our Local Matters: Alaska + Indigenous Communities convening, and really are a living and breathing example to us of intentional and authentic community building. Their strength and grace in advancing Alaska Native peoples and their communities; developing the next generation of leaders; welcoming us into their community with open hearts; teaching us how to deeply engage; and challenging the status quo of traditional

philanthropy, is an absolute inspiration to us and role model for philanthropy. We thank you, First Alaskans Institute, for reminding us that the closest distance between two people is a story.

# LEAD SUSTAINING PARTNERS OF 2015

THE PAUL G. ALLEN  
FAMILY FOUNDATION



BILL & MELINDA  
GATES foundation

JPMORGAN CHASE & CO.



Satterberg foundation

DENNIS & PHYLLIS  
WASHINGTON  
FOUNDATION

# STATEMENT OF FINANCIAL POSITION

As of December 31, 2015 • From Audited Financial Statements

## ASSETS

### Current Assets

Cash & Investments	\$3,834,349
Other Assets	3,465,149

### Total Assets

**\$7,299,498**

## LIABILITIES & NET ASSETS

### Current Liabilities

\$ 777,524

### Non-Current Liabilities

19,608

### Net Assets

Unrestricted 1,725,692

Temporarily Restricted 4,776,674

### Total Liabilities & Net Assets

**\$7,299,498**

# STATEMENT OF ACTIVITIES

Year Ended December 31, 2015 • From Audited Financial Statements

## SUPPORT & REVENUE

### Contributed Income

Grants & Contributions: Restricted	\$5,250,393
Grants & Contributions: Unrestricted	301,981

### Earned Income

In-Kind Contributions	6,250
Conferences & Training Fees	253,922
Fiscal Services	37,372
Job Bank	35,266
The Giving Practice*	1,370,120

### Membership Dues

1,085,419

### Interest

9,168

### Total Support and Revenue

**\$8,349,891**

## EXPENSES

### Program Services

Membership services	\$438,358
Conferences & Training	300,258
The Giving Practice	1,496,539
Mission Investors Exchange	1,117,838
Community Democracy Workshop	322,294
Cascadia Foodshed Funders Project	69,064
Special Initiatives	879,944

### Total Program Services

4,264,295

### Supporting Services

General & Administrative	445,494
Fund raising	73,601

### Total Supporting Services

519,095

### Total Expenses

**\$5,143,390**

Increase (Decrease) in Net Assets \$3,206,501

Net Assets, Beginning of Year \$3,295,865

**Net Assets, End of Year \$6,502,366**

\*Not including grants received

Philanthropy Northwest continues to grow across program areas, with an evolving mix of revenue streams. In 2015, we were honored to receive a \$3 million, three-year capacity-building grant from Satterberg Foundation. Our 2015 audit reported a clean bill of fiscal health.

# OUR MEMBERS\*

We welcome our **new members**, thank our **sustaining partners** and look forward to celebrating 40 years of advancing effective, collaborative philanthropy with our network in 2016.

501 Commons <b>Alaska Airlines</b> Alaska Children's Trust Alaska Community Foundation Alaska Conservation Foundation Alaska Kidney Foundation The Alaska Mental Health Trust Authority The Angora Ridge Foundation <b>Apex Foundation</b> <b>Arakawa Foundation</b> Norman Archibald Charitable Foundation Arctic Slope Community Foundation Bainbridge Community Foundation The Ballmer Group, Philanthropy The Bamford Foundation Bank of America BECU The Behnke Foundation Bethel Community Services Foundation Bezos Family Foundation The Loyal Bigelow & Jedediah Dewey Foundation <b>Alan Biller &amp; Associates</b> Blue Mountain Community Foundation <b>The Boeing Company</b> Bozeman Area Community Foundation Building Changes The Bullitt Foundation Cambia Health Foundation Campion Foundation Casey Family Programs Annie E. Casey Foundation <b>Marguerite Casey Foundation</b> Cedarmere Foundation <b>Ben B. Cheney Foundation</b> Chuckanut Health Foundation CIRI Corporation The CIRI Foundation Bill Clapp <b>Clark Nuber PS</b> <b>CliftonLarsonAllen LLP</b> College Spark Washington <b>Grenold &amp; Dorothy Collins</b> Alaska Charitable Trust <b>Comcast Foundation</b> Community Foundation for Southwest Washington Community Foundation of North Central Washington	Community Foundation of Snohomish County The Community Foundation of South Puget Sound The Denali Commission <b>Dietel Partners</b> Dupar Foundation <b>The O.P. &amp; W.E. Edwards Foundation</b> <b>Gordon Elwood Foundation</b> <b>Empire Health Foundation</b> Employees Community Fund of Boeing Puget Sound Enterprise Community Partners The Equipoise Fund Hugh & Jane Ferguson Foundation First Alaskans Institute <b>First Federal Community Foundation</b> First Interstate BancSystem Foundation The Foraker Group The Ford Family Foundation Ford Foundation Forest Foundation June & Julian Foss Foundation <b>Foundant Technologies</b> Foundation for Community Vitality Foundation for Healthy Generations <b>Bill &amp; Melinda Gates Foundation</b> Gilhousen Family Foundation The Greater Tacoma Community Foundation Group Health Foundation Grousemont Foundation <b>Harbourton Foundation</b> Harvest Foundation Holland America Line Home Partnership Foundation Horizons Foundation John C. Hughes Foundation Humanities Washington Humboldt Area Foundation Idaho Nonprofit Center Henry M. Jackson Foundation Jefferson County Community Foundation <b>Jones Family Foundation</b> <b>JPMorgan Chase</b> Juneau Community Foundation Charles F. Kettering Foundation KeyBank The Kirkpatrick Family Foundation	Kirlin Charitable Foundation Kitsap Community Foundation Kittitas County Community Foundation Sally S. Kittross Family Fund Kumin Foundation <b>The Lemelson Foundation</b> Donald & Marcia Liebich Fund The Longbrake Family Foundation Loom Foundation Mannix Canby Foundation Charlotte Martin Foundation <b>Mat-Su Health Foundation</b> <b>Medina Foundation</b> <b>Meyer Memorial Trust</b> Microsoft Alumni Foundation <b>Microsoft Philanthropies</b> Montana Community Foundation Montana Healthcare Foundation Montana Justice Foundation Montana Nonprofit Association Moss Adams Foundation Mountain Sky Guest Ranch Fund <b>M.J. Murdock Charitable Trust</b> Native Arts & Cultures Foundation The Dan & Pat Nelson Family Foundation <b>Nesholm Family Foundation</b> Nonprofit Association of Oregon The Norcliffe Foundation <b>Northwest Area Foundation</b> Northwest Children's Fund Northwest Credit Union Foundation <b>Northwest Health Foundation</b> Olympic View Community Foundation Orcas Island Community Foundation Oro y Plata Foundation Outerwall Pacific Continental Bank Pacific Hospital Preservation & Development Authority Pangea Giving Pembroke Perlin Fund Potlatch Fund Premera Blue Cross Presbyterian Foundation Pride Foundation <b>Privateer Holdings</b> <b>Quixote Foundation</b> Raikes Foundation <b>Rapp Family Foundation</b> Rasmuson Foundation	Raynier Institute & Foundation Red Lodge Area Community Foundation REI Renton Community Foundation The Frances & David Rose Foundation The Russell Family Foundation Samis Foundation Satterberg Foundation Schultz Family Foundation Sealaska Corporation Sealaska Heritage Institute <b>City of Seattle</b> Seattle Foundation <b>The Seattle Times</b> <b>Seattle-King County Dental Society Foundation</b> <b>Serve Washington</b> <b>Doyle &amp; Donna Shepherd Foundation</b> <b>Sherwood Trust</b> Skagit Community Foundation Social Justice Fund Northwest Social Venture Partners Starbucks Coffee Company & Foundation The Steele-Reese Foundation <b>The Stewardship Foundation</b> Three Rivers Community Foundation Thrive Washington Titcomb Foundation United Way of King County Washington Academy of Family Physicians Washington Dental Service Foundation <b>Dennis &amp; Phyllis Washington Foundation</b> Washington Nonprofits Washington STEM Washington Women's Foundation Wells Fargo Whatcom Community Foundation Women's Funding Alliance Woodworth Family Foundation Wyman Youth Trust <b>Wyoming Community Foundation</b> Wyoming Nonprofit Network Yakima Valley Community Foundation The Peg & Rick Young Foundation
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\*As of April 2016

# UNDER ONE SKY

**Philanthropy Northwest**  
**2016 Annual Conference & Membership Meeting**  
September 13-15, 2016 • Missoula, Montana



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Seattle, WA 98121

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[philanthropynw.org](http://philanthropynw.org)