Leading the Field

Volume 2

Fall 2004

Profiles of Community Foundation Leadership in Building Better Communities

Funders' Network
For Smart Growth and Livable Communities

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Presented by the Funders' Network for Smart Growth and Livable Communities

Fall 2004

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The mission of the Funders' Network for Smart Growth and Livable Communities is to expand funders' abilities to support organizations working to build more livable communities through smarter growth policies and practices.

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Foreword

Many of the actions that need to be taken to assure that communities grow in ways that benefit everyone are local. Community foundations represent an existing philanthropic infrastructure capable of influencing change at the local level across North America. As a result, in 2000, community foundations within the Funders' Network for Smart Growth and Livable Communities joined forces to nurture community foundation leadership in the livable communities movement and within the Network. This led to the creation of the Network's Community Foundations Leadership Project (CFLP) which strives to assure that this critical constituency of place-based grantmakers has the information, resources, and connections it needs in order to impact smart growth and sustainable development issues.

To help foster information-sharing and raise awareness among the more than 600 community foundations in North America, the Network commissions research to document the stories and experiences among the community foundations with whom we currently work. This profile of community foundation leadership in smart growth and livable communities issues was undertaken to further this goal. In 2003, the Network commissioned Victoria Eisen, a California-based transportation and regional planning consultant, to interview our community foundation membership and develop the profiles that comprise this guide. This report complements the first edition of *Leading the Field*, which the Network produced in March 2001 as one of the first products of the CFLP. Since that time, the Network's understanding of community foundation capacity, leadership, and resources has advanced and our overall membership now includes 31 community foundations (representing one-third of the Network's overall philanthropic membership). This second edition of *Leading the Field* provides further detail regarding the progress made thus far by community foundations engaging in issues pertaining to sustainability, land-use planning and policy, and quality of life.

The community foundations profiled here often approach their work from various issues reflected within the suite of smart growth and quality of life concerns, which include public health; education; transportation; economic and workforce development; regional, neighborhood, and racial equity; water and air quality; energy; food security; and agricultural and environmental protection, to name a few. Their stories reflect work they have accomplished as grantmakers, conveners, educators, advocates, and initiators. We hope that other community foundations—as well as the full philanthropic community—are inspired to learn from the examples included here and replicate these and other initiatives in their communities.

On behalf of the members, board, and staff of the Network, we are pleased to share these stories with you. We are honored to associate with the community foundation leaders responsible for this work and are continually amazed by their commitment, resourcefulness, and imagination. We look forward to continuing to support and document best practices among community foundations and to sharing the results with our philanthropic colleagues and friends. Further, we welcome your advice, input, and involvement in this work.

L. Benjamin Starrett
Executive Director
Funders' Network for Smart Growth and Livable Communities
Fall 2004

Introduction

Community foundations across North America are beginning to recognize that many of the issues they care about—from disadvantaged children and families to public education to economic opportunity to housing and beyond—are rooted in how their communities are growing. These foundations are a part of local efforts to create better urban and suburban neighborhoods that, among other things: provide housing opportunities affordable to everyone; give children the option to walk and bike safely to school; and preserve **open space**[1] and farmland.

Many of these foundations are extending their repertoire beyond grantmaking in order to have a greater impact on local, regional, and statewide decisions that shape the future of the communities that they serve. The roles these foundations play include convening public officials and other key players in the development realm, educating community members, and being at the table when land-use and transportation decisions are being contemplated. Community foundations that cover rural, suburban, urban, and metropolitan areas all are helping their regions grow smarter and become more livable.

This report—a sequel to the Funders' Network for Smart Growth and Livable Communities' 2001 publication, *Leading the Field*—profiles over two dozen North American community foundations active in this work. Each has initiated an innovative program that seeks to shape the future of their communities. Following this introduction are case study examples detailing these efforts. The publication concludes with advice from leaders in the field and possible steps that other community foundations can take to commence work in their own communities.

What is Smart Growth? What Makes a Community Livable?

According to planners and advocates, "**smart growth**" is a term used for a bundle of growth and development strategies that revitalize central cities and older suburbs without displacing existing residents, support and enhance a balance of transit options, promote walking and bicycling, and preserve open space and agricultural lands. The term "livable communities" is used to describe the desired outcome of smarter growth development strategies. Attributes of livable communities include the ability of residents and workers to reach common destinations without a private automobile because of the existence of shaded sidewalks and safe bikeways, a mix of land uses, and, where such facilities exist, an orientation to nearby transit stations. Other attributes of a livable community are healthy neighborhoods, good public schools, plenty of housing affordable to the local workforce, parks and other recreational facilities, engaged citizens, and other features that residents and workers consider important to their quality of life. Ultimately, smart growth development is characterized by strategies that improve all three "E's": environment, **equity**, and economy.

For some community foundations, becoming involved in "smart growth" work is a gradual process, while others are initially introduced to these issues in the context of a specific opportunity or catalytic event. Regardless of how

[1] Throughout the publication, the first reference to terms that are defined in the glossary are highlighted in bold. Turn to the section that begins on page 74 for a full definition.

it begins, it is important not to get caught up in the labels. Whether it is called smart growth, livable communities, quality growth, sensible growth, or fair growth (or something else!), the bottom line is to help assure that communities grow and develop in ways so that everyone benefits. Important steps include helping residents to have meaningful opportunities to participate in planning processes, encouraging public officials to undertake planning with an eye on the big picture, and working to assure that development benefit the entire community, not just single interests.

Although smart growth and **livability** are most evident on the ground in local settings, the forces that shape these physical characteristics are often regional in nature or found in state or national policies. As the nation's suburbs grow and as commutes lengthen, one community's growth decisions increasingly impact quality of life in neighboring cities and beyond. For this reason, many community foundations active in growth and development are creating regional collaboratives with other organizations working to improve quality of life in their communities, including other funders.

What Community Foundations Can Do

Early forays by community foundations into the regional growth and development arenas include funding nonprofit organizations working in these areas, convening and facilitating stakeholder groups in community planning processes, and getting involved more directly in shaping local, regional, and state policies that affect development patterns.

Today, North American community foundations are active in these areas and more. There are foundations focusing on land preservation in rural areas, on converting suburban strip malls into **mixed-use** development, on revitalizing downtown districts, and on constructing **affordable housing**. Others are developing data that can help their regions quantify quality-of-life goals, track progress toward meeting them, and advocate for public policy that favors development patterns that will help accomplish these goals. Education —of decision-makers, the general public, and other community foundations—is another arena in which community foundations are becoming more sophisticated. Still others have found their niche in economic development, environmental protection, or civic engagement. In all cases, though, community foundations are learning that involvement and consideration of all perspectives —business, environmental, and social equity—is essential for the success of any program.

Although community foundations are extending their role far beyond grantmaking, the majority of efforts begin with convening. In most areas, there is no organization better suited to this role than the local community foundation, due to its knowledge of local issues and reputation as a neutral, even-handed leader. It is important to understand, however, that community foundations that do this work typically are not "neutral" in the classic sense of the word. They do have a point of view, which is that their community needs to make better decisions regarding how it grows. But because the community foundation is perceived as fair and because it looks out for the interests of the entire community, it can provide a neutral forum where community stakeholders can come to consensus on growth and development issues.

Community Foundation Profiles—Themes in the Report

Twenty-five community foundations in the United States and Canada are profiled in this publication. Some have been involved with shaping the communities that they serve for years, while others are new to the field. Each is involved with the Community Foundations Leadership Project (CFLP) of the Funders' Network for Smart Growth and Livable Communities—a project launched in 2000 to nurture community foundation leadership within the smart growth and livable communities movement and the Funders' Network. The foundations profiled in this report range in age from the oldest foundation in North America (The Cleveland Foundation, founded in 1914) to one of the youngest (Essex County Community Foundation, founded in 1999). Their assets range from $5 million to well over $1 billion. The proportion of these assets that are discretionary or unrestricted vary similarly, from just 5 percent to almost 100 percent.

In terms of initiating their growth-related efforts, the community foundations included here fall into two camps: those that intentionally got involved and those that found themselves involved by virtue of their historic activities and/or interests. The former—like New Hampshire Charitable Foundation and the Coastal Community Foundation of South Carolina—typically began by convening key stakeholders and by doing a great deal of listening to learn all sides of local issues. On the other hand, the latter—East Bay Community Foundation and The Minneapolis Foundation, for instance—while still relying on convening, began with more familiarity about growth-related issues.

Another theme that these profiles reveal is that most community foundations are involved with efforts to influence growth and development at the regional level, but in quite different ways. For some—the Community Foundation for Greater New Haven and East Bay Community Foundation, for example—this means balancing inner-city revitalization efforts with involvement in open space preservation. In other cases—like Essex County Community Foundation and Rochester Area Community Foundation—this means working to influence region-wide policies or educating local governments, developers, environmentalists, and others throughout the regions that they serve.

The way in which community foundations fund their growth-related efforts also varies considerably from foundation to foundation. For instance, New York Community Trust not only self-funds its work, it also uses its assets to bring neighboring community foundations to the table to address common regional challenges. Creating a funding collaborative is another mechanism that foundations like The Greater Cincinnati Foundation use to bring together multiple grantmakers to work toward shared goals. Others, like the Rochester Area Community Foundation, rely on supporting foundations (also known as supporting organizations in some cases) to fund their growth-related work. And other efforts, although a program or an initiative of the community foundation, depend primarily on outside funding. What these community foundations have in common is a need to optimize the work they can do with each dollar, regardless of the source.

Interestingly, these interviews reflect a remarkable uniformity in terms of longevity—how long a particular foundation has been involved in improving quality of life in their community by influencing growth and development patterns and decisions. No effort is even a decade old; most were conceived between 1996 and 2000. This timeframe is not a coincidence; rather it is consistent with the dawn of the smart growth movement nationwide. It also bears mentioning that no community foundation interviewed has ceased operating its growth-related programs, except in a few rare cases where outside funding became unavailable. Although most of these efforts are new relative to other community foundation efforts, they require a commitment much longer than the typical three-year grant cycle to which many foundations are accustomed.

Other Resources

Reading about the experiences of community foundations involved in growth and development can be a powerful motivator to similar organizations contemplating new and innovative ways of sustaining and improving quality of life in the communities and regions they serve. Beyond this compendium of such profiles, the Funders' Network for Smart Growth and Livable Communities has published a number of resources that illustrate the strong links between the manner in which our regions are growing and the challenges community foundations across North America have been trying for decades to address. These include "translation papers" on topics including civic participation, the arts, and agricultural sustainability, and the recently released *Building Better Communities: A Getting Started Resource Guide for Community Foundations.*

Using this Report

The goal of this report is to begin to document practices among place-based grantmakers working on the suite of smart growth and livable communities issues. The profiles that follow are organized alphabetically by organization, according to geographic regions (Northeast, Mid-Atlantic, South, Midwest, West and Canada). Each includes standard information for comparative purposes regarding the year the foundation was founded, its total assets, the percent of unrestricted funds, and the geographic area served, followed by contact information. Please note that the profiles represent the perspectives and beliefs of the staff or board members who were interviewed at each community foundation—any conclusions drawn regarding the success or failure of these initiatives are based on these conversations. The report includes a directory of community foundation contacts who have offered to be of assistance on particular topics to their colleagues in the field who are interested in learning more. It concludes with a glossary of terms related to land-use planning, smarter growth development practices, and the livable communities movement (the first reference to any glossary term is highlighted in the main text).

Northeast

The Boston Foundation

The Community Foundation for Greater New Haven

Essex County Community Foundation

New Hampshire Charitable Foundation

New York Community Trust

Rochester Area Community Foundation

The Boston Indicators Project: Using Indicators to Drive and Measure Change

The Boston Foundation believes that communities need data at the neighborhood, city, and regional levels to allow them to identify quality of life goals and to track progress toward those goals. Since the 1990s, The Boston Foundation has taken on the challenge of developing this data to aid planning and advocacy organizations trying to track change and democratize public data. Boston Foundation donor Cathleen D. Stone conceived the Boston Indicators Project when she was chief of environmental services for the city of Boston and was seeking to develop sustainability **indicators** for Boston.

A special feature of the website is a "cross-cut filter" that allows measures to be accessed by overarching topics such as sustainable development (or smart growth), children and youth, and race and ethnicity.

The Boston Indicators Project was initiated in 1997 as a partnership between the city's Sustainable Boston Initiative and The Boston Foundation. The Foundation—headed by former LISC[2] President Paul Grogan since mid-2001—coordinates the Project in partnership with the city of Boston and the Metropolitan Area Planning Council (the regional planning agency). The project also partners with local academic institutions and continues to engage people across sectors and communities.

Within several months of its 1997 inception, the Indicators Project had attracted additional participants such as the Boston Police Department, U.S. Environmental Protection Agency (EPA), and U.S. Department of Housing and Urban Development (HUD), as well as activist parents, environmentalists, and academic experts. Out of that process—which eventually included more than 300 people—emerged a comprehensive indicators framework in ten sectors: civic health, cultural life and the arts, economy, education, environment, housing, health, public safety, technology, and transportation.

Products of the Boston Indicators Project Once participants agreed on the framework and a vision for each sector, they refined goals for each and identified measures of progress based on available data. The first formal Boston Indicators Report, *The Wisdom of Our Choices: Boston Indicators of Progress, Change and Sustainability,* was released at a major civic event in late 2000. The 2002 report, *Creativity and Innovation: A Bridge to the Future*, was released as a dynamic and interactive website: www.bostonindicators.org.

A special feature of the website is a "cross-cut filter" that allows measures to be accessed by overarching topics such as **sustainable development** (or smart growth), children and youth, and race and ethnicity. For example, sustainable development draws data from

Founded: *1915*

Total Assets: *$630 million*

Percent Unrestricted: *approx. 50 percent*

Geographic Area: *Greater Boston, with a focus on city of Boston*

[2] Local Initiatives Support Corporation (LISC)

health, housing, transportation, and the environment, encouraging a holistic view and helping communities to see themselves in a regional context. The relationships among issues driving **sprawl** such as educational quality, housing affordability, racial segregation patterns, and transportation can thereby be seen more clearly, allowing for more systemic, strategic, and collaborative responses.

Current Work The Boston Indicators Project currently is developing an online regional data repository in partnership with the Metropolitan Area Planning Council. For its 2004 report, the Project is working to add new interactive features, measurable goals for 2030 including intermediate benchmarks, and a shorter-term shared civic agenda. For example, it will be difficult to succeed in 21st century regional economies without a good education. Education experts agree that whether or not a third grader can read at the third grade level is in most cases an early indicator of future academic success. That indicator could be used to align and support work in maternal health, early childhood education, educational quality, and alleviation of childhood poverty—all precursors to success in third grade reading.

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Funding the Boston Indicators Project The Project is primarily funded by The Boston Foundation, with continued funding from local foundations, including, since its inception, the James M. and Cathleen D. Stone Foundation, located at The Boston Foundation, as well as a major anonymous grant and support from partners such as the National Neighborhoods Indicators Project.

Beyond Boston The Boston Foundation offers a license for the website interface and architecture of its indicators framework to other community foundations that have taken on the challenge of developing indicators. A number of community foundations across the country are adapting or adopting Boston's indicators framework. The federal Government Accountability Office (GAO)[3] is using the framework to help inform the development of national indicators and visitors from Canada, Brazil, and Australia are examining the Project for potential use as a model for their nation's work in this area. In 2003, the Boston Indicators Project received an international award from the Tech Museum in Silicon Valley for "using technology to serve humanity."

The Boston Foundation believes that other community foundations in the United States could contribute to the further development of useful indicators by thinking about the sorts of measures that would aid their work. This information could facilitate collaborative dialogue among community foundations on many issues and could allow advances made in one part of the country to help communities elsewhere.

[3] Formerly known as the General Accounting Office, GAO is an agency that works for Congress and the American people—Congress asks GAO to study the programs and expenditures of the federal government. It is commonly called the investigate arm of Congress or the Congressional watchdog and is independent and nonpartisan (source: www.gao.gov).

Statewide Smart Growth through the Lens of Economic Prosperity

Assuring a strong economy across the entire New Haven region is a framing priority for the Community Foundation for Greater New Haven's (CFGNH) work. This means ensuring that funded efforts consider the potential impact on economic development throughout this region of 20 towns and 600,000 people. Furthermore, CFGNH strives for complementary, balanced impact across community sectors. For example, when the Foundation makes a grant to acquire open space, it also funds a **brownfield** clean-up project. When it sponsors a suburban affordable housing effort, it also makes an urban economic development grant that encourages residents of means to remain in the city.

The Community Foundation for Greater New Haven believes that regional cooperation is essential to successfully tackle challenges to urban and suburban economic development.

Regional Cooperation, Statewide Impact

The Community Foundation for Greater New Haven believes that regional cooperation is essential to successfully tackle challenges to urban and suburban economic development. In addition, the Foundation supports efforts to change state policies to facilitate economic development because it recognizes the outsized impact that state law and regulations have on the regional economy. The Foundation's strategic approach includes funding and participating in two important region-wide processes that seek to improve regional cooperation in the greater New Haven area and affect state policy.

The Regional Institute The Regional Institute was created in the mid-1990s by a bank president who understood that maintaining and expanding the region's economic competitiveness would require cooperation among municipalities and organizations throughout Connecticut. The Institute is funded by CFGNH's unrestricted funds and through corporate contributions. It has brought in national experts to identify effective strategies to benefit the New Haven region and other Connecticut regions and uses these studies to influence state policy.

For instance, based on a Regional Institute recommendation, the Connecticut legislature recently created a new "Transportation Strategy Board," thus removing for the most part transportation policymaking from the Connecticut Department of Transportation. This move has resulted in a decision-making process that goes beyond transportation considerations alone to include municipal land use and economic development priorities. This very successful effort emboldened the Institute to encourage more state policymakers to use the Institute as a vehicle to achieve other land-use related policy changes.

Founded:
1928

Total Assets:
$220 million

Percent Discretionary:
approx. 50 percent

Geographic Area:
20 towns in Greater New Haven and Lower Naugatuck Valley, Conn.

CenterEdge Another CFGNH-funded effort, CenterEdge, has its beginnings in the Office of Urban Affairs (OUA) of the Archdiocese of Hartford. In the late 1990s, the Archdiocese was exposed to political economist Myron Orfield's work on "metropolitics," which led it to the conclusion that political empowerment should form the basis of its efforts to achieve social equity. In 2000, OUA approached the Community Foundation for Greater New Haven to fund an effort to educate church congregations throughout the region about the relationships between sprawl development and poverty and, hopefully, to create a grassroots organizing movement as a result. The Foundation overcame its doubt about supporting a statewide grassroots effort on this specific issue for the first time, recognizing that CenterEdge's effort, successful or not, represented an important complement to the work of the Regional Institute.

During the same period, CFGNH and others invited Orfield to study the greater New Haven region. By 2003, Orfield concluded in a study that covered all of Connecticut that, as in other metropolitan areas across the United States, greater New Haven's urban problems are no longer limited to urban areas. In order to solve them, urban, suburban, and rural areas need to work together to find solutions that work for everyone. Orfield suggested that either revenue-sharing among municipalities, or redirecting property taxes to the state, which would then reallocate them to municipalities based on a formula, would allow local governments to locate development where it makes the most sense rather than continuing to let developers control the region's future by building in the highest bidding jurisdiction.

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** Available as a resource on the subjects of regional cooperation and economic development.*

Statewide Approach, Regional Support The Archdiocese is using these findings in a gradual grassroots campaign to educate the general public about the need for regional cooperation and, eventually, for statewide solutions to economic development, transportation, and other quality of life challenges in the greater New Haven region. Its objective is to create a movement strong enough to give locally elected officials sufficient political cover to allow them to give up some level of local control to accomplish these goals.

The Foundation has initiated efforts to engage its donors and institutional funders around major community priorities, including growth-related ones like land use, economic development, the environment, health, and other quality of life issues in the region. Over time, the hope is that individuals, the Foundation, and other funders will be able to leverage each other's resources where needed to support efforts like the Regional Institute and CenterEdge.

The Essex County Forum: Promoting Smart Growth through Leadership

Despite Essex County Community Foundation's youth (it was founded in 1999) and that its endowment is just $5 million, the Foundation has proven that any community foundation—regardless of age or size—can serve as a catalyst for better planning in its community. By serving as convener, collaborator, and facilitator—if not always the funder—the Foundation is an outspoken advocate for expanding philanthropy in the area of smart growth and conservation issues.

By serving as convener, collaborator, and facilitator—if not always the funder—the Foundation is an outspoken advocate for expanding philanthropy in the area of smart growth and conservation issues.

Regional Planning Unlike the other New England states, there is no state planning agency in Massachusetts to guide development, nor are there effective county level governments to lend a regional perspective to planning decisions. There is a strong tradition of home rule and very few partnerships across municipal boundaries. An Essex County Community Foundation (ECCF) trustee who believed in the need for a regional approach to managing growth and development initiated the Foundation's smart growth efforts. Municipalities and nonprofits alike have supported its efforts to fill the leadership vacuum in this arena.

Essex County Forum: Smart Growth for Livable Communities The Foundation's Essex County Forum provides leadership in promoting smart growth in Essex County, which has no other organizations focusing on such issues. The Forum's goal is to promote a greater understanding of the full spectrum of environmental, economic, social, and aesthetic issues that affect future development of Essex County's communities.

The Forum is achieving this goal by creating an environment whereby people with different interests, expertise, and perspectives can join in an ongoing dialogue about the county's collective future. Open space, watershed and housing advocates, historic preservationists, brownfields redevelopers, developers, and others help define the Forum's path and support its work.

The Essex County Forum has a vision of vibrant village centers and economically self-sufficient cities surrounded by working landscapes and biologically diverse open spaces. It hopes that innovative planning using regional perspectives can discourage development that would erode the area's quality of life.

The Essex County Forum offers educational and informational events—including seminars, workshops, conferences, roundtables, networking breakfasts, and demonstration projects. It serves as a conduit for building partnerships among organizations, hosts a web-based town meeting designed for dynamic networking and resource sharing, and

Founded:
1999
Total Assets:
$5 million
Percent Discretionary:
30 percent
Geographic Area:
Essex County, Mass.

works to raise public awareness about "smart growth." The Forum also provides news and information about smart growth—in print and on the web—for land-use planners and interested decision-makers.

Smart Growth Circuit Rider An example of the Forum's proactive approach is its employment in 2004 of a "Smart Growth Circuit Rider"—a professional planner available to all 34 cities and towns in Essex County—to offer hands-on technical assistance to planners, **zoning** boards, and town administrators. The Circuit Rider aids government's ability to manage new development by providing information, maps, model bylaws, and any other materials communities need to learn the principles and processes that will ensure development consistent with smart growth goals happen in Essex County. Local communities have been so responsive that, in addition to one-on-one appointments, the Circuit Rider is offering sub-regional meetings on common topics. These convenings are having the added benefit of bringing staff from multiple jurisdictions together to share best practices and to otherwise learn from each other.

Future Work To date, the majority of Forum work has focused on convening a regional dialogue about smart growth, creating smarter urban development patterns, and using planning mechanisms to preserve open space. Staff plans to begin addressing social equity issues in Essex County by working with affordable housing advocates to expand the county's stock of housing affordable to more income groups and bringing together open space and affordable housing constituents.

In addition, a number of existing Essex County land trusts have expressed an interest in the concept of **transferring development rights** (TDRs)—exchanging the right to develop rural land outside of the developed footprint for the right to build more densely in an urban area. At the moment, only two municipalities in Massachusetts use this arrangement; many of the rest fear the complexity of administering such programs. The Forum plans to work with planning and public policy graduate students at nearby Tufts University to create a TDR toolkit that would describe examples of successful programs, lay out various TDR options, and provide guidance to local governments on how to administer them.

Funding The Essex County Forum is a self-funded program of the Essex County Community Foundation. It has assembled $300,000 towards an endowment for the Forum and, in addition, needs to raise $100,000 annually for the salaries of the Forum director and circuit rider, conference series, website updates, outreach materials, and an annual conference.

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Livable New Hampshire: Leading a New Statewide Movement

New Hampshire Charitable Foundation (NHCF) has become a key player in smart growth discussions throughout the state through its in-house Livable New Hampshire program, which coordinates and consolidates smart growth-related grantmaking and convening activities.

It was the Foundation's grantees who originally introduced its staff to the concept of "smart growth." At the time—late 2001—NHCF realized that many of its grants were consistent with the overall framework of smart growth. From land conservation to innovative building practices to community economic development, the Foundation was supporting programs across the state aimed at shaping the way New Hampshire was growing.

Although the Foundation's interests in this area were chiefly environmental, Livable New Hampshire has broadened the conversation beyond land conservation to include many smart growth issues, including affordable housing, transportation policy, health and active living, and social equity.

The state—which has no sales or income tax—relies on property taxes for local and state revenue. This unusual fiscal situation is given credit for attracting increasing numbers of new residents and, ironically, for an aversion to new residential development, because there is a perception that housing demands more services per tax dollar than commercial or industrial land uses.

By 2002, NHCF staff was routinely convening grantees and other private and public sector stakeholders to discuss how New Hampshire's growth could be channeled in a way to improve their communities. Realtors, public health professionals, developers, affordable housing advocates, and environmentalists met to discuss the relationships between their individual issues, opportunities for collaboration, and how they could together help improve quality of life for all New Hampshire residents.

Livable New Hampshire In 2003, New Hampshire Charitable Foundation created Livable New Hampshire with a mix of field-of-interest and discretionary funds, as well as support from other private foundations: the Jessie B. Cox Charitable Trust and the Hoffman Family Foundation. Although the Foundation's work in this area began from its environmental work, Livable New Hampshire has broadened the conversation beyond land conservation to include many smart growth issues, including affordable housing, transportation policy, social capital, health and active living, and social equity.

Founded:
1962

Total Assets:
$260 million

Percent Unrestricted:
80 percent

Geographic Area:
State of N.H. plus Greater Piscataqua, which extends into Maine; and Upper Valley, which extends into Vermont

Through its convening work, NHCF has emerged as a key smart growth connector in the state. As a result, the New Hampshire Department of Transportation (DOT) has asked NHCF to play important roles on two major transportation projects. One involves convening and facilitating an advisory group of state opinion leaders to help the DOT as it embarks on the state's first comprehensive long-range transportation plan. Rather than simply writing a plan to satisfy federal requirements, the agency is approaching this as an opportunity to institutionalize linking land-use planning and transportation projects. The group convened by NHCF will help guide development of the plan and build support for policies that recognize the connections between transportation and growth in the state. The Foundation also is working closely with DOT on a program to bring resources to communities that will be impacted by a major highway widening project. The Foundation is helping convene stakeholders to develop a unique technical assistance program to help the communities deal with increased growth from the project and to work better as a region to preserve quality of life.

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** Available as a resource on the subjects of convening and policy work.*

Most recently, New Hampshire's Governor launched his own smart growth initiative within the Office of Energy and Planning. Although this effort has no regulatory authority or resources of the magnitude of the DOT, the Governor's move reinforces the message that the highest levels of government understand that New Hampshire's future depends on controlling the suburban sprawl and increasing land consumption that characterize the state's recent growth patterns. Foundation staff is working with the Office of Energy and Planning to ensure collaboration on smart growth issues, particularly in the areas of affordable housing and transportation.

People across the state of New Hampshire, including NHCF's donors, realize that building better communities is key to maintaining quality of life in their state. Donors and other private and public sector observers alike are optimistic that the reputation of the Foundation and its balanced approach to growth and development issues make Livable New Hampshire a critical program to support.

As the issues being tackled by Livable New Hampshire become more controversial and require direct legislative advocacy, New Hampshire Charitable Foundation may take further steps to incubate a nonprofit advocacy group that can more aggressively pursue a smart growth policy agenda.

The Long Island Sound Initiative: Developing a Partnership of Community Foundations Using Grantmaking

Long Island Sound, sandwiched between New York and Connecticut, is recognized as one of the nation's premier estuaries. New York Community Trust (NYCT) has funded the Long Island Sound Stewardship Initiative to help protect the estuary from future development and has invited community foundations in neighboring Connecticut to participate in the effort.

Apart from the environmental benefits of protecting species habitat and open space resources of the Long Island Sound, through the Initiative, the Foundation aims to entice Connecticut community foundations to join the effort.

Responding to recommendations from a 1994 comprehensive plan for the Sound, three nonprofit organizations came together in 1999 to identify ways to preserve, restore, and increase public access to the Sound's coastal areas and open space. The goal of these three groups (known collectively as Long Island Sound Partners) is to set up a network of protected sites—including natural areas and developed parks—by claiming the few parcels of land that have not been developed and by reclaiming other key sites. Over the next few of years, the Partners brought in New York and Connecticut state agencies and the U.S. Environmental Protection Agency and in 2001 approached New York Community Trust for funding.

Long Island Sound Initiative Apart from the environmental benefits of protecting species habitat and open space resources of the Long Island Sound, through the Initiative, the Foundation aims to entice Connecticut community foundations to join in the effort. Toward that end, in 2003 and 2004, the Foundation convened meetings of half-a-dozen Connecticut community foundations to identify ways to get them involved in addressing the challenges facing the estuary, possibly using a portion of the money NYCT has allocated to the Long Island Sound Stewardship Initiative. New York Community Trust's strategy is to give its neighboring community foundations the resources with which to gain the experience working on environmental issues they will need to initiate and sponsor other environmental efforts of regional significance. Although it is too early to assess the effectiveness and longevity of this partnership, these efforts already have spawned other attempts to think regionally in the Tri-State area around planning, transportation, education, and the like.

Funding the Initiative The Long Island Sound Partners received three grants from New York Community Trust in 2001, 2003, and 2004. Other support for the Long Island Sound Stewardship Initiative comes from the U.S. Environmental Protection Agency.

Founded:
1974
Total Assets:
$1.7 billion

Percent Discretionary:
25 percent
Geographic Area:
The 5 boroughs of New York City

The Trust's financial support of the Long Island Initiative comes from its Environment grants program, which addresses climate change, biodiversity and habitat protection, and environmental health issues nationally. In the New York metropolitan region, the grant program's objectives are to preserve and restore habitat, promote a more sustainable transportation system, protect open space and drinking water resources, and redevelop brownfields. (Note: Because strategies that support smarter growth policies and practices help to achieve a number of these objectives, this program also supports the Funders' Network's Community Foundation Leadership Project.)

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Sprawl without Growth: Concentrated Poverty as Cause and Effect of Sprawl

In 1998, in response to realization of the relationship between the profound poverty afflicting Rochester's urban areas and the region's dispersed development patterns, Rochester Area Community Foundation (RACF) took under its wing a new organization designed to curb sprawl and encourage reinvestment in the city.

According to the Brookings Institution, the total amount of urbanized land in upstate New York grew by 30 percent between 1982 and 1997, while its population grew by less than three percent.[4] This trend is unmistakable in Greater Rochester, which has seen the developed footprint grow considerably, leading to a tremendous loss of population in the city of Rochester and loss of open space and agricultural land in suburban and rural areas of the region. Given little population growth, the effect of developing the periphery of the region has been to empty out the urban center, leaving behind those families who can neither access nor afford suburban housing and jobs. Today, almost 90 percent of Rochester city school kids qualify for free or reduced price lunches, a common measure of childhood poverty.

In the mid-1990s, Rochester Area Community Foundation began to take the first steps towards sensitizing its board to issues related to sprawl by putting before them a proposal to fund the publication and distribution of a locally-produced pamphlet on sprawl. This decision marked one of RACF's board's first divided votes, but, after lengthy discussion, the trustees agreed that it would be appropriate for the Foundation, without taking a particular position, to publish the pamphlet in order to engage the community in the issue.

Common Good Planning Center In 1997, rather than soliciting contributions, Princeton University asked its alumni to celebrate the school's 250th anniversary by giving something back to their communities. The Rochester area chapter of the alumni association chose to bring in speakers from around the country for a lecture series on issues facing the region, such as urban disinvestment, racial polarization, disappearing open space and farmland, and the decline of community.

Among the area residents who attended the series—called "Metropolitan Rochester and the Common Good"—were two Rochester Area Community Foundation donors, Harold and Joan Feinbloom, who began to understand that the concentrated urban poverty they had been trying to alleviate is both a cause and effect of sprawl. They felt that this was an area in which they could do some good. With other lecture series attendees, the Feinblooms conceived the idea to launch a new organization aimed at curbing sprawl and reinvesting in the inner city. After initial trepidation that the development issues that would be addressed by this Common Good Planning Center (CGPC) would be too controversial for the Foundation to take on, RACF agreed to be the Center's fiscal sponsor with funding from the Feinblooms' supporting foundation.

Since its inception in 1998, the Common Good Planning Center has kept the issues of regional land use and development in the public

Founded:
1972

Total Assets:
$160 million

Percent Discretionary:
13 percent

Geographic Area:
The 6 counties that surround and include Rochester, N.Y.

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[4] *Sprawl Without Growth: The Upstate Paradox,* The Brookings Institution, October 2003.

spotlight. The region's first council of governments has formed, in addition to numerous inter-municipal agreements. There are more towns in the region cooperating with each other than ever before and an increasing number are reinvesting in their cores by developing town centers and preserving open space. In addition to educating the community, the Center is empowering supporters of development patterns that enhance quality of life and serves as a resource for information they need to affect change in their spheres of influence.

The Common Good Planning Center has shown Rochester area residents how development in other parts of the region affects their neighborhoods and municipalities. Further, the Center has been able to illustrate how the suburbs and rural areas are suffering from the costs of growing too quickly while urban areas are suffering from the loss of population and tax base. Throughout the region, the Center has been instrumental in getting these issues on the community's radar screen. Examples include newspaper editorials on land-use and development issues and a comprehensive website and monthly electronic newsletter (www.cgpc.org). The Center also has assisted many local government officials and citizens with matters related to land use and development. For example, the Center assisted a citizens group concerned about a proposed new New York State Thruway exit that would open the door for sprawl among the region's best farmland (the project fizzled largely because of this citizen concern). Another example: currently, the Center is working with the Finger Lakes Land Trust to help the citizens and government in the rural town of Jerusalem to better balance ecology and economy. The Center also bestows a twice-annual "Uncommonly Good Award" to highlight development projects and initiatives in the region that exemplify "smart growth" and improve quality of life. The last award was given to the Irondequoit Town Center project, located in an inner-ring suburb with no downtown district. The town's government and citizens have worked in concert to advance the creation of a vibrant center, and now the Common Good Planning Center is helping the town to implement their Town Center plans.

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** Jennifer Leonard is available as a resource on the subject of supporting an initiative.*
** Evan Lowenstein is available as a resource on the subject of educating a community about the costs of sprawl.*

The Joan and Harold Feinbloom Supporting Foundation of the Rochester Area Community Foundation funds 40 percent of the Common Good Planning Center's annual budget; roughly one-third comes from RACF. One of the Center's near term goals is to diversify its funding.

Relationship to Rochester Area Community Foundation The Rochester Area Community Foundation understands that regional development patterns are at the root of many of the issues (e.g., urban poverty) that it cares about. Although the Common Good Planning Center is a separate entity from the Foundation, with its own board and offices, the connections between the two are known in the community. This has cost the Foundation some neutrality but, rather than driving away donors, RACF staff feels that its support of the CGPC has attracted donors who were first introduced to the Foundation through the work of the CGPC.

Mid-Atlantic

Healthy Neighborhoods, Inc.: Building on Existing Strengths

In addition to helping Baltimore's poorest districts, Baltimore Community Foundation (BCF) is leading a pioneering effort to help so-called "cusp" neighborhoods before they decline. The Foundation's Healthy Neighborhoods Initiative (HNI) is structured to build on the existing social fabric in these communities by helping homeowners rehabilitate and build equity in their property.

One of the most exciting accomplishments of the Healthy Neighborhoods efforts is the introduction of a new language and philosophy into Baltimore's community development system. As a result, a new generation of leader is emerging in Baltimore that understands the need to go beyond traditional efforts that built as many housing units as possible.

Investing in Existing Strengths In 1999 and 2000, a number of nonprofit groups came together to discuss how to stimulate private and public investment in Baltimore's "middle" neighborhoods—those that were neither visibly declining nor were the city's finest. Many of these communities, while still functioning, suffered from terrible predatory lending problems, wherein lenders entice cash-poor homeowners to use their homes as collateral for high interest loans. In fact, one such area had the highest foreclosure rate of any ZIP code in the country.

The groups concluded that, although resources were badly needed in the city's poorest neighborhoods, it was a losing strategy for the city of Baltimore to invest all of its redevelopment funds in the areas with the worst problems. During the same period, a new mayor was elected with an agenda of building on the city's existing strengths.

Role of Baltimore Community Foundation
Coincident with these activities, Baltimore Community Foundation's president and trustees were developing a new focus for community development investments, one of its priority giving areas. It was interested in regional work and, in part due to former Governor Parris Glendening's leadership in growth and development issues, understood the importance of maintaining older urban neighborhoods to the health of the region.

The Foundation began working with city government and the nonprofits that had initiated the groundbreaking cusp neighborhood work. Together they were able to secure $1 million from the Maryland State Legislature to capitalize an initial loan fund for the newly created Mayor's Healthy Neighborhoods Initiative. Other partners in the new program included the U.S. Department of Housing and Urban Development, the state, 13 lending institutions, six other foundations, and the participating neighborhoods. The collaborative group worked to reorient the perspective of its community development investments from fixing problems to building on strengths. For instance, rather than appointing a sanitation committee to clean up trash in a given area, a gardening group was organized to beautify the space.

Founded:
1972

Total Assets:
$115 million

Percent Discretionary:
30 percent

Geographic Area:
City and county of Baltimore

In 2000, under the leadership of BCF, the pilot project called the Mayor's Healthy Neighborhoods Initiative was launched to test whether there was demand for rehab funding and support services in these neighborhoods. The Foundation designed a loan application and review process and raised funds to augment the state's contribution. A loan fund was developed which offers existing property owners in six—and later seven—neighborhoods 3 percent loans to rehabilitate their homes and tries to influence potential homeowners to invest in these communities with below-market rate purchase loans and access to the rehab loan pool. Neither of these loan vehicles has an income restriction—minimum or maximum—which has resulted in a broad mix of borrowers. A key component of the program is an emphasis on small block projects aimed at building social fabric among and restoring confidence of neighbors. Beyond preventing these neighborhoods from declining, the program has the added benefit of increasing property values, thus increasing homeowners' equity and the city's property tax rolls.

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** Available as a resource on the subject of leadership of a citywide municipal program.*

Results and Next Steps In late 2002, BCF made a grant to the Baltimore Neighborhood Indicators Alliance for an evaluation of the pilot project. The evaluation showed that the Healthy Neighborhoods program was having its desired effect, although not consistently across neighborhoods. It identified the availability of a strong community partner—either a community development corporation or other group—as key to the program's success in a given neighborhood. Further, the evaluation showed that the success of the positive social fabric building activities helped to undergird the lending activities, but that low-interest rehab and purchase loans are not sufficient to rescue blocks that already have witnessed a certain degree of deterioration.

Based on the results of this evaluation, Baltimore Community Foundation reaffirmed its ongoing commitment to the program. It created a supporting organization, Healthy Neighborhoods, Inc., as a vehicle to attract funding, to streamline the lending process by using the lessons learned in the early years of the endeavor, and to maintain BCF's control of the program. The Foundation has recruited corporate leaders to serve on the board of directors of the new supporting organization and has an informal advisory committee comprising representatives of participating neighborhoods.

One of the most exciting accomplishments of the Healthy Neighborhoods efforts is the introduction of a new language and philosophy into Baltimore's community development system. As a result, a new generation of leaders is emerging in Baltimore that understands the need to go beyond traditional efforts that built as many housing units as possible. These community builders are learning to use marketing and the existing social fabric as tools to enhance older neighborhoods.

Donor Response Apart from Baltimore Community Foundation's in-kind staff and office contributions, it has dedicated unrestricted and field of interest funds to Healthy Neighborhoods, Inc. Donors like the fact that the Foundation is taking the lead on this effort and that it has measurable outcomes, something that is increasingly important to younger donors.

Educating about Energy: Using the "Recycling Model" to Influence a Community's Behavior

As a result of a rate settlement case in 1999, Berks County Community Foundation (BCCF) received a $5.7 million contribution from its local utility company (Metropolitan Edison). In 2000, the Community Foundation received a subsequent contribution of $2.5 million. With this funding, BCCF created the Metropolitan Edison Company Sustainable Energy Fund (Met Ed Fund), which makes grants, loans, and equity investments to support energy conservation, environmental projects, and renewable energy projects.

The Foundation works to strengthen the link between renewable energy, energy conservation, and sustainable development in Berks County.

The Foundation works to strengthen the link between renewable energy, energy conservation, and sustainable development in Berks County. It believes that by increasing attention to how we develop energy resources, preserve land, and build—through greater use of renewable energy sources, energy efficient design, and green building techniques—and where we build—in locations that reduce dependency on the single-occupant vehicle—individuals, organizations, and communities can become more energy independent while saving money.

Energy Conservation in the Schools One of the programs of which BCCF is proudest is an ongoing effort to teach middle school students about energy conservation. Youth Energy School (YES)—managed by Penn State's College of Engineering for the Met Ed Fund—begins each summer by educating and training teachers about energy conservation and alternative energy sources and by providing them with a classroom toolkit. Simultaneously, week-long summer day camp sessions are offered that allow motivated students to learn about the "4 E's" of energy: environment, efficiencies, economics, and ergonomics. Students then visit major manufacturing plants and experience first hand the 4 E's. Come fall, these campers complement their teachers' curriculum with their first-hand experiences. Students learn about renewable sources of energy, energy conversions, and conservation concepts and participate in hands-on projects involving lighting and insulation. Students also perform energy audits of their schools and make policy recommendations to local school boards regarding cost-effective investments in insulation, energy efficient lighting and heating, and the like.

The Youth Energy School has been so successful that energy-related policies and investments have changed in some local school districts, resulting in measurable energy savings. Like efforts in the 1970s to influence people's solid waste disposal habits by teaching children why and how to recycle, BCCF hopes programs that teach children about the 4 E's will change mainstream thoughts about the use of sustainable energy.

Founded:
1994
Total Assets:
$37 million
Percent Unrestricted:
25 percent
Geographic Area:
Berks County, Pa.

Sustainable Communities Program Berks County Community Foundation is currently developing a Sustainable Communities Program, modeled after the success of the Met Ed Fund programs. This program is designed to implement the Berks County Vision 2020 land-use plan, preserve agriculture, and support growth based on sound smart growth principles. The program emanated from a two-day sustainable communities summit convened by BCCF in 2003.

This particular effort seeks to educate local elected officials, business leaders, and home developers, along with preservationists and conservationists, about the relationships between how communities grow and issues that are relevant to how people live, work, and play. The Foundation is the facilitator, convener, and sometimes referee of the summits, workshops, and conferences that are needed to make this Berks County effort a success.

Funding the Efforts Berks County Community Foundation has demonstrated how a relatively small investment can have a major impact. The Foundation looks at ways it can leverage dollars by holding land-use summits that attract community members, organizations, and corporate interests that have dollars for future activities in these areas. It also chooses to work in areas where there are interested funders, such as the Metropolitan Edison Company Sustainable Energy Fund.

The Foundation's energy programs have been very popular with Metropolitan Edison, its donor, because it publicizes the utility's name in a positive context and because the programs are achieving their intended purpose: developing renewable energy sources, encouraging energy conservation, and promoting energy efficiency.

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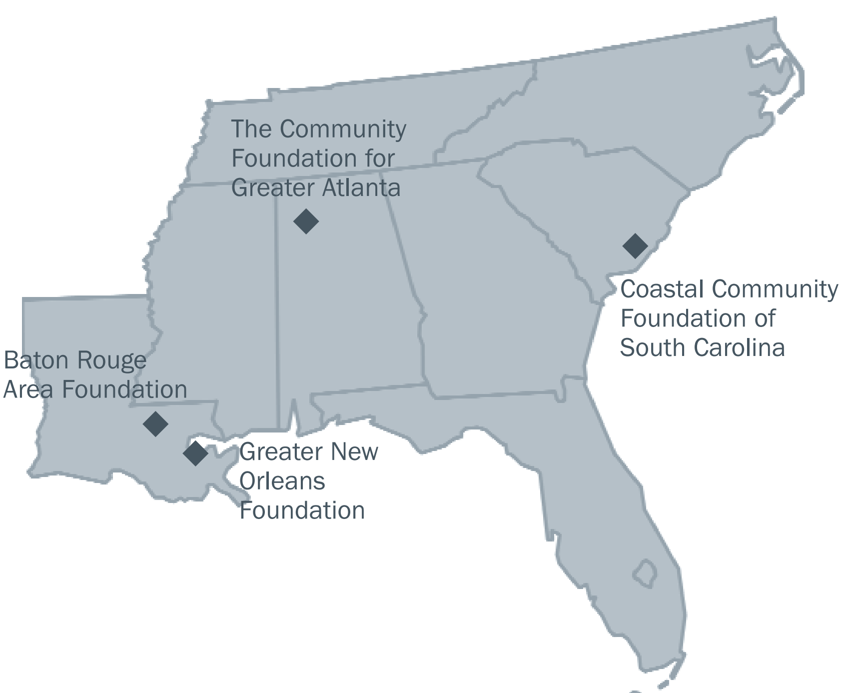
** Available as a resource on the subject of energy conservation.*

South

Baton Rouge Area Foundation
Coastal Community Foundation of South Carolina
The Community Foundation for Greater Atlanta
Greater New Orleans Foundation



Plan Baton Rouge: Rebuilding a Downtown from the Ground Up

In response to a disturbing decades-long trend, in the late 1990s, Baton Rouge Area Foundation (BRAF) initiated a downtown planning process aimed at creating a vibrant, walkable downtown. Until that time, many of the more affluent residents had abandoned their city—the Louisiana state capital—for outlying suburbs. Initially prompted by declining public schools, this shift left poor, mostly African American residents behind in a community slowly drained of its diversity, vitality, and tax base. Baton Rouge Area Foundation began its efforts by bringing in a lecturer from the Congress for the New Urbanism (CNU) to make public presentations and have more intimate conversations with the city council, planning commission, and other key groups on the benefits of a vibrant downtown.

The plan would shape the community with public spaces and community institutions and would detail the steps needed to create a 24-hour district by providing a mix of homes and apartments affordable to different incomes, pedestrian-friendly development, and a mix of land uses.

New Urbanist Influence The community readily embraced the concept and accepted the challenge to rejuvenate downtown Baton Rouge. The Baton Rouge Area Foundation formed an advisory committee to plot a course of action. The committee determined that the community should begin by developing a revitalization plan for downtown Baton Rouge that would adhere to the **New Urbanism** philosophy by restoring the city's urban center with well-designed development.

Many forces came together to facilitate the new plan. In 1988, the state of Louisiana adopted legislation that required the consolidation of all state offices in downtown Baton Rouge. The state then developed a master plan to relocate their buildings downtown, but the plan was not acted upon until 1996 with the administration of Governor "Mike" Foster and his second-in-command, the state's Commissioner of Administration, who became a partner in the Foundation's efforts.

As the momentum of the state's plans and the advisory committee increased, the Foundation persuaded the city and the state to jointly fund a New Urbanist plan for the downtown that would offer a guide to new downtown growth while preserving historic neighborhoods. The plan would shape the community with public spaces and community institutions and would detail the steps needed to create a 24-hour district by providing a mix of homes and apartments affordable to different incomes, pedestrian-friendly development, and a mix of land uses.

Founded:
1964

Total Assets:
$235 million

Percent Unrestricted:
30 percent

Geographic Area:
East and West Baton Rouge, East and West Feliciana, Livingston, Ascension, Iberville, and Pointe Coupee

Plan Baton Rouge In 1998, the Foundation sponsored a community **charrette** led by Duany Plater-Zyberk and Company, a nationally renowned architecture and town planning firm. Duany Plater-Zyberk (DPZ) brought in traffic, retail, and implementation experts to work with a diverse group of community members to envision a great downtown. The firm's observations of how the state's proposed architecture could better relate to the pedestrian experience resulted in the development of Plan Baton Rouge, a downtown master plan funded by the state and local governments and the Baton Rouge Area Foundation. To facilitate and monitor the implementation of the master plan, the Foundation also funded dedicated staff to oversee the implementation of Plan Baton Rouge.

Plan Baton Rouge also was charged with advocating for development and redevelopment of downtown projects beyond the state buildings. Widespread support for the plan has resulted in private and philanthropic investment in a broad spectrum of retail ventures, cultural amenities, and infrastructure improvements.

In fact, the relationship between Plan Baton Rouge, the state of Louisiana, the city of Baton Rouge and local planners is so good that the parish of East Baton Rouge decided, rather than pursuing the lengthy process needed to change its city codes to reflect New Urbanist principles, to ask DPZ to evaluate individual private development proposals.

Two examples illustrate the remarkable ability of this foundation funded and operated program to directly impact the development choices of the community. First, one of the state's primary buildings takes up one square block. The entire next block was slated to house a parking garage that was designed with a pedestrian bridge linking the two structures. Responding to suggestions by DPZ, the garage was redesigned with four pedestrian access points—all at ground level—bringing garage-users to the street as they walk to and from work each day. To enhance that experience, DPZ further suggested that the exterior of the garage's ground floor be leased to retail establishments. Today, Plan Baton Rouge holds leases on two of the sides and uses this income to support a permanent public market on the third face. In another case, the state was convinced to relocate a planned cafeteria from a fourth floor location to a prime ground level site thus encouraging state workers to venture outside at lunchtime.

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** Available as a resource on the subject of downtown revitalization.*

Signs of Success Given that declining quality of education was one of the forces that initially drove middle class families out of Baton Rouge, it is heartening to note that Baton Rouge schools are under local control after conforming to federally mandated desegregation for almost 50 years. The lifting of the court order was followed by a self-imposed city tax for the schools that will rebuild many schools and will work to improve instruction as well.

One of the most vivid signs of Plan Baton Rouge's success is that the program has been invited to help revitalize neighborhoods beyond the downtown. Here, the program uses the expertise learned in downtown Baton Rouge, particularly regarding attracting retail development to historically poor and under-served neighborhoods.

The Heirs' Property Preservation Project: Property Rights for the Poor

The Coastal Community Foundation of South Carolina (CCF)[5] sponsors a unique effort that is simultaneously helping the descendents of slaves hold onto land that has been passed down to them, while preventing sprawl development on the South Carolina Coast.

What is Heirs' Property? Following the abolition of slavery, African American families began to acquire land like other Americans. Yet due to lack of access to attorneys and information about probate, many of these parcels have been passed down from generation to generation without a will, clear title, or other documentation—thus creating "heirs' property" which is equally shared among descendants. Throughout the South, land loss among African Americans has reached alarming rates. This problem is most evident in coastal communities undergoing commercial and resort development. Sadly, through the operation of legal and administrative procedures, heirs' property owners are in constant danger of losing their inheritance.

A number of mechanisms are at work. Some heirs fail to pay property taxes due on their land, often because—due to multiple owners—they are not aware that taxes were due or who was responsible for paying them. By the time these heirs discover their debt, high penalties and interest often leave them no choice but to sell. In other cases, one heir wants to legally divide the family's land—usually to sell his/her share to a high-paying developer—so the courts force its sale, either because the parcel is not big enough to subdivide or there is no equitable way to do so. These threats relegate many African Americans who inherited land through intestacy to a disadvantaged class of property ownership.

In 1996, the Ford Foundation granted funds to the Coastal Community Foundation of South Carolina to expand its ability to work on rural economic development issues. When asked, the community responded that one of the area's key challenges was the fact that many poor land owners did not have clear title to their property because they held joint title as "tenants in common" with other heirs of the original purchasers.

Unfortunately, banks will not lend to such property owners because their collateral is not fully controlled by the borrower, making it difficult for heirs to improve their property or to build homes. Another consequence that occurs is that one heir is able and often sought after to sell their interest in the land to developers who then force the sale of the entire tract of family land.

The Foundation's interest in helping these heirs understand their property rights and gain the needed documentation to obtain all of the rights of a property owner is threefold: to empower predominantly poor heirs; to educate them about their rights because low-income people often are not at the table for discussions about community development; and to prevent sprawl development of the South Carolina coast.

Founded:
1974

Total Assets:
$100 million

Percent Discretionary:
12-14 percent

Geographic Area:
Georgetown, Charleston, Berkeley, Dorchester, Colleton, Hampton, Beaufort, and Jasper Counties

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[5] Formerly known as "The Community Foundation Serving Coastal South Carolina."

The Heirs' Project Although the Foundation was concerned in the beginning about bringing together parties with such diverse interests, in 1998 the foundation convened heirs and the governmental and nonprofit agencies that serve them. These meetings revealed that the inability to get mortgages prevents these landowners from building and improving their property. Yet the group realized that the issue goes beyond clearing title: another important piece of the Heirs' Project is to educate affected parties about their options and to provide mediation services to allow families to come to agreement on the future of their commonly-held land. Although there was agreement on the issues, participants did not initially concur on the priority of needed steps. For instance, a nonprofit group that helps renovate the homes of lower-income area residents felt that clearing title was the most important first step. On the other hand, others argued that educating heirs needed to come first. The group met for two years, long enough to allow understanding and buy-in from all parties, and eventually created a plan and a memorandum of understanding to define each group's role.

Managing the Project Because most of the issues related to heirs' property are legal in nature, the South Carolina Bar Foundation spearheaded development of the proposal and manages the Heirs' Property Preservation Project grant. Among the related activities funded by the original Ford grant are educational materials—including a video because not all property heirs can read—covering, "What is heirs property?," "What are a particular heirs' rights?," and "What are the rights of a family?," and legal services and education to attorneys and judges. The response in the community to the Project's seminars, booklets, and videos has been tremendous: people were hungry for information. Thus far, the project has touched over 5,000 people through education efforts and helped 54 clients with legal services.

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** Available as a resource on the subjects of community organizing and educating low-income residents, particularly on legal issues.*

Future of the Heirs' Project Now that the Heirs Property Preservation Project has been operational for a couple of years, the Coastal Community Foundation would like to take it beyond education to community organizing. It plans to expand the educational materials to include how to participate in planning one's community and information about how a particular parcel is affected by local zoning and ordinances. In 2004, CCF and the Bar Foundation are planning a series of land management seminars. Topics to be covered include what owners of heirs' property can do with their land once title is clear, getting a mortgage, land management, taxes, estate planning, and getting involved with local planning-related decision making around zoning, roads, and affordable housing.

The Coastal Community Foundation recently received a Gold award from the Wilmer Shield Rich Awards Program for Excellence in Communication for its public information campaign, including the video, brochures, and educational seminars from the Council on Foundations.

Helping the Atlanta Region Grow Smarter, One Neighborhood at a Time

Growing from a concern about sprawl's effect on Atlanta's quality of life, The Community Foundation for Greater Atlanta (TCF) supports a variety of efforts designed to help strengthen existing neighborhoods and build walkable, transit-oriented communities.

Sprawl in the Atlanta Region Beginning in the 1970s, two decades of white flight from the city of Atlanta created the fastest-growing, most-sprawling suburbs in the nation while leaving behind scores of poor neighborhoods in the urban core. According to the Atlanta Regional Commission (ARC)—the region's multi-jurisdictional planning agency—development consumes over 43,000 acres of open land each year. The ARC predicts that, by 2030, the Atlanta Metro-politan Statistical Area (MSA) will grow by an additional one million people to 6.2 million in population.

While the Community Foundation for Greater Atlanta is concerned about sprawl's effect on air quality, as important to the Foundation is the impact of this development pattern on disadvantaged neighborhoods in Atlanta and the region's inner-ring suburbs.

By the late 1990s, this rampant suburban development had contributed to polluting the region's air—by forcing residents into their cars for most every trip—to the point that the the region no longer complied with federal clean air standards. As a result, in 1998, the federal government halted funding for new road construction, thereby putting sprawl at the top of the region's agenda and forcing the region to address its sprawling conditions.

Supporting Neighborhoods While the Community Foundation for Greater Atlanta is concerned about sprawl's effect on air quality, as important to the Foundation is the impact of this development pattern on disadvantaged neighborhoods in Atlanta and the region's inner-ring suburbs. Through its grantmaking and Foundation initiatives and through support of selected public programs, TCF is helping improve quality of life in the Atlanta region in a number of ways. The Foundation helps neighborhoods obtain the resources and leadership necessary to become truly great places to live and work and also makes examples of the region's best development projects.

Beginning with a 1991 Charles Stewart Mott Foundation grant, TCF's Neighborhood Fund has supported neighborhoods by funding on-the-ground projects coupled with technical assistance, particularly in disadvantaged neighborhoods. This assistance has taken the form of financial management, leadership development training, specialized workshops on issues important to particular neighborhoods—such as air quality regulations and transportation funding opportunities—or targeted assistance to groups applying for federal tax-exempt status.

Founded:
1951
Total Assets:
$430 million
Percent Unrestricted:
13 percent
Geographic Area:
23-county Atlanta Metro area

In 2000, the Foundation created the Neighborhood Leadership Institute. Like the Neighborhood Fund, the Institute also works to strengthen the region's neighborhoods by focusing on individual neighborhood leaders. In partnership with the University of Georgia, the Institute operates a five-month course that focuses on building participants' leadership skills to increase their capacity to work effectively in their own communities.

Other Initiatives In addition to these Foundation initiatives, TCF also is working with the ARC to promote programs that encourage development in existing communities to improve quality of life for current and future residents. The ARC's Livable Centers Initiative is a competition to encourage planning and implementation of projects with a transportation feature, such as **walkability**, mixed-use development, or public transit. On average, ARC awards $1 million in planning grants and $19 million in implementation grants annually. The Foundation is developing a supplemental program whereby TCF will augment ARC funding to select projects to allow for additional features that are not part of the original ARC grant.

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Foundation staff support to donor-advised funds also has created dramatic results. The supporting organization that supports ARC programs also has funded strategic property purchases, master planning, landscape material, building improvements, playground equipment, and helped mobilize public advocacy to keep the Chattahoochee National Forest—Atlanta's "backyard"—a quiet, natural amenity despite the encroachment of sprawl development. Two grants helped build sections of walking/biking paths, one in urban Atlanta and one in Covington, Ga., the county seat of an especially fast-growing county (Newton).

This supporting organization also funds the Chattahoochee Hill Country Alliance, a grassroots effort to manage growth of over 40,000 acres of farmland in Fulton County located 30 minutes from the Hartsfield-Jackson International Airport in Atlanta. Under a new program to help protect farms, woodlands, and part of the east bank of the Chattahoochee River, property owners will be able to sell development rights and transfer those rights to one of three new towns being developed. Fulton County has incorporated these features into its consolidated plan and the state legislature has passed a bill allowing this transfer of development rights. The supporting organization gave $40,000 for staffing in the Alliance's second year of operation, which allowed the organization to help adjacent counties undertake similar projects affecting an additional 20,000 acres. The Community Foundation also provided support from its Competitive Grants program.

Finally, the same supporting organization funds technical assistance to communities to allow them to comply with Georgia Department of Transportation procurement policies. A $20,000 grant from one of TCF's supporting organizations to ARC earned more than $75,000 in federal funds, thus allowing ARC grantees to take steps to implement their mixed-use, transit-centered plans.

Bringing Together Interests of the Environment and the Economy

Through three related efforts, the Greater New Orleans Foundation (GNOF) works to improve quality of life by solving environmental problems that impede economic development. The Foundation's leadership seeks to develop and use widely accepted information to identify solutions to Louisiana's environmental challenges with a goal of facilitating economic development that does not harm the environment.

A prime example of the interrelationship between the environment and the economy is the erosion of the Louisiana coast, one of the last unprotected wetlands in the United States and origin of 80 percent of domestically produced seafood. If current erosion trends continue, Louisiana will be forced to choose which coastal cities will have to be abandoned to the sea in the next 25 years. Through the work of a variety of efforts supported by GNOF, scientists are learning about the mechanisms that have contributed to coastal erosion, beginning with the mining of offshore coral reefs in the 1930s and 1940s. Research has shown that these reefs were the coastline's first line of defense against hurricanes. Furthermore, hundreds of miles of levees and canals—built to accommodate petroleum and other imports—have prevented the natural migration of silt across the marsh that may have mitigated this erosion.

Getting Started The Foundation's first exposure to the environmental arena was a $6 million settlement from a 1996 class action suit against a Louisiana company for dumping toxic chemicals into the Mississippi River. The Foundation began slowly by creating an advisory board to oversee investment of the settlement. It searched for "bridge-makers" to appoint to the committee—leaders who have the capacity to understand and speak the language of more than one sector.

Before choosing a course of action in the still unfamiliar environmental field, Greater New Orleans Foundation—guided by its advisory committee—spent two years analyzing local, regional, and state environmental plans, including those favored by environmentalists, government, and/or business. Then the Foundation hired Resource Renewal, a California company, to convene 100 one-on-one meetings with business, government, environmental, and community representatives and asked each what steps they thought were needed to create a healthy environment and a prosperous economy. This process revealed three key steps that would guide GNOF's future environmental activities:

Before choosing a course of action in the still unfamiliar environmental field, Greater New Orleans Foundation—guided by its advisory committee—spent two years analyzing local, regional, and state environmental plans, including those favored by environmentalists, government, and/or business.

Founded:
1983

Total Assets:
$115 million

Percent Unrestricted:
13 percent

Geographic Area:
The 14 parishes in the southeast corner of La.

1. Educate the general population about the importance of and links between environmental and economic development issues;
2. Develop data that business, government, and environmentalists can agree to and use to make decisions about worthwhile environmental investments; and
3. Identify a prominent business champion to drive efforts to bring together the interests of the environment and the economy.

Educating the Public The Greater New Orleans Foundation supports a number of efforts to accomplish these steps. The Foundation sponsored an 18-month long indicators process involving multiple convenings to identify and collect baseline data on issues related to improving quality of life in southeastern Louisiana, primarily through strengthening the local economy. This information allows the Foundation and others to track progress on key indicators—such as water quality and unemployment rates—and to communicate to the general public about the relationships between environmental health, economic development, and quality of life.

Developing Data The Greater New Orleans Foundation also provided start-up funding to the Environmental Resource Consortium of Louisiana (ERCLA), a nonprofit organization that brings together scientists involved in research on environmental challenges that have an economic impact.

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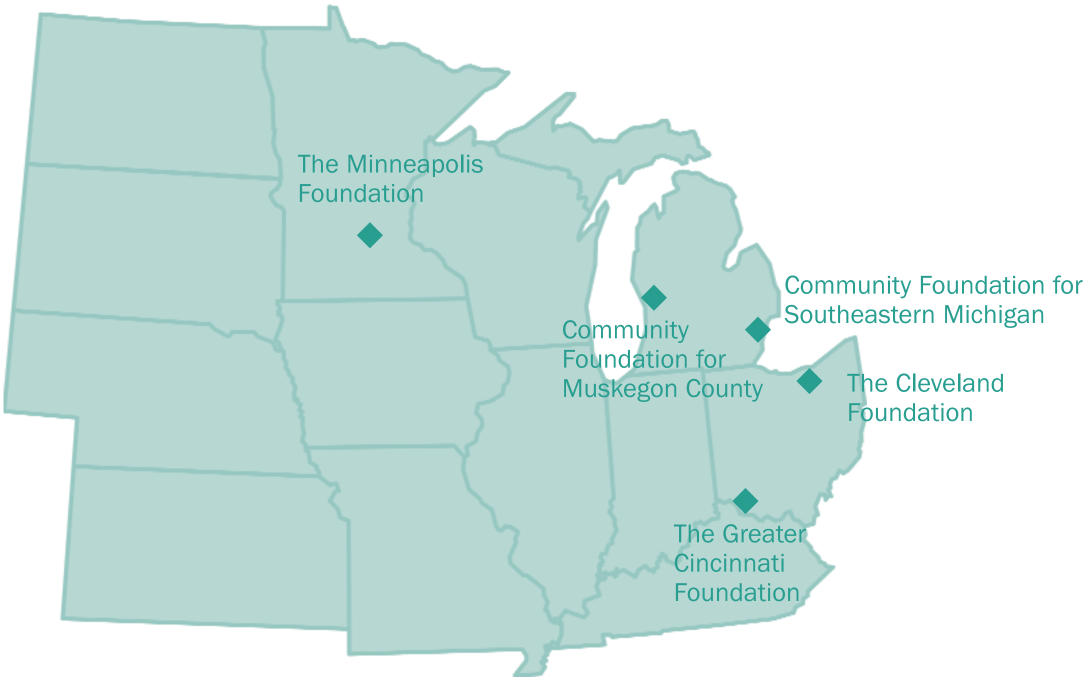
** Available as a resource on the subject of linking the environment and the economy.*

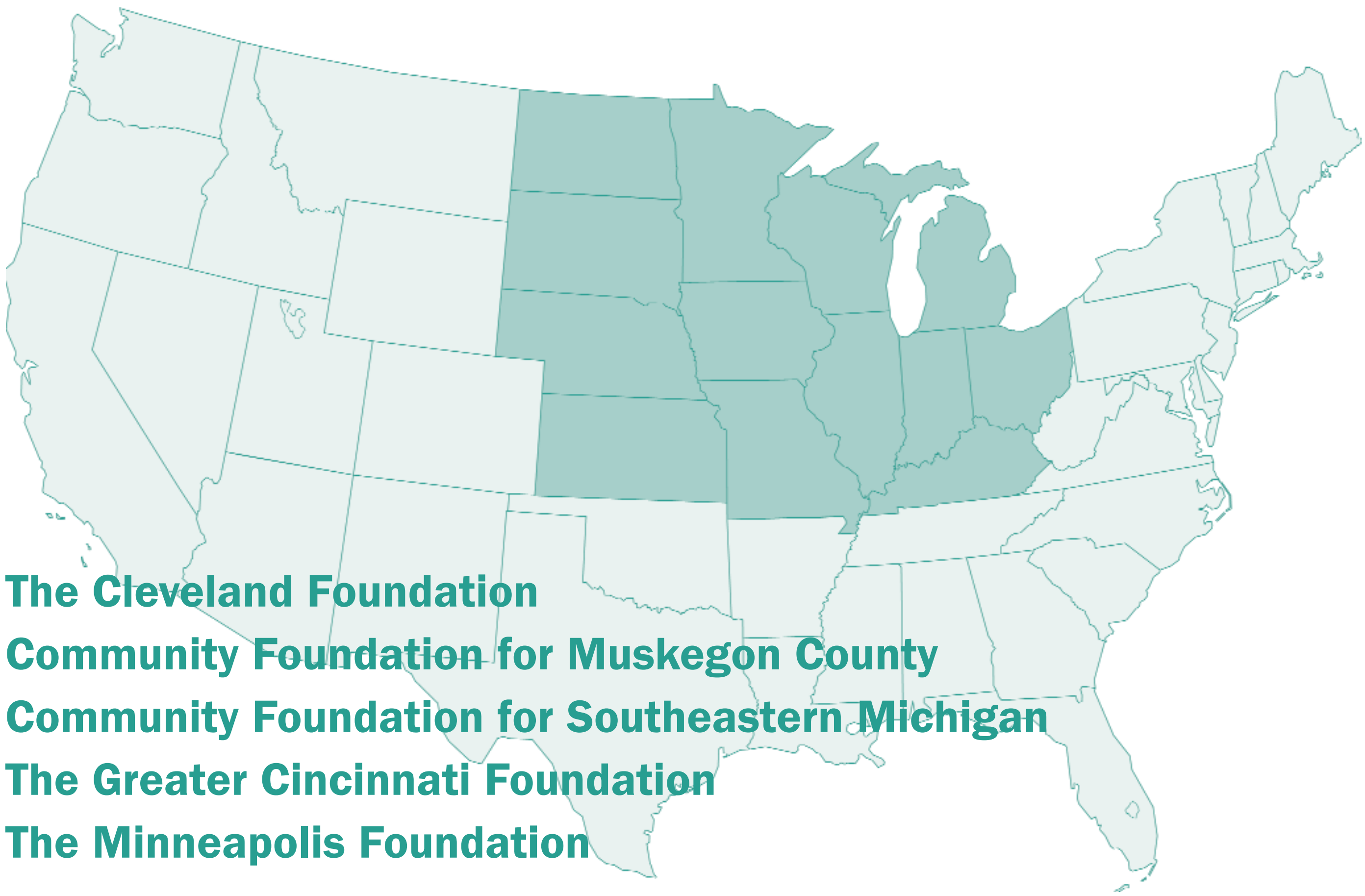
Another environmental effort with an economic development angle that GNOF has underwritten is the J. Bennett Johnston Science Foundation. Started by retired U.S. Senator Johnston, this supporting organization funds scientific research on environmental issues that impede economic development. For instance, to avoid situations where multiple interest groups hire their own experts to generate data to make their case, the Science Foundation helps develop neutral data agreed to by environmentalists, business, government, and the community that can be used to make universally-supported decisions. These resources allow each sector to move from a defensive stance to one of cooperation.

In addition to three years of start-up money, GNOF is providing a $1 million challenge grant to the Science Foundation plus $100,000 for regranting to graduate students doing research on environmental issues that relate to economic development.

A Business Champion In part through GNOF's efforts, a business champion did, indeed, reveal himself. R. King Milling is president & CEO of New Orleans-based Whitney Bank. His interest in coastal erosion led to his being named as chair of a state-appointed task force on the subject. In that process, Milling has brought other parties to the table with an economic interest in coastal Louisiana, resulting in the creation of the American Wetlands Fund, a national education program to elevate the issue of coastal erosion in Louisiana to a national issue.

Midwest





The Cleveland Foundation
Community Foundation for Muskegon County
Community Foundation for Southeastern Michigan
The Greater Cincinnati Foundation
The Minneapolis Foundation

Protecting the Neighborhoods of Cleveland and the Region's Inner-Ring Suburbs

The Cleveland Foundation supports a number of programs in the city of Cleveland and in its inner-ring suburbs that bring key parties together to protect neighborhoods from financial disinvestment.

Greater Ohio is looking to support policies that encourage the protection of open space, the improvement of social equity, and increased resources to combat challenges to education throughout Ohio, all of which stand to increase the livability of Cleveland's neighborhoods.

First Suburbs Consortium Since 1996, the Foundation has supported the First Suburbs Consortium, a collaborative effort of the mayors of ten of Cleveland's inner suburbs. In the context of the Consortium, these neighboring municipalities are sitting down together to talk about their common issues including how to work with the city of Cleveland, how to diversify their housing stock, and how to make their retail areas more competitive.

Greater Ohio The Cleveland Foundation also is a founding member of Greater Ohio, a statewide effort launched in 2004 to bring together different constituencies to promote balanced growth throughout Ohio. Greater Ohio—headed by a former state lawmaker—is an outgrowth of a 2002 meeting convened by the Funders' Network for Smart Growth and Livable Communities. Greater Ohio is looking to support policies that encourage the protection of open space, the improvement of social equity, and increased resources to combat challenges to education throughout Ohio, all of which stand to increase the livability of Cleveland's neighborhoods.

Neighborhood Connections Neighborhood Connections is another Cleveland Foundation effort aimed at improving conditions in Cleveland's neighborhoods. Through this small grants program, The Cleveland Foundation benefits grassroots groups working in Cleveland's neighborhoods. For instance, the program supports a neighborhood group called Eastside Retention of Industry and Employment Network (ERIE-Net), which works to improve job creation and safety conditions stemming from vandalism and illegal dumping in Cleveland's industrial-based neighborhoods. This work in turn encourages local businesses to remain in the city rather than moving to **greenfield** or suburban locations.

Founded:
1914
Total Assets:
$1.5 billion
Percent Discretionary:
40 percent
Geographic Area:
Greater Cleveland, Ohio

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** Available as a resource on the subject of convening.*

Great Lakes Community Foundation Environmental Collaborative: Spurring Environmental Grantmaking

The Community Foundation for Muskegon County was one of 21 community foundations that took part in the Great Lakes Community Foundation Environmental Collaborative[6], an effort to expose community foundations to environmental issues and to encourage increased environmental grantmaking in the Great Lakes region.

The Foundation now understands the effect that brownfields, white flight, and school sprawl, for instance, have on the environment and on quality of life for all area residents. The Foundation credits its participation in the Collaborative with helping it to think more regionally and to broaden its perspective in all of its grantmaking.

Although the environmental movement began in the 1970s, interest in environmental protection came more slowly to community foundations. By and large, community foundations have generally viewed efforts to protect a region's air, water, and open space as potentially contentious (for example, it sometimes involves environmental groups fighting with local businesses who may be important donors and trustees).

Yet by the 1990s, this trend began to change. In the Great Lakes region in 1993, the Council of Michigan Foundations began a dialogue among environmentally-minded private foundations to discuss how to leverage their assets to expose community foundations to environmental issues and encourage more widespread environmental grantmaking along the perimeter of the Great Lakes—including parts of Indiana, Illinois, Michigan, Minnesota, New York, Ohio, Ontario, Pennsylvania, and Wisconsin.

By 1996, this dialogue resulted in the creation of the Great Lakes Community Foundation Environmental Collaborative. The convening foundations hoped that by offering community foundations information, guidance, and matching grants, the Collaborative would: educate trustees and staff of the participating community foundations; strengthen participating community foundations' ability to convene the community on environmental issues; and increase participants' environmental grantmaking either by establishing or increasing their environmental endowments.

Out of 39 applicants in phase one, 17 community foundations—including the Community Foundation for Muskegon County—received matching grants to accomplish the goals of the Collaborative. Until that point, none of these community foundations had environmental program areas or were routinely making environmental grants in any planned or strategic fashion.

Founded: *1961*

Total Assets: *$85 million*

Percent Discretionary: *24 percent*

Geographic Area: *The Muskegon, Mich. region*

[6] The collaborative began in 1996, with initial funding from the Charles Stewart Mott Foundation and the Great Lakes Protection Fund. The Council of Michigan Foundations was the project coordinator. For more information, visit http://www.cmif.org/GreatLakesHome.htm.

Community Foundation for Muskegon County The Community Foundation for Muskegon County was one of the participating community foundations that used the opportunity of the Great Lakes Community Foundation Environmental Collaborative to permanently extend the reach of its organization into the environmental arena. Although Foundation staff were initially concerned that its board would not be comfortable getting involved with environmental issues, this proved not to be the case. Not only did the board embrace the new direction, but the decision to participate in the Collaborative had other, unanticipated benefits as well.

As a first step of its work, the Foundation convened 26 Muskegon County environmental organizations to discuss their needs and collective priorities. Apart from identifying key environmental issues facing the county, the meeting also provided a gathering place for groups that had never before met. For the first time, the Foundation was becoming familiar with the environmental issues facing its region and, today, is much closer to the organizations working on these issues. Beyond Muskegon County, the Foundation now has a richer network of contacts among its sister community foundations throughout the Great Lakes region. In fact, a later phase of the Collaborative paired select foundations—including Muskegon County—with non-environmentally active, adjacent community foundations as a strategy for expanding the universe of community foundations engaged in environmental grantmaking. As a result of an effective outreach effort by Muskegon County, the Fremont Area Community Foundation also joined the Environmental Initiative.

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** Available as a resource on the subject of building environmental program capacity.*

Rather than creating a new silo, the Great Lakes Community Foundation Environmental Collaborative became a pathway for the Community Foundation for Muskegon County to still other issues, such as the social justice component of the environmental movement. The Foundation now understands the effect that brownfields, white flight, and school sprawl, for instance, have on the environment and on quality of life for all area residents. The Foundation credits its participation in the Collaborative with helping it to think more regionally and to broaden its perspective in all of its grantmaking.

One of the biggest surprises emanating from the Community Foundation for Muskegon County's entrance into the environmental grantmaking arena is the discovery of an area about which younger donors are passionate. The next generation of donors is very acclimated to environmental issues and the environmental movement. By opening the Foundation's portfolios to environmental issues, it has added a subject that appeals to younger donors.

Although the Great Lakes Community Foundation Environmental Collaborative has formally concluded, the legacy of the effort's collaborative process and key initial investments will live indefinitely through the resulting environmental endowments and grantmaking of community foundations throughout the Great Lakes region.

The GreenWays Initiative: Using Trails to Promote Green Ways of Living

A grant from the Council of Michigan Foundation's Great Lakes Community Foundation Environmental Collaborative[7] in the late 1990s set the stage for the development of the Community Foundation for Southeastern Michigan's GreenWays Initiative. Using the publication "A Vision for Southeast Michigan Greenways"—published by the Rails-to-Trails Conservancy in 1998 and funded in part by the Community Foundation for Southeastern Michigan (CFSEM)—to help define the potential for what could be done on the ground in southeast Michigan, CFSEM announced a five-year, $25 million GreenWays Initiative in 2001.

The premise behind the GreenWays Initiative was the use of private funds, in the form of grants or institutional development programs, to create changes in ways communities relate to their landscape, to provide safe non-motorized routes to schools and enhance recreational opportunities, to improve the health and well-being of the public, and to stimulate public and private investment by leveraging additional public resources.

The GreenWays Initiative The premise behind the GreenWays Initiative was the use of private funds, in the form of grants or institutional development programs, to create changes in the ways communities relate to their landscape, to provide safe non-motorized routes to schools and enhance recreational opportunities, to improve the health and well-being of the public, and to stimulate public and private investment by leveraging additional public resources. The GreenWays Initiative supports the planning, design, and construction of greenways, technical assistance and training for organizations and agencies responsible for greenways, and an improved understanding of the benefits of greenways.

An important objective of the GreenWays Initiative is to encourage communities to plan and work together, thus ensuring that the regional greenways network connects and shares benefits across jurisdictional lines. This arrangement has stimulated the creation of a number of multi-jurisdictional partnerships that have expanded beyond joint grant applications to tackle common challenges.

The GreenWays Initiative also has raised the profile of the concept and benefits of greenways in communities through which it passes. Grants awarded through the GreenWays Initiative have allowed area residents to better understand that the linear corridors that link their communities are more than pretty bike paths. These greenways are used for transportation and recreation, offer health benefits to users, and help the environment by protecting

Founded:
1984
Total Assets:
$350 million
Percent Discretionary:
94 percent
Geographic Area:
7 counties that surround and include Detroit

[7] For a fuller discussion of the Great Lakes Community Foundation Environmental Collaborative, see the Community Foundation for Muskegon County profile on page 42.

open space and encouraging walking and bicycling. Since the inception of CFSEM's GreenWays Initiative in 2001, the Centers for Disease Control and Prevention (CDC) have identified the region—home to 55 percent of the state's population, including the city of Detroit—as the most obese community in the United States. The Foundation sees the GreenWays Initiative as a critical response to this emerging community concern: the indoor and sedentary lifestyle of too many of the region's children.

Funding the Initiative The GreenWays Initiative was launched in 2001 as a five-year effort during which $25 million in private funds raised by CFSEM were intended to leverage an additional $50 million in public money. Through April 2004, the Community Foundation has awarded over $7 million in GreenWays grants, which will leverage over $35 million in federal and state funding. This figure is particularly impressive in the context of the region's historic ineffectiveness at attracting federal and state funding for land-related purposes. The GreenWays Initiative has not yet pursued health-related dollars, but is investigating opportunities in this area.

Although the GreenWays Initiative is an initiative of the Community Foundation, all administrative costs of and grants made by the program come from funds raised expressly for the GreenWays Initiative. Funds are currently being raised to establish a $5 million GreenWays endowment fund, which will allow the Initiative to live beyond its originally planned five-year life span.

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** Available as a resource on the subjects of regional trail development and leveraging public funds.*

Ingredients of Success Like any flourishing endeavor, a number of factors contributed to the GreenWays Initiative's success. To take on a project of this magnitude, the community needed a sense that opportunities were real and that an extensive trail network could be accomplished. The "Vision for Southeast Michigan Greenways" served this purpose.

Funding for the Initiative depended on finding at least one funder—The Kresge Foundation—that was able to see the grand vision of the GreenWays Initiative and support it at a significant level. The Kresge Foundation's financial backing was essential to stimulating the interest of other large private and public funding sources.

Finally, given the enormity of the potential trail system envisioned by the Rails-to-Trails Conservancy, the GreenWays Initiative could not have gotten off the ground without the sponsorship, endorsement, and support of a credible, universally respected region-wide institution. The Community Foundation for Southeastern Michigan was the perfect vehicle to embrace such an initiative.

Better Together Cincinnati: A Funders' Collaborative to Improve Race Relations

In an effort to reduce economic and social disparities in its region, The Greater Cincinnati Foundation (GCF) has organized a "funders' collaborative"—multiple grantmakers working toward a shared goal that cannot as easily be reached by working independently. The collaborative supports initiatives intended to achieve greater equity, opportunity, and economic inclusion for the region's African American community.

Although the effort is largely focused on the city of Cincinnati, members of the collaborative understand that strengthening the urban core will have positive impacts that extend throughout the region.

The Foundation's work in this area began in 2000, through its participation in *Bowling Alone* author Robert Putnam's nationwide "**social capital**" study. By comparing Cincinnati to other communities, the Foundation found that, as a region, Greater Cincinnatians have less inter-racial trust and fewer inter-racial friendships than the national norm. This finding came as no surprise to the Foundation, which had supported earlier work by political economist Myron Orfield that documented the racial and economic segregation that exists in the region. Through that work, the Foundation recognized that these disparities are not limited to the inner city, and, therefore, require a regional approach to solve.

Coincident with the 2001 release of the Putnam study results, a class action suit was filed against the Cincinnati Police Department alleging racial profiling. Soon thereafter, Cincinnati erupted in a brief but pivotal period of violence. In response, Cincinnati's mayor appointed a community-wide advisory committee—called Community Action Now (Cincinnati CAN)—to "achieve greater equity, opportunity, and inclusion for everyone by addressing the disparities that impact people in need, particularly in the African American community."

By 2002, steps to end racial profiling had been agreed to and Cincinnati CAN had identified its action plan. The Foundation played a pivotal role in providing Cincinnati CAN start-up resources for staff and administrative support, helping secure resources from other funders, and housing staff at GCF offices. In spring 2003, as CAN was preparing to sunset, GCF offered to help its co-chairs assemble and manage funds to support the implementation of several long-term initiatives. While the Foundation saw this as an opportunity to make an important contribution to racial equity in Cincinnati, it acknowledges that it was risky to declare race relations as an issue it was going to take on, particularly in a leadership capacity. The 2001 riots, however, helped galvanize the Foundation's commitment to seek solutions and from 2001 to 2003, it committed over $3.5 million in grants to a variety of efforts aimed at reducing racial disparities.

Founded:
1963

Total Assets:
$313 million

Percent Discretionary:
26 percent

Geographic Area:
The 8 county Cincinnati region (southwest Ohio, northern Ky., and southeast Ind.)

Forming a Funders' Collaborative Recognizing the long-term nature of the effort, The Greater Cincinnati Foundation organized a funders' collaborative called, "Better Together Cincinnati." Together, the group has committed nearly $6 million over five years, with a goal of raising an additional $4 million to $6 million. Examples of grants that Better Together Cincinnati has made include construction and start-up funding for neighborhood-based centers that will bring better health care, homeownership opportunities, and a community police partnering center to primarily African American communities.

Although the effort is largely focused on the city of Cincinnati, members of the collaborative understand that strengthening the urban core will have positive impacts that extend throughout the region. Improving inner-city schools today will create a better-educated workforce in the future. Bringing area residents of all races back to the core—whether for jobs, entertainment, or to live—will help create a vibrant city in which it is fun and exciting to live. And, as race relations improve, public expenditures can be redirected from policing to education and other enriching public services.

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** Available as a resource on the subject of collaborative grantmaking.*

Funding Better Together Cincinnati Better Together Cincinnati is one of the most ambitious efforts that the Foundation has ever attempted. It manages the effort—including convening area grantmakers and other funders—administers the grantmaking process, and has committed $500,000 to the effort, not including a prior $250,000 grant to Cincinnati CAN. In addition, Foundation donors have given $100,000 in individual gifts.

Representation One interesting challenge of the endeavor is maintaining Better Together Cincinnati's connection to the community it is trying to serve. While Cincinnati CAN was a broad-based group that included representatives of the neighborhoods in need of change, the funding collaborative is just that: a group of funders working together toward a common objective. Although the goals and intermediate steps were well defined by those working to end racial profiling and by Cincinnati CAN, Better Together Cincinnati recognizes the need to avoid insulating itself by finding ways to work with community members as partners.

The Foundation believes that Better Together Cincinnati is a funder collaborative that can be a model for other foundations, particularly in communities with many corporations that may be willing to back efforts to improve their regions, but that do not have time to engage as fully on local issues as a community foundation. When a community foundation facilitates the process of working together with other funders by organizing a funding collaborative, it is giving itself and other funders in the community the opportunity to make a bigger impact than they could by working alone.

Affecting Region-Wide Change through Leadership and Intentional Grantmaking

The Minneapolis Foundation believes that to be effective, it needs to advocate for change necessary to improve quality of life throughout the Twin Cities region. As catalyst, funder, fundraiser, convener, educator, or spokesperson, the Foundation often takes a public stand on controversial issues and is willing to quickly take the lead when the need emerges.

Although the Foundation has long seen the value of advocacy, it is only during the last decade or so that it has moved almost exclusively to supporting region-wide and statewide work through its unrestricted grantmaking as opposed to smaller scale, perhaps more concrete, projects.

Advocacy While some community foundations stay away from advocacy, The Minneapolis Foundation has focused on learning what types of advocacy and lobbying activities are permissible by law. While some foundations may be concerned and less willing to risk alienating donors or damaging their reputations, The Minneapolis Foundation, on the other hand, deals with these risks by acknowledging them and by educating itself and others about controversial issues it is considering taking on. The Foundation's board of trustees—which represents a broad spectrum of social, political, and cultural perspectives—are actively engaged in Foundation discussions about how best to approach such issues and are willing to take risks with bold stands on controversial issues when they believe the best interests of the community are at stake.

This philanthropic philosophy is exhibited in a series of public education campaigns sponsored by The Minneapolis Foundation that are designed to be provocative and to elicit public dialogue. Although the Foundation has long seen the value of advocacy, it is only during the last decade or so that it has moved almost exclusively to supporting region-wide and statewide work through its unrestricted grantmaking as opposed to smaller scale, perhaps more concrete, projects.

This transition began in the late 1990s as a result of an initiative that focused on seven Minneapolis neighborhoods with the highest incidence of childhood poverty. The Foundation analyzed the resources that had been invested in these communities over the years and the progress toward alleviating the plight of neighborhood children. Based on the results of this investigation, the Foundation eventually concluded that real change is impossible if efforts are made only at the neighborhood level; rather, transformation must take place on a regional scale.

Shift to Policy Work In response, The Minneapolis Foundation began shifting grants from direct service to broader, policy level work aimed at systems change, particularly around issues of race and social justice. For instance, the Foundation began to fund region-wide efforts such as the Alliance for Metropolitan Stability—a collaborative that targets regional issues such as brownfields and urban economic development.

Founded:
1915
Total Assets:
$550 million
Percent Discretionary:
30 percent
Geographic Area:
Minnesota

The transformation was deliberate, risky, and unpopular with existing grantees who, in order to continue to receive Foundation funds, would have to shift their focus as well. For instance, a consortium of nonprofit developers that had been receiving financial assistance from The Minneapolis Foundation to construct specific development projects began asking for support that would allow them instead to help community development corporations across the Twin Cities build housing.

Public Information Beyond shifting its grantmaking, The Minneapolis Foundation employs another, more direct method of affecting region-wide change in the Minneapolis/ St. Paul area and beyond. Rather than waiting for grantees to apply on behalf of worthwhile efforts, the Foundation conducts public information campaigns and develops community partnerships to promote awareness and dialogue on issues such as education, immigrants' rights, or reducing government funding cuts to public agencies and nonprofits that deliver essential services to Minnesotans in need.

A case in point is the Foundation's efforts to bring what it considers to be an escalating affordable housing crisis to the attention of state legislators. In 1998, the Foundation issued a Request for Proposals (RFP) to spur a new approach to affordable housing advocacy: professional advertising and public relations—never before used in Minnesota to sway public opinion and influence decision-makers on the issue. The RFP called for nonprofits to partner with a public relations firm to distill a clear, cohesive message and bring the issue to public attention and onto the radar screen of state legislators.

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** Available as a resource on the subject of advocacy.*

HousingMinnesota—the statewide collaborative that formed as a result—created billboards, bus signs, radio and print ads, a website, and a brochure rooted in messages of self-interest—making connections between affordable housing and healthy economic development, children's academic success, and other issues that enjoy broad public support. As one observer noted, "As a result of these advocacy efforts, affordable housing catapulted from relative obscurity to the top of the public policy agenda in a very short period of time. There is now widespread public acceptance of the primacy of this policy issue, as witnessed by the willingness of virtually every local political candidate and official to embrace this goal."

But offering grants to the nonprofit sector and, when appropriate, supporting public awareness campaigns are not enough to affect long-term change. Like many community foundations, The Minneapolis Foundation enjoys influence with a number of constituencies, from "frontline" grantees, such as social service and advocacy organizations, to opinion leaders, politicians, and multi-million dollar philanthropists. It also invites participation by donors, policymakers, and media partners and lend their own voice, expertise, and connections to enhance and extend what these collaborations can do. In fact, one of the accomplishments of which the Foundation is proudest is its success at helping diverse organizations work together to achieve common goals.

West
(including Western Canada)

California Community Foundation
East Bay Community Foundation
Humboldt Area Foundation
Marin Community Foundation
The San Francisco Foundation
Santa Barbara Foundation
Ventura County Community Foundation
Vancouver Foundation

Stabilizing Low-Income Neighborhoods with an Affordable Housing Land Trust

The California Community Foundation (CCF) has been a leader in financing affordable housing development in the Los Angeles basin for over a decade. In response to Los Angeles' acute shortage of affordable homeownership, it recently created the Community Foundation Land Trust (CFLT).

Community Foundation Land Trust In December 2002, the Foundation's board of governors voted to create an urban land trust to help confront an important but often overlooked dimension of meeting a region's housing needs: affordable homeownership. The board formed a supporting organization —the Community Foundation Land Trust—and funded its initial operations with a $3.8 million grant.

Using a number of creative mechanisms, the CFLT provides low-income families an opportunity to own their own home. In perhaps its best-known program, the Land Trust acquires land, removes it from the marketplace, and places it in trust so that homebuyers can avoid having to acquire the expensive land upon which their property sits. Each family owns their Trust home with only two restrictions: 1) the family must occupy the home; and 2) when they are ready to move out, the family must sell the home to a buyer in the same income range. The first restriction is designed to eliminate homes being sold to outside investors who in turn take single-family residences and turn them into multi-family rentals, a growing problem in California's exorbitantly expensive housing market. The second restriction keeps housing affordable and allows families who have lived in a given neighborhood to continue to live there.

Because the Land Trust purchases the land—which in Southern California can account for over 40 percent of the total cost of a home—the homeowner need not finance the land component, and therefore has a smaller mortgage to service. Consequently, a Land Trust home can be financed on a 15-year mortgage rather than a 30-year mortgage (which pays down very little principal in the first several years). Instead of the tax deduction write-off of interest payments, Trust homeowners accumulate principal. Furthermore, after 15 years they will no longer have a mortgage payment.

Other devices employed by the CFLT to help low-income families purchase homes and create wealth are a down payment assistance program and the use of major for-profit builders. The assistance program subsidizes a portion of participants' down payments, thereby adding to their wealth creation. (More commonly, low-income home ownership programs provide zero interest loans, which require repayment.) The CFLT also uses large builders to construct projects because their scale results in lower construction costs, thus allowing the benefits of any subsidies for land and/or down payment to accrue to the property owner, rather than being used to defray the higher cost of a smaller developer.

The California Community Foundation has thus far been able to capitalize on its good relationships with local neighborhood organizations and its solid track record of grantmaking in housing and community development to buy land in neighborhoods without the resistance or skepticism that a government entity, bank, or private developer might encounter. The CFLT currently has five projects in the pre-development stage in Los Angeles, totaling 319 units. All told, they represent $64 million in real estate investments. By mid-2005, the Land Trust expects 400 homes affordable to families whose income falls into very low- or low-income categories to be built using one or more of its assistance programs.

Founded:
1915

Total Assets:
$600 million

Percent Unrestricted:
40 percent

Geographic Area:
Los Angeles County (including 88 cities in the Los Angeles basin)

Benefits of CFLT The Community Foundation Land Trust's most direct benefit is to the families who will benefit from being able to own a home because of the CFLT. Yet beyond these individuals, the CFLT also benefits the neighborhoods in which these new homeowners live. Because many of the region's poor will never be able to afford to buy a home in their own neighborhood, they are vulnerable to rising rents and displacement. New immigrants are especially susceptible due to their typically lower-income status and limited language skills. Helping local residents become homeowners helps counteract the transient nature of such neighborhoods by creating permanent residents with a stake in their communities.

Another benefit of the CFLT is that by removing land from the marketplace, the Land Trust is helping stop predatory lending practices common in poor neighborhoods. Perpetrators target cash-poor homeowners by offering them high interest loans, using their homes as collateral. By taking the land out of the equation, Trust homeowners are less attractive prey.

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CFLT Partners The California Community Foundation's CFLT cannot single-handedly stabilize and revitalize the Los Angeles basin's low-income neighborhoods. Thus, the Land Trust has many partners in this effort. In addition to seed funding from the Foundation, CFLT has received operating support funds from the Fannie Mae Foundation and the Washington Mutual Foundation.

The CFLT also works closely with local community development corporations (CDCs), which have land to develop, a successful track record in community development, and strong local relationships. In the context of their work with the Land Trust, CDCs identify nuisance properties and other parcels of land that could be redeveloped, select the program's homebuyers—subject to CFLT approval—and conduct special CFLT homebuyer education programs.

A variety of public sector and private sector partners also are critical to CFLT's success. The Land Trust works with local governments to identify surplus government land holdings that could accommodate affordable housing. Thus far, four municipalities have contributed a total of nearly 100 vacant parcels. The Land Trust also hopes to revitalize low-income neighborhoods by purchasing large under-developed parcels near commuter rail stations, working with local municipalities to re-zone for higher density **transit-oriented development**, then reselling a portion of the land to private developers at market rates. The Foundation believes this will allow the affordable housing component of the project to be subsidized by the marketplace rather than by the public sector, as is typically the case.

The CFLT's Future Piloting a new and complex model of affordable home ownership is not easy. The model is new to the Los Angeles market and keeping potential participants in a deal for the long-term might also prove difficult. The model is itself complex: explaining the benefits of this nontraditional route to homeownership to potential buyers will require a cohesive homebuyer education and public relations strategy. Finally, it must be determined how best to integrate CFLT's projects with the California Community Foundation's other lending and grantmaking efforts in low-income neighborhoods. In spite of these challenges, the CFLT model is a promising new approach to increasing homeownership for first-time homebuyers in Los Angeles.

The Livable Communities Initiative: Advocating for Community Change

In 1998, the president of East Bay Community Foundation's (EBCF) board of trustees—a long-time proponent of sustainability, affordable housing, and equity—became aware of **infill** potential in the Uptown area of Oakland. The city of Oakland was grappling with what to do with this neglected neighborhood situated near public transit, within walking distance of downtown Oakland, and home to some of the most historic sites in town (and, unfortunately, to some of the most polluted). The Foundation soon after employed one of the key roles of a community foundation—that of convener—to bring together stakeholder groups involved with the area to discuss common goals. As a result, the Livable Communities Initiative (LCI) of EBCF was born.

Since then, LCI has evolved from a single project in Uptown Oakland to six distinct project areas distributed throughout the diverse rural, suburban, and urban communities of EBCF's two-county service area. The Foundation recognized early on that its initial focus on revitalizing one inner-city neighborhood needed to be balanced through a multi-pronged and holistic approach that addresses the larger regional forces that impact growth and opportunity in inner-city neighborhoods as well as rural and suburban communities across the East Bay. Put another way—what happens in rural communities on the metropolitan fringe and in sprawling outer-ring suburban cities is directly correlated with growth and investment in the urban core and inner-ring suburbs. The LCI is committed to working on a menu of strategies that impact land-use decision-making at the neighborhood, city, and regional levels to help build better communities across its region.

Helping Farms and Farm Workers In Brentwood—historically an agricultural community that now has the distinction of being one of the fastest growing cities in California—LCI worked with city staff, farmers, local businesses, residents, and others to establish an "Agricultural Enterprise Program." The Program gives farmers the option of selling conservation easements on their land to a land trust or exchanging their development rights for the right to build more densely in the built areas of Brentwood. In addition, LCI has partnered with a regional open space protection group and a local faith-based organization to build the capacity of lower-income residents—predominantly Latino farm workers and their families—to participate in local land-use planning and decision-making. A key success was the implementation of an inclusionary zoning ordinance—through a unanimous vote by the city council—that ensures that at least 10 percent of the homes or apartments in every new housing development will be affordable to very low- and low-income households in Brentwood.

Creating a Vibrant Suburban Community The LCI also is working in the city of Pleasanton, an outer-ring suburban community, to convert the largest office park in Northern California to a mixed-use, transit-oriented development (TOD) that capitalizes on its adjacency to a BART[8] station. The Foundation is partnering with the Hacienda Business Park Owners Association—a 501(c)(3) organization—to propose rezoning more of their land for residential use and a new "mixed-use" designation as part of the city's General Plan update process. This work involves attending public workshops, meeting with city staff and elected officials, and drafting a comprehensive report that addresses three primary areas of concern to Pleasanton residents—traffic, school capacity, and

Founded:
1928
Total Assets:
$160 million
Percent Discretionary:
20 percent
Geographic Area:
Alameda and Contra Costa Counties, Calif.

[8] San Francisco Bay Area Rapid Transit (BART).

open space. To address these concerns, LCI hired a transportation planning firm to conduct a review of literature on TOD trip generation rates. The study indicates that the traffic reduction potential of TOD is real and substantial. In addition, LCI has provided a grant to the organization, Redefining Progress (RP), to produce a report estimating the quality of life benefits of compact, mixed-use transit-oriented development in the business park versus traditional sprawl development. Finally, LCI is contracting with an economist to conduct an analysis of the site to determine how many and what types of housing units will support the kind of retail and amenities that will make the project a truly vibrant TOD.

Revitalizing an Urban School and its Neighborhood The LCI also is partnering with the Richmond Children's Foundation (RCF) on an exciting project in a low-income, inner-city neighborhood in the city of Richmond. The RCF is a supporting foundation of EBCF that was created with money won from a General Chemical lawsuit settlement over a chemical spill that impacted the three neighborhoods represented in the project area. The Richmond Children's Foundation was initially focused on rebuilding the local elementary school, but EBCF encouraged them to broaden their scope to address the core quality of life issues that affect the ability of children and their families to learn and prosper in the community. The resulting Nystrom Neighborhood Initiative (named after Nystrom Elementary School) aims to substantively revitalize the area surrounding the school by building a vibrant and healthy community, one that serves the needs of the families and children who live there and is the foundation of a strong school/community partnership. The Initiative's first step is to conduct a year-long community planning process to determine what types of infrastructure improvements, services, and community resources the community desires and to develop an Action Plan to identify specific steps to help the community realize its shared vision.

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** Available as a resource on the subject of advocacy.*

Through these diverse efforts, LCI staff has honed their skills in the roles that add the most value to solving East Bay growth challenges. The LCI excels in the roles of convener, broker of technical assistance, educator, grantmaker and, most notably for a community foundation, advocate for the policies and projects that the Foundation believes will improve the quality of life for residents of the East Bay region.

Funding LCI Outside foundations have provided 90 percent of LCI's funding. Now that fewer private foundations are supporting work in the growth and development field in California, the LCI staff believes that building an internal donor base to support this work is critical to the sustainability of the Initiative, particularly given the long-term commitment required to affect real change on land-use issues. In the meantime, the Foundation has provided grants to and worked alongside many East Bay organizations working to improve livability in the area.

Prosperity! The North Coast Strategy

As a result of convening by and leadership of the Humboldt Area Foundation (HAF), business and civic leaders, environmentalists, and others have come together to create a region-wide economic development plan—*Prosperity*! The North Coast Strategy.

In 1997, the Humboldt Area Foundation created the Institute of the North Coast to convene the Northcoast Leadership Roundtable, consisting of business leaders from all parts of Humboldt County, to chart a course toward economic prosperity throughout their primarily rural region.

Regional Economy The Humboldt Area Foundation serves the northwestern-most counties of California, a region whose economy historically relied on seasonal industries such as forestry, fishing, and agriculture. In the early 1990s, law enforcement officials and social service providers showed the Foundation's board that rates of substance abuse and domestic violence were rising during seasonal layoffs.

Because HAF was not satisfied that its efforts were stemming the need for social services, the Foundation decided to expand its efforts toward diversifying the economy in an attempt to even-out the swings in employment and unemployment. In addition, it was prompted by an enormous loss of jobs that has plagued the area over the past three decades and the widespread perspective that the environment needs to stay healthy for residents, for tourism, and for the resource base itself.

North Coast Leadership Roundtable In 1997, the Humboldt Area Foundation created the Institute of the North Coast to convene the Northcoast Leadership Roundtable, consisting of business leaders from all parts of Humboldt County, to chart a course toward economic prosperity throughout their primarily rural region. Its plan identifies five key steps that businesses, the public sector, and others can take to strengthen the region's economy by integrating sustainable development concepts:

1. Develop an economic strategy to which all players agree.
2. Persuade economic development organizations to work together.
3. Create opportunities for business and government to work collaboratively.
4. Develop a message that emphasizes the positive aspects of living and doing business in Humboldt County and a companion external marketing strategy.
5. Tie land-use strategies throughout the county to quality of life, consistent with an economic development vision.

Founded:
1972
Total Assets:
$29 million
Percent Discretionary:
25 percent
Geographic Area:
*Humboldt, del Norte and Trinity counties, Calif.**

**also Mendocino County on policy work; however, Mendocino County has its own independent grantmaking foundation*

The Northcoast Leadership Roundtable subsequently educated itself by assembling data to determine the make-up of Humboldt's economy and by hosting a series of community conversations among a diverse group of over 200 business and civic leaders, including timber interests, ranchers, developers, environmentalists, educators, and others. The principal roles of the Humboldt Area Foundation were to convene the players and to provide valuable, timely, and sometimes provocative information.

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** Available as a resource on the subject of rural economic development.*

Prosperity! The North Coast Strategy

Under the auspices of HAF's Institute of the North Coast, the group created *Prosperity!* The North Coast Strategy, an economic development plan aimed at maintaining the livability of the Humboldt area and capitalizing on the region's competitive advantages, which include its proximity to resources and a cherished rural and small town quality of life.

In order to implement the five steps, Humboldt Area Foundation continues to convene and engage those who are needed to improve economic prosperity throughout the region. For instance, HAF has brought together different interests to participate in the county's General Plan update process. Another effort that the Foundation sponsors to accomplish these five steps is Redwood Forest Foundation, Inc. Redwood Forest is working to stabilize the region's primary industry—forestry—in a number of innovative ways, including an effort to pass federal legislation to allow purchase of industrial timberland by community-based organizations financed with tax-exempt bonds.

Another related effort is the Cascadia Leadership Training Institute—also a program of the Institute of the North Coast—that recognizes that leaders need to be trained to facilitate group dialogue on contentious issues in order to tackle issues of resource utilization, escalating unemployment, and impending population growth. Recently, the entire management staff of the County Office of Community Services (including Planning, Building, and Economic Development) participated in Cascadia training and, as a result, are integrating new practices in their respective departments.

The Institute of the North Coast was funded with a grant from The James Irvine Foundation, other grants for specific projects and, more recently, with the Humboldt Area Foundation's unrestricted funds. As funds from private foundations are becoming more difficult to come by, HAF is struggling with tensions created by having to decide between granting to the Institute (i.e., to support its rural economic development work) or granting directly to the community.

Agriculture and Housing: Leadership on Behalf of the Natural and Built Environments

The Marin Community Foundation's program areas are geared towards increasing sustainability, broadly defined, in Marin County in one way or another. Although for many area residents this term means only open space protection, the Foundation concentrates equally on finding creative ways to house current and future county residents—particularly low-income residents—within Marin's current development footprint, while also promoting social equity and maintaining the highest standards of environmental quality.

The Foundation's donors understand the nexus between preserving open space and the need to build housing within the county's developed areas. No donor has turned away from the Foundation as a result of its focus on increasing Marin's housing stock and protecting its agricultural character.

A 1986 court order moved the San Francisco Foundation's Buck Trust north across the Golden Gate Bridge to begin the Marin Community Foundation. The Trust has given Marin Community Foundation (MCF) the resources with which to take a long view of the effect of its investments.

All of Marin Community Foundation's discretionary funds, including those used to support its agricultural preservation and affordable housing work, are derived from the Buck Trust. The Foundation's donors understand the nexus between preserving open space and the need to build housing within the county's developed areas. No donor has turned away from the Foundation as a result of its focus on increasing Marin's housing stock and protecting its agricultural character.

Environment The Foundation's Environment program has been a part of many critical efforts throughout Marin County to protect open space, restore wetlands, and otherwise maintain and enhance the county's pristine environment. A key component of this effort is to help the agriculture community maintain the viability of farming, with the assistance of University of California Cooperative Extension (UCCE) and the Marin Agricultural Land Trust (MALT), among others. The Foundation also supports groups that connect urban areas with agriculture, particularly through the schools, and other programs to integrate the environment into school curriculum.

Housing The Foundation's Community Development program area has played a key role in supporting advocacy and creating a research base to build affordable housing on infill sites; increasing business community investment in affordable housing; and providing

Founded:
1986
Total Assets:
$1 billion
Percent Discretionary:
85 percent
Geographic Area:
Marin County, Calif.

tools to help local jurisdictions include feasible affordable housing projects in their local plans. For instance, MCF provided financial support to Marin County's Community Development Department to develop a best practices toolkit designed to help local governments include innovative ways to increase their stock of affordable housing in their respective Housing Element updates. In addition to grantmaking, MCF staff actively participates in the countywide Marin Housing Council, a coalition of affordable housing stakeholders who work together to support housing policy and build partnerships with the environmental community.

Due to Marin County's long history of support for the environment and open space, the challenge of advocating for development anywhere in Marin is a formidable task. One of Marin Community Foundation's housing highlights came in 2001 when the Foundation established a five-year housing strategy to support the development of affordable housing throughout the county. This strategy includes a widely circulated report; frequent presentations by MCF's board president and other trustees; participation by MCF staff in the county's General Plan update process; and a $10 million investment over the five-year period to build affordable housing, support policy work, and provide technical assistance.

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Creating a Bay Area Community Foundation Livable Communities Initiative

The San Francisco Bay Area encompasses hundreds of acres of productive dairy land, miles of spectacular coastline, established suburban towns, exurban sprawl, and the densest city in the western United States. The region also is home to six community foundations with significant discretionary funds.

Bay Area Livable Communities Initiative Led by The San Francisco Foundation's environment program officer and trustees at the East Bay Community Foundation and Marin Community Foundation, these community foundations have been meeting to identify opportunities for collaboration to improve quality of life in neighborhoods and at transit hubs throughout the region. The other community foundations initially involved in these discussions include the Marin Community Foundation, Peninsula Community Foundation, Community Foundation Sonoma County, and Community Foundation Silicon Valley.[9]

Although the group is now working to articulate the specific approach it will use to establish the collaborative, The San Francisco Foundation (TSFF) believes that the region's community foundations together can accomplish more than they can working in isolation. By bringing more dollars to the table in the collective pursuit of better communities throughout the Bay Area than each could individually, the collaborative can provide more leverage to influence future development. To be successful, though, it is essential that CEOs, trustees, and program officers across program areas at each foundation are excited about and involved with the effort. An important step toward this end is understanding how revitalizing neighborhoods and curbing suburban sprawl will help accomplish their foundation's goals, whether they are related to social justice, the environment, community development, the arts, community health, or education.

The San Francisco Foundation hopes that the participating community foundations will begin by identifying common goals for a collective effort and that each will contribute funding to develop a regional livable communities initiative for influencing development patterns across the Bay Area. The group then could identify place-based priority locations on which to focus across program areas. Eventually, the community foundations possibly could contribute funding for staff positions necessary to keep the initiative alive and effective.

Although the community foundations are in the early stages of developing a region-wide collaboration, in fact, various combinations have worked together in the past. In 2001, each contributed funding for a video communicating the perspectives of residents of the Bay Area's poorest neighborhoods on current development patterns. The video was a focal point of 20 smart growth visioning workshops that took place throughout the region.

Founded:
1948

Total Assets:
$758 million

Percent Unrestricted:
45 percent

Geographic Area:
San Francisco, Marin, Contra Costa, Alameda and San Mateo counties

[9] The San Francisco Foundation covers five core Bay Area counties: San Francisco, Marin, Contra Costa, Alameda and San Mateo. The service areas of three of the other community foundations overlap with TSFF: East Bay Community Foundation (separately profiled in this publication) serves Alameda and Contra Costa counties; Marin Community Foundation (also separately profiled) supports Marin County; and the focus of Peninsula Community Foundation is primarily San Mateo County. The service areas of Peninsula Community Foundation and Community Foundation Silicon Valley overlap in southern San Mateo and northern Santa Clara counties. Sonoma County Community Foundation's service area does not overlap with that of any other community foundation.

In 2003, four of the community foundations, The San Francisco Foundation, East Bay Community Foundation, Marin Community Foundation, and Peninsula Community Foundation, pooled funds to develop standards for quality environmental education in the Bay Area. The San Francisco Foundation also is working with East Bay Community Foundation in Richmond—a primarily industrial, low-income community in western Contra Costa County—to initiate a community planning process around neighborhood design that supports children's education, improved economic opportunities for the community, increased affordable housing, and improved parks and open spaces.

The San Francisco Foundation's intent is to build on these successes by bringing together all of the Bay Area's community foundations to think systematically about what they can do together. The service areas of some of the foundations pose one of the fledgling group's largest challenges. Although there is some overlap between the counties served by TSFF and those served by the other community foundations, to date resources of the other five rarely go outside their respective county lines.

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History and Status of the Effort The group had its inaugural meeting in late 2003. The Funders' Network for Smart Growth and Livable Communities commissioned a written scan to brief participants on the missions, priorities, and programs of each of the participating community foundations in advance of the meeting. Participants felt the meeting was a useful opportunity to meet one another and to begin thinking about common goals for the San Francisco Bay Area.

The second meeting of the Bay Area community foundations took place in spring 2004. At this historic gathering, participants supported the concept of creating a joint Bay Area Community Foundation Livable Communities Initiative and agreed that it is worthy of the time it will take to flesh out a business plan, including budget, fiscal agency, and institutional structure. The group hopes to complete these steps by the end of 2004.

The San Francisco Foundation has both internal and external motivations for this initiative. Within TSFF, it is hoped that such an effort will attract and involve all of its six program officers. To tackle region-wide growth issues effectively, all perspectives need to be considered and understood. Although it is difficult for each program officer to diverge from her or his focus due to significantly heavy workloads, it is thought that the participation of colleagues from the other community foundations discussing cross-area issues will attract TSFF program officers to the table.

Externally, The San Francisco Foundation anticipates that the community foundations together will be able to accomplish more than any could alone, particularly in the region-wide policy and planning arenas. By pooling grant dollars and by capitalizing on each foundation's local and regional contacts, reputation, and leadership roles within the Bay Area, TSFF anticipates a powerful partnership.

While still in the formative stages, this collaboration of community foundations will assuredly lead to joint endeavors that are worthwhile and relevant for each. Yet, even absent a common undertaking, the meetings are improving the ability of each to engage in local planning decisions by virtue of participants' better understanding of the regional context in which they all are working.

Program-Related Investments (PRIs): Achieving Financial Goals with Mission-Consistent Investment

In an effort to make homes more affordable to career employees of local nonprofits, the Santa Barbara Foundation (SBF) made a loan to the Santa Barbara Housing Authority for the purchase of downtown land on which below-market-rate condominiums will be built.

Knowing of Santa Barbara Foundation's interest, the executive director of the city's Housing Authority proposed in 2003 that the Foundation make a $3.5 million loan for the purchase of land on which 70-to-90 below-market-rate condominiums were to be built.

Growth in South Santa Barbara County In 1969, a major oil spill made Santa Barbara what many call the birthplace of the environmental movement. The efforts of environmentalists in the intervening three decades are often credited for the area's quality of life, and associated with spawning a no-growth movement that has contributed to an unintended consequence, which is a severe housing affordability crisis. Santa Barbara Foundation staff believe, however, that all but the most rigid local environmentalists are beginning to work with developers to address the crisis.

One result of little development in a period of economic growth has been a median housing price in southern Santa Barbara County of $925,000 (as of April 2004), the highest in California. Astronomic housing prices have forced 28,000 local workers and their families, including many public employees, to find housing outside the area. Due to the relatively isolated nature of development around Santa Barbara proper, this means long commutes from cities such as Ventura, Oxnard, Santa Maria, and Lompoc. One concern is that if a wildfire, earthquake, or other disaster were to occur, off-duty firefighters, police officers, and other essential service providers may not be able to access southern Santa Barbara County.

Among these workers include career employees of nonprofit agencies in south Santa Barbara County, who are similarly priced out of the local housing market. This situation has resulted in leadership turnover and difficulty in filling essential positions thus reducing the effectiveness of many of the organizations supported by the Santa Barbara Foundation.

Local decision-makers, fearful of following in the sprawling footsteps of Orange County and other Southern California sub-regions, are beginning to understand that creating **density** in infill locations is the key to avoiding sprawl development in Santa Barbara County. By late 2001, these issues had gained the attention of the chair of Santa Barbara Foundation's board of trustees. For the board's annual retreat, he invited a local realtor, a private developer, a nonprofit developer,

Founded:
1928
Total Assets:
$180 million
Percent Unrestricted:
55 percent
Geographic Area:
Santa Barbara County, Calif.

and the city of Santa Barbara's Housing Authority to make a presentation on affordable housing. This presentation led to the creation of a Housing Task Force which has kept the issue at the forefront of the Foundation's agenda ever since, culminating in an innovative project that simultaneously addresses the housing affordability crisis and boosts the Foundation's investment return.

Is it an Investment or a Program? Knowing of Santa Barbara Foundation's interest, the executive director of the city's Housing Authority proposed in 2003 that the Foundation make a $3.5 million loan for the purchase of land on which 70-to-90 below-market-rate condominiums were to be built. Due diligence revealed that this would be a low-risk loan given the Housing Authority's adequate cash flow to make loan payments and the fact that the loan was secured by the land.

Based on a recommendation from the Foundation's Investment Committee, the board agreed to the loan. The "investment" provides the Foundation with a return of 4 percent. In addition to earning a higher rate of return than its bond investments, the loan gives SBF the opportunity to provide input on the preference groups that might be targeted as potential residents, such as employees of local nonprofits who work in the downtown area. This project is looked at as an investment as well as a program—a unique perspective that may possibly allow this initial loan to become part of a revolving fund when it is repaid.

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The Santa Barbara Foundation anticipates that the Housing Authority project is only the beginning of this kind of work. Once built, it will undoubtedly generate a great deal of support and enthusiasm. In fact, this arrangement already has been so successful for all parties involved that the county Housing Authority recently approached the Foundation about the possibility of developing a similar program with them.

With a recent planning grant of $25,000 from the Washington Mutual Foundation, the Santa Barbara Foundation is currently assessing various roles it might play in addressing the affordable housing crisis, thereby assisting local nonprofit organizations attract and retain qualified and experienced professionals by improving housing opportunities for their employees.

Ventura County Civic Alliance: Creating Region-Wide Leadership and Vision

The Ventura County Community Foundation (VCCF) has convened civic leaders from throughout the county to create a process for identifying and taking on region-wide issues related to community growth and sustainability.

Identifying as a Region The residents and local governments of Ventura County, Calif., typically do not see the county as a single, cohesive region. Many people (over 12 percent of the population) commute from the county's relatively inexpensive housing to jobs in neighboring Santa Barbara and the San Fernando Valley near Los Angeles, a trend that has contributed to Ventura County's explosive population growth. Since 1980, the county's population has increased by over 100 percent to almost 800,000 and it is expected to grow to over one million by 2020. As housing prices increase (30 percent in the last year alone, over 80 percent in the last three years) and the distance residents commute lengthens, Ventura County and the rest of California is at risk of losing its middle class. Meanwhile, the discrepancies in income, education, and other measures of quality of life between the rich and poor grow.

Since its inception, one of the Ventura County Community Foundation's primary goals has been to improve quality of life in Ventura County as a region. By 2000, VCCF observed that Ventura County stood out as one of only a few of California's counties with no regional civic leadership structure engaged in broad visioning, program planning, and problem solving.

Ventura County Civic Alliance In 2001, the Foundation accepted funds from The James Irvine Foundation to create the Ventura County Civic Alliance to convene area leaders to mobilize people and civic organizations to work together across boundaries to analyze and address priority regional issues and challenges related to community growth and sustainability. The Alliance comprises 40 citizen leaders from each Ventura County community, each a representative of local business, environmental, and social equity groups. These "three E" elements are a crucial part of the Alliance process and are a factor in broad acceptance of their work.

The selection of Ventura County Civic Alliance participants was an especially unique dimension of this effort. At its nascent stage, the Civic Alliance was clear that it wanted the process driven by representatives of community-based groups and other "natural" local leaders, rather than locally elected officials. Yet it wanted city and county government to be aware of and to support the process. To maintain connection with elected leadership, Alliance members and staff met with each member of the board of supervisors and circulated to every mayor and city manager in the county a letter explaining the Alliance effort that contained a draft list of representatives and offered a presentation to any interested elected body. Key to gaining the support of elected officials throughout Ventura County was the Alliance's acknowledgment of the power of area residents and neighborhood groups opposed to change of any kind, and the Alliance's promise of hard data to help elected officials make difficult decisions in the future regarding growth and development.

The Ventura County Civic Alliance's first project was to develop an objective snapshot of quality of life in Ventura County using measures such as employment growth, acres of protected open space, and

Founded:
1987
Total Assets:
$50 million
Percent Unrestricted:
5 percent
Geographic Area:
Ventura County (including its 10 cities)

homelessness. Once completed, the Alliance and others used this report—called the *State of the Region Indicators Report* and jointly produced in 2003 with California Lutheran University—to identify challenges and design strategies and measure the effectiveness of efforts to improve quality of life for all residents over time. The Alliance has briefed every city and the county on the Indicators Report and disseminates it using their newly redesigned website, which also posts media articles on Ventura County quality of life issues and links to VCCF's webpage. Funding permitting, the Alliance plans to update the Indicators Report in 2005.

By 2004, the VCCA had used the Indicators Report as a basis to move to its second project, "Connect the Dots on Growth and Sustainability: What Do Current Trends Mean for Ventura County?," a study which estimates the cumulative impacts of the region's 11 adopted general plans. "Connecting the Dots" calculates that today five jobs are being created for every housing unit built and that only one in five families can afford to buy the average home, as well as spotlights trends in population growth, transportation infrastructure, and the mismatch between housing needs and housing production. The Alliance currently is using the report's findings to engage diverse groups in separate conversations and is planning community-wide conversations to discuss common themes that emerge from the smaller convenings, the most recent of which was in mid-September 2004. As part of its project, it has identified key strategies to deal with these five 'headline' issues and which reflect "3E" perspectives; it will be doing further research, engaging in dialog with specific elected officials, and presenting these strategies in a community conference in March 2005.

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Relationship to the Ventura County Community Foundation The Ventura County Civic Alliance is an initiative of the Ventura County Community Foundation. The Foundation board strongly supported the establishment of the Alliance, seeing it as a natural outgrowth of its core mission to preserve and improve quality of life in Ventura County and to build civic engagement. In fact, the current Alliance chair is a Foundation board member, as are two other Alliance members and the Foundation's president. The Alliance brings natural leaders together to understand each other's values and issues and to begin to help all parties to think regionally. The Civic Alliance has strengthened the Ventura County Community Foundation's reputation as a community convener.

The Ventura County Civic Alliance has been funded entirely by The James Irvine Foundation, under its Regional Collaboratives Initiative. That Initiative is scheduled to expire at the end of 2004. The Alliance has developed a three-pronged strategy for next generation funding, to include individual, institutional, and foundation funding. Early returns are impressive: 100 percent of the members have supported the Partners Program (even though they were not recruited to support the organization financially); there is a $15,000 1:2 match from a local business; and proposals to continue the next phase of the "Connect the Dots" program are currently being drafted. Other areas of interest for the Alliance include issues of civic engagement, economic disparity, and the issue of workforce preparation and education, particularly for this expensive region of coastal California. Thus far, VCCF has not provided operating support for the Alliance, but is dedicating significant staff resources to providing sustainable funding to ensure that this initiative, unique in a county with very few countywide institutions, and powerful in its capacity to make a difference in how Ventura County confronts its future, survives the initial funding investment.

Improving the Livability of the Vancouver Region

The Vancouver Foundation has helped the Vancouver region and the province of British Columbia become more livable in its role as a key supporter of a dynamic and effective nonprofit organization, Smart Growth B.C.

Whether a neighborhood improvement effort, a new urban greenspace, or a public arts initiative, efforts supported by the Vancouver Foundation were aimed, in one way or another, at improving the livability of the Vancouver metropolitan area and across the province of British Columbia.

Smart Growth B.C. When the terms "smart growth" and "livable communities" first came into vogue in the late 1990s, the Vancouver Foundation looked back on its grantmaking and noticed that many of the discretionary grants it had made through the years supported projects that, today, would fit into these categories. Whether a neighborhood improvement effort, a new urban greenspace, or a public arts initiative, efforts supported by the Vancouver Foundation were aimed, in one way or another, at improving the livability of the Vancouver metropolitan area and across the province of British Columbia. This trend accelerated with the 1999 grant request by Smart Growth B.C., a new nonprofit organization advocating for the creation of more livable communities in British Columbia.

The Vancouver Foundation is proud of the role it has played in the birth and growth of Smart Growth B.C. Its support began with a start-up grant to develop a British Columbia sprawl report and a second grant to hold the organization's first conference. Most recently, the Vancouver Foundation has given a grant to take Smart Growth B.C.'s message across the province and to establish a nationwide smart growth advocacy group.

During the same period that Smart Growth B.C. was being launched in British Columbia, federal policy increasingly was calling for revitalizing Canada's cities. In part, this trend of investing in more compact, less automobile-dependent development and transportation infrastructure was a result of Canada's commitment in the United Nations' Kyoto Protocol[10] to reduce greenhouse gas emissions.

Participatory Grantmaking While Canada's growing livability movement certainly inspired the Vancouver Foundation's support of similar efforts in the Vancouver area, another, more unique circumstance perhaps has had a more profound influence on the Foundation's values. Since it was founded, the Vancouver Foundation has had a rather unorthodox way of reviewing and

Founded:
1943
Total Assets:
$460 million (USD)
Percent Discretionary:
30 percent
Geographic Area:
Province of British Columbia, Canada

[10] The Kyoto Protocol was adopted to the United Nations Framework Convention on Climate Change. As of May 2004, it has 189 signatories (http://unfccc.int/).

selecting grants within its nine program areas. Grants in each area are reviewed and recommended to the Foundation's board by a volunteer advisory committee—chaired by a board member and made up of people in the field. The Vancouver Foundation believes it manages to stay ahead of trends by listening to community groups that are represented on these advisory committees. This is a unique participatory model that is based on the philosophy that expertise is in the field, where the advisory committee members are engaged. Foundation staff believe this structure brings the Vancouver Foundation closer to the community that they serve and gives them more credibility in the community than would a more traditional model of philanthropy.

Of course, this system relies on a strong conflict-of-interest policy. Advisory committee members are asked to declare when they have an interest in a proposed project and are not permitted to attend meetings where the application is being reviewed. Although preference for advisory committee members' projects has not been an issue thus far, discussions have cropped up from time-to-time about ways to strengthen the conflict-of-interest policy.

In addition to the influence these committees have over grants made from the Vancouver Foundation's unrestricted funds, another creative funding mechanism allows them even greater clout. Once each advisory committee has made its funding recommendations to the board at the conclusion of each grant cycle, donors have an opportunity to "purchase" all or portions of each grant. This process has the dual benefits of allowing donors to be closely linked to advisory committee priority efforts while freeing up unrestricted funds for previously under-funded efforts.

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** Available as a resource on the subject of community-based grant review.*

Initiatives of the Vancouver Foundation Apart from grantmaking, the Vancouver Foundation initiates projects as well. One of the most visible in recent years is its Community Dialogue Series. The four part series was organized around trends that were identified earlier by a Foundation-sponsored demographer: Canada's aging population; immigration vis-à-vis the country's negative birth rate; the dichotomy between British Columbia's urban and rural economies; and issues related to aboriginal (or "First Nation") rights. The Simon Fraser University-Wosk Centre for Dialogue provided space and facilitation and the Vancouver Foundation, using unrestricted funds, paid for the series' expenses. With the Community Dialogue Series, the Foundation engaged its advisory committee members and board members, informed its grantmaking, and raised its profile.

Whether through grantmaking or by holding community forums, the Vancouver Foundation takes its cues from the community that it serves. By listening to the needs raised by community leaders and by investing in efforts aimed at addressing them, the Foundation is a critical reason for the Vancouver metropolitan area's increasing livability and global popularity.

Conclusion and Summary

The trustees, CEOs, program officers, and other staff who informed the profiles in this report are pioneers in the realm of community foundation involvement in shaping how their regions grow. As outlined in the preceding pages, these organizations and leaders have shown that community foundations can be powerful forces and can exert a strong influence on the decisions that create local and regional growth patterns. These community foundations are accomplishing this by playing a number of relatively non-traditional roles including forming funders' collaboratives, identifying and convening key stakeholders, leading education campaigns, and meeting with and influencing decision-makers.

Beyond describing the history and scope of their programs and initiatives, many of these individuals also have offered advice to other community foundations considering expanding the role they have traditionally played in their communities and broadening the challenges they take on. This section outlines common themes in the advice that emerged during the interviews with representatives of the foundations profiled in this report.

Convene

Due to the respected position community foundations hold in their communities, and the breadth of contacts foundation staff have with grantees and other civic leaders, one of the most common roles community foundations play after grantmaking is that of convener. Often, meetings initiated by foundations offer the first opportunity for funders, decision-makers, and other community leaders to sit down face-to-face in pursuit of mutual goals. These gatherings provide an opportunity for participants to discuss issues, learn from each other and, sometimes, to come to consensus.

Foundations that have experience using their impartial voices to convene advise involving as many stakeholders as possible as early as possible. This inclusion allows projects to benefit from the diversity of perspectives represented in any community and gives efforts the breadth of support they will need to gain the attention and interest of additional funders. Moreover, experienced community foundations have found that "bridge-makers"—leaders who have the capacity to understand and speak the language of more than one sector—can help find solutions that are acceptable to a wider range of interests.

Many of the community foundations profiled in this publication have found that their role as convener was crucial for putting them in a position to later lead.

Listen and Learn

Foundations with experience as conveners advise doing a great deal of listening during the early phases of convening in order to understand the nature and complexity of issues and points of view related to growth in the community. Because growth and development issues play out differently based on local conditions and geography, foundations are advised to take the time to learn the different dimensions and perspectives of the challenges being discussed as well as the approaches being advocated by interested parties. One of the benefits to a community foundation that brings parties together is the opportunity to learn all sides of an issue.

Lead

Once a convening community foundation has gained an understanding of the points of view expressed at its meetings, experts say it is time to form an opinion. Is there a perspective that resonates with the mission and values of the foundation? Is a point of view absent from the discussion that could satisfy most parties? Are repercussions to the entire region being considered?

Time and time again, those interviewed for *Leading the Field, Volume 2* reiterated the value of taking a strong position and leading with it. If specific activities or goals emerge from these convenings, they suggest using staff to hold the community's feet to the fire to ensure that effective programs are planned and implemented. Furthermore, these experts feel that community foundations becoming active in influencing how their communities grow need to be willing to take risks, take heat on occasion, and be prepared for long term work: growth and development issues are not solved in one or even two grant cycles.

In most cases, determining a position to take on a particular issue will involve engaging and educating trustees, the CEO, and other staff members. Those with experience say that these discussions should include determining what the foundation's role—if any—will be. Will it continue to play an objective facilitator role or will it take a stand? If the foundation chooses to support a particular perspective or avenue, what form will this support take? Grantmaking? Education? Advocacy? In these discussions, it is always important to make the connection between the issues the foundation cares about—be it health, education, environmental justice, or the arts—and how land-use and transportation decisions directly or indirectly impact these issues.
A number of community foundations interviewed counsel that, to get involved in regional growth and development, it is important to accept that there is an advocacy element to the work. This often means engaging in public policy and working with local governments and other political bodies. Understanding what community foundations can do in this area is very important research early on in the process.

Even after a community foundation has chosen to allocate funding and staff resources to a particular effort, those with experience advise continuing to expand the group of participants. In addition, foundations that count educator among their responsibilities as convener many times use their resources to bring in experts to educate the community on the issues they think are important and provide additional resources and expertise on complex issues.

Finally, community foundations that are active conveners in the growth and development arena advise that foundations also need to be willing to abandon a particular effort if there is no traction in the community for the issue or for the foundation's position. Sometimes changing course is the best way to achieve progress.

* * * * * * *

The experiences of 25 diverse North American community foundations proves that community foundations are perfectly positioned to influence how the regions they serve will grow, should they decide to do it. With few exceptions, most of the profiled foundations initially began to explore development after recognizing that growth patterns are at the root of many of their historic issues of concern, areas like concentrated poverty, underachieving schools, obesity, and open space protection. As a result, these foundations have expanded the type of activities they fund and, in most cases, have extended their role well beyond grantmaking.

At the same time, most have found that their reputation as fair, respected leaders in their communities makes them ideally suited to lead efforts to create a vision and strategies for growth that represents and benefits all stakeholders in their communities.

The Funders' Network for Smart Growth and Livable Communities is honored to work with these leading community foundations and looks forward to helping to support their efforts—and those of other community foundations—in the years to come. For more information on the Network's Community Foundations Leadership Project, visit www.fundersnetwork.org.

Directory of Community Foundation Leadership Project (CFLP) Resources

Many of the interviewees whose work is profiled in this report have offered to serve as resources and be of assistance to their community foundation colleagues who are interested in learning more. The Funders' Network for Smart Growth and Livable Communities maintains a roster of these community foundation trustees, CEOs and program officers, organized by topic area, as follows.

Advocacy/Policy

Allison Brooks, Director
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East Bay Community Foundation (CA)
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Meredith Hatfield, Program Director
Livable New Hampshire
New Hampshire Charitable Foundation (NH)
(603) 225-6641 mah@nhcf.org

Joanne Walz
Community Philanthropy Officer
The Minneapolis Foundation (MN)
(612) 672-3878 JWalz@mplsfoundation.org

Collaborative Grantmaking

Ellen Gilligan, VP for Community Investment
The Greater Cincinnati Foundation (OH)
(513) 241-2880
gilligane@greatercincinnatifdn.org

Community Education

Evan Lowenstein[9], Executive Director
Common Good Planning Center
Rochester Area Community Foundation (NY)
(585) 442-2730 elowenstein@cgpc.org

Jennie Stephens[10], Senior Program Director
Coastal Community Foundation
of South Carolina (SC)
(843) 723-3635 jstephens@ccfgives.org

[9] Particularly, educating a community about the costs of sprawl.
[10] Particularly, educating low-income residents (especially on legal issues).

Community Organizing

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(843) 723-3635 jstephens@ccfgives.org

Community-Based Grant Review

Mauro Vescera, Program Director
Vancouver Foundation (BC)
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Convening

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Civic Affairs and Environment
The Cleveland Foundation (OH)
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Meredith Hatfield, Program Director
Livable New Hampshire
New Hampshire Charitable Foundation (NH)
(603) 225-6641 mah@nhcf.org

Downtown Revitalization

Elizabeth "Boo" Thomas, Director
Plan Baton Rouge
Baton Rouge Area Foundation (LA)
(225) 267-6300 planbr@braf.org

Economic Development

Angel Fernandez-Chavero
Philanthropic Engagement Officer
Community Foundation for
Greater New Haven (CT)
(203) 777-2386 ext. 216
afernandez@cfgnh.org

Energy Conservation

Richard Mappin, VP for Grantmaking
Berks County Community Foundation (PA)
(610) 685-2223 richardm@bccf.org

Environmental Programs
(building capacity of/for)

Arn Boezaart, VP for Grant Programs
Community Foundation for
Muskegon County (MI)
(231) 722-4538 aboezaart@cffmc.org

Initiatives
(supporting community foundation initiatives)

Jennifer Leonard, President
Rochester Area Community Foundation (NY)
(585) 271-4100 jleonard@racf.org

Leadership

Cheryl Casciani, Director of Programs
Baltimore Community Foundation (MD)
(410) 332-4172 ext. 140
ccasciani@bcf.org

Leveraging Public Funds

Tom Woiwode, Director
GreenWays Initiative
Community Foundation for
Southeastern Michigan (MI)
(313) 961-6675 twoiwode@cfsem.org

Linking Environment and Economy

Ben Johnson, President & CEO
Greater New Orleans Foundation (LA)
(504) 598-4663 benj@gnof.org

Municipalities
(working with)

Cheryl Casciani, Director of Programs
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Tracie Hines, Director
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Regional Cooperation

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Regional Trail Development

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Rural Economic Development

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Training

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Glossary of Terms

Affordable housing. Safe and sanitary shelter whose monthly rent or mortgage payment, including taxes, insurance, and utilities, does not exceed 30 percent of a household's gross annual income.

Big box retail. Retail development that typically occupies more than 50,000 square feet, with typical ranges between 90,000-200,000 square feet, that derives profits from high sales volumes rather than price mark up. Characterized by large windowless, single-story buildings with standardized facades, acres of parking, and site development lacking community or pedestrian amenities. Relies on auto-borne shoppers.

Brownfield. An industrial or commercial parcel that is abandoned or underused and often environmentally contaminated, especially one considered as a potential site for redevelopment.

Charrette. An intensive process involving a series of collaborative design and public input cycles for multiple, consecutive days. A central element of the charrette is the "design team," a multidisciplinary group of professionals that provide the necessary expertise to create a feasible plan that considers all relevant input.

Community assessment. Process whereby a neighborhood, town, or region is evaluated using an agreed-upon set of indicators.

Density. The average number of people, housing units, or structures per unit of land.

Gentrification. The impact of steadily rising housing prices as a result of neighborhood improvements, which can result in displacement of lower-income households.

Greenbelt. A ring of connected parks, farmland, and/or uncultivated land surrounding a community.

Greenfield. Undeveloped property, sometimes in agricultural use, that can be used for suburban development on the edges of or outside of existing urban areas.

Greyfield. An obsolete or abandoned retail or commercial site, usually a shopping mall.

Indicators. A series of easily measured community attributes—such as school dropout rates, air quality, acres of urbanized land, and health insurance coverage—that are used to identify and monitor progress on various aspects of the health of a community.

Infill. The use of vacant land and property within a built-up area for new construction or redevelopment.

Livability. Quality of an area as perceived by residents, employers, and visitors, including safety and health, environmental conditions, quality of social interactions, opportunities for recreation and entertainment, aesthetics, and existence of cultural and environmental resources.

Mixed-use. Multiple land uses, such as residential, retail, and office, combined in a structure, on a single parcel of land, or built adjacent to one another on multiple parcels.

New Urbanism. International movement to restore existing urban centers and towns, reconfigure sprawling suburbs into communities of real neighborhoods and diverse districts, conserve natural environments, preserve historic structures, and create compact new towns and villages.

NIMBY. An acronym for "Not In My Backyard," a term that describes people who oppose change in their neighborhood, sometimes regardless of the public good.

Open space. Undeveloped land or land that is used for recreation, including farmland and natural habitats (e.g., forests, fields, wetlands).

Regional and neighborhood equity. A learning and action framework designed to: a) reduce social and economic disparities among individuals, social groups, neighborhoods, and local jurisdictions within a metropolitan area; b) connect neighborhoods to regional and state public policy decision-making; and c) harness private markets opportunities for community benefits.

Social capital. The collective value of all "social networks" (who people know) and the inclinations that arise from these networks to do things for each other ("norms of reciprocity").

Smart growth. A series of policies and practices that result in well-planned development that protects open space and farmland, revitalizes communities, keeps housing affordable, and provides transportation choices.

Sprawl. The unplanned spread of urban development into areas beyond the edges of a city. Sprawl defines patterns of urban growth that include large acreage of low-density residential development, rigid separation between residential and commercial uses, development in rural areas away from urban centers, strip commercial development along highways, and minimal support for non-motorized or alternative transportation.

Sustainable development. Development with the goal of preserving environmental quality, natural resources and livability for present and future generations. Sustainable initiatives work to ensure efficient use of resources.

Transfer of Development Rights (TDRs). A system that gives owners of undeveloped parcels in non-urbanized areas—usually working farmland or ranchland—the option of transferring their development rights to urban lands in exchange for financial payments. In return, the property owners accept deed restrictions protecting their land from development in perpetuity. When these rights are purchased, not transferred, these programs are known as PDRs.

Transit-oriented development (TOD). The development of housing, commercial space, services, and job opportunities in close proximity to public transportation.

Urban Growth Boundary (UGB)/Urban limit line. A politically-determined boundary beyond which a jurisdiction prohibits development.

Walkability. Ability of an area's residents, workers, and visitors to reach common destinations on foot in a short amount of time. Walkable communities mix land uses, build compactly, and provide safe and inviting pedestrian corridors.

Workforce housing. Single-family and multi-family housing that is decent and affordable to all of a community's local workers.

Zoning. Classification of land by a community into different areas and districts, each with stipulated restrictions pertaining to such attributes as allowable land uses, building placement and density.

Funders' Network
For Smart Growth and Livable Communities

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Board Chair

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Expanding funders' abilities to support organizations working to build more livable communities through smarter growth policies and practices

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