

The twentieth anniversary of the Meyer Memorial Trust coincides with the retirement of its only executive director. Charles Rooks was present at the birth of this new foundation, helped it take its first steps, nurtured it through its early development, saw it through puberty and adolescence, and proudly watched as it reached the age of majority.

The son of a postal worker father and seamstress/bookkeeper mother in Whiteville, North Carolina, Charles began a career in academia after graduating from Wake Forest College in 1959 and earning master's and doctoral degrees in political science at Duke University in 1964 and 1968. Dissatisfied with academic life, within a few years Charles joined the Voter Education Project to register African American voters and assist newly elected black officials across the southern states before he entered the foundation field.

Prior to coming to Oregon to help establish the Trust, Charles Rooks directed the Southeastern Council of Foundations in Atlanta, Georgia, during the first years of its operation. Later he served as vice president and acting head of the Council on Foundations in Washington, D.C. He was still there in 1981 when Warne Nunn called him to say a new foundation was going to begin operating in Portland, Oregon, and asked if he could suggest names of people who might be good candidates to head it up. Charles offered several names, but a few months later Lyle Nelson—Thomas More Storke Distinguished Professor of Communication at Stanford University and a trustee with the Hewlett Foundation who had been helping the trustees lay the groundwork for the new Oregon foundation—called to tell him that his own name kept being suggested by people around the country. Charles politely replied that he would be happy to talk with him, but he didn't think he would be interested in moving his family across the country to begin an unknown venture. He knew how difficult and complex beginning a new foundation could be.

Several months later, Charles was on a plane to Portland, having accepted the position of executive director of the Fred Meyer Charitable Trust (as it was known until 1990). At his second interview, he had asked for a file of background material so he would know what had happened with regard to establishing the Trust after Fred Meyer had died in 1978. He had been so busy finishing up the job he was leaving at the Council on Foundations that he hadn't had

time to open the file until he was on the plane. “If I had had a parachute,” he recalls now, “I would have been out of the plane along about Denver.”

The file was full of press clippings outlining the legal disputes that had arisen among the five trustees Fred Meyer had named in his will to administer the charitable foundation. In addition to being personal representatives of the Fred Meyer estate, several of the trustees were also employees of Fred Meyer Inc., which complicated their relationships with one another and with the Trust. The legal issues had been largely resolved as Rooks took up his new position, but he wondered how this kind of beginning would affect the operation of the Trust.

We take up the story there. In his own words, from the perspective of long involvement in the world of foundations on the national level and as the sole executive director of the Meyer Trust, Charles reflects on the last 20 years, the first 20 years in the life of the Meyer Memorial Trust.

Because foundations face so little scrutiny from outside, we thought it would be useful to take a candid look at our first 20 years from the point of view of the person who has both the broadest and most intimate perspective on this early period.

In doing so, we gain much insight about where we’ve been and where we might want to go in the second 20 years.

– Marie Deatherage

Q Once you arrived in Portland and started operating the Trust, how did you feel about wishing you could have jumped from the plane that brought you here? Were things as difficult among the trustees as the newspaper reports had made them out to be?

A Many people outside the Trust expected the conflict associated with lawsuits that had two trustees on each side would continue into the Trust's board room. They also expected that trustee votes would split along the same lines as in the courtroom. But this never happened. I think the trustees wanted to put that chapter behind them, and the very nature of a charitable trust gave them a more positive thing to focus on; their attention was drawn to how to benefit the community, not their past rivalries. Of course there were split votes on many grant proposals, but the division was almost never along the lines of the legal battles.

Rather than bringing conflict into the board room, the earlier disputes promoted an effort to get along with one another. I sometimes thought that the trustees went too far in trying to be harmonious. There were times when more debate might have been helpful to the development of the Trust. The concern about avoiding old conflicts was a very powerful influence on the board for many years.

What was the public perception of the new Fred Meyer Charitable Trust when it first opened its doors?

Huge expectations had been building for four years, ever since the newspaper reported in 1978 that Mr. Meyer had left much of his estate to create a charitable trust. A lot of organizations seemed to see this as the answer to all their needs. There was no information on how the Trust would operate, so this air of mystery fed a lot of fantasies, especially among those who had little experience with foundations.

Ever since Mr. Meyer died, proposals had been coming in. They were in the lawyers' offices, the accountants' offices, the trustees' offices, all over town. Some were four years old by the time I got here. As soon as we could, in fall of 1982, we distributed guidelines on how we would initially operate. These related to



From left, original trustees Gerry Pratt, O.B. Robertson, Pauline Lawrence, Travis Cross, and Warne Nunn gather around a bust of Fred Meyer, the man behind the Trust.

procedures, not to the types of activities the Trust wanted to fund. This helped some, but for a long time we kept encountering expectations and dreams that were way beyond anything possible.

Another expectation was that the legal battles would put the Trust in turmoil. For years I would meet people and the first thing they would say was 'How are you holding up? How are you keeping a lid on this?' I appreciated their sympathy and support but, as I already mentioned, their perception about what was going on was wrong.

There is a lot more sophistication among Oregon nonprofits now than there was back then. There were just so many unrealistic expectations. I made a number of speeches in those early days, trying to convey information on how foundations operated and how we were going to operate. I would frequently borrow a Dwight MacDonald phrase from his book on the Ford Foundation: 'It's a large body of money completely surrounded by those who want some of it.'

How did the decision to focus on Oregon come about?

We received something like 1,100 proposals during the first few months. I realized I had to indicate what we were up against, so I had all those proposals stacked in the conference room at the next board meeting. There were several stacks two or three feet high, which made the point. We just had to figure out some way to deal with this avalanche. And it was clear that the trustees were more interested in the local ones. So we decided that until we had some focus that would narrow the range, we would just do Oregon and southwest Washington.

How much effect did the fact that the first trustees knew Fred Meyer well have on the decisions the trustees made?

That's a really difficult question because there are all kinds of answers. I think they all certainly felt a sense of responsibility. I think some of them felt that very strongly. But it didn't always translate into doing things that they felt he might have done, or not doing things he might not have wanted.

In addition to the will, he left a memo saying 'Here are some things I would like you to consider.' He emphasized that it was their call, he wanted them to keep up with the changing times, so these were not instructions. And then he laid out this wide array of activities. I'm quite confident I could fit almost anything that came along under some aspect of this. Because of its nature, and his emphasis on the trustees' responsibility to make up their own minds, this memo never had much influence. There were a few times when a trustee would sheepishly say, 'You know, Fred Meyer is probably turning over in his grave with this one!'

The original five trustees had very successful careers but each came from very humble means. What effect do you think that had on the way the Trust developed and operated? Generally speaking, how do you see the prior life experiences of trustees playing out in their decision making?

One effect was that they had some understanding of what being poor or disadvantaged was really like, so they had more empathy for a lot of the recipients connected with social service proposals, and they funded quite a number of them. While most of them had acquired a taste—or at least a sense of civic responsibility—for some of the activities that we tend to label 'elitist,' they were not socialized as elitist and they displayed support for both the 'elitist' type of activities and for those aimed at the disadvantaged. They frequently spoke with real emotion about some of the problems they had seen or their friends had experienced.

Because of this influence from their personal backgrounds, they frequently surprised me in the early days. Most of the trustees were Republicans, but they didn't act like many of the Republicans I had known in the South. They were supportive of many things that I wouldn't have expected based just on their political affiliation.

I think their backgrounds also helped us achieve a relatively modest type of persona regarding the way we thought of ourselves and the way we tried to position ourselves in the community.

I think their background may also have been part of the reason they always seemed to have a fondness for small towns and small organizations. They might make a million dollar grant to an arts organization or a private college, but they frequently got more kick out of a \$20,000 grant to something in Helix or Weston.

1978

Fred Meyer died. Left personal estate of Fred Meyer Inc. stock worth \$63 million to establish a private foundation. His will named five trustees: Paul Boley (not pictured), Pauline Lawrence, Warne Nunn, Gerry Pratt, O.B. Robertson.



Lyle Nelson's name frequently comes up in any discussion of the early years at the Trust. Who was he and what was his role at the Trust?

Lyle was a native of Yamhill County who had had a very distinguished career in education and public affairs. In 1982 he was head of the Communications Department at Stanford and the holder of an endowed chair. He was also on the boards of the Hewlett and Reuters foundations. Travis Cross knew him and suggested to the trustees that he might be helpful to them in setting up the Trust. He did a number of things to get the Trust started, including handling the search for an executive director, which brought me here. Until his death in 1997, he continued to play a very important role. He was very wise and very skilled as a diplomat. Everybody, board and staff, trusted him and enjoyed him. At many critical points he came in and helped us through one kind of problem or another. He also used his vast contacts to refer us to various experts when we needed outside consultation on difficult grant proposals. He was a great confidant and friend to me, and I am forever indebted to him for all the ways he helped me personally and in my role at the Trust. Countless times conversations with him helped me through difficult periods. Also, the staff loved him.

It is impossible to really calculate his full value to the development of the Trust and to the well-being of many of us associated with the Trust. I can't really imagine how the Trust could have done as well as it has without the involvement of Lyle.



Lyle Nelson

What do you see as the most notable developments in the trust history during its first five years (1982-86)?

A big achievement during those years was learning a lot more about how a foundation develops and operates. Our trustees were all new to the field, and I had never run a foundation, although I had had a great deal of exposure to the field. We had to learn about one another's values and styles and how this group of individuals — trustees and staff — could work together. This was not always easy. There were some rough spots when different viewpoints collided and communication broke down.

Also the Trust went through a very traumatic experience when a dismissed employee went to the Attorney General with a laundry list of complaints against the Trust. Some of the accusations seemed to be serious enough to warrant an investigation, which went on for almost a year. At the end, the AG's report said two trustees had used their offices at the Trust in an improper manner and that one had communicated improperly with one of the Trust's investment firms. As a result of the investigation, the Trust adopted procedures to prevent such occurrences. Immediately following that, we faced a wrongful dismissal lawsuit from the same former employee, but this was eventually dismissed.

Although this was a painful experience for everyone, it had many positive benefits. It really drew the board and staff together and emphasized things to avoid in the future.

Another important development during the first five years was the launching of three focused programs that covered five northwestern states. They were related to cooperative development of libraries, technology in higher education, and supporting the independence of the elderly. At the same time we were improving our procedures for dealing with General Purpose grants in Oregon.

Fred Meyer stock increased in value to \$120 million as the result of a leveraged buyout.

Travis Cross was named to replace Paul Boley, who resigned.



1981

What about the second five years (1987-92)?

The focused regional programs, which accounted for more than 40% of our grant dollars at the beginning of this period, were largely phased out by the end of this period. However, we initiated a new regional program for children at risk, which continued for several more years. We also started our Small Grants program in Oregon during this time and extended our reach into more parts of the state.

I think during the second five years the trustees began to feel a lot more comfortable in their roles. During the first few years they were much more in a learning mode, but by now they felt pretty well oriented and were willing to rely much more on their own instincts. They found they didn't like the focused programs very much, and the Trust began to pull back more and more from the Pacific Northwest region and concentrate on Oregon.

And the third five years (1993-97)?

The value of our assets had been increasing almost every year since we started, but they began an even steeper climb near the end of this period.

The last of our regional programs, the one for children, came to an end. But then we started a new focused program early in this period—our Support for Teacher Initiatives—that consisted of small grants to help teachers in Oregon and Clark County, Washington.

It was the period when the Trust settled into being almost exclusively a foundation that responds to a multitude of different types of requests from essentially one state. This approach seemed to fit the trustees' preferences, and I think it was a period in which the board felt quite satisfied with what the Trust was doing.

In the middle of this period we had the first change on the board. Pauline Lawrence retired, and Debbie Craig was appointed. Two years later John Emrick was chosen when Travis Cross retired.

What about the most recent five years (1998-2002)?

The last five years were most significantly characterized by gradual change on the board and dramatic growth in the level of our grantmaking.

Another new trustee, Orcilia Zúñiga Forbes, was named to replace O.B. Robertson after his death in 1999. At that point the second generation trustees were a majority of the five-person board. As the new trustees came in, I could begin to see small changes; some proposals were approved that might not have been earlier and some were turned down that might previously have been funded. But there were no large-scale fundamental changes.

With each change in such a small group, there is an altered mix of values, experiences, and styles. And some change in group dynamics. The original board went through a rather extensive experience of learning about the foundation field in the early years. A number of distinguished foundation leaders from around the country visited with us, and the board visited several foundations in other places. The newer trustees had not had those experiences, although they had considerable experience in the philanthropic world. One of the effects of the entry of the newer trustees was that they wanted a lot more information. They asked the staff to prepare a number of briefing papers, sometimes on past activities of the Trust, and sometimes on other issues.

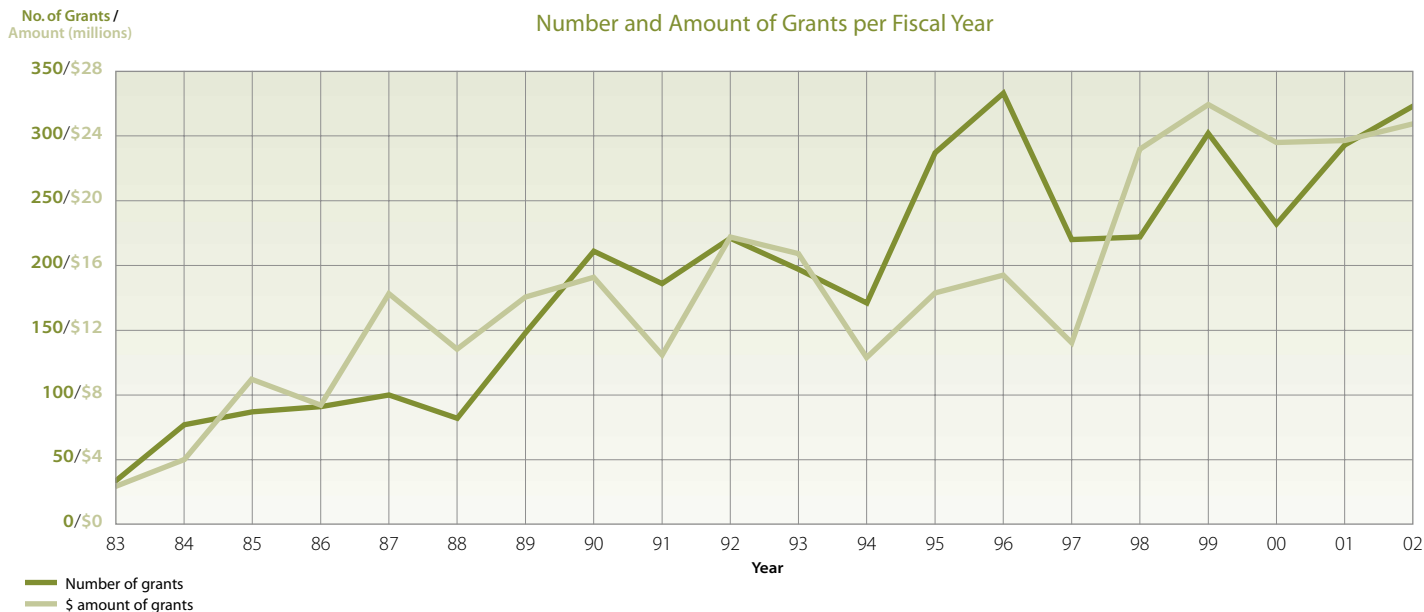
When I informed the trustees last year of my plans to retire, they recognized the need to reflect on where the Trust might go in the future before they could decide what kind of person should replace me as executive director. During the next few months we had presentations from other foundation leaders and a series of retreats. It was a situation in which the second generation trustees had to think about the various options available to a foundation and their own inclinations toward different approaches to grantmaking. It was also important to identify what things about current operations they valued and wanted to maintain. While

1982

Grants ranged from \$4,000 for a family-centered therapy program at Infant Hearing Resource to \$1,000,000 to help construct the Portland Center for the Performing Arts.

Charles Rooks hired as Executive Director; Trust officially opened its doors.





the two original trustees continued to play a very important role, it was recognized that the younger trustees had to take on greater responsibility for the future.

The other big change was a jump in the amount of our annual grants. As our assets grew, naturally our payout increased. In recent years we have been granting \$23 to \$25 million per year. When we started, we expected to grant between \$5 and \$6 million annually!

What do you predict for the next five years?

I don't! But there is potential for significant changes. The activities of the last year or so have created a platform that could be the start of some new directions. I'm not saying such and such will

almost certainly occur, because no one really knows that at this moment. But one thing that has been discussed with some interest includes having the Trust take more initiative in addressing certain issues. This might involve a formal, publicly announced program focused on particular outcomes in a given field, or it might be more informal efforts where the Trust develops responses to an identified need that go beyond proposals that come in on their own. I think there may be a tendency to be—for more than 20 years I've avoided using this word, but now I'll cave in—more 'proactive' than in the past. I'm pretty confident that the Trust will continue to operate a general purpose program wide open to all kinds of things with part of its resources, but this may be

Fiscal Year End Assets: \$143 million
34 grants for \$2.4 million

1983

Grants ranged from \$4,400 for a science enrichment program for low income students in Lane County to \$600,000 to the Trust for Public Land to preserve land in the Columbia Gorge.

mixed with more focused grantmaking.

Another change is that the Meyer Trust will not be such a dominant player in the Oregon foundation field as it was in the beginning. In 1983 we represented over half of the foundation assets in Oregon and about 25% of those in the Northwest. Now, just in Oregon, there are large new players like the Ford Family and Schnitzer foundations. Others like the Oregon Community and Collins foundations have grown substantially, and there are more and more foundations coming on the scene. So, even though we are about four times larger than when we started, we are a much smaller part of the state's philanthropic resources now.

What effect do you think this expansion of the field will have on the Trust?

Well, I think it could encourage the Meyer Trust more often to look for partners in funding things and not feel it has to do so much by itself. It could also promote a little more daring behavior because there are more players that can do some of the 'basic' things we've been doing, and that might free up the Trust to try more new things.

Has the Trust been involved in supporting the growth of philanthropy in the region?

From our beginning, we have tried to be helpful to new foundations starting up, and in recent years we have put quite a bit of time and money into a more organized effort to encourage people to be more philanthropic. I helped start the Northwest Giving Project, which was a three-year program by two regional associations of grantmakers, Philanthropy Northwest in Seattle and Grantmakers of Oregon and Southwest Washington in Portland. In addition to my time, the Trust also made a sizable grant for these activities, which have now been incorporated into the basic



The Trust for Public Land used Trust grants to preserve scenic land in the Columbia River Gorge.

functions of these two associations. We've produced numerous programs and materials designed to teach and encourage people about philanthropy. You can't really measure the results of something like this in the short run, but I think we have helped plant some seeds that will bear fruit over time.

Trust staff members have been quite active in the two regional associations. I played a major role in organizing the Portland one, and served on the board of the one in Seattle for several years. The basic purpose of these organizations is to help foundations and giving programs operate more effectively. Privately, Trust staff members have assisted a number of individuals and families in setting up foundations.

1984

Fiscal Year End Assets: \$147 million
77 grants for \$4 million

Grants ranged from \$964 for a work experience public service radio program at KBPS-AM/FM to \$1,000,000 for the Mark Hatfield Library at Willamette University.

Focused grants programs began
(see list on page 32).

How would you assess the first 20 years of the financial side of the Trust's operations?

The two sides of foundation operations—grantmaking and financial management—are interconnected because obviously, the more successful your investments, the more you have for grantmaking. From the outset the Meyer trustees were very concerned about good stewardship of the corpus left by Mr. Meyer. Even before the Trust formally started, they engaged a highly respected consulting firm to advise them on developing investment policies and selecting money managers. While some of the trustees were experienced and successful personal investors, they recognized the wisdom of placing all the investments with outside professionals. But they paid very close attention to the managers' performances. In addition to in-house monitoring, the Trust also engaged a professional firm to provide periodic evaluations of how the managers were doing, not only against the markets, but in comparison with managers of similar style.

How have the Trust managers performed?

I think we have an excellent record. Since inception, we have an annualized return of 13.4%. From approximately \$120 million in 1982, our assets have grown to about \$475 million, and this is after spending more than \$300 million on grants and expenses during these 20 years.

What do you think accounts for this record?

There are several elements. The trustees hired very good managers, and they replaced those few who didn't perform well. Secondly, we developed quite a diversified portfolio, including such 'alternative' investments as venture capital, real estate, special credits (or 'distressed securities'), leveraged buyouts, and hedge funds.

These were in addition to domestic and international equities and fixed income. Over two decades we have seen how some sectors may hit a rough period while others do well. This diversification meant that there were periods when we were lagging behind one component or another of the market, but we didn't suffer the big crashes that some of the once high-flying portfolios had when the markets changed.

Another factor in our success has been the careful attention to investment matters by the trustees, including careful monitoring of manager performance and periodic evaluation of asset allocation, which means asking whether we have the right division of assets in the various forms of investment. The board has spent almost as much meeting time on investments as it has on grantmaking, and I don't think that is typical for foundations.

Wayne Pierson, the Trust's chief financial officer, has also done an outstanding job of keeping the trustees informed, maintaining a good relationship with our managers, and raising important questions at key times.

And last, but certainly not least, we were very lucky to receive Mr. Meyer's bequest at the beginning of a long bull market.

In a person's life, age 20 is seen as kind of a coming-of-age time when a person is reaching maturity. I'm wondering if that is an appropriate analogy for a foundation. What developmental stage do you think the Meyer Trust has reached at age 20?

Hmm... Interesting question. Well, I think that a certain amount of time has to pass as the board and staff learn about one another and about what they really want to do. I don't know how many years that normally takes. It seems like some foundations come out of the box much more quickly than others. I also think foundations can regress, as humans can in some ways, so 21 to 30 isn't necessarily a more mature or productive stage than 10 to 20.

Fiscal Year End Assets: \$172 million
87 grants for \$9 million

1985

Grants ranged from \$1,800 for English classes for Hispanics in the Woodburn area to \$1,000,000 to establish the Fred Meyer Chair of Retailing at Brigham Young University.

As I indicated earlier, the Meyer Trust may be on the threshold of another phase of development. The transition from the original board to a new set of trustees will surely bring changes, but we'll just have to wait and see what form this takes.

What has been the effect on the Trust of having one executive director through the first 20 years of its existence?

Well, this will sound self-serving, but I have thought about it a great deal. Many, many times I have questioned whether I should stay on at the Trust and whether someone else might accomplish things I had not. But I came to believe that I was probably as good a person as they could have found for this job during these years. I had a good knowledge of the foundation field, which was very useful in getting things started. I had credibility and standing in the field, which gave weight to what I said to the board. And I had the patience and long view that enabled me to stay on through some tough spots. Others might have excelled in one of those characteristics, but I'm not sure anyone else could have brought a better combination to the table.

I also recognized early on that, while the trustees wanted me to be a good public representative of the Trust, there could be problems if I assumed too prominent a role in the community. Given the board's perspective on its role and the dynamics within the board, I thought I could have a more beneficial influence if I stayed out of the limelight and avoided any impression that I was leading the way of this foundation. I don't have personal needs that require public attention, and the top of my agenda was trying to make this as good an institution as I could, so this worked out fairly well, I think.

I tried from the outset to establish high standards and aspirations. And, despite the episode with the Attorney General, the board wanted those things too. They wanted to be proud of the Trust, both for themselves and for Mr. Meyer. As they began

to get good feedback from the community, that people respected what we were doing, this reinforced their desire to do a good job.

I initially thought I would stay in the job no more than seven to ten years. But as things developed, there were a variety of reasons to extend that. At some point the trustees saw that change was coming on the board and thought I was important in maintaining stability through this period of change, so I made a commitment to do so. This was not only for reasons related to the Trust; by then I had succumbed to the disease that so many get in Portland and didn't really want to move elsewhere.

In the beginning, you urged the trustees to adopt focused grant-making programs. What were your reasons for doing so?

The conventional wisdom in the foundation field 20 years ago, and today, is that a foundation can have more impact with this approach. I had read warnings about the dangers of squandering resources through 'scatteration.' I believed that the best practice was for a foundation to decide what fields it wanted to have a significant impact in, establish particular goals within those fields, develop strategies to reach these goals, and clearly communicate guidelines to the grantseeking public. Under this approach, you discourage proposals from those whose interests don't fit yours and you encourage others to bring you their best thinking as it relates to the foundation's goals. As we faced an avalanche of requests of all kinds from all over the Northwest, I also argued that we couldn't work in a large geographical area without narrowing the range of what we would look at.

What are your views on focused vs. general purpose grantmaking now?

Well, I've gained a lot more respect for the virtues of general purpose grantmaking than I had originally. I've seen this approach in action, and I know firsthand some of the important accomplish-

1986

Fiscal Year End Assets: \$222 million
91 grants for \$7.4 million

Grants ranged from \$2,800 for emergency medical services in Wasco County to \$1,500,000 to help construct the Oregon Coast Aquarium in Newport.

ments that are possible. Some of the Trust's most interesting and significant achievements are in areas that probably would never have been part of any focused program we might have established. We created the impression that there were no predetermined limits on what we would consider and this brought to us some interesting opportunities.

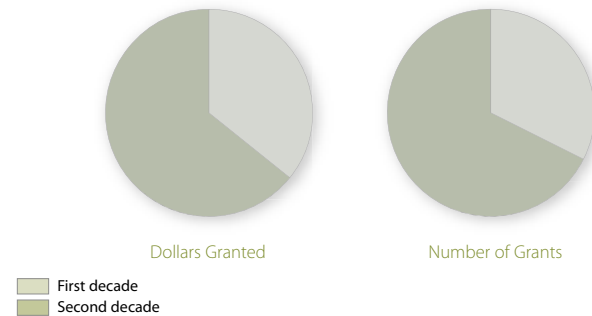
I guess you could say that we have had a geographic focus; we have concentrated substantial resources on a limited locale and thus have had an impact that wouldn't be possible if the dollars had been dispersed over a much larger territory. Supporting several different aspects of a particular community over many years can sometimes have an effect, I believe, that is greater than the sum of the direct effects of the individual grants.

But I also still believe strongly in the virtues of a well-planned and well-executed focused program. Many so-called focused programs are not particularly effective and are not as good as some general purpose programs. I still think a carefully targeted strategic approach can accomplish things that a more wide open approach can't.

But doesn't the Trust take the position that because it doesn't do a directive kind of grantmaking, it gets a genuine reflection of community need because it is the community rather than a foundation that is identifying what needs to be done and how to do it?

Well, part of that is rhetoric that makes what you're doing sound and feel good. But there is a fair amount of truth in it also. Our openness to all kinds of projects encouraged some people to bring us very creative proposals. At the same time, this approach results in a lot of routine, unimaginative requests. The lack of guidelines about a foundation's strongest interests removes the stimulus that can sometimes happen when people know a foundation is serious about certain goals and they consequently invest a lot of energy in developing ideas targeting those goals.

Grants by Decade



Another shortcoming of the lack of focused guidelines is that people study our grants lists and draw their own conclusions, correctly or incorrectly, about what the foundation wants to fund. A good example of this is that over several years we found ourselves receiving more and more large capital requests. Why was this happening? Well, I think part of the reason was that we had been granting more money for such projects, and this created an upward spiral of requests. Some organizations might have preferred to pursue another project of equal or greater importance to them but perceived that we obviously liked capital grants and submitted what they thought would most likely be funded. I'm not knocking all capital projects. Many of them are very important. I'm just making the point that our behavior can unwittingly influence what the community brings to us.

One further point on this. There may well be times when no one approaches foundations about pressing needs in the community. There are ways a foundation might encourage a response to some of these issues. I like the idea of being receptive to the best thinking in the community, but sometimes foundations may need to stimulate this thinking. When a foundation is totally reactive, it may rob itself of exciting possibilities.

Fiscal Year End Assets: \$252 million
100 grants for \$14.3 million

1987

Grants ranged from \$1,000 to help restore a historic covered bridge near Stayton to \$1,250,000 to support biomedical research projects.

Special Focus Programs

Program	Years	No. of Grants	Amount
Higher Education in an Information Society	1984-85	10	\$2,148,327
Library & Information Resources for the Northwest	1984-87	39	\$3,450,888
Aging & Independence	1984-89	67	\$8,484,726
Children at Risk	1986-96	176	\$22,502,958

Why did the Trust's focused programs end?

One answer is that the trustees found they didn't like that approach. For the most part, I think they had a greater interest in Oregon than the other states. After a period of exposure, the subject matter of these programs may not have held the interest initially expected. And I believe some of them didn't like the way these programs were structured and operated. By their nature such approaches to grantmaking have to be more organized than general purpose grantmaking. They have rules and procedures, and one could find this too 'bureaucratic.' Perhaps another reason was that some of the grants in these programs related to public policy or efforts to change systems, and I think the trustees favored grants that provided direct services and more immediate and concrete benefits.

Have there been any notable changes over the 20-year period in the needs the Meyer Trust gets asked to address?

There have been some substantial changes in the public policy arena during this time, and those certainly affected the environment in which many of our grantees operated, and this affected what these organizations could do. For example, both Reagan administration policies and Oregon's property tax limitation had

noticeable impacts on many activities conducted by nonprofit organizations. In turn, this influenced what they sought from foundations. Budget cutbacks caused many organizations to rein in any thoughts about innovation because they had to focus on survival.

I mentioned a moment ago that in recent years we have received many more requests for capital projects than earlier. Another change in the last decade is that we have been increasing our support for what we call 'capacity building' grants. As nonprofits see we are willing to make this kind of grant, we have received more requests. And, of course, when we dropped the focused programs, this discouraged certain types of requests.

But in lots of ways there hasn't been a lot of change. There are many consistent strands since the beginning.

You mentioned government budget cutbacks. How should foundations respond to the problems caused by them?

That is not an easy question, and it has come up a number of times over the last couple of decades. Just a few days ago I was reading about some of the hardships caused by cutbacks and the current economic recession in Oregon, and I found myself pondering some things the Trust might possibly do. But in these

1988

Fiscal Year End Assets: \$239 million
82 grants for \$10.8 million

Grants ranged from \$500 for books on parenting for new mothers at Lebanon Hospital to \$1,000,000 to renovate the Portland Art Museum.

500th grant awarded.

Small Grants program began in order to make Trust grants more accessible to smaller organizations.

Grants total passed \$50 million mark.

situations you have to stop and give such reactions a second thought. First of all, foundation funds are so infinitesimal compared to the size of government cutbacks that we couldn't begin to fill the holes, even if we thought this was a good thing to do. If you step in and try to meet an emergency situation, how and when do you exit? Even when public finances improve, will government want to come back and relieve you of this burden, given all the other demands it faces?

There is another consideration that sometimes gets overlooked in the call for foundations to step in and replace government cutbacks. Foundations are always facing far more requests from worthwhile projects than we can fund, and we constantly have to turn aside many very legitimate needs. There seems to be an automatic assumption in some people's minds that the needs created by government cutbacks are more important than the ones we are already dealing with. I don't usually agree with that attitude. If we drop our support for those programs we have been supporting, then we just create a new or expanded need in those areas.

Could you pick out a few grants from the Trust's first 20 years that would illustrate some of the important things the Trust has intended to accomplish with its grantmaking?

I am very proud of quite a number of grants; many of them had really significant results. It's hard to pick just a few. I hope people won't think that omission from this answer means I don't have a high regard for their projects.

One of the things many foundations like to do is support the start-up of a valuable new idea or institution that thrives after grant funds are spent. One of my favorite grants of this type was our early support for the Oregon Coast Aquarium. It was really just a concept when some people from Newport visited us around the end of 1984 or early 1985. We were intrigued with their vision

and commitment, and made a \$28,500 grant for them to do a feasibility study. After this was completed and looked encouraging, we decided to bet on this venture and approved a \$1.5 million challenge grant. At that point they had very little other funding. But they used our challenge, and the increased credibility it gave them, to eventually build an outstanding facility that cost over \$20 million. Early on they encountered an awful lot of skepticism about the viability of their vision, and I am not sure the Aquarium would ever have come into existence if we hadn't made our early investment. It is certainly a great addition to Oregon and is especially valuable to the Newport area, which was kind of in the doldrums when this project started.

That also sounds like a good example of leveraging a grant.

It was. Another favorite example of leveraging was the grant to help start the Campaign for Equal Justice. In the wake of federal cutbacks, Oregon Legal Services saw the need for a substantial increase in private giving in order to maintain their work with the poor. We made a \$750,000 challenge grant that had to be matched dollar for dollar by contributions from lawyers. (See page 85 for additional information.) While attorneys surely could understand the need to extend legal services to low income clients, this profession had not been particularly heavy financial contributors to such services. The Campaign for Equal Justice was a great success. Its leaders used the incentive of our challenge grant to encourage lawyers all over the state to step forward and help. And, just as we had expected, many of those who contributed during the first campaign remained supporters in subsequent years. Oregon's experience with this venture became a national model. What intrigued us at the Trust was not only that legal services are an important element in our society, but also that this was an opportunity to help an organization create relationships that would continue to benefit it long after our input was over.

Fiscal Year End Assets: \$256 million
148 grants for \$14.1 million

1989

Grants ranged from \$1,000 for musical instruments for Ashland's Pinehurst Elementary School to \$2,000,000 to help build a new facility for the Oregon Museum of Science & Industry.

Are most of the Trust's awards challenge grants?

Not at all, although we have used this technique quite a bit. There are several good reasons for requiring a match to qualify for funds, but in a number of situations it isn't appropriate and isn't helpful. Sometimes we come in at a much later point, only after we have seen significant support from an organization's community or natural clientele. A good example of that was our support in helping develop the Ross Ragland Theatre in Klamath Falls into a performing arts center. (See page 57 for additional information.) We initially turned down a request for this project, but later the founders came back to us and showed tremendous local support, and we made a \$250,000 grant. They had not only raised significant contributions from local individuals and businesses, but even school kids were carrying out projects to raise funds. We were happy to join in the effort when we saw how strong and wide-spread the interest was in its own community.

Are there examples when the Trust was an early supporter without making a challenge grant?

Oh sure. Sometimes we think a project is very valuable, but recognize that there is no definite group that can be expected to give it early support. I'm very glad we've been willing to take the lead on some of these. A good example is Trust for Public Land's (TPL) work in the Columbia River Gorge. There were a lot of people who cared deeply about the Gorge, but they weren't mobilized or able to provide large sums for TPL's early work there. Remember too that TPL didn't have offices in the Northwest then; it was a San Francisco based organization that went to work in the Gorge with funds it had raised elsewhere in the country. We initially gave them a \$600,000 program related investment, IRS jargon for a loan. TPL used this money in a revolving fund to acquire from willing sellers valuable pieces of property in the Gorge and subsequently conveyed this land to state or federal ownership. Through



The Trust was the first significant financial supporter of the Oregon Coast Aquarium in Newport.

1990

Fiscal Year End Assets: \$277 million
209 grants for \$15.1 million

Grants ranged from \$1,000 to renovate the building that houses a gleaning program in Sweet Home to \$900,000 to support Oregon Ballet Theatre.

Name changed from Fred Meyer Charitable Trust to Meyer Memorial Trust to make clear the foundation is not connected to Fred Meyer Inc., the commercial enterprise.

this process TPL saved the property from development or degradation and recouped their funds to apply to other purchases. After this project was underway, other funders also gave them support. We later gave TPL another loan and a grant, with the result that the \$1.3 million from us was used to protect more than 25,000 acres valued at over \$38 million. We also gave them a \$500,000 grant to carry out similar work with greenspaces in the Portland metro area. Grants like this have a great multiplier effect, and that is something that foundations like.

A few minutes ago you referred to ‘capacity building’ grants. What do you mean by ‘capacity building’?

This is when the primary intent of our grant is to strengthen an organization in some general way, not support for a specific program of the organization. We’ve been doing more of that, and I think that kind of grantmaking is extremely valuable. A good example is the way we have helped TACS (Technical Assistance for Community Services) in Portland expand its capabilities so that it can serve a larger number of nonprofits in additional ways. An interesting thing about these grants is that the purpose of TACS is to provide technical assistance and in other ways strengthen nonprofit organizations, and many of these are either grantees or applicants to the Trust. TACS is a great organization, and helping it increase its capacity results in a terrific multiplier effect, since its strength transfers to the entire nonprofit sector.

Many of our capacity building grants have been for such things as developing a better marketing and administrative system (Artist Repertory Theatre, for example) or to develop a stronger fundraising program (Community Action Organization in Hillsboro), or expand staff in order to serve more clients (SMART’s statewide expansion; see page 63 for additional information), and so forth. You could also say that the grant to the Campaign for Equal Justice built its capacity for obtaining contributions from lawyers.

1,000th grant awarded.

Traditionally, foundations liked to fund demonstration projects that, if successful, would be replicated in other places. Has the Trust done any of this?

Over the last couple of decades, this concept has been hammered by cutbacks in government funding. Unlike in the Great Society, governments more recently have lacked the resources, and perhaps the interest, to pick up good pilot projects and fund them on a much larger scale. But some of that still occurs, and we have had a number of these experiences. For example, under our Aging and Independence program, we funded Mt. Hood Community Health Center to create the Elderlink program, which trained various kinds of volunteers (mail carriers, meter readers, etc.) to look for signs that elderly people were having serious problems and to report these observations to the Center, which would work on solutions. Based on the success of this pilot, Multnomah County greatly expanded the program. We funded the start-up of two or three projects at the Morrison Center for Youth and Family Services in Portland that subsequently were replicated in other sites. One was the proctor model home for severely abused children. The evaluation data was very positive, and the state adopted this model in several other cities. Another was the Parents as Partners, which was a school-based program that taught problem solving skills to parents and their children. As I recall, its replication in several schools was supported more by private dollars than funds from the school system.

As in the latter case, replications of good programs have frequently occurred in recent years with private support. A good example would be Dougy Center, which helps children and their parents deal with grief over the death of a family member. (See page 73 for additional information.) When the Center was still a very small operation, we gave them a \$150,000 grant to expand their capabilities. Then, through some fortunate national

Fiscal Year End Assets: \$279 million
186 grants for \$10.5 million

1991

Grants ranged from \$500 for a guest soloist to perform with the Linfield Chamber Ensemble to \$1,500,000 to renovate St. Mary’s Academy for Girls in Portland.

publicity, the Center became widely known and much interest developed in this concept. We made a later grant for \$100,000 to develop and publish guidebooks on how to run such programs. These programs are now operating in numerous places in the U.S. and in some foreign countries.

Most of the grants you have mentioned are fairly large. Does a project have to be sizable to be significant?

No, not at all. I think everyone at the Trust has gotten a great deal of satisfaction from some of our smaller grants. One of my favorite grantees is the Sherman County Historical Society. In 1993 and again in 1996 we gave them a grant of less than \$8,000 for upgrades of their museum in Moro. This organization was run by volunteers, but they had achieved a remarkable level of quality in creating this little museum. We were so impressed that in 1999 we made a grant of \$30,000 to build an exhibit hall for their historic farm machinery. And then in 2001 we made a grant of \$50,000 for their dry-land farming and soil conservation exhibit. Well, the museum is no longer so little, and it is terrific. It is such a great example of what a community can do when you combine strong leadership, widespread involvement, and determination to do things in a high quality fashion. They have won national recognition of their accomplishments, and a visit to the museum is well worth the trip to Moro. It is just hard to believe you'll find such an institution in a small rural town.

Another favorite of mine is the science and technology museum in Weston. Yes, in Weston! This is the story of a very creative and hardworking science teacher in the middle school there, Dan Rasmussen. He believed the best way to teach science to his students was to have them build and explain exhibits that demonstrated various science and math concepts. In addition, these exhibits would be placed in a public museum that the students would operate. (See page 107 for additional information.) With

the help of three Trust grants of \$6,000 to \$7,000 under our Support for Teacher Initiatives program, Dan's students, with the guidance of a skilled shop teacher, have created a wonderful museum, just crammed with imaginative exhibits, in part of the city hall. As you can imagine, many students who otherwise had little interest in science got really turned on with this approach. To me, this kind of project is as thrilling as any of our grants. It is just inspirational to see what can happen, even in a very small town, when talented people use their creativity.

There are numerous instances that show how valuable a small amount of money can be. We've seen a lot of community spirit around Oregon, and sometimes these community efforts need only a little boost from the outside to make them real successes. A good example is the small grant of \$8,300 to Friends of the Scout Cabin that helped put the finishing touches on a historic building the citizens of Vernonia had resurrected from the flood that devastated that community in the northern Oregon Coast Range in February 1996. (See page 97 for additional information.) Increasingly, we have looked favorably on projects that involve a lot of community members and strengthen the bonds among them. Our grant may be used for a specific project, but there is a broader and lasting benefit from such projects.

It seems the Trust has not made many grants related to public policy issues.

That is largely true. The trustees did not want to be very active in this arena. Some of the earlier grants, especially in the Aging and Independence program, were intended to have policy implications. Our best example, however, and this is another of my favorites, was the cluster of awards we made that helped create the Oregon Health Plan. After John Kitzhaber, then president of the state senate, hatched the concept of this new approach for Medicaid, he talked to us, and we made a \$79,000 grant to the

1992

Fiscal Year End Assets: \$285 million
221 grants for \$17.8 million

Grants total passed \$100 million mark.

1,500th grant awarded.

Grants ranged from \$1,500 for typewriters for the American Red Cross office in Astoria to \$1,250,000 to support the High Desert Museum in Bend.



Several Trust grants, including one to collect citizen input at community meetings around the state, paved the way for the Oregon Health Plan.

Medical Research Foundation of Oregon to do a trial run at ranking health services according to their effectiveness and calculating the costs of applying a smaller number of services to a larger number of clients. The results of these studies were subsequently used in passing the legislation that created the new Plan. The next year we made a \$129,000 grant to Oregon Health Sciences University to support the collection and dissemination of data and information needed to acquire the federal waiver necessary to put the Plan into action. The same year we made a \$19,000 grant to Oregon Health Decisions to hold 50 community meetings around the state to collect citizen input into how health services should be prioritized under the Plan.

I think it would have been fun to do more of this type of

grantmaking, but to get involved in this kind of activity requires that a board really feels comfortable with it and has a strong agreement on the goals it wants the foundation to pursue.

In a state like Oregon that has a relatively small percentage of minorities, how well do you think the Trust has responded to their needs and interests?

While much more is certainly needed, the Trust has provided a substantial number of grants to organizations that primarily serve one or more minority groups. We have made almost 350 grants totaling about \$34 million to organizations serving Latinos, African Americans, Native Americans, and Asian Americans. This does not include numerous grants that serve minorities as well as the majority population. While we have given a lot of support to minority groups in Portland, our most widespread support has been to organizations around the state that serve Latinos. Several of these—such as Virginia Garcia Health Clinic, *Nuestra Comunidad Sana*, and *La Clinica del Valle*—provide health care to underserved groups like migrant farmworkers. (See page 67 for additional information.) We’ve also supported several projects, both in Portland and elsewhere, that provide affordable housing to low income minority families. And many of our grants supported educational and other services for minority children and youth. I think the trustees will continue to be strongly interested in programs that serve minority populations.

What do you think the Meyer Trust has struggled with the most over 20 years?

For a while the major struggle was over what kind of foundation the Trust was to be. I’ve mentioned that we experimented with focused programs for several years and then moved away from that approach. Perhaps that question is re-emerging with the changes on the board.

Fiscal Year End Assets: \$296 million
197 grants for \$16.7 million

1993

Grants ranged from \$600 for a children’s theater program in Beaverton to \$1,100,000 to expand and renovate the library at Lewis and Clark College.

I'm not sure I would call them struggles, but there have been some other tensions between different points of view, and I am not suggesting that such tensions are necessarily bad things. For instance, there have been differences in the interests of individual trustees. One might be strongly interested in a particular field or project, while one or more of the others didn't share the same level of interest. A continuous concern of some trustees has been that the staff not assume too much power, that the board must always guard against any usurpation of its responsibilities.

One might make the argument that there was a period when the Trust became a bit too satisfied with what we were doing and that more struggle would have been healthy.

When do you feel the Trust hit its stride, if you feel it has?

I don't know how to answer that. I thought we were moving along well in the Aging and Independence program after a few years, but that program didn't continue. With the general purpose orientation of the last several years, I feel we have become fairly adept at that type of grantmaking.

However, I hope the Trust never feels it has totally hit its stride. Since there is so little outside pressure on foundations, I strongly believe you always need to feel some concern about how you're doing. You need to keep critiquing yourself, because you'll seldom hear any of that from the outside.

What do you think the perception of the Trust is among nonprofit organizations in the area it serves?

One of the things I am most proud of is that we're seen, I think, as being relatively open and friendly and respectful. Those organizations that know us best don't see us, at least I certainly hope not, as some citadel up on a hill that is hard to get to. Of course, there are some real limits on how much time we can be available, but the staff has tried to be as helpful as possible, and I think that

is recognized and appreciated. Treating grantseekers with respect, and recognizing that without them we could do very little, was an important value to me, and I have had the good fortune of being able to select staff members who shared that viewpoint.

Another perception is that the outcome of grant requests is unpredictable. That is not unexpected, given the approach we have practiced. It is hard for grantseekers to understand the declination of a request that seems very similar to one that was approved a few months earlier. Frequently there can be substantial differences between two proposals that superficially sound very much alike. These differences might relate to such things as the capability of the applicants, the quality of their planning, the support of their community or clientele, and so forth. And there have been some instances when the trustees have decided not to fund any more of a certain kind of project, even if the later applicants were just as qualified as ones who earlier had received support.

Many nonprofits have probably detected that over the years certain attitudes have emerged within the Trust. For example, we are now quite concerned if a project comes to us without indications that the community or the natural constituency for that project has shown support. But we have tried to differentiate those situations from those where there is no support because the idea is too new or novel. In the latter instances, we may try to help the project become established and build support.

What do you think the perception of the Meyer Trust is among the public?

That really has changed. I've really noticed that. During the first few years, I was frequently surprised by how little known we were. Even though we were making a lot of grants, and we used to get a lot of press, often I would run into situations where people didn't know what the Meyer Trust was. But in recent years, many more people are aware of the Trust. It's much more widely known and,

1994

Fiscal Year End Assets: \$304 million
171 grants for \$10.3 million

Grants ranged from \$466 for a hands-on science program at Hockinson Intermediate School in Battle Ground, WA, to \$1,000,000 to Ecotrust for loans to help sustainable small businesses.

Support for Teacher Initiatives Program began in order to encourage projects designed to stimulate more effective learning.

I think, appreciated. But I suppose that's to be expected after 20 years and more than 3,800 grants.

What about the perception of the Trust among Oregon's movers and shakers?

I don't fully know, but based on some of the comments I've heard, I think there's a real appreciation for a lot of the things we've done and how widespread our contribution has been. I think there's also a perception among some that we can't be counted on as a partner because we don't like to collaborate. So, for example, a state agency wouldn't think that they could come in and go through a period of discussion with us and together we might work on something. They may see us as an important player at a certain point in the process, but not as the initiators or creators or as leaders in that sense. They might feel that we help bring things about, but our involvement is at a later phase in the process.

How do other foundations in the area see the Meyer Trust?

You know, I'm not really sure about that. I think some of them—I've gotten a little bit of feedback on this—also see us as not willing to collaborate or partner. We end up, in fact, jointly funding an awful lot of things with other foundations, but for the most part, that's not a pre-conceived, pre-arranged deal. We each look at a project individually, and we may communicate with one another, but each foundation makes a totally separate decision, not a collaborative or joint decision. I think some of our colleagues think we do a good job of investigating. Some probably see us as too conservative, some see us as bold and daring. I don't know. But we have a lot of good personal relationships with other funders.

How is the Meyer Trust seen on the national level?

I think, at this point, we're probably not seen very much. During our first decade or so, I think we were more visible. Of course there were fewer foundations then; the field has gotten much more populated. There were not that many new sizable foundations coming on the scene when we came in, and we ranked fairly high in the 100 largest foundations back then.

When I came to the Trust, I knew a lot of people on the national scene, so they knew about the Trust, and maybe followed it because of that. And we had a lot of communication with other foundations related to the fields of aging and children. We participated in affinity groups like Grantmakers for Children, Grantmakers for Aging, and that kind of stuff. I was on the Foundation Center board and on several task forces and committees of the Council for a time. Staff attended a lot more conferences and meetings. But in the last several years, I've not been active on the national scene, and since we had terminated all our special programs, there wasn't any basis for us to be active in those affinity groups.

Is the Meyer Trust a major player on the Oregon scene in your view?

Yes and no. I'll start with the negative. The Trust hasn't been a major player in terms of helping to develop policy and direction. We are not much involved in the discussions about what should be future goals or the planning of responses to emerging problems and things like that. On the other hand, we are a big force in funding nonprofit organizations and helping to make things happen. We've provided major support to a lot of programs all around the state, sometimes a major portion of their support. So we have played a big role, but it has usually been in a responsive or reactive manner.

Pauline Lawrence resigned;
Debbie Craig selected.



2,000th grant awarded.

Grants total passed \$150 million mark.

Fiscal Year End Assets: \$306 million
287 grants for \$14.3 million

1995

Grants ranged from \$250 to establish a store operated by students at Huntington Elementary School to \$1,000,000 to build a campus student center at Reed College.



A Trust grant funded a program in which volunteers like mail carriers watch over elderly residents; the pilot project was so successful it was adopted by Multnomah County.

Do you think that the Trust should be involved more as a leader?

That would certainly be a legitimate role for a foundation, and personally I would like to see more of that. But that is a decision the board has to make. It is not something the staff can do without the approval and support of the board. This approach is only

one of many useful roles a foundation can fill, and it should not be entered into unless it is something the board really wants to do and is committed to for a substantial period of time.

If a foundation does want to play more of a leadership role, there are a number of conditions that have to be met. The board has to adopt some very clear ideas about what it wants to achieve and what it will do to pursue these goals. Under those circumstances the board can enable the staff to discuss issues and develop responses with outside groups, because the staff knows what the foundation's long-term interests are, and they can negotiate in good faith on those issues that the board has endorsed.

What do you think are the biggest misconceptions about the Meyer Trust?

A perception, which I think is erroneous and only held by a relatively small proportion of people, is that you can't get a grant unless you really cozy up to a trustee. It is certainly true that a lot of grants have been made to organizations where there is a relationship between some of our trustees and some of the people related to that organization, but it's also true that most of our grants have gone to organizations where the trustees knew no one. And it's also true—and this is what's really not known—that a number of times heavy lobbying was actually counterproductive.

Is there a particular stamp that being in Oregon puts on a foundation?

I would like to say that it shouldn't matter, it should be the same anywhere, but, yes, I think there is an influence. I think there is a kind of informality in Oregon that certainly calls for a more relaxed, non-hierarchical kind of style. And I think being in Oregon also calls for an openness about different parts of the state, its different cultures. If you have a Portland or valley mentality, that wouldn't go over so well in eastern Oregon.

1996

Fiscal Year End Assets: \$352 million
333 grants for \$15.4 million

Grants ranged from \$500 for a craft business project at Farmington View Elementary in Hillsboro to \$1,411,500 for digital transmitters for Oregon Public Broadcasting.

What trends or developments have you seen take place in the foundation world during your career?

There are several things. One, it's a much bigger field. When I first started going to Council conferences back in the early '70s, there might be 350 people in attendance. Now they may have 2,000 or more. Also, there is much greater diversity in the gender and ethnic background of the people who participate in these meetings. There are a lot more women and minorities now. In the early days, you had a lot more gray-haired white men than now.

There's a lot more professionalism, in a sense. There are more formal ways of doing business, more people with more education and specialized experiences. The whole development of affinity groups has happened in the last couple of decades. There is more interest, I think, in international grantmaking. There's a lot more written about the field, a lot more annual reports published. It's a much more open field, in a way, than it used to be.

I could say there is more arrogance now, but I'm not sure that's true. Maybe it's just more people to be arrogant. I mean, I've never seen such arrogance as when I was on the grantseeking side with the Voter Education Project. Some of those guys from large national foundations were very nice to us, but the arrogance and presumed wisdom was really quite amazing.

In recent years we have heard a great deal about a new kind of philanthropy that aims to make nonprofits more accountable, what is often called venture philanthropy, in which business practices are applied to funding nonprofits. Given your long-term involvement in philanthropy, how do you view that approach?

I think there has been far more fantasy than fact in much of the discussion in recent years about a new kind of philanthropy, whether it's called venture philanthropy or something else. To some extent, philanthropy got infected by the same fever that gave us the dot.com phenomenon. Much of the talk about a new and

radically different form of grantmaking revealed both an ignorance of the history of foundations and a naivete about the nonprofit arena. I don't think you'll find anything in recent years that is more venturesome than the work that some of the traditional foundations—Rockefeller, for example—were doing decades ago. And many of the qualities that were being touted were little more than what any good grantmaker would practice, although perhaps using different terminology. But there seemed to be a compulsion in some quarters to disparage what was in place and embrace a new world.

However, some important new models did emerge. I think the most significant is represented by Social Venture Partners, initially in the Seattle area and now spreading to other cities. The phenomenon of concerned people coming together, pooling their funds, jointly learning about issues and responses, and then giving not only funds but their personal involvement is a valuable and very interesting development. The idea of deep personal participation in the activities of recipients is different from what most foundations do. It'll be interesting to see how this works out over time. There appears to be much positive potential in it, but also the possibility of some real problems. But I think this is a very good experiment. Both donors and recipients need to keep learning better ways to do things. And even the misguided criticism I spoke of earlier is probably helpful, because it pushed foundations to examine their actions more than they might have otherwise.

What are you most proud of?

Well, as I mentioned before, I'm proud of the way the Trust treats people. And I'm proud of a number of other things. I feel we have largely succeeded in setting a high standard of professional behavior. It pleases me that we are recognized for doing a good job in our due diligence on grant requests and working with organizations in a thoughtful and helpful way. I am especially

Travis Cross resigned;
John Emrick selected.



Lyle Nelson died.

2,500th grant awarded.

Fiscal Year End Assets: \$384 million
222 grants for \$11.2 million

1997

Grants ranged from \$830 for a business simulation project at Talmadge Middle School in Independence to \$2,000,000 to continue renovations at the Portland Art Museum.

proud of the quality of our staff and the jobs they have done. And, of course, I feel great satisfaction in a large number of the projects we've funded. Recently I took a trip to the Pendleton area and visited 10 or 12 wonderful projects that we had supported in a significant way. It really was heartwarming. And you find that in many areas of the state today. So, even in our unfocused way, we have had a big impact on a lot of good things in Oregon.

And I'm proud of the relationships I've developed with the trustees and with the dedication to the Trust they have exhibited.

How has your relationship with staff changed over time?

Early on, I felt I had to be more of an instructor in certain respects, helping new people learn more about the foundation field and setting up our procedures. I was much more involved then in some of the nitty gritty operations than later on. With very few exceptions, we've been fortunate to have staff members who not only were bright, talented and energetic, but were totally trustworthy and genuinely interested in working together as a team. With people like that, I learned to delegate better and give them more and more independence. My 'managerial' relationship with the staff became more and more subtle. There are lots of interchanges between me and staff members, but they are largely informal, and we have a very open and fluid communication system. I think they all know that I am willing to consider any idea they have, and we have discouraged any sense of hierarchy or attitude that one person's job is more important than anyone else's. It's been a great blessing to be surrounded by people who thrive in an environment that also best fits my own personal inclinations.

Partly because of very low turnover, we have a very experienced staff who really know their jobs and don't require much supervision or guidance at this point. In the Trust's 20-year history, we have only had 27 full-time employees, and 12 of them are still here!

What are your thoughts on what makes a good foundation staff person? Are there particular qualities that a foundation staff person needs?

Of course, it varies somewhat between different positions on the staff, and also on the type of foundation. In a highly focused foundation, you would want program officers who had some specialization in the areas of the foundation's interest. In a foundation like ours, you need people who can act as generalists because they have to deal with such a wide variety of subjects. I always tried to find people who had a good background and accomplishments in some field, but who had flexibility and openness and could be quick studies of whatever came along. And they needed good judgment, not only in assessing the merits of a project, but in knowing when to call their inquiry to a halt and move on to the next assignment. And there are many other qualities: intellectual curiosity, tolerance of ambiguity, good writing skills, the ability to maintain objectivity, and so forth.

Throughout the organization I wanted people who would be cordial and respectful toward those we deal with. This of course is a fine trait in any situation, but there is a special need for it in the foundation world. Inherently there is a difficult, even if it is never acknowledged, relationship between someone who is seeking money and someone who is perceived as having an influence on whether the money will be granted. A foundation officer needs to be very careful not to abuse that situation. It would be very easy to manipulate and hurt people when they feel in a supplicant role. There are two really good things to keep in mind: one, it isn't your money, and two, the foundation couldn't accomplish anything without a partnership with those out there in the trenches doing the real work.

1998

Fiscal Year End Assets: \$384 million
222 grants for \$23.2 million

Grants total passed \$200 million mark.

Grants ranged from \$405 to help special education students at Jefferson High School in Portland learn organizational skills to \$2,000,000 to support the Portland Opera.

What about the trustee relationships with the staff? How would you characterize that through time?

It was very clear from the beginning that this group of trustees was going to be more involved in things than was true in many of the more traditional foundations elsewhere. I think this is true of many of the new foundations, especially in the West. They are not as influenced by what some consider the paragons of the Northeast, except in some negative ways. That is, there is great concern about avoiding the horror stories they've heard of how the staffs of some of those foundations have gained the upper hand over the boards. I knew about these attitudes coming in, so the question was how to work with this in a way that would lead to the most productive result possible.

The trustees have certainly been vigilant in protecting their role from too much staff intrusion, but they have also shown a great deal of respect toward the staff and the role staff plays. I'm sure many executives would question the way we have handled some of the board-staff issues, but I felt it was more important to make the most of this important institution than to preserve some of the conventional notions of how the relationship should work. I should add that on a personal basis there has been a very close relationship between board and staff members.

Even among the Meyer trustees, there are somewhat differing views on the roles of board and staff, and the relationship has evolved over the years. I suspect this evolution will continue in the future.

What would you say makes a good foundation trustee?

Interesting question. I'd start with commitment, integrity, openness to new ideas, intellectual discipline, concern about the community, and a willingness to work hard at the job. I'd then mix in a recognition that the money is not the trustees', but is dedicated

to the public interest. Finally I'd insert an ability to work effectively with the other board members.

The last statement isn't as simplistic as it may sound. It can be a real challenge to promote one's own strong interests, listen to those of others, and find a common platform that allows the foundation to pursue excellence, rather than watered down compromises. There has to be give and take, but within what parameters?

What do you think makes a good foundation executive?

I'm not sure I'm in a position to answer that. Instead, let me just comment on a few things I thought were important in my role here. I always felt that my first responsibility was working with the board, helping them learn about the field, suggesting good policies and procedures, bringing them good information, facilitating good relations among themselves, and trying to promote a smooth and productive process. Secondly, my goal was to select excellent staff members and do whatever I could to help them do the best job possible. After that I wanted to promote a good relationship between the Trust and the public, especially the non-profit world. And then I also wanted to play some role in the larger foundation community, so I participated in a number of activities related to the Council on Foundations, the Foundation Center, and the regional associations in the Northwest.

Over the years I have cut back on the last two functions, except the roles in the regional associations. I felt it was better for the program officers to have most of the direct dealings with applicants and grantees, and I was never much inclined toward the banquet and reception circuit. I guess I grew somewhat tired of the national activities. I hope that withdrawal into the local scene is not a widespread characteristic of Oregon culture; I think one has to make a special effort to stay connected outside the region, and my motivations for doing that waned over time.

O.B. Robertson died;
Orcilia Zúñiga Forbes selected.



3,000th grant awarded.

Fiscal Year End Assets: \$349 million
302 grants for \$25.9 million

1999

Grants ranged from \$726 for supplies that elementary students in Florence use to make Japanese puppets to \$1,200,000 to support the Columbia River Maritime Museum in Astoria.

How would you describe the distribution of power at the Meyer Trust?

It's a very complex thing with a lot of subtleties. Clearly the trustees have the most power and have final control over everything. The final decision on investment matters and all grant requests is fully in their hands. At the same time, the staff has considerable input into their decision-making. The trustees have a great respect for the skill and integrity of the staff, and feel they can rely on information provided by staff members without any fear that it is slanted or distorted by the personal interests of the staff. In a foundation as big as ours, the board couldn't function very well without such input, so you could say that the board is dependent upon the staff in that way.

As I said earlier, the Trust started with a determination that staff not usurp the board's power. Defining how that is applied in operational terms was not always clear and easy. But perhaps there should always be some 'creative tension' in the board-staff relationship. It's certainly kept all of us on our toes.

Do you think the public understands what foundations do and what the limitations of foundations are?

Not very well. I keep being surprised when polls show what a small proportion of the public really understands foundations. Being in the field, I guess I assume that more people would be informed. One problem is that the word 'foundation' is used for so many different things, and many of them are not at all like grantmaking foundations. Over the past 25-30 years the foundation field has made an effort to educate the public, to get more information disseminated about foundations and their benefit to the society. Usually when people have correct information, they feel that foundations are good things. There's been some progress in educating the public, but there's a long way to go.

We encountered a lot of misconceptions and unrealistic expectations when the Meyer Trust started in '82, but the grant-seeking public in Oregon today has a much better understanding of how we and other foundations work. Not that there's no confusion now, but not nearly as much.

Do you think part of the reason foundations remain something of an enigma to the public is that they operate behind closed doors relative to public bodies?

Well, I suppose that certainly contributes to it. I haven't heard much criticism of this in Oregon, but at the national level some people question the propriety of foundations having so much independence. These critics feel that, since the government granted tax benefits for the donation of the funds, foundations should have a much greater degree of accountability to the public. They condemn the ability of a small group of board members to decide in private how these funds are to be used. Of course, the IRS requires foundations to report rather extensively on how they spend the money, but some critics want more public control.

Foundations really are peculiar institutions. On the one hand, their funds really do belong to the public in a sense. That is, the money is dedicated to the public interest. But the decisions on how the public interest is to be defined is left to a small group that works in private. Within the legal boundaries, a foundation board has tremendous latitude in deciding where the money will go. While I can understand some frustration about this arrangement, I think it would be a big mistake to change it.

Really? Why?

Because I don't think there's a better alternative. Once you start down the path of greater public involvement, democratizing the decision-making, where can you reasonably stop, short of some kind of legislative body? Obviously, everyone can't participate

2000

Fiscal Year End Assets: \$537 million
232 grants for \$23.6 million

Grants total passed \$250 million mark.

Grants ranged from \$667 for a family literacy program at Farmington View Elementary in Hillsboro to \$1,500,000 to help build a new distribution center for the Oregon Food Bank.



The Sherman County Historical Society used several Trust grants to create a museum documenting the history of dry-land farming in the small eastern Oregon community of Moro.

directly in the decisions, so you would have to have some kind of representative machinery, and we already have that in the form of Congress and state legislatures. And I really question the wisdom of diverting the relatively tiny foundation sums into our huge public coffers. Look, if in 1982 the \$120 million that created the Meyer Trust had gone to Washington, D.C., it wouldn't even have been noticed there, and probably no trace of it could have been found in Oregon. Instead, the Meyer Trust in 20 years has translated that donation into almost \$300 million in grants primarily to Oregon institutions, with a remaining corpus of almost \$500 million that will continue benefiting Oregonians far into the future.

Private foundations aren't democratic, but neither are many American institutions. Look at the Supreme Court, the Senate, corporations.

I think the pluralistic nature of the foundation field, the dispersion of decision-making among thousands of independent boards, is a good thing. Each of us might at times criticize the way a particular foundation is spending its funds, but I haven't heard of any arrangement that I think would be better. I'm glad that foundation boards reflect different viewpoints, different values, and support different things. In the long run, I think the country benefits from this multiplicity, because we are spreading our bets. Frequently, even in the foundation field, there may be widespread agreement about what is most pressing, how resources should be used, what actions would be most valuable. But here and there some foundation boards are doing something quite different, and as time passes these outlying views can prove to be very valuable.

Are foundations performing to their greatest potential? Of course not. I have plenty of criticisms myself. But the answer to improvement, I think, is that every foundation should constantly be questioning what it is doing, asking hard questions about how it could be most effective, not taking the easy or popular path. When foundations do that, I'm very comfortable with letting all these different groups choose their various ways of serving the public interest.

Foundations are sometimes criticized as elitist institutions that primarily reflect the values of white mainstream culture. What do you think of this criticism of foundations, in general, and how does this apply to the Meyer Trust?

Whether you consider it bad or good, some foundations do reflect these values and virtually all their support goes to what might be called elitist institutions. The Meyer Trust gives a lot of support to organizations that some would call elitist—say the opera or the symphony. But if you go to one of their performances, you see a lot of people who certainly wouldn't consider themselves

3,500th grant awarded.

Fiscal Year End Assets: \$496 million
292 grants for \$23.6 million

2001

Grants ranged from \$600 for a conductor's podium for the Portland Symphonic Girlchoir to \$1,350,000 to support the Portland Center Stage theater company.

as part of the elite. Most foundation boards have white mainstream backgrounds, and a foundation essentially reflects the values and interests of its board. But this doesn't necessarily translate into the foundation being primarily a supporter of elitist institutions.

Foundation boards and staff exhibit a lot more diversity than they did 20 years ago, and this is good. But, while it is very useful to bring in people with different backgrounds and experiences, I don't think that will ever be sufficient. There can never be full representation in a foundation of the diversity of our society, so it seems to me that it's critical that whoever is in the foundation must make really strong efforts to reach out into the community and open themselves up to different viewpoints and activities. The Meyer Trust hasn't been perfect in this respect, but I feel that we have done a good job at it. I've always been proud that the trustees, from the very beginning, were open to things they didn't previously know about, people they didn't know, and activities that were unfamiliar to them. We need to try even harder in this realm, but our grants list is far from being limited to elitist institutions.

Are there any particular threats or challenges facing foundations at this point?

There aren't any imminent dangers at the moment. But there is a constant underlying threat that, if foundations aren't known and understood by the public, a few scandals in the field or a demagogue could make them vulnerable to legislation that could be very damaging. So, we not only have to be a benefit to society, we have to make some effort to communicate that message to more people. There are plenty of laws and regulations already, if there should be any misbehavior on the part of a few foundations. These legal sanctions should be vigorously applied if anyone in the field does step out of line.

However, I don't think foundations should shy away from controversial issues out of fear of public or legislative reprisals.

I'm not saying there wouldn't be criticism when a foundation supports a study or an activity that aligns with a conservative or liberal position that is controversial. But I don't believe this is likely to lead to real damage to the field, not as long as it isn't linked to some kind of scandal. I have to say again that part of our problem is so many different kinds of organizations call themselves foundations, and it is always a challenge to distinguish ourselves from some of these organizations that do some pretty drastic things.

Do you have any regrets?

At this point, my largest regret is that I didn't get out into the field more in recent years and visit with more of the organizations seeking and receiving grants from the Trust. In the earlier years I did a fair amount of proposal investigation, but as time went by I left that to the program officers. But my job offered me the wonderful opportunity to get around the state and meet a lot of interesting people who were doing great things, and I regret that I didn't do more of that. I had many good experiences, but I could have had even more.

Another regret that I sometimes felt was not taking on one more new chapter in my career. My long tenure here is two-sided; there are many good things about it, but the downside is that I didn't have the stimulating experience of a whole new challenge. At this point I feel happy that I stayed with the Trust, but there were times when I felt that it might have been better for me personally to take on something new. However, I feel really good about retiring now and feel things are in good shape for a successful transition.

And I very much regret that Lyle Nelson, Pauline Lawrence, and O.B. Robertson are not here to help us celebrate our 20th anniversary. ■

2002

Fiscal Year End Assets: \$475.2 million
323 grants for \$24.7 million

Charles Rooks retired;
Doug Stamm selected.

