



Investing in Capacity Building: Lessons from the Cedarmere Foundation

2006-2024

Strengthening nonprofits to help communities thrive

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Our Legacy Vision

Our legacy vision is strong, thriving nonprofit leadership equipped to navigate an uncertain future with the support of a funding community committed to investing in capacity building.

Our Legacy Values

Learning

We embrace and support active, continuous learning and share what we learn with our community and philanthropic partners with the goal of inspiring others to invest in capacity building.

Equity

We commit to investing in Black, Indigenous, People of Color (BIPOC), and women leaders and prioritize investments in organizations that support BIPOC communities and the reduction of racial and gender-based disparities.

Community

We value trusted relationships. We center our community partners in everything that we do and work with them to support the capacity building needs they prioritize.

Letter from Kathy and George Edwards

As the founders of the Cedarmere Foundation, it was with mixed emotions that we decided to sunset the Foundation in 2024. That decision also ended one of the most important and meaningful chapters of our own lives. For 18 years, we were deeply involved in supporting small nonprofit organizations in the Puget Sound region with capacity building grants. By providing them with resources to build needed systems, structures and skills and investing in their leadership, our grants gave our community partners an important tool to increase their effectiveness and work toward sustainability. This experience was, without a doubt, the most inspiring work we have ever done.



Over our many years of grantmaking, it has become clear to us that there is no more effective way for small grants to have a significant impact than by supporting an organization's capacity building needs. As we developed relationships with nonprofit leaders over the years, we gained many valuable insights into what it takes for nonprofits to survive and thrive. Much of the nonprofit sector is fragile and stability is often dependent on effective leadership. When that is absent or changes too frequently, nonprofits often struggle to survive and successfully deliver on their mission. However, relatively small amounts of money used by effective leaders to strengthen an organization's people and infrastructure can be transformative, in spite of the fact that funds for this type of work are very hard for nonprofits to find. We are eager to see that reality change!

We sincerely hope that the lessons learned that we've shared in this legacy document will inspire other funders to add dollars designated for capacity building to their general operating grants. We also hope that what we've learned during our journey will encourage nonprofit leaders to request funding for capacity building and make that work a priority within their own organizations. We are most grateful for the relationships we have built with the many nonprofit leaders we have supported since 2007. They are truly our heroes, and the amazing work they do to make our community better for all of us is an ongoing source of inspiration.


Kathy Edwards

Kathy Edwards, *Founder*

George Edwards

George Edwards, *Founder*

"...relatively small amounts of money used by effective leaders to strengthen an organization's people and infrastructure can be transformative."



Cedarmere is a name that evokes memories and connection to family history. With the founding of the Cedarmere Foundation, the name gained a newfound significance as the catalyst for moving forward a vision of a strong, thriving nonprofit sector supported by a funding community committed to investing in capacity building. Kathy and George Edwards, the founders of the Cedarmere Foundation, brought their personal and professional backgrounds and experiences together to create a family foundation that merged their desires to strengthen the nonprofit community and engage with their family through philanthropy.

Cedarmere's History and Evolution Over Time

Founder History

The house on Mercer Island, Washington, where Kathy grew up, is the Cedarmere Foundation's namesake. It is also where two successive generations of family members enjoyed time with their grandparents and great-grandparents. Kathy's mother moved to Seattle from a small town in Idaho, where her parents owned and managed a meat packing plant. Both Kathy's grandparents and her parents engaged in informal philanthropy, passing down values around giving back to the community, which Kathy has carried with her throughout her life.

George, a native Texan, grew up in a very different environment than Kathy but shared similar values around the importance of community, family, and service. After serving four years of active duty in the US Air Force, George returned to his hometown of Dallas, where he taught high school debate and US history for 15 years and served an additional 23 years in the Texas Air National Guard. Eventually, he transitioned to a career in school administration, serving as Head of School for five independent schools in Texas, Alabama, and Washington.

Kathy and George met in Spokane in 1985 through their involvement at Saint George's School, where George was Head of School for six years, and Kathy served on the school's Board of Trustees. When George moved to Spokane to lead Saint George's School, all three of Kathy's children, Bob Watt, Christie Biesold, and Wendy Watt, were students at the school. For several years, he was both their teacher and their debate coach, as well as their Headmaster. Little did any of them realize then that they would later become George's stepchildren after he and Kathy married, and later still, as adults, fellow trustees of the Cedarmere Foundation.

Immediately after George and Kathy married in 1991, they moved to Huntsville, Alabama, for George's next position as Head of Randolph School. While there, Kathy completed her dissertation to earn a Ph.D. in Human and Organizational Systems from Fielding Graduate University. After completing her

doctoral program, she expanded her nonprofit consulting practice to include much of the United States and beyond. She worked with clients in Florida, Louisiana, Texas, Washington DC, Boston, Hawaii, Washington State, California, Bermuda, and the Czech Republic.

After six years in Alabama, Kathy and George returned to Seattle as their first grandchild was about to be born. There, they continued their careers, developed new relationships, and served on the boards of various local organizations that ultimately inspired them to create the Cedarmere Foundation.

The Beginning Years of the Cedarmere Foundation

In 2006, Kathy and George founded the Cedarmere Foundation with funds Kathy inherited from her mother and maternal grandmother. Much of the inspiration to start a family foundation came from Kathy's active involvement in the Washington Women's Foundation, which she joined in 1996. She served on its board for nine years and was active on several of its committees for more than two decades. Kathy and George saw that creating a family foundation could be both a vehicle for supporting their community and a way to bring the family together through philanthropy, enabling them to pass down the values of giving back from one generation to the next.

Determining a Vision, Mission, and Structure

During Cedarmere's first year, clarifying a vision, mission, and roles, and identifying structures, policies, and procedures occupied much of the board's time and energy. Frank Merrick, an Oklahoma-based consultant experienced in working with family foundations, facilitated an initial retreat with the founding board, which included Kathy and George, Kathy's children Bob, Christie, and Wendy, and Bob's wife, Christina.

The first priority for the family's initial planning retreat was defining the Foundation's vision and mission. The original endowment was about \$600,000, so family members spent time determining what type of small grants could have the most significant impact. Several family members had served on other boards, so they understood the importance of investing not only in programs but also in the infrastructure and people central to carrying out an organization's mission.

The initial retreat with Frank also resulted in key decisions regarding a membership structure in which all family members, age ten and older, automatically became members of the Foundation and had voting privileges at age 22. The voting members of the Foundation were responsible for electing board members each year at an annual meeting, which also provided an opportunity for the family to come together, learn about the Foundation's work, and get to know some of the organizations the Foundation had supported in the previous year.

From its inception, Cedarmere's vision and mission centered on the importance of building the capacity of nonprofit organizations through support for the people and infrastructure needed to address community challenges. After attending numerous philanthropy conferences during Cedarmere's early years, it became apparent to Kathy and George that very few other foundations dedicated a significant amount of their grant dollars to capacity building. This fact clarified the urgent need— and subsequent board commitment— for dedicated capacity building support to strengthen the sector and the individual

Cedarmere's original vision and mission statements

Vision

The transformative power of the Cedarmere Foundation is its ability to strengthen the connections, in depth, breadth, and intensity, among members of our family and between our families and our communities and the causes we care about.

Mission

The Cedarmere Foundation supports the development and sustainability of effective governance and leadership in small nonprofit organizations that focus on education, health or human services in the Puget Sound region of Washington State.

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The idea of creating a foundation gave the family an explicit way of talking about values. I think we all appreciate the idea of giving back locally and recognized that as something Kathy has been involved in within the nonprofit community for as long as the three of us have been alive.

– Wendy Watt, Cedarmere Trustee

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“ *There were lots of growing pains at the start of the process. It was exciting and also challenging to set up systems and structures, decide who wears what hat, and deal with the dynamics of a family foundation.*

– **Christie Biesold**, *Cedarmere Trustee*

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“ *My experience as a trustee with Cedarmere completely changed my outlook on charitable giving. I was able to witness first-hand the dedication of staff involved in small organizations. My wife and I re-focused our giving toward small organizations that leverage our gifts for an impactful result.*

– **Todd Biesold**, *Cedarmere Trustee*

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nonprofits within it. While all of the Foundation’s grants were restricted to capacity building activities, except those made at the onset of the pandemic, each grant recipient defined its own capacity building needs and, thus, how it used Cedarmere’s grants.

Defining a Grantmaking Process

From the beginning, Cedarmere’s trustees decided to invite organizations to apply for funding rather than have an open application process. Because capacity building needs far exceeded Cedarmere’s available resources, invitation-only applications eliminated the need for organizations to expend time and effort writing proposals that had little chance of being funded.

Trustees also understood that capacity building needed to be an iterative, ongoing process to have a lasting impact. The board established a practice of awarding grants for three consecutive years, requesting a new grant application each year to clarify the upcoming year’s capacity building needs. This allowed grant recipients to undertake new projects and activities each year, building on their previous year’s efforts.

Having done significant training around trust building as a consultant, Kathy understood the necessity of developing genuine relationships, which motivated her to institute the practice of in-person site visits with every potential community partner before making grants to them. These site visits had to become virtual after the onset of the pandemic in 2020, but they remained a central component of Cedarmere’s grantmaking throughout its 18-year history. These meetings with each nonprofit over three or more years allowed the trustees and their community partners to get to know and appreciate each other in important ways. Those relationships, in turn, informed some of the Foundation’s key learnings around the value of trust-based philanthropy and relationship building.

The first grants awarded by Cedarmere in 2007 totaled \$25,150, with grants ranging from \$3,160 to \$5,200. The grant awards remained at this scale through 2013, the year the Foundation’s endowment was significantly increased by the bequest from Kathy’s mother. Beginning in 2014, individual grant awards gradually increased to \$10,000 and later to \$15,000.

Cedarmere’s grants, while not large in size, allowed organizations to implement a variety of capacity building needs that, in many cases, had significant impacts. Through strategic planning, fund development strategy, coaching and training for executive leaders and other staff, board training, evaluation plans, diversity, equity, and inclusion training, and more, community partners were able to leverage Cedarmere’s grants to yield powerful outcomes in strengthening staff, internal systems, and operations. Over its 18-year history, Cedarmere invested in the development of 51 nonprofits in the Puget Sound region through multi-year capacity building grants.

Hiring staff to support Cedarmere’s capacity

During the first ten years, Cedarmere’s trustees helped with all of the Foundation’s work. While Kathy chaired the board from its inception, George and the second-generation family members serving on the board shared all other responsibilities, including its grantmaking program.

As the number of grants and community partners increased, Kathy and George decided it was time to hire a part-time grants manager. One of George’s former staff members at Epiphany School, Bridget Dolan, took on this new responsibility in early 2016, continuing until the end of 2018 when she became the Executive

Director of The Good Times Project. The trustees agreed that they all benefited from having staff support the Foundation's work, and so they hired Danielle Baer in early 2019 to succeed Bridget. Danielle supported the board's governance work and grantmaking activities and later led the communications effort to share the Foundation's learnings and history during the sunseting process. In 2021, Melanie Matthews, who had been serving as a community trustee, transitioned to part-time Executive Director to work with Kathy to guide the Foundation's sunseting process.



Cedarmere Foundation Staff 2016-2024

Pivotal Moments for the Foundation

The Cedarmere Foundation evolved over 18 years in two main ways: the criteria it used to select the organizations and communities it funded and who it involved in its grantmaking decisions. Below are five pivotal decisions in the Foundation's history. They stand out in charting the course for critical decisions that shaped how it approached the final legacy values and vision for spending down the Foundation's endowment in its final years.

The following section of this publication delves deeper into six key lessons learned over the Foundation's history and will explore these pivotal moments further. The Appendices also include a detailed timeline of important milestones that occurred during the Foundation's 18 years of grantmaking.

Peer Exchange Meetings: In 2007, Kathy was inspired by another funder to offer a peer learning space to Cedarmere's first cohort of grant recipients. These quarterly meetings became a permanent part of Cedarmere's support for community partners. Importantly, they also provided an invaluable opportunity for Kathy and George to truly understand the value of investing in leadership and the crucial role leaders play in their organization's success or failure.

Collaboration Maximized Benefits to Both Funders and Grantees: In 2012, after representatives from the Cedarmere Foundation, the Champion Foundation, and Social Venture Partners-Seattle attended an outstanding training session made available through Philanthropy Northwest, all three funders decided to underwrite the cost of providing this same training session to our collective group of grant recipients. Over the next eight years, this partnership continued to provide one to two training opportunities a year for our grantees based on their needs and preferences. This collaboration allowed Cedarmere to provide powerful learning opportunities to its community partners and for the board to better support leaders and their organizations by more fully understanding their challenges.

Community Members Join the Board: A retreat in late 2013 resulted in a major turning point for the Foundation's board structure with the decision to invite non-family members to join. Over Cedarmere's history, five community trustees served on the board, providing invaluable input into the Foundation's grantmaking and sunseting processes. This pivotal decision had such an impact that it comprises one

“ I think it's important to have external members outside the family on the board. If it's all just family members serving, you can end up with one strong personality taking the lead or family disagreements spilling over into board meetings. I really think that's the key to having a successful board and the number one piece of advice I'd give to anyone involved with a family foundation.

– Bob Watt, Cedarmere Trustee

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Cedarmere Foundation's Trustees 2006-2024 (Tanya Kim not pictured)

of the lessons learned explored in the next section. See page 37 to learn more about the skills and experience these leaders brought to their service on Cedarmere's board.

Deepening Focus on Equity in Grantmaking: In 2016, a board retreat focused on better understanding racial and ethnic inequities on a neighborhood-by-neighborhood basis throughout the Seattle area marked a pivotal moment in prioritizing grants to historically underserved neighborhoods and populations. The board's conversations on using equity as a framework for grantmaking deepened over the following years as the trustees – a group of majority white members – engaged in learning to gain a deeper understanding of the effects that systemic and structural racism and other inequities have had on various communities in the region.

Investing in Capacity Builders: As Kathy and George deepened their engagement with the nonprofit sector, the Foundation became more attuned to the critical role played by organizations whose work focuses on building the capacity of other, smaller nonprofits and the challenges these capacity building organizations faced in raising their own funds. As a result, by 2020, the Board had decided to direct all future grants to capacity building organizations. By doing so, the impact of the Foundation's grants was multiplied many times since each capacity building organization's mission focused on strengthening many other smaller nonprofits and the communities they served.

Centering Responsive & Reflective Grantmaking

2020 marked a year that will always be remembered across the globe – a pandemic that brought the world to a standstill, a movement for racial justice sparked by unthinkable violence toward people of color, and growing divisions across the country. Like other sectors and industries, philanthropy faced the challenge of addressing the urgent needs that arose due to these crises. More than ever during this time, nonprofits required resources to respond to the constantly evolving and expanding needs within the communities they served.

The Cedarmere Foundation's immediate response to the pandemic was to award emergency unrestricted grants to 14 community partners totaling \$64,000. These funds addressed immediate needs and contributed toward a movement across philanthropy and government to provide relief to the nonprofits being called on to meet their community's urgent needs in unprecedented ways.

Cedarmere adopted the following updated vision statement in 2014:

Through the Cedarmere Foundation, our family legacy is strong, effective nonprofit organizations that enable communities and families to thrive in the Puget Sound region.

In addition, to address the pandemic's ongoing crisis, the Foundation's regular grantmaking process in 2020 allowed organizations to apply for general operating and/or capacity-building grants. About half of that year's grant recipients requested grants restricted to capacity building, a few requested only general operating support, and others chose to apply for a combination of the two. Their choices confirmed the ongoing need for specific, designated funds to support capacity building activities like training, coaching, and strategic planning, as well as the need for funders to be flexible.

During this time, as part of Cedarmere's evolution in centering relationships and trust with community partners, the Foundation also moved away from a written application process and formal written grant reports. Both tasks, usually quite burdensome and time consuming for nonprofit staff members were replaced by virtual check-in meetings between trustees and the Foundation's community partners.

The Decision to Sunset & Final Investments in Nonprofit Leadership

Cedarmere's bylaws required Kathy and George to retire from the board when they turned 80. By 2019, that date was only five years away, so the board had to begin addressing this issue seriously. After considering possibilities, trustees agreed that sunsetting was the best option because it ensured that the maximum amount of the Foundation's endowment would be invested directly into the community by the end of 2024. Less than six months later, COVID-19 turned the world upside down. Seeing our community partners and the rest of the sector reeling from the increased demand for their services confirmed and reinforced Cedarmere's decision to sunset. It became clear to Cedarmere's trustees that there had never been a time during their lives when there was a more urgent need to provide support for this work.

Defining a legacy vision, values, and strategies

After deciding to sunset, the board's first task was determining what legacy the foundation wanted to leave. They hired Jen Martin, a consultant for many other philanthropic partners, to facilitate a board retreat focused on defining a legacy vision, goals, and values to frame and guide spending down Cedarmere's endowment. Melanie worked with the board to build out these values and develop a decision-making process to guide their final grantmaking.

The board also asked for input from Cedarmere's community partners to understand trends, challenges, and their thoughts about where Cedarmere's final legacy investments could have the greatest impact. In addition, representatives from the Quixote Foundation and the Brainerd Foundation, which had recently completed their own sunsetting processes, and colleagues from philanthropy and other consultants who work closely with nonprofit leaders provided input and guidance.

The final sunsetting grants were distributed to eight community partners in 2024. The specific intention behind each was to address the needs shared by community partners and other community leaders to move forward Cedarmere's legacy strategy of *investing in the development, support, and sustainability of nonprofit leadership*. To the extent that other foundations and funders of all types are inspired to add capacity building support to the other funding they already provide, the nonprofit sector will be stronger and more resilient, and Cedarmere's work will continue having an impact long after the Foundation closes its doors.

“As a small family foundation with limited resources to hire paid staff to replace me as the volunteer leader of the Foundation, and no other family members ready to take over that volunteer leadership role, it became clear to the Board that sunsetting would allow it to return the greatest amount of the Foundation's assets directly to the community. Within a year after the decision to sunset was made, the global pandemic devastated much of the world and revealed how urgent the need for support was throughout the nonprofit sector. Those two factors cemented our decision to “spend now” rather than “save for later.”

— Kathy Edwards, Cedarmere Co-founder and Trustee

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One of the Cedarmere Foundation’s core legacy values was learning. Our goal in preparing this document was to provide summative lessons at the conclusion of our 18-year journey to all who are invested in supporting a vibrant, sustainable nonprofit sector.

Six Lessons from the Cedarmere Foundation’s 18-year Journey

Reflecting on our grantmaking experiences and our conversations and interviews with current and past trustees and several community partners funded by Cedarmere, six key lessons emerged. While each lesson yields important insights, ultimately, Cedarmere’s journey revealed one overriding conclusion:

Capacity building support equips nonprofit leaders with the vital resources they need to invest in the people and infrastructure that bring their mission to life. Investing in capacity building is one of the most important and effective strategies a foundation can use to make organizations more effective, sustainable, and resilient.

“*Funding from the Cedarmere Foundation allowed us to move forward in building our own capacity as capacity builders within Indigenous communities. We were able to hire strategic planning facilitators that moved us along in substantial ways that we did not expect!*

– **Susan Balbas**, Executive Director,
Na’ah Ilahee Fund

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Through this document, we hope to inspire other funders to include investments in capacity building for each of their grant recipients and to make capacity building an integral and ongoing part of their grantmaking program.

Our six lessons learned fall into two categories: Inward-facing and Outward-facing.

Inward-facing lessons center on Cedarmere’s evolution as a family foundation, from one that initially focused primarily on family involvement to one that focused on mission as its top priority.

- 1** Clearly defined core organizational values serve as guiding principles in decision-making and strategy development.
- 2** Community representation (non-family members), especially by nonprofit leaders, on family foundation boards can have a transformational impact.
- 3** Rethinking a foundation’s relationship to risk and failure in grantmaking can lead to learning and opportunity.



From left to right: OneAmerica, RVC, Hamlin Robinson

Outward-facing lessons center on how foundations can maximize their investments with a specific focus on capacity building, reaffirming what those working in the nonprofit sector have shared with funders for years – relationship building and trust in community-led solutions can yield powerful results.

- 4 Relationship building and trust are foundational to cultivating authentic partnerships between foundations and the nonprofits they support.
- 5 An investment in a nonprofit’s capacity, particularly in its leaders, is essential for long-term success and sustainability and ultimately makes all nonprofit work possible.
- 6 Those closest to the challenges being addressed, i.e., the community being served know best how to solve those challenges with appropriate solutions.

While we offer these lessons as six separate ideas, they are all interrelated and build on each other. They are threads that offer insights related to equity, community, power sharing, leadership’s pivotal role, and more.

Woven throughout these lessons are highlights and quotes from trustees and community partners that illustrate further our lessons learned in action. We have also included a more in-depth story of Cedarmere’s partnership with Communities Rise, a Black, Indigenous, and people of color (BIPOC) led and BIPOC-serving capacity building organization funded by Cedarmere for more than a decade. It provides a comprehensive view of several learnings focused on the value of relationship building, effective leadership, and the transformative power of capacity building support in positioning nonprofit organizations to respond effectively to community needs.

“ There were times when I wondered, ‘Will our grant really make that big a difference?’ But when you compound that over three years, and you really get to know the organization and understand its unique challenges, it was extraordinary to see the impact our grants had with direct investments in governance.

– Christina Watt, Cedarmere Trustee

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“*The Foundation retreat in 2016 was a key inflection point during my tenure on the board. The learning forced us to examine whether our giving aligned with the data we saw, which changed the course of the Foundation’s focus and trajectory. Understanding that equity is central to the work meant that equity also became central to our grantmaking. Adopting an equity lens created more opportunities for nonprofit organizations that we had not previously considered. All this learning has deeply influenced my thinking, both personally and professionally. The journey to achieve racial equity is one every organization can take.*

– Amy Zimmerman,
Cedarmere Community Trustee

Inward-facing lessons: Setting up a board to make mission-focused decisions



Lesson 1:

Clearly defined core organizational values serve as guiding principles in decision-making and strategy development.

Organizational values provide purpose and direction. For a foundation, values provide the framework for decisions regarding strategy and grantmaking processes and policies. Values can be a powerful tool to bring trustees together to ensure that their decisions align with their foundation’s priorities and goals.

For the Cedarmere Foundation, a few pivotal decisions in the Foundation’s history provided clarity around how to align its work with its core values. These included shifting its focus from family-centered to mission-centered, elevating equity as a lens through which grant decisions were made, and finally, defining legacy values for our sunseting strategy.

1 Becoming a mission-centered foundation

While the foundation had been formed in part to bring the family together around giving back to the community, several of the family members were at a stage in their lives where raising children and managing careers posed a challenge to committing more fully to the Foundation. Simultaneously, Kathy and George became increasingly committed to the Foundation’s mission-focused strategy of investing in capacity building for nonprofits. Evolving from a family-centered to a mission-centered foundation was important, especially for Kathy and George, in determining how best to use the Foundation’s endowment to maximize the impact of its small grants. A facilitated retreat helped evolve the Foundation’s vision to continue engaging family members who wanted to serve on the board while bringing in community leaders to provide guidance and perspective and help shape decisions to ensure mission fulfillment.

2 Centering equity as a frame for making grant decisions

In 2016, the Cedarmere trustees participated in a retreat to better understand equity. A guest presenter shared data on racial, ethnic, and socioeconomic disparities in neighborhoods across the greater Seattle region. This retreat marked a turning point for the Foundation and a profound shift toward prioritizing racial equity as a critical lens for funding decisions in order to increase their impact on historically underserved communities. The process of navigating pandemic challenges and the aftermath of the 2020 racial reckoning led to a shared understanding among Cedarmere’s trustees around systemic racism and the dramatic disparities in the region. This understanding, in turn, shaped the Foundation’s grantmaking from that point forward and led the board to prioritize funding BIPOC-led and BIPOC-serving organizations in making its final sunseting grants in 2024.

3 Defining legacy values to guide the sunseting strategy

Once the decision to sunset was made, the board initially focused on identifying core values that reflected the Foundation’s commitment to capacity building and that would ensure that its final grants were directed to organizations serving under-resourced communities. Trustees hoped that doing so would enable them

to maximize the impact of their sunseting grants. Equity, Community, and Learning were identified as the Foundation's three primary values for guiding those final grants. They also formed the basis of the board's legacy vision and supporting strategies.

Vision

Strong, thriving nonprofit leadership equipped to navigate an uncertain future with the support of a funding community committed to investing in capacity building.

Strategies

- Invest in the development, support, and sustainability of nonprofit leadership
- Share what we've learned about the power of capacity building grantmaking with our nonprofit partners and philanthropic colleagues.



Lesson 2:

Community representation (non-family members), especially by nonprofit leaders, on family foundation boards can have a transformational impact.

Non-family member community representation, especially by nonprofit leaders, can transform family foundation boards. Community members can offer fresh perspectives, expertise, and a deep understanding of community needs. This leads to more accountable philanthropic efforts, as well as guidance on the effectiveness of grants and other initiatives. Community representatives on the board can also help build stronger connections between a foundation and the communities it serves, fostering trust, partnerships, and a deeper understanding of local needs and assets.

The Cedarmere Foundation benefited in so many ways from the engagement of community leaders on its board. Their participation helped challenge existing assumptions and encourage innovation and change. Family dynamics also diminished with the presence of community board members because family members became more inclined to leave their "family stuff" at home when doing foundation work. As Cedarmere further solidified its mission-focused grantmaking over the years, community trustees provided invaluable perspectives and insights, shared their first-hand knowledge of current trends in the nonprofit sector, and brought the board critical knowledge to help inform its investment decisions.

To ensure full participation by community board members, the board found that it was important to openly acknowledge and address the power differential between family and non-family board members. The non-family perspective can promote openness and transparency – highlighting the importance of not always defaulting to what's comfortable or known but instead being vulnerable and transparent in decision-making. For Cedarmere, having community trustees helped the board become a better, more responsive, and more effective philanthropic partner to the organizations it funded. As leaders close to the communities being supported, their expertise significantly improved the board's discussions and decision-making.

“ While the Foundation benefited from community trustees who helped bridge the gap with many of our nonprofit partners, I also benefited from the experience, which has stayed with me beyond serving on the board. Together, we developed a culture and practice of engagement and decision-making across differences.

– Tanya Kim, Cedarmere Community Trustee

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“ Having diversity in different spaces, like on a foundation board, makes us better, and while it can create discomfort as the trust is established, it can push us to call out our injustices and help to bring to light things others may not see because they haven't lived that story.

–Beto Yarce, Cedarmere Community Trustee

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“*When it comes to social impact, capacity building is foundational and it is about investing in people power. What that looks like are investments to support the capacity of people to deepen and broaden their expertise, develop tools, and acquire new knowledge to imagine and build systems, teams, and programs around the ideas and values which altogether inspire a vision to organize, mobilize, and activate change.*

– **Aurora Martin**, Co-Executive Director,
Front and Centered

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Lesson 3:

Rethinking a foundation’s relationship to risk and failure in grantmaking can lead to learning and opportunity.

The philanthropic sector tends to be risk-averse, even though foundations have few accountability mechanisms beyond protecting their tax-exempt status. As a result, very few decisions a foundation makes are genuinely risky. Why, then, are so few funders willing to support innovative ideas and new approaches to persistent problems even though doing so can yield incredibly effective results? This question deserves serious consideration by every funder.

Many nonprofits have innovative ideas grounded in community input and needs but require donors’ funding to bring them to life. Rather than funding innovation, philanthropy often expects nonprofits alone to carry the risk involved in developing new approaches to social sector work. As long as foundations are only willing to invest in programs or activities with predictable track records, new solutions to intractable problems will likely never be discovered. In contrast, when philanthropy is willing to assume some of the risk involved in creating innovative solutions to community challenges, the potential for learning and impact can be game-changing.

When a board takes the time to define what constitutes risk or failure for a foundation, innovation and learning about potential future opportunities become possible. What may feel risky to one foundation could be seen as a critical investment to another. Using organizational values as guiding principles in a foundation’s grantmaking and measuring what feels risky through a mission-centered lens can help clarify when to invest in a program or project without a proven track record.

Many funders regard capacity building as risky since the impact of capacity building efforts often takes time to become evident and may never provide quantifiable results. Cedarmere’s founders, a retired nonprofit executive and a retired organization development consultant, had both personally experienced the power of capacity building work during their professional careers, so they never doubted its vital role in an

From left to right: Front and Centered, Latino Community Fund of Washington



organization's success. For example, investment in training or coaching for a leader can produce dramatic results that increase an organization's effectiveness and ability to deliver on its mission.

Strengthening organizations through capacity building is one of the most effective ways to help a nonprofit succeed in addressing community challenges. While seeing measurable results may be gratifying to funders in the short term, achieving long-term impact in meeting community needs is more likely accomplished by strengthening the organizations doing the work.

Risk and trust go hand in hand – as foundations focus more on building relationships and trust with community partners, they better understand an organization's priorities and where funding is needed. Funders also benefit from understanding that what feels risky or uncertain to them may, in fact, be a well-thought-out community solution in need of funding support. Our “deep dive” into Cedarmere's partnership with Communities Rise later in this publication highlights how supporting new approaches to capacity building, including sabbaticals and shared leadership structures, created learning and opportunity for the Foundation and its nonprofit partner.

Outward-facing lessons: Engaging with and investing in your community



Lesson 4:

Relationship building and trust are foundational to cultivating authentic partnerships between foundations and the nonprofits they support.

In the world of philanthropy, the bedrock for trust is firmly grounded in the relationships that are built over time. These relationships act as essential stepping stones toward fostering trust, much like they do in personal connections.

Kathy and George prioritized relationship-building as a cornerstone of their approach to grantmaking and continuing support for community partners during and after their funding period. Because strengthening an organization is a process that takes time and requires ongoing commitment, Cedarmere decided to approach its grantmaking as a three-year commitment to its community partners, even though organizations were asked annually to identify what type of capacity building activities they wanted to pursue in the coming year. This extended timeframe created the space for trust to evolve naturally because it allowed the Foundation to gain a deeper understanding of its grant recipients' goals and for grantees to share their successes and challenges with the Foundation.

Because Cedarmere's community partners knew the Foundation's primary goal in funding them was to help them strengthen their organizations, there was less reluctance by grant recipients to talk about challenging issues. Moreover, the trusting relationships that Cedarmere developed with its grant recipients made it easy for the Foundation to be flexible and supportive when changing circumstances necessitated redirecting grant funding to different types of capacity building activities than initially identified.

Mutually beneficial relationships do not just happen because an organization receives a grant check, however. Trusting relationships require going beyond the grant process alone. Cedarmere learned that funders benefit when they seek out opportunities to connect with grantees and the communities they serve.

“*For Latino Community Fund, these capacity building grants gave us the opportunity to invest in the leadership of our team and our board of directors. We hosted our first board retreat and brought together our team from across WA at an annual retreat to build our collective vision for our Latino/e communities in WA State. It was truly powerful for us to hold space and celebrate the leadership of our own team.*

– **Lilliane Ballesteros**, Executive Director,
Latino Community Fund of Washington



Just months after Cedarmere made its first grants in 2007, Kathy and George decided to offer opportunities for grantees to come together and learn from one another through regularly scheduled Peer Exchange meetings, moving from merely a transactional grantmaking process to a deeper relational approach. These gatherings offered the added benefit of creating spaces for leaders to form long-term, supportive relationships with one another and with Kathy and George. Peer Exchanges emerged as one of the most significant ways that Cedarmere nurtured relationships with its community partners and gained insights into emergent issues, trends, and challenges facing them and the nonprofit sector as a whole. The knowledge and insights gained through these meetings helped inform future shifts in the Foundation’s focus and strategy.

Being open to relationships and learning significantly impacted Cedarmere’s evolution in grantmaking. In the early years, the Foundation looked to other funders as sources of referrals to the organizations they considered for future funding. Over time, however, a gradual shift occurred, making Cedarmere’s community partners the most frequent and influential sources of referrals to future grant recipients. That shift coincided with the Foundation’s decision to center equity as a lens through which future grant decisions were made. It also enabled Cedarmere to direct its support to the organizations and areas of the community that had the greatest needs but the least access to resources. By doing so, the Foundation was able to maximize the impact of its relatively small capacity building grants.

Cedarmere also simplified and streamlined its grantmaking process to make it less burdensome for community partners by eliminating written proposals and reports and replacing them with virtual check-in meetings in which organizations shared updates and plans for future grant funds. At the same time, these meetings provided yet another opportunity for connection and trust-building with community partners.

“*“You bet on the jockey not the horse”, meaning that what I learned, through cycles of leadership in small nonprofits, is that you have to invest in the people, not just the mission of the non-profit organization. Those competent leaders will carry the sector forward.*

– **George Edwards**, Cedarmere Co-founder and Trustee

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Lesson 5:

An investment in a nonprofit’s capacity, particularly in its leaders, is essential for long-term success and sustainability and ultimately makes all nonprofit work possible.

Capacity building – the process of building systems, structures, and skills and investing in the leadership that nonprofits need to succeed – makes all nonprofit work possible. Corporations and other for-profit businesses know they must invest heavily in their people and their infrastructure. They do so because they know such investments are essential to their success, and they can because no outside entity is asking them about their overhead ratio or telling them how they must spend their resources. In short, businesses have the flexibility to use their funding in whatever way is needed to achieve their goals. Not surprisingly, nonprofits need that same flexibility, but finding the funds for capacity building activities can be extremely difficult.

It intuitively makes sense that nonprofits will never be sustainable until the job of being a nonprofit leader is sustainable. However, there is a significant cost to achieving that goal, and most nonprofits will not have the necessary resources unless funders specifically provide them with capacity building support. The job of leading a nonprofit organization is challenging, stressful, lonely, and demanding. Those brave enough to take on this vast responsibility need training/coaching, opportunities for peer networking and support, a living wage, and time for rest and reflection. They also need the resources to train, support, and retain their staff and the tools and infrastructure to do the job. However, all these necessities require resources that are not restricted or directed to overhead or programs.

The nonprofit sector simply cannot thrive if it continues to lose experienced leaders because they become exhausted and burned out or seek better-paying jobs in the for-profit sector. The philanthropic community plays a vital role in being deliberate and proactive about addressing this critical and ongoing need.

Capacity building can include a wide range of activities focused on strengthening the internal operations and the people who bring a nonprofit's mission to life. Over the years, Cedarmere grants supported strategic planning, fund development training, building out evaluation systems, board development, training and coaching for executive leaders and other staff members, and funds for a much-needed sabbatical. See page 35 for a detailed list of funded capacity building activities.

Cedarmere observed time and time again the importance of flexibility and effective leadership in determining an organization's success in progressing toward its goals and desired outcomes. A leader's ability to shepherd an organization through challenges, foster growth, and navigate shifts in the landscape is crucial, but this process takes time and careful attention. Philanthropic support can play a valuable role in enabling leaders to thrive and guide their organizations toward success over the long term.

There is growing awareness in today's philanthropic sector that unrestricted, general operating funding is the gold standard and essential to sustaining and supporting the nonprofit sector. This is especially true in this post-pandemic period when nonprofits struggle with staff retention and recruitment and need flexibility to respond to changing circumstances. Cedarmere has consistently advocated for unrestricted giving while prioritizing designated support for capacity building.

Funders that also make grants designated to capacity building, in addition to their general operating support, empower nonprofit leaders and give them resources to focus on leadership training and development and infrastructure needs. In contrast, when funders assume capacity building needs will be met through general operating support grants, those needs often risk remaining unaddressed. The reality is that the cost of basic overhead expenses like rent and salaries must come first, usually fully depleting general operating grants. Many nonprofit leaders who have received designated capacity building funds shared how those grants are liberating rather than limiting. They can also be transformational, as we have seen time and time again.

The need for designated capacity building funds is especially true for smaller organizations that seldom have "spare" resources to divert from programs and overhead, no matter how pressing those capacity building needs may be. A capacity building investment can strengthen an organization's operations and leadership, which, in turn, almost always leads to improved programs and a better functioning team. Directing funding for these activities, even grants as small as \$5,000 - \$15,000, can make a significant difference to an organization's success and the well-being of its staff.



From left to right: Ventures, OneAmerica

The Stanford Social Innovation Review published an article entitled "Leadership Development: Five Things All Nonprofits Should Know" by James W. Shepard, Jr. in its May 14, 2014 edition. Shepard pointed to the powerful impact leadership support can have when he said, "Strengthening leadership development results in more mission impact, higher revenues, lower costs, and greater stability."

The benefits that nonprofits derive from well trained, confident, effective leadership became apparent to Cedarmere's board more than a decade ago as well. From that point on, Cedarmere's board made leadership development a priority in its capacity building grantmaking and witnessed remarkable results from those investments.

Shepard, J. (2017). Leadership Development: Five Things All Nonprofits Should Know. Stanford Social Innovation Review. Retrieved from https://ssir.org/articles/entry/five_nonprofit_leadership_development_facts.

The Transformative Impact of a Small Capacity Building Grant



During its 18 years of grantmaking, Cedarmere observed many organizational transformations made possible with small grants restricted to capacity building when they were implemented by effective leaders committed to strengthening their organization and supporting their team. One such organization was Mary's Place, founded in 1999 as the Women's Day Center in downtown Seattle. The organization now operates several 24/7 family shelters with wraparound housing, employment, and health resources across King County and a mobile outreach team with a mission to ensure that "no child sleeps outside" by centering equity and opportunity for women and families.



Cedarmere made capacity building grants to Mary's Place from 2014-2016. When Cedarmere made its first grant, Mary's Place had an annual budget of \$1.5 million with a staff of 29. They wanted to scale up to meet the growing demand for services but needed support to develop human resources policies and protocols and management training for the growing team. This growth coincided with a shift from a grassroots mindset to a more formal organizational structure. By the time Cedarmere made its third and last grant to Mary's Place in 2016, its budget had already grown to \$4.4 million, accompanied by a similar growth in staff and commensurate growth in the number of women and families served.

Mary's Place's founding Executive Director, Marty Hartman, led the organization through tremendous growth over her 24 years of service. By the time she retired at the end of 2023, the organization's budget had reached \$30 million, with a staff of more than 300. Cedarmere's grants, while small in size, had a remarkable impact, helping Mary's Place strengthen its organizational foundation by building capacity around essential operational functions necessary to manage and sustain this growth. Until the organization developed those critical HR policies and procedures, it did not have the capacity to grow its staff enough to meet the ever-increasing demand for its services. Equally importantly, in Marty's words, "Cedarmere's capacity building grant gave me the permission I needed to invest in this critical organizational infrastructure."

“When we received the grant from Cedarmere, it marked the first time we reached out for help to build, grow, train, and develop our team. It was a powerful moment that showed us the value of investing in our people, not just our programs. This journey led us to ask for support from other funders and to build and grow our organization. It taught us that structuring ourselves differently could allow us to meet external needs more effectively. It allowed us to do the critical work of connecting with our team and developing training programs to sustain our organization with the right skill sets.”

– Marty Hartman, former Executive Director of Mary's Place

Nonprofit boards can play a critical role in supporting executive directors and other key organizational leaders. Investing in training and development for the board to better understand governance and its role in supporting the organization is a key component of a nonprofit's ability to succeed and thrive. Similarly, training for executive directors on building relationships with board members and working together benefits all aspects of the organization's operations.

Hamlin Robinson School

One of Cedarmere's early community partners, Hamlin Robinson School, is a powerful example of how an investment in an organization's governing board can have a pivotal and lasting impact. With its mission to serve students with dyslexia and other language-based learning differences, Hamlin Robinson School has been a crucial educational resource in Western Washington since its founding in 1983. However, for most of its existence, the school lacked a permanent location, resulting in frequent relocations that often posed severe challenges for enrolled families and created ongoing financial instability.

In the early 2010s, under the leadership of Joan Beauregard, an opportunity emerged for the school to secure a permanent home. The multi-year grants from Cedarmere supported Joan and the development team in working with their board to facilitate the creation of a new mission, vision, and core values, along with strategic planning and governance training. Realizing the importance of finding a permanent home, the board embraced a visionary approach and summoned the courage to launch its first-ever capital campaign, reaching the \$10 million goal in less than a year – a feat that was unthinkable to the board only a few years earlier, before their capacity building work and strong leadership gave them the courage to dream big.

With its new, permanent location near one of Seattle's major crossroads at the intersection of I-90 and I-5, the school has seen enrollment soar since its first campus building was completed in 2015. The school has also been able to greatly enhance what it offers to the community through a robust financial aid budget that makes the school accessible to a broader range of students with learning differences, a new athletic facility, and a new building for middle school students that opened in January 2023 to meet the need to serve older students. Although Cedarmere's grants were relatively small, the impact was transformative for Hamlin Robinson because it created a more engaged board that understood its role in advancing a collective vision for the school.

The Role of a Nonprofit Board in Capacity Building Efforts



“ *More than just financial support, it's Kathy and George's personal commitment that sets them apart – a fusion of resources, both monetary and energetic. It's a rare gem in the world of grantors. They didn't just provide professional development for our board; they came in as two highly knowledgeable individuals who made an enormous impact. It's a model others should adopt. They gave our board the chance to witness belief and investment in their leadership.* ”

– Joan Beauregard, former Head of Hamlin Robinson School

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“ *Cedarmere Foundation recognized the amazing opportunity that spending down their endowment gave them to make significant investments in the local nonprofit community - a community they cared very deeply about and had spent decades getting to know. Spending time developing a legacy vision and values allowed the board to award sunseting grants that directly aligned with what they cared about - supporting nonprofit leaders in our region, and especially Black leaders, Indigenous leaders, and leaders of color.*

– **Melanie Matthews**, Executive Director and former Cedarmere Community Trustee

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Lesson 6:

Those closest to the challenges being addressed, i.e. the community being served, know best how to solve those challenges with appropriate solutions.

When considering how to support a community or address an issue, funders have historically prescribed solutions based on a specific agenda, often their own, that frequently has not come from the community being served. To truly support positive change, the most effective funders create opportunities for communities to voice their perspectives and identify their own priorities. When funders listen and act as advocates for organizations and causes that align with these community-led visions, everybody wins. By collaborating with other funders and amplifying the voices of the communities served, philanthropy as a sector, in partnership with nonprofits, can foster greater impact and more meaningful progress, whatever the challenges or causes they are addressing.

Creating space and opportunity for communities to implement strategies and solutions grounded in their vision shifts the power to a more balanced relationship. Philanthropy also gains from this shift through building trusting relationships that can lead to greater impact. When funders truly regard nonprofit organizations as partners in solving community problems, the relationship and the outcomes are far more likely to be successful, bringing us back to the important lesson of relationship building.

Cedarmere’s understanding of leadership evolved over the years. As the Foundation built more trusting relationships with nonprofit leaders, it came to a more nuanced understanding that leadership can look different across communities. Talking to our community partners helped us to deepen our understanding of what leadership can be and inspired us to invest in a broader range of capacity building nonprofits.

Lessons from a Funder-Community Partner Relationship



Cedarmere Foundation partnered over many years with Communities Rise and its two predecessor organizations, Wayfind and the Nonprofit Assistance Center (NAC). Communities Rise fosters movements to build power in communities impacted by systemic oppression. Grounded in principles of trust, learning, and community building, this partnership greatly informed the Foundation's key lessons learned, especially those related to the importance of building relationships, seeking solutions from the community, taking calculated risks to achieve powerful outcomes, and most significantly, investing in capacity building as a core component of grantmaking.

The relationship between Cedarmere’s board and Communities Rise’s leadership, especially Kathy and George Edwards and leaders Jodi Nishioka and Sarah Tran, throughout their 12-year partnership, influenced the Foundation’s increased commitment to equity. It also heightened trustees’ awareness of the critical role capacity building organizations play in supporting the nonprofit sector. Strengthening the organizations closest to under-resourced communities and those who have faced systemic barriers to accessing funding builds power in communities and fosters greater equity.

This case study explores the evolution of the partnership between the Cedarmere Foundation and Communities Rise and offers a lens to view the transformational impact of capacity building investments on community-based organizations and how foundations can, in turn, learn, grow, and increase their impact through authentic partnerships.

“*Cedarmere walked alongside us throughout my time at Communities Rise, supporting us as we matured and grew steadily. They provided us with capacity building funding, mentoring and community connection support along the way.*

– **Jodi Nishioka**, *Founding Executive Director of WAACO/Wayfind and Communities Rise*

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Communities Rise was formed in 2019 from a merger between two separate but complementary nonprofits. The first was Washington Attorneys Assisting Community Organizations, which later changed its name to Wayfind, a newly created nonprofit that Jodi Nishioka stepped up to lead in 2012 and subsequently took through major growth and development. The second nonprofit was Nonprofit Assistance Center (NAC), which Sarah Tran stepped in to lead in 2015, helping to revive and greatly strengthen this important organization whose mission was to support BIPOC nonprofit leaders.

After sharing office space for several years, the boards and staff of Wayfind and NAC recognized an opportunity to leverage their strengths and maximize their impact by coming together as Communities Rise. The merger enabled the newly formed organization to focus on helping clients and organizations achieve their desired results through peer learning cohorts, individualized coaching, fundraising workshops, pro bono legal services and clinics, and other training opportunities. Communities Rise also supports cross-sector collaboration to improve the landscape in which their communities work by advocating for increased funding, support, and resources for BIPOC businesses. The significant impact that Communities Rise has had in meeting community needs since the merger is a testament to the wisdom of that decision.

The impact of capacity building support for Communities Rise

Communities Rise, and its predecessor organizations, experienced significant transitions and transformations during their 12-year partnership with the Cedarmere Foundation. These included taking a nascent organization from concept to effective service provider, reviving an organization about to close its doors, successfully completing a merger, navigating increased challenges and demand for services created by the pandemic, deeply engaging in succession planning, and adopting an innovative shared leadership structure. Access to sustained capacity building investments allowed for innovation in addressing challenges and opportunities, ultimately supporting Communities Rise as it grew into the strong, sustainable, and thriving organization it is today.

Strategies to foster health and wellbeing

As Executive Director of Wayfind and, later, Communities Rise, Jodi Nishioka regularly participated in Cedarmere’s Peer Exchange meetings with other nonprofit leaders. At a February 2020 meeting, Jodi shared with Kathy and George how taxing for her the more than 18-month merger process had been. After discussing strategies with Jodi that could help sustain her leadership, including the possibility of a sabbatical, Kathy and George went back to their board and recommended that it approve a \$20,000 capacity building grant for Communities Rise. The board enthusiastically supported this grant, even before it had received an official request to do so, to fund staff and organizational needs before, during, and after a 3-month sabbatical for Jodi. While this was a new type of investment for the Foundation, Cedarmere’s trustees fully supported it because they were very clear that the cost to the nonprofit sector of losing an effective leader like Jodi was far higher than the resources needed to make her sabbatical possible.

Due to the unprecedented challenges posed during the first year of the pandemic, Jodi decided it was necessary to postpone her sabbatical until 2021. In response to these challenges, Communities Rise committed its resources to meeting the urgent needs of BIPOC communities and others already negatively affected by systemic inequities. Many nonprofit leaders experienced burnout and had to confront the reality that COVID-19 revealed, namely that many solo Executive Director leadership structures were not sustainable. While Communities Rise had already begun considering questions around the sustainability of leadership and staff prior to the pandemic, Jodi’s anticipated sabbatical added some urgency to the task of reexamining its leadership structure in a much deeper way.

Redefining what leadership looks like to create more sustainable models

Exploring alternative leadership models that might better serve Communities Rise’s mission was grounded in its hope to create long-term sustainability for the organization and its staff. When Jodi announced that she planned to leave at the end of 2022, Communities Rise decided early on to prioritize the growth and leadership of its current staff rather than embarking on a traditional Executive Director search. Cedarmere’s funding supported the organization’s work with consultants Kad Smith and Michelle Gislason during the two-year process for Communities Rise to develop its succession plan and a more permanent shared leadership structure.

The importance of effective leadership and access to capacity building resources emerged as two of the most essential elements Cedarmere observed that enable nonprofits to effect change in their communities.

“*Relationship building with a funder is like any relationship, but there’s this power piece we have to talk about. Being willing to exercise trust in community organizations as the best source of information on their community needs is critical. Especially for foundations with mostly white trustees and leaders, I think there’s a part of navigating that dynamic that really requires an earned relationship and trust with core community members from different BIPOC communities.*

– Bri Jones, Co-Executive Director, Communities Rise

Communities Rise also consulted with other nonprofit organizations that had implemented shared leadership structures, including Cedarmere grantee RVC, to better understand how they had developed their own alternative leadership structures and what kind of conflict resolution mechanisms and decision-making processes they had implemented to support these new structures. After completing the process in March 2023, the board appointed Annie Hout as Co-Executive Director of Finance and Operations, Brianna Jones as Co-Executive Director of Capacity Building, and Andrew Kashyap as Co-Executive Director of Legal Services. During this same time, Jodi transitioned to her new role as a Co-Executive Director of the BIPOC ED Coalition of WA. Also, in 2022, in line with the organization’s commitment to rest and wellness as a core building block of sustainability, Community Rise’s board decided to codify opportunities for rest, healing, and renewal by approving a sabbatical policy for all of its staff members.

Communities Rise’s new structure also created opportunities for its board to build relationships and trust with staff beyond a single Executive Director. These relationships allow board members to connect with staff closest to the communities served who are better positioned to bring their lived experience and knowledge to inform key decisions and strategies.

The support from Cedarmere, along with other funders that invested in its internal organizational work, helped Communities Rise achieve its current stability and resilience. The ongoing funding also contributed to a more sustainable structure that was critically important in the aftermath of the pandemic.

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Communities Rise created an Alternative Leadership Toolkit to share what they learned through their own process and from other organizations exploring shared leadership models. The Toolkit is available at: <https://www.coopartnerships.org/alt-leadership-toolkit>

Communities Rise



Key takeaways from this long-standing partnership

The relationship Kathy and George cultivated with Jodi Nishioka and Sarah Tran created a foundation of trust. That trust, in turn, led Cedarmere’s trustees to be more open and willing to invest in new approaches to strengthening organizations. These partnerships also contributed to a deeper understanding of equity and the importance of funding BIPOC-led and BIPOC-serving organizations. They created a natural pathway for Cedarmere to practice more trust-based philanthropy centered on the community’s needs and priorities.

The following four tangible recommendations, embedded in Cedarmere’s lessons learned, offer guidance to other funders interested in building authentic partnerships to better meet community needs.

1 Maximize impact through multi-year funding

Because building stability and resilience takes time and requires persistent effort, multi-year funding is essential to creating long-term results. Over the years, Cedarmere’s grants to NAC, Wayfind, and Communities Rise provided a steady stream of funding for various capacity-building activities to support the people doing the work and strengthen the internal systems to build a healthy, enduring organization. Cedarmere’s quarterly Peer Exchange convenings and other opportunities to connect with NAC, Wayfind, and later Communities Rise’s leadership provided Kathy and George with ongoing opportunities to understand more deeply the challenges faced by each organization. Because of this strong connection, they could more easily persuade the rest of Cedarmere’s trustees to make investments that might have initially seemed non-traditional and risky, including exploring leadership sustainability strategies. It also opened Cedarmere up to new ideas of what support for leadership could look like, which strongly influenced the focus of the Foundation’s sunsetting grants.

2 Advocate for community partners with other funders

With the deepening relationship, Cedarmere became an advocate with other funders for NAC, Wayfind, and Communities Rise, opening doors to potential new funding sources. Organizations addressing systemic racism and other forms of oppression often experience more limited access to resources, creating a misleading perception of scarcity. Advocating for organizations that may not have access to funding sources due to these systemic inequities can be catalytic by opening doors to new opportunities for support. These connections bring value by removing barriers, raising awareness of an organization’s work, and creating opportunities to build skills and experience in advocating for support from the funding community.

3 Elevate equity and learn from community partners

Cedarmere’s approach to building relationships and creating spaces to connect with community partners through the Peer Exchange meetings, site visits, and check-in meetings all contributed to learning about the needs and effective practices of the people and organizations doing the work. These relationships also contributed to the personal growth of many Cedarmere trustees as the board developed a better understanding of the inequities in our community. By centering equity in its conversations and decision-

“ *Having continued support from Cedarmere and our other funders throughout a number of internal transitions at Communities Rise demonstrated their trust in us and our work. It helped us spend the time needed to achieve stability and support good decision-making processes that have resulted in a sustainable structure for our work.*

– **Aimie Kawai**, *Development Director at Communities Rise*

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“*Cedarmere’s willingness to advocate in its own way for its grantees like bringing them up in conversations with other funders goes a really long way. It can be hard to get in the room or get an introduction to other funders. I valued and respected Cedarmere’s willingness to invest in relationships with its grantees. And that trifecta of providing financial support, over multiple years, and being an advocate was very powerful. I’d love to see more funders follow suit. These factors were key to my decision to join the Board when invited.*

– Sarah Tran, Former Executive Director, NAC and Cedarmere Community Trustee

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making and directing grants to underserved communities, the board was able to significantly increase the impact of its small capacity building grants. Adding more community trustees to the board, including Sarah Tran, also provided a valuable perspective on being responsive to community needs and trends and applying an equity lens in decision-making.

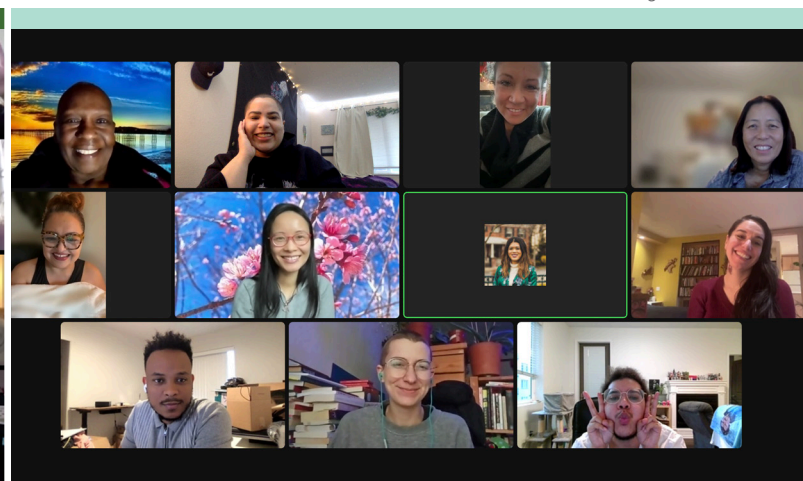
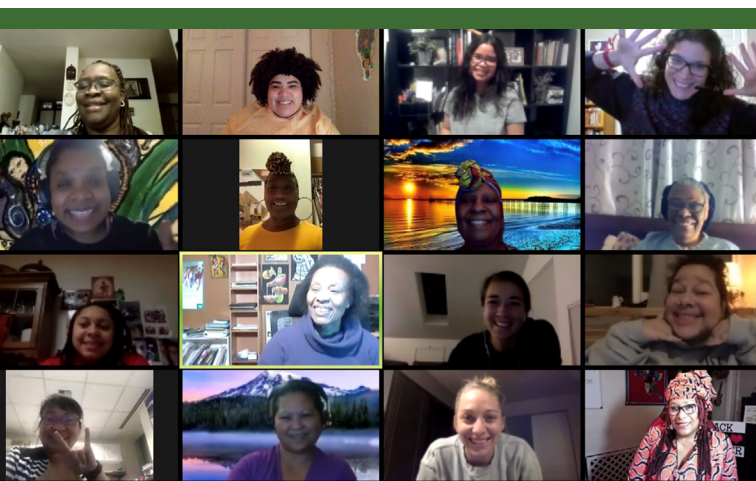
4 Increase impact by funding capacity building organizations focused on reaching underserved communities

In 2020, Cedarmere made the decision to end its grantmaking to direct service organizations and, instead, to fund capacity building organizations exclusively. The board’s experience supporting NAC, Wayfind, Communities Rise, and RVC (Rooted in Vibrant Communities, formerly known as Rainier Valley Corps), another of the Foundation’s long-term community partners, helped inform this decision. Trustees learned from each of these organizations that investing in strengthening a capacity building organization has an even broader reach because it directly impacts the organizations and communities those capacity builders support, including numerous small, BIPOC-led and -serving nonprofits and community groups. This shift in focus led Cedarmere to seek out other capacity building organizations to fund. During the Foundation’s last four years of grantmaking, Cedarmere partnered with ten additional Seattle area capacity building organizations to further strengthen the communities and organizations they support.

Conclusion

As Cedarmere ends its philanthropic giving, its partnership with NAC, Wayfind, and later, Communities Rise, continues to represent a legacy and lessons that the Foundation hopes will have a deeper impact beyond these organizations. By sharing learning derived from partnerships like these, Cedarmere hopes to inspire other funders to invest in effective leadership and provide access to capacity building resources because doing so greatly enhances the ability of nonprofits to effect positive change in our community.

From left to right: Communities Rise



Ways that Foundations Can Better Support Under-Resourced Communities

The following recommendations emerged from conversations between the Cedarmere Foundation and Communities Rise.

- Increased community investments, especially transformative funding that enables organizations to design and implement systemic change, are critical to addressing the systemic issues that perpetuate inequities in our communities.
- Communities need foundations to actively move more funding into their hands to do the work sustainably. Cedarmere's decision to sunset, thereby investing its entire endowment in the community, is one example of a way to move more funds and power into communities where change needs to happen.
- Transformative work is possible when foundations directly fund and transfer power to marginalized communities historically excluded from access to resources.
- Adopt a trust-based approach to philanthropy, understanding that the community closest to the issues knows best how to resolve those issues.
- Simplified grant application processes based on trusting relationships, including fewer reporting requirements and shorter applications, decrease funding barriers and save organizations precious time. This is especially important for smaller organizations with limited capacity to manage grants.
- Funding relationship-building work, especially across organizations and collaborations, is needed to support the time and effort required to foster authentic, trusting partnerships.

Real change and transformation take time. By walking alongside community partners doing the work, funders learn, grow, and evolve how they approach grantmaking to actively support organizations and communities in realizing their desired outcomes. For every member of Cedarmere’s board, this work enabled them to learn and grow. They now understand their community better and know that the Foundation’s work impacted many people and organizations that make our community better for all of us.

Cedarmere’s Final Legacy Investments

For Kathy and George, learning about our community’s needs and challenges, getting to know so many of the amazing people who have committed their lives to address those challenges, and seeing the ability of capacity building support to transform individuals, organizations, and communities was an opportunity of a lifetime. This 18-year journey was the most rewarding work either of them had ever done.

While Cedarmere’s philanthropic giving came to an end in 2024, the trustees hope the Foundation will be remembered within our community as a champion of capacity building support and that its shared lessons learned will inspire and motivate others to support capacity building in the years to come. Capacity building organizations like those listed below, provide the backbone of support to a great many smaller but critically important local organizations.

The Cedarmere Foundation chose to make the following final sunseting grants in order to contribute to the realization of its legacy vision of “Strong, thriving nonprofit leadership equipped to navigate an uncertain future with the support of a funding community committed to investing in capacity building.”

The impact of Cedarmere’s 18 years of capacity building grantmaking will be magnified manyfold if other funders invest in capacity building as a core strategy towards making the organizations that serve our communities more effective, sustainable, and resilient.

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|-------------------------------------|-------------|
| BIPOC ED Coalition of WA | \$1,000,000 |
| Byrd Barr Place | \$90,000 |
| Communities Rise | \$90,000 |
| Front and Centered | \$90,000 |
| JustLead Washington | \$90,000 |
| Latino Community Fund | \$90,000 |
| Na’ah Illahee Fund | \$90,000 |
| RVC (Rooted in Vibrant Communities) | \$90,000 |

Final Legacy Grants: BIPOC ED Coalition of WA

The BIPOC ED Coalition of WA, formed in 2020, is a coalition of 240+ BIPOC nonprofit leaders across Washington State who joined in solidarity to promote wellness and restore resources in their communities. Through healing and advocacy, the Coalition's multicultural, cross-sector collaborative works to nourish their collective well-being and generate shared abundance.

All four co-founders of the Coalition are former leaders of nonprofit organizations previously funded by the Cedarmere Foundation: Jodi Nishioka (Communities Rise), Andrea Caupain Sanderson (Byrd Barr Place), Victoria Santos, (Young Women Empowered), and Ananda Valenzuela (RVC). During the years that their organizations received capacity building grants, Cedarmere built relationships with these amazing leaders defined by mutual trust, respect, and admiration.

The importance of tending to the well-being of nonprofit leaders reached an inflection point during the pandemic and continued during the recovery period as community leaders were pulled and stretched to unsustainable levels. It was exhausting for all nonprofit leaders to continuously respond to crises and emergent issues and navigate all the unprecedented situations that sprang up. In addition, for BIPOC communities, the racial reckoning and the ever-present disparities in outcomes across every system created a call to action for many BIPOC leaders to form a coalition to mobilize together for enduring change. They knew many of them were near or at the breaking point and desperately needed relief.

In response to this need, in 2021, the Coalition launched its Sabbatical Leadership Award Program based on the importance of providing BIPOC leaders with time to “rest, recharge, and reimagine.” Sabbatical Award applications were accepted from BIPOC leaders throughout Washington State who had been with their organization for at least five years. These awards included funding to support the organization during the leader's absence and resources for the leader to use during the 3-month sabbatical period. The Coalition has continued to award sabbatical grants in addition to two-week and one-month respite grants.



As Cedarmere further defined its sunsetting strategy and began considering investments aligned with its legacy vision and values, the BIPOC ED Coalition of WA emerged as a clear partner in achieving the Foundation's goal to invest in the development, support, and sustainability of nonprofit leadership. When Cedarmere engaged with its grant recipients and other community leaders to learn their thoughts on how to have the most significant impact through its final legacy grants, funding the BIPOC ED Coalition of WA was frequently prioritized. As a result, the board approved its single largest grant of \$1 million to support the Coalition's goal of creating the infrastructure for systemic change around wellness and rest for BIPOC leaders. This grant also provided resources to build a program that supports nonprofit organizations shifting to or exploring shared leadership structures.

The Foundation's seven other legacy grants were similarly awarded to capacity-building organizations that clearly focus on developing, supporting, and sustaining leadership. They carry out this work either within the communities and nonprofit partners with whom they work or within the dozens of organizations for which they serve as fiscal sponsors. It is our intention and hope that, through this work, Cedarmere's grants will move the nonprofit organizations in our community closer to realizing our legacy vision in the years to come.

APPENDICES

Total Funding Investments by Area of Focus

Total distributed by Cedarmere in grants
\$3,385,000

Total distributed by Cedarmere for sunseting grants
\$1,630,000












Other investments made by Cedarmere Foundation

- Statewide Capacity Collaborative membership
- Immigrant & Refugee Collaborative
- Washington State Census Funding Partnership

How community partners chose to invest Cedarmere’s grants to build their capacity from the most to the least commonly supported activity.

- Strategic planning
- Special (evaluation, sabbatical, program specific, specialized training)
- Board training (governance, fundraising, financial management)
- Marketing
- Equity training
- Executive Director training and coaching
- Fundraising training
- Miscellaneous staff training
- Software/technology and related training
- Board and organization assessments
- Unrestricted emergency pandemic funding
- Leadership transitions
- Staff capacity
- Financial management

Cedarmere’s Community Partners

| Capacity Building Organizations | | | | |
|---|--|-----------------|----------------|---|
| | | Years Funded | Total Received | Website |
|  | Communities Rise | 2019-2023 | \$85,000.00 | https://communities-rise.org/ |
| | Nonprofit Assistance Center* | 2016-2018 | \$32,500.00 | N/A |
| | WAACO>Wayfind* | 2012-2014, 2018 | \$28,000.00 | N/A |
|  | Byrd Barr Place | 2021-2023 | \$45,000.00 | https://byrdbarrplace.org/ |
|  | Community Credit Lab, an affiliated 501(c)3 entity of Common Future | 2021-2023 | \$45,000.00 | https://www.commonfuture.co/ |
|  | Front and Centered | 2021-2023 | \$45,000.00 | https://frontandcentered.org/ |
|  | JustLead Washington | 2020-2022 | \$45,000.00 | https://justleadwa.org/ |
|  | Latino Community Fund of Washington | 2020-2022 | \$45,000.00 | https://www.latinocommunityfund.org/ |
|  | Na’ah Illahee Fund | 2020-2022 | \$45,000.00 | https://naahillahee.org/ |
|  | OneAmerica | 2020-2022 | \$45,000.00 | https://weareoneamerica.org/ |
|  | RVC (Rooted in Vibrant Communities - formerly Rainier Valley Corps) | 2016-2023 | \$104,000.00 | https://rvcseattle.org/ |
|  | Seattle Arts and Culture for Anti-Racism | 2021-2023 | \$45,000.00 | https://www.seattleantiracism.org/ |
|  | Sound Child Care Solutions | 2021-2023 | \$45,000.00 | https://www.soundchild.org/ |

*NAC and Wayfind merged to form Communities Rise in 2019.

Cedarmere's Community Partners

| Direct Service Organizations | | | |
|---|-----------------|----------------|---|
| | Years Funded | Total Received | Website |
| Art With Heart | 2014, 2016-2017 | \$22,150.00 | https://artwithheart.org/ |
| Boyer Children's Clinic | 2011-2012 | \$9,000.00 | https://www.boyercc.org/ |
| API Chaya | 2007-2009 | \$9,160.00 | https://www.apichaya.org/ |
| Children's Alliance | 2009-2011 | \$10,500.00 | https://www.childrensalliance.org/ |
| Cocoon House (Jr. Member grant in 2013) | 2013-2014 | \$9,000.00 | https://www.cocoonhouse.org/ |
| College Possible | 2014-2016 | \$25,000.00 | https://collegepossible.org/ |
| Delridge Neighborhood Dev. Assoc. | 2019-2021 | \$45,000.00 | https://dnda.org/ |
| East African Community Services | 2007-2008 | \$7,500.00 | https://www.eastafricans.org/ |
| Eastside Legal Assistance Program | 2019-2021 | \$45,000.00 | https://elap.org/ |
| Families of Color Seattle | 2019-2021 | \$42,000.00 | https://www.focseattle.org/ |
| Family Law CASA | 2009-2011 | \$11,500.00 | https://familylawcasa.org/ |
| Families for Effective Autism Treatment of WA | 2014-2015 | \$9,000.00 | https://feat.org/ |
| Friends of the Children Seattle | 2016-2018 | \$24,500.00 | https://friendsseattle.org/ |
| Green Plate Special* | 2018-2020 | \$37,000.00 | |
| Hamlin Robinson School | 2011-2013 | \$14,000.00 | https://www.hamlinrobinson.org/ |
| Homestead CLT | 2016-2018 | \$30,000.00 | https://www.homesteadclt.org/ |
| HopeSparks! | 2008-2009 | \$6,300.00 | https://hopesparks.org/ |
| Jubilee Women's Center | 2010-2012 | \$18,000.00 | https://jwcenter.org/ |

| Direct Service Organizations | | | |
|--|----------------------|----------------|---|
| | Years Funded | Total Received | Website |
| Kandalia (formerly Vietnamese Friendship Assoc.) | 2017-2019 | \$35,000.00 | https://www.kandelia.org/about/ |
| Coalition Ending Gender-Based Violence | 2010-2012 | \$13,000.00 | https://endgv.org/ |
| Mary's Place | 2014-2016 | \$30,100.00 | https://www.marysplaceseattle.org/ |
| Worldwide Fistula Fund (formerly One By One) | 2007-2008 | \$7,100.00 | https://worldwidefistulafund.org/home |
| Passages Northwest* | 2009-2010 | \$6,500.00 | |
| PEPS | 2007-2009, 2012-2014 | \$28,400.00 | https://www.peps.org/ |
| Powerful Schools* | 2010 | \$3,500.00 | |
| Powerful Voices | 2007-2009 | \$7,840.00 | https://www.powerfulvoices.org/ |
| Seattle Milk Fund* | 2008, 2010 | \$8,000.00 | https://new.expo.uw.edu/expo/scholarships/SeaMilkFund |
| Seattle Works* | 2014-2016 | \$26,000.00 | |
| Team Read | 2012-2013, 2015 | \$14,500.00 | https://www.teamread.org/ |
| The Healing Center | 2016-2018 | \$26,755.00 | https://healingcenterseattle.org/ |
| the Service Board | 2007-2008 | \$7,300.00 | https://theserviceboard.org/ |
| Ventures | 2019-2021 | \$45,000.00 | https://www.venturesnonprofit.org/ |
| Nonprofit Association of Washington (formerly Washington Nonprofits) | 2014-2016 | \$13,000.00 | https://nonprofitwa.org/ |
| West Seattle Helpline/ Food Bank | 2017-2020 | \$40,000.00 | https://westseattlefoodbank.org/ |
| Young Women Empowered (Y-WE) | 2016-2018 | \$27,500.00 | https://youngwomenempowered.org/ |
| Zeno (formerly Explorations in Math) | 2009-2010 | \$6,500.00 | https://zenomath.org/ |

*These organizations either closed or have merged with another organization.

Cedarmere Foundation Trustee and Staff Profiles

Current members of Cedarmere's Board of Trustees and their years of service



Kathy Edwards

Co-founder and Board President: 2006 - 2024

Kathy has a Ph.D. in Human and Organizational Systems and consulted with nonprofit organizations on governance, leadership, and organization development for more than 25 years before founding the Cedarmere Foundation in 2006. She is also Bob Watt, Wendy Watt, and Christie Biesold's mother.



George Edwards

Co-founder and Board Secretary: 2006 - 2024

George is a retired Air Force Colonel who also spent 35 years leading nonprofit organizations, including five independent schools in Washington, Texas, and Alabama. He is Kathy's husband, and Bob, Wendy, and Christie's step-dad.



Bob Watt

Vice President: 2006 - 2024

Bob is a gemologist and owner of Exact Gems International. He is also a commercial real estate property manager for LCF Associates. He is Kathy and George's son, Christina's husband, and Bobby's father.



Amy Zimerman

Treasurer: 2014 - 2024

Amy has worked as a nonprofit executive, educator, and consultant for 20 years. She became the Director of People & Culture at MOHAI in 2022. Amy served on Cedarmere's board for 10+ years, longer than any other community trustee.



Beto Yarce

Trustee: 2022 - 2024

Beto worked at Ventures, one of Cedarmere's community partners, for 12 years, the last eight of which he served as its Executive Director. He was appointed by President Biden in 2023 to be the Director of the Small Business Administration's office for Region 10, which includes Alaska, Idaho, Oregon, and Washington.



Sarah Tran

Trustee: 2022 - 2024

Sarah served as the Executive Director of the Nonprofit Assistance Center for more than four years before starting her own consulting practice, Sama Praxis, which focuses on supporting nonprofit organizations and their leaders.

Staff



Melanie Matthews (Executive Director)

2022 - 2024

Melanie served as COO of the Champion Foundation and Champion Advocacy Fund for more than a decade before starting her own consulting practice, Brassington Consulting, in 2019. She currently works with nonprofits and funders, both 501(c)(3)s and 501(c)(4)s, to build a strong and healthy sector. She served on the Cedarmere board 2020-2021, resigning to become Cedarmere's Executive Director in December 2021.



Danielle Baer (Grants and Communications Manager)

2019 - 2024

Danielle has worked in the non-profit and public sectors in the Puget Sound region for more than 20 years in direct service, policy and advocacy, project management, communications, and fund development. She launched her own consulting business Danielle Baer Consulting, in 2019 to support nonprofits in strengthening their mission-driven work.



Bridget Dolan (Grants Manager)

2015 - 2018

Bridget worked at Epiphany School from 2006-2016 in various roles. She later became the Philanthropic Events Manager at Woodland Park Zoo (WPZ) while also serving as Cedarmere's Grants Manager. In 2018, Bridget left both WPZ and Cedarmere to become the Executive Director of The Goodtimes Project, a nonprofit that provides camp experiences for children and families affected by childhood cancer.

Past Board Members



Christie Biesold
2006 - 2008

Christie was instrumental in developing Cedarmere's initial policies, procedures, and grantmaking strategies. She is now a certified intuitive Homeopath and a founding member of the Homeopath Hive, a group that treats neurodiverse/complex children. She is also Kathy and George's daughter and Courtenay's mother.



Christina Watt
2006 - 2013

Christina has worked in communications and organization development for several local companies, including Starbucks, Seattle Children's Hospital, and Microsoft. She is currently completing a Master's degree in Organization Development from Pepperdine University. She is Kathy and George's daughter-in-law, Bob's wife, and Bobby's mother.



Wendy Watt
2006 - 2013; 2018 - 2021

Wendy was an elementary and middle school teacher for 25 years before starting at Clarity Parent Coaching in 2024. She is Kathy and George's daughter.



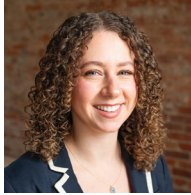
Todd Biesold
2009 - 2020

Todd is the CFO of Merlino Foods and is Kathy and George's son-in-law and Courtenay's step-dad.



Tanya Kim
2015 - 2020

Tanya was the Executive Director of Powerful Voices when she met Kathy and George in 2007. Eight years later, after she had transitioned to a leadership position in the City of Seattle's Department of Human Services, she joined the Cedarmere Foundation board. She became the Director of Human Services for the city in 2023.



Courtenay Brennan
2021 - 2022

Courtenay is a law school student at Seattle University and plans to graduate in 2025. She is also Kathy and George's granddaughter and Christie and Todd's daughter.



Bobby Watt
Junior Trustee: 2022 - 2023

Bobby is a student at Loyola Marymount University. He is Kathy and George's grandson and Bob and Christina's son.

Acknowledgments

Over the last 18 years, we have learned so much from so many people and organizations that have informed and shaped our continuously evolving grantmaking program. We are indebted to the following individuals, organizations, and associations for sharing their knowledge, wisdom, and perspectives with us on that journey. Thank you from all of us at the Cedarmere Foundation. You made us better philanthropists!

Thank you to the following organizations and associations.

- Exponent Philanthropy
- Grantmakers for Effective Organizations
- National Center for Family Philanthropy
- Nonprofit Association of Washington
- Philanthropy Northwest
- Social Venture Partners-Seattle
- Statewide Capacity Collaborative
- The Seattle Foundation
- WA Immigrant and Refugee Funder Collaborative
- Washington Women's Foundation
- Women's Funding Alliance
- The 51 community partner organizations we had the privilege of supporting (see pages 35-36).

Thank you to the following individuals.

- Ali Peters, formerly with the City of Seattle and now at the King County Department of Community and Human Services, shared data that influenced our move to supporting BIPOC-led and BIPOC-serving organizations.
- Erin Borla, Executive Director/Trustee, The Round House Foundation
- Frank Merrick, Consultant, Foundation Management Inc.
- Kristi Petrie, Co-Executive Director, AJL Foundation
- Sarah Tran, Consultant, Sama Praxis

Photographer credits:

Ling Ling Zheng (Cedarmere trustee photos), Mel Ponder (Cedarmere trustee and staff photos and OneAmerica photos), and all the photographers whose names we have not been able to uncover but whose work has made this publication immeasurably better.

For their thoughts on the sunseting process:

Keiki Kehoe (formerly Brainerd Foundation), Keiki Kehoe Consulting; and Lenore M. Hanisch (formerly Quixote Foundation).

For their support during the sunseting process:

Akiko Baron (Akiko Baron Design, LLC), Allison Carney (Allison Carney Consulting), Jennifer Martin (Jen Martin Co.), and Nancy Bacon (Nancy Bacon Consulting).

Plus all of the other nonprofits, consultants, and funders with whom we have interacted at conferences and in our community; you are too numerous to mention but influenced our grantmaking in so many ways. Thank you!

Visit <https://cedarmerefoundation.org> to download this publication and for additional information on community partners and grants awarded through December 2024.

Front Cover Photos

Top Row Left to Right: JustLead Washington, Byrd Barr Place, Communities Rise, BIPOC ED Coalition of WA

Bottom Row Left to Right: Front and Centered, RVC, Na'ah Illahee Fund, Latino Community Fund of Washington

Back Cover Photos

Top Row Left to Right: Front and Centered, RVC, Byrd Barr Place, BIPOC ED Coalition of WA

Bottom Row Left to Right: JustLead Washington, Na'ah Illahee Fund, Communities Rise, Latino Community Fund of Washington



Learning

Equity

Community