

RUSSELL FAMILY FOUNDATION

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SUMMARY

In 1999, George and Jane Russell sold the Frank Russell Company, a global investment advisory firm based in Tacoma, Washington, to Northwestern Mutual, the Fortune 500 insurance business. With that liquidity event, the Russells converted what had once been the company's corporate foundation into a full-fledged family philanthropy. The Russells saw the Russell Family Foundation as a way for their extended family to make a quiet, positive impact in the community. With assets of nearly \$150 million, the Foundation sponsors three grantmaking programs, each targeting a different geographical area and theme: the George F. Russell, Jr. Fund works globally on peace and security issues; the Environmental Sustainability program focuses regionally in western Washington on environmental education and green business; and Jane's Fund supports local grassroots leadership and selected nonprofit organizations in Pierce County. It is Jane's Fund, established to honor the memory of Jane T. Russell, Foundation co-founder, which demonstrates The Russell Family Foundation's qualities of embedded philanthropy.

HOW AND WHY DID THE FOUNDATION EMBED ITSELF IN THIS PARTICULAR NEIGHBORHOOD?

The Frank Russell Company (now called the Russell Investment Group) remains headquartered in Tacoma, the county seat for Pierce County. The Russells lived in the area and had a long history of engagement in civic and philanthropic activities. As a result, when they created the Foundation, it made sense to continue that tradition of local giving. The Foundation is a nonprofit guest in a stunning waterfront facility that was built privately by the Russells and operates as a "green" building, reflecting the family's longstanding commitment to environmental sustainability. Its rooftop garden and plaza overlooking the harbor are open to the public.

The centerpiece of Jane's Fund is Jane's Fellowship Program (JFP) whose purpose is to support grassroots leaders who are active community stewards working to improve the quality of life in Pierce County. JFP is designed to recruit a group of grassroots leaders every two years and provide them with a 24-month fellowship opportunity that combines one-on-one coaching, skills training, monthly convenings, individual and group projects, and active alumni engagement. The

Fellows receive an annual financial stipend totaling \$10,000, access to personal development funds, and an opportunity to apply for individual community project funds.

WHAT BELIEFS AND THEORIES OF CHANGE INFORM THE FOUNDATION'S WORK?

Jane's Fellowship Program aims to provide grassroots leaders with the skills, confidence and inspiration to serve as effective change and empowerment agents in their communities. The long-term impact the Foundation hopes to achieve is a stronger and more visible grassroots leadership network in Pierce County. Network members would be diverse, representative of their communities, and effective in mobilizing community resources. Their voices would be recognized and respected by public-policy decision makers and would ultimately contribute to improved community conditions.

The Foundation points to barriers that grassroots leaders typically confront: a lack of sufficient resources, training, and development opportunities; isolation; and being under-valued by traditional power structures. Further, grassroots leaders often feel that they need to do everything themselves, missing the more powerful opportunity to build other leaders. As a result, grassroots leadership is not as effective as it might be, and the community does not get maximum benefit from leaders' change efforts. The Fellowship Program aims to address these barriers by building Fellows' skills and self-confidence and increasing their connections with each other and with broader community networks. In contrast to the isolation that typically causes high burn-out among grassroots leaders, JFP seeks to sustain the Fellows through their connections to each other, the respect they receive from team members and policy makers in the community, and the future Fellows whom they help recruit.

Short-term measures of success for JFP involve improved skills and connections. In the longer run as the Fellows continue their work in the community, the Foundation will look for additional indicators of success. Examples could include the extent to which Fellows continue to be engaged in leadership in the community, deepening their work or taking on new projects; power structures that show increased respect for grassroots leaders as reflected in the Fellows being quoted in the media or being elected or appointed to leadership positions beyond their original constituency; and the number of new leaders with whom Fellows have worked to develop their team-building skills. Another measure of JFP's success would be the existence of a vibrant, mutually supportive alumni network through which Fellows would continue to get support and stay connected with JFP.

Jane's Fellowship Program aims to help participants see the world they operate in through a different lens, changing their perceptions of themselves and their communities. The theory is that this new perception can be transformative and shift pessimism to hope, the status quo to an

entrepreneurial stance toward change, insecurity to confidence, the “victim plagued by self-pity” to the “independent problem solver.” Through working in supportive teams and engaging in action learning, the leader moves from “I can do this myself” to “I’ll organize others to lead the charge.” In JFP’s theory, these changes constitute powerful building blocks for long-term community change.

JFP’s philosophy is not to spend too much time on things that one cannot control but focus instead on how best to use the resources that are within reach. Working as teams is the preferred mode, empowering constituencies for self-help rather than building new organizations that frequently have their own self-maintenance needs.

WHAT STRATEGIES HAS THE FOUNDATION USED?

JFP’s key strategies are to:

- ❑ Facilitate Fellows’ awareness about, and confidence in, their own leadership styles and the styles of others
- ❑ Strengthen skills in communication and team building
- ❑ Enrich Fellows’ social capital through networking with each other and the larger community
- ❑ Support Fellows as they apply their skills to building teams with each other and in their own communities
- ❑ Support Fellows to maintain connection with each other and with the program as alumni
- ❑ Publicize the work of grassroots leaders

For the first year of the Program, Fellows meet twice a month in “learning dialogues” that focus on identifying leadership styles and becoming comfortable with one’s own style, building trust, and developing communications and team-building skills. Fellows take on a group project as a means to apply and strengthen their skills. During their second year, Fellows continue their own projects, building teams in their communities, but also undertaking a significant group project. The hope is that after the formal conclusion of JFP, Fellows will help to identify, recruit, and mentor new Fellows while staying connected with their original cohort.

The approach emphasizes learning by doing within a group context. Resources are available to make visits within the area and around the country, with the only restriction being that the Fellows visit in teams of at least two persons and that they come back to the group and share what they learned. Planning, doing, and reviewing is the method for much of the Fellowship—practicing in group projects and in the Fellow’s own community work.

WHAT INTERNAL PRACTICES, STRUCTURES, AND POLICIES HAS THE FOUNDATION DEVELOPED TO SUPPORT THE WORK?

Jane's Fellowship Program is supported by the broader values and culture of the Russell Family Foundation, which views its purpose as: contributing to innovative community impact; building quality relationships with partners; and having an outstanding work culture. Jane Russell's leadership was understated, humble and quiet, a style that is mirrored in the Foundation's strong core values of integrity, mutual respect and lifelong learning. One indicator of the degree to which the Foundation operates in close alignment with its values is reflected in Washington CEO Magazine's 2006 recognition of The Russell Family Foundation as the #1 nonprofit workplace in Washington State.

The Foundation's culture encourages staff to take risks, make mistakes, and learn from them. In fact, it is the Foundation's Learning Director who directs Jane's Fellowship Program. He spends about half of his time on JFP, planning and facilitating the learning dialogues, meeting with Fellows individually, and helping connect them to their peers and other resources. In the same way that JFP emphasizes the value of a team-based approach, the Learning Director engages other staff in the Foundation in all aspects of the work.

WHAT CHANGES IN THE COMMUNITY DOES THE FOUNDATION POINT TO AS SIGNIFICANT?

The Fellowship's inaugural class graduated in the summer of 2006 so it is early to point to community changes that have resulted from the Program. However, besides the obvious growth that has accrued to each of the six graduates, Foundation staff make the case that the results of their being able to work better and smarter are already apparent in the community. For example, a participant who worked as a volunteer to put on safe drug- and alcohol-free events for youth has trained youth leaders to take on this role and has moved on to other community activities. Another who developed a hip-hop education program as a drug-prevention strategy for elementary-school youth has begun to be invited by principals and teachers to deliver that program in schools.

Even though they only started in the summer of 2006, the ten members of the second class of Fellows also point to changes in the way they approach their work in the community, the ways in which they support and learn from each other, and the positive results that have been achieved. These Fellows are involved in a diverse range of community issues such as basketball for at-risk youth, the lack of services for low-income rural families, and financial literacy.

The Russell Family Foundation is working with an evaluation firm, See Change, to design an approach that would identify the key outcomes to track and the best, least obtrusive method to collect such data. The Foundation would also like to understand how best to measure the progress of the Fellowship Program as a learning organization.

WHAT WERE THE BIGGEST CHALLENGES? HOW DID THE FOUNDATION CONFRONT THEM?

Because the connections among Fellows are so important to the approach, one of the initial challenges was helping to get everyone hooked up by phone and email so they could communicate with each other on an ongoing basis. Creating a learning environment characterized by trust and candid dialogue also took time and effort.

Managing expectations between the Fellows and the Foundation, especially with regards to grant funding, is another challenge. The Fellowship is designed around individual capacity-building and therefore does not stress program development except as a vehicle for critical learning. The goal is to build more confident, competent, and connected people who will be able to navigate more successfully in a variety of situations, including being more competent fundraisers. The critical task is to build Fellows' capacity to develop clear goals and a strategy and action plan to reach those goals. Thus, the Fellowship focuses on helping grassroots leaders—not specific programs or organizations—to adapt to and sustain themselves in continually changing environments. Foundation staff reinforce this point as they consider Fellows' requests for program funds.

INTERVIEWEES

Richard Woo, CEO, The Russell Family Foundation

Henry Izumizaki, Learning Director, The Russell Family Foundation

Phyllis Gill, Member of the Board, The Russell Family Foundation

Linsey Sauer, Administrative Professional, The Russell Family Foundation

Bashiir Abdul-Mu'min, JFP Fellow

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