

EMBEDDED PHILANTHROPY PROFILE

From “Moving Forward While Staying in Place: Embedded Funders and Community Change”
(Chapin Hall Discussion Paper, 2004)

COOK FAMILY FOUNDATION

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SUMMARY

In 1998, the Cook Family Foundation decided to make the improvement of Shiawassee County the primary focus of its activities. Through active, personal engagement with numerous community institutions, the trustees identify and develop opportunities for Foundation engagement. Their commitment to Shiawassee County has no established end or review point. They grant about \$500,000 annually, primarily in the areas of education, economic development, environment, and physical and cultural community-building.

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

A deep sense of connection to their community led the Cook family to focus on Shiawassee County. Don and Florence-Etta Cook started the Foundation in 1978. Until Mr. Cook’s death in 1998, the Foundation focused on supporting a few key community institutions and on expanding access to the University of Michigan for the best students from Shiawassee County and elsewhere. His bequest quintupled the Foundation’s assets to \$10 million and sparked a discussion among the six family-member trustees about how to fill the strategic and operational void left by his passing. Through deliberations, including a two-day strategic planning session, the trustees decided on a geographic focus on Shiawassee County.

The trustees brought a diverse set of interests and community commitments to these deliberations. Many had served as trustees or volunteers with organizations in the community, including the YMCA, the school board, the Arts Council, the local hospital, and the Chamber of Commerce. This geographic focus allowed them to reconcile each of their “individual points of attachment to the community” and “leverage their personal involvement.” They knew their profound local knowledge and extensive personal networks would help them evaluate opportunities before, during, and after the Foundation invested time and money.



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

Shiawassee County faces serious economic and social challenges, including the low incomes and low educational attainment of a significant portion of the population, created in part by deindustrialization and the migration of many Shiawassee County natives in pursuit of opportunities elsewhere. The Foundation seeks to expand educational, economic, and social opportunities in Shiawassee County and to elevate individual and community aspirations. This focus is expected to improve the community’s vibrancy and residents’ quality of life. Increasing the community’s social capital is a key part of this effort.

The Foundation aims to support healthy organizations in diverse sectors that share its goals and strategies. It often provides money for organizations to expand their work into new, neglected areas, and couples this front-end approach with a concern about sustainability. As a result, Cook works with partners to develop plans to become independent of the Foundation’s financial support. The Foundation also looks for opportunities to leverage its dollars by using them as the local match against larger investments by external public and private entities.

WHAT STRATEGIES HAS THE FOUNDATION USED?

Family members’ deep community involvement guides the Foundation’s work. Through constant, multilayered communication with people in various parts of the community, trustees learn about how best to invest their time, energy, and money into moving a community-building agenda forward.

As a body, the Foundation’s board occupies a uniquely fertile position in the community at the intersection of many personal and organizational networks, free from most political and bureaucratic constraints, and endowed with substantial human and financial resources. Cook tries to use these assets to provide vision and leadership, inspire cooperation among players in the community, and create legitimacy for fledgling efforts. In keeping with their belief in the critical need for strong organizational partners, they have a standing offer of grants and consultation to community organizations interested in focusing on strategic planning.

The expansion of educational opportunities for Shiawassee County residents, from early childhood through college, constitutes a cornerstone of Cook’s work. They support a wide range of programs for both children at risk and those demonstrating excellence. These programs include individual scholarships, out-of-school opportunities, counseling, mini-grants for teachers, newsletters for parents, support for the local community college, and polls of citizen attitudes

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toward the public school system to help steer policy. Further, support for arts and music programs, the YMCA, and other programs mentioned above brings the Foundation’s desire to expand educational and cultural opportunities for residents together with its desire to build social capital.

Cook’s educational programming provides an example of the Foundation’s role in nurturing new initiatives and attracting new dollars. Seeing a need, they funded the first-year salary of a career and college counselor at the Owosso high school to help youth develop and reach goals. After the first year, once the value of the counselor was demonstrated, the school board found money in its budget for the position. In another case, the Foundation’s \$30,000 investment per year in local dollars leveraged \$700,000 in public funds for early childhood and preschool education.

Because a healthy community depends on a healthy economy and Shiawassee County faces real economic challenges, the Cook Foundation has supported initiatives to improve the county’s economy as well. As a partner with the Shiawassee Chamber of Commerce, the Foundation has supported the creation of an office responsible for recruiting and retaining businesses and for the development of individual training to promote successful entrepreneurship, workforce participation, and nonprofit management.

Through grants and personal involvement, Foundation leaders have also supported several projects aimed at improving the physical infrastructure of the community. These include support for parks, playgrounds, a nature preserve, and river cleanup.

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

The Cook Foundation’s work depends on the high degree of trustee engagement in other aspects of community life. One level of this involvement is that trustees and their families live in the community, attend public schools, shop in local stores, etc. Another level is that they are active in community affairs and as community leaders, serving on many boards and committees. When the six trustees meet, they bring together a wealth of knowledge about the community that allows them to identify opportunities on the front end, monitor and judge partnerships over time, and evaluate partnerships in retrospect.

Most foundation investments are in programs developed jointly by the Foundation and its community partners. When trustees find capable leadership and functional institutions, they enter into dialogue about the existing work of the organization, ideas for new work consistent

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with the organization’s core mission, and how the Foundation and its trustees might help the organization. Grant proposals are developed through this dialogue. In a few instances, the Foundation has supported programs developed independently, such as applications for organizational strategic planning and teacher mini-grants.

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

The Foundation’s involvement and support has been essential to the success of many valuable programs and institutions in the community. Although the trustees have not reached all their goals, they have made significant progress in expanding educational, cultural, and economic opportunities for Shiawasee County children, youth, and adults and strengthened the institutions that contribute to a stronger, healthier community life. Grantees and observers report that, through personal and financial support, the Cook family helps generate a “spirit of can-do in the community” and serves as one of Shiawasee County’s most important “instigators of change.”

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

Large social forces. Developing successful strategies for improving the community in the face of large social forces is a constant challenge. Pressure on the county’s traditional economic engines of agriculture and manufacturing makes it difficult to ensure that residents, especially talented, educated youth, have attractive economic opportunities in the County. This pressure also undermines support for civic institutions by eroding the community’s base of available financial and personal resources.

Inspiring higher expectations. Progress toward many of the Cook Foundation’s goals requires inspiring higher expectations among residents. Many people resign themselves to present conditions, which inhibits their willingness to support reforms in public institutions and communal affairs. Through leadership, dialogue, and support for active individuals and institutions, the Foundation tries to raise residents’ expectations for the community and for themselves.

Capacity building. Finding and nurturing organizational and individual capacity is the main work of the Foundation. Foundation leaders appreciate the many assets their partners and others in the community contribute. However, they always wish the pool were larger and always work to expand this pool.

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Attracting outside support. Foundation leaders have been frustrated with national foundations’ and federal and state governments’ lack of interest in issues facing this rural community. They feel urban communities benefit from disproportionately more opportunities for support.

Impact on personal lives. Trustees talked about how the family’s “community visibility” through the Foundation can negatively affect other parts of their and their children’s lives. For instance, they talked about the tension that can arise when a Foundation representative runs into grant applicants at the grocery store. They try to keep the “Cook” name off of initiatives and direct attention to the community instead. For instance, they preferred to name a program for high-achieving high school students “Shiawassee Scholars” instead of “Cook Scholars.”

Community voice. The Foundation tries to be aware of and to address its blind spots with regard to the needs, assets, and opportunities in the community. Because the trustees operate so heavily through personal engagement and because their time is limited, there are some parts of the community about which they are less informed. To respond to this challenge, they have invited community members to attend some board meetings and are working to put together more formal opportunities for structured discussion with a broad cross-section of people from the community.

INTERVIEWEES

Tom Cook, Trustee and Executive Director, Cook Family Foundation

Laurie Cook, Trustee, Cook Family Foundation

Philip Hathaway, Community Development Director, City of Owosso

Donald Trap, Assistant Superintendent for Special Education, Shiawassee Regional
Education Service District

Carol Vaughn, Executive Director, Shiawassee Regional Chamber of Commerce