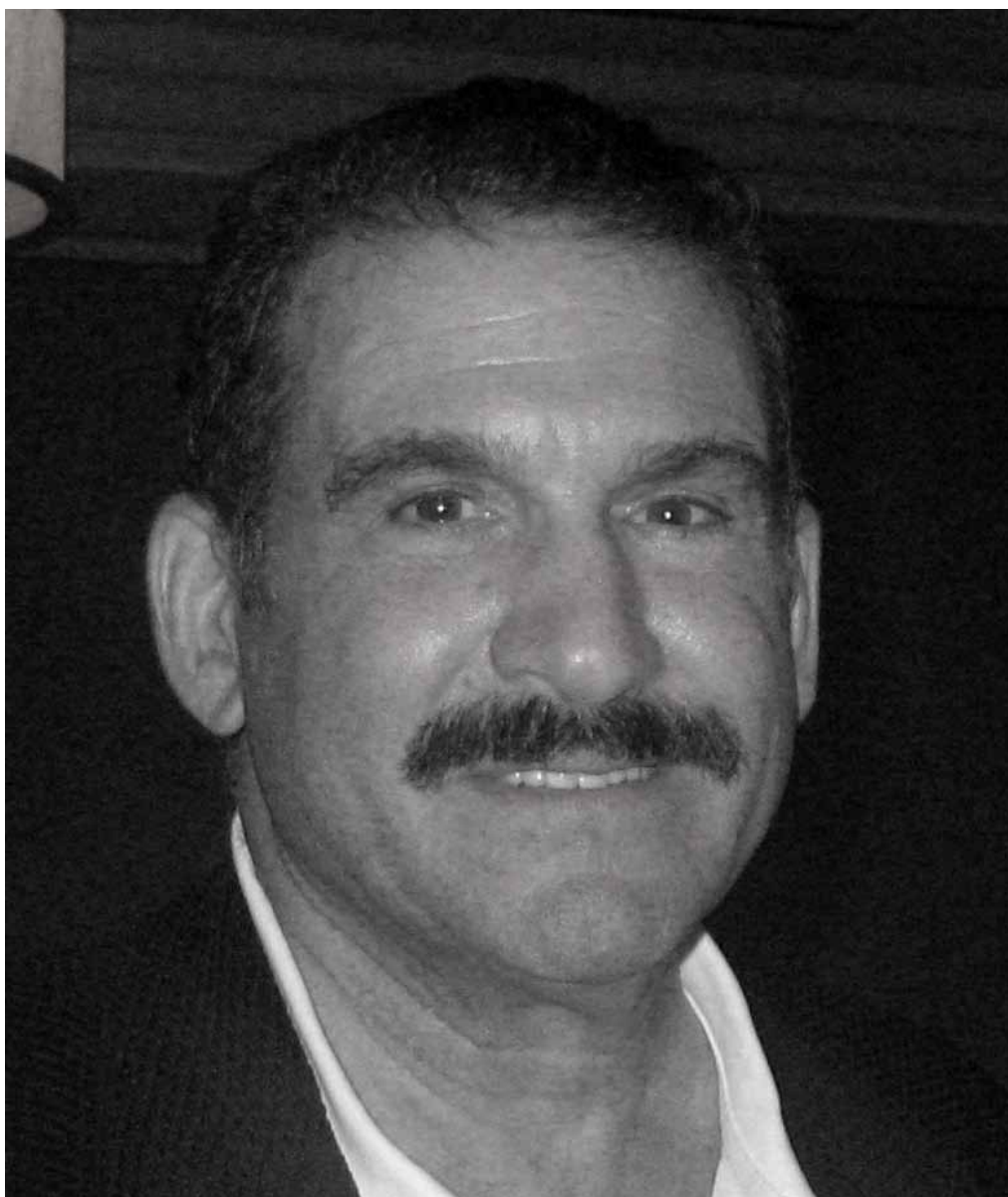




CONCINNITY



Steve "Kelly" Kelban

A Friend, Mentor and Guide Makes a Transition

By Jennifer Kasoff

An era comes to a close with the departure of Steve "Kelly" Kelban from the Andrus Family Fund. In September 2012, Concinnity spoke to Kelly about his memories of and reflections on working at AFF. Kelly left AFF on October 15, after nearly thirteen years at its helm.

What drew you to this position?

A compelling opportunity. I was on sabbatical in Italy with my wife. But when a headhunter, Ed Hamilton, called and I had the chance to meet him and hear about the challenge, I was hooked. It was a no-brainer to cut short the sabbatical. I have been lucky to have such a varied and satisfying career in public service, but I had never led a start-up. Creating a foundation with the chance to develop programs, people and structures - that was definitely worth coming home early.

Talk a little about the early origins of AFF and the integration of the Transitions Framework.

I began this new role in January 2000. In March 2000, we had our first board meeting - a retreat in Princeton, NJ. We accomplished a lot at that meeting, including helping these eight younger family members get to know each other. One way we did that was to ask each board member to speak about his or her passions, to say what really mattered to that person. It turned out that there was more overlap than we had imagined. For the next few months, I interviewed 50 experts in the clusters of passions that had been identified. I brought four program possibilities to the board. The board considered these areas and ultimately emerged with Community Reconciliation and Foster Care to Independence as two areas that spoke to

the passions of multiple board members and also seemed to offer opportunities to make a difference and to learn.

At the second board meeting, I introduced the Transitions Framework (TF) to the board. When I first got the job, my wife, Ellen, gave me a book by William Bridges about Transition. As I read Bridges' book, it occurred to me that although he was writing about change in the corporate sector, the ideas and frameworks were also relevant to organizations working on social change.

AFF Program Officer, Masiel Rodriguez-Vars, called Mr. Bridges, and she and I flew out to see him in Northern California, along with Ann Williams, an AFF board member at the time. We had an amazing conversation. By the time

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FROM THE CHAIRS

From The Surdna Chair



Josie Lowman

By Josie Lowman

Like AFF, Surdna has been dealing with many transitions. Surdna is experiencing a complete strategic overhaul of all three of its programs: Sustainable Environments, Strong Local Economies, and Thriving Cultures. As you may

recall, the three programs were revised after Surdna adopted its new mission statement three years ago. The programs all have new leadership in the last two years; Shawn Escoffery, Strong Local Economies; Michelle Knapik, Sustainable Environments; and Judilee Reed, Thriving Cultures. With the new program leadership in place, each program has been focused on setting out the strategy for each program and determining what kind of work each program will concentrate on. This work has been very difficult but rewarding for both the Board and the staff. We can finally see the light at the end of the tunnel!

We have also welcomed three very talented new board members, and said goodbye to some very talented and special people. The

new board members are Gwen Walden, Judy Belk, and your Andrus cousin, Carra Cote-Ackah, who join us with a wealth of experience in the philanthropic field. With Carra's election to the Board, of the 10 family Board members, six are fifth-generation cousins and four are fourth-generation cousins, thus fulfilling one of the original unwritten goals of the family program.

Surdna is now at a place where both the Board and the staff can concentrate on moving forward and doing our work. While the journey to get to where we are now has been exciting and a great learning experience from the Board standpoint, I know that we are all very happy to be moving forward so well.

From The FIC Chairs



Kelly Nowlin and Edie Thorpe

By Kelly Nowlin and Edie Thorpe

I, Kelly, served on the original board of the Andrus Family Fund when it began in 2000. We adopted this theory of Transitions that has been referenced many times throughout the years. There are some who might think the Transitions theory is a little "wonky" (to use a term from one of my favorite Program Directors at Surdna). But I'm here to tell you that once you understand it, you realize it applies to all aspects of life and lends a perspective to help you navigate those bumpy roads.

There has been a lot of change happening at Surdna and AFF. Change that is "bumpy" to navigate and that has created so many different transitions for people affected. At AFF, Steven "Kelly" Kelban left the fund this October, after having served as the Executive Director for more than 12 years. This is like hitting a Boston pothole on the bumpy road as far as transitions go. In order to traverse this one, it seemed only fitting to reflect on our family program and Kelly's tenure as its leader. Who better to reflect a bit, but Edie, who was a visionary in developing this program:

Going back a few years...

As the Family Involvement Committee developed plans for the Andrus Family Philanthropy Program in 1998 and 1999, we four (Peter Benedict Sr., Larry Griffith, Sam Thorpe, and I) realized early on that finding the individual to staff this new entity was of profound importance. The possible scope of this new Program called for a multi-talented person – one with professionalism, creativity, flexibility, a variety of interests, personal warmth and, ideally, a person with mentoring experience and good communications ideas and skills.

Alongside consultant Judy Healey, and Surdna Executive Director Ed Skloot, we worked with

a national search firm to find that person. After many interviews with a wide variety of people, the Committee was unanimous in its selection of Steve Kelban as the AFPP's first Executive Director. Particularly appealing to us were both his experience mentoring recipients of NYU's Root Tilden Scholarship Program and his legal education and training, which came in handy as the Program navigated some of the legalities of a non-profit program designed for a specific family.

For more than twelve years, I worked closely with Kelly. It was a joy to have a professional relationship with such a talented person and to watch him work with the Board in the development and cultivation of the Andrus Family Fund, as well as creating other effective programs such as the Andrus Youth Service Program (AYSP) and the Board Experiential Training program (BETs). Our newsletter, Concinnity, is a model of family philanthropic communication. Further, both staff and board members have presented at national conferences as other families look for ways to bring succeeding generations into their family's philanthropic work. All of this is due to the creative work of Kelly and his staff, the oversight of the FIC, and the ongoing strong support of the Surdna Foundation.

And now, both Kelly Kelban and I are moving on. Transitioning to new phases in our lives. After all, that was the original goal of the family program – to train and educate our younger generations!

While I, too, could spend pages reflecting on my experience working with Kelly, sharing all he taught me and how I grew as a board member and as a person because of him, I've taken it upon myself to think about the part of this transition referred to as the "unknown." It's the point in time where no one knows what to expect or which direction the Fund will take

once Kelly has said his final goodbyes. This is the time most people dread when faced with a change. It is also the time where new ideas and creativity can be discovered. Through all the change I've been through in my own life, I have become more skilled at embracing the unknown part and just living in the chaos for a while. I've come to trust the process of Transitions more and to understand that each individual experiences a transition at different speeds. Some have a harder time letting go, some plow through to the new beginning so fast that they might not be as ready as they think.

Kelly's departure is one of the harder ones to accept. He has a gift as a leader, a mentor, a risk-taker, a bridge-builder, and a true friend. He has made an impact in Foster Care and Community Reconciliation work that will live on long past his time as Executive Director. As he embarks on this new phase in his life, I'm so happy for him and so selfishly sad to see him go. I know AFF will continue to be brilliant. I know Kelly will continue to make an impact in the world and be happy. And I know the Transitions Theory helps me to continue to move forward because it is real. It allows me to go at the pace I need on this bumpy road and truly honor my special friend.

Thank you, Kelly K.

BETs UPDATE

BETs IV Makes Social Change Grants



Naomi Wright



Caitlin Earley

By Naomi Wright and Caitlin Earley

This past year, we had the opportunity to come together with some of our cousins to participate in the AFF Board Experiential Training program (BETs). Along with cousins Sophie Voorhees, Molly Thorpe, Samantha Spensley, and Autumn Thorpe, we first met at the AFF offices in New York in January.

We were met warmly by our facilitator, Alyson Wise, our transitions coach, Masiel Rodriguez-Vars, Kelly Nowlin, Steve Kelban, and Ingrid Halloway. Frank Hartman also assisted us by phone during our time in New York and conference calls later on. Their combined wisdom, experience, and guidance was priceless as we pushed forward into deciding our goals for this junior board and how we wanted to shape our contribution to AFF's work.

After three days in New York, the six participants returned to their corners of the country, but we stayed in contact via phone and Skype with the goal of learning and completing the process of awarding a grant. To give you an update on what the BETs IV group learned and achieved, we had a conversation reflecting on our experience.

Naomi: Can you describe what we did during the training in New York?

Caitlin: Using materials Ingrid sent to us before meeting, we reviewed past BETs work, including how they shaped their request for proposals and the organizations they submitted to be funded. We were able to narrow down what our group was looking for in groups to find. We discovered we all wanted to focus on youth-led initiatives as that concept touched each of us in different ways. After much collaboration between all the cousins and careful guidance and support by the team in NYC, we came up with our Request for Proposal that was to be sent out to the potential grantees. It was quite exciting work to get it all done in just one weekend!

Naomi: What was it like to meet five new cousins and work with them?

Caitlin: My first thought was, "what an incredible group of women!" Here we are, all related one way or another, most of us having never met before, and we were in one of the brightest cities in the U.S. to further our family's philanthropic work. To put it in younger generation terms: "How cool is that!" Having worked on a BETs board previously I've had the experience before, but this group of ladies brought something brand new to the table and it was a sight to see. We balanced each other out well, some wanting to talk more, others less, and found common ground in our time together. It was an incredibly rewarding experience.

Caitlin: Were you familiar with the Transitions Framework before the workshop in New York? What did you learn and/or take away?

Naomi: To be honest, I hadn't heard of the Transitions Framework at all. But the ideas immediately resonated with me. Personally, I was halfway through my freshman year at college after a gap year in West Africa. I was in the midst of many endings, neutral zones, and new beginnings. I was surprised to learn that all of the other BETs IV participants were also experiencing transitions. That is the beauty of this framework, that individuals, and even groups, universally experience Transitions. I also learned how applicable these ideas would be to our work with BETs, from interacting with the other team members to better understanding the perspective of representatives from organizations proposing grants.

Caitlin: Will you give us an outline of what the BETs group did after their time in New York?

Naomi: We finalized our Request for Proposal and sent it to current AFF grant recipients. After receiving twenty proposals, we began an initial evaluation process based on a list of criteria brainstormed during our time in NYC. This was a difficult process because all of the proposals were exciting and passionate requests that would enable these organizations to move toward achievement of their goals.

Naomi: During the final stage, we each had the opportunity to speak with a representative from the organizations in the final running. What did you learn from your interaction?

Caitlin: When you're working with an organization solely on paper, you can get enthusiastic about a project, but you're still missing out on the soul of it. We got to contact the organizations still in the running toward the end of our project. After those conversations, you could tell we were all affected by the leaders to whom we spoke. Some of us had passionate directors who brought their idea leaping off the paper and into full color while others had directors that didn't do their project justice. Ultimately it was the combined work of several months and then these few phone calls that really helped us make our decisions. When a director has so much passion for what they do, it's hard not to get excited at what you have the chance to support. After six months, and many long conference calls, we've narrowed down our pool of grant proposals to three, which we have recommended for funding by the Andrus Family Fund Board. I think we speak for the whole BETs IV group when we express our gratitude at having the opportunity to gain such valuable experience in grantmaking and to feel the excitement and gratification of helping to promote positive social change.



2012 BETs Team
Front row: Samantha Spensley, Molly Thorpe, Naomi Wright
Back row: Autumn Thorpe, Sophie Voorhees, Caitlin Earley, Alyson Wise (facilitator)

AYSPers Uniformly Support Fellow Youth

By Masiel Rodriguez-Vars

We have always counseled our AYSPer to make grants in areas that truly matter to them, and that has always resulted in grants that serve a range of people (and, often, animals!) This year's cohort celebrated a first. Each of them, independently, chose to support organizations serving teens.



Jack Jasper

For the past three years, Jack has supported programs aimed at giving people second chances. Whether it was through the Union Gospel Mission serving the homeless or through the Teen Challenge anti-addiction program, Jack has always been drawn to organizations that help people who are facing tough challenges get back on their feet.



Jack Jasper's Site Visit to Urban Ventures in Minneapolis, MN

This year, Jack focused on a program that helps youth struggling with poverty. He chose to nominate an organization called Urban Ventures, which is based in South Minneapolis. Jack's thoughtful explanation for why he chose this organization reveals some sophisticated grantmaking. He appreciated Urban Venture's comprehensive approach to tackling poverty, which addresses parental, academic, and spiritual poverty. Jack recognized that it is not enough to target the symptoms of poverty. Organizations confronting the underlying factors will have more lasting impact. Great thinking, Jack!



Sam Abernethy

As a first-year AYSPer, Sam wasted no time in zeroing in on his passion – helping homeless youth. After conducting some research, he found an organization right around the corner.

Literally. The Phoenix Youth Programs, located less than a block from Sam's home, serves at-risk and homeless youth.

Sam was impressed by the wide range of services that Phoenix offers young people. Like his cousin Jack, Sam quickly picked up on Phoenix's holistic approach to addressing youth homelessness. He appreciated that the organization does not solely focus on youth once they are homeless, but also provides preventive services in the form of a drop-in center, counseling for youth and families, community education, and referrals to other programs.



Isabel Griffith

Isabel continues to explore her range of philanthropic and community service passions. Her work as an intern for a Spanish-language documentary film class in Costa Rica this summer fueled her interest in supporting programs that serve the underprivileged in Latin America. Isabel also took her passion for running with her to Costa Rica. She collected and donated 80 pairs of running shoes to an organization that is helping Costa Ricans, especially young women, become runners.

Her interest in increasing fitness opportunities for young women led her to an organization called Girls on the Run. The organization, which now serves girls around the world, creatively uses running as a vehicle for empowering young women. Not only was Isabel drawn to the organization because of her own love for running and the positive impact that it has had on her life, but she was impressed by the 10-week curriculum that teaches girls about their inner strength and power to change the world. She was especially excited about the organization's push to reach girls that might not otherwise have access to organized sports. Sounds like Isabel found an organization that perfectly represents her many passions!



Isabel Griffith's Site Visit to Girls On The Run, Central Maryland



Vincent de Venoge

In his second year of AYSPer, Vincent is quickly developing his grantmaking knowledge and skill. He came home from his three site visits excited to tell his dad about the significance of an organization's 501c3 status and explaining the intricacies of L3Cs. (As the Surdna CFO, Vincent's dad, Marc, could not be more pleased.) What is more impressive than the nonprofit lingo that Vincent is picking up through AYSPer is his desire (and instinct) to develop funding partners to increase support for an organization.



DeVenoge's Site Visit to Spectrum Designs Foundation, Port Washington, NY

He visited three organizations in his community that exposed him to different areas of need in his hometown, including educational inequities, people struggling with poverty, and developmentally challenged teens. He was most impacted by his visit to the Nicholas Center for Autism, where he met several youth afflicted with autism and other developmental challenges.

Vincent learned that youth with special needs receive very few job training opportunities which makes it extremely difficult for them to become self sufficient. His research led him to Spectrum Designs, a nonprofit business that trains and employs developmentally challenged youth to create custom-decorated apparel. Youth employees at Spectrum are involved in all aspects of production and receive invaluable job training and mentorship.

Vincent was so impressed with the organization that he came up with two additional ways to support them. He suggested to his basketball teammates that Spectrum design the t-shirts for their annual student-teacher fundraising game. Additionally, he nominated Spectrum as the charity to receive the funds raised by the event. Vincent hopes to volunteer for the organization later this year.

This group of grantmakers can help us feel a little better about the future, knowing that these teens are looking out for their peers.

IN THE NEWS

Andrus Skidmore “Skid” Thorpe

(March 30, 1929 - February 15, 2012)



By Edie Thorpe

It hasn't been the custom in this newsletter to honor family members who have passed away, but an exception needs to be made here and now!

Andrus Skidmore “Skid” Thorpe, who died on February 15, 2012, was the first born in the fourth generation of our Andrus family – on March 30, 1929. Born during a tumultuous time in our nation's history, he carried values learned from being a Depression baby throughout his life. Indeed, his children and I could cite many humorous examples of his tightness! Indeed, it was in the DNA inherited from his great-grandfather John Emory Andrus – his values of thrift, modesty and careful stewardship of his resources. And while he was a good steward in many ways, he was also generous to and thoughtful to his children and grandchildren.

For more than 10 years, Skid willingly served this Andrus family, primarily as the chair of the Andrus Timber Management Committee,

skillfully guiding this new entity (formed in 1987) through various transitions until the timberlands were sold in August 1999. He gathered wise professionals around him, ran sometimes difficult meetings, and cared deeply about creating familial and financial harmony in order to make informed decisions on behalf of the timber beneficiaries. His stewardship and love for our family live on in those of us closest to him (after all, you remember that he married a certain other Andrus cousin). He battled multiple health issues from the 1980s on, always with a smile and an attitude that defied belief.

As a friend of his wrote me back in February, “...the dictionary defines fortitude as strength of mind that allows one to endure pain or adversity with courage. Add a constant good humor and that, to us, defines Skid. His loss touches us all.”

Truer words were never spoken.

DOERS

A Family Member's Internship at Surdna



Julia Earley

Julia Earley wrote this piece last year to reflect upon her one-month internship at Surdna.

My time at the Surdna Foundation has been a time of immense learning and exposure. I came knowing next to nothing about philanthropy and feel that through learning about how foundations operate, I have gained incredible perspective on how change can be and is made. It has also offered me the opportunity to grow personally through learning more about my own family.

Being at Surdna has opened my eyes to the complexity of the funding community and given me a rudimentary understanding of philanthropy's role in steering the non-profit sector. I have frequently had the sensation of zooming out, expanding my sphere of awareness to include a wider system: from the individual in the community to the grassroots organization to the funder to the affinity group of funders with common goals...

Having experience only with non-profit organizations working at a grassroots capacity,

I have adjusted my perspective greatly from the foundation vantage point. It has also been extremely inspiring to discover, through my chance to become briefly part of this world, the many high-level, intelligent professionals working in a very systematic way to create positive change.

I have been piecing together and adding to my existing knowledge, creating a bigger picture to understand how change can happen through a combination of advocacy, policy change, community development, and individual action. It makes sense to me that one strategy foundations use to maximize impact and potential for change is to support organizations with a national focus, or those that tackle larger issues.

Discovering some of the many inspiring organizations operating nationally has been a highlight of my time here. Through attending meetings/events for the Sustainable Environments program, and also through reading letters of enquiry from potential Thriving Cultures grantees, I have learned of some wonderful progressive change-makers. I have been on site visits to the Groundswell Community Mural Project, Downtown Community Television Centre, and the Young People's Chorus, and been impressed with the work being done by each.

I have learned of the intricacies of the grantor/grantee relationship, of the unavoidable power imbalance, but the potential for healthy, focused collaboration in working toward mutual goals. As a funder, Surdna is able to help build capacity of grantees – help them be better communicators, better assessors of

their own work – which in turn leads to more impactful and effective change.

Continuing to build my understanding of sustainability and the ways it can be integrated into our future, the Sustainable Environments program has shown me the interconnectedness of issues e.g. food systems with immigration, waste, economy, environment, health, domestic fair trade. It is evident that a holistic approach to sustainability is necessary to move forward, and it has been exciting to discover that there are a number of foundations focusing on this.

I have found extremely interesting the discussions currently happening at Surdna (and particularly with AFF) around demographics, racial equity, and white privilege. It is important for an organization aiming to serve disadvantaged communities and communities of color to be asking themselves the difficult questions around their own position and what that means for grantmaking. It has also prompted my own self-reflection, both as a family member of the Foundation and as an educated, middle-class, white female.

Becoming aware of my own life as a piece of my much broader family has also been a feature of my time at Surdna. I've come to realize that my personal values are aligned with, and in some ways a product of, my ancestors.

One of the most valuable things I will personally take away from this experience is the confirmation of my developing interest in working in social justice or environmental advocacy, and the exposure to the myriad ways that this is possible.

Kim Kaupe



Kim Kaupe, Co-Founder of 'ZinePak, with Justin Bieber

Fifth-generation cousin Kim Kaupe, a 2008 University of Florida graduate, is making her mark at the intersection of the music and magazine businesses in a big and brand-new way. In January 2011, Kim and her business partner, Brittany Hodak, started 'ZinePak, the originator of small-format fan packaging. Their product consists of exclusive editorial content, which includes never-before-seen artist photos and interviews, and a limited edition physical merchandise item (such as trading cards, tattoos or postcards). The small-format magazine is then bundled with a CD for sale at retail, on tour, or given out as a promotion. The goal of a 'ZinePak is to create captivating and engaging content and music for fans to experience.

Kim hailed from publishing powerhouse Conde Nast, and her business partner came from one of the major music labels, Sony Music. After leaving their respective industries, they met at an ad agency in October 2010. They came up with the idea for 'ZinePak in December 2010 and decided to take plunge, quit their jobs, and began to create their new company. The journey was, "Exciting and scary," says Kim, "but completely worth it." In July 2012, Concinnity spoke with Kim about her 18-month old company:

What was involved with starting 'ZinePak? Where can they be found?

We were lucky that, unlike most start ups, we didn't need a big investment to begin. Brittany and I work from home, and all we really need is our computers and phones. The next step was to find clients. After pitching the idea to Walmart, they bought into the vision and became 'ZinePak's first customer. With Walmart on board, we began to pitch record labels, artists, and bands on creating 'ZinePaks for their new albums, compilations, and for



Co-Founders of 'ZinePak, Kim Kaupe and Brittany Hodak with Scotty McCreery

their tours.

Most 'ZinePaks are sold at Walmart in the music section for a slight upcharge. The regular version of a CD, in a plastic jewel case, would be, let's say, \$10, whereas a 'ZinePak, which has the magazine and physical merchandise items, is packaged and sold for \$2 or \$3 more.

Are 'ZinePaks in a new market space or does your product fit into a set category?

No one had attempted this format before, which put us in a great space in terms of creating a niche product. Glorified CD booklets had existed, magazines had add-ons before this, but what sparked this for us was we looked at this as a way for teens to get a more enhanced tangible music experience. 'ZinePaks have also found advocates in the artists themselves. They work in tandem with us to create the package. For example, we take meetings with Justin Bieber to make sure the artwork is on point, craft all the interviews with him, and make sure the package is up to his standards as well as ours. We provide interviews with the artist and other new content that a fan can't find anywhere else.



'ZinePak in music display section of Walmart

What was it like when you quit your corporate, 9 to 5, job?

I thought I would vomit every night. I left a great job in the advertising world after only three months at the company. Half of my friends at the time couldn't even get jobs. People thought I was crazy, and I probably was a bit.

But Brittany and I thought about it and came up with, "If we don't do it now, will we regret it? How many times does Walmart say they will give a new company with no track record a shot?" I waited a few days to tell my parents as I knew they would panic. Now they tell everyone it was the best decision I ever made.

How has the company grown in your first 18 months?

We had two requirements in our mind for this business being a success: 1) we needed to make as much money, or more, than we did at our corporate jobs and 2) to have fun. We met both requirements in the first year. We did six projects in the first year and it caught on like wildfire. As of July 2012, we had done ten projects already. Our business has grown by over 200% so far and the year is only half way done!

To date, we have more than 500,000 units in circulation and have done \$6 million in retail sales in 18 months at Walmart.

We have worked with all four major music labels and released projects with The Beach Boys, Justin Bieber, Selena Gomez, American Idol winner Scotty McCreery, the popular kids franchise Kidz Bop, and Rascal Flatts.

What surprises have you experienced as two young women starting a successful business?

I'm 26, and my partner is 28. We have a couple funny stories about how we finish a meeting and the other person says we'd like to meet with your bosses. People mistake us for assistants all the time.

After a very big early success with a 'ZinePak in Walmart, the sponsor of the project wanted to meet with us face to face because of how well it had done. We flew to the major beverage company's office and gave our presentation to a room full of big wigs, all much older than we were. One of the older men in the room stopped us and said, "I want to know whose dad works at Walmart and how you managed to get this done?" The rest of the people in the room were horrified and made many apologies to us once the meeting was complete. While we are able to laugh it off, it is fun to see how surprised people are that two young women have created such a successful company.



Kim and Brittany with The Beach Boys

What have been some high points?

We set a goal in 2012 that we were going to do a Justin Bieber 'ZinePak. Not only did we achieve it, but we surpassed it. The label loved the product so much they picked up the option to distribute it internationally. The 'ZinePak was printed in 13 different languages and was worldwide.

Now that our company has made a name for itself, record companies are starting to come to us—a far cry from stalking down executives all of 2011! A lot of times they will see a project with another artist and think, "My artist is just as popular as this person. Why don't I have one of these cool things?"

Depending on the artist and what the 'ZinePak will be used for, we print between 20,000-100,000 copies. Presently, the only retailer we have partnered with is Walmart, but we have worked with artist tours as well as fashion labels.

What is one piece of advice you would give to new business owners?

Ask for forgiveness, not permission.

WHAT'S HAPPENING AT...

What's Happening at AFF?



Thomas Kelly



Hans Miller

By Thomas Kelly and Hans Miller

Our September board meeting marked another important transition at AFF. For more than 12 years, Steve Kelban, or "Kelly" as he is known to many of us, has led the Andrus Family Fund (AFF) and the Andrus Family Philanthropy Program in the innovative work we've been doing. Kelly is now moving on to join his wife on sabbatical and then ease into an exciting time in his life...retirement. The September board meeting was our last with him at the helm.

On the Saturday evening of our board meeting, we held a very special tribute dinner for Kelly. It was a memorable night with a room full of people representing AFF's extended family. In attendance were Kelly's wife, Ellen Schall, his mother, Lorraine Kelban, and his sister and brother-in-law, Daryl and Jay Marx, past and present board members, AFF staffers, transition framework coaches, and grantees. There were wonderful tributes about Kelly's work from some of those who have seen its tremendous impact. One of these remarks can be seen below. Other tributes were presented by Ken Downes (former AFF original board member and Transitions Management Consultant), Anthony Allen and Alecia Jackson (Kelly's "little brother" and his mom), Susan Bridges (President, William Bridges and Associates), Paul Griffin (AFF Grantee, The Possibility Project), Nelson and Joyce Johnson (AFF Grantees, The Beloved Community Center of Greensboro), Thomas Kelly (AFF's newly appointed Board Chair), Jennifer Pakradooni (AFF's Co-Transitions Keeper), and, most notably, our own Ingrid Hallway, who

has worked side-by-side with Kelly for the last dozen years on this unique undertaking for our family.

Nelson and Joyce Johnson of the Beloved Community Center (BCC), long-time grantees of AFF, announced the establishment of "The Steve Kelban Internship/Fellowship in Community Transitions," a gift to truly honor how much they appreciated Kelly's support over the years (see pictures below). The Johnsons stated that the Greensboro Truth and Community Reconciliation Process and the success of the work "would not have been possible without the financial and professional support of Steve 'Kelly' Kelban. At the time, foundations either did not understand our intentions or did not appreciate the significance of the processes of community reconciliation and community transitions to establishing and/or restoring equitable relationships in jobs and the economy, education, the media, police, the courts, and criminal justice, race relations, etc. Not only did Kelly and the Andrus Family Fund understand our purpose and provided funds for an initial planning grant, but they introduced us to William Bridges. As a result of the participation of BCC's leadership in several Bridges Transitions seminars, the Greensboro Truth and Community Reconciliation Process, from its outset and throughout its existence, remained anchored in the community transitions framing. Steve Kelban and the Andrus Family Fund have provided critical tools, as well as enduring friendships, throughout our process."

The Internship will be made available to university students to provide practical experience in the pursuit of community reconciliation as part of the ongoing work of the Greensboro Truth and Community Reconciliation Process. A Fellowship opportunity will also be provided for leaders and professionals, interested in learning from and utilizing lessons about the Greensboro experience.

Kelly has been an extraordinary leader at AFF. He not only has guided us as a group



Internship/Fellowship award presented to Steve Kelban

in creating this innovative organization, but he's worked with many of us on individual development. He's been a leader that has been a teacher and has informed us all about philanthropy in general, about our two program areas, and even about our own family. He's been a leader with a huge heart and has pushed many of us into emotional territory that we didn't know existed or certainly hadn't explored. And he's been a leader that's been completely dedicated to AFF, to our two program areas, to our grantees, and to the entire AFF network over twelve years.

We owe Kelly a huge debt of gratitude for all that he has done for the Andrus Family Fund and for all he has given us each individually. We will always consider him as a part of our family and hope that he will stay closely connected to AFF even as he takes on new chapters in life.

In Honor of Steve "Kelly" Kelban...



Paul Griffin

By Paul Griffin

The following is a speech that Paul Griffin, President of The Possibility Project and an AFF grantee, gave at the tribute dinner honoring Steven Kelban...

In thinking about tonight, I found myself daydreaming, reflecting. What is it that I want to communicate to honor you? What do I want

to share of my thoughts, my feelings about you and what your relationship has meant to us?

As I did, I found myself thinking about how we came to know each other, came to work together, and became friends.

Now, in The Possibility Project we tell stories, and those stories have meaning for us. That's how we approach life, if you will. I went back in time to the beginning of the story, when I first met you, in what was, in retrospect, a life-altering encounter. It came clear to me how often you had interjected your perspective, your insight, your influence in our work and my journey at very specific, very critical, very meaningful times. But first, the story....

When I met Kelly, he asked me "Have you ever thought about doing what you do for young people in foster care?" And I said "No." And he said, "Hmmm." He also said, "Have

you ever heard of or used "the transitions framework" in your work?" And I said, "No." And he said, "Hmmm." Which I realized is Kelly's way of saying, "You should."

I can see now, like anyone who understands transitions, that my life as I knew it was about to end. That is, I was about to experience a big, fat ending.

Because that conversation was the beginning of what has now been almost four years of working daily with young people in foster care along with the other 120 youth we serve. And that like any good beginning, it began with an ending. The ending of my sanity.

You see, foster care youth are "crazy." Not in a clinical way, but in an everyday life kind of way. If you treat them badly, they consider

Continues on next page...

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In Honor of Steve “Kelly” Kelban...

that normal. If you love them, it hurts. If you are stingy with money or time, they're cool with it. If you are generous, they don't quite know what to make of it. The exact opposite of life as most people experience it. But it's not really crazy. It is seeing and feeling life differently, which as any artist knows is the very foundation of creativity, the seeds of artistic accomplishment.

Before we started our work, however, Kelly didn't just say “go get 'em and good luck” he said “What can we do to help?” I said, “It would be nice to learn about foster care.” And Kelly said, “HmMMM.” And then proceeded to gather a roundtable of professionals working in foster care and allowed us to learn from them. We listened and learned a lot.

So we started, and unbeknownst to Kelly, his name was invoked many times in that first year - and not always in the most flattering way. What I mean is that when I found myself in a hospital at 1 o'clock in the morning with one of our foster youth, wondering what am I doing here and with everyone staring at me wondering why is he here with that kid, the answer was easy... “Kelly.” Or when I was working on our first show and realizing that these young people couldn't memorize lines unless they were spoken to another person, and so anyone who was speaking to the audience - and the show was full of actors speaking to the audience - was incapable of remembering their lines, and we would have to figure out how to put their writing in their hands and make it look plausible, I said, “why am I doing this” and everyone around me was asking “how are we going to do this and how did we get here,” and in my mind the answer was again very clear... “Kelly”. Or when on the first night of the first show, when I had no idea, really no idea, how it was going to go, and I was feeling nerve-wracked and terrified over what might ensue and wondering how this came to pass, the answer was definite, “Kelly.”

In the end, the show was a miracle of sorts. The young people were amazing. And everything we had worked on with them showed up on stage. The audience was blown away by them. Foster youth were so proud to hear their stories being told; others wanted to know how they could help. Afterwards, the cast was backstage, crying - sobbing really - and laughing, saying “We did it! We did it!” And I thought, how did this happen, and the answer was not surprising... “Kelly.” The next day Kelly called me and asked “Can we send flowers to the cast to let them know how much we respect and appreciate them?” Flowers were sent and the cast was floored by the gesture. And I thought, “Kelly.” He knew this would happen.

Fast forward, and as we found our way with our foster care youth, Kelly and I would speak here and there, now and again, checking-in on the progress of our work. I would share the successes we were having and the challenges we faced. There have been grantee conferences, funding meetings, phone calls, and lots of laughter and even more learning. And each time we would connect, Kelly always asked that invaluable question, “How can we help?” And I would give my not-so-invaluable answer “I don't know.” And Kelly would say “HmMMM.” And then he would make a suggestion for a solution, or make a phone call

to connect us with just the right person, or just listen and say, “You're doing great. But what if you thought about it this way.” Focusing our work, like his care and concern, on what really mattered, which was the young people we served and making a difference for them. As I ponder this story, I become aware of what I need to say to you, Kelly. I know the answer to my question “what is it that I want to I say?” And the answer is “thank you.”

Thank you for gently daring us to work with foster care youth. Thank you for challenging us to dive into making life better for these incredibly vulnerable young people. Thank you for believing in them. Thank you for believing in us. Thank you for respecting our challenges and struggles. Thank you for recognizing our successes and always supporting our effort. Thank you for all of the lessons and wisdom we have gained and the difference that has made for us, as people and as professionals. But most importantly, thank you for the difference you have made for them. Every one of those youth who has benefitted from our work has benefitted because of you. We couldn't have done it without you. We wouldn't have done it without you. Our accomplishments are yours, too. And so are the accomplishments of so many other organizations that have made a difference with the support of your leadership. And so now that you are taking the next step on your journey, I want to give you something from us. These are the words that concluded the first show we did with our teenagers, written by them about their lives. They are spoken by Nickel and Dime, two homeless youth performing on a subway train, who are speaking to the audience at the end of the show. And this is what they say:

Nickel: Our lives might be hard...

Dime: But we will continue to strive for a happier life.

Nickel: The future may be uncertain....

Dime: But we will have courage and find our way.

Nickel: The world may still be crazy....

Dime: But it is our responsibility to make it less so.

Nickel: And why do we believe these things?

Dime: Because we know in our hearts, we are here for a reason.

Nickel: To make life better for ourselves, our families, our friends, even you.

Nickel: We want your faith in our futures.

Dime: Because we can't do it alone.

Nickel: We need you. All of you.

Dime: So come along and join us for a different ride.

Nickel: A different life.

Dime: A different future.

Nickel: A new beginning.

Both: Cuz we are just getting started.

As you get started on this new chapter in your life, Kelly, we look forward to continuing to ride with you to a different future, a new beginning. Grateful for what you have given us. Ready to support you. I am sure you will continue to support others, making life better for those you touch. As you have done for me, and for all of us.

Thank you, Kelly. Thank you, thank you, and thank you.

WHAT'S HAPPENING AT...

Helen Andrus Benedict Foundation

By Kate Downes and Barbara Greenberg

The Helen Andrus Benedict Foundation (HABF) budgeted \$636,000 in grants for 2012. The funds support Westchester County organizations which carry out our two missions: 1) to create communities in which people can grow old and maintain the maximum possible levels of independence; and 2) to mobilize older people to volunteer their talents and abilities to enhance the quality of life for people of all ages in their communities. Our programs continue to be nationally recognized for their innovations and successes.

One of our most exciting projects is the creation of the Center for Aging in Place, which provides technical support and resources to community-led groups in Westchester County that want to develop neighbor-to-neighbor programs to help adults age in place in their own homes. The Center has supported the launch and growth of ten new neighborhood aging in place programs in Westchester with a total membership of nearly 1,000 older adults. Each of the sites helps neighbors grow older safely at home while maintaining strong connections with their community. Each group plans social events, wellness activities and educational programs, and offers information and referral to services, as well as transportation to medical and personal care appointments.

Aging in place programs make a difference in the lives of residents and communities throughout Westchester County. For example, in 2011, aging in place programs provided more than 1,200 rides to important doctors' appointments, physical therapy, supermarket, and social activities. Access to these rides means family members don't have to leave work and older residents don't have to feel like a burden. The majority of services are provided by volunteers – neighbors helping neighbors – who collectively contributed more than 20,000 hours of help in 2011.

Featured in the accompanying photo are HABF board members who visited with community leaders at Iglesia San Andres, a Latino Episcopal church in southwest Yonkers which hosts one of the new aging in place initiatives. At San Andres, older adults participate in weekly Zumba dance exercise classes and a walking club. Members have lost weight and report less pain associated with chronic conditions like arthritis. Women in the walking group and exercise classes are now the organizers, not the followers. They take the initiative and encourage others to attend because they have seen and felt the benefits!

New Board Members

Since its inception in 1997, the Helen Andrus Benedict Foundation Board of Trustees has been comprised solely of Andrus family members. We are thrilled to announce that four non-family community members have agreed to serve on the Board. All have been serving on the Andrus on Hudson Board, so were able to quickly absorb our family's work on behalf of the residents of Westchester County, particularly in Yonkers and Hastings-on-Hudson. It is truly an honor to benefit from their collective gifts and insights.

Rachel Grob, PhD. is on leave until next year from her position as faculty member in Sarah



HABF Board of Directors

Lawrence College's Health Advocacy Program. In the meantime, she is Scholar-in-Residence and Director of National Initiatives at the Center for Patient Partnerships, University of Wisconsin-Madison. In that position, she is leading the Center's policy and research initiatives, collaborating with Center staff and other visiting scholars on patient advocacy field-building projects. She is an experienced educator, coalition builder, and qualitative researcher and has worked as a health advocate in public, non-profit, and community settings.

Robert L. Cadoux, Esq. is a corporate, real estate, and business attorney. He has been a principal or trusted advisor in real estate, internet, product testing, and wireless businesses and is holder of a patent for conducting initial public offerings of stock. He has served in a consulting capacity to many other businesses that include dairy, toys, and construction material and in an on-going legal advisory role to manufacturing, consumer product, consulting, real estate, and foreign entities. Bob is also a volunteer firefighter in Hastings-on-Hudson, where he has served as Captain of an engine company.

Irene A. Gutheil, DSW is a Professor of Gerontology and founding Director of the Ravazzin Center on Aging at the Fordham University Graduate School of Social Work. Before entering academia, Irene worked with older adults and their families in community and institutional settings. Her scholarship and research interests include aging, end-of-life issues, community program evaluation, and the impact of the physical environment. Irene has been instrumental in the school's efforts to integrate more aging content into the curriculum and prepare skilled social workers for our gaining communities.

Bruce Jennings, MA is Director at the Center for Humans and Nature, a private operating foundation that studies philosophical, ethical, and policy questions that arise at the intersection of public health, environmental/ecological science, and democratic theory and

practices. He also teaches at Yale University and is a member of the ethics advisory committee of the Centers for Disease Control and Prevention. During his 8-year tenure with the Hastings Center, he directed research projects on the care of the dying, health policy, chronic illness, and long-term care. He is currently completing a book on dementia and the ethics of long-term care.

HABF is privileged to have so much talent. As I said at the June HABF grantee meeting, blood is no longer the sole criteria for Board service – we now have brains!

New Website

Thanks to our Board member and cousin, Bob Hedlund, HABF has a fabulous new website at www.HABF.org. The site outlines the foundation's mission and highlights the work done by HABF to improve the lives of older Westchester County residents. Visitors to the site can review all grants that the foundation has made since its inception, read about our current grantees, and learn more about the academic thought used to decide how best to make Yonkers and Westchester a great place for people to grow old and remain engaged. The site aligns itself with the Surdna site in presenting the Andrus family history and philanthropic endeavors in an attempt to provide content that is consistent, reliable, and current.

The hope is that the site will also be a launching point for gathering content and allowing the HABF grantee community to keep informed about the work being done by their colleagues. Eventually, we would like to create a newsletter for the community and family with Andrus on Hudson that shares the work of these philanthropies and their relationships with the local community. The HABF board and Andrus family are grateful to Bob for the countless hours he invested in creating the website (and will continue to invest, as he works to keep the information current). Be sure to take a look!

WHAT'S HAPPENING AT...

Andrus on Hudson Celebrate Changes

By McCain McMurray

Health care is big news these days. I didn't realize how much I would learn about it when I joined the Andrus on Hudson (AOH) board. The more I learn, the more I appreciate what we have at AOH, how well it is managed, and what we do for our residents. We provide a home for them where we take care of each resident's specific medical, social, and personal needs and desires. All of our care as well as our facilities are highly regulated by the New York Department of Health. We are also regularly inspected to make sure we are meeting all of the requirements. It's a tough business.

Into this mix now comes major new regulatory requirements for nursing homes in New York State that change not only how we are reimbursed for resident care, but also place a new emphasis on coordinated care and home- and community-based care. All of this means changes for AOH.



Entry rotunda at AOH

We are working to position ourselves to take advantage of these changes. We have hired consultants to analyze our operations, staffing, management, finances, local market conditions, and competition to evaluate how all of these relate to the regulatory reforms. Their task, as they identified it, is to take the many unknowns of the new health care laws and "make the future predictable."



Residents and staff in lobby rotunda of AOH

Their initial reports give us great marks for our location, extensive grounds, impressive building, caring staff, private rooms, and extra space for new programs. I think our biggest strength is our excellent management team that has been able to manage the funds available and balance the budget. We have just hired a new Director of Admissions to strengthen our management staff. Our finances and operations are in good shape thanks to the exceptional management team of Betsy Biddle, our Executive Director, Patricia Walsh, our Administrator, and Novella Kelly, our Director of Finance.



Front View of AOH

We continue to improve our building. In addition to the recently completed roofing and exterior wall work, we are having new elevator cabs and controls installed. As we look to the future, we are evaluating other building systems such as heating and air conditioning, egress doors, windows, kitchen equipment, and updates to wall and floor finishes. Exterior work includes sidewalks, lighting, and signage. We expect to be involved in this work for the next several years.



Resident's Room

I think we are well positioned to be a national leader in elder care. That's our goal. It's all about our residents. AOH is not just where they get skilled nursing care. It's their home.



Residents at lunch

On a final note, I want to join my fellow board members in thanking Josie Lowman for all of her years as AOH board chair. She has shown a sure and fair hand in guiding us through the many challenges we encountered in her tenure. I will step into her shoes, joined by Beth Shogren as Vice Chair and Bob Hedlund as Treasurer.



Residents at the annual art exhibit Matters of the HeART

JULIA DYCKMAN ANDRUS MEMORIAL

Another Year of Growth & Change for the Memorial

By Nancy Woodruff Ment, President & CEO

In 2013, the Julia Dyckman Andrus Memorial will celebrate our 85th year, a remarkable achievement born out of John Andrus' commitment to children. Over the decades, strong partnerships across family, community, professionals, the public sector, and private funders have ensured that his original intentions have been not just safeguarded but greatly enhanced for the benefit of children in need. In our Board Room, we have a copy of the original Yonkers Statesman article of September 23, 1927 when he announced his intention to build a "Haven for 2000 Orphans" on the Dyckman Farm. He estimated the cost of construction to be \$3 million.

Today, with an annual operating budget of \$30 million, the Memorial directly reaches more than 2500 children and families across Westchester County and thousands more across the country and around the world through the work we do with the Sanctuary Model of trauma-responsive care. We are proud to share our inspiring goal for our next five years: Andrus will be a national leader in shaping policies and practices that prevent and overcome the effects of childhood adversity and promote resilience to secure strong, healthy futures for children, families and communities.

At this time in history, far more of our mission is expressed off the grounds of the homestead than on. But through wonderful partnerships, we have been restoring buildings and broadening opportunities for children to succeed. Thanks to the philanthropy of Dr. Steven and B.J. Andrus, we have undertaken a major renovation of McGee Hall, our field house actively used by the 155 children in our Campus Programs, as well as by members of the local community. We have been steadily recapturing former farm elements in "Hope Space," acreage we set aside to incorporate renovated greenhouses, organic gardens, the memorial labyrinth for John Gorman Griffith, a tree nursery, chicken coops and, our newest additions, three gentle and green eating machines – Alpine goats named Birch, Maggie and Hickory. John E. III, along with Libby, Julie and Katie, generously supported our advances with Hope Space. The fall of 2012 will bring three Merino ewes, a gift from Board Treasurer, Steven Friedman. Two River Towns Garden Clubs have been particularly drawn to Hope Space, providing technical support and resources for us to build a kitchen in the greenhouses where children can prepare the foods they have grown.

Over the last 25 years, we have followed an incremental course of extending our services off the Campus and into the communities



Maggie, Birch and Hickory arrived on campus in April and have proven to be both attractive to and therapeutic for the children in our care

of Westchester County where children and families need us. In this past year we solidified our relationships with the public school districts in Yonkers and Peekskill by embedding mental health services in high-risk schools and providing trauma-focused training to teachers and administrators. In April, we celebrated a different kind of public/private partnership when we opened The Andrus Early Learning Center on two floors of the Village Hall in Tuckahoe. This new state-of-the-art child care program now serves 120 infants, toddlers, and pre-schoolers through age four in a rich array of normative, special needs inclusion, and Head Start programs. Patrons and volunteers from the community have ensured amazing support for this long-planned project. Director Emerita Sharlyn Carter and her husband, John Mack Carter, underwrote the Arts Wing, complete with an art studio and children's theater. Director Emerita Margaret Cady's name appears on the Faculty Resource Room. Local groups have provided support for evening and weekend programming for local families including "Before the Stork" groups, family yoga, and arts programs.



Dr. Stephen and Mrs. B.J. Andrus, left and right, welcomed Board member Ham Pakradooni and ANDRUS President Nancy Woodruff Ment for lunch last fall to celebrate the couple's lead donation, the largest personal gift in the agency's history since our founding, for the renovation of McGee Hall

We sank even deeper roots in our home community of Yonkers by spearheading an advocacy campaign to increase public awareness on the public health implications of childhood adversity. A highly regarded long-term research study (ACE Study) conducted by the Centers for Disease Control and the Kaiser Permanente healthcare group in California has documented high correlation between adverse childhood experiences such as abuse, neglect, family violence, and loss, and long-term poor health outcomes, even early death. We believe that this information needs to be incorporated into public policy at many levels to ensure that timely and appropriate interventions can correct a potentially negative course. Requests to us from Yonkers stakeholders for pro bono Town Hall Meetings on the subject have surpassed our expectations. We are building a coalition of community groups and stakeholders to press for the creation of a first-ever Office for Children in the City of Yonkers.

In 2001, Andrus began a journey with the Sanctuary Model of trauma-informed care fully aware that we had no idea where the road would take us, but knowing that we would keep on going until we found the best possible approaches for treating children affected by trauma, loss, and repetitive stress. We did not know that we would find a community of providers, funders, and policy makers who would share our belief that the Sanctuary Model truly is a "better way." Through our



December 2011 brought an unexpected "family reunion": Mary McGee Graf and husband Jack, second and third from the left, visited campus during a Board meeting and caught up with cousins (from left to right) Ham Pakradooni, Mary Meador, Christopher Gilbert, David Earley and Larry Griffith

Sanctuary Institute, partially funded in its earliest stages by Surdna, Sanctuary has now been adopted by 250 organizations in seven foreign countries and 23 of the United States. Sanctuary Highlights of the past year include two 'mountain top' occasions. 2012 marked the continued international expansion of the Sanctuary Institute in the Southern Hemisphere. In February, our COO Brian Farragher traveled to Singapore to keynote the annual Residential Care Conference attended by more than 400 practitioners followed by a week-long training and consultation program for the Ministry of Children, Youth and Sports. Two months later, a delegation from Singapore visited campus to continue the conversation that will enter a new phase in 2013 when we guide their three-year process of incorporating Sanctuary into their services. In May 2012, three of our staff traveled to Tasmania to begin the three-year training process for Anglicare, a youth-serving program in Australia's island state. Anglicare is now the 51st agency in Australia to have made the commitment to Sanctuary. When we talk about the application of Sanctuary to different cultures, Australia represents a distinct set of challenges because of their efforts to redress the painful history of treatment of Aboriginal peoples.

Growth and change of the magnitude we have enjoyed has only been possible because of the passionate engagement of our 24-member Board of Directors in our mission. The "Dean" and former Chair of the Board, Larry Griffith, continues to set the standard of grace and persistence to pursue excellence. We celebrated Larry's 40 years of Board service in June by installing a bench in front of Dyckman Hall where visitors can enjoy our butterfly garden. Family members from the West Coast, Christopher Gilbert and Mary Meador; Midwest members Nancy Spensley, Richard Thorpe, and David Earley, and Northeasterners Ham Pakradooni and Phillip Andrus make frequent journeys to Yonkers to fulfill their service on the Board. We have added a webcam portion to our electronic Board and Committee attendance thus affording some special glimpses of Rich's dog in Minneapolis snow and Christopher's son bouncing on the bed while we grappled with some challenging policy conversations. The enduring commitment of generations of the Andrus family in the Memorial is a powerful attractor for the non-relative Directors who come from our geographical community, just as it is for our staff. The life story of the little girl, Julia Bourne Dyckman, resonates through our mission, our values, and our goals. We never forget what a privilege it is to carry the story forward.

A Friend, Mentor and Guide Makes a Transition

By Jennifer Kasoff

Cover Story

we had landed back in New York, Bill Bridges had written a memo about how the TF might work in a foundation committed to social change. We brought the memo to the board when we still did not have defined program areas, and talked about how it could be useful in multiple programs. The board decided they would adopt the TF no matter what programs we ultimately picked. That was a very unusual thing to do - to choose a theory of change before choosing the change itself. It's worked out really well.

How do grantees react to the Transitions Framework?

The initial grantees talked about transitions without knowing much about it. They tried to adopt the framework because it was a requirement. We were in a learning stage together, board, staff and grantees. We realized after the first few rounds of grantmaking that grantees needed more help understanding the transition framework, so we decided to engage and train coaches, who in turn could assist grantees in both program areas. This turned out to be a great move. Over time, the grantees, particularly our foster care grantees, have become huge fans of both the coaches and the Framework and have produced fabulous material that has helped their own organizations adopt and benefit from the TF. Now we are in the wonderful position of being able to post all the material produced by grantees on our websites so that other organizations, whether funded by us or not, can have access to a treasure trove of helpful and relevant resources.

Our foster care grantees became convinced that training foster care staff and youth in the TF was making a difference, and they and we wanted to see if we could document that. And in fact we have. The Oregon Social Learning Center conducted an eight-year study that showed that the theory behind the Transitions Framework was operating as intended. Specifically, bolstering the awareness of transitions as an internal process and creating increased openness to change improved youths' ability to cope with the changes they were facing.

Can you talk about working with the grantees?

It's a joy. Our grantees are fabulous organizations with fabulous people. I've learned so much from them. All foundations want to be thought of as partners, but we know the grantees do the work. We support them. We learn from them.

And we learn a lot. For example, some of our community reconciliation grantees told us that the Transitions Framework was written by and for our culture but not for others. We discovered that we had to let grantees, and those with whom they were working, take the framework and alter its language to fit their cultures. We let the youth in foster care use their own language too - they renamed the stages of transitions and paired popular songs for each stage. Learning from the grantees led us to expand the theory to meet more



One-arm Kelly does his part. AFF Board and Staff plant trees at the Julia Dykman Andrus Memorial/ Andrus Children's Center (2007)

peoples' needs by paying attention to who the people are.

When I talk about grantees and how wonderful they are, the real place we see it is at the grantee conferences. They are incredibly connected to each other after coming together every year or two. There have never been any turf problems. They want to share and help each other. Their relationships continue after the conference. They love those conferences.

I learn so much at the grantee conference and really get to understand what the grantees need and what challenges they are facing on the ground. That's the time I feel most like a partner.

Are there any grantees or specific work you would like to highlight?

It's hard to choose given how much great work has gone on. On the foster care side, I

take great pride in the collective achievement, the field-changing nature of what these grantees have accomplished. I have already mentioned the study. It confirmed what we hoped and what the various grantees had experienced: young people need attention to be paid to their internal experience as well as the external change. And the TF is an extraordinarily valuable tool in that work. Government agencies and large nonprofits are now exploring the use of the TF within their organizations. Our grantees are partnering with these agencies to teach the Transitions Framework so youth across agencies will have people talking to them in the same language. It's a huge thrill.

On the community reconciliation side, there are many wonderful grantees as well. One in particular, though, has a special place in my heart. We made an early grant to the Beloved Community Center in Greensboro, North

Carolina and they undertook the first Truth and Reconciliation Commission (TRC) in the U.S. They developed a truly sophisticated approach to creating both the environment and the mechanisms to produce the TRC and then had the courage to cut it loose to allow the Commission to become the independent non-partisan group it needed to be. That was bold and hugely impressive. The Commission did its work and produced a report; the city is still working on recommendations from the Commission. As with South Africa globally, the Greensboro TRC is a model that many people are looking at. There are now four other TRCs around the U.S. at different stages of development, which we are supporting. Greensboro helped us learn how we could use the Transitions Framework within community reconciliation work, and that is immensely gratifying.

Share how racial justice became such an important part of AFF.

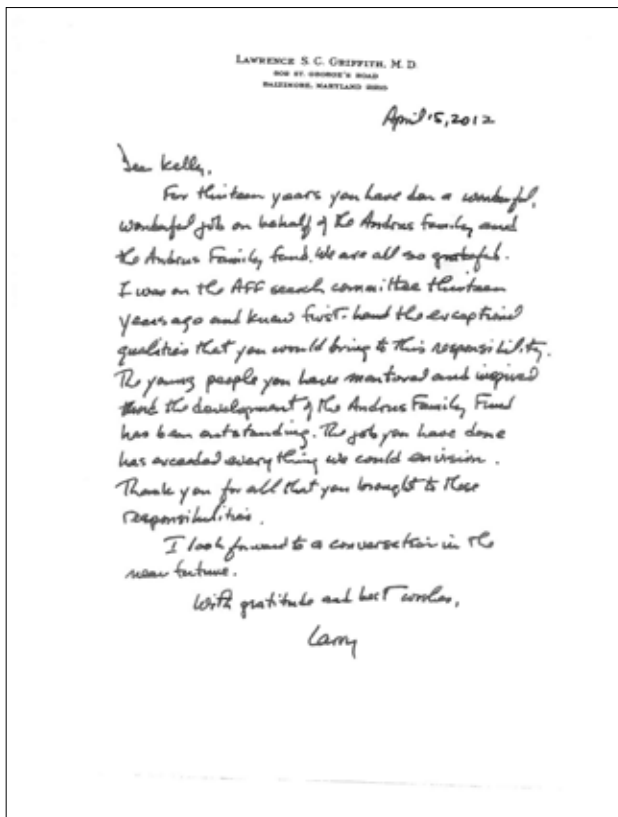
I'm so proud of the AFF Boards for stepping up to address racial justice, what it means, how it affects our work and our decisions. AFF is a family foundation. By definition, family boards are more limited in demographic scope than non-family foundation boards can be, although of course, many non-family foundation boards don't look that different than family foundation boards. What are the implications of our more limited point of view? And how do we address that so we make better grants? The Board's focus over the years on issues of racial justice will help them, I believe, make better-informed decisions, and, grant decisions that will produce better outcomes.

What are some of the biggest lessons you have learned working with the grantees?

I learned something about breadth versus depth. We chose depth. We learned it is worth putting funds aside to invest more deeply into



Nelson and Joyce Johnson of the Beloved Community Center present internship/fellowship award to Steve Kelban



Larry Griffith's tribute to Steve Kelban

a limited number of programs than to expand our reach and have more grantees, but with less individual support. It costs money to provide coaching to all of our grantees, but the value is clear. These are organizations that do not very often get the opportunity to have consultants working with them. The coaching helps them and their programs.

I also learned – again - to pay attention to the power of role. We need to pay attention to the power relationships between funder and grantee. And also acknowledge the value of ground-level expertise the grantees bring.

Any parting thoughts about leaving this role after nearly thirteen years?

There is so much to say and many people to thank. My job had lots of parts and one we haven't focused on yet is Surdna's hope that I would be able to expand the number of Andrus family members involved in family philanthropy and public service. With the creation of the Andrus Youth Service Program, the Board Experiential Training Program and the Andrus Family Fund, we now have a pipeline for high school, college and graduate students, and young grads to be involved in the varied Andrus philanthropies. We have gone from 16 to 110 family members involved in some way. And three former AFF board members are now on the Surdna board. From 2000, there are 42 family members who have been involved with AYSP, 21 with BETs and 28 with AFF.

I think there is room to grow this as well, perhaps creating new mechanisms to expand the number of people involved even further. Maybe short-term bursts of experiential learning to provide more family members with these experiences. Surdna, under Edie Thorpe's leadership, has demonstrated what is possible for family philanthropies. It has shown how to devolve authority and involve the next generation in serious ways. It has done more in this area than anybody else and deserves

recognition for this. I know that Kelly Nowlin, the new Chair of the Family Involvement Committee, with the support of the Surdna Board, will continue to support the creation of new ways for family members to become involved.

In 2000, Surdna Board Chair Libby Andrus addressed the AFF Board and said "the only charge Surdna is giving you is to make us uncomfortable." Those were the marching orders, and that empowered our board to become a board that could think independently. It was very important and much appreciated. It helped our board understand the possibilities. The goal of AFF, with clear Surdna support, wasn't to duplicate Surdna; it was to create their own thing.



Steve Kelban and Ingrid Halloway, AFF's Senior Program Associate

A very big thank you to Edie Thorpe for her collegueship and her years as the Family Involvement Chair, who created the possibility of these programs for the younger generations. It was my fortune to be picked to lead it. And I need to deeply thank my colleague, Ingrid Halloway. I hired her as a temp and never let her leave. She's the Andrus family knowledge bank, historian and my friend. And the best work partner a person could have. It has been a privilege and an honor to serve as the founding Executive Director of the Andrus Family Philanthropy Program and the Andrus Family Fund. I believe that with the continued support of Surdna, both programs will continue to not only flourish, but to expand their outreach to new family members and increase their impact on the social change efforts they fund. I will be watching with interest and great pride.

What's Happening At Surdna



Phil Henderson

By Phil Henderson

With the arrival last November of Judilee Reed to be the director of Surdna's Thriving Cultures program, we found ourselves with a complement of three program directors leading Surdna's three core grantmaking programs – Thriving Cultures, Strong Local Economies, and Sustainable Environments – who were all in the job less than a year. Judilee joined her counterparts Shawn Escoffery (Strong Local Economies) and Michelle Knapik (Sustainable Environments) and all of them had an appetite to refresh the strategies that were being pursued in their programs.

This pulse of new energy and creativity couldn't have been timed better. Surdna had been working for months on developing a Roadmap for the institution that would point the way for the foundation over the coming few years. The key pillars of the Roadmap, which was formally adopted by the Surdna Board in September 2011, were: clarifying our program strategies, becoming a more effective learning organization, enhancing internal leadership, and focusing on strengthening and streamlining our governance. The arrival of

new program directors for our three programs added impetus to our interest in clarifying our program strategies.

In late fall 2011, led by Sharon Alpert, Surdna's Senior Director for Programs and Strategy, we developed a three step strategic focusing plan for each of the three programs to move from a general sense of what we were working on to a clear and actionable set of ideas and desired outcomes. This process included testing hypotheses, researching and testing ideas out in the field, and then an operational phase, which we are just beginning now, that would feature a strong feedback loop of learning and adjusting strategies as we go. To help us through this work, we retained the Foundation Strategy Group (FSG) to work closely with our staff and to help us keep on track. Throughout the winter, spring, and summer, we have been engaging with the Surdna board on our progress, and that set of deep discussions about ideas and hypotheses has been tremendously helpful in getting us to a set of program plans that feel appropriate to Surdna's mission to foster the development of sustainable communities, but are also ambitious, yet balanced.

Each of the three programs now has a few lines of work they are going to be focused on with the explicit aim that the lines of work interrelate and, therefore, allow for interesting cooperation among the three programs. For example, the Sustainable Environments program has chosen to focus on building the next generation of urban water, food, transportation, and energy infrastructure. This will include assisting projects like Philadelphia's

ambitious program to improve stormwater capture by increasing urban green space, using permeable pavement, and building green roofs, rather than simply building more and larger pipes to carry stormwater out into local rivers and lakes. Our Strong Local Economies program, which is focused in some considerable measure on jobs, sees investment in stormwater management infrastructure as an opportunity to hire more locals in its construction, to ensure that local businesses get in on the action, etc. And our Thriving Cultures program, which has a line of work focused on improving the design of our community spaces and urban landscape, sees in this kind of project an opportunity to infuse Philadelphia's investments with better and more effective design elements.

This is just one example of the kind of interplay we are seeing emerge among our three programs, and our strategic focusing work over the past many months has set the stage to allow for more such work. For more information about Surdna's programs and for detailed descriptions of both our individual program strategies, as well as a description of how Surdna's strategies add up to greater impact on the development of socially just and sustainable communities, please see our website (www.surdna.org) or come by our offices for a conversation.

New Office Administrator Rosecarmel Edouard



Rosecarmel Edouard joined Surdna as the Office Administrator in October 2011. In this multi-faceted role, she is responsible for human resources and office administration. First, she manages human resources for the foundation, including acclimating new staff, maintaining relations with current staff members, employee relations, benefits management and payroll administration. Second, she handles the office administration, including accounts payable and facilities and supplies management.

She considers one of her most important roles to be making herself available to staff. "I want staff members to have a level of comfort with me so that they can come to me with issues and concerns. I'm always open to recommendations for new processes and procedures," she explains.

Rosecarmel came to Surdna from Johns Hopkins University's Jhpiego Health Organization. Jhpiego, an international health nonprofit of 2,200 employees, is dedicated to improving the health of women and families in developing countries by providing health care and health awareness. While at Jhpiego, Rosecarmel worked in a role that focused on human resources both nationally and internationally, supporting staff in more than 35 countries. Having come from a large organization, she loves the intimate size of Surdna. She was first attracted to the "family feel" of the foundation and enjoyed learning about its history.

She was born in Haiti, and moved to New Jersey as a child. After her previous job in Maryland, she was looking for a return home closer to friends and family. Her first year at

Surdna has brought only positive impressions. "The staff and board members are a very dynamic group. People are very passionate about their work. We all come from different backgrounds, but we are all here to focus on the mission. People are really engaged in and dedicated to the work we do."

Rosecarmel's undergraduate studies at Rutgers University led to a joint degree in Labor Studies and Employment Relations and Journalism and Media Studies. She speaks English, Haitian Creole and conversational French. She describes herself as a big music and independent movie buff who does yoga frequently and drinks green tea "like its going out of style."

SURDNA

New Surdna Grants Manager Adriana Jiménez



Adriana Jiménez joined Surdna as the Grants Manager in February 2012. She brings her interest in the program areas and passion for organizing and creating systems to this brand-new role at the Foundation.

Prior to joining Surdna, Adriana worked at the Helmsley Charitable Trust -- another family foundation—as well as various arts organizations. “I had heard about Surdna

and admired the Foundation for years before joining. Surdna leverages its assets very well through its advocacy work and partnerships, and its program areas are all specific interests of mine,” she explains.

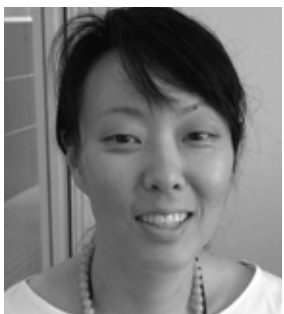
Surdna created this new position to centralize all of the Foundation’s grants management. Adriana describes herself as an organizer and systems person, so the chance to create a new set of systems at Surdna is right up her alley. “I’ve always been a very curious person, and I’m definitely a generalist. What I love about this position is reading proposals from all three program areas and learning about a wide range of topics.” Her academic background is in the visual arts.

Since coming to Surdna, Adriana has been impressed by how transparent the organization

is in every detail—from open-door staff meetings to board meetings. She appreciates working at a “cutting-edge” foundation.

Adriana moved to New York City eight years ago, after many years of living abroad. By heritage, she is Costa Rican, Italian, and American, and she grew up in Mexico City, among other parts of the world. She is fluent in English, Spanish, and Italian, and also speaks some French and Turkish. When not at work, she enjoys yoga, wine tasting, and fine food, in addition to a lifelong love of travel.

New Thriving Cultures Program Director Judilee Reed



Judilee Reed joined the Surdna Foundation in November 2011 as the Program Director for the Thriving Cultures Program. She was formerly the Executive Director of Leveraging Investments in Creativity (LINC), where she established and led successful projects focusing on building the capacity of community-centered arts organizations, improving artists’ access to information about America’s changing health care policies, and generating awareness of the increasingly diverse demographics of communities around the country.

Judilee has known Surdna and its work in the arts arena for many years and always respected its work. “I was very intrigued by the work

Surdna started doing around 2010-2011, when they started focusing on new issue areas in the arts program connected to social change and community-driven design. These were new steps for the foundation that complemented program areas that LINC had been exploring,” she explains.

The interview process continually solidified her interest in Surdna. As she met with more program and senior staff members, “it continued to deepen my learning about what a collegial, friendly, and focused environment Surdna is shepherding.”

She joined Surdna after a time of re-focusing of program areas and when other new Program Directors were coming on board, too.

“I was thrilled to have the opportunity to work with fellow Program Directors who are also relatively new. Once we were all in place, we hit the ground running on a strategic refinement process. It has been a great opportunity to look at the history of exceptional work and think about how current conditions may impact the future of the field of arts and culture. Cross fertilization of ideas and expertise happening

within and outside of the foundation offers us enormous potential for collaboration with the Strong Local Economies and Sustainable Environments programs. As we complete the planning process, we will share a new vision for the Thriving Cultures program that carries forth the core values of the prior program but with some changes that allow it to feel fresh and responsive to communities today.”

Like many people newly involved with Surdna, Judilee is impressed with the level of board involvement. “One of the early surprises for me in joining Surdna was how dedicated its board is to the mission and to the design and delivery of the programs. It has enriched our strategic refinement work. I find it very exciting to engage with board members who come in with the best questions about what we are proposing or exploring. They are both curious and invested in the work we are doing. It’s been a real pleasure for me in this position.”

Judilee holds a B.A. in art history and a B.F.A. in painting from the University of New Hampshire, and alumni status at Harvard Business School.

New Executive Assistant Tuere Randall



Tuere Randall joined Surdna as the Executive Assistant to President Phil Henderson in March 2012. She is attracted to the mission and program areas because “they are so perfect for what we need in this country and where we need to be innovative and visionary.”

From her first introduction to the foundation, she found it to be a gracious, intimate, and welcoming environment. In her role, she handles Phil’s busy calendar, ensures he and other staff members have what they need for meetings, organizes staff outings, responds to requests of all types, and generally keeps Phil’s office moving along smoothly.

She comes to Surdna from similar positions at other organizations. “My role is similar to other places in terms of what is expected. Surdna is different because it is smaller. While everyone is very professional, it’s a little more laid back. After working at nonprofits, it’s a big difference to be at foundation where we are giving away money instead of trying to get it,” she explains.

Her other professional interest is as a writer. “Outside of work, I’m almost a complete hedonist,” she says. She is a fashion, beauty, and travel writer focusing on luxury lifestyle brands. She is also an animal lover and involved in animal welfare issues.

Tuere was born and raised in Harlem, and has her B.A. from the University of North Carolina at Chapel Hill.

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John E. Andrus III celebrated his 103rd birthday with daughters Libby, Katie and Julie