



CONCINNITY

The Golden Years of Change

The retirement community that Helen Andrus Benedict built 50 years ago as a living memorial to her father, John E. Andrus, is thriving! Andrus on Hudson, the community that has consistently provided the finest environment for Westchester elders to age gracefully, continues to provide a continuum of service and care to foster healthy and independent lives for its residents. While still the enduring and gracious environment that Mrs. Benedict built, Andrus on Hudson went through a metamorphosis as it approached its fiftieth anniversary.

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by Libby Andrus & Edie Thorpe

From the Surdna and FIC Chairs



Libby Andrus & Edie Thorpe

Happy birthday to us! The Andrus Family Philanthropy Program is five years old this fall. It continues to entice and engage more Andrus family members than ever in many ways in our five family philanthropies.

Three cousins joined boards this past year: David Earley and Phillip Andrus, M.D. at the Julia Dyckman Andrus Memorial, and Colby Andrus at the Andrus on Hudson and Helen Benedict Foundation. A new volunteer family webmaster has been identified, Bob Hedlund. New authors are contributing to this issue of *Concinnity*; a new class of teens joined the Andrus Youth Service Program; and the Andrus Family Fund will be adding new board members soon, as the first founding members of that board begin transitioning off to make room for more young cousins. Thanks to all of you for your interest and willingness to serve all these fine institutions.

Surdna, too, will add two or three new board members in the next 6-9 months. Five years ago, the Surdna Board committed itself to a succession plan—to add new family members to the board (five have been added since 1999), and then to add two or three non-fam-

ily directors. The current board felt strongly that it could benefit from the outside perspectives of such individuals. In the spring of 2004, a national search was launched to identify such people. Work and interviews continue on this process, with the expectation of electing two such people in the winter of 2004-05. Clearly, Surdna will remain a family foundation, but outside voices will enrich and enliven our work.

Also over the past year, Surdna board and staff have been engaged in a process to identify a system of success measures for the Foundation. Such a framework will enable us both to track our grantmaking and to understand the impact and effectiveness of our work in the non-profit sector. In this age of increasing demand for accountability in the philanthropic sector, this work will position us well in defining and supporting the program areas into which Surdna puts its money, time, and energy.

Surdna is blessed with an amazingly talented and responsive staff. Many of you have had the privilege of meeting them. When one of those individuals leaves us, we all lose something special. Carey Shea has been the program officer

for the community revitalization program for 7 years, and stepped down in August 2004 to take on an exciting new position as chief operating officer of New York Habitat for Humanity. Those of us who have worked with Carey have appreciated her intellect, her street smarts and knowledge of the sector, her inquisitive nature, and her very facile wit. Board meetings, site visits, and conference calls with Carey have always been educational, interactive, and fun. We will all miss her greatly and wish her well at Habitat.

The Andrus Family Fund continues to flourish, with wonderful staff support from Kelly, Sabena, and Ingrid. The Fund has made a real name for itself nationally in its program areas, and has done a great deal of internal work to strengthen its grantmaking, evaluation, and governance areas. Caitlin Boger-Hawkins was asked to speak to a group of younger family trustees of the Emily Hall Tremaine Foundation in June 2004 to share some of the stories of AFF. We expect more such requests to be forthcoming in the years ahead.

As we enter our sixth year, AFPP hopes to continue to strengthen our family's philanthropic thrust

by identifying more people for service, by offering new opportunities for different age groups, and by fostering and encouraging the interaction of all participants. The joint meeting of the five boards in September 2004 will be a milestone event for our family...as all your cousins serving on those boards meet to share history, ideas, and plans for each organization. Great synergy for a great family. We think John Emory Andrus would be proud!

Now a note from Libby: This is the last letter that I will write as Chairperson of the Surdna Foundation board. In November, I will step down after serving ten years in a leadership capacity, five as the Vice Chairperson and five as the Chairperson of the board. It has been an incredible privilege and honor to work with the committed board and staff of this remarkable family foundation, and I am very grateful to have had this opportunity to serve. Surdna is a foundation of distinction in the world of philanthropy, and the Andrus family can be very proud of its significant contributions. I am.

Staying Connected



Steve Kelban

by Steven Kelban

Executive Director, AFPP & AFF

I write with exciting news for the upcoming year. After a three-year search for a volunteer designer and webmaster for the family website, www.andrusfamily.org, I am pleased to announce that Bob Hedlund has stepped up to the plate. Bob, a software developer for a financial services company, lives in Boulder, Colorado, with his wife, Anne Benedict Hedlund, and their two children, Grace, 4, and Henry, 2. Sabena and I spoke to Bob in July and were impressed by his knowledge and enthusiasm for the project. We're beyond joyful that there's someone from the family with both the skill and the interest in re-designing the website and serving as webmaster.

Though a web redesign is in the preliminary stages right now, our goal is to incorporate news of the extended family and the family philanthropies with family history,

genealogy, photos, and, perhaps most importantly, a searchable list of family members to make it easy for you to contact each other. Keep your eyes open for continued updates. Please also take a moment to look at the password-protected website and email us at info@affund.org with your suggestions.

This summer, an Andrus Family Fund founding board member, Ken Downes, resigned from the board to take advantage of new and exciting professional development opportunities. Ken's calming, sensitive, and thoughtful presence will be both honored and missed.

The AFF board received six incredibly impressive applications for its open board position. It was close to impossible to choose just one. However, AFF is pleased to

announce that Liz Wilson will be joining the board at its fall meeting. In her application Liz wrote, "I came to recognize and appreciate the pride, passion and admirable ideology infused in the AFF. All of the involved family members and staff with whom I have come in contact have a refreshing conviction that they can make a difference - one person, one goal, one community at a time." Welcome, Liz! AFF's yearly board rotation begins next year when two new board members will be added. Please read Ann Williams' article on page 6.

After a great 75th anniversary celebration for the Julia Dyckman Andrus Memorial last year, we look forward to the 50th anniversary activities for Andrus on Hudson (AOH) this year. Please read the front page article by Lynne

Katzmann in this issue of *Concinnity* for more information about AOH.

On a closing note, Libby Andrus will be stepping down as the chair of the Surdna board in November. Working with her has been a fabulous experience, a true partnership filled with respect and helpfulness. I will miss working with her in her role as Chair but look forward to both continuing our work and friendship.

I hope you noticed the postcard requesting your feedback included with this issue of *Concinnity*. Please take a few moments to share your thoughts with us. It's a busy and exciting year ahead for all of us, and we look forward to staying in touch!

Kelly

THE GOLDEN YEARS OF CHANGE

by Lynne Katzmann

Former Board Member

Continued from cover

In the 1990s, the family elected to utilize government money to help support Andrus on Hudson so that it could diversify its philanthropy and serve a greater number of Westchester elders. As part of this diversification strategy, the board of the John E. Andrus Memorial formed a partnership with Beth Abraham Health Services and designed a continuing care retirement community to be built on the 26-acre Hastings-on-Hudson site. After a long planning period, the new development did not receive the needed local approvals. While disappointed, the board took stock and made the decision to reinvigorate the program within the existing environment.

In 2002, the board ended its relationship with Beth Abraham and began working with a former board member, Lynne Katzmann, and her company, Juniper Communities, to refresh and strengthen Andrus on Hudson. Seeking not only financial security but also to create a program that can serve as a model for successful aging, the board took a deep

breath and began to implement a plan to move Andrus on Hudson into the new millennium. The results have been rewarding and have provided further momentum to our mission-directed activities.

Understanding that Westchester elders seek a continuum of care and services as they age, Andrus on Hudson continues to provide a fine home for seniors who joined us in the earlier stages of their retirement. In addition, we have expanded our program so that people who need additional services and care can continue to live as comfortably and as independently as possible.

Following this theme of maximizing independence, the board and new management team began a program to attract individuals needing short-term comprehensive rehabilitation, enabling individuals to continue to lead full lives at home or with us at Andrus. The program, entitled "Short Term Rehabilitation for Body and Soul," is offered in conjunction with the world-renowned Burke Institute for Rehabilitation. We opened 50 freshly painted and newly decorated single rooms with private baths

in the new "Burke at Andrus" unit in July 2003. Today, the floor is home to more than 35 residents. While many of these individuals are with us for only three to six weeks, the activity among these residents has provided new life blood to the community. In addition, in April 2004 we opened another newly renovated floor for individuals who need assistance with the tasks of daily living.

The programming at Andrus on Hudson continues to provide the means for residents both living on campus and in the community to support their spiritual, educational, cultural, social, and recreational needs. With the tremendous support of the Helen Andrus Benedict Foundation, we have opened Andrus on Hudson to the community in so many ways. From our Concert Series on the great lawn to hosting the preliminary sessions for the upcoming White House Conference on Aging, to the development of walking tours highlighting our specimen trees and plantings to installing gallery space for local artists to exhibit their work, we are building a vibrant community that will serve Westchester well in years to come.

When we define success, we look not only at our ability to provide excellent care and service to the residents we serve, but also to build programs that model successful aging for the community in a financially responsible way. For the first time in 50 years, Andrus on Hudson is covering its operating costs. We are extremely proud of this accomplishment. It means that over time we can continue to provide and improve upon a healthy and enriched environment for those who live on our campus, as well as secure a solid foundation in the family's philanthropic initiatives for healthy aging.

This fall, in conjunction with the joint family board meeting, we celebrated our past, present, and future with a celebration. On Sunday, September 12th, we invited all of you to join us for a dinner commemorating John E. Andrus and his vision to provide rest and dignity to elders.

Lynne Katzmann, a former member of the board of Andrus on Hudson, is the President and CEO of Juniper Communities.

Annika Hawkins' Wedding, August 21st, 2004

Photography: Libby Andrus



1 Annika Hawkins, John E. Andrus, Caitlin Hawkins, Joey Hawkins, Julie Boger-Hawkins, Katie Andrus
2 Amara Andrus, Julie Andrus, Joan Andrus
3 John Hawkins, Julie Andrus

4 John E. Andrus III, Annika Hawkins
5 Steve Andrus, John E. Andrus III
6 Bride and Groom—Mike Johns, Annika Hawkins

Value(s) Added

The following vignettes from the lives of Andrus family board members—from Ohio to Rhode Island to Canada and beyond—demonstrate their commitment and involvement beyond regular meetings. Read on for inspiring stories of site visits, grantee meetings, and the personal impact of the transitions framework.



Mike Spensley

By virtue of having responded to questionnaires distributed by the Family Involvement Committee, I was invited in 2000 to participate on a Board Exploration Triad (BET) of the Andrus Family Fund (AFF). Our BET was comprised of Caitlin Boger-Hawkins, my 5th generation cousin; a non-family member expert in the field of foster care; and me. Our topic of exploration was the transition of youth from foster care to independent living. The year, representing my first significant experience in philanthropy, passed much too quickly.

What did that experience mean to me? I recognized and was inspired by the compassion of everyone involved in AFF and the BETs, the wonderful work of experts in the fields being explored by the BETs, and our potential to make contributions in fields in which more work and support were really needed. My BET experience was an educational, humbling, and richly rewarding experience...an exciting opportunity to be exposed to foster care, a field about which I knew very little. Learning about foster care from our BET's expert, herself a product of the foster care system, was an eye-opening experience.

I was and, frankly, continue to be somewhat overwhelmed at my appointment to Surdna's board. My BET/AFF experience was a good indicator of the opportunities to learn, become involved and, I hope, contribute to the wonderful work of our family's foundation.

Despite my relative inexperience in the field of philanthropy, board and staff were welcoming and eager to help me get up to

speed. I soon came to look forward to quarterly board meetings and interaction with my fellow board members and staff. I particularly appreciate the efforts of Ed Skloot and staff to inform and educate during the meetings. Beyond attending quarterly meetings and teleconferences, and reading about the programs and grantees, I have learned from and enjoyed participation in site visits with Program Directors. It's given me great pride to see the impact in the field of Surdna's programs, staff, and financial support and the extent to which they are appreciated and valued. I've learned much from, in particular, Ellen Rudolph and Robert Sherman, Directors of the Arts and Effective Citizenry Programs, respectively.

In April 2004, I participated with Libby Andrus, Ellen Rudolph, and Kim Bartosik in a two-day meeting of The Talented Students in the Arts Initiative (TSAI), in Miami. TSAI is a collaborative project between the Doris Duke Charitable Foundation and Surdna. Representatives from some 40 arts training institutions that had received grants from this collaboration, participated in the meeting. Arts educators came together to talk about what they as a group had done and needed to do to sustain themselves and what grantors might do to help sustain their work. It was a powerful experience to listen to representatives from the arts training institutions speak to one another and speak to the foundations about the impact of our support to the making and teaching of art. I was very proud to be with Ellen and Libby, representing Surdna, at this meeting. Ellen is highly respected as Surdna's Arts Program Director, for her knowledge of the field and for her ability to interact with grantees about their programs and facilitate their networking within the field.

How my involvement in Surdna led to my appointment to the board of Andrus on Hudson is a little less clear to me. Peter Benedict is a cousin of whom I'm very fond and with whom I've had a long, if somewhat interrupted, relationship. We chat and spend time together at the meetings. I was surprised and honored at his recommendation and request that I serve on the AOH board. This is another of the wonderful Surdna opportunities for which I am very appreciative. I know little about elder care, but I'm learning. I haven't

begun to scratch the surface. Even before I began to appreciate the significance of my education in the philanthropy, the attractiveness of AFF and Surdna for me was participation in meaningful work with Family—many of whom I did not know. Meeting and collaborating with family members, and simply getting to better know them better, has been a pleasure and privilege. There are so many dimensions to the field of philanthropy, and I continuously learn more. Throw your hat in the ring even if you know nothing about philanthropy. Learning and serving with our family makes it an even more attractive and powerful experience.

Mike Spensley is a 4th generation family member who lives with his wife, Nancy, in Kalamazoo, Michigan.



Kelly Nowlin

As a board member of the Andrus Family Fund, I have found many opportunities to participate outside of our quarterly board meetings. I had the pleasure of attending one of our Community Reconciliation grantees' conferences, hosted at Berkshire Farms (a grantee) in the Berkshires region of New York. This incredible opportunity gave me a first hand look at some of our grants in action and the chance to meet the many people implementing the work. Until this conference, I had found it challenging to understand fully the grant area of community reconciliation. I learned that many of our grantees have numerous challenges of their own in their work and that by coming together to share struggles, successes, and ideas, they can elevate their thinking and their strength in their shared goals. Participating in these discussions and listening to descriptions of their work helped me to further understand the issues surrounding community reconciliation.

My attendance sharpened my ability as a board member to evaluate grants in this area, and it has made a big difference for me in our board work. Without seeing the grantees' conference first hand, I would never have known that by helping to facilitate a network of

experts in community reconciliation, we are making a difference. As small as the steps may be, these conferences are truly beginning to form an "industry" in this AFF grant-making area, allowing our grantees, board, and staff to create resources to help us learn and build upon our much-needed work.

I also had the opportunity to accompany Kelly and Sabena to a meeting with the new Mayor and Chief of Police of Providence, Rhode Island. We met with them to discuss a potential police-community relations grant in Providence. Kelly and Sabena felt it was important to assess the city's buy-in to the process. Providence is close enough to me that I found it feasible to secure childcare for half a day and make the short drive to be a part of the discussions. Once again, having the opportunity to be a part of the process outside of our board meetings is truly enriching. I have a much deeper understanding and connection to the grant in discussion. I also had the chance to watch Kelly and Sabena in action, representing the Andrus Family Fund. They are amazing, and it made me feel even more secure and proud to be working with them.

Being a part of the "behind-the-scenes" work of AFF in different kinds of situations is not an obligation, but a privilege. It has deepened my understanding of our program areas and specific grantees and, in turn, has strengthened the kinds of contributions I can make to this board.

Kelly Nowlin is a 5th generation family member who lives in Hopkinton, Massachusetts.



Tim Thorpe

It was a privilege getting involved with the Andrus Youth Services Program (AYSP). To refresh our memories, AYSP is designed to introduce, encourage, and educate yet another generation to the wonderful world of philanthropy in an interactive manner. This program encourages Andrus family high-schoolers to select an organization with which to become involved, become involved and ultimately

submit a grant request. Aside from acting as a mentor to some of the kids involved, I have stayed close to the program through the involvement of my daughter, Molly, age 16. Her participation has allowed me to learn through her eyes as well as my own. Through program coordinator Nancy Zueling's and AFF associate Sabena Leake's tremendous time commitment and enthusiastic guidance, these young people have become involved with organizations located, for the most part, within their own communities.

AYSP originally established a mentor/mentee program, but, as in many adult/teen relationships, many teens chose to strike out on their own, keeping their mentor communication to a minimum. Nancy continued to provide the needed guidance to produce some interesting and thoughtful AYSP grants (see below).

Each grant has its own special meaning to the kids involved. In some cases, the young person volunteered for the organization as well.

I provided the kids with a piece I wrote for them called "How to Conduct a Site Visit." I suppose it's not surprising that I found the exercise to be extremely helpful to me as a great refresher course in how to run the site visits I regularly conduct for another philanthropic organization to which I belong.

These teenagers deserve a lot of credit for taking time out of their busy schedules to become and stay involved in this program—one that should remain and sustain itself as part of our ongoing initiative to educate incoming generations in philanthropy.

Another wonderful experience AFF afforded me was my visit to the Professional Association of Treatment Homes (PATH). PATH is a non-profit organization based in Minneapolis, with offices located in Minnesota, North Dakota, Wisconsin, and Colorado. The founders were a group of fos-

ter parents who felt that children with special behavioral, emotional, and medical needs could be better served in family-based foster care settings rather than more restrictive institutional settings.

I conducted a site visit to PATH to help evaluate the organization's potential. I was incredibly impressed with their skills and passions. Their Transitions program was developed to help 20 kids throughout various states by providing a stable of program managers to work one on one with each of the kids; the managers would work with the kids to develop their own Change and Transition Plan.

I receive various newsletters and annual reports from PATH. While it may be too soon to determine the true impact of the grant, I am so proud of our AFF board and staff when I see how PATH itself feels about our grant. When AFF appears in an article to its constituents, we are listed as one of the top three grantors alongside the Dave Thomas Foundation and the Otto Bremer Foundation.

Tim Thorpe is a 5th generation family member who lives in Minneapolis, Minnesota.



John Hawkins

None of this is simple and none of this is obvious. The causes of problems we seek to solve as Andrus family philanthropy board members are always complex and occasionally counterintuitive. The people best suited to solve them don't always represent large, well-established, and well-funded organizations.

Through Surdna's Environment program, we have funded outstanding work on transportation, land use, and community livability. I was fortunate this past spring to attend the annual meeting of the Funder's Network for Smart

Growth and Livable Communities in Vancouver, British Columbia. Vancouver is generally regarded as an example of how a city should work, with mixed use, vibrant neighborhoods, a diverse population, and comprehensive mass transit. Vancouver doesn't suffer from strip malls, traffic jams, and big-box stores because you can get everything you need in your neighborhood or easily use the transit system to go to the city center. How can this be? Are Canadians smarter than we are? "No", said the Canadians, "we can't deduct mortgage payments from our income tax." What does the deductibility of mortgage payments have to do with livable cities? It turns out that there is little pressure for bigger houses on bigger lots when there's no tax advantage, and thus fewer suburbs with fewer strip malls and more money available for mass transit, etc. Things aren't what they seem and solutions are frequently counter-intuitive. I doubt we'll be funding any efforts to repeal mortgage tax breaks, but many of the problems we work on have equally obscure root causes!

If I stopped there, I'd be doing some injustice to the complexity of these issues (and the issue of livability in particular). I live in a state, Vermont, which has been put, in its entirety, on the list of endangered places by the National Trust for Historic Preservation. The threat of additional Wal-Mart's—we already have four—is what sparked this decision by the National Trust to try to save Vermont's special character. If you're at all concerned about economic justice, you need to listen to the population of low-income Vermonters who complain that Wal-Mart is the only place they can afford to buy many of the things that the rest of us take for granted and expect to be able to buy, for more than they can afford, in our remaining picturesque and preserved downtowns. None of this is simple.

I have visited with, and listened to, many people over the past five years. The ones I remember best and the ones who influenced my own thinking the most are not the polished representatives of large environmental or arts organizations but rather the somewhat maverick founders or leaders of small organizations that work for such causes as environmental justice, student rights, or art in the community. Sometimes these people are immigrants to this country, sometimes they have thick, regional accents, sometimes they're so young you wonder if their parents know where they are, but they

are always intensely passionate about their work, have a vision of a better world that is truly inspiring, and make it clear that they are in it for the duration. Lest anyone worry, the successful among these passionate (and sometimes unpolished) leaders are invariably well organized and have great business plans! Again, it isn't simple and it isn't obvious.

Lastly, none of this learning counts for anything or leads anywhere without a great program staff and executive leadership, and I believe that we are blessed with both at all the family philanthropies!

John Hawkins is a 4th generation family member who lives in South Strafford, Vermont.



Peter Voorhees

For about two years now, I have been living abroad in Amsterdam, the Netherlands. Prior to that, I lived in New York City. When I moved, I expected that it might be more difficult to remain actively involved with AFF. While the distance has made it hard to participate in grantee meetings and other domestic conferences outside of regularly scheduled board meetings, I don't know that it has really limited my sense of involvement with AFF. (The main challenges to contributing more time to AFF seem to be the same as when I was in New York — family and work commitments.) I think this continued sense of involvement stems in large part from the fact that our board places a high premium on ensuring that all board members remain active participants and are able to be heard.

Given the distance, I've tried to stay involved outside of board meetings and committee conference calls in ways that are relatively immune to distance. For example, I've served as Treasurer of the board for a couple years and would like to think that I've been quite involved with the formation of our budgetary requests to Surdna and the monitoring of our expenditures following approval. On a personal note, being involved with AFF and attending regularly scheduled board meetings in New York has not only allowed me the satisfaction of participating in the great work we do, but has also allowed me to maintain a connection to family, friends, and my country that I often miss in living far away. I've found the connection so

AYSP Grants 2003–2004

Art Reach, Connecticut Children's Medical Center
Bird Rescue
Cherry Tree Club, Prince of Peace Lutheran Church
C.S. Mott Children's Hospital
Families in Transition
Gleaners Community Food Bank
Heifer Project International
Livingston Family Center
Mary Free Bed Hospital and Rehabilitation Clinic
Ozone for Teens
Sojourner Project
Southern Arizona AIDS Foundation

Chelsea Spensley
Christina Spensley
Tyler Pakradooni
Samantha Spensley
Julia Voorhees
Chad Spensley
Brenna Cote
Christopher Spensley
Patrick Spensley
Kaitlin Spensley
Molly Thorpe
Cale Cote

important that since moving I have yet to miss a board meeting (like most of my fellow board members for that matter)!

Peter Voorhees is a 5th generation family member who lives in Amsterdam, the Netherlands.



Cameron Griffith

Over the past year, I have had several unique opportunities to deepen my understanding of the work we are facilitating at AFF.

I was fortunate to have been able to participate in both conferences we convened this year for AFF grantees. The first was for community reconciliation grantees in August 2003 in New York during the blackout. In spite of the extraordinary circumstances, I was able to learn more about the exciting work our grantees are accomplishing, as well as hear about how they were using the transitions framework in the context of their own programs. In November 2003, I attended a similar conference for our foster care grantees. Indeed, it was remarkable to see how they were interested in, and expected to learn from, others' initiatives.

In September 2003, I represented AFF at the Environmental Grant-makers Association conference in Ottawa, Canada. AFF had recently joined EGA, and it was a good opportunity to see what other foundations are doing in a very broad field. It was also a chance to network and tell representatives from other foundations about our work at AFF. I was glad to have had some time to interact with Ed Skloot and Hooper Brooks, who were in Ottawa representing Surdna.

Personally, my most rewarding work associated with AFF comes during our board meetings. Being with my fellow board members over a weekend allows me to focus my undivided attention on our program areas and grantees. With a busy new job, I look forward to being in New York to discuss the grants docket and contemplate different aspects of our work without other distractions and demands. We often have stimulating presentations from our grantees. At the last meeting in April, Julie Stein, our Conservation Conflict fellow, presented some preliminary findings of five community reconciliation program case studies she is in the process of developing. Board

meetings are also great opportunities to catch up, and hear what fellow board members have been doing with their lives. In addition to the time we spend together in the board room, we frequently have meals together and go to theater during the evenings when we are in New York together.

It is clear that Surdna's goal of engaging the fifth generation of the Andrus family in the family philanthropy through AFF is succeeding. We are developing our own style of grant making. Being part of AFF has brought me closer to my cousins on the board and to the extended family.

Cameron Griffith is a 5th generation family member who lives in Washington, DC.



David Earley

A bit of background history about me will help explain how I came to join the board of JDAM, the Andrus Children's Center. I grew up in a family culture emphasizing that public service was everyone's responsibility, either through vocation or volunteer work. These issues, particularly relating to the environment and social justice, were common conversation at the dinner table, on vacations, and on drives to and from church.

The "keepers of flame" were my grandparents (Ernest and Margaret Griffith, grand-daughter of John Andrus) and my parents, all very active public servants in university, church, and environmental settings.

At 13, I was offered a job at the local gas station. Upon relating the exciting news to my mother she responded firmly: "That does nothing to make the world a better place, so, no, you can't work for a gas station." My response? I simply thought: "Oh, of course—she's right."

This led me to volunteering as an orderly in a local hospital. Although I rotated floors, I spent most of my time in pediatrics and infant ICR. Throughout my high school and college years, I also tutored inner-city students. I began college intending to become either a doctor or social worker. I hit pre-med courses, however, and bounced, pursuing a social work degree instead. During college, I did my internship at a local mental health center in Wooster, Ohio,

and worked there for 17 years after graduation. I worked mostly with adults, but also with some families and children. During my tenure, the severity of problems we saw increased dramatically. I began to realize that at the core of many of these problems were significant childhood traumas. I then made the conscious decision to work for an organization serving abused and neglected children, joining Boys Village in 1997 in my home of Wooster, Ohio.

It's a short trip from my life's work to my joining the Andrus Children's Center board. Before my involvement with AFF and JDAM, our family's family philanthropic programs frankly felt very distant to me, and I believe I wasn't alone in that. Fortunately, our Family Involvement Committee had begun to take steps to involve more of us.

I became involved with the formation of the Andrus Family Fund in 2001, serving on a foster care BET. This work gave me a close-up look at our family's work and piqued my general interest in our family. All of sudden, things my uncle Larry Griffith and cousin Edie Thorpe had been talking about for years felt closer to me! When the opportunity presented itself, I joined the board of JDAM in January 2004. Since that time, I have been impressed with the quality of the work done there, and the tremendous potential for JDAM's documented "best practices" to become national models.

Public service work for children, in my professional and volunteer life, is my ministry. The connection I feel to our family's work has now increased greatly, and I'm glad for it. Now I read Surdna annual reports carefully, instead of giving them only a 10-minute scan! I'm delighted to be able to merge my immediate family's public service mission with the philanthropic work of our whole family.

David Earley is a 5th generation family member, who lives outside Wooster, Ohio.



Peter Benedict II

While serving on a board such as AFF provides quarterly opportunities to connect with cousins and pursue passions related to the program areas of our Fund. I stay connected between meetings be-

cause the staff goes out of its way to keep me involved.

Specifically, I visited nearby Ohio three times to participate in the stakeholders' meetings for the Cincinnati police and community relations collaborative. These trips allowed me to gain exclusive insight into a new-democratic process for national conflict resolution and solidified my commitment to our community reconciliation program area. I tasted and felt every aspect of this grant as I participated, and was ultimately chosen, as a community-appointed and federally recognized participant in exercising a final vote for the collaborative agreement.

In addition, I was able to serve in a consultative capacity aboard an Ocean Classrooms' tall ship in Connecticut for a meeting of foster care agencies planning a collaborative grant. Again, I tasted and felt every aspect of this potential grant as I knowledgeably discussed the mission and resources of our foundation in relation to the experiential opportunity being presented. Not only did I learn to sail and become a crew member, I shared the passions of our Board and provided training in the transitions framework for Michigan foster care youth.

Kelly and his staff have insured that each of us is a contributor and involved member in this learning process. As Chair, I feel this has positioned us to be one of the most attuned Boards in our respective areas of giving. I have personally grown as a result of these experiences, right alongside my colleagues and our Fund. Thanks for the opportunity.

Peter Benedict II is a 5th generation family member who lives in Louisville, Kentucky.



Caitlin Boger-Hawkins

In recent years, I have had three opportunities to deepen my involvement in AFF. In spring 2002, I attended the first foster care grantees conference. The conference was a chance to meet and talk with multiple grantees individually. It also provided me a unique opportunity to listen to conversations between organizations which were both grappling with the challenges, and beginning to sense the value, of the transitions framework.

I also attended a site visit to Teen Empowerment, a grantee in Boston working on police/youth relations. This visit allowed me to meet not only the grantees but also a number of the young people and police officers involved in the project.

In June, I met with third-generation family members involved in the Tremaine Foundation. This group, which is designed to prepare members of the next generation for Board service, contacted AFF staff to ask whether a Board member would share information about their reasons for getting involved in family foundation work, their experience on the Board, and lessons learned to date.

Caitlin Boger-Hawkins is a 5th generation family member who lives Goshen, Connecticut.



Ann Williams

When we first met as a Board, we were asked to reflect upon our family's history and tell what brought us meaning. We commented on the Children's Home, not only because of the personal legacy of the orphanage, but also the support and recognition of the individual to become a fully functioning contributor of society. Somehow, we sought to do the same using philanthropy as the catalyst to create change on a personal as well as social level in our program areas. The Transitions Model by William Bridges seemed the best potential vehicle.

As a program area, foster care was a natural arena because foster care is the modern-day solution for children without homes. We further wanted to personalize this youth support within the family and thereby created the Andrus Youth Service Project. We want to encourage our teenage cousins in their individual thoughts and ideas while recognizing the strong culture of this age group.

Last year I went to our 3rd Annual Foster Care Grantee Conference and witnessed first-hand the cross-pollination of ideas as well as the application and on-going investigation of William Bridges' transitions framework in their work.

I have also been involved in the AYSF project and participated in Chat Room as well as telephone conversations. In this fourth year we hope to incorporate more of the transitions framework in the

youth's experience of philanthropy in their community.

Ann Williams is a 4th generation family member who lives in Berkeley, California.



Carra Cote

I am excited to take this opportunity to share with you the impact of the Andrus Family Fund on my professional and personal goals. As some of you may know, I have dedicated the past 8 years to pursuing a solid foundation in social services and child welfare policy. Recently, I decided to pursue another graduate degree—this time a Master's in Business Administration from the University of Pennsylvania (Wharton). My pursuit of an MBA in nonprofit leadership management is well-aligned with my long-term goal of directing an effective nonprofit serving children and families. However, my pursuit of this degree at this time is inextricably linked to my involvement with the mission and mindset of AFF.

My membership on the board of AFF has provided me with some of the most meaningful and substantive work of my professional life. I have found that our board work transcends the review of budgets, service delivery, and organizational outcomes. We have grown internally beyond our different career tracks and lives to become a community of stakeholders, unified in vision and commitment to each other to achieve success in our program areas. And I personally feel blessed to serve with family members in such an endeavor.

AFF also has impacted the way that I have come to understand change in my daily life. I frequently refer to the Transitions Theory to help ground me during periods of struggle, as well as use the Action Evaluation model to explain the what/why/how behind my actions. AFF has provided me with the rare professional opportunity to engage in such conscious and active reflection that my personal development has followed suit. I doubt that the depth of my experience is typical with regard to other family foundations. For that, I am grateful.

Finally, at the time of this writing in July 2004, I am looking forward to increasing my involvement with AFF later this month. I will travel to New York to meet with

Kelly, Sabena, and the Director of Michigan's Department of Social Services, a prospective grantee. In addition, on the following day, I will accompany staff and a number of grantees on a site visit on board a schooner that serves as an ocean-going classroom. I have heard from other board members how meaningful they have found these grantee visits, and I am excited to gain a more tangible understanding of grantor-grantee relationships.

I believe that I may speak on behalf of other board members when I say that we appreciate the unique opportunity to grow personally and professionally through service, leadership, and teamwork. Please feel free contact me at (215) 790-0337 if you have any questions about my experiences with AFF. I would be delighted to share them with each of you.

Carra Cote is a 5th generation family member who lives in Philadelphia, Pennsylvania.



Shari Wilson

When originally conceived, the community reconciliation program area was an umbrella for three areas of focus and interest by the Board: police-community relations, identity-based conflicts, and conservation conflict. During our first several years, grants have been made in all three areas. The Board, in reviewing our record to date, wanted to increase the number of grants in the conservation conflict area to be on par with the other two focus areas and more narrowly define—within the very broad topic of conservation—where the greatest needs for community reconciliation are.

As part of our efforts to further define opportunities, we are exploring the topic of environmental justice, meaning the fact that facilities that produce pollution, such as landfills or factories, are disproportionately located in poor minority communities. The federal government, states, environmental organizations, and civil rights organizations have long recognized this and undertaken many efforts to reduce, address, and prevent this injustice with mixed results.

To further educate our staff and ourselves, I arranged a meeting in April in Baltimore for Kelly, Sabena, and me to meet with colleagues in the environmental

regulatory and advocacy profession. We discussed how and where the greatest needs and opportunities might be identified for grant making to reduce environmental injustice and what role AFF could play in those areas.

Shari Wilson is a 5th generation family member who lives in Baltimore, Maryland.



Hamlin Pakradooni

When I first joined the board of JDAM, I was told that the commitment would be 7 meetings per year. With different committees and other events, it's become 3 times that. And it's been a delightful surprise! Several years later, my work for the children's center continues to be very rewarding. I look forward to the meetings and events and other opportunities to become involved.

The diverse nature of what the children's center does is what appeals to me most. We address children from birth through early childhood and carry that commitment into high school with an off-campus teen program. The main focus of the center is on the middle years until eighth grade.

I first became interested in JDAM because I had been involved in Big Brothers/Big Sisters in New Jersey. That was my first introduction to JDAM. When the opportunity for new board positions was presented to the family members, JDAM was the only one I was interested in at that point. I've been thrilled to be a part of the excitement at the center with so many new developments, such as the merger with the Center for Preventive Psychiatry (CPP) and other mergers currently taking place to make the center bigger, broader, and more robust. There's so much enthusiasm and growth going on right now. My primary involvement has been with the CPP merger. I've been on a task force putting together how both agency's boards will be integrated into the JDAM board.

My work with JDAM has been a rewarding experience from the start. The big commitment has brought great rewards for me.

Hamlin Pakradooni is a 4th generation family member who lives in Princeton Junction, New Jersey.

Doers

While I think I lead a pretty active life at age 35, **John Andrus III** (3rd generation) is nearly 60 years my senior and seemingly even more involved and busy! When we were finally able to connect by phone, we chatted for almost an hour, and I was impressed by his great energy, enthusiasm, motivation, and positive approach to life. It's clear that this outlook has been an essential part of his many decades of service and contributions to the public. When I asked him what public service meant to him, he said it's "an opportunity to give something back for all of the wonderful things that have happened in my life."



John Andrus III

I've never had the opportunity to talk with John before, but I learned a great deal about him in a short period of time. One of John's significant public service contributions was quite close to home, when he served on the Surdna Board of Directors. At the time he was elected Chairman of the Board, Surdna had no professional director, only one money manager, and a somewhat unpredictable giving history that might frustrate many fundraising professionals these days. With John's guidance, the Surdna Board hired Ed Skloot, developed the Foundation's four giving areas, and diversified their investments, taking the Surdna Foundation to a new level that allowed it to hire more staff, run more efficiently, and begin developing into a true, professionally run organization.

As a land conservation professional myself, I just had to ask John about his involvement with The Nature Conservancy (TNC). He laughed and tried to tell me that his membership on the national Board (and ultimately as Chairman) was not only serendipitous but that he was quite stunned when he was first approached to be on the Board. When he explained that it was through a close friendship with Wally Dayton on TNC's Board at the same time John was serving on the Surdna Board, I commented that while life is full of opportunities for each of us, the key is what we decide to do with those opportunities. It seemed to me that he took the opportunity to serve again, in a very different capacity, and ran with it.

John says it was "one of the most exciting connections I've ever had," and one of the most rewarding things he's done because of the people involved and the wonderful areas that TNC was helping to preserve. When I asked John who has been the most influential or inspirational person in his life, he quickly answered that it was Wally Dayton, because he had elevated the protection of the environment to one of John's top priorities. You can bet I was smiling a lot on the phone call. It was also very clear to me by the time we said goodbye that John is a fantastic people person because he's sensitive to others' motivations, emotions, and perceptions.

My next phone call was halfway around the world, to France! While much younger than John Andrus, **Patrick Cardon** (4th generation) has already lead a remarkable, interesting life. After growing up in Egypt, his family moved to New York. At age 18 and in need of a summer job, he decided to take a position at the Brooklyn Museum and pursue his passion in Egyptology. He was already hooked on museum work by then, and the rest is, well, history. Our conversation flowed between his own activities in museum work and how it's progressed over the years, to a philosophical discussion about the delicate balance between facts, their interpretation, and ways of presenting the two. It was a fascinating discussion about community, history, politics, and even how he often acts as a mediator in the communities he serves.



Patrick Cardon

Early on, rather than simply focus on gathering and interpreting information for the public (already a tremendous public service), Patrick realized that an even greater service would be to bring a community's history to them. His approach has been not only to return history to people at a local level, but to do so with as little interpretation, categorizing, and censoring as possible. By doing so, it opens the doors to greater honesty about a community's past, and then gives them the power to decide how to interpret and act on it.

Patrick's biggest passion since the early 1990s has been what he calls the "museum in the streets"

concept, an idea he developed and since refined while working in France. After being asked to join the board of directors of a French historical society, he was part of a discussion of how to bring more people to a local museum. Patrick spontaneously replied that "if we can't get the people into the museums, we have to take the museums to the people." The idea took hold, and blossomed into a full-fledged model that he has since trademarked, put into action in 32 towns in France, three more in the U.S., with four or five other prospective American towns. The model is simple, exciting, and powerful. Using a series of weather-proof panels with photos and text placed along historical pathways, Patrick has created an innovative way to tell a town's story through a self-guided walking tour.

In sharing with me how he chooses information to include on the panels, Patrick returned to our philosophical discussion and told me that his emphasis is to present each community with as much history from primary sources as possible and then let them "decide for themselves," rather than do the interpreting for them. What I found particularly interesting was when I asked him how a community handles historical information that is perhaps disgraceful or makes residents uncomfortable. Patrick quickly emphasized the need to place the community's discussion into a larger context, sometimes even at an international level, and recognize that while it is a part of their history, recognition is a form of apology in and of itself. He added that it's important to acknowledge and accept the past, face it in an appropriate manner—but then move on.

As we neared the end of our transcontinental conversation, Patrick wanted to emphasize his belief that each person has a special approach to public service and their contribution to society. He feels he has such a connection with museums that his contribution is to take what we know about the past to help explain why and how we live in the present, and then figure out how to live a better future.

My last phone call was with **Lucy McKee** (5th generation), who lives in the beautiful town of Boulder, Colorado. Like my other two interviews, this one was lively,

eye-opening, and heart-warming. Lucy's history of public service goes back as far as she can remember, and was heavily influenced by her parents, in particular by her mother, who "sat on every type of volunteer board imaginable." Seeing this and so many other role models in her family that focused on caring for others, she said, was simply part of her development as a child.



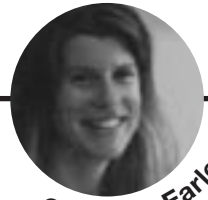
Lucy McKee

Considering this, it's not surprising that Lucy has been volunteering since she was 12! Starting at the Hillcrest Nursing Home as a blue striper, Lucy volunteered by wheeling patients around to meal and appointments, visiting with them in their rooms or taking them on walks, and doing arts and crafts projects with them. Seeing the joy that she brought to each of them was unforgettable to her, and along the way she gained self-esteem, confidence, and the knowledge that she was able to bring happiness to others. As a teenager, she shifted to rehabilitation work with disabled children at the Courage Center, where her volunteer work broadened to include water therapy and bringing encouragement and just plain fun back into these children's lives.

I wondered how she moved from rehab work to massage therapy, her current career. Lucy credits her father and his mother with bringing the gift of massage into her family (in return for walking on his back each day!) For a while, though, Lucy pursued a corporate career, but after tiring of corporate America, she decided to go after the thing she had loved the most all along—massage therapy—and went back to school. Not only did she open her own massage practice in California, but she interned at the California Pacific Medical Center, ultimately becoming certified for medical healing massage. While I was impressed merely by Lucy getting her own private practice off the ground, I was even more impressed by how she was able to also include volunteer time at the hospital doing work in the intensive care, oncology, and labor and delivery units.

I asked Lucy what it was like to do medical massage therapy. Her answer? "Very powerful."

by **Christine Earley**



Christine Earley

She was there to help create an environment where patients didn't have to be afraid, help bring them peace during their last days, and give them a chance to reclaim some control in their life. While clinical statistics show that recovery time is quicker with patients that benefit from medical massage therapy, I was still fascinated that this service was even offered at the Pacific Medical Center.

After moving to Colorado, Lucy promptly investigated Boulder Community Hospital's massage program. When she learned that

the program only accepts students under contract from the Boulder School of Massage Therapy, she was undeterred, knowing there was still a volunteer role for her to serve. Ultimately, she went back to her childhood roots and has volunteered in labor and delivery units, ER, and the sports medicine rehabilitation hospital.

I was having a hard enough time keeping track of all Lucy's volunteer work, but when she told me that she still maintains her massage practice in San Francisco, has begun another massage therapy

practice in Boulder, and has just opened a third office in Minneapolis, I began to get a bit dizzy! Her strong connection with people is more than evident, and her passion for helping them, whether they are children or the elderly (and whether she is getting paid for it or not) comes through loud and clear. She is currently taking a much-needed break from volunteering at the Boulder Community Hospital. Next up on her list is volunteering at the Boulder Hospice. I'm sure she won't stop there, though, because when I asked her what her dream for the future was,

she answered that it will probably have something to do with assisting women and children in a third world country, even if it's a long ways off in the future. Volunteering, she said, is about being so fortunate that she can do something to give back. Whoever she works with next will be lucky indeed.

Christine Earley is a 5th generation Andrus cousin living in Lakewood, Colorado. She loves her job working for a state-wide land conservation organization, and gets into the mountains as often as possible.

In the news



Libby Andrus—Surdna Chair, Carra Cote—AFF Board, Steve Kelban (Kelly)—AFF & AFPP Executive Director

A VIEW FROM THE MAST

by **Carra Cote**

As many of you may know, the Board of the Andrus Family Fund (AFF) meets quarterly to review grants in our program areas of foster care and community reconciliation. We analyze each potential grantee with a special focus on the transitions—emotional, physical, spiritual, and mental—that affect vulnerable populations and communities. This past May I had the opportunity to undergo my own transition in grant-making when I met with the Director, coordinators, and program administrators of a Michigan-based foster care grantee.

The Children's Resource Network Inc. is a private nonprofit organization with close connections to the Michigan child welfare agencies. In this grant, the Children's Resource Network has developed a unique partnership opportunity with private companies and the state government to transform the way in which Michigan foster care youth transition out of state care. Rather than age out of the foster care system with little training, Michigan youth will now have a new opportunity to participate in intense residential academic training and receive job skills to support their independent living.

I viewed the grant as a successful collaborative that was well within my comfort zone of traditional, effective service approaches to child welfare. And then I went for a site visit to the ship in the New York City seaport.

Removed from the board and conference room where we discussed program logistics, I gained a deep understanding of what the Program Coordinator meant when he passionately explained that the youth participate in a four-month, sea-based program that offers academic training while aboard a 130 foot sailing ship. I sat with Libby Andrus, Surdna board member, in the inner hull of the sailing ship and learned how the approximately 20 youth, many of whom have never been on a ship, become excellent seamen in the 4 months. Furthermore, many of these young people have completed the program and consider professional seamen positions with partnership organizations, such as the U.S. Coast Guard or the National Guard. Most importantly, I watched a dedicated crew explain how the young people gain confidence and self-esteem, often for the first time, through the teamwork, responsibility, and interpersonal skills developed on board.

I'll admit that the small bunks, no showers and pump toilets intimidated me during the morning (let

alone 4 months at sea) but the program has its merits. Ocean Classroom and the Children's Resource Network have created a successful partnership to attack creatively the behaviors and mindsets that defeat so many foster care youth. The program combines traditional psychological theories with innovative life skills training; the collaborative builds on the strengths of the public and private sectors. Through this grant, AFF has continued to use grant-making strategies that support effective, innovative, multi-dimensional service delivery. I am excited to share the exciting work of AFF and the news of this Michigan grant.

Carra Cote is a 5th generation family member and an AFF Board Member. She attends the Wharton School, University of Pennsylvania, where she is pursuing her MBA in Nonprofit Leadership Management.

TREMAINE FOUNDATION

by **Caitlin Boger-Hawkins**

On June 5, 2004, I had the opportunity to speak at the Annual Associates Meeting of the Emily Hall Tremaine Foundation, a Meriden, Connecticut-based foundation that makes grants in the areas of contemporary visual art, environment, and learning disabilities. Members of the third-generation associates program—which is designed to prepare members of the next generation for future board service—were interested in hearing about the experiences of other family foundation board members. They had invited AFF to attend their meeting. Their associates were curious to hear about why others choose to become involved in family foundation work, what others have expected to gain from their work, and what lessons have been learned as a result of being involved.

Over lunch, I provided a brief background of Surdna and the Andrus Family Fund, outlining the Foundation's history and the creation of AFF in 2000. The associates in attendance, who ranged in age from 16-35, asked a number of thoughtful questions about my experiences as a board member. Many of the challenges their group currently faces, such as setting a grantmaking agenda and developing a system and style of governance, are ones that AFF has also addressed over the course of its development.

On a personal level, a number of the associates are grappling with issues that individual AFF board members have also experienced, such as the challenges of balancing the time commitment required by board involvement with the demands of careers and/or young families. Finally, because the Tremaine Foundation associates are, like AFF board members, members of a larger extended family, we were also able to discuss the unique joys and challenges presented by working with cousins.

I hope our conversation provided the Tremaine Foundation associates with some insights into involvement in a family board from the perspective of a peer. I am grateful for the opportunity it provided me to reflect back on the past four years. I'm so proud of what AFF has accomplished and feel very fortunate to have been a part of its good work.

Caitlin Boger-Hawkins is a 5th generation family member. She lives in Goshen, Connecticut with her husband and two young children and works in community college administration.



Caitlin Boger-Hawkins

Happening at...

Surdna Nonprofit Sector Support Program



by **Vince Stehle**
Program Officer

The tension in the room was palpable. At the Second National Business Plan Competition for Nonprofit Organizations—a project of the Yale School of Management and the Goldman Sachs Foundation funded by the Pew Charitable Trust—three out of four grand prizes had already been announced and any of the 20 finalists could win the last award of the night. So it was a real thrill and another big win for Surdna grantees when VolunteerMatch was awarded a top prize worth \$100,000.

Last year, Surdna grantee CompuMentor won a grand prize in the Yale-Goldman Sachs competition for its plans to create a product donation service that delivered hundreds of millions of dollars worth of free and deeply discounted computer products to nonprofit organizations. During CompuMentor's victory celebration, a friendly call was placed to our friends at VolunteerMatch, challenging them to compete in this year's competition. And compete they did.

Both CompuMentor and VolunteerMatch are based in San Francisco, but their services reach across the country. CompuMentor offers direct technology consulting services to nonprofits in the San Francisco Bay Area, but its most far-reaching work is delivered over the Internet through its information service and product donations

program, TechSoup and TechSoup Stock. Likewise, VolunteerMatch is the premier location on the Internet for individuals to find volunteer opportunities and for nonprofits to find dedicated volunteers. These two organizations are quintessential Nonprofit Sector Support Program (NPS) grantees, serving the technology needs of a diverse group of nonprofits.

The NPS Program has, from its inception in 1998, focused considerable attention on information technology projects for nonprofits. The program seeks to strengthen the effectiveness of nonprofit institutions and to promote increased and improved philanthropy through a wide range of projects.

Providing access to affordable technology has been a signature element of the program as nonprofits often lag behind commercial enterprises in their adoption of technology solutions for organizational management. Surdna has supported many of the leading players in the field of nonprofit technology; among them CompuMentor and VolunteerMatch.

There are several other organizations that also serve the basic technology needs of nonprofits in addition to CompuMentor and VolunteerMatch: Network for Good, an online portal that brings together a wide range of tools and resources, both for the gen-

eral consumer interested in volunteering, donating, and learning more about nonprofits, as well as for nonprofit organizations that seek professional tools for online philanthropy; the NPower network, a national network of local technology assistance providers; the Nonprofit Technology Enterprise Network (N-TEN), a national service organization representing the field of nonprofit technology; and Groundspring, a nonprofit enterprise that provides online giving tools to other nonprofits.

One place to find out more about these groups, including VolunteerMatch and CompuMentor, is at www.surdna.org/techfolio, a section of the Surdna website that showcases several of our technology grantees. Surdna's Techfolio is a joint marketing project that seeks to bring added attention to the respective groups. The effort is designed to help the organizations reach more clients and to make it easier for nonprofits to find quality technology services.

At Surdna, support for key technology providers has been a team effort. As Program Officer overseeing the portfolio of technology investments, I have the most direct contact with our grantees. But several other members of the Surdna family have contributed important guidance. Jonathan Goldberg, resident technology maven as well as the Foundation's Grants Administrator, is consulted frequently

to help assess the merits of technology proposals. Surdna's Executive Director, Ed Skloot, has always maintained a strong interest in and a keen eye on management challenges facing these groups, with a special role in urging CompuMentor to complete a business plan for TechSoup back in 1999 when the group first came to Surdna for support.

Likewise, when VolunteerMatch first approached Surdna, Fred Moon—then chair of the Board—saw the opportunity to fast track a relatively large grant that helped the fledgling organization survive and go to scale. And on an ongoing basis, John Hawkins, former Director of Academic Computing at Dartmouth College, provides a sharp eye in reviewing technology dockets. All in all, when Surdna technology grantees compete, whether it is in the marketplace for clients and customers, or in high profile business plan competitions, they are backed with a strong supporting team at the foundation.

Coastal Enterprises, a grantee of Surdna's Environment Program, also won a grand prize award and United Homesteading Assistance Board, a past grantee of the Community Revitalization Program, picked up a \$25,000 prize as a runner-up in the competition.



by **Ann Williams**
Board Member

Andrus Family Fund

The Andrus Family Fund's (AFF) first scheduled board rotation begins in 2005 and continues in each subsequent year. Cousins ages 25-45 are eligible to apply for these annual openings. Board terms are 3 years long with one additional term possible. The process begins when the Family Involvement Committee, of the Surdna Foundation, and the Nominations Committee of AFF send out a call for applications to all eligible family members. I want to encourage all cousins to take advantage of this incredible opportunity. I thought cousins might find it useful if I used this space to share some of my experiences about applying for and participating in AFF.

About eight years ago I received a questionnaire from our Andrus Family, asking me questions about my professional life, my relationship

to philanthropy in my own personal life, and whether I would be interested in any family philanthropy opportunities. I hesitated to respond at the time because I was 41, had just had my first and only child, Henry, and had just made the choice not to return to work after my three-month maternity leave. The company I had worked for, an alternative energy company (wind turbines), was going bankrupt but they had not eliminated my position – yet. I did not feel like I was cream of the crop material for the family selection process, but I filled out the questionnaire largely because my professional life had previously been dedicated to non-profit organizations.

Fifty cousins filled out the initial questionnaire and 30 of us went to NYC in January to explore possible philanthropic opportunities with

the Andrus entities— including the possibility of a new fund—through presentations, discussions, and breakout groups. One group reported that passion seemed to be the key to a successful course for a new fund. Passion was probably the one word many were hoping not to hear. Too unreliable, too impulsive, too unyielding, too persuasive, too, too, too... Still, the Surdna Board and the Family Involvement Committee forged ahead, and eight cousins were chosen to initiate the Andrus Family Fund. Some of us knew each other's names, some of us are from the same geographic area, some of us are from the same branch of the family tree, but mostly we were eight cousins put in the same room at the same time with an Executive Director, an Associate Program Officer, and an Administrative Assistant. We were to roll up our sleeves and get to work.

The most amazing part of all is that we did. We have worked seriously, diligently, and with great passion from the very first evening we introduced ourselves to one another. We were asked why this opportunity meant something personally to us and we have carried this meaning to every meeting ever since, including the addition of four more family members, making us twelve. Themes from that first meeting remain evident in our work today and are rooted in our family history.

The most significant theme was FAMILY, no surprise. Recognition of how much our own nuclear "Andrus" family means to us; gratitude for the extended family and how much we have received from being a part of this large family; respect for this man, John Emory Andrus, who made this great fortune from which the five

family philanthropies are made possible; acknowledgment of the privilege we have each had in our lives; and, in particular, a gathering of the stories that begin in JEA's childhood and move through the generations of cousins that eventually lead to all of us around the table.

Another theme reflected in our work is support of the individual. AFF is 12 cousins and three staff, each with an individual voice, individual expe-

rience, individual area of focus and expertise, and each with equally passionate dedication to the quality of our work together. Our program areas reflect our Andrus past as well as all our present lives: From Foster Care to Independence and Community Reconciliation. Please visit our website, www.affund.org, or request a copy of our report and guidelines to see where we have funded. One key aspect of our work that helps to keep our work "alive"

and is the source of why we work so well together is the process of "Transition" that we fully incorporate into all we do. The way in which this "Transition Framework" specifically influences us and our work is through a process that embraces the unknown, navigating through the chaos of feelings caused by change until there is enough experience on which to build a new beginning. For a more detailed explanation of the "Transition Framework" please refer

to our website or read any book by William Bridges, who developed the framework.

Again, I want to encourage all cousins to fill out the family questionnaire when they receive it in the mail. My service on the Board is deeply meaningful and continues to excite and shape my life and my work.

The Julia Dyckman Andrus Memorial



by **Hamlin A. Pakradooni**
Board Member

Like the weather in New England, the Julia Dyckman Andrus Memorial (JDAM) is constantly changing. Last year marked the retirement of our longtime CEO Gary Carmen. Nancy Ment stepped up to the plate to provide a seamless transition in the management change. Not only has she kept the very successful organization on track, but she has also added new meaningful direction in many ways.

On campus, we continue to provide excellent services to severely emotionally disturbed children through residential programs as well as through our "three-time" Blue Ribbon School. Furthermore, our

Diagnostic Center is second to none in its ability to accommodate the short-term needs of seriously emotionally disturbed younger children. The residential facility, school, and diagnostic center are all aimed at providing excellent care for children with the ultimate intention of enabling the children to return to their own homes.

As a highly recognized and successful childcare provider in Westchester and surrounding communities, JDAM has been called upon by many other organizations to help complete their missions. One such organization, The Center for Preventive Psychology, has nearly completed their merger

with JDAM. CPP primarily provides psychological counseling to children and families who have undergone emotional trauma. For nearly two years, we have been providing CPP with management and guidance, and have successfully assimilated their organization into JDAM. At this point the actual merger is simply a matter of formality.

Another organization, Family and Community Services of Westchester, is also actively involved with a merger into JDAM. As their name suggests, FCS provides a multitude of services for families in Westchester, and is felt by all to be a natural addition to JDAM. Incidentally,

both organizations are delighted to becoming part of the Andrus Children's Center umbrella.

I could go on and on discussing the many new facets of JDAM, but rather than that, let me simply say that the JDAM organization currently serves nearly 3,000 children and families, and will continue to grow as long as there are children in need of help with severe emotional problems. As a final note, on November 18, we will be having our annual Best of Westchester Award for Service to Children Dinner. Please call JDAM for details.

Helen Andrus Benedict Foundation



by **Fredrick F. Moon III**
Board Chair

As many in the family know, the Helen Andrus Benedict Foundation was created in 1998 to support programs in Westchester that encourage older adults to stay active in civic and community life. Being 'place based' in our funding approach has created opportunities that national and regional funders (like Surdna and AFF) don't have. Past updates here have focused on actual grants made. This one will highlight the processes we have used as a foundation with narrow program guidelines and a focus on a single place, Westchester County.

First, we wanted to build on nonprofits within the community to leverage our work. We collected information on all community resources that we felt were amenable to assisting us in changing the perception of elders as needy to being seen as assets to the community.

Next, we carefully chose nationally known and respected field builders to provide technical assistance and training in the community. They brought a quick infusion of cutting-edge knowledge. Their speaking events drew the attention of the local media, laying the groundwork for the changes we sought to create. With local support, we helped the field builders work effectively within the community by arranging bus tours and interactive conferences where the experts and local people got to know each other and the issues each faced.

We soon thought intergenerationally. The characteristics of communities that embrace the notions of healthy aging are also apt to support programs that aid in children's health and well being. HABF funding of intergenerational programs has been a winning strategy for people of all

ages. We have partnered with the Westchester Community Foundation and United Way to extend the reach of this intergenerational work.

In addition, we have hosted grantee meetings two or three times a year as forums for education, networking, and information sharing, as well as opportunities to build enthusiasm and a sense of community partnership among our many grantees. Programs built around a shared vision have maintained momentum and direction through the meetings we have convened.

We have worked to position the community, its leaders, and our programs on the aging, for success and excellence. We have been mindful of opportunities to tell our story regionally or nationally, in articles and at national conferences, resulting in positive feedback getting back to the

community and generating further enthusiasm.

Finally, we have worked to develop an awareness within the community that we are with them for the long haul. While many funders chase new ideas geographically, a place-based foundation's success depends on its continued presence within a community. We provide technical assistance of all kinds, continue to link people together, and are ever attentive to leadership issues, supporting people coming into executive roles, and being mindful of transitions under way.

As ever, all the Andrus family directors on the Helen Andrus Benedict board would be pleased to speak with any and all on the work of the foundation.

Andrus on Hudson

See cover story, continued on page 3

by **Lynne Katzmann**
Former Board Member

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Andrus on Hudson

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Staff Profile: Hooper Brooks (Surdna)



Jennifer Kasoff

by Jennifer Kasoff

AFPP Editor

Hooper Brooks, Program Director for the Environment at the Surdna Foundation, is a



Hooper Brooks

man of passion. His lifelong commitment to environmental sustainability has culminated in his thirteen-year tenure at Surdna, where he currently directs about \$7 million in grant making each year to organizations working on transportation, energy, biological diversity, and urban/suburban land use issues throughout the United States.

His entire professional career has been spent in the environmental field, beginning with a degree in Landscape Architecture from the Harvard Graduate School of Design. He describes his graduate studies as “a regional planning degree, with a focus on the ecological base of large-scale planning and environmental sensitivity for planning.” His interest in large-scale landscape architecture could have led him toward designing golf courses. But Hooper wanted something different, something that reflected the inter-connectedness of design and planning. Given the time and money, he says he would have continued on to law school because lawyers end up doing a lot of design through zoning laws. (And he’ll happily explain why this translates into a lot of poor zoning, if you ask.)

Instead of designing golf courses or going to law school, Hooper became the Executive Director of the Brookline Conservation Commission, the town official responsible for environmental and open space protection in a suburb of Boston with more than 56,000 residents. The agency was started in the 1960s, but staff members, including Hooper, were not hired until the 1970s. In this role, Hooper did everything from

urban land acquisitions (proving you could still protect the environment in urban areas) to running Earth Day to land conservation and land trusts to educational programs for schools.

After serving the town of Brookline well, Hooper decided to seize the time that so many of his peers had done earlier in their lives to travel the world. He took one and a half years off to travel in Asia. He describes this travel time as a “moment in history to see places that wouldn’t be open in the future.” Talking about his travels now, with decades of distance, Hooper says that traveling in Afghanistan, Russia, and other countries was as important for him personally and educationally as a life motivator as anything else he’s done. The sense of purpose Hooper discovered on the road still drives him today. Seeing extreme poverty, crowded living conditions, and a strong military presence in various countries helped shape his professional and personal outlook. He says he still uses his travel experience as a sounding board for his work now.

In his own words: “Travel gave me a sense of world. I couldn’t be a passive observer. It made me certain I wanted to come back and get to work. It was the right moment for me to leave. I started a journey, and I felt that everything that has happened to me since then has been about taking the journey and seeing where it leads you, not just taking the steps to get where you want to be. It was the beginning of taking risks for me. It opened me up to a set of values that were in my mind and head and made me realize what I wanted to do. I didn’t really want to do traditional business or law because I felt these fields didn’t touch the world or help the larger issues, only the people you worked for.”

When Hooper returned home, he became the Development Director for the Boston Natural Areas Fund, an open space preservation and management assistance organization. In 1981, he moved to New York City (leaving his New England home) to join the Regional Plan Association, serving as Vice President from 1989 to 1991. There, among other things, he conceived and directed a multi-year regional open space program. He also directed the Gateway Citizens Committee and helped to establish the Friends of Gateway to advocate for adequate funding and planning of the Gateway National Recreation Area.

In 1991, Surdna was lucky enough to hire Hooper to run its new environmental program. The Board of the Surdna Foundation had created the program two years earlier, but hired Hooper in 1991 to run it and put the pieces together into a strategic, coherent whole that merged the Board’s interests with Hooper’s professional background. Hooper sees the progression to his role at Surdna as a natural one. From land conservation to natural resource protection to regional plan work, his professional life has always been about thinking about the world in a systemic way—how land, buildings, and the environment we live in are inter-connected. His work at Surdna reflects this systemic approach.

The overall goal of Surdna’s environmental program is to work on long-term issues with deep involvement, ensuring that there are other funders in the areas the program funds to create collaboration. To get to know grantees well, Hooper spends time on the road getting to know people where they are, to understand the specific political and geographic contexts of specific projects.

When asked to highlight a few current areas of focus, Hooper spoke passionately about fisheries management in the U.S., pointing out that despite the work of dedicated organizations, “we’re still not getting ahead of the over-fishing that’s going on, but we have held the line in some places.” New federal recommendations need to be met with bold actions, “getting beyond business as usual.” Hooper sees the current atmosphere as a “moment to begin the process to break into a new paradigm” that would allow very different ways of approaching this pressing environmental concern.

Transportation reform is an area where Hooper sees that Surdna’s work helped make great progress in the 1990s. Federal legislation has moved toward a focus on different ways to improve mobility, beyond the use of cars. It’s a long, slow process, he says, but federal changes since 1991 demonstrate that progress has been made. These are but two of the areas in which Surdna invests under Hooper’s intelligent direction.

In addition to his professional responsibilities, Hooper is a co-founder and former Chairman of the Management Board of the Funders’ Network for Smart Growth and Livable Communities. Surdna was one of five funders who decided that the funding community needed to come together to create a learning group on this issue. More than 100 foundations—not just environmental funders—participate.

Surdna is indeed lucky to have a man as passionate about his work as Hooper as Program Director for the Environment.

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This issue of *Concinnity* was edited by Jennifer Kasoff.