

ARTS & CULTURE

CHILDREN

EDUCATION

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OLDER ADULTS

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STRATEGIC  
PHILANTHROPY



## ABOUT VIRGINIA G. PIPER



Virginia G. Piper Charitable Trust honors the commitment of Virginia Galvin Piper in supporting organizations whose work enhances the lives of people in Maricopa County. Following the philanthropic example of her first husband, Paul V. Galvin, the founder of Motorola, Mrs. Piper wrote, “For me, managing the stewardship of charitable giving is a moment to moment dignified responsibility of a truly high calling in human affairs and human relations.” Moving from Chicago with her second husband, Kenneth M. Piper, Mrs. Piper lived in Paradise Valley, Arizona, for the last three decades of her life and quietly but steadily worked to strengthen Phoenix-area nonprofits. Following her death in 1999, the Trust received approximately \$600 million, becoming one of the 100 largest foundations in the United States.

### MISSION

Virginia G. Piper Charitable Trust is a private foundation honoring the philanthropic legacy of Virginia Galvin Piper to enhance and strengthen the quality of life for the people in Maricopa County (Arizona) through support of arts and culture, children, education, healthcare and medical research, older adults and religious organizations. By investing in nonprofits and encouraging strategic planning for the future, the Trust strives to make Maricopa County—a region that includes Phoenix and is home to nearly 4 million people—a stronger, healthier and more livable community.

## STRATEGIC PHILANTHROPY

Virginia G. Piper Charitable Trust works side by side with nonprofit and community partners openly and collaboratively. This hands-on approach focuses on solutions and uses various strategies:

- Making investments in nonprofit organizations whose work improves the lives of Maricopa County residents.
- Helping nonprofits through education and expertise move to a new level of effectiveness and stability.
- Becoming part of the fabric of the community not only as a grantmaker but a community leader committed to fostering constructive change.

### STRATEGIC GRANTMAKING

Reflecting Virginia Piper’s own grantmaking, Piper Trust uses six Core Program Areas to focus the foundation’s efforts: Arts & Culture, Children (Early Childhood and Adolescence), Education, Healthcare & Medical Research, Older Adults and Religious Organizations.

*Competitive grantmaking.* Piper Trust conducts rigorous competitive grantmaking. Program, evaluation and communication staff work closely with potential grantees to ensure that projects are focused and meet longer term needs.

*Initiatives.* Piper Trust funds initiatives specifically identified to accomplish program goals. These projects can bring national program models to Maricopa County or draw together nonprofit partners to forge strategic collaborations for long-term, communitywide impact.

*Evaluation.* Piper Trust evaluation staff provide grantees with evaluation consultation and research tools. The focus is on what grantees want to know to make their programs successful. The Trust also evaluates its own effectiveness in working with grantees.

### NONPROFIT ASSISTANCE

Piper Trust invests in fostering leadership and strengthening organizations. The Trust provides resources for grantees ranging from grant development and program consultation to marketing, technology, board development and strategic planning grants. Piper Trust also sponsors Piper Academies on various nonprofit topics and the Piper Fellows Program to provide sabbaticals for nonprofit leaders.

### COMMUNITY LEADERSHIP

Piper Trust strives to be more than a grantmaker by convening groups to address community issues, bringing national thought leaders to meet with nonprofit executives and fostering collaboration among foundations. The Trust opened its offices in 2000 with a series of Community Conversations and continues to serve as a leader and partner in setting the course for the future of Maricopa County.

**ARTS & CULTURE**



**BACKGROUND**

Healthy communities have vital arts and culture. Piper Trust’s history of giving to Arts & Culture recognizes national and local trends. Nationwide, traditional audiences are aging and declining in number; new audiences must be identified and recruited. Locally, Phoenix has a young arts environment, and arts and culture organizations are notably underfunded compared to other major metropolitan areas.

**STRATEGY**

The Trust developed its key grantmaking strategies to assist arts and culture organizations in becoming stronger. The Trust does not underwrite individual performances or events, and does not make artistic judgments in deciding which organizations to fund. The Trust supports both well-established arts and culture organizations and smaller, community-based groups.

*Strength through building organizations.* Piper Trust focuses on developing arts and culture organizations by improving financial stability, marketing, planning and leadership.

1. Financial capacity through cash operating reserves, marketing to increase visibility and sales, fundraising efforts and endowments.
2. Enhanced business operations through grants for business and strategic planning, technology, training and management development.
3. Capital project grants.

*Strength through collaboration.* The Trust works to form specific initiatives to foster collaboration among arts and culture organizations as a way to promote efficiency and cross-fertilization. Through funder collaboration, the Trust has sponsored significant research to measure the impact of arts and culture on the community and has provided funding for a major initiative, Maricopa Partnership for Arts and Culture, designed to advance arts and culture in the greater Phoenix community. Another Piper Trust initiative, Alliance for Audience, addresses collaborative arts marketing.

**PIPER 101 PUBLIC INFORMATION SESSIONS**

Piper Trust holds an information meeting each month to explain the Trust’s approach to grantmaking. These informal workshops provide information about the grantmaking process, grantmaking priorities, proposal components and grant review and decision-making. The Piper 101 sessions are designed for organizations that have little prior knowledge of the Trust and allow potential grantees to hear directly from Trust staff about guidelines and how to apply. Because these sessions are interactive, space is limited and registration required.

**CHILDREN**



**BACKGROUND**

Piper Trust encourages the healthy development of children from birth through adolescence. The first few years of life are critically important to the healthy development of children, and young children whose needs are unmet can suffer severe and long-lasting consequences. At the other end of the childhood spectrum, adolescence is an important transitional period to adulthood, a time to acquire skills for a productive future or a time when negative influences can jeopardize their well-being and future success as adults.

**STRATEGY**

Piper Trust focuses on early childhood and adolescence, with an emphasis on helping parents and caregivers of these children. The Trust funds programs targeting prevention rather than short-term intervention projects whenever possible. Grantmaking in this category dovetails with objectives and strategies for children in the Education program area.

*Stronger families.* Piper Trust helps build parent and caregiver abilities to nurture children. The Trust supports programs to provide information about healthy early childhood and adolescent care-giving practices and improve access to basic support services and programs that strengthen families. A major Piper Trust initiative is the Arizona Parents Kit, an education program for new parents developed in California and then piloted and implemented in Maricopa County through distribution at birthing hospitals.

*Essential services for special populations of children.* Piper Trust supports programs to remove barriers that inhibit children of all ages from learning and growing by expanding access to

essential services such as food, clothing and shelter for children and their families. Grantmaking targets special populations such as disabled, at-risk, low income and homeless children.

**PIPER 201 GRANTEE CONTRACT SESSIONS**

Piper Trust program directors meet with grantees after grants are awarded to review contractual responsibilities, the Trust’s expectations and Trust support services. The chief executive and board chairman of each grantee organization attend the meetings so that both the executive and board have a clear understanding of requirements. At these meetings, grantees also learn how the evaluation, communications and finance departments can help them in their projects. Grantees find these meetings stimulating and even productive for collaborating with participants in the same fields and across program areas.

*Improved child care practices and after-school care.* Piper Trust supports programs to provide young children with quality care and safe environments, such as standardized orientation training for child care center personnel as well as similar support for at-home child care providers. Programs for youth and adolescents include funding after-school facilities and expanding access to out-of-school mentoring and skill-building opportunities.

**EDUCATION**



**BACKGROUND**

Establishing an environment that encourages learning at every life stage produces inquiring minds and intellectually engaged citizens. Lifelong learning also opens doors to greater opportunities and contributes to a higher quality of life.

**STRATEGY**

Piper Trust supports programs that establish an environment of learning at an early age, provide adolescents with real-life learning opportunities, and encourage ongoing learning throughout life. Grantmaking in the Education program area reinforces objectives and strategies in the Children and Older Adults categories.

*Better early learning environments.* Piper Trust works to ensure that children enter kindergarten ready to learn by supporting programs that improve children’s access to quality early learning environments and enhance preschool education. Trust funding focuses on training early education providers and on how curriculum can be improved and potentially standardized.

*Academic enhancements for youth.* Piper Trust funds programs to help struggling students and promote academic success through programs in out-of-school settings. Scholastic improvements for school-age children include tutoring and academic enhancement programs to help students perform better academically and gain social supports to be more successful. The Trust supports residential and community academic programs to help at-risk youth, as well as programs to ease access and transition to college.

*Strengthen lifelong learning opportunities.* The Trust supports learning opportunities that empower older adults to become more involved in their communities and participate in learning activities to remain mentally engaged.

**GRANT DEVELOPMENT CONSULTATION**

Piper Trust staff offer extensive assistance to nonprofits in grant development, research and evaluation, fiscal advice and communication. Program directors prefer to work with organizations before they submit a letter of inquiry. Pre-proposal discussions can help identify projects that are feasible for the organization and align with the Trust’s program areas and priorities. They also can save time and nonprofit resources. These important advance communications can take place via email, telephone or in face-to-face meetings. Program directors always recommend calling first before sending a formal application.

**HEALTHCARE**



**BACKGROUND**

Healthy communities are made up of healthy individuals who have access to state-of-the-art clinical care and physicians at the forefront of medical research. Piper Trust supports programs that strengthen healthcare and introduce best practices, especially for at-risk populations and at critical life stages—early childhood, adolescence and older adulthood.

**STRATEGY**

*Improved healthcare quality.* Piper Trust enhances the quality of healthcare for all Valley residents through improved healthcare facilities, enhanced training of healthcare practitioners and better healthcare delivery systems for children and older adults with the greatest needs.

*Improved healthcare access.* Piper Trust targets expanded access to healthcare by investing in projects that strengthen basic healthcare and mental health services for young children, adolescents and older adults. The Trust works to expand services to meet the healthcare needs of at-risk communities and the capacity of healthcare facilities to serve more children, adolescents and older adults.

*Special Personalized Medicine Initiative.* Piper Trust made a major commitment to personalized diagnostics as part of a longer term goal of making Arizona a center for biosciences.

The Partnership for Personalized Medicine, a collaborative project led by Nobel Laureate Lee Hartwell, Ph.D., president and director of Fred Hutchinson Cancer Research Center, Seattle,

together with the Biodesign Institute at Arizona State University and Translational Genomics Research Institute (TGen), seeks to develop personalized diagnostics that place a greater emphasis on prevention and early detection. The Partnership has adopted a systems approach to bring together researchers, healthcare systems, insurers, economists and regulators to advance discoveries.

**MEDICAL RESEARCH**

**EVALUATION**

Learning is fundamental to everything Piper Trust does. Evaluating the work and effectiveness of the Trust itself is an important part of the process. Program directors and evaluation staff also work closely with potential grantees to identify how the organization will measure success. For some grants, staff may design a more formal evaluation to measure program results. The Trust appreciates that some grants, despite being well-conceived and well-executed, will not achieve the desired results. Information on approaches with less-than-hoped-for impact also is relevant to the future work of the Trust.

**OLDER ADULTS**



**RELIGIOUS ORGANIZATIONS**



**BACKGROUND**

Piper Trust promotes a positive, active view of later life. From the beginning, Piper Trust has drawn upon successful national models to launch a number of initiatives. Taken together, these initiatives represent a “New Maricopa Model for Living the Last Third of Life.” Piper Trust has worked closely with national partners Civic Ventures, Mather LifeWays and National Council on Aging.

**STRATEGY**

The Trust adopted three recognized strategies for successful aging: avoid disease and disability, maintain high cognitive and physical function, and stay involved with life and living.

*Disease and disability prevention.* Grants in this area promote good nutrition, physical exercise and healthy habits to help older adults remain in optimal physical and mental condition over time. Grantmaking initiatives focus on fall prevention through accessible and safe environments, enhanced mobility, wellness programming and medication management.

*Peak physical and emotional health.* The Trust funds programs to keep older adults in their homes, to support caregivers coping with caring for older adults, to improve senior centers and attract the next generation of older adults to those programs, and to train health professionals in understanding better patient and family wishes at the end of life.

*Rewarding and productive activities.* Grantmaking that encourages civic engagement explores meaningful paid and volunteer opportunities for older adults to benefit the community. Major collaborative initiatives include Next Chapter projects, Experience Corps, Maricopa Models of Significant Service and Experience Matters.

**NATIONAL PROGRAM MODELS**

Borrowing good ideas from across the country has been an effective tool for Piper’s strategic grantmaking. Examples include two national program models from the National Council on Aging: BenefitsCheckUp.com, an online program to identify benefits for older adults that the state of Arizona adopted after initial funding by partnering foundations; and Matter of Balance fall prevention program. Staff work hard to stay connected with best practices and innovative new programs and build relationships with local and national funders and nonprofits.

Reflecting Virginia Piper’s deep commitment to her Catholic faith, Piper Trust invests in programs offered by faith-based organizations that focus on young children, adolescents and older adults. The Trust has committed more than \$32.5 million to Catholic high school, elementary and preschool education. Piper Trust invites and supports projects from all faiths that focus on the Trust’s target groups. This grantmaking is reflected in the objectives and strategies in the Children, Education and Older Adults program areas.

**PIPER FELLOWS PROGRAM**

The Piper Fellows program acknowledges the never-ceasing demands of nonprofit leadership and provides opportunities for Maricopa leaders to retool, refresh and renew their skills. Piper Fellowships give nonprofit professionals one month to two months of work-release time plus expenses for study and travel. The program offers a maximum of five awards up to \$30,000 each to support the professional development of outstanding senior executives of 501(c)(3) nonprofit organizations serving Maricopa County. Recognizing the need for learning and exploration among the rest of the staff and board, the Trust provides \$10,000 to each Fellow organization for staff and board professional development. Piper Fellows also are eligible to apply for up to \$50,000 for a Piper Organizational Enhancement Award during the sabbatical or within six months of completing it.

**LEADERSHIP**

**NONPROFIT ASSISTANCE**

Piper Trust makes grants to nonprofits to build organizational strengths and sustainability. In addition, the Trust hosts programs for groups of nonprofits on topics such as fundraising and endowment building and makes grants to 501(c)(3) organizations that serve nonprofit training and support needs.

**PIPER ACADEMIES**

Piper Trust brings experts in a variety of fields to present thought-provoking presentations. Ranging from two-hour to full-day programs, Piper Academies offer professional development opportunities for nonprofit staff and board members as well as forums to share best practices and convene professionals doing similar work. One of the most popular Piper Academies was “Storytelling as Best Practice,” featuring Andy Goodman. Leadership teams from more than 60 nonprofits heard from the national storytelling expert about how stories strengthen organizations, engage audiences and advance missions. The Trust presents Piper Academies each year.

GRANT GUIDELINES

Piper Trust considers letters of inquiry from nonprofit organizations whose requests fall within the Trust’s program goals and strategies. In keeping with its charter, the Trust does not award grants to individuals.

*Eligibility.* To be considered for a grant, an organization must meet three criteria: serve residents of Maricopa County (Arizona); have operated as a Section 501(c)(3) organization or governmental entity for at least three years; and not be a private foundation.

*Grant Application.* To be considered for review, initial inquiries must include a completed Grant Summary Form and a two-page letter of inquiry. The form, as well as additional information on application and the review process, can be found and submitted online at [www.pipertrust.org](http://www.pipertrust.org). Letters of inquiry can be submitted at any time.

BEST PRACTICES FOR NONPROFITS

The trustees of Virginia G. Piper Charitable Trust believe that public trust and accountability are fundamental to their legal and fiduciary responsibilities. To be considered for funding, Piper Trust requires potential grantees to enact several of the best practices recommended by the Panel on the Nonprofit Sector:

*Form 990.* The board, or audit committee, must review the nonprofit’s Form 990 tax return each year before submission.

*Audit.* A nonprofit with \$1 million or more in annual revenue must have an independent annual audit and should establish an audit committee with financially literate membership.

*CPA review.* A nonprofit with annual revenues between \$250,000 and \$1 million must have financial statements reviewed by an independent CPA.

*Conflict of interest.* The nonprofit must adopt a strict conflict of interest statement that the staff and board annually review and sign.

*CEO compensation.* The full board of the nonprofit must approve any change in the compensation of the CEO.

*Travel reimbursement.* The nonprofit must have travel policies with clear guidelines on types of expenses that can be reimbursed and documentation required for reimbursement.

*Board size.* The nonprofit must have a minimum of three members on its governing board, and at least one-third of the members should be independent.

*Whistleblower policy.* The nonprofit must establish policies and procedures that encourage individuals to come forward with credible information about illegal actions or violations of adopted policies.

CODE OF ETHICS

*Grantmaking integrity.* As a grantmaking foundation, Piper Trust’s inherent responsibility is to ensure that grant requests are handled carefully and objectively and that decisions are made solely on the strength of each project. Policies underscore the importance of internal independent evaluation, and it is the responsibility of the Board of Trustees and staff to ensure that all actions reinforce the integrity of the grantmaking process.

The Board of Trustees does not meet with the applicants personally to discuss proposed projects. A Conflict of Interest Policy, updated annually and on record in the Trust offices, defines the relationships for both trustees and staff that could potentially raise questions about grantmaking objectivity. In case of a potential conflict, a trustee does not participate in the discussion or final vote on a pending grant.

*Stewardship.* Each trustee and staff member has the privilege and responsibility to serve as a steward of the Trust by assuring adherence to its mission, vision and values. As stewards, they assume a duty to be familiar with the laws, rules and regulations pertaining to their positions. Each is responsible for carrying out assigned duties in accordance with all policies, rules and regulations. Potential grantees, members of nonprofit organizations and others interacting with the Trust are treated with respect and dignity at all times.

*Confidentiality.* Information about potential grantees, vendors or investments is privileged and will not be shared outside the Trust. However, the judicious sharing of information about grant proposals or nonprofit organizations with other funders, or in collaborative efforts, may be necessary when staff is engaged in the due-diligence process. These restrictions, though, do not prohibit the sharing of financial information with auditors, attorneys, consultants, investment managers or professional colleagues, nor do they prohibit participating in surveys designed to benefit the philanthropic community.

FOR MORE INFORMATION

Contact Piper Trust program directors at 480.948.5853, or [info@pipertrust.org](mailto:info@pipertrust.org). For additional information about Piper Trust, go to [www.pipertrust.org](http://www.pipertrust.org).

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