



The Oregon Community Foundation **Strategic Plan 2010-2015**

Letter from the President and Chair



The Oregon Community Foundation’s founders knew that time doesn’t stand still and that OCF would need to change with the times to meet new needs. In OCF’s 37-year history there has never been a more important moment for the Foundation to step into a new leadership role.

The Great Recession has brought Oregon’s structural weaknesses into high relief. High unemployment persists; services to Oregon’s most vulnerable families have been slashed; K-12 and higher education investment—the pillar of Oregon’s future—is threatened. No single sector in Oregon — whether government, nonprofits, the business community, schools, colleges and universities, or our philanthropies — has the capacity to lead Oregon from a deep economic decline into an era of stable prosperity across the state. And while they are hurting, Oregonians are divided about the path we should take.

While OCF cannot change things alone, the Foundation’s strong roots in Oregon communities and its many productive relationships convince us that OCF is uniquely positioned to help. Our new strategic plan, adopted in May, outlines the steps we plan to take.

In order to promote the positive change that Oregon needs, OCF will expand its priorities to include a new focus on jobs and the economy — complementing the Foundation’s longstanding commitments to education and the needs of children and families. As we did through the ongoing Chalkboard Project on K-12 education, OCF will actively seek out public and private sector partners to create a road map based on the values held by Oregonians. Our tools will include research, surveys, grantmaking, convening, collaboration and advocacy. We will make investments on a smaller scale to help local communities with specific projects, and we will deploy our board, staff and volunteers to foster changes in broad policies needed to ensure a better quality of life in Oregon.

To support real change in Oregon, we recognize that OCF will also need to evolve as an organization. In the next five years, OCF will create an even stronger presence in each region of Oregon, with more accessible services for donors and responsiveness to the nonprofit community. We’ll assess opportunities to use OCF’s endowment in alignment with our program priorities without sacrificing our high standards of stewardship. We’ll expand our partnerships across the board, and we’ll search for “multiplier” opportunities where our three priority areas — jobs, families and education — connect in a mutually reinforcing circle.

We invite Oregonians to unite in securing the state’s future. Though we have a strong sense of urgency, we do not expect quick and easy fixes, because they will not hold. Instead, we encourage a fresh start based on persistent optimism, an understanding that real solutions take time, and your genuine commitment with OCF to a healthy, thriving, sustainable Oregon.

A handwritten signature in black ink, appearing to read 'Mary Wilcox', written in a cursive style.

Mary Wilcox
Chair

A handwritten signature in black ink, appearing to read 'Greg Chaillé', written in a cursive style.

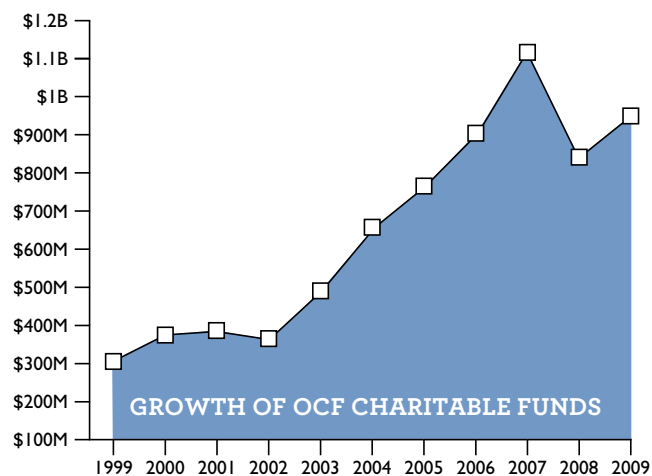
Greg Chaillé
President

THE MISSION OF THE OREGON COMMUNITY FOUNDATION IS TO IMPROVE LIFE IN OREGON AND PROMOTE EFFECTIVE PHILANTHROPY.

Opportunity & Challenge

For 37 years The Oregon Community Foundation (OCF) has pursued a mission to improve life in Oregon and promote effective philanthropy.

OCF has grown rapidly since adoption of its last strategic plan in 2005. Currently the Foundation administers over 1,500 charitable funds with total assets of over \$900 million. The funds come from all regions of the state and reflect highly diverse charitable interests and goals. A network of over 1,600 volunteers supports and assists the Foundation by serving on advisory committees, evaluating grant requests, and linking OCF to the needs of Oregon communities. OCF ranks among the nation's best and largest community foundations.



The remarkable growth of OCF creates significant opportunities and responsibilities, especially now in the context of Oregon's "Great Recession." The recession has resulted in the loss of thousands of jobs, significant increases in community needs paired with gaps in service, increased stress on the state's nonprofit support system, and daunting state budget deficits projected over the next decade. At the same time, Oregon's communities are becoming more complex, with an increasingly diverse population – ethnically, culturally and socioeconomically.

In the midst of these challenges, OCF as a philanthropic leader has a growing responsibility to lead.

On May 5, 2010 the OCF board affirmed broad strategic goals built on OCF's mission and a newly articulated vision for a healthy, thriving, sustainable Oregon.

The strategic plan focuses on the vision and practical steps to help bring this about. It reflects careful new thinking about OCF stakeholders and constituencies. It outlines new protocols and processes to identify, track and measure the impact of programs. And the plan focuses on cultivating OCF's culture and brand so that OCF board, staff and leadership act with confidence, speaking with one clear voice on behalf of the common good of the people of Oregon.

THE VISION OF THE OREGON COMMUNITY FOUNDATION IS A HEALTHY, THRIVING, SUSTAINABLE OREGON.

Elements of OCF's Strategy

OCF believes that a healthy, thriving, sustainable Oregon is based on a “virtuous circle” of education, children and families, and economy – each interlocked with the other. OCF's strategy focuses on helping Oregon address the root causes of problems in each of these areas.



In the areas of Education and Children & Families, OCF has a long track record of effective leadership on which to build new and expanded programs. Important work is already underway and will be sustained.

In Jobs and Economy, OCF will identify areas of potential impact through further research in the coming months. Specific programs and initiatives will be announced as they are developed.

OCF's plan to achieve its goals will be proactive, integrated, and highly engaged with communities. OCF will provide its core services in every region, improving its capacity to:

- Serve donors
- Build flexible endowment and revenue
- Recruit and train volunteers
- Upgrade and use technology effectively
- Train staff in program and organizational skills

These efforts will both strengthen OCF's presence at the local community level and prepare for management succession over the next decade.

OCF plans to use the many tools available to a community foundation to help Oregonians change the state for the better. OCF envisions its own transformation in the process. Building on a bedrock of quality services to donors and support for nonprofits, OCF will foster leadership and problem solving in which its board, volunteers, donors and staff are active participants, encouraging Oregonians to find common ground and new solutions from local neighborhoods to the state capitol.



4H member at the Union County Fair



I Have A Dream, Portland

Highlights of OCF's Strategy

The strategic intent of OCF over the next five years is to simultaneously address the root causes of Oregon's most critical issues, to continue to build philanthropy as an agent of change, and to respond to our highest priority community needs. Over the next five years, we will focus our efforts on five primary strategies.

1. Address the Root Causes of Oregon's Most Pressing Issues

Progress toward the virtuous circle of high quality education, supportive programs for children and families, and energetic development of Oregon jobs and economic strength is essential to every part of our state. OCF will use its unique position as a statewide community foundation to involve Oregonians from the coast to the high desert, from the valleys to the mountains, in finding solutions that bind us together.

In addition to its careful direction of grants and program resources, OCF's strategy will include:

- Advocacy of key policy changes in areas of OCF's highest priorities
- Involvement of local, regional and state leaders across public and private sectors
- Building expertise and competencies within OCF for research, convening, advocacy and coalition-building

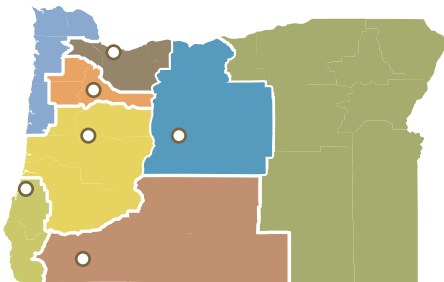
At the same time, OCF will sustain its longstanding traditions of services to donors and support for a broad range of nonprofit work across the state.

2. Devote Increased Resources to Local Communities in Tandem with Statewide Programs

OCF's offices in Bend, Coos Bay, Eugene, Medford, Portland and Salem are powerful evidence of OCF's role as a statewide resource for donors, nonprofits, and communities. OCF's strategic plan will build on this pattern of service to ensure even broader access to the Foundation's staff and leadership, and more exciting opportunities for volunteers to have a positive impact on Oregon.

In our next five years, OCF will focus on developing:

- Full service offices that help the Foundation grow and meet the program needs of each region of Oregon
- Grantmaking that is both regionally responsive and aligned with statewide needs
- Statewide and regional connectivity through technology, staff and volunteer development, and organizational culture
- Statewide communications that reinforce the impact of OCF programs and donors and the change that can be achieved through philanthropy and volunteerism





Committed Partners for Youth, Eugene



Donors Jeff and Carma Mornarich, Roseburg

3. Design and Deliver Effective Grant Programs and Initiatives Supporting Nonprofits and Responding to Community Priorities

OCF's programs are “where the rubber meets the road,” from its ongoing, statewide Community Grants program, to special programs and interests of donor advised funds, to cutting edge initiatives such as the Early Childhood program in collaboration with other funders and community partners. OCF plans to increase its support of communities in solving problems and to improve the evaluation of program results. In addition to making grants, OCF will educate the public on key issues, research and support the best and most promising practices in the field, and convene organizational partners to solve problems together. OCF's board and community volunteers will be at the forefront of these efforts.

Community foundations work behind the scenes to help donors and nonprofit organizations alike achieve their goals. OCF will continue to ensure that diverse types of gifts—stocks, real estate, art, trusts, and many other vehicles—are administered efficiently to create the resources for community benefit that the donor has intended. OCF's five-year strategy depends on continued excellence in this area.

Over the next five years, OCF will focus on the following steps to deliver programs with impact and to support our volunteers and nonprofit community:

- Implement consistent program planning with clear goals, plans, benchmarks, lifespan, evaluation methodologies, and policy opportunities
- Manage programs to exceed national community foundation standards
- Upgrade technology to enhance staff, nonprofit, volunteer and donor access to OCF and to provide enhanced services
- Communicate internally and externally to ensure strong integration of OCF programs and public awareness of results

4. Provide Our Donors with the Services and Support They Value

Generous donors are the lifeblood of OCF, nourishing OCF's capacity to serve Oregon. Since its inception in 1973, OCF has worked creatively to help donors meet their philanthropic goals, and donors have responded by setting up over 1,500 funds in nearly every corner of the state. With these diverse funds directed to general purposes, scholarships for Oregon students, or particular needs of local communities, donor families and individuals have collectively built OCF into one of the nation's largest community foundations.

Advised funds have been the fastest growing area of the Foundation over the past decade, both in numbers and the range of advisor interests. OCF's advised fund staff specializes in knowing every donor's interests and priorities, ensuring a personalized approach to each fund. OCF advised fund donors stand out among community foundation donors nationally for partnering with board-adopted priority programs such as Ready to Learn (with a current focus on Parent Education) and Community 101 (involving middle and high school students in philanthropy and community service). Fund advisors have also worked with OCF to create important programs such as the Gray Family Fund's statewide program in environmental education and the NIKE Employee Grant Fund.



Growing Gardens, Portland

In the next five years, OCF will expand its strong tradition of outreach and partnership with donors through:

- Positioning OCF as the knowledge center for professional advisors, individuals and nonprofit organizations on charitable gift planning
- Building the premier charitable gift planning staff in the Northwest
- Launching new giving programs to promote discretionary giving and grow the number of future permanent funds
- Engaging donors more directly in a range of giving strategies—from operating support to capacity-building to program-related investments
- Introducing generationally appropriate products and services
- Using regional offices, technology and a collaborative approach to improve communications, outreach, gift planning and responsiveness

5. Embody Efficient Stewardship in Everything We Do

OCF is distinguished for its excellent investment performance and low overhead. While the “Great Recession” has impacted OCF’s growth rate as it has all endowments nationally, OCF’s leadership has displayed a steady hand. OCF is here for the long term. In the next five years, OCF will continue its excellent stewardship of funds with the help of a highly qualified, mission-driven staff and volunteer expertise in investment strategies. OCF will also create the infrastructure needed to sustain a modern statewide organization with local programs.

OCF will serve Oregon in more ways and more efficiently by:

- Upgrading technology to provide staff and stakeholders such as donors and volunteers access to OCF grant programs, research and other information as appropriate.
- Providing professional development to ensure that the staff has the skills and capacity to achieve OCF’s goals
- Employing investments prudently and strategically to promote OCF’s mission and values



OCF Leadership Gathering, Bend



OCF – with many community foundations across the nation – embraces the leadership responsibility to move beyond building assets to building communities. This plan is our expression of that commitment.

As OCF develops further over the next five years, the plan will stand as a consistent reminder of our goals. We will seek long-term, transformative solutions. We will seek to unite Oregonians around solutions, for it remains true that a house divided against itself can't stand. We will build on the formidable assets we have as a state. We will build on OCF's own special strengths, find opportunities where philanthropy can play a meaningful role, and protect the investments we've made.

OCF insists that there is a common good that unites us across urban and rural communities, minority and majority populations, newcomers and old timers, and political beliefs. We believe that Oregonians can identify the avenues to positive change for our children, our families, our workers, our students, and our communities. Positive change does not come about by accident. It takes focus, hard work, careful thinking, frequent compromise, and strategic investment. To this end, OCF offers its support, its expertise, and its leadership.



Here for Oregon. Here for Good.

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