

# **LEADERSHIP, LEGACY, IMPACT**

THE OREGON COMMUNITY FOUNDATION

**2015-2018 STRATEGIC PLAN**





The mission of  
The Oregon Community Foundation  
is to improve life in Oregon and to  
promote effective philanthropy.

The vision of  
The Oregon Community Foundation  
is a healthy, thriving, sustainable Oregon.



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# **LETTER from OUR BOARD CHAIR and PRESIDENT**

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December, 2014

Oregon is a marvelous place with spectacular natural landscapes and abundant resources. It's a place treasured by its indigenous people and generations of pioneer families, and it annually attracts thousands of newcomers with aspirations to a good life. It's a place where community is valued and people help others in need: Oregonians volunteer their time and donate their resources more generously than many other states in the nation. Oregon's growing diversity brings new energy and talent to our communities that complement and build on the achievements of all who came before.



But Oregon is not without its challenges. It is a place where too many people still struggle to find and sustain a financially stable, high quality of life and too many children struggle to gain the education and skills they need. It is a place of growing disparities in health, safety, education, and income. And for too many years Oregon's economic growth has lagged that of the nation as a whole. Demand on the nonprofit and philanthropic sectors to help close persistent gaps in outcomes for Oregon's people has continued to grow.

We believe that The Oregon Community Foundation is uniquely positioned to meet needs and seize opportunities. As a statewide community foundation, with an endowment generated by the collective resources of thousands of Oregonians, we have strong links to families, leaders, and institutions in every county. We provide unmatched stewardship of our donors' charitable funds as we partner with them to help them achieve their philanthropic goals. These resources enable us to respond effectively to locally identified needs and to create initiatives aiming at more systemic change. Spearheaded by experienced board members, staff and over 1,600 volunteers, our work is strengthened through partnerships across philanthropy, business, government, and the nonprofit sector.

This strategic plan represents our commitment to muster every resource at our disposal to build a healthy, thriving, sustainable Oregon. In it we identify the areas of major focus and greatest investment where we believe that OCF can help to make a tangible difference in the quality of life for the people of Oregon.

A handwritten signature in black ink that reads "Sue Miller".

Sue Miller, OCF Board Chair

A handwritten signature in black ink that reads "Max Williams".

Max Williams, President and CEO

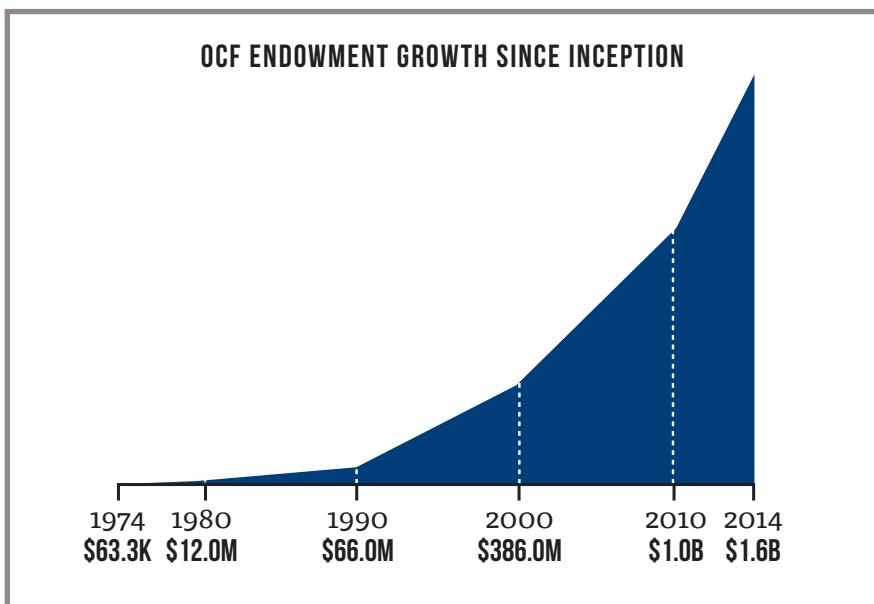
# An INTRODUCTION



Since 1973 The Oregon Community Foundation (OCF) has pursued a mission to improve life in Oregon and promote effective philanthropy. From an initial gift of \$63,000 OCF has grown into one of the nation's ten largest community foundations: a dramatic story that testifies to the deep commitment that OCF donors have to their state and their fellow Oregonians.

In the wake of that first gift, more than 1,800 families, individuals and groups have built the largest foundation in Oregon by creating funds with total assets of over \$1.6 billion. Donors have hailed from every corner of the state, reflecting diverse charitable interests and goals. But key values are held in common: dedication to Oregon and a better quality of life for its people.

Every year OCF funds support thousands of Oregon nonprofit organizations and thousands of Oregon college and university students. They contribute to the health and positive development of young children. They support the needs of newcomers to Oregon and the needs of families that have resided here for generations. They promote arts and culture, a healthy environment, volunteer involvement in communities, workforce development and economic vitality, and much more. In its 40 years OCF has distributed grants and scholarships exceeding \$900 million.



OCF's work rests on some important basic principles.

- We are committed to responsible stewardship of the funds entrusted to us by our donors.
- We believe that creative and sustainable solutions come from people who work in partnership to address common needs and aspirations.
- We give high priority to investments that create positive, substantive change and attempt to resolve problems at their source.
- We recognize and respect Oregon's diverse regions and populations, and we seek to advance equity, diversity, and inclusion through our programs.
- We use research and evaluation to inform our programs and initiatives.

As the foundation has grown, its roles have multiplied. While affirming the core community foundation tradition of responsiveness to community-identified needs, OCF accepts the responsibilities of leadership and partnership inherent in being the state's largest philanthropy.

More than ever, OCF's responsive grant-making is accessible to groups in every corner of the state, responding to a broad range of needs and opportunities identified by communities themselves. Responsive grants support grassroots problem-solving, while also building OCF's hands-on knowledge of the challenges, needs, assets and opportunities of Oregon's rural and urban populations.

As a leader and partner, OCF has been careful to concentrate on areas in which its resources, expertise and networks combine to offer the best chance of making a genuine difference. In these key focus areas – education (including early childhood programs), economic vitality, arts and culture, and children's dental health – OCF is dedicating not only grant dollars as "change capital," but the resources of its board, staff and volunteers to convene allies, research issues, develop policy, and lead strategic partnerships for meaningful change in Oregon.



# OCF'S STRATEGIC PLAN

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*Oregon's population continues – rapidly – to grow ever more diverse, but some communities' voices remain under-represented in public discourse and decision-making.*

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In 2010, in the wake of the "Great Recession," OCF adopted a five-year strategic plan. That plan has led OCF in the past four years to emphasize new directions in its leadership, better focus its efforts on the underlying causes of personal and community distress (including economic challenges) and draw on the talents of Oregonians committed to working toward positive outcomes for local communities and for the state as a whole.

Since 2010, much has changed in Oregon – and much has not.

- The economy is recovering – but not as quickly as elsewhere, and especially not in rural areas.
- Education reform is underway with some major successes and emerging initiatives – but gaps in outcomes for many students, especially in communities of color, stubbornly persist.
- Promising collaborations have emerged to resolve old conflicts between advocates of economic growth and advocates of a healthy environment – yet much more remains to be done to develop consensus on water, fishery, forestry and range issues.
- Oregon's population continues – rapidly – to grow ever more diverse, but some communities' voices remain under-represented in public discourse and decision-making.





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*In 2012 OCF received one of the largest gifts ever made to a community foundation, creating the Fred W. Fields Fund and bringing new resources and focus on the arts and education.*

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Much has changed for OCF since 2010 as well.

- In 2012 OCF received one of the largest gifts ever made to a community foundation, creating the Fred W. Fields Fund and bringing new resources and focus on the arts and education.
- The board and staff have developed plans for assessing and strengthening equity, diversity and inclusion as core OCF values.
- Productive partnerships with other funders, business, and state government have blossomed and are a key strategy for Oregon's success.

Now, as 2014 draws to a close, OCF is adopting a refreshed strategic plan that recognizes and honors OCF's continued role as a responsive grantmaker along with our steadily evolving role as a statewide leader on key issues. We outline our areas of major focus in the following pages.

# ELEMENTS of OUR STRATEGY

## IMPROVE LIFE IN OREGON

OCF has the knowledge, experience and resources to effect long term change while we also respond to today's community needs. We will build on our strengths and continue to experiment and learn as we:

### **Respond to evolving, community-identified needs through broadly accessible statewide grant and scholarship programs.**

- Attend carefully to community needs and trends and enhance local engagement in decision-making through the Community Grants and the Small Arts and Culture Grants Programs.
- Make higher education more affordable by ensuring OCF's Scholarship Program is broadly known, accessible, and focused on student success.

### **Lead sustainable, positive change for Oregon by addressing critical issues through strategic investments and partnership with others.**

- Implement long-term strategic programs to improve outcomes in Education and Early Childhood, Community Engagement, Children's Dental Health and Arts and Culture.
- Use a wide variety of methods available through philanthropy including grantmaking, research, convening, policy advocacy, and mission-based investment.
- Develop ways in which OCF can support collaborative efforts that improve environmental health and the economy.
- Use philanthropy to contribute to Oregon's economic vitality through research, investments, and grantmaking.
- Adopt and implement a clear commitment to equity, diversity, and inclusion.
- Develop deeper partnerships with other foundations, nonprofit organizations, businesses, institutions, and donors to carry out strategic solutions to statewide problems.



## EDUCATION

Oregon's children lag behind on key educational benchmarks including high school graduation, and there is a persistent achievement gap among children based on race and income. Improving educational outcomes for Oregon's children requires investments along the entire educational continuum, starting with early childhood.

### **Key Initiatives:**

**Parenting Education**, supporting parents in their role as their child's first and most important teacher

### **P-3 (Prenatal through 3rd Grade)**

**Alignment**, improving coordination between early childhood programs, elementary schools, and families to ensure children succeed in school

**K12 Student Success**, expanding and enhancing after school programs to improve academic achievement

**Scholarships**, improving access to higher education

## **Carefully plan programs, measure results and effectively communicate outcomes and lessons learned.**

- Design programs based on research, implement them with fidelity and evaluate results.
- Communicate program results and lessons learned to benefit the nonprofit and philanthropic sector.
- Integrate OCF's programs and initiatives so each supports the others in order to achieve maximum impact.

## **Promote public policies that further OCF's priorities.**

- Expand OCF's proficiency and capacity to affect public policy.
- Monitor policy developments relevant to OCF's priority areas and the philanthropic sector.
- Contribute to statewide policy discussions and educate OCF constituents about important policies.

## **Advance equity, diversity and inclusion through our programs and initiatives by recognizing and supporting Oregon's diverse regions and populations.**

- Ensure grant and scholarship dollars are distributed across Oregon.
- Track diversity of populations being served and adjust program outreach and methodology where disadvantaged populations are underrepresented.
- Engage diverse populations in addressing important community needs.
- Expand the reach of the Latino Partnership Program and partner with other diverse communities.



## **HEALTH & WELL-BEING**

Ensuring the physical, mental, and oral health of Oregonians is critical to building thriving communities. Large numbers of Oregon's children suffer from rampant untreated dental decay, a disease that is largely preventable.

**Key Initiative:**  
**Children's Dental Health Initiative,** providing statewide leadership and advocacy to improve children's oral health



## ARTS AND CULTURE

Vibrant arts and culture programs are integral to a society's health. Philanthropic investments in arts education and creation and support of arts organizations statewide can foster arts appreciation and participation.

### **Key Initiatives:**

**Studio to School**, exploring ways communities and schools can work together to increase high quality arts education

**Creative Heights**, creating new work in arts and culture for Oregon audiences

**Small Arts and Culture Grants**, making sure Oregonians across the state can experience arts and culture

## PROMOTE EFFECTIVE PHILANTHROPY

Philanthropy has a unique and important role to play in creation of a healthy, thriving, sustainable Oregon. By assisting donors to meet their philanthropic goals, OCF is working to improve life in Oregon. We embrace the opportunity to:

### **Share our expertise in charitable giving and estate planning with individuals, families, professional advisors, and nonprofit organizations.**

- Increase the variety of services offered to current and deferred OCF donors.
- Expand OCF's charitable services to families to help them develop their philanthropic goals.

### **Build a climate of donor engagement, education and stewardship.**

- Invite and involve Oregonians to increase charitable giving to strengthen the state.
- Deliver the highest quality donor services.
- Provide opportunities for co-investment that align donor and foundation priorities.

### **Diversify participation from new donors reflecting the complexity of our state.**

- Build donor relationships in diverse communities through effective outreach and leadership opportunities.
- Engage next generation donors.

### **Effectively communicate the impact of OCF's grantmaking, partnerships and leadership.**

- Disseminate research on key issues.
- Broadcast the outcomes of OCF programs.
- Convey OCF's role in partnering with donors to expand a permanent endowment for the state.

# ENGAGE AND SERVE ALL OF OREGON

Community is at the heart of everything OCF does, whether those communities are defined by geography, by culture, or by circumstance. In order to engage people in our work and also to support their engagement at every level of civic and community life we will:

## **Strengthen and adapt our service to donors, nonprofits, volunteers, and leaders locally in Oregon's communities.**

- Provide a full range of service in every region of the state tailored to regional conditions and opportunities.
- Use a cost-effective, well organized outreach program to inform non-profit organizations, potential donors and community leaders about OCF and the benefits of philanthropy.



## **COMMUNITY ENGAGEMENT**

Community engagement is a central component of a thriving state, and Oregon is made stronger through its diverse communities working together.

### **Key Initiatives:**

**Latino Partnership Program**, increasing participation by Latinos in community life and in local and statewide leadership and policy

**Community 101**, engaging young Oregonians in service, leadership, and philanthropy

**Leadership Councils**, participating with OCF as advisors to inform the foundation about community needs at the local level

## **Strengthen OCF's regional presence and build a statewide sense of community by involving a statewide network of community leaders in our work.**

- Improve OCF's volunteer management to more effectively engage volunteers in our operations and outreach.
- Strengthen Leadership Councils and engage Council members as advocates, ambassadors and advisors for OCF.
- Use OCF's convening ability to bring together leaders from around the state.

## **Foster community engagement and connections, encourage the exchange of knowledge, and offer meaningful opportunities for a wide variety of Oregonians to participate in community life.**

- Support and improve Oregon's capacity for volunteering and leadership development.
- Create opportunities for Oregonians to work together and create bridges across regions and across cultures.

## **Communicate OCF's conviction that Oregon is stronger when its diverse communities work together.**

- Portray the diversity of Oregon's people, geography and communities in OCF communications.
- Highlight Oregon's changing demographics and the benefits of diversity.
- Network with communities of color and other underserved groups to better serve all Oregon communities.



## STRENGTHEN OCF'S CAPACITY TO MEET ITS MISSION

In the best tradition of community foundations, OCF has a fundamental commitment to high quality, cost-effective administration and investment management in order to give back generously and wisely to Oregon. OCF will:

### **Sustain a high quality investment program.**

- Rigorously pursue diversified investment strategies maintaining OCF funds' purchasing power and payout rates.
- Allocate well targeted impact investments, evaluating their outcomes and priority within OCF's overall mission.

## ECONOMIC VITALITY

Philanthropy can play a narrow but important role in contributing to the economic vitality of Oregon.

### **Strategies:**

**Improving** access to capital for smaller Oregon businesses, with special attention to rural communities

**Investing** in effective entrepreneurship training programs and early-stage funds

**Providing** low interest loans for nonprofit organizations

**Promoting** the sustainable use of natural resources

### **Recruit, train, and retain talented, diverse board members, staff and volunteers.**

- Engage in new forms of outreach and participate in recruitment networks, especially those helping OCF achieve its goals in equity, diversity and inclusion.
- Create a new structure for professional development of staff that includes cultural competency.
- Research and implement policies and practices to foster a supportive, flexible, productive workplace culture attractive to talented employees in many phases of their careers.

### **Invest in technology needed to support the full scope of OCF's programs, services, and communications, improving statewide access.**

- Develop and improve systems for the full range of OCF stakeholders to better access OCF resources and information.
- Equip and train staff to use technology, including social media tools, more effectively.



**Adhere to high standards of administration including timeliness, transparency, accuracy, and efficiency.**

- Improve access to and usability of OCF data for the public good.
- Implement standards of excellence in "client service" across the foundation.
- Identify and use best practices for effective internal and external communication.

**Support a culture of learning and collaboration.**

- Increase formal and informal learning opportunities for staff and volunteers.
- Integrate OCF's evaluation, learning and data collection into the development of new programs and priorities.



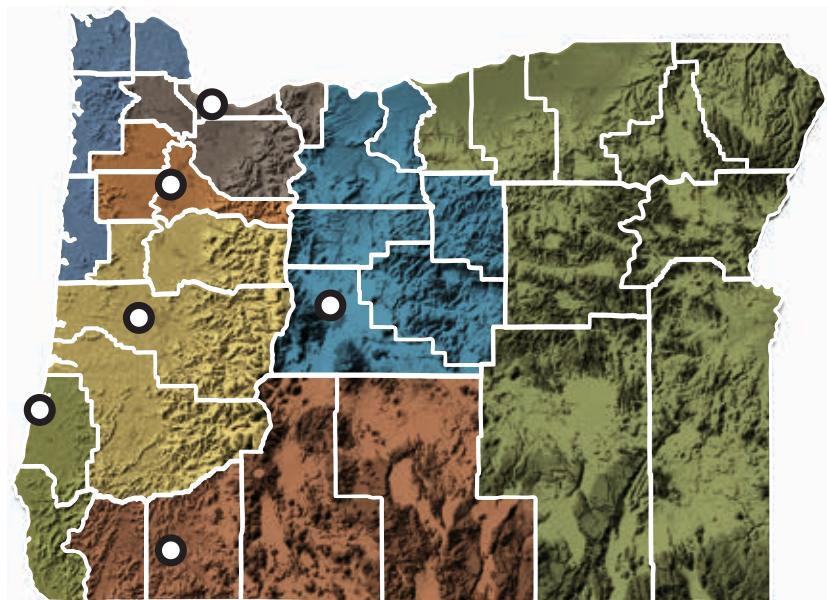
## CONCLUSION

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The process of planning is a sharp reminder that the work of The Oregon Community Foundation will never be complete, just as the history of Oregon will never be finished. The purpose of this plan is to inspire positive change, provide a clear focus for our work in the next three years, define what matters enough to measure and evaluate, and invite Oregonians to partner with us. We welcome the wisdom and participation of all Oregonians to assist us in our work.



THE OREGON  
COMMUNITY  
FOUNDATION



## OCF REGIONAL OFFICES

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### **PORTLAND**

1221 SW Yamhill St.  
Suite 100  
Portland, OR 97205  
**503.227.6846**

### **BEND**

15 SW Colorado Ave.  
Suite 375  
Bend, OR 97702  
**541.382.1170**

### **COOS BAY**

915 S First St.  
Coos Bay, OR 97420  
**541.269.9650**

### **EUGENE**

440 E Broadway  
Suite 160  
Eugene, OR 97401  
**541.431.7099**

### **MEDFORD**

818 W Eighth St.  
Medford, OR 97501  
**541.773.8987**

### **SALEM**

1313 Mill St. SE  
Suite 203  
Salem, OR 97301  
**503.779.1927**



OCF works with individuals, families, businesses, and organizations to create charitable funds to support the community causes they care about.

To create your legacy today, call your local OCF office, visit [www.oregoncf.org](http://www.oregoncf.org), or email [giftplanning@oregoncf.org](mailto:giftplanning@oregoncf.org).

**40** THE OREGON  
YEARS COMMUNITY FOUNDATION