



Orientation Guide

FOR BOARD MEMBERS, STAFF & VOLUNTEERS

2020-2021





Oregon Community Foundation

OUR MISSION

To improve lives for all Oregonians through the power of philanthropy.

OUR VISION

A healthy, thriving, sustainable Oregon.

OUR VALUES

COLLABORATIVE ACTION We believe in collaborative action based on learning, innovation, integrity and respect.	WISE STEWARDSHIP We believe in wise stewardship of OCF assets, faithful adherence to our donors' intentions, and effective investment in our communities.
EQUITY, DIVERSITY AND INCLUSION We believe in advancing equity, diversity and inclusion in our work to fulfill our mission and achieve our vision.	SPIRIT OF COMMUNITY We believe in a culture of service and leadership promoting individual potential, a spirit of community and a better future for all Oregonians.



Welcome!

Today, you are joining approximately 1,600 volunteers and 95 staff members who are helping Oregon Community Foundation to build a healthy, thriving and sustainable Oregon.

Our people come from all over the state, and they care deeply about Oregon and other Oregonians. Their tireless efforts help the Foundation to realize its mission:

To improve lives for all Oregonians through the power of philanthropy

No matter what your role is, your involvement and commitment allow OCF to deepen its positive effect on Oregon and to create a statewide community of people who understand how important philanthropy is to our shared future.

This guide explains the work of the Foundation so that you can be a knowledgeable ambassador for OCF and for philanthropy in Oregon.

Thank you for joining us!

A handwritten signature in black ink, appearing to read "Max Williams".

Max Williams, President and CEO
Oregon Community Foundation

About Community Foundations

A community foundation is a nonprofit organization that administers charitable funds established by gifts and bequests from individuals, families, businesses and organizations. The donor establishes a permanent named fund within the foundation's endowment, and the foundation makes grants and scholarships from these funds to qualified recipients. Depending on the donor's personal interests and concerns, distributions may be made for broad or specific purposes.

Community foundations also bring members of various communities together to address larger issues. As a result of this dedication to collaboration between nonprofits, government, and a diverse community of donors and volunteers, community foundations often become regional leaders for philanthropy and community engagement.

ABOUT OCF

Willamette Industries founder William Swindells believed in giving back to the state that made his fortune. He built lumber mills across Oregon, creating thousands of family-wage jobs. Like his wood products companies, his vision of philanthropy encompassed the state. In 1973, he and a statewide board of directors established Oregon Community Foundation as a permanent endowment for improving Oregon communities.

Today, OCF works with donors to preserve Oregon's cherished history while meeting its evolving needs. For promising students, OCF can be the launchpad for a successful future. For rural families, it can ensure timely access to health care. For aspiring artists, and communities organizing for cultural enrichment, OCF can be a vital connecting force. For donors, it's a reliable partner in supporting the causes that matter most to them.

Having started from William Swindells' initial contribution of \$63,000, OCF now manages more than \$2 billion through roughly 2,000 charitable funds.

WHAT OCF DOES

OCF works with individuals, families, businesses and organizations to create legacy funds that support community causes. A fund can be started with \$25,000 or more and can go on giving for generations. Our shrewd investment management optimizes the purchasing power of these funds, allowing us to distribute more than \$100 million in grants and scholarships each year.

The Foundation also develops strategic initiatives that are transforming life in communities throughout our state. More generally, OCF works to find collaborative, long-term solutions to serious problems at the state and local levels. As a trusted nonpartisan convener, OCF builds bridges between the public, private and nonprofit sectors to address issues that no one sector can solve on its own.

"THE BOTTOM LINE IS THAT OCF IS A VERY REPUTABLE ENTITY. IT HAS A GREAT TRACK RECORD WITH MANAGEMENT OF FUNDS. IT HAS BUILT A SIGNIFICANT ENDOWMENT AND THAT LENDS TREMENDOUS CREDIBILITY AND VIABILITY FOR INVESTING IN PERPETUITY."

JEFF MOORE

PARTNER, SAALFELD GRIGGS PC

WHAT YOU CAN EXPECT FROM OCF

No matter what role you have with OCF, you can expect:

- Personal orientation and training for the roles we ask you to fill.
- Prompt response to your communications.
- Fair and equitable treatment without discrimination or bias.
- Appreciation, respect and recognition for your efforts.

WHAT OCF EXPECTS FROM YOU

OCF expects every person who represents us to follow these guidelines:

- Represent OCF professionally and honorably.
- Maintain confidentiality and discretion about OCF and its donors, grantees and scholarship applicants.
- Declare any conflict of interest as soon as it arises.
- Act for the community benefit at all times.
- Understand the value of philanthropy, and promote a statewide culture of giving.
- Respond promptly to communications from OCF and its partners, and keep OCF updated with your current contact information.



OCF MILESTONES

- 1973** OCF incorporated
- 1975** First grants awarded, totaling \$31,000
- 1978** Assets hit \$10 million, grants hit \$366,000
- 1983** First endowment partner: Albertina Kerr
- 1989** Assets hit \$50 million, grants hit \$4.5 million
- 1991** Oregon Child Care Initiative launched
- 1992** First leadership council
- 1994** First Giving in Oregon report
- 1998** First regional office (Eugene)
- 2001** Latino Partnership Project formed in Salem
- 2008** Assets hit \$1 billion, grants hit \$56 million
- 2010** Oregon Parenting Education Collaborative launched
- 2011** Grants and scholarships exceed \$86 million
- 2012** Scholarship endowment reaches \$100 million
- 2013** Children's Dental Health Initiative launched
- 2014** OCF's 40th anniversary: \$1.6 billion in assets, \$900 million in grants and scholarships, 1,800 funds
- 2014** Equity, Diversity and Inclusion Commitment adopted by Board of Directors
- 2015** Grants and scholarships total \$1 billion
- 2018** Black Student Success Initiative launched
- 2020** For COVID-19 relief, raised \$18.2 million and deployed \$26.9 million in grants to 1,145 nonprofits

OCF QUICK FACTS

- Established in 1973.
- Tax exempt under section 501(c)(3) of the Internal Revenue Code.
- Oregon's largest foundation by asset size, and one of the nation's 10 largest community foundations.
- Permanent assets exceed \$2 billion.
- National reputation for asset growth and grantmaking leadership.
- More than 3,000 funds.
- Manages each fund in accordance with the donor's wishes, forever.
- More than \$1 billion in grants and scholarships since 1974.
- Scholarship awards total more than \$10 million per year.
- Main office in Portland, with regional offices in Bend, Eugene, Medford and Salem.
- Approximately 1,600 volunteers and 104 staff members.

EQUAL OPPORTUNITY & NONDISCRIMINATION

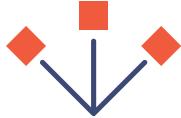
- OCF **does not discriminate** on the basis of race, color, age, gender, gender identity or expression, religion, national origin, political or union affiliation, marital status, pregnancy, disability, sexual orientation or any other protected status recognized by local, Oregon or federal law.
- OCF's commitment to equity, diversity and inclusion includes fostering a **gender-inclusive workplace** and using language that individuals and communities use to describe themselves, including gender inclusive pronouns.
- The Foundation is committed to fostering a **supportive environment** where all staff and volunteers are treated with dignity and respect and have the opportunity to make maximum use of their work-related skills and talents.
- Discrimination by supervisors or coworkers on the basis of any protected status is an unlawful employment practice and **will not be tolerated** by OCF.
- Discrimination against employees or volunteers by any individual or organization doing business with OCF **will not be tolerated** by OCF.
- If you are aware of a violation of any of these policies, **report it immediately** to your supervisor, a human resources officer, the vice president of people and culture, or the president. OCF prohibits retaliation against any employer or volunteer who makes a good-faith complaint of discrimination or who cooperates in the investigation of any such complaint.



"AS A LATINA, I APPRECIATE HOW OCF IS HELPING LATINAS AT ALL LEVELS AND SUPPORTING LATINO GROUPS THROUGHOUT OREGON."

AND QUITE SIMPLY, I LIKE OCF'S MISSION: TO MAKE A BETTER LIFE FOR ALL OREGONIANS."

**PATRICIA MORRISSEY
GRANT EVALUATOR**



INSPIRE GIVING

Increase Impactful Giving in Oregon

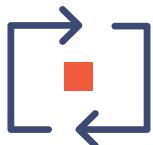
- Steward Current Donors, Celebrating Their Giving and Impact.
- Attract New Donors with Innovative Services and Approaches.
- Expand Awareness and Connection with Charitable Giving.



ADVANCE OPPORTUNITY

Increase Public and Private Investments in Early Childhood and Family Supports

- Promote Universal Access to Parenting Education.
- Reduce Barriers to Access and Support Culturally Relevant Strategies.
- Increase Awareness About the Opportunity Gap and Solutions.



ENGAGE COMMUNITIES

Support Community Problem-Solving

- Increase the Number of Oregon Communities that Have Tools, Resources and Influence to Solve Problems Collaboratively, Inclusively and Equitably.
- Strengthen and Invest in Oregon's Community Leaders.
- Build, Sustain, Grow and Reflect Strong Relationships with Diverse Communities.

Equity, Diversity and Inclusion Commitment

Oregon Community Foundation's mission is to improve the lives of all Oregonians through the power of philanthropy. OCF aspires to pursue its mission across all Oregon communities and populations. These communities are far more diverse and complex than they were throughout much of the state's history and in coming times will reflect the diversity of the world.

In November 2014, the OCF Board of Directors adopted a formal commitment to Equity, Diversity and Inclusion (EDI) with the statement below. We recognize that EDI is a journey and as we travel this road, we will need many others to advise us, to partner with us, to reinforce our work and to inspire us. We ask for the support and the participation of all Oregonians as we work to keep these commitments so central to our mission.

OCF believes that persistent disparities based on such characteristics as race, gender, national origin, ethnicity, culture, disability, age, faith, gender identity and sexual orientation, together with barriers imposed by poverty, prevent OCF's vision of a healthy, thriving, sustainable Oregon from being fully realized.

Individually and institutionally, Oregonians must be committed to move forward as one state. As we do, we will discover that we are stronger economically, richer culturally, healthier physically and mentally, and better prepared educationally to meet the challenges we face. Real change is seldom easy to achieve, and it requires strong, intentional leadership supported by the open participation and wisdom of many.

OCF COMMITS ITSELF:

To **APPRECIATE** the dignity and worth of all individuals.

To **INVITE** honest and dynamic discourse on the issues of equity, diversity and inclusion.

To **DEVELOP** within our own operations and policies a spirit and discipline that advances equity, diversity and inclusion.

To **NURTURE** an open and welcoming working environment.

To **PROMOTE** the dismantling of structural and cultural barriers to individual achievement.

To **USE** our resources toward the goal of making Oregon a place in which all people fully realize their aspirations.

To **ADVANCE** public policies and practices that are consistent with these commitments.

EDI DEFINITIONS AT OCF

EQUITY: promotes justice within the procedures, processes, and distribution of resources by institutions or systems. Tackling equity issues requires an understanding of the underlying or root causes of outcome disparities within our society.

DIVERSITY: refers to a broad representation of a community's demographic mix, focusing on race, ethnicity, sexual orientation, sex, gender identity, abilities and disabilities, religion, age, socioeconomic status, immigrant/ refugee status, rural/geographic isolation and perspectives arising from different backgrounds.

INCLUSION: refers to the degree to which diverse individuals are able to participate fully in the decision-making processes within an organization or group. While a truly "inclusive" group is necessarily diverse, a "diverse" group may or may not be "inclusive."

ADDITIONAL DEFINITIONS

CULTURE: the set of attitudes, values, beliefs and behaviors shared by a group of people

CULTURAL AGILITY: the ability to understand multiple contexts and work within them, using self-awareness, self-management, and social awareness, to build and sustain relationships.

INTERSECTIONALITY: the interconnected nature of social categorizations such as race, class and gender as they apply to a given individual or group, regarded as creating overlapping and interdependent systems of discrimination or disadvantage. This was originally developed by Dr. Kimberlee Crenshaw to describe how that the forces of racism and sexism combine to have a compounding impact on Black women. The theory has since been used by scholars and activists alike to explore intersections of oppression.

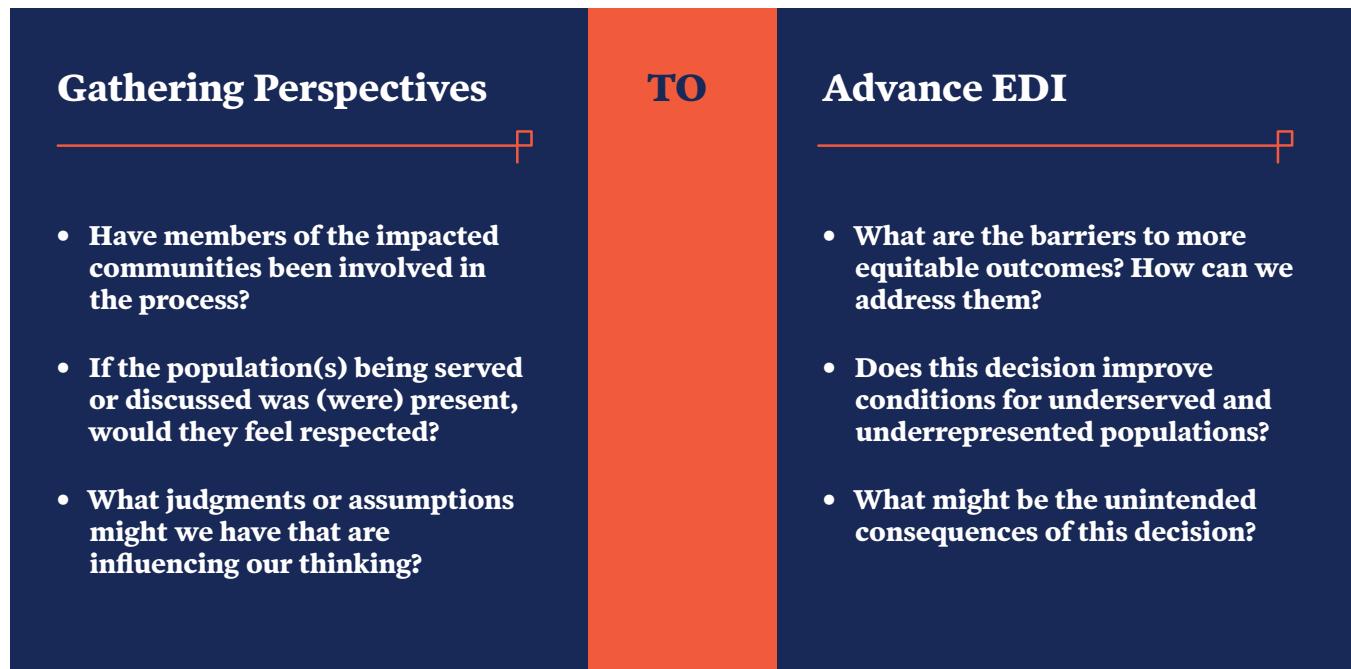
RURAL OR GEOGRAPHIC ISOLATION: communities under 35,000 in population and not adjacent to or part of a metropolitan area. OCF recognizes that rural communities are often underserved and experience many barriers to accessing resources. Within rural communities, historically marginalized

communities are disproportionately impacted by these disparities. OCF strives to reach communities experiencing the greatest disparities.

CULTURALLY SPECIFIC: predominately serves a specific community and for the most part is staffed and led by members of that community. Culturally specific organizations' mission, activities and outreach all focus on a population that has experienced significant bias or discrimination. Their staff, board and volunteers predominantly reflect the population they serve, and the population they serve recognizes the organization as serving their community.

CULTURALLY RESPONSIVE: Recognize the diverse cultural characteristics of individuals as assets. Culturally responsive practices empower people intellectually, socially, emotionally and politically by using cultural referents to impart knowledge, skills and attitudes. Culturally responsive organizations have some programming that is created and tailored and appropriate to certain populations, but the organization as a whole might not be led by a specific community or focus specifically on that community.

APPLYING AN EQUITY LENS



WHY AN EQUITY LENS?

Building a culture of equity requires asking questions through an equity lens and creating meaningful space for dialogue to ensure more equitable outcomes. An equity lens is designed to intentionally practice slowing down and reflecting upon inclusive decision-making that will lead to more equitable outcomes. It also becomes part of our learning process and supports the work we are doing.

An equity lens should be used in making decisions, reviewing processes and policies and developing solutions or programs. When philanthropy doesn't apply an equity lens in our work, we run the risk of funding and perpetuating the same systems that allow inequities to prevail.

The mission of Oregon Community Foundation is to improve lives for all Oregonians through the power of philanthropy. OCF aspires to pursue its mission across all Oregon communities and populations. OCF believes that persistent disparities based on such characteristics as race, gender, national origin, ethnicity, culture, disability, age,

faith, gender identity and sexual orientation, together with barriers imposed by poverty, prevent OCF's vision of a healthy, thriving, sustainable Oregon from being fully realized. In order to be a responsive grant maker, OCF believes that we need to ensure that we have diverse perspectives and equitable outcomes.

Oregon, and our nation as a whole, is experiencing widening disparities along racial, ethnic, socio-economic and other lines, and now more than any time in the past several generations do the circumstances of one's birth determine the opportunities that are available and the life paths that

are achievable. Oregon's low-income communities, communities of color and rural communities do not receive the same opportunities available to other Oregonians, and this opportunity gap has far-reaching implications for personal achievement and well-being as well as for community vitality. OCF cannot meet its mission of improving life for all Oregonians if the foundation does not

address this opportunity gap.

OCF's overarching theory of change is that in order to improve life for all Oregonians, we need to close the opportunity gap in education, arts and culture, economic vitality, health & well-being, livability and community engagement.

OCF EQUITY, DIVERSITY AND INCLUSION KEY MILESTONES

November 2019 marked the five-year anniversary of the Board's formal commitment to EDI, building on momentum from OCF's prior EDI advancements. This timeline highlights key milestones leading up to the adoption of the Board's formal EDI commitment statement and steps taken to advance EDI since that time. It's a journey, the road is long and winding, and we have many accomplishments to celebrate!

2012-2013

Formation of EDI Staff Committee & Board Equity Committee.

2017

Implementation of equity lens.

Infusion of EDI into strategic plan. EDI added as a core organizational value. New brand identity and related marketing aligns with EDI commitment.

2014

Adoption of EDI Commitment Statement by Board of Directors.

2019

Implementation of strategic plan and efforts to align/operationalize EDI into all aspects of the foundation's mission.

2015-2016

Development of EDI framework and equity lens.

2018

Black Student Success initiative launched.

State-wide Oregon Latino Higher Education Summit – LPP

New positions created and filled: 1) Black Student Success Program Officer; and 2) Vice President of People & Culture, including responsibility for org-wide leadership for EDI.

First Black Student Success convening.

Roles of OCF Volunteers

The remarkable generosity of Oregonians has had a huge impact on OCF's ability to serve our state's most vulnerable populations and to improve the quality of life in Oregon.

OCF's dedicated volunteers are central to the continued success of our mission. Volunteers from every part of Oregon provide the Foundation with personal, in-depth understanding of community needs.

Volunteers are usually selected to fill specific roles at OCF to meet the need for expertise in a certain issue or region. Individual regions may also have their own priorities and procedures for placing volunteers.

LEARN MORE: oregoncf.org/about/our-people/volunteers

BOARD OF DIRECTORS

Fifteen knowledgeable community leaders from across our state govern the Foundation.

BOARD SUBCOMMITTEES

Board subcommittees include *Arts; Audit; Community Engagement; Development & Marketing; Education; Equity; Executive; Grants; Investment; Nominating; and Strategic Opportunities*. Subcommittees may include current board members and expert community volunteers.

LEADERSHIP COUNCILS

OCF's eight leadership councils help us understand and respond to distinct local needs. (See the regional map on page 18.) The 160 members of these regional councils provide our board of directors with vital information and guidance on our services and leadership efforts around the state. Each council member serves as an ambassador and advisor for OCF, and as an advocate for philanthropy.

OCF BOARD OF DIRECTORS 2020-2021

Sue Naumes
Medford
Chair

Kimberly Cooper
Portland
Vice Chair

Bill Berg
Portland
Treasurer

Carolyn Walker
Portland
Secretary

Lane Shetterly
Dallas
At Large

Penny Allen
Bandon

Al Barkouli
Portland

Peter Bragdon
Portland

Bobbie Conner
Pendleton

Patrick Criteser
Tillamook

Su Embree
Portland

Romy Mortensen
Bend

Peter Nickerson
Portland

Sabrina Parsons
Eugene

Patrick Reiten
Portland

GRANT EVALUATORS

About 100 trained grant evaluators review requests for grants, conduct fact-finding visits and follow-up reviews, and produce reports. Most grant evaluators serve in the Community Grant or Walker Grant program. For grant programs with a topical or geographic focus, evaluators are selected for their expertise and special understanding of local communities.

SCHOLARSHIP SELECTION COMMITTEE

Roughly 1,200 volunteer scholarship selection committee members work to identify worthy recipients and to ensure that the original intent of each donor's fund is carried out.



COMMUNITY FUND ADVISORS

Community funds are developed by individuals or groups of donors to address a specific community need or geographic concern. OCF's community fund advisors then develop recommendations for program direction and the selection of grant recipients.

SPECIAL PROJECT VOLUNTEERS

Community members can volunteer for various special projects, such as community outreach, research or providing OCF with special expertise.

"I'M AMAZED AT HOW MUCH THE WALKER FUND BENEFITS JACKSON COUNTY. THE MORE I SEE, THE MORE ENTHUSED I AM!"

ONE GRANT EVALUATOR SAID, 'I'D WALK ACROSS HOT COALS TO SUBMIT THE RECOMMENDATION FOR THIS GRANT APPLICANT.' I THINK THAT'S HOW MOST OF US FEEL WHEN WE LOOK AT THESE WONDERFUL ORGANIZATIONS THAT NEED FUNDING."

ANNA DUNLAP

GRANT EVALUATOR FOR THE REED AND CAROLEE WALKER FUND, WHICH SUPPORTS PROGRAMS FOR DISADVANTAGED POPULATIONS IN JACKSON COUNTY.

Programs and Priorities

OCF's charitable funds consist of gifts and bequests made by our donors, which include individuals, families, nonprofit organizations, and businesses.

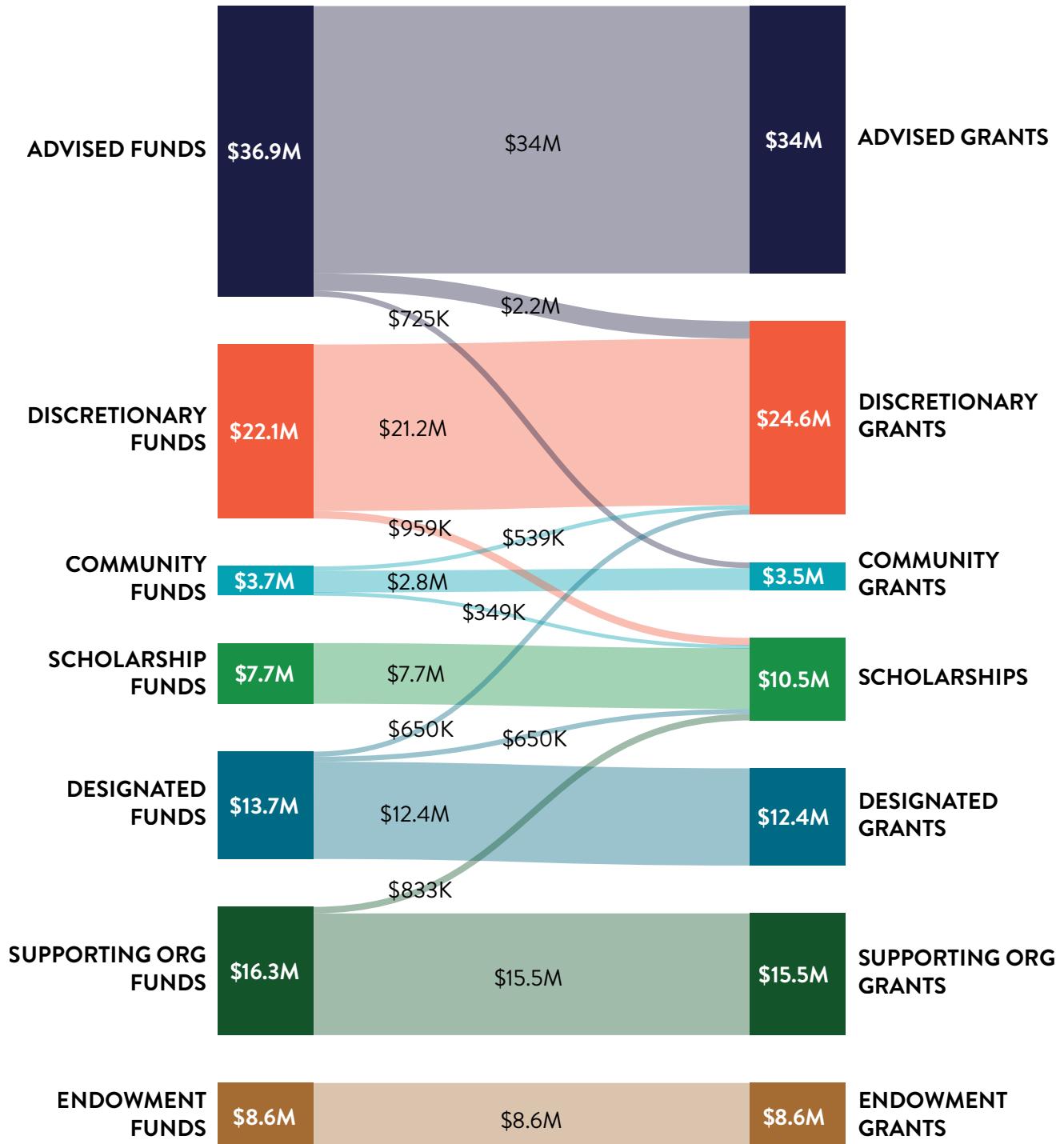
OCF awards grants and scholarships from these funds to support a wide variety of people and organizations.

TYPES OF FUNDS

- **Discretionary funds.** The donor establishes a fund, and distributions are made at the discretion of OCF's board. These funds may be restricted to a specific region or issue. Grants from these funds typically meet current needs such as education or health.
- **Donor advised funds.** The donor offers recommendations to OCF's board regarding distributions from the fund. Donors may choose to name successor advisors (e.g., their children) to build a legacy of giving. Corporations can also create advised funds where an authorized representative makes grant recommendations.
- **Community advised funds** target specific fields of interest, such as young children or performing arts, advised by committee members with interest and expertise in the topic addressed.
- **Donor designated funds** provide annual support to one or more donor-chosen charitable organizations. If an organization ceases to be viable, OCF's board will make grants to a similar organization.
- **Endowment partner funds.** A charitable organization transfers its endowment to OCF and receives annual distributions.
- **Scholarship funds** include postsecondary academic or vocational scholarships, sometimes for graduates of a specific region or high school.
- **Supporting organizations** further OCF's mission through a unique legal relationship—each with its own board, grantmaking priorities and processes.
- **Pooled funds** accept gifts of any size. The OCF Leadership Fund promotes philanthropy across Oregon. The Oregon Fund addresses critical needs throughout the state. And the Oregon Scholarship Fund awards more than 100 scholarships each year to post-secondary Oregon students who demonstrate financial need, academic promise and strong character.

Flow of Funds

The majority of funds only make one type of grant. However, discretionary grants and scholarships are funded from a variety of sources.



STARTING A FUND

Our charitable gift planners work closely with prospective and current donors, reviewing their philanthropic goals and helping them understand how to get the maximum charitable and tax benefits from their fund.

Donors can create a named OCF fund with a minimum contribution of \$25,000 for an advised fund or \$50,000 for a scholarship fund. Alternatively, they can build a permanent fund over time, starting with a contribution of \$5,000 or more.

- **Cash gifts** include currency as well as checks or money orders made payable to Oregon Community Foundation.
- **Appreciated property.** Gifts of appreciated securities or real estate often allow donors to make a substantial contribution while receiving valuable tax advantages. Also, the capital gain from the donated asset passes tax-free to OCF.
- **Testamentary and life income gifts.** Donors who include OCF in their estate planning can make charitable gifts while enjoying tax benefits and preserving their economic security. Options include bequests, trusts, annuities and life insurance gifts. Learn more at oregoncf.org/ways-to-give/choose-your-fund/estate-planning-or-life-income-gift.
- **Private foundation.** A private foundation may transfer its assets to OCF to establish a donor advised fund or supporting organization. The private foundation may retain its name and philanthropic goals with no tax or penalty on the transfer. OCF staff can provide professional advice on complex gift transactions and can execute deferred gifts — such as charitable gift annuities — for the foundation's donors.
- **Other gift types** include personal property, stock in privately held companies, limited partnerships, and company stock options (with the exception of employee stock options).

LEARN MORE: oregoncf.org/ways-to-give



"OCF HAS A REAL BASIC BELIEF, PREMISE AND DRIVE TO IMPROVE THE QUALITY OF LIFE FOR OREGONIANS."

WHEN IT COMES DOWN TO IT, WE ALL WANT THAT. BUT IT TAKES A LOT OF WORK, AND IT TAKES A LOT OF REALLY DEEP DIGGING AND LISTENING AND BEING GOOD PARTNERS."

MARY BLAKE
NORTH COAST LEADERSHIP COUNCIL

Growth of the OCF Endowment

Endowment growth over time varies by fund type. The OCF Endowment consists of seven types of funds. The charts below show the endowment value between 2004 and 2019 by fund type in millions of dollars. Amounts are not adjusted for inflation.

ALL FUNDS

Change since 2004: 329%

Change since 2017: 103%

\$2.26 Billion

2004

2018

DONOR ADVISED FUNDS

25% of Total Endowment

\$566M

DISCRETIONARY FUNDS

20% of Total Endowment

\$453M

DESIGNATED FUNDS

16% of Total Endowment

\$354M

ENDOWMENT PARTNER FUNDS

8.7% of Total Endowment

\$198M

SCHOLARSHIP FUNDS

5.6% of Total Endowment

\$127M

COMMUNITY FUNDS

2.5% of Total Endowment

\$57M

SUPPORTING ORG FUNDS

22% of Total Endowment

\$501M

ADMINISTRATIVE FUNDS

0.37% of Total Endowment

\$8M

Grant Programs and Grantmaking



COMMUNITY GRANT PROGRAM

This program awards grants twice each year, primarily to small and midsize nonprofits. Application deadlines are January 15 and July 15. The average grant is \$20,000, with \$3 million or more awarded in each cycle. OCF receives about 400 applications per cycle, of which roughly 175 receive funding.

These grants support the following goals:

- Health and well-being of vulnerable populations: 30-40%.
- Educational opportunities and achievement: 30-40%.
- Arts and cultural organizations: 15-25%.
- Community livability, environmental health and citizen engagement: 10-20%.

LEARN MORE: oregoncf.org/community-grants

OTHER COMPETITIVE GRANTS

- **Creative Heights.** A four-year initiative to help arts and culture organizations test new ideas and stretch their creative capacity.
- **Small Arts and Culture Grants.** A five-year initiative to support small, community-driven arts and culture organizations statewide.
- **Ready to Learn Grants.** These statewide grants focus on programs that benefit young children.
- **Reed and Carolee Walker Fund Grants.** Awarded in Jackson County, these grants focus on disadvantaged children and families.
- **Nike Employee Grant Fund Program.** Awarded in Clackamas, Columbia, Multnomah, Washington and Yamhill counties in Oregon, and Clark County in Washington.

Other competitive grant programs are organized by region and subject.

LEARN MORE: oregoncf.org/research

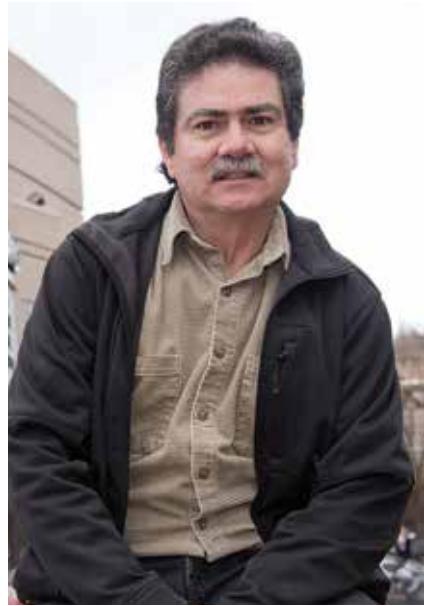
ONLINE RESOURCES

- **Council on Foundations**
cof.org
- **Independent Sector**
independentsector.org
- **Oregon Volunteers!**
oregonvolunteers.com
- **Chronicle of Philanthropy**
philanthropy.com
- **American Institute of Philanthropy**
charitywatch.org
- **The Foundation Center**
fdncenter.org
- **Grantmakers of Oregon & Southwest Washington**
gosw.org
- **Philanthropy Northwest**
philanthropynw.org
- **Social Venture Partners**
svpportland.org

Special Programs and Strategic Initiatives

OCF's board of directors may approve special programs and initiatives to address particular opportunities or areas of need. Examples include:

- **Black Student Success.** OCF works alongside community leaders to help build capacity and leadership, and to scale proven models that improve outcomes for Oregon's Black children.
- **Chalkboard Project.** Improving K-12 teacher and leader effectiveness throughout our state.
- **Children's Dental Health Initiative.** Addresses the crisis of childhood dental disease by building private and public partnerships to improve children's oral health.
- **GO Kids.** Works with OCF volunteers statewide to raise awareness of Oregon's "opportunity gap" created by widening disparities for children based on where they live, their race or family circumstance.
- **Latino Partnership Program (LPP).** Aims to incorporate the voice and perspective of Latino communities in all of OCF's major programs and operations, support the education and achievement of Latino students, support and increase Latino leadership, and promote cross-cultural experiences.
- **Parenting Education.** Invests in programs that strengthen, expand and deliver community-based parenting education services.
- **Small Arts and Culture Program.** Provides grants to Oregon's smallest arts and culture organizations, allocated proportionally to OCF's eight regions.
- **Economic and Community Vitality.** Makes grants focused on developing a skilled workforce, supporting entrepreneurship and promoting job creation.
- **Natural Resources.** Works with donors, community leaders and other foundations to create regional, place-based solutions to preserve and protect natural places, quality of life and economies.



"IT'S GREAT THAT OCF PULLS IN VOLUNTEERS FROM RURAL OREGON. THE VOLUNTEERS CERTAINLY ADD LOCAL PERSPECTIVE FROM KNOWLEDGE OF THE LOCAL COMMUNITY."

FRANK HERNANDEZ
OCF VOLUNTEER GRANT EVALUATOR
KLAMATH FALLS

Scholarships

"SERVING ON A SCHOLARSHIP COMMITTEE BECAME A CATALYST FOR ME TO FIGURE OUT HOW TO MAKE A GREATER IMPACT ON EQUITY IN EDUCATION."

MY MOST MEMORABLE EXPERIENCE HAS BEEN THE STORIES – HEARING ABOUT FRED FIELDS' LEGACY FROM FELLOW COMMITTEE MEMBERS, READING THE APPLICATION ESSAYS CAPTURING THE CHALLENGES OVERCOME AND DREAMS OF STUDENTS FROM ALL WALKS OF LIFE, AND GETTING THANK-YOU LETTERS FROM RECIPIENTS TALKING ABOUT THE IMPACT SCHOLARSHIP HAVE HAD ON THEIR LIVES."

JUSTIN YUEN
FRED W. FIELDS SCHOLARSHIP COMMITTEE VOLUNTEER

OCF's statewide scholarship program is one of the largest of its kind in the country. In 2019, scholarship awards totaling approximately \$11.6 million reached more than 3,600 students. Recipients were 59% low income, 50% were the first generation in their families to attend college and 60% were rural. These awards originated from roughly 500 distinct scholarship funds established by individuals, families, schools, businesses and civic organizations.

In some OCF scholarship programs, donors may participate in selecting recipients. In others, a committee consisting of school or community volunteers makes the selections.

The average scholarship award for the 2018–2019 academic year was \$2,953. The Foundation's total permanent endowment of scholarship funds exceeds \$100 million.

In addition to these individual scholarship programs, the Foundation administers an institutional scholarship program that allows donors to select an educational institution to receive funds. Every year, OCF awards approximately \$3 million in scholarships through this separate grant process.

LEARN MORE: oregoncf.org/grants-and-scholarships/scholarships/



Promoting Oregon Philanthropy

As an ambassador for OCF, you can further our mission by promoting the community benefits and life-changing personal rewards of philanthropy whenever and wherever you can.

Working with OCF will bring you into contact with countless inspiring examples of local philanthropy. We hope you will share these stories with others!

10 WAYS YOU CAN PROMOTE GIVING IN OREGON

1. Tell your professional advisors about OCF's services and the benefits for donors and for Oregon communities.
2. Let people know there's more to philanthropy than simply donating cash. Help them find out about all their options, from volunteering to planned giving.
3. Use social media to promote causes you care about, current opportunities for community involvement, and inspirational stories about philanthropy in Oregon.
4. When you give, make your gift a challenge to be matched by others.
5. Create a giving circle: Pool money with family and friends, and decide together where to make your charitable contribution.
6. Share personal stories about your involvement in philanthropy and its personal and community benefits.
7. Get your children involved in philanthropy early. Research shows that children whose parents talk to them about charitable activities are 20% more likely than others to give as adults.
8. Promote philanthropy and encourage high aspirations for Oregon through op-eds and letters in newspapers and online media.
9. Create or contribute to a scholarship fund that benefits students in your community or field.
10. Make sure your own estate plan includes a contribution to the causes you care about most.

OCF SOCIAL MEDIA

Follow OCF and spread the word about the vital work we're doing!



[facebook.com/
TheOregonCF](https://facebook.com/TheOregonCF)



[instagram.com/
the_ocf/](https://instagram.com/the_ocf/)



[twitter.com/
TheOregonCF](https://twitter.com/TheOregonCF)



[youtube.com/user/
oregonCF](https://youtube.com/user/oregonCF)

Your role as an OCF ambassador includes all online interactions, so please honor our guidelines for professionalism, honesty and confidentiality when posting on social media.

The Role of Professional Advisors



Ron and Karel Bennett were successful California property developers who moved to Oregon in the 1980s. After Ron passed away, Karel asked her attorneys Bernie Moore (above) and Stephen Jamieson to create a scholarship for students seeking engineering or business degrees. As an estate and tax attorney, Stephen knew that OCF was the best choice to manage the fund.

Because Bernie had known the Bennetts well, OCF asked him to chair the scholarship committee. In this role, he sees firsthand how the Bennett Fund changes people's lives.

"OCF makes it painless," Bernie says. "They give us everything we need to make good decisions. They make it very easy for us."

OCF works with lawyers, accountants, estate planners and other professional advisors to make sure their clients' philanthropy achieves the greatest possible benefits.

- **Simplicity.** We help donors decide how, when and where to give. Our administrative services include accounting, auditing, financial management, due diligence, grantmaking and evaluation.
- **Flexibility.** OCF's deep experience lets us help donors with diverse philanthropic goals, such as donating to multiple charities, setting up scholarship programs or creating a personal or family legacy.
- **Reliability.** Donated assets are professionally managed in a large, diversified portfolio according to the investment policy established by OCF's board. Each fund is pooled and invested as part of the Foundation's total assets. This results in lower management fees, greater investment diversification and minimized investment risk.
- **Expertise.** Our charitable gift planners are experienced in managing gifts and assets of all types, including life insurance benefits, IRAs, assets held in a family-owned business or closely held company, and gifts that provide an income stream from appreciated assets.
- **Financial benefits.** As a public charity, OCF offers maximum tax deductions and other financial advantages that are not available to private foundations.

LEARN MORE: oregoncf.org/advise



OCF Research Program

OCF's research program conducts internal evaluations of the Foundation's programs and initiatives, in addition to contracting with external researchers to analyze OCF funds and the topic areas, regions and populations supported by OCF grants. These evaluations inform our priorities, activities and operations; provide an impartial analysis of Oregon's most pressing issues; and measure the outcomes of our programs and initiatives.

OCF is also committed to increasing the quality and availability of impartial research and information on Oregon's people, communities, philanthropic trends and nonprofit sector. To that end, we are engaged in several ongoing research projects.

GIVING IN OREGON

OCF produces the Giving in Oregon report on statewide philanthropy, which uses IRS data to track charitable contributions made by individual Oregonians and donations received by Oregon nonprofits. The report compares state and national data, and analyzes current trends by sector and county.

TRACKING OREGON'S PROGRESS (TOP INDICATORS) PROJECT

OCF partners with Oregon State University's Rural Studies Program and Extension Service to track longitudinal indicators of Oregon's economy, people, communities and environment. In addition to producing a statewide report, we have created a TOP Indicators website that allows users to generate custom reports comparing counties or areas of interest. The project also includes annual reports on important issues. OCF hopes the reports and website will help policymakers, government analysts, the press, business and civic leaders, and engaged citizens to understand current social, economic and environmental conditions in Oregon.

SUPPORT FOR OTHER RESEARCH

OCF is proud to support partner organizations conducting valuable research on Oregon. In 2013, OCF was one of four funders of the Oregon Values and Beliefs Survey, which was conducted by DHM Research. OCF was also a funder of the Oregon Nonprofit Sector Report conducted by Portland State University and the Nonprofit Association of Oregon. More recently, OCF supported the first study in more than 20 years of the status of Oregon girls and women, which was commissioned by the Women's Foundation of Oregon.

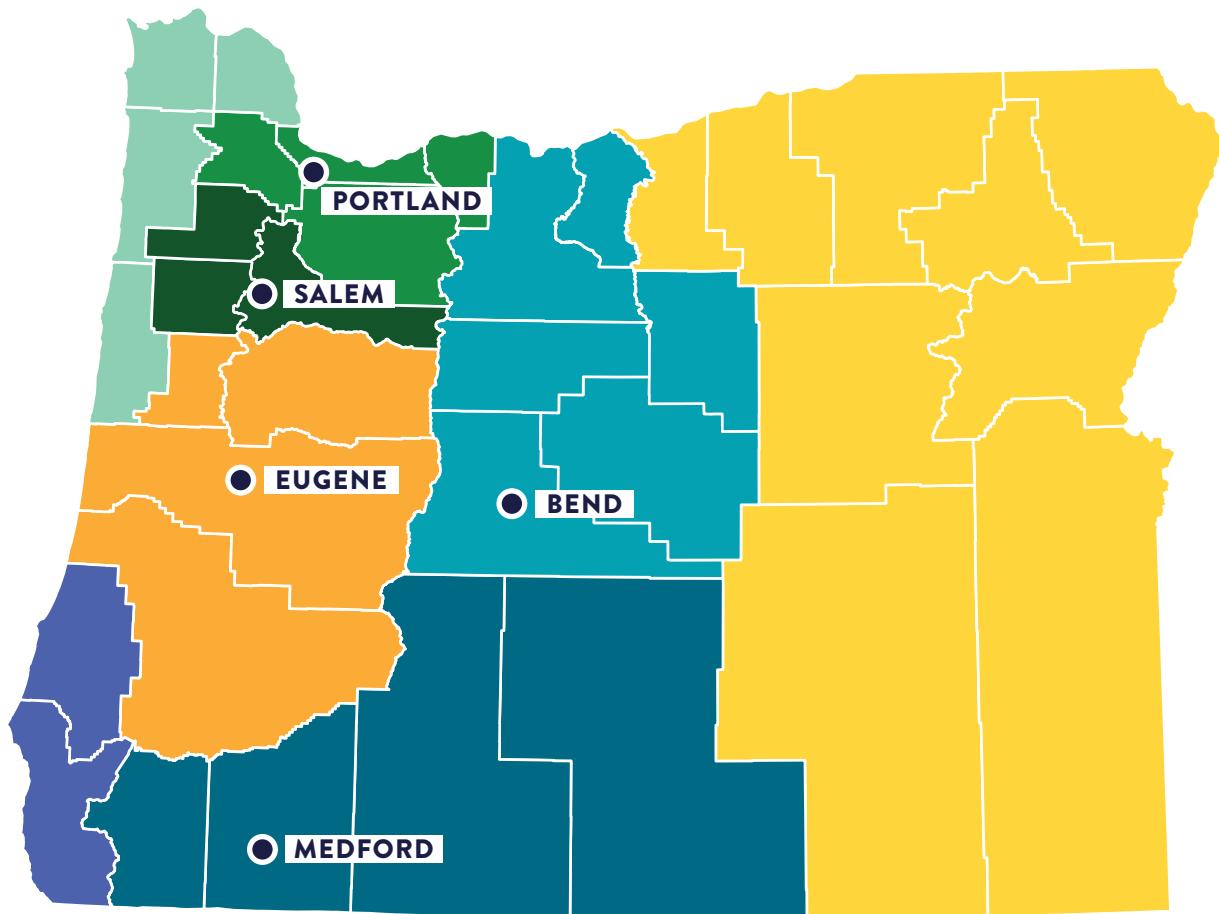
LEARN MORE: oregoncf.org/research

The image shows the front cover of the 2018 TOP (Tracking Oregon's Progress) report. The cover is orange with white text. At the top right, it says "2018" and "TOP" above "TRACKING OREGON'S PROGRESS". Below this is a black and white photograph of two young girls wearing hairnets and aprons, smiling and holding bags. At the bottom left, there is a small logo for "Oregon Community Foundation".

The image shows the front cover of the May 2019 Learning What Works report. The cover is dark blue with white text. At the top right, it says "MAY 2019" and "Learning What Works" above "for School-Based Dental Health Programs" and "THE OREGON CHILDREN'S DENTAL HEALTH INITIATIVE". Below this is a black and white photograph of a young girl in a pink shirt brushing a purple stuffed animal's teeth. At the bottom left, there is a small logo for "Oregon Community Foundation".

OCF By Region

OCF divides our state into eight regions, each of which is served by one of OCF's five offices.



CENTRAL OREGON

SERVED BY BEND OFFICE

Crook, Deschutes, Jefferson, Sherman, Wasco and Wheeler Counties and The Warm Springs Reservation

EASTERN OREGON

SERVED BY BEND OFFICE

Baker, Gilliam, Grant, Harney, Malheur, Morrow, Umatilla, Union and Wallowa Counties

METROPOLITAN PORTLAND

SERVED BY PORTLAND OFFICE

Clackamas, Hood River, Multnomah and Washington Counties

NORTH COAST

SERVED BY PORTLAND OFFICE

Clatsop, Columbia, Lincoln and Tillamook Counties

NORTHERN WILLAMETTE VALLEY

SERVED BY SALEM OFFICE

Marion, Polk and Yamhill Counties

SOUTH COAST

SERVED BY EUGENE OFFICE

Coos and Curry Counties

SOUTHERN OREGON

SERVED BY MEDFORD OFFICE

Jackson, Josephine, Klamath and Lake Counties

SOUTHERN WILLAMETTE VALLEY

SERVED BY EUGENE OFFICE

Benton, Douglas, Lane and Linn Counties

OCF Departments

OCF's expert staff helps our donors achieve their charitable goals and works to strengthen Oregon nonprofits. [LEARN MORE: oregoncf.org/about/our-people/staff](http://oregoncf.org/about/our-people/staff)

EXECUTIVE



MAX WILLIAMS
President & CEO

- Board Relations
- Executive Administration
- Strategic Plan Implementation
- Strategic Projects

GRAY FAMILY FOUNDATION



NANCY BALES
Executive Director

- Supporting organization of Oregon Community Foundation

COMMUNICATIONS



STEPHANIE SWANSON
Vice President of Communications

- Marketing
- Communications

PEOPLE & CULTURE



MARIANN HYLAND
Vice President of People & Culture

- Equity, Diversity & Inclusion
- Human Resources
- Staff Development & Culture

COMMUNITY IMPACT



SONIA WORCEL
Chief Community Impact Officer

- Community Engagement
- Community Grants
- Discretionary Funds
- Designated Funds
- Grant & Scholarship Programs
- Regional Strategies
- Research

PHILANTHROPIC SERVICES



KIRSTEN KILCHENSTEIN
Chief Philanthropy Officer

- Charitable Gift Planning
- Donor Outreach
- Fund Development
- Advised Fund Grants
- Donor Advised Services
- Family Giving Center

FINANCE & OPERATIONS



ERICA D. DALEY
Chief Financial and Operations Officer

- Endowment Partners Investments
- Gift & Fund Processing & Distribution
- Supporting Organizations

TECHNOLOGY



ART FRANK
Director of Technology Services

- Technology
- Infrastructure
- Database Systems & Reporting
- Facilities
- Operations

PORLAND 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	EUGENE 440 E BROADWAY SUITE 160 EUGENE, OR 97401 (541) 269-9650	MEDFORD 818 W EIGHTH ST. MEDFORD, OR 97501 (541) 773-8987	SALEM 530 CENTER STREET NE, SUITE 230 SALEM, OR 97301 (503) 779-1927
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Oregon Community Foundation

Conflict of Interest and Confidentiality Information Form

Thank you for getting involved with Oregon Community Foundation!

OCF has been certified through the Council on Foundations' National Standards Program. As part of this certification, OCF is required to adopt the following conflict of interest policy and to share it with all staff, board members and volunteers.

The full text of OCF's conflict of interest policy is online at oregoncf.org/about/our-people/volunteers/resources-for-volunteers. After reading that text, please sign this form and return one copy to:

Oregon Community Foundation
1221 SW Yamhill St.
Suite 100
Portland, OR 97205

Please list any personal or business relationships, positions or circumstances that you feel could contribute to a conflict of interest as defined in Oregon Community Foundation's Conflict of Interest Policy:

- I hereby certify that the information set forth above is true and complete to the best of my knowledge.
- I understand that OCF is a charitable organization and that in order to maintain its federal tax exemption, it must engage primarily in activities that accomplish one or more of its tax-exempt purposes.
- I understand that in my role at OCF, I will be exposed to confidential information regarding OCF donors and grant applicants. I agree to maintain the confidentiality of all such information.
- I have read and understood OCF's conflict of interest policy, and I agree to abide by its terms.

Signature _____ Date _____

Thank you!



The mission of Oregon Community Foundation is to improve lives for all Oregonians through the power of philanthropy.

OCF puts donated money to work for Oregonians—\$100 million in grants and scholarships annually. Since 1973, OCF grantmaking, research, advocacy and community-advised solutions have helped individuals, families, businesses and organizations create charitable funds to improve lives for all Oregonians.

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(503) 779-1927

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