



Here for Oregon. Here for Good.

*Mission, Vision and Values Statement  
for the family and board members.  
Not to be shared publicly.*

## **[Family Name] Foundation Mission, Vision and Values**

### **Mission and Vision**

The [Family Name] Foundation believes that strong communities depend on people having successful, productive and meaningful lives. When people are given the tools they need to thrive, they develop a strong sense of self-worth, are motivated to succeed and empowered to improve their own lives and the lives of others. The Foundation envisions creating such pathways for success through philanthropy.

### **Family Philosophy and Values**

The [Family Name] Foundation was created for current and future family members to give together. Engagement with philanthropy should be rewarding and voluntary. Family members will be invited to participate but do not have an obligation to do so.

In addition to our collective philanthropy, we encourage all individual family members to follow their unique passions and establish their own charitable identities as they contribute to the greater community. The family supports lifelong learning about giving and how to best align personal passions with making charitable choices.

We believe it is our responsibility to give back because we have more than we need. Leading by example, we encourage others to give back to their communities so that we all may leave things better than we found them.

The values that guide charitable giving from the Foundation reflect the family's connection to one another as well as connections to community and the traditions of [Family Name] Enterprises. We value:

- Community and social responsibility
- Education and lifelong learning
- Honoring, learning from and preserving the past
- Innovation and opportunity
- Personal growth and development
- Integrity and trust



*Here for Oregon. Here for Good.*

*Mission, Vision and Values Statement  
for the family and board members.  
Not to be shared publicly.*

## **Charitable Interests:**

The [Family Name] collectively supports the following interests:

- Learning opportunities – removing obstacles to learning and promoting positive development of the whole of a person.
- Healthy thriving communities
- Community projects that improve quality of life

## **Family Approach to Grantmaking**

The foundation will focus its grants in the family's communities.

The foundation prefers making grants for special projects, rather than providing ongoing operating support for organizations.

The foundation favors organizations that can demonstrate their effectiveness at achieving their mission and demonstrate how their work aligns with the [Family Name] Foundation's objectives.

The foundation's grantmaking will be flexible, allowing for grants to be made in a range, depending on the desired outcome. We have a preference of grants at a \$5,000 minimum.

Grantmaking decisions will be no more than four times a year. There will be flexibility for grants made for family interests at other times.

The Family believes in making decisions by consensus. When we do not all agree with a decision and recognize that consensus is not possible, we will respect the majority's voice.

## Inspired Mission Statements From Individuals And Family Foundations

1. **I seek to reduce the amount of violence within families in my community.** I do this by supporting family violence prevention programs, volunteering ten hours a month on parent telephone hotlines that seek to reduce stress in families, continuing my ten-year commitment as a Big Brother, and advocating for laws that punish crimes of violence against families and that protect victims of violence.
2. **I want to see social justice, economic redistribution, and racial harmony.** Therefore, I work for, donate to, and volunteer with organizations that involve ordinary people in confronting and changing the institutions and public policies that affect their lives. I especially like to support those organizations in which I am personally involved, or where I know leaders of the organization.
3. **I want to help immigrants to this country.** Everyone in my family from my grandparents' generation were immigrants and the country has been good for us. I fund groups that give immediate support to immigrants and help them obtain good free or low-cost legal aid.
4. **The Compassionate Soul Fund exists to model gift giving and to raise consciousness about women's multiple contributions to the world.** We fund feminist projects for social change and human rights, especially those that serve and are headed by indigenous women and women of color.
5. **The Seed Fund exists to provide seeds to low-income communities for gardening and soup kitchens.** We are a group of organic farmers who believe that healthy food and hands-on growing and cooking of food can change the health and well-being of any community. We make contributions of money and/or seeds to schools and projects that distribute seeds, and we establish community gardens and teach sustainable gardening.
6. **I believe that camp should be an experience available to all kids.** I've seen children gain enormous self-confidence, skills, and new friends through camp experiences that have helped transform their lives. Our family has established the Campers Fund to give scholarships to low-income and disabled children who have never been to camp before. It is our family goal to help two to four kids per year with \$500 to \$750 each for scholarships to the summer camp of their choice.

7. **The two areas in my life that I have a strong passion for are music and work against racism.** I serve on the board of a local music program that provides music training both for inner-city kids who cannot afford lessons and for schools and communities whose music programs have been cut. I am using my professional knowledge on the finance committee and I'm managing the endowment fund. I give monthly to this organization, which will also receive a bequest through my will.
8. **I seek to reduce the effects of industrial pollution on the environment.** I believe that grassroots action by communities to oppose pollution in their neighborhoods is one effective way to address this issue. Therefore, I donate to nonprofit groups that confront this issue at the local level.
9. **As a couple that has lived in this region for some time, we believe in supporting this community and its sustained economic and cultural development.** Through our donor-advised fund at the local community foundation we make multi-year grants to groups that provide job training program and micro-enterprise loans to individuals.
10. **I believe that nothing can positively affect a person's life more than a good education.** Therefore I devote whatever extra money and time I have to helping students get access to the best educational opportunities available
11. **Our family's goal is to bring creative expression to our community.** We fund art and photography classes for inner city and rural young people, and we established a summer community arts program that works with more 200 young people in our town each summer. In addition, we buy art from emerging artists for personal investment and joy.

**SOURCE:** Tracy Gary & Melissa Kohner. *Inspired Philanthropy: Your Step-By-Step Guide To Creating A Giving Plan*, Chardon Press Series. Published by Jossey-Bass, A Wiley Imprint, San Francisco, CA, 2002.

## **BBBB Fund of The Oregon Community Foundation Statement of Purpose**

### **Mission:**

The fund advisors of the BBBB Fund believe in the importance of education; creating opportunities for individual and community growth; generosity towards their fellow man.

### **Funding Priorities:**

The BBBB Fund will focus on providing support for:

- All levels of education with a special interest in access and opportunity,
- Children and teens with a special interest in extracurricular activities, special programs, and neglect and abuse prevention.

### **Geographic Focus:**

Grants may be made anywhere in Oregon

### **General Guidelines:**

Elements of each of the following interest areas will be used as filters in identifying projects to share with the fund advisors.

- Education
  - Promotes learning values
  - Involves programs that lowers the dropout rate
  - Prevents other issues
  - Encourages inclusive opportunities to learn
- Children / Teens
  - Addresses things kids lack in their family life
  - Addresses child abuse and neglect
  - Promotes athletics and special programs in schools
- Animals
  - Prevents neglect
  - Provides a home
- Volunteering / Community Service
  - Provide people opportunities to give back to the community and do good
  - Support programs that give kids the chance to give time and feel good about themselves
- Jobs
  - Creation of jobs

- Access to jobs
- Environment
  - Preserve open spaces and keep them available for the public
  - Conserve natural habitats and the animals that live there
  - Provides opportunities and facilities for outdoor sports

**Procedures:**

- Each fall ten projects will be shared with the fund advisors for consideration.
- A primary contact will be responsible for gathering the advisors to discuss the projects, develop funding recommendations, and communicate those recommendations with The Oregon Community Foundation.
- The opportunity to act as the primary contact for the BBBB Fund will be periodically rotated amongst the fund advisors.
- \_\_\_\_\_ has the first opportunity.

# **XXXX Family Fund of The Oregon Community Foundation**

## **Statement of Purpose**

### **Mission**

The mission of the XXXX Family Fund is to improve life in Oregon. The Fund will accomplish this by helping assure the healthy development of the state's children and young people, encouraging Oregon's rural youth to explore a variety of positive life options, and by providing resources for Oregonians in crisis to help themselves.

### **Funding Priorities**

The Fund has special interest in making grants for the following:

- Mentoring programs that provide companionship and positive role models for kids
- Youth athletics that promote leadership and teamwork
- Early childhood education
- Health education and primary health care services to prevent disease
- Mentoring, counseling, providing resources, and other methods to encourage young people who are average students to seriously consider and prepare for college careers
- Leadership programs that give young people opportunities to learn about and discuss contemporary issues
- Assisting women and children who have experienced domestic violence gain the security, material goods and life skills they need to leave abusive relationships
- Helping victims of natural disasters with emergency assistance
- Providing support services to people with chronic diseases to increase their quality of life

Preference will be given to organizations that use volunteers and to projects that tangibly help people, rather than support for capital projects or organizational development.

### **Geographic Focus**

Grants may be made anywhere in Oregon, but emphasis will be placed on projects in Central Oregon, Eugene, and McMinnville.



## **The [Family Name] Foundation Fund of the Oregon Community Foundation**

### **Philosophy and Values**

The values that guide charitable giving from the [Family Name] Foundation Fund honor [Donor Names] and reflect the family's connections to one another, to the community and to the traditions of [Family Business Name]. These values include:

- A sense of responsibility, integrity and service to Oregon, which has given much to the [Family Name] Family.
- Belief in the powers of creativity, art, education and humor to bring joy and health to people and communities.
- Compassion for those who are less fortunate and tolerance for those who are different.
- Commitment to the wise and sustainable use of natural resources.

### **General Priority Areas for Grants**

#### *Arts and Culture Organizations*

Priority will be given to supporting museums, schools and performing arts organizations with emphasis on building organizations' strength and stability, and on specific projects to enhance music and art education for children, bring high quality performances and exhibits to broad audiences, and inspire additional giving to the arts.

#### *Environment*

Grants will be made for environmental education to educate the public about sustainable resource practices and about the importance of balanced systems to the health of the earth's environment and people.

#### *Health*

The Fund will support smaller projects that make a tangible difference, such as projects that improve the comfort of children and adults undergoing cancer treatment or to provide basic physical, mental and dental health care to children and adults in poverty.

#### *Vulnerable Children and Teens*

Support will be given for a wide range of projects that enhance education, positively influence youth development, help children who are struggling and protect children from harm.





## **Funding Strategies**

- Support the most pressing needs of nonprofit organizations, whether program or capital.
- Consider support to the same organizations over several years, but avoid dependence by an organization on the Fund for survival.
- Focus grantmaking primarily in Greater Portland and Salem areas.
- Whenever possible leverage the Fund's investments to attract other resources.
- Give grants that make the organization's application worthwhile, (e.g. aim for most grants at the \$10,000 level or above, but maintain flexibility to occasionally make smaller grants)
- Benefit as many people as possible with the Fund.
- Favor projects with tangible, measurable outcomes—make a difference.