

## MEMORANDUM

**Date:** May 15, 2017

**To:** National Center for Family Philanthropy Community Foundation members

**From:** Laura Winter, VP for Donor Relations, The Oregon Community Foundation

**RE:** Deepening family services at a community foundation

The following document is the business plan developed by The Oregon Community Foundation (OCF) to prepare for the launch of our Family Giving Center. The Center will offer a suite of services for individuals and families who want to engage the next generation and deepen their giving strategies. This plan was developed over an 18-month period and involved input from staff across the foundation. OCF developed an Ad Hoc Committee of current and past board members, including a family with a multi-generational charitable trust and the executive director of our regional association of grantmakers. The committee met several times to provide feedback and direction. This collaborative process culminated in August 2016, when the OCF board of directors approved the business plan and committed to a three-year investment from operating reserves to add staff and strengthen the infrastructure to support the expansion.

Currently, OCF is implementing the activities outlined in the business plan, which include creating administrative processes, developing program content and curricula and crafting a marketing plan and brand for the Center. Staff continue to hone their expertise in multigenerational giving strategies. The business plan document does not reflect the Family Giving Center brand.

OCF was positioned to launch the Family Giving Center because of the deep, multigenerational relationships we have with our donors. The Foundation values our long tradition of working closely with donor families across generations. We have partnered with donors in a variety of ways—including engaging them in partnering on foundation priorities and programs. For decades, donors have been co-funding foundation initiatives and programs as well as proposals received through OCF's competitive grantmaking programs. We have established a culture of collaboration, and we view this culture as a prerequisite to launching the Family Giving Center. Our deep relationships also extend beyond donors to our network of professional advisors who know and trust OCF.

OCF's culture of commitment to donor services was key to making this possible. The following document includes information provided to the OCF board in August 2016. We are excited about the opportunities ahead and look forward to learning from our fellow NCFP colleagues to advance our collective skills and expertise.

# BUILDING A FAMILY GIVING CENTER



THE OREGON  
COMMUNITY  
FOUNDATION





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# EXECUTIVE SUMMARY

For over 41 years, The Oregon Community Foundation has offered individualized services to our advised fund donors. These services include a donor relations officer (DRO) who assists donors in reaching their charitable goals, strengthens their relationship with OCF, and helps families give together across generations.

Today, our Donor Relations team is being stretched thin by a tremendous growth in donor advised funds (DAFs) and family requests for specialized services. In response, we have the opportunity to broaden our offerings by launching a Family Giving Center. This will formalize and improve work OCF is already doing, while also meeting the stated needs of donors and expanding our services to families whose philanthropy occurs outside OCF.

The Center will provide some complimentary services to families with funds of a certain size, while offering a fee-based menu of services for other families. It will also create a framework for providing fee-for-service support to families who give outside OCF.

The Family Giving Center will position OCF as Oregon's comprehensive resource for intergenerational giving. Through its customized services, the Center will bring Oregon families together to give across generations to enrich the communities they care about.

## KEY FINDINGS

As part of the planning process for the Family Giving Center, we analyzed 2014 data to identify revenue and expense associated with managing DAFs. We considered fund size and activity, administrative fees, and donor services. This analysis offers a new perspective on our alignment of services and administrative fees (see page 3).

Our findings have already informed the Donor Relations department's effort to rethink our current delivery of donor services while making sure that we continue to provide prompt and responsive service to all donors.

The data have also enabled us to identify a size threshold for funds that will receive complimentary family services as opposed to fee-based services. This will ensure both

that our specialized services are supported by funds of an adequate size and that we can negotiate effectively with all donors who fall under a fee-for-service model. Based on our analysis, the Family Giving Center will break even and become profitable in 2020.

## THE NEED FOR A FAMILY GIVING CENTER

- Families with advised funds are already asking OCF for this service. The Family Giving Center will impose form and structure on our ongoing efforts to help families navigate multigenerational giving.
- The Family Giving Center will diversify OCF's revenue sources, providing fee-for-service income as well as administrative fees. This is especially important in years projected to have lower market returns.
- The Family Giving Center will establish a durable framework for providing OCF services to private family foundations, many of which have contacted us in recent years to seek services and support.
- A significant transfer of wealth is now underway. National data predict that \$6 trillion will change hands over the next 30 years. Competition will increase as nonprofits seek major gifts and state universities target the same prospects as OCF.
- Our research shows that there is increasing demand for multigenerational family services, but no one else in Oregon is providing them with OCF's level of expertise. Therefore, a Family Giving Center would position OCF to be Oregon's go-to source for trusted, expert help with multigenerational giving.
- OCF has a robust research department, as well as unmatched local expertise. Thus, we are much better positioned than most of our competitors to help donors develop effective family giving strategies.
- DROs have traditionally been the focus of relationship management for all DAFs. However, we are now moving toward a team support approach, engaging associates to assist donors with simple transactional requests and questions. This will allow DROs to focus on relationship management and family giving services.

## MARKET ASSESSMENT

A major gap exists in the market for family giving services in Oregon. The current lack of competition is a major but temporary advantage for OCF, which justifies acting sooner rather than later. However, efforts to quantify this market are unlikely to justify the time and expense they would entail. Because work of this kind relies on reputation, OCF would be better served by providing family services to selected current donors, assessing the results, and adapting our approach as needed.

As of summer 2016, our portfolio includes 45 DAFs that we believe are logical candidates for a fee-for-service approach. Rather than diverting valuable resources to market research, OCF should invest in building our relationships, reputation and brand so that we are ideally positioned to serve the demonstrable unmet need for expanded family philanthropy services in Oregon.

## OPPORTUNITIES

Initially, we see the following major opportunities:

1. Funds under \$100,000 receive customer service and support from the Donor Relations team (associate and DRO). Associates will respond to transactional inquiries.
2. Identify transactional funds that do not require deeper team services, focusing on the Metropolitan Portland region first.
3. Promote MyOCF as the best resource for donors who wish to make grants or to check their fund's status.
4. Increase grantmaking through MyOCF.

Further opportunities include:

1. Develop a fee-for-service menu that offers fixed options and also creates a space for donors who are interested in working more creatively with OCF.
2. Invest in staff training for family services at regional offices, in order to develop staff as content experts in multigenerational giving.
3. Use 2016 to explore a fee-for-service model with **identified families**, while also pursuing deeper family services with others.
4. Use 2016 to pilot new ways to serve donors and identify recommendations for 2017.

## RECOMMENDATIONS

- Provide a tiered team support approach for donors. Instead of having an assigned DRO serve as the only point of contact, the entire Donor Relations team will assist donors with common inquiries—such as fund balances, MyOCF login information, and submitting grant advice—leaving DROs free to handle complex inquiries and multigenerational giving topics.
- Analyze budget and overhead costs for donor relations work, including travel and training costs, and costs for temporary staff.
- Engage DROs in time tracking. Compiling DRO time tracking for one quarter would help us understand which activities take up the most time, and it would also identify high-touch, high-cost donors and funds.
- Consider time tracking for all DR staff to monitor time spent on general activities as well as fund-specific activities. This would also allow support staff to track resources, so that fees can be monitored and revisions made as needed.
- Limit initial offerings strategically to existing donors. Many OCF families are already interested in this service. Economically and logistically, it makes sense to meet their needs before targeting outside donors.
- Include families with funds of \$2 million or more in the Family Giving Center. This includes families with multiple funds totaling \$2 million or more.
- Make fee-for-service support available to families with OCF funds under \$2 million.
- Make fee-for-service support available to families whose philanthropy occurs outside OCF.
- Revisit our two-generation successor advisor policy.
- Work with a contractor to develop a marketing plan and productize the Family Giving Center's services. This will entail creating online and printed marketing materials, as well as outreach and presentations to professional advisors.
- Host a Metropolitan Portland event in 2017 to introduce donors to the Family Giving Center.
- Continue to develop our strong partnership with Grantmakers of Oregon & Southwest Washington to educate GOSW members with family foundations through the Family Foundation Learning Exchange.

# ANALYSIS OF THE DAF PROGRAM

As part of the planning process, we analyzed 2014 data to identify revenue and expense associated with managing DAFs. We considered fund size and activity, administrative fees, and donor services.

## KEY FINDINGS

Our analysis of OCF's 2014 advised fund activity offers a new perspective on our alignment of services and administrative fees.

- OCF's average staff cost to perform a single due diligence inquiry totaled approximately \$100 (associate only). The staff cost to review, print and mail one grant was \$55 (DRO and associate).
- The approximate cost of administering special grantmaking programs, such as a Request for Proposal process, was \$11,000.
- For funds under \$50,000, the estimated net income per fund is (\$604). In other words, the fees generated **do not cover** OCF's administrative costs.
- More than half of advised funds are \$250,000 or less.
- OCF has 41 advised funds in the \$2 million to \$6

million range, which makes up about 5 percent of the DAF portfolio. These funds generated 34 percent of OCF's fee revenue.

- Funds in the \$50,000 to \$500,000 range accounted for 41 percent of administrative expenses. These 439 funds comprise 58 percent of the DAF portfolio.

Our findings have already informed the Donor Relations department's effort to rethink our current delivery of donor services while ensuring that we continue to provide prompt and responsive service to all donors. Recent changes include:

- Increasing the minimum grant amount to \$500
- Streamlining the due diligence process for grants to new organizations, by looking at the amount of a grant to assess how much information we collect

The data have also enabled us to identify a size threshold for funds that will receive complimentary family services as opposed to fee-based services. This will ensure both that our specialized services are supported by funds of an adequate size and that we can negotiate effectively with donors who fall under a fee-for-service model.

## Donor Advised Funds: 2014 Activity

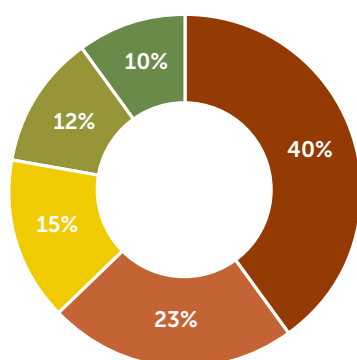
Fund asset size	Total value of funds	Number of funds	New funds (2014)	Number of grants	Due diligence	Cost per fund	Income per fund	Net per fund
\$0-49K	\$ 4,109,209	167	22	538	49	\$ 925	\$ 321	\$ (604)
\$50K-249K	\$ 40,389,816	348	14	1,304	105	\$ 1,010	\$ 1,078	\$ 69
\$250K-499K	\$ 31,690,087	91	6	550	26	\$ 1,186	\$ 3,053	\$ 1,868
\$500K-999K	\$ 47,599,745	64	5	722	62	\$ 1,859	\$ 7,491	\$ 5,632
\$1M-1.999M	\$ 54,827,334	41	1	445	27	\$ 4,089	\$ 12,373	\$ 8,284
\$2M-5.999M	\$ 148,413,705	41	3	542	23	\$ 4,229	\$ 31,591	\$ 27,362
\$6M-19.999M	\$ 93,378,077	9	—	109	1	\$ 4,212	\$ 73,210	\$ 68,998
\$20M	\$ 25,288,459	1	—	2	—	\$ 11,883	\$150,606	\$138,723
<b>TOTAL</b>	<b>\$445,696,431</b>	<b>762</b>	<b>51</b>	<b>4,212</b>	<b>293</b>			

## ASSUMPTIONS

Our analysis of OCF's 2014 advised fund activity considers fund costs, income per fund, and estimated Donor Relations staff time. Only advised fund costs were considered in our analysis. We used the following assumptions to analyze fund activity:

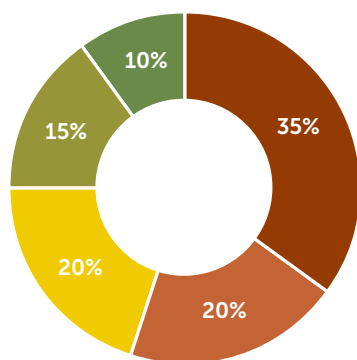
- **Fund asset size.** Funds are categorized by OCF's current fee schedule, with the original fee schedule category of \$0 to \$2 million broken down into more detailed categories:
  - \$0 to \$49,999
  - \$50,000 to \$249,999
  - \$250,000 to \$499,999
  - \$500,000 to \$999,999
  - \$1 million to \$2 million
- **Analysis period.** Advised fund activity was analyzed for the calendar year 2014.
- **Associate cost allocation.** Associate staff's self-reported figures on time use for the first quarter of 2015 were used to allocate 2014 wages and benefits across donor advised funds. Please see the *Associate Cost Allocation* chart below for a full breakdown of these costs.
- **Donor relations officers and vice president cost allocation.** In the absence of a self-reported time summary, 2014 wages and benefits for DROs and for Laura Winter were allocated using the assumptions shown in the *DROs & Vice President Cost Allocation* chart below.
- **Income per fund.** This refers to OCF administrative fees assessed in 2014.

### Associate Cost Allocation — 2014



- Meetings, MyOCF maintenance, and general administration, allocated evenly across total DAFs
- Grant entry and payment, allocated to funds based on the number of grants paid in 2014
- Due diligence inquiries, allocated to funds based on due diligence activity in 2014
- New fund activity/packets/RFP, allocated across the total number of funds, with funds established in 2014 requiring 30 percent more work than ongoing funds
- Report work, allocated to special or RFP funds

### DROs & Vice President Cost Allocation — 2014



- General fund activity, allocated across the total number of funds, with funds established in 2014 requiring 30 percent more work than ongoing funds
- Grant-related activity (e.g., communicating with donors and reviewing grant reports), allocated to funds based on the number of grants paid in 2014
- High-value funds (i.e., balance above \$1 million), allocated evenly across 92 funds
- Special or RFP funds
- General administration, allocated evenly across total DAFs

# BUSINESS CONCEPT AND OPPORTUNITY

OCF's Advised Fund Program has played a lead role in donor stewardship and engagement. Now, we see a major opportunity to go deeper with families who have asked us to help them navigate multigenerational giving.

Since the Donor Relations department was created, DROs have been the focus of donor relationship management for all DAFs. We are now moving toward a team support approach, engaging associates to assist donors with simple transactional requests and questions. This will free up DROs to focus on family work.

We are already doing this work, but without having the necessary standards and guidelines in place. The Family Giving Center will impose form and structure on our ongoing efforts to help families understand the challenges and rewards of multigenerational giving.

The Family Giving Center will serve donors who have funds of a certain size, while offering a fee-based menu of services for other families. It will also establish a structure for providing fee-for-service support to families whose philanthropic work occurs outside OCF.

## INITIAL CONCEPT

- Increase strategic focus on the long-term needs and goals of key OCF families.
- Limit initial offerings strategically to existing donors.
- Facilitate conversations to identify how families want to work together on philanthropy.
- Develop custom tools for multigenerational giving.

In the 2016 testing phase, we are providing services to a few families, using DROs who currently have full portfolios of funds that need service. Given more staffing, especially at the administrative level, we will have an opportunity to offer deeper services, such as:

- In-depth reporting and analysis showing the full impact of family giving
- Funding circles and learning groups that pool funding and work together on causes

- Targeted programming for younger generations, such as grantmaking tutorials, a next-gen giving circle, or social engagement and networking events
- Working with families who give outside OCF
- Working with the Development team to conduct presentations with professional advisors at larger firms. Staff can identify professional advisors with deep ties to OCF, as well as families who are candidates for our services, and demonstrate tools for facilitating family giving conversations. OCF's Philanthropy Forums also present an opportunity to introduce Center services to professional advisors.

## MARKET ASSESSMENT

We know that a major gap exists in the market for family giving services in Oregon. However, based on our initial research, efforts to quantify this market are unlikely to justify the time and expense they would entail.

Joyce White, who has more than 19 years of experience as the executive director of Grantmakers of Oregon & Southwest Washington, believes strongly that there is currently no reliable way to quantify this market, and suggests that attempting to do so would squander OCF's resources without producing useful information.

Because work of this kind relies heavily on reputation, OCF would most likely be better served by providing services to selected current donors, assessing the results, and adapting our approach as needed.

As a general indication of the lack of family giving services in our area, Joyce White notes that family foundation members will often call her looking for advice on consultants. To date, she has been sending them out of state because she lacks confidence in local consultants.

This lack of competition is a major but temporary advantage for OCF, which justifies acting sooner rather than later. As of summer 2016, our portfolio includes 45 DAFs that we believe are logical candidates for a fee-for-service approach.



This will also open the door to new service markets:

- Targeting families who give outside OCF
- Targeting family business offices
- Appealing to younger donors who may not want to create a private foundation
- Working with financial planners and wealth managers, who have not always been comfortable referring their clients to OCF due to the loss of fees

In conclusion: Rather than diverting valuable resources to market research, OCF should invest in building our relationships, reputation and brand so that we are ideally positioned to serve the demonstrable unmet need for expanded family philanthropy services in Oregon.

### **Staff expertise in family dynamics**

Over the last 20 years, OCF has been partnering with other community foundations to develop tools for families who are interested in multigenerational giving. In 2013, OCF began working with 21/64 in order to refine and deepen our family giving work. Training includes:

- Identifying common values in order to reach family agreement around philanthropic goals
- Navigating complex conversations about wealth
- Preparing for and facilitating meetings
- Practicing communication tools, such as active listening and asking open-ended questions
- Understanding family systems and dynamics

Due to this unrivaled staff expertise, OCF is much better positioned than our competitors to offer family services.

### **Why build a Family Giving Center?**

In the short term:

- It will deepen our connection with donors.
- It will generate additional revenue and new funds.
- OCF staff and offices will develop a common language to talk about this work.
- It will clearly differentiate OCF from commercial charitable funds.

In the long term:

- It will provide an additional revenue source in years when the market and fees are down.

- It will enhance OCF's appeal to outside partners.
- It may be a sales tool for Development.
- There is a potential to offer fee-for-service support to private foundations.

### **Why build it now?**

- OCF families are already asking us for this service.
- Sophisticated donors are currently seeking a deeper involvement in their giving, as well as more information about its impact.
- A significant transfer of wealth is underway. National data predict that \$6 trillion will change hands over the next 30 years.
- Our competitor research shows that the region's focus on multigenerational family work is limited, and only a few philanthropic consultants have undergone 21/64 training in Oregon. OCF is well positioned to fulfill these unmet needs.
- There is increasing competition from nonprofits seeking major gifts. In Oregon, we've seen a major gift push from OHSU's Knight Cancer Challenge. Also, University of Oregon, Oregon State University and Portland State University have embarked on large campaigns targeting the same prospects as OCF.
- OCF has a robust research department, as well as unmatched local expertise. Through our incomparable knowledge and skills, we are better positioned than most of our competitors to help donors develop informed, relevant and effective giving strategies.

### **Why target key families in the short term?**

- Current donors are already asking for this service. Economically and logistically, it makes sense to meet their needs before targeting outside donors.
- This work requires trust. Our strong, established relationships give us a significant opportunity to move forward and build our skills.
- This work is intimate and time-intensive. It takes effort and expertise to understand each family member's views and help them to reach a consensus.
- We currently have limited staff capacity and a need for ongoing training.
- We will gather information that can guide expansion of the Center's offerings.

# NEXT STEPS: RECOMMENDATIONS

## TIERED TEAM SUPPORT

Today, the Donor Relations team is being stretched thin by the creation of new advised funds and family requests for specialized services. Instead of having the assigned DRO serve as the only point of contact, the entire Donor Relations team should assist donors with common inquiries such as fund balances, MyOCF login information, and submitting grant advice. This will leave DROs free to handle more complex inquiries. DROs will also address multigenerational giving topics, including family governance and next-gen leadership development.

## PHASED ROLLOUT

Many OCF families are already interested in this service. Economically and logistically, it makes sense to limit initial offerings strategically to our existing donors before targeting outside donors. Building on this experience will prepare OCF to undertake further phases of the rollout:

- Include families with funds of \$2 million or more in the Family Giving Center. This includes families with multiple funds totaling \$2 million or more.
- Make fee-for-service support available to families with funds under \$2 million.
- Make fee-for-service support available to families whose philanthropy occurs outside OCF.
- Revisit our two-generation successor advisor policy.

## MARKETING DEVELOPMENT

OCF should work with a contractor to develop a marketing plan that will “productize” the Family Giving Center’s services. This would include:

1. Online and printed material outlining our services
2. Outreach to professional advisors, including:
  - Print materials detailing client benefits
  - One-on-one meetings and presentations
  - Presentations at OCF Philanthropy Forums
3. A 2017 event in Portland to introduce the Center. This event should include a packet for donors, as well as a notable speaker (e.g., Coventry Edwards-Pitt, author of *Raised Healthy, Wealthy & Wise*).

4. Continued development of our partnership with Grantmakers of Oregon & Southwest Washington to educate GOSW members with family foundations through the Family Foundation Learning Exchange.

## BUDGET AND OVERHEAD ANALYSIS

Non-personnel expenses for donor relations work, such as travel and training, were not included in this analysis. Estimated personnel costs do not include costs for temporary staff. They also do not include overhead and other staff support, such as the role of Finance and Fund Services staff in processing donations, reviewing grant workflows, allocating fees, and generating statements.

### Engage DROs in time tracking

Associates’ time tracking for Quarter 1 of 2015 generated data that were very useful for analyzing the Donor Relations cost centers. We were able to allocate associate time much more precisely than DRO time.

Currently, OCF’s database does not include a time tracking system for working with donors. Staff are therefore exploring alternative tools for time tracking, recognizing that we will need a system to identify specific activities. Compiling DRO time tracking for one quarter would help us understand which activities take up the most time, and it would also identify high-touch, high-cost donors and funds.

### Consider time tracking for all DR staff

Our current analysis is approximate. We have allocated aggregate figures using general assumptions that are prone to inaccuracy, simply because we don’t have precise enough data to perform a better analysis.

One solution would be to implement time tracking for all Donor Relations staff. This would allow staff to monitor time spent on general activities such as preparing semi-annual packets, as well as fund-specific activities.

This level of time tracking would also allow staff who are engaged in supporting family philanthropy to track resources, so that fees can be monitored and revisions made as needed.

## APPENDIX A

# PROPOSED SERVICE LEVELS FOR DONOR ADVISED FUNDS

UP TO \$100,000	\$100,000+ — \$2 MILLION	ABOVE \$2 MILLION
Standard Services	Enhanced Services	Additional Services
<ul style="list-style-type: none"> <li>• Semiannual communications</li> <li>• Fee-for-service menu available</li> </ul>	<ul style="list-style-type: none"> <li>• Semiannual communications</li> <li>• Fee-for-service menu available</li> </ul>	<ul style="list-style-type: none"> <li>• Communication as needed</li> <li>• Eligible for complimentary Family Giving Center services</li> </ul>
<ul style="list-style-type: none"> <li>• Support from Donor Relations team (a DRO oversees the relationship; associates respond to transactional inquiries)</li> </ul> <p><i>Our Donor Relations team is available to answer any questions about your fund.</i></p>	<ul style="list-style-type: none"> <li>• Support from Donor Relations team (a DRO stewards the relationship, engaging regularly with the donor; associates respond to inquiries)</li> </ul> <p><i>You will be supported by a donor relations officer. Our Donor Relations team is also available to answer any questions about your fund.</i></p>	<ul style="list-style-type: none"> <li>• Support from Donor Relations team (a DRO stewards the relationship, engaging regularly with the donor; associates respond to inquiries)</li> </ul> <p><i>You will be supported by a donor relations officer. Our Donor Relations team is also available to answer any questions about your fund.</i></p>
<ul style="list-style-type: none"> <li>• In-person welcome meeting to understand donor interests and answer questions about OCF</li> <li>• The Donor Relations team is available to answer questions, troubleshoot issues, etc.</li> <li>• Annual outreach to fund advisors</li> </ul> <p><i>Once your OCF fund becomes active, a Donor Relations team member will contact you to schedule a welcome meeting. At this meeting, you will learn more about how your fund operates and the Donor Relations team will learn more about your funding interests.</i></p>	<ul style="list-style-type: none"> <li>• In-person welcome meeting to understand donor interests and answer questions about OCF</li> <li>• Ongoing meetings as requested</li> </ul> <p><i>Once your OCF fund becomes active, a Donor Relations team member will contact you to schedule a welcome meeting. At this meeting, you will learn more about how your fund operates and the Donor Relations team will learn more about your funding interests.</i></p>	<p><b>Family Giving Center Services:</b></p> <ul style="list-style-type: none"> <li>• Personalized work to identify and articulate shared family values, philanthropic goals, and grantmaking approaches</li> <li>• Strategies and tools to foster multigenerational giving</li> <li>• Facilitated family meetings</li> </ul> <p><i>Our donor relations officers are trained in family dynamics and are experts in multigenerational giving. We can help you bring your family together through giving to enrich the communities you care about. We offer advice and services on such topics as family governance, generational transitions, next-generation leadership development, strategic grantmaking, and measuring impact.</i></p>

UP TO \$100,000	\$100,000+ — \$2 MILLION	ABOVE \$2 MILLION
Standard Services	Enhanced Services	Additional Services
<ul style="list-style-type: none"> <li>Project suggestions based on donor interests</li> </ul> <p><i>Each spring and fall, our Donor Relations team will share projects in your areas of interest.</i></p> <p><i>You will receive an email with a link to MyOCF, where you can check your fund balance and grantmaking budget, review projects for potential funding, search for projects, and recommend grants.</i></p>	<ul style="list-style-type: none"> <li>Project suggestions based on donor interests</li> </ul> <p><i>Each spring and fall, our Donor Relations team will share projects in your areas of interest.</i></p> <p><i>You will receive an email with a link to MyOCF, where you can check your fund balance and grantmaking budget, review projects for potential funding, search for projects, and recommend grants.</i></p>	<ul style="list-style-type: none"> <li>Customized project suggestions based on donor interests</li> <li>In-depth, issue-based research (negotiated for a fee)</li> </ul> <p><i>Each spring and fall, your donor relations officer will provide a customized list of projects. You will receive an update on your fund balance and grantmaking budget. You can also use MyOCF to search for projects and recommend grants.</i></p>
<ul style="list-style-type: none"> <li>Invitation to educational events and programs</li> </ul> <p><i>Throughout the year, OCF hosts events that bring donors together to learn about key issues facing our state.</i></p>	<ul style="list-style-type: none"> <li>Invitation to group site visits, educational events, and donor education programs</li> </ul> <p><i>Throughout the year, OCF organizes group visits to organizations and hosts events that bring donors together to learn about key issues facing our state.</i></p>	<ul style="list-style-type: none"> <li>Private site visits</li> </ul> <p><i>Your donor relations officer can arrange visits to specific organizations so you can learn more about the work they do in our communities. You will also be invited to OCF-hosted events throughout the year, which bring donors together to learn about key issues facing our state.</i></p>
<p>Grantmaking services:</p> <ul style="list-style-type: none"> <li>Weekly approval of grants \$50,000 and under, and monthly approval for all others</li> <li>Vetting organizations to ensure federal compliance</li> <li>Fund access through MyOCF</li> </ul>	<p>Grantmaking services:</p> <ul style="list-style-type: none"> <li>Weekly approval of grants of \$50,000 and under, and monthly approval for all others</li> <li>Grantmaking guidance, including vetting organizations to ensure federal compliance</li> <li>Fund access through MyOCF</li> </ul>	<p>Grantmaking services:</p> <ul style="list-style-type: none"> <li>Weekly approval of grants \$50,000 and under, and monthly approval for all others</li> <li>Grantmaking guidance, including vetting organizations to ensure federal compliance</li> <li>Fund access through MyOCF</li> <li>Grant program specific to a fund (negotiated based on fund size; possible additional fee)</li> </ul>





THE MISSION OF THE OREGON COMMUNITY FOUNDATION IS TO IMPROVE  
LIVES FOR ALL OREGONIANS THROUGH THE POWER OF PHILANTHROPY