

FAMILY SURVEY

in Preparation for your Meeting

with The Oregon Community Foundation

This survey is designed to provide your family a starting point for discussion about the purpose of an OCF family fund: its values, interests and operating strategies. Each family member is asked to write brief answers to the questions and return them to OCF. Your answers need not be long. Thank you.

1. Why do you think it is important for your family to establish a fund at OCF?
2. There are many different, meaningful ways to support worthwhile community activities. On each line below, circle the description that is closest to the way you would like to see the fund operate.
 - support small grass roots organizations-----support larger, proven institutions
 - make a number of smaller grants-----one or two large grants each year
 - support the same organization for a few years-----make one-time grants to many groups
 - help with special projects-----support the ongoing costs of doing good work
 - focus on the local community-----focus on the best in the state
 - make grants for lasting items like buildings, equipment-----support staff and project costs

Other Ideas?

1. What is important to you about the way the fund and the family advisory committee for the fund are run?

2. Below is a list of values that other families have identified. Circle three values that you believe are *most strongly shared* by you and family members. Feel free to add other values to the list.

Compassion for the Less Fortunate

Freedom

Tolerance

Reverence/Religion

Equal Opportunity for Success

Fairness

Honesty

Entrepreneurial Spirit

Living Simply

Accountability

Innovation

Risk-Taking

Respect for Human Dignity

Love

Self-determination

Loyalty

Leadership

Living Productively

Other:

5. What is your most positive vision about what your family will achieve with this fund in the next five years?

We recognize that these questions deal with issues that many families do not discuss in the course of daily business. The survey is more important for getting a family thinking about and discussing issues than for determining what the ultimate purpose of a fund will be.