

OCF Giving Strategies

PHILANTHROPIC SUPPORT SERVICES FOR PRIVATE AND FAMILY FOUNDATIONS, INDIVIDUAL FAMILIES AND COMMERCIAL DONOR ADVISED FUND HOLDERS

Did you know that OCF can provide philanthropic support services to your private or family foundation and to you if you have a commercial donor advised fund? You can reap the benefits of OCF's enhanced services and deep knowledge about philanthropy in Oregon even if you don't have an OCF fund. OCF can provide support for your giving using a fee-for-service model.

OCF Giving Strategies include a suite of enhanced services supporting generous Oregonians like you in reaching your philanthropic goals. We work with individuals, their families, and their foundations to have meaningful conversations, clarify their mission and values, articulate what they hope to achieve and find the path to achieving them.

OCF is uniquely positioned to offer the following benefits:

- Expert Guidance
- Deep Engagement
- Amplified Impact

Below are examples of ways OCF has helped individuals and families with their philanthropic legacy building and strategic giving.

HOW IT WORKS

Consultation: We begin with an initial exploratory meeting to discuss individual and family goals and address common questions.

Initial Proposal: OCF presents a proposal outlining the goals articulated in the consultation, a recommended pathway toward progress, and fees. Proposals are tailored to fit each individual's or family's unique needs and goals.

Collaborative Action: Donors or representatives collaborate with OCF to accomplish established goals based on the plan in the proposal.

Meaningful Impact: With OCF's help, families and individuals build on their successes, supporting the causes they care about in a way that is meaningful and impactful.

WHAT WE CAN DO FOR YOU

We engage with individuals and families to learn about their needs and goals and then we build a plan to support their work. Examples of how we support families and family foundations include:

- **Building a mission and vision statement:** helping family members find shared values, including identifying the values they want to work from together in their giving.
- **Identifying focus areas for philanthropic impact:** working from a social science research-based approach, learning about needs, opportunities and gaps around topic areas and/or geographical regions to help identify opportunities for philanthropic investment.
- **Building grantmaking programs:** working with families to identify needs, build relationships with organizations and learn about the impact areas the family wants to invest in.
- **Facilitating family meetings:** from simple meetings to a multiple day strategic planning retreat, our trained facilitators work with families to co-create and design gatherings that fit with the family's needs and help them achieve their goals.

PRICING

This work is highly personalized and tailored to each family's unique needs and circumstances. For an idea of what services may cost, here are some typical prices for our more common services. Prices may vary, so please contact us for a quote.

- 3-hour facilitated meeting for up to 10 participants, \$3,000.
This includes most facilitated discussions detailed above.
- Facilitated one-day retreat for up to 10 participants, \$10,000 - \$12,000.
- Shared mission and vision development for up to six people, \$8,000 - \$12,000.
- Special projects and research, pricing will be based on an estimate of staff hours.
Hourly rates range from \$200 - \$400, depending on experience and expertise.

OCF MISSION AND BACKGROUND

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

OCF is one of the largest community foundations in the country, with more than \$2 billion in assets held in more than 2,000 charitable funds. OCF works with individuals, families, businesses and organizations to create charitable funds that support the critical work that nonprofits do across Oregon and beyond. In 2021, OCF awarded more than \$330 million in grants and scholarships throughout the state.

CONTACT DETAILS

JENNIFER CURRY
Director of Giving Strategies
jcurry@oregoncf.org
(503) 227-6846

REBECCA BIBLEHEIMER
Senior Complex Gifts Officer
rbibleheimer@oregoncf.org
(503) 944-2124