



Endowment Partners Program

Are You Ready for Endowment?

The following indicators are critical to a successful endowment program:

LEADERSHIP

Strong and experienced management, successful leadership transition, and an active and diverse board are leading indicators for success.

FINANCIAL RESPONSIBILITY

Financial stability, fiscal accountability, a broad base of support, adequate operating reserves and a sound spending policy can maximize the benefits of your endowment program.

FUND DEVELOPMENT CAPACITY

Successful endowment funds require sufficient staff and volunteers as well as a strong commitment to long-term fundraising strategies.

REQUIREMENTS

To become an endowment partner, your organization must:

- Complete an application.
- Have 501(c)(3) public charity status.
- Be registered with the Oregon Secretary of State and Oregon Department of Justice.
- Have business operations (preferably headquarters) in Oregon.
- Have a substantial mission of service to Oregon.
- Create a permanent agency endowment fund at OCF with a minimum initial transfer of \$25,000.

A philanthropic advisor is ready to assist you. Please contact your local OCF office or email us at giftplanning@oregoncf.org.

Why Place Your Endowment at OCF?

BENEFIT FROM PROFESSIONALLY MANAGED INVESTMENTS

OCF combines assets from permanent charitable funds for investment. Each fund benefits from the strength of a large pooled portfolio. The result is high-quality, diversified investment management with reasonable costs.

SAVE TIME AND RESOURCES

Every dollar earned from endowment investment is one less you need to raise. Focus on your core mission, and spend less time on administering and managing your endowment.

RECEIVE GUIDANCE

Enjoy the benefit of our experience, including advice on complex gifts such as real estate and stock.

BE PART OF OCF'S DEFERRED GIVING PROGRAM

Our philanthropic advisors can work with your donors and their attorneys to create deferred gifts such as bequests, beneficiary designations, charitable remainder trusts and charitable gift annuities that will benefit your endowment fund.

INVESTMENTS

A well-diversified portfolio is fundamental to OCF's investment strategy of maximizing returns while reducing risk and volatility.

PAYOUT POLICY

To maintain each fund's purchasing power, the OCF board annually determines a percentage payout rate. The current rate is between 4% and 5%, based on a 13-quarter trailing average of fund market values.

FUND AGREEMENT AND DISCLOSURE STATEMENT

OCF will prepare these documents for review and approval by your board.

PRESENTATIONS

An OCF philanthropic advisor is available to meet with your staff and board to provide more details about partner services, including helping your donors create deferred gifts to support your fund.

Create an Endowment

- ✓ **Help ensure your long-term viability.**
- ✓ **Diversify revenue sources.**
- ✓ **Provide steady income to offset operations and new programs.**
- ✓ **Attract donors to support your organization's work.**



ABOVE: NORTHWEST YOUTH CORPS, SOUTHERN WILLAMETTE VALLEY.

Our Endowment Partners Program provides full stewardship of your endowment, relieving you and your board of day-to-day administration and oversight of investment management.

“OCF was an invaluable resource when SMART founders established an endowment more than 20 years ago. OCF’s Endowment Partners Program staff continues to work with us to engage Oregonians who want to inspire future generations of confident readers.”

CHRIS OTIS
EXECUTIVE DIRECTOR, SMART



“OCF is an essential partner for us. Having our endowments at OCF gives confidence to our donors that their investments with us will be maximized for the community we all serve. And the support they provide to our staff is invaluable.”

ANDREW PROCTOR
EXECUTIVE DIRECTOR, LITERARY ARTS



LEGACY. LEADERSHIP. IMPACT.

**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 support the community causes they care about most.

CREATE YOUR LEGACY TODAY

CALL

Your local OCF office

VISIT

oregoncf.org

EMAIL

giftplanning@oregoncf.org

OREGONCF.ORG

BEND

(541) 382-1170

EUGENE

(541) 431-7099

MEDFORD

(541) 773-8987

PORTLAND

(503) 227-6846

SALEM

(503) 779-1927