





2016-2021

OREGON CULTURAL TRUST
STRATEGIC PLAN



ACTIVE IS AN UNDER STATEMENT.
OREGONIANS ARE ERUPTING WITH IMAGINATION.
THIS LAND SEEMS TO SPAWN FOLKS WITH A
CREATIVE ITCH THAT NEEDS TO BE SCRATCHED.
A NOVEL TO WRITE. A BEAT TO LAY DOWN.
A SHAKESPEARE TO STAGE.
A SPIRIT TO DANCE TO. A WAGNER TO MOUNT.
A MOSH-PIT TO ROUSE.
A POSOLE TO SIMMER. A GENRE TO SUBVERT.
A CRAZY QUILT TO SEW OF YOU AND YOU AND ALL OF US TOGETHER.
THE GHOST OF KESEY HOVERS, TWEAKING US TO BE DIFFERENT,
WILDER, CONTRARY, BETTER.
TO THAT MYSTERIOUS MUSE, BE TRUE.
OUR JOB? WHEREVER YOU ARE, WHATEVER YOU'RE HATCHING, GO FOR IT.
AFTER ALL, YOU'VE MADE US WHAT WE ARE.

98,000 SQUARE MILES OF YES.

VISION: We envision an Oregon that champions and invests in creative expression and cultural exchange, driving innovation and opportunity for all.

MISSION: To lead Oregon in cultivating, growing and valuing culture as an integral part of communities. We do this by inspiring Oregonians to invest in a permanent fund that provides annual grants to cultural organizations.

Cover photos:

Top left: Stumptown Stage's 2014 production of Fats Waller's "Ain't Misbehavin'." Photo by Paul S. Fardig.

Top right: Artists sketch during the Ladd Marsh Bird Festival in La Grande, courtesy of a partnership with Arts Central East. Photo by Mika Morton.

Bottom left: Chief Don Ivey of the Coquille Indian Tribe demonstrates a salmon pit during the 2015 Oregon Heritage Conference in Coos Bay.

Bottom right: Helvetia Cultural Festival performers at the Washington Coalition Awards Ceremony in March of 2015.

THE OREGON CULTURAL TRUST IS OREGON'S UNIQUE FUNDING ENGINE FOR CULTURE.

Oregonians fund the Oregon Cultural Trust. We, in turn, fund the artists, the poets, the preservationists and the dreamers who make Oregon, Oregon. Every year we disperse funds via our 1,450+ cultural nonprofits, 45 county and tribal coalitions and five statewide partners.

Here's how it works: 1) Donate to your favorite cultural organization(s). 2) If they're one of our 1,450+ cultural nonprofits, donate that same amount to the Cultural Trust. 3) Take that same amount off your state taxes.

That's right. Your donation to the Trust comes back to you as a tax credit. Culture across our great state thrives, and financially you don't miss a beat. Win-win.

No other state in the union has this incredible benefit. Lucky Oregonians!

Business Oregon works to create, retain, expand and attract businesses that provide sustainable, living wage jobs for Oregonians through public private partnerships, leveraged funding and support of economic opportunities for Oregon companies and entrepreneurs.

Business Oregon houses the Oregon Cultural Trust and the Oregon Arts Commission in recognition of the expanding role culture plays in the broader social, economic and educational arenas of Oregon communities.

business
oregon



PLANNING METHODOLOGY AND PROCESS



Fireworks culminate the Oregon Symphony's performance of Tchaikovsky's 1812 Overture at the orchestra's annual Waterfront concert in Portland.

THE OREGON CULTURAL TRUST BEGAN THE PLANNING PROCESS IN OCTOBER OF 2014, COMMITTED TO INCLUDING INPUT FROM THE PUBLIC AND AS MANY STAKEHOLDERS AS POSSIBLE.

The staff and Trust Board conducted 14 town meetings across Oregon. More than 500 people attended including elected officials, community leaders, staff from arts and cultural organizations, educators and members of the general public. We used a participatory process that gathered information in an efficient way by having attendees focus on the following question, "How can we (Cultural Trust) find new ways to expand the resources available to cultural institutions in Oregon?" Participants formed small working groups to develop responses to the question before the topics were organized and discussed by the full group. Staff organized the topics from all of the town meetings and 13 major themes emerged. In addition, Trust staff conducted seven regional gatherings for county and tribal cultural coalitions, with over 160 coalition members advancing the thinking and proposing strategies to increase engagement at the county and tribal level.

1

The Trust Board and staff had planning retreats to review the town meeting documentation and began to develop the framework of the plan including four major goal areas. A planning sub-committee was formed that was comprised of board members and staff. They began their work by refining the Trust's mission and vision statements.

2

The sub-committee met several times to further develop the plan. Staff also worked with Richard Linzer, a planning and evaluation consultant. Mr. Linzer has developed numerous plans with funders and cultural organizations and state arts agencies. The Trust Board approved the plan at a meeting on Nov. 12, 2015.

3

The ongoing evaluation of our progress toward meeting the plan's goals is integral to its success. Annually, the staff and Trust Board will review and measure progress, adjusting as necessary to respond to external factors. Regular monitoring will take place at board meetings during the year.

WE ARE VERY EXCITED TO PRESENT THE OREGON CULTURAL TRUST STRATEGIC PLAN THAT WILL GUIDE US FOR THE NEXT FIVE YEARS.

The process of developing this plan started a number of months ago and included an incredible amount of public input, which this plan is built upon. The Trust is unique – no other state offers a citizen-driven investment in culture. Oregonians' love of culture is evident by the support the Trust receives, enabling us to respond to the needs of our dynamic statewide cultural network.

The Cultural Trust was founded by the Oregon Legislature in 2001 and has been growing steadily every year thanks to your support. In that first year we received 2,800 donations for a total of \$1.36 million. We have experienced record fundraising in the past two years and look forward to continuing our growth for years to come. Last year (2015) we received more than 9,200 donations for a total of \$4.56 million.

We allocate more than 60 percent of the donations we receive to support cultural organizations, County and Tribal Coalitions, and our five Cultural Partners. Hundreds of awards are made each year to support a diversity of projects all across the state, nurturing our passion for culture.

While some of the original goals set for the Trust have changed due to current realities, this plan builds on successes and continues to grow the Trust by responding to our changing environment. Recent legislation to modernize the Trust has enabled us to build a plan for advancing our national reputation as a state that values culture as a core part of everyday life.

As you review this plan you will see that we are dedicated to growing the Trust for future generations and supporting as many quality cultural projects in as many communities as possible. Maximizing the visibility and reinforcing the vibrancy of culture is a key goal for our future, which will require working diligently with our cultural network and partners.

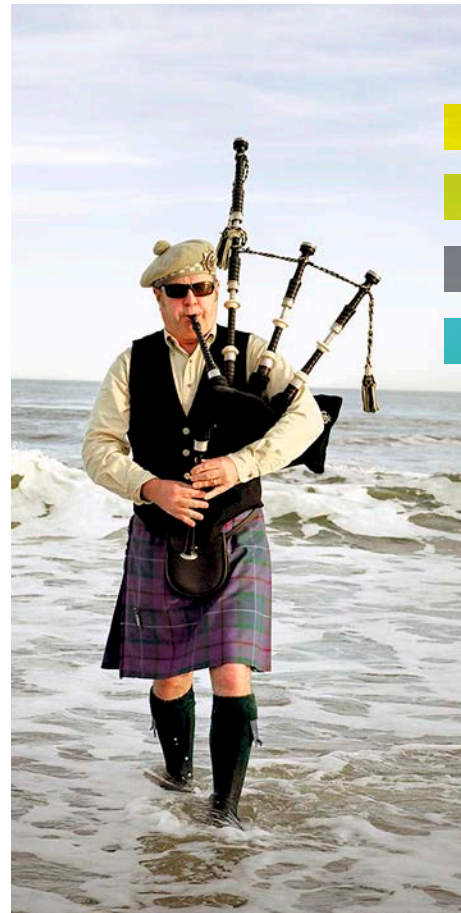
We invite you to continue to participate in the Trust. After all, you made us what we are: 98,000 square miles of YES!



Carole Morse
Board Chair



Brian Rogers
Executive Director



cul·ture

noun

Merriam-Webster defines culture as “the beliefs, customs, arts, etc., of a particular society, group, place or time.”

For the purposes of Cultural Trust funding, culture encompasses the arts, humanities, heritage, history and historic preservation. Under these broad areas there are vast subcategories that include performing arts, literature, folk and traditional arts, music, visual arts, philosophy, architecture, gastronomy (the art and science of good eating), meaningful conversation, entertainment and tourism – all ways that Oregonians celebrate life.



The Astoria Bridge arches over the historic Cannery Pier Hotel near the Columbia River Maritime Museum. Photo by Cory Grove.



Saddle maker Steve McKay of Burns demonstrates leather tooling for University of Oregon Folklore students and Oregon Folklife Network staff. Photo by Douglas Manger.



Historic Waldo Hall on the campus of Oregon State University. Photo courtesy of Restore Oregon by Drew Nasto.

GOAL 1

GROW THE CULTURAL TRUST AND ENSURE ITS FUTURE.

OBJECTIVE A:

Increase donor participation in the cultural tax credit from 12,000 to 25,000 individuals by 2021.

- Conduct donor survey to collect information including donor behavior, values, awareness, motivation and geographic location in year one.
- Develop and implement strategies to increase number of donors by 15 percent each year.
- Develop and implement strategies to increase level of giving by active donors.
- Work directly with board members to increase Class C corporation participation from 25 to 100 by 2021.

OBJECTIVE B:

Implement an advocacy platform that continues to sustain and grow the Cultural Trust.

- Celebrate new legislation and state's recommitment to providing meaningful support to cultural organizations.
- Commit to clear, ongoing, effective communication and partnerships with the Cultural Advocacy Coalition, the Governor and the Oregon Legislature.
- Steward the Cultural Trust as a protected fund for the State of Oregon.
- Prepare to renew the Cultural Trust tax credit authority (2019) in year two.
- Explore with authorizers and document the potential impact of developing programs that will provide venture and working capital in year two.
- Work with Business Oregon to further modernize and implement Cultural Trust growth.
- Increase Cultural Trust board members' engagement in advocacy efforts.



The cast of Storybook Theatre's 2015 production of "Goldilocks and the Three Bears" at the Opal Center in Cottage Grove. Photo by Dani Brown.



A Giving Voice Panel at the 2015 Summer Fishtrap Gathering at Wallowa Lake. Photo courtesy of Fishtrap.



A fourth grade student at Sexton Mountain Elementary in Beaverton participates in the Architecture Foundation of Oregon's Architects in Schools program, serving the Portland metro area, Central Oregon, Salem, Eugene/Springfield and Medford/Ashland. Photo by Sally Painter.



High Desert Chamber Music Spotlight Series featuring "A Violin's Life - Lipinski Stradivarius" on Nov. 20, 2015. Pictured, left to right, are Frank Almond (violin); Rachelle McCabe (piano); and Isabelle Senger (violin). Photo by Stacie Muller, Creative Images of Life.



Oregon Shakespeare Festival's exuberant 2015 production of "Guys and Dolls," directed by Mary Zimmerman. Ensemble. Photo by Jenny Graham, Oregon Shakespeare Festival.

GOAL 2

MAXIMIZE STATEWIDE VISIBILITY FOR THE CULTURAL TRUST'S WORK.

OBJECTIVE A:

Promote the Cultural Trust's investment in a vibrant cultural environment as a defining Oregonian value.

- Utilize new distribution flexibility to increase support to cultural organizations.
- Engage in a rebranding process, including new collateral materials, in year one.
- Develop and launch a new website reflecting the rebranding in year two.
- Cross promote and co-brand with stakeholders.
- Broaden awareness of the Trust beyond cultural audiences.
- Create online annual reports for ongoing reporting beginning in year one.
- Re-envision "Days of Culture" marketing campaign as an inclusive, community-led cultural celebration leading up to the fourth quarter in years one and two.

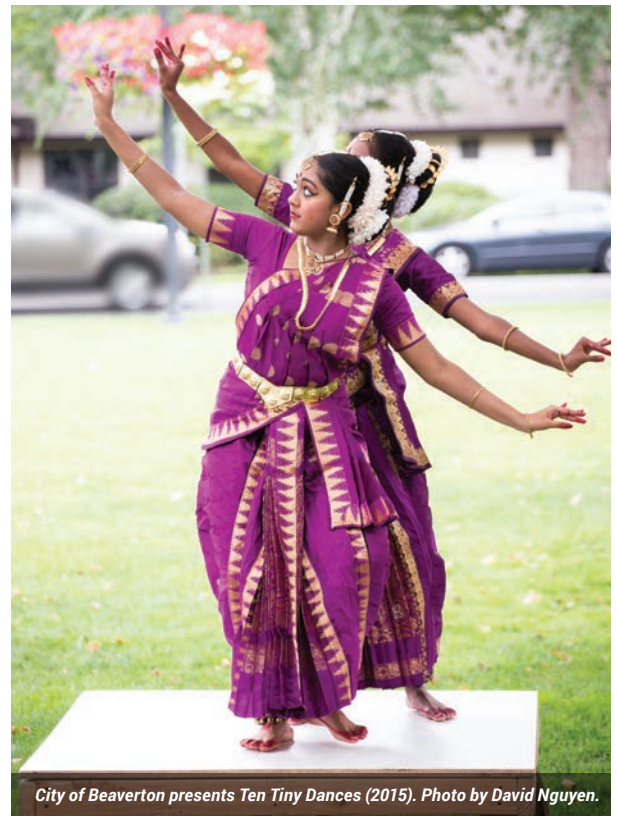
OBJECTIVE B:

Partner with organizations' donors and stakeholders to increase awareness of and participation in the Cultural Trust's tax credit.

- Meet with cultural organizations' marketing and development directors to develop focused communication strategies for their donors and audiences.
- Establish outreach and promotion timeline.
- Continually collect and disseminate organizations' impact stories beginning in year one.



The wind players from Portland's BRAVO Youth Orchestras, 2015. Photo by Kimberly Warner.



City of Beaverton presents Ten Tiny Dances (2015). Photo by David Nguyen.



Nearly 5,000 people of all ages attended Eugene Symphony's seventh annual free summer concert at Cuthbert Amphitheater on July 18, 2015. Photo courtesy of Eugene Symphony.



Taiwanese aborigines visit the Confederated Tribes of Grand Ronde for a cultural exchange in 2015. Photo by Michelle Alaimo/Smoke Signals.



Fifth grade students from Jacksonville Elementary School take part in the Jacksonville Woodlands watershed and water cycle study near Daisy and Jackson creeks. Photo by Larry Smith.

GOAL 3

STRENGTHEN COLLABORATION AND SUPPORT WITHIN THE STATEWIDE CULTURAL NETWORK.

OBJECTIVE A:

Reinforce the Cultural Trust's partnerships.

- Identify and build reciprocal support between County and Tribal Cultural Coalitions, Cultural Partners and organizations beginning in year one.
- Invest in County and Tribal Cultural Coalition resources and communication network to optimize their position as Cultural Trust representatives and partners, beginning in year one.
- Engage statewide cultural network in communicating the value of culture in Oregon.

OBJECTIVE B:

Evaluate and increase the impact of Cultural Trust funding to the cultural network.

- Assess the impact of funding and services of the Cultural Trust in the communities it serves.
- Modify, refine or develop programs and services to respond to assessment.
- Increase investment in cultural funding partnerships by aligning with other funders and donation programs in year one.



Jennifer McConochie, Jennifer Love and Kelsey Olson of the Eugene Concert Choir.
Photo by Jon Christopher Meyers.



Astoria's historic Liberty Theater. Photo by Michael Mathers.



Pendleton Round-Up Let'er Buck Cowboy Boots. Photo by Randall Collis.



A scene from "Voyagers without Trace" by NW Documentary. Photo courtesy of NW Documentary.



Flash, one of the many "art to save the sea" creations from Washed Ashore, Inc., in Bandon. Flash is made entirely from ocean debris. Photo courtesy of Washed Ashore.

GOAL 4

MAXIMIZE EFFICIENCY AND EFFECTIVENESS OF CULTURAL TRUST'S PROCESSES AND PROGRAMS.

OBJECTIVE A:

Respond to community needs and the changing environment in partnership with Business Oregon's 'Grow Our Own' strategy.

- Identify possible role in the state's capital construction program in year one.
- Develop and implement systems that ensure improved access, equity and diversity in funding programs.
- Investigate opportunities to leverage permanent fund to invest locally by providing access to capital.
- Research providing default insurance for loans to cultural institutions and projects in year two.

OBJECTIVE B:

Implement a more efficient donation process.

- Identify areas of improvement and research alternative online donation systems, including independent providers.
- Develop and implement new website donor interface, including mobile version and search feature for cultural organizations.
- Market and encourage online giving rather than mail or phone in year two.
- Research donor database systems that are compatible with website donor donation system.

OBJECTIVE C:

Improve and streamline operational and process capacity and effectiveness.

- Implement streamlining of application process, grant reports, data collection and reporting in year two.
- Review internal procedures such as meeting planning, travel and technology systems in year one.
- Implement annual evaluation of this strategic plan to review progress and respond to changes in year one.
- Fully utilize available Business Oregon systems.



Portland Art Museum's 2015 exhibition of "Ai Weiwei's Circle of Animals/Zodiac Heads: Gold (2010)." Photo courtesy of Ai Weiwei.



Restore Oregon's annual Heritage Barn Workshop at the historic Shipley-Cook Barn in Lake Oswego in September of 2015. Photo by Drew Nasto.

\$2.6 M STATEWIDE CULTURAL SUPPORT PROVIDED BY THE TRUST IN 2015

COUNTY/TRIBAL COALITIONS

\$14,400 Average award to a coalition in 2015
373 Average number of grants awarded by coalitions each year



CULTURAL DEVELOPMENT GRANTS

669 Number of Cultural Development Grants awarded to-date
\$7,300 Average Cultural Development Grant amount
\$6.7 M Total amount awarded in Cultural Development Grants to-date

DONATIONS

9,241 Total number of donations 2015
\$44.8 M Total raised by Trust to-date
\$26 M Trust permanent fund in 2015
\$4.56 M Total raised by Trust in 2015
\$535 Average donation to the Trust in 2015



HOW THE TRUST WORKS



CHANCES ARE, YOUR FAVORITE NONPROFIT IS ONE OF OURS.

HOW TO MAKE A DONATION TO THE TRUST

- 1** Donate to your favorite cultural organization(s).
- 2** If they're one of our 1,450+ qualified cultural nonprofits, donate **that same amount** to the Cultural Trust.
- 3** Take **that same amount** off your state taxes.

FACTS, DETAILS AND TRIVIA

Individuals can get a tax credit up to \$500. Couples, up to \$1,000, and Class C corporations up to \$2,500.

A state tax credit is an amount of money taken off the top of your final tax bill.

You might be surprised to find your favorite organization is one of our 1,450+ cultural partners. Visit CulturalTrust.org to find out.

Your donation is dispersed over all 98,000 square miles of Oregon to help keep old and new cultural opportunities available for all Oregonians.

Part of your donation goes into the permanent fund that provides interest for the Trust to disperse as part of its annual granting.

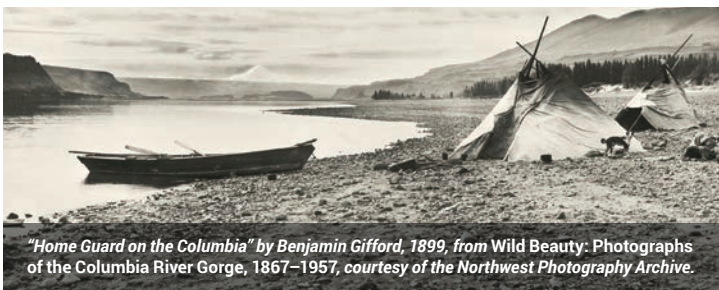
You can make a donation with stock rather than cash. Legacy gifts are also gladly accepted.

No other state in the union has this incredible benefit. Lucky Oregonians!



COUNTY AND TRIBAL COALITIONS

Baker County Cultural Coalition
 Benton County Cultural Coalition
 Burns Paiute Tribe
 Clackamas County Cultural Coalition
 Clatsop Cultural Coalition
 Columbia County Cultural Coalition
 Confederated Tribes of Coos, Lower Umpqua, Siuslaw
 Confederated Tribes of Grand Ronde
 Confederated Tribes of Siletz
 Confederated Tribes of the Umatilla
 Coos County Cultural Coalition
 Coquille Indian Tribe
 Cow Creek Band of Umpqua Indians
 Crook County Cultural Coalition
 Cultural Coalition of Washington County
 Curry County Cultural Coalition
 Deschutes Cultural Coalition
 Douglas County Cultural Coalition
 Gilliam County Cultural Coalition
 Grant County Cultural Trust Coalition
 Harney County Cultural Coalition
 Hood River Cultural Trust
 Jackson County Cultural Coalition
 Jefferson County Cultural Coalition
 Josephine County Cultural Coalition
 Klamath County Cultural Coalition
 Klamath Tribe
 Lake County Cultural Coalition
 Lane County Cultural Coalition
 Lincoln County Cultural Coalition
 Linn County Cultural Coalition
 Malheur County Cultural Trust
 Marion Cultural Development Corporation
 Morrow County Cultural Coalition
 Multnomah County Cultural Coalition
 Polk County Cultural Coalition
 Sherman County Cultural Coalition
 Tillamook County Cultural Coalition
 Umatilla County Cultural Coalition
 Union County Cultural Coalition
 Wallowa County Cultural Trust Coalition
 Wasco County Cultural Trust Coalition
 Washanaksha Cultural Coalition
 Wheeler County Cultural Heritage Coalition
 Yamhill County Cultural Coalition



"Home Guard on the Columbia" by Benjamin Gifford, 1899, from Wild Beauty: Photographs of the Columbia River Gorge, 1867-1957, courtesy of the Northwest Photography Archive.



Blanket towers by Marie Watt, whose work will be featured in "Art for a Nation: Inspiration from the Great Depression" at the High Desert Museum in spring 2016. Photo by Marie Watt.



STATE PARTNERS

Official State Partners of the Cultural Trust:

Oregon Arts Commission
 Oregon Humanities
 Oregon Heritage Commission
 State Historic Preservation Office
 Oregon Historical Society

Statewide cultural agencies:

Cultural Advocacy Coalition
 Oregon Folklife Network
 Restore Oregon
 Oregon Film
 Oregon Main Street
 Travel Oregon



Visit www.culturaltrust.org for comprehensive list of over 1,450 qualified cultural nonprofits in Oregon

Board of Directors:

Carole Morse, Chair, Portland
 Mike Golub, Vice Chair, Portland
 John Tess, Secretary/Treasurer, Portland
 Rep. Margaret Doherty, Tigard and SW Portland
 Sen. Elizabeth Steiner Hayward MD, Portland and Beaverton
 John Goodwin, Portland
 Nathalie Johnson, MD, Portland
 Gustavo Morales, Ontario
 Niki Price, Lincoln City
 Charles F. Sams III, Pendleton
 Bob Speltz, Portland
 Chris Van Dyke, Bend
 Gayle S. Yamasaki, Klamath Falls

Staff:

Brian Rogers, Executive Director
 Aili Schreiner, Trust Manager
 Carrie Kikel, Communications Manager
 Raissa Fleming, Administrative Assistant

775 Summer St NE
 Suite 200
 Salem, Oregon 97301

503.986.0088
cultural.trust@oregon.gov
www.culturaltrust.org