

Giving Forward

A Publication of Willamette View Community Funds

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Charting a brand new course for philanthropy

Oh what a year! It's hard to imagine it was just last December that we held the welcome reception for Carolyn Dickman and Loraine Collacchi and celebrated the opening of the new Development and Donor Relations office.



Dec. 3, 2014. Welcome party for Carolyn Dickman and Loraine Collacchi

To find the roots for this monumental new addition we need to look back five years. In 2010, when the U.S. and world economies were deteriorating, there was no clear sense for what the best choices for Willamette View should be. We needed a course, a road map. So a consulting firm was hired to guide us through the long-range planning process. Game-changing mileposts have been crossed since then, including a detailed look at the marketplace and inside our organization to understand our strengths and weaknesses and possible opportunities and threats. The outcome was the crafting of the "Vision 2020" strategic plan. In addition, we conducted a Facility Conditions Assessment, Energy Study and developed a Master Site Plan, examining Willamette View's aging infrastructure as well as growth areas and the optimal use of space on campus. And through the work of an advertising firm, we discovered a truism – Willamette View is about "expanding life." We're about purposeful individuals, a culture of wellness, a connected community, and a spirit of innovation.

Embracing Willamette View's innovative spirit served as the springboard for creating our philanthropy program. Once we identified the need to reposition Willamette View for the future -- adding more independent living apartments and houses, expansion of assisted living and memory care, redesign of our front entrance, and the continuing evolution of a signature Food and Beverage program -- we needed a way to support these long-range growth and expansion plans. So in December 2014, the Development and Donor Relations office was created and the formalization of Willamette View Community Funds as well as the subsequent Development Committee to direct our philanthropy programs.

The Development Committee and Willamette View Community Funds are vital to fulfilling our mission and vision into the future.

The support from the Willamette View Resident Council, residents, families, employees and business partners has helped to initially fund the Alan Fibish Employee Scholarship Endowment, the Riverview Project, resident assistance and various special programs. The response has been overwhelming.

Thank you to everyone who contributed to make our new philanthropy program a reality.

Craig VanValkenburg, CEO, Willamette View

When the need for financial assistance arises...

We never really know what the future may hold, and the Willamette View, Inc., Board of Directors and Administration understand the need for financial assistance may arise. Our purpose is to provide a safe, comfortable and enriched living environment and to support residents where we can, even before resources are depleted. Willamette View, Inc. provides a confidential service to help residents in maintaining their financial peace of mind.

“What happens if I run out of money?”

It's not just a contractual obligation, but the right thing to do -- providing assistance is an essential element of Willamette View Inc.'s tax-exempt, charitable status. It is also in the Articles of Incorporation, to work with residents in the event they should need financial support to continue living at Willamette View. Regardless of how well you have managed your spending and investments, there may come a time when you need assistance.

If you have a concern about your ability to pay your expenses at Willamette View, contact Brian Thompson, Chief Financial Officer, at 503-652-6618 for a confidential conversation.

A new dining space, a new dining experience

With a strong reputation for community involvement and history of innovation it's no surprise that Willamette View is thought of as a leader in the area of senior services. Yet we cannot stagnate and rest on yesterday's accomplishments. Times change, the marketplace evolves, and new groups of seniors venture forth into their retirement years. Whether it's constructing a building, remodeling outdated facilities, creating new programs or enhancing the lifestyle, growth has been an integral part of "our DNA" since 1955.

We are now poised for the next expansion – creating a space for a new dining experience at Willamette View. It's called the Riverview Project.

At the core of the project is maintaining dining as the social heart of the Willamette View community: a place to meet new people, hold stimulating conversations, laugh with friends, or enjoy an intimate dinner with a companion.



In addition to a new dining room, there will be a "bistro" with expanded hours, and a "marketplace" where residents can pick up specialty "to go" items. It's also about adding a much-needed modern kitchen with state-of-the-art equipment, well-designed workspaces and a wonderful new working environment for the kitchen staff.

The Food and Beverage team is looking forward to enhancing the Willamette View dining experience. Choices in venue, flexible hours and varied menus are just some of the ways that residents will benefit.

The Riverview Project brings together board members, staff and residents in a commitment to a shared goal. And it gives all of us the opportunity to realize a desire to contribute to the welfare of our community.

For information on the Riverview Project, call Carolyn or Loraine at 503-652-6202

Alan Fibish Employee Scholarship Endowment: an investment in the future

Residents have been encouraging Willamette View employees to further their education for decades.

The latest testament to this is the Alan Fibish Employee Scholarship Endowment, created this year to honor a former resident with seed money from Ernie ZumBrunnen and Alan's wife Carole. The endowment is administered by Clackamas Community College with educational options in 80 career technical programs. The current balance for the Alan Fibish Scholarship Endowment is \$61,655. Our goal is to reach \$500,000 to support scholarships.

Back in 1994, another resident, Bernard Lindeman, set up two scholarship funds in memory of his wife Marion, but they only offered financial aid for degrees in the health sciences. The Fibish scholarship offers greatly expanded career choices.



The first Alan Fibish Scholarship winner, Kristin Perry, is shown with Carole Fibish. Kristin, received \$2,500 to further her education in becoming a Registered Nurse.

The success of the Alan Fibish Scholarship Endowment with ongoing contributions demonstrates how deeply Willamette View residents care about staff and their futures. It provides employees not only a path to success but a sense of feeling valued and appreciated.

Meet the Willamette View, Inc. Development Committee

In late 2014, the Willamette View, Inc. Board of Directors established a philanthropy and charitable giving program and mandated a group be established to oversee it. The Willamette View Development Committee was born. It includes two board members — Sonja Connors and Greg Fitzgerald (chair); three Willamette View residents — Rikki Schoenthal, Ernie ZumBrunnen and Ron Nordeen; and four employees — Craig Van Valkenburg, CEO, Carolyn Dickman, Development and Donor Relations Manager, Loraine Collacchi, Development Coordinator, and Marilyn VanDeHey, Executive Assistant.

The purpose of the committee is three-fold: 1) To encourage charitable giving from residents, families, employees and community partners to support the Willamette View community; 2) To develop a diverse group of funds and be responsible, diligent caretakers of donations to ensure that the donor's wishes are honored; and 3) To prioritize projects and establish administrative processes to ensure compliance with state and federal guidelines.

The committee has met 22 times since 2014 for regular meetings of about two hours each, and on several other occasions for special sessions. Specific donor contributions and confidential information are never shared with the Development Committee members.



Community stores' contributions now self-directed

Willamette View residents give their most valuable assets to our community -- their time, talents, skills and patience, each in large quantities. In the stores alone, 92 volunteers work 162 hours a week for a total 8,424 hours a year; using the minimum wage of \$9.25 an hour as measurement that comes to \$77,922 in saved wages. In addition, the managers of the Carousel, Mart and Pantry have the added task of scheduling volunteers, making sure the stores are staffed and open for business.

For the first time in history, the proceeds from the community stores will be allocated to one of the new Community Funds, as jointly decided by the Resident Council and the Development Committee. Not only do residents donate goods and their time, but they will now have a say in how the money is to be used; a very major change.

Thank you to all the current and previous volunteers who've helped make a success of the Carousel, Mart and Pantry. Your contributions are priceless.

Many Ways to Give

Give Now

- ◆ Donate by cash, check or credit card.
- ◆ Transfer stock. You may avoid capital gains on appreciated assets*
- ◆ Make a tax-deductible gift of a paid -up life insurance policy.
- ◆ Donate marketable real estate.
- ◆ IRA required minimum distributions sent directly to Willamette View, Inc.
- ◆ Donate your car, boat, RV or other recreational vehicle.
- ◆ Donate art or jewelry.
- ◆ Donate in periodic installments.

Designate the Allocation of a Gift. Examples Include:

- ◆ Capital Fund — Riverview Project.
- ◆ Heron Fund — Benefits areas of greatest need.
- ◆ Benevolent Fund — financial assistance for residents. Donations may also be used to support Willamette View's healthcare and memory care programs.
- ◆ Alan Fibish Employee Scholarship Endowment.

Planned Giving

A significant gift to one of Willamette View's Community Funds may have financial and tax benefits* for you and your family. Contact Carolyn or Loraine for information on gifting strategies.

Willamette View, Inc. Development Office

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Loraine Collacchi, Development Coordinator, 503-652-6203

*Consult your tax advisor or attorney for details regarding how your taxes may be impacted.