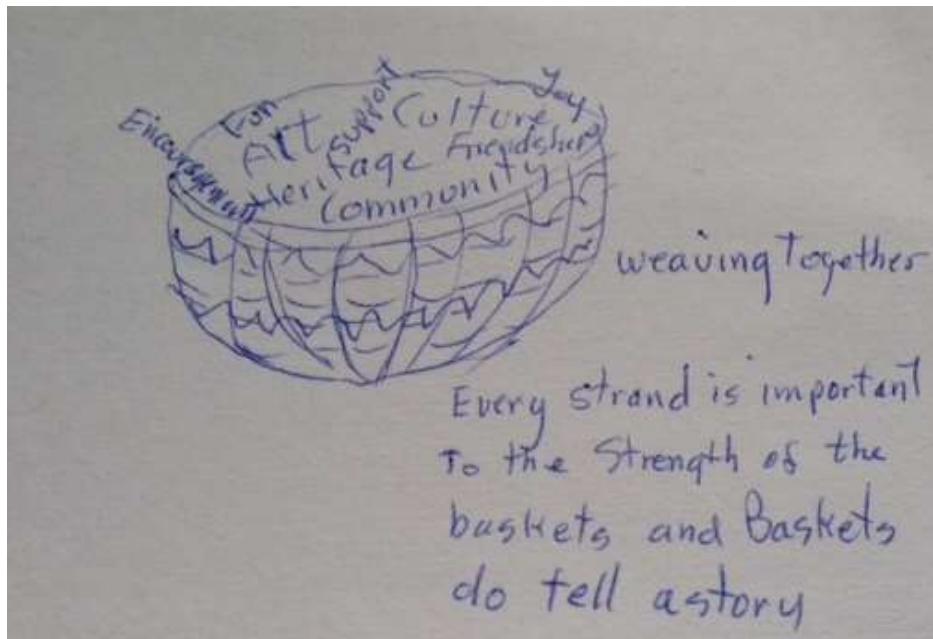


Oregon Cultural Trust:  
2014 CAPACITY-BUILDING PROJECT

# Oregon Cultural Trust

## Seven Regional Gatherings of County and Tribal Cultural Coalitions



a hand-written note and illustration  
submitted by a participant from the Central Oregon Regional  
Gathering of Cultural Coalitions

December 31, 2014

Submitted by Project Consultant Bill Flood,  
Cultural Trust Manager Aili Schreiner,  
and Community Arts Coordinator Brian Wagner

Sponsored by Statewide Partners of the Oregon Cultural Trust:  
Oregon Arts Commission, Oregon Humanities, Oregon State Historic Preservation  
Office, Oregon Heritage Commission, Oregon Historical Society

**Table of Contents**

Executive Summary .....3  
What We Learned: Key Findings and Recommendations..... 6  
Coalitions' Goals for the Trust ..... 7  
Recommended Trust and Partner Goals and Strategies..... 9  
Project Outcomes to Date: Opportunities ..... 13  
Project Process and Schedule ..... 14  
Participants..... 16

Appendices

A) Panelist Bios ..... 18  
B) How Can the Trust Best Support You (as a Cultural Coalition Member)? .. 25  
C) Notes from Gatherings..... 33  
D) Agenda and Key Notes Provided at each Gathering ..... 65  
E) History of Oregon Cultural Trust..... 69  
F) The Trust Future ..... 72  
G) Succession Planning (Reid) ..... 74  
H) Succession Planning (Callan) ..... 76

## Executive Summary

This report summarizes the results of organizing and facilitating seven regional gatherings of County and Tribal Cultural Coalitions in 2014. It provides information about project goals, process, participants, key findings and recommendations. The appendices provide detailed information on what Coalition members discussed in the gatherings.

**The primary purpose of this report is to inform the fall/winter 2014 Trust strategic planning process and possible Cultural Partner projects/investments.**

### **Project Overview**

Over 160 people (including staff from Trust partner agencies) participated in the seven regional gatherings held in Portland (Portland Metro, 30), Independence (Mid-Willamette, 22), Astoria (North Coast, 19), The Dalles (Gorge, 19), Grants Pass (Southern, 22), Bend (Central, 29), and La Grande (Eastern, 23). Gatherings successfully met our four primary project goals:

- 1) Stronger relationships and communication between Coalitions;
- 2) Better informed coalition membership about the Trust and the roles of Coalitions;
- 3) Strategies for engaging a wider range of citizens with local Coalitions;
- 4) Advanced thinking about collaborations and leadership succession.

The agenda of the gatherings achieved these goals in the following ways:

#### **1) Focus on both relationship-building and learning across Coalitions**

- a. We developed meeting materials to specifically update Coalition members. Materials are attached (Appendices D-H) and the agenda included time for Coalition members to ask key questions about the Trust, roles of Coalitions, etc. We specifically invited all participants to:

- i. Identify what they hoped to learn during the meeting;
- ii. Take time for un-answered questions.

#### **2) Facilitate discussions throughout meetings about outreach and engagement**

- a. We organized and facilitated a lunch panel of local leaders to tell their stories and stimulate learning about outreach and engagement. The Ford Family Foundation Leadership Institute offered advice about how best to accomplish this goal, and we framed the agenda accordingly);

- b. Discussions on leadership succession were embedded throughout meetings;
- c. We developed best practice materials to assist Coalitions (Appendices D-H).

Participants ranged from Coalition members who have been active with Coalitions since their inception to new members with less experience and understanding of the roles and responsibilities of Coalition members. Participants were especially engaged in:

- Practicing their Trust “elevator speech” with others, and reporting on that experience;
- Small-group work sessions that took place throughout the day;
- Hearing from local leaders about outreach-engagement and leadership succession during the lunch program;
- Asking and getting answers to questions that impact their work as Trust members and representatives.

The regional gatherings were long over-due. Coalition members are eager to improve their process, procedures and outreach, and do the best job possible in thoughtfully awarding funds. The Oregon Cultural Trust has not maintained a consistent level of support to nurture this essential grassroots network of volunteers. The Coalitions are doing good work with limited resources; however, some Coalitions have become increasingly disconnected from the Trust in the absence of consistent guidelines, resources, and communications. The most active and engaged Coalitions are often those with paid administrative support, a strong sponsoring fiscal agent, or otherwise strong local leadership.

Coalition members were initially unsure of what to expect, but quickly engaged with one another in problem-solving around key issues. Coalition members now look forward to connecting with one another (through the Trust), and receiving both notes from the gathering they attended and the final project report. A consistent high point in each gathering was the “lunch with locals” panel telling relevant stories of leadership and outreach/engagement. The after-lunch work session showed how the lunch panel informed and stimulated learning by the participants.

Coalition members consistently asked for greater **clarification** of, and stronger **connections** to, the Trust’s goals, policies and leadership. They requested more **communication** with each other and the central office, and are looking for **collaborations** where there is need and opportunity. Requests for help with the

challenges of maintaining **commitment** to the Trust's mission over time were also heard. Most Cultural Coalitions are working like small nonprofits and are encountering similar challenges as they work to fulfill their role.

## What We Learned: Key Findings and Recommendations

Appendix B lists the individual responses from gathering participants to the question “How can the Trust best support you (as a Coalition member)?” In summary, participants consistently invited the Trust to:

**Be the centralized leader between all the County and Tribal Cultural Coalitions, continue getting them together periodically, provide clear and consistent communications and guidelines and marketing/branding support.**

Coalitions consistently appreciate the freedom to select their own members, governance structure, grant-making structure, etc. but also are seeking more consistent leadership, guidance, and technical assistance from the Trust. Those members asking for additional clarity appeared to want to know where the boundaries or limitations are – where there is flexibility and where there is not. Immediate technical assistance from the Trust should reach out especially to those Coalitions which unable to participate in the seven gatherings. (See following section “Participants”.)

The following findings emerged through the gatherings.

- *Leadership/outreach/engagement with Coalitions* will only be achieved by getting out there, building relationships, creating new and diverse leadership and participation (including youth). Coalitions are eager to collaborate with one another and find better ways to increase their visibility and talk about what they do.
- *What approaches are working for Coalitions* – localized approach to grants management; close connection to communities, counties and tribes; transparency in process; a celebratory approach; maximizing dollars from Trust by matching with strong local projects.
- *Challenges with Coalitions* – Clarity, connection, communication, and collaboration in climate of scarce financial resources are needed; recruiting, training and maintaining membership is a struggle.

## Coalitions' Goals for the Trust:

### **Greater Clarification, Communication, Connections, Collaborations, and Commitment**

#### *Clarification*

Coalition members seek clarity in their roles as volunteer representatives of the Oregon Cultural Trust. They seek a reaffirmation of expectations, the mission and vision of the Trust, and their roles. While willing and able to develop county cultural plans and grant programs, Coalition members seek guidance to ensure that they understand and implement these to the highest standards.

#### *Communication*

This is perhaps the area identified by Coalition members as needing the most improvement. Considered local ambassadors for the Trust, the channels and frequency of communication between the Trust and Coalition members remain inconsistent. Not only do Coalition members seek greater dialogue (not one-way communication) with the Trust, they also wish to increase the exchange between Coalitions, strengthening their networks and sharing experiences. The Trust and its statewide cultural partners can provide an infrastructure to meet these needs, with abundant opportunities to recognize the Coalitions as satellites of the Trust who can help expand audiences.

#### *Connections*

Run primarily by volunteers, the Cultural Coalitions depend on strong connections with other local organizations, as well as the Trust, to meet the demands of their charge. Issues related to capacity and technical assistance can be addressed through new, renewed, and revitalized community and regional connections to resources. Leadership in making these connections lies with Coalition members, yet many find the grant making process and basic operational responsibilities leave little time for this work. The opportunity to support real connections (and more resources) exists for the Trust, its statewide partners, and within communities themselves.

#### *Collaboration*

To realize the ripe opportunities for collaboration/cooperation between Coalitions, the Trust, its partners, and cultural nonprofits across the state, Cultural Coalitions must feel confident in their roles, and their ability to communicate and build connections that successful collaborations require. All members expressed a desire to collaborate with each other; the necessary infrastructure and leadership

is, however, missing among a few Coalitions. Leadership from the Trust and its state partners could help facilitate this process.

***Commitment***

Now is the time to reaffirm the Trust's commitment as steward of its County and Tribal Cultural Coalitions. Continuing commitment by volunteer Coalition members is built on their understanding of mutual goals and their comfort with the support they receive. "Commitment" here means both financial (grants) and administrative support (on the Trust side, an area where smaller Coalitions struggle) as well as ongoing leadership through increased communication, leadership from the Trust and its partners, and transparency in the way we all work together.



## Recommended Trust and Partner Goals and Strategies

Trust Manager Aili Schreiner and Project Consultant Bill Flood summarized data from the gatherings to identify the following recommended goals and strategies for the Trust. Most present clear opportunities for statewide partner agencies to assist Coalitions with existing resources, and offer short-term solutions with maximum impact and minimal expense. *Longer term strategic proposals are italicized.*

### **Support increased Coalition capacity**

The most active and engaged Coalitions are those with paid administrative support, a strong sponsoring fiscal agent, or otherwise strong local leadership. The Trust should consider the following proposals to promote operations and administration:

- Easily accessible online resources are needed to support Coalitions – a special webpage, site, or intranet hosted by the Trust with access to resources ranging from Coalition contact sheets, grant forms, media and marketing or branding materials, tips for grant-giving, etc. This site would be a place that helps Coalition members help themselves and communicate with each other;
- Create standardized grant forms, processes, and reporting requirements;
- Organize annual or bi-annual regional Coalition meetings, similar to those in Fall of 2014, with times for Coalitions to gather and grow (similar to Oregon Arts Summit);
- Add Trust code for Turbo Tax on thank-you letters;
- *Coalitions deserve individualized technical assistance, based on their effectiveness, resources, needs, etc. Several Coalitions have identified the need to update their plans; this is a key area for technical assistance.*
- *Provide data from Trust back to Coalitions regarding grants awarded, people from local County/Tribes donating to Coalition, etc.*

### **Facilitate Coalition outreach and engagement**

- Utilize Coalitions as a network and support them with shared marketing and communication resources. Without consistent guidelines, resources, and communication, Coalitions risk becoming disconnected from the Trust;
- Provide training and tools to Coalitions to serve all more equitably in their counties, especially underserved communities;
- Provide simple methods to share and publish local success stories;
- Assist in cultivating local media relationships.

**Ensure Coalition members are equipped and comfortable serving as local Trust ambassadors, reinforcing the Trust's brand, message, and identity around the state**

- Provide name tags for Coalition members to wear to events;
- Create an updated, simple visual illustration and message explaining the tax credit process;
- Create a simple visual image showing relationships and roles of the Trust, statewide partners, and Coalitions.

**Build the Trust and cultural partners' capacity to work with Coalitions**

- Clarify how each Cultural Coalition reflects and supports the overarching goals of the Cultural Trust. Local communities need as many points of entry to Cultural Coalitions and cultural partners as possible; at the same time, there must be recognition of the maturity already achieved by the Coalitions.
- *Consider an advisory group (rotating membership) drawn from Coalition membership across the state to advise the Trust on policy and practical matters related to the Coalitions;*
- Many Coalition members do not understand the resources that partner agencies offer. Partner agency services, instructions, and resources should be listed on the Trust web site.
- Create a comprehensive grant calendar identifying partner resources.

**Ensure Coalition work remains a priority**

The Trust should consider the following options (by no means exhaustive) to best support the Cultural Coalitions with staff and/or paid consultants. These are not mutually exclusive; the best option is probably a combination of strategies. *To be considered by both Partners and the Trust as it completes its strategic planning process.*

- Hire additional staff to either serve Cultural Coalitions directly or take some existing responsibility (e.g. fund development) from current manager's workload, allowing the manager more time to focus on serving the Coalitions.
  - Pro: Investment and knowledge stays in-house with Trust.
  - Con: Unlikely that manager's time would really stay dedicated to Coalitions.
- Work with cultural partners to devise a delivery mechanism that also meets their needs and utilizes their resources.
  - Pro: Invests the partners more deeply with Coalitions, utilizes and supports the infrastructure of partners.
  - Con: Potential of competing interests among partners.
- Partner with existing statewide networks such as OSU Extension, the network of community colleges and universities, the Nonprofit Association of Oregon, Rural Development Initiatives, the Center for Community Development, and foundations with statewide coverage (Ford Family) etc.
  - Pro: Access to a statewide network.
  - Con: Could be a lot for the Trust to manage, and the Trust might lose control over the provision of technical assistance and services.
- Invest in a contractor to develop and facilitate annual regional gatherings and provide individualized technical assistance for all Coalitions. One goal for contractor should be to meet on-site annually with each Coalition.
  - Pro: One primary contractor for Trust to manage.
  - Con: Single source contractor, unless that contractor is part of a regional network(s).
- Invest in seven regional consultants to provide technical assistance and organization of regional gatherings. Another option here is to invest

additional funds per region for administrative support to Coalitions, especially in grant making.

- Pro: Accessible technical assistance specific to the region.
- Con: Trust must manage seven (or more) contractors, which could be expensive and time-consuming.

## Project Outcomes to Date: Opportunities

Great opportunity exists for the work of the Trust and the Coalitions. The Trust is the only cultural funding mechanism of its kind in the nation with local networks at the county and tribal levels. Opportunities for growth, cooperation, and collaboration are endless. The following are examples of outcomes already achieved through the seven regional Cultural Coalition gatherings:

- Seven regional gatherings, 160 plus participants, all cultural partners and Oregon Folklife Network engaged in planning and implementing gatherings;
- Coalition members are re-engaged and have an invigorated relationship with the Trust;
- Twenty-eight community leaders participated as lunch panelists and shared compelling stories and strategies to inform and stimulate thinking about leadership and engagement (especially with youth and younger families), and leadership succession;
- Coalition members have been introduced to actionable strategies to increase leadership and engagement (especially with youth and younger families) and leadership succession by panels of local leaders;
- Coalition members from counties and tribes established and/or strengthened their relationship with the Trust and with one another;
- Trust leadership has up-to-date knowledge about the condition of the Coalitions, including their challenges and resources and information about what support Coalitions are requesting from the Trust;
- Coalition members expressed a desire for more collaboration between counties and tribes;
- Strategies (to be compiled from notes in this report) specifically concerning outreach, engagement, and leadership succession;
- Briefing papers on leadership succession, history and future of the Trust, roles and responsibilities of Trust and Coalitions.

## Project Process and Schedule

The following chart shows key project activities by month. We learned that rushing Coalition chairs to help set agendas, meeting dates, and identify panelists was not the best way to proceed. The decision was made to postpone meetings from June-July to Sep-Oct to allow time for planning and outreach. Coalition members also told us that June-July is a very busy time for rural communities engaged with tourism.

Arranging the meetings and gaining buy-in of members required a great deal of time, e-mail and phone communication, and individual attention. However, attitudes of Coalition leaders turned from wary to helpful and friendly when they were listened to and treated with respect.

<i>Month</i>	<i>Key Activity</i>
Mar 2014	<ul style="list-style-type: none"> <li>• Consultant contract in place, work plan developed.</li> <li>• Meetings with Trust, consultant, and statewide partner agency representatives. An important focus of meetings was identifying how partner agencies wished to be involved, their goals for the regional gatherings, etc.</li> </ul>
Apr	<ul style="list-style-type: none"> <li>• Cultural Coalitions chairs and co-chairs polled to determine key issues/topics for gatherings and when and where they would like to meet.</li> <li>• Decision made to reimburse mileage for Coalition members traveling over 100 miles round-trip, to reimburse lodging if needed in order to gain participation from outlying counties and tribes, and panelists were offered travel reimbursement and a \$150 honoraria.</li> </ul>
May	<ul style="list-style-type: none"> <li>• Decision made to reschedule June and July gatherings for September and October.</li> <li>• Meeting agenda and format developed.</li> </ul>
June	<ul style="list-style-type: none"> <li>• Meeting dates and locations set.</li> <li>• Facilities identified.</li> <li>• Search begun for lunch panelists.</li> <li>• E-registration system designed.</li> <li>• Save the date postcards designed and e-mailed.</li> </ul>
July	<ul style="list-style-type: none"> <li>• Caterers identified.</li> <li>• Save the date postcards mailed again.</li> <li>• Continued search for lunch panelists.</li> </ul>

Aug	<ul style="list-style-type: none"><li>• Interim report prepared for September Trust Meeting.</li><li>• Extensive email and phone contact with Coalition Chairs encouraging them to send communications to their membership for registration.</li><li>• Continue search for lunch panelists.</li></ul>
Sep	<ul style="list-style-type: none"><li>• Local panelists identified, confirmed, bios developed.</li><li>• Meeting materials finalized.</li><li>• More outreach to Coalition members encouraging members to register.</li><li>• Six regional gathering organized and facilitated.</li></ul>
Oct	<ul style="list-style-type: none"><li>• One regional gathering organized and facilitated.</li><li>• Final report developed.</li><li>• Meeting held with statewide partners agencies.</li></ul>

## Participants

Following is a summary of participants per gathering, including representatives from statewide partner agencies. Not all partner agency representatives could attend all meetings.

<i>Date</i>	<i>Counties/Tribes in Region</i>	<i>Gathering Location</i>	<i>Number of Participants</i>
Sep 5	Multnomah, Washington, Clackamas Counties	Or. Historical Society, Portland	30
Sep 11	Yamhill, Polk, Marion, Linn, Benton, Lane County, and Confederated Tribes of Grand Ronde	Independence Events Center, Independence	22
Sep 15	Tillamook, Lincoln, Columbia, Clatsop Counties and Confederated Tribes of Siletz Indians of Oregon	Clatsop Community College, Astoria	19
Sep 19	Hood River, Wasco, Sherman, Gilliam Counties	The Dalles Discovery Center	19
Sep 24	Grant, Harney, Jefferson, Wheeler, Crook, Deschutes, Lake Counties, Confederated Tribes of Warm Springs, Burns Paiute Tribe	Deschutes Co. Library Administration, Bend	22
Sep 29	Douglas, Jackson, Klamath, Josephine, Coos, Curry Counties, Klamath Tribes, Confederated Tribes of Coos, Lower Umpqua, Siuslaw, Coquille Indian Tribe, Cow Creek Band of Umpqua Tribe of Indians	Grants Pass Museum of Art, Grants Pass	29
Oct 8	Morrow, Umatilla, Union, Wallowa, Baker, Malheur Counties, Confederated Tribes of the Umatilla Indian Reservation	Eastern Oregon University (in partnership with Arts East), La Grande	23

It was important that the meeting agenda and facilitated discussions provide resources and inspiration for both newcomers and long-time coalition members.



Representatives from the following counties or Tribal Cultural Coalitions were not able to attend:

- Burns Paiute Tribe
- Confederated Tribes of Coos, Lower Umpqua, Siuslaw
- Confederated Tribes of Siletz Indians of Oregon
- Coquille Indian Tribe (although a Coquille member participated as a panel member)
- Cow Creek Band of Umpqua Tribe of Indians
- Coos County Cultural Coalition
- Lake County Cultural Coalition
- Morrow County Cultural Coalition
- Sherman County Cultural Coalition (although a panelist from Sherman County participated)
- Wallowa County Cultural Coalition (participant registered but was too ill to attend; a panelist from Wallowa County participated)
- Wheeler County Cultural Coalition

**Appendix A****Bios of Lunch Panelists****Portland Area Gathering of Cultural Coalitions  
September 5, 2014**

**Ronault LS (Polo) Catalani** manages the City's New Portlander Programs. His family's ethnic population were expelled from Indonesia, resettled in the Netherlands, then in Salem. He is an activist lawyer on the West Coast and in Southeast Asia, journalist, teacher and highly beloved organizer in Portland. He and his wife Chompunut Xuto founded the multicultural and all-abilities community-building organization, Colored Pencils Art and Culture Council.

**Roberto Franco** is Director of the Latino Partnership Program at the Oregon Community Foundation. Prior positions include Program Manager at the Oregon Housing and Community Services Department and Executive Director of the Farmworker Housing Development Corporation in Woodburn. He believes deeply in the power of culture and developed a new facility at FHDC specifically for education and culture.

**Martha Rampton** is the Director of the Center for Gender Equity (CGE) at Pacific University, Forest Grove. CGE's mission is to support gender equity through dialogue, programming, service, research, education, and advocacy in order to facilitate collaborative, humane, and sustainable University, local and global communities. CGE focuses on student leadership development and community engagement; the organization has been awarded funds from the Washington County Cultural Coalition for its work with community youth.

**Jane Reid** has lived in Estacada since her car broke down there in 1977. She is an active volunteer on the boards of Estacada Area Arts Commission, Estacada Summer Celebration, Estacada Together (a presenting and arts education organization), and the Clackamas County Arts Alliance. She was a founding member of the Clackamas Cultural Coalition and two years ago was selected as a Ford Family Foundation Community Fellow. Jane worked for 13 years as a grant writer, program coordinator and editor with Young Audiences of Oregon & SW Washington. (Jane was unable to attend and Tonisha Toler, Community Liaison at the Regional Arts and Culture Council graciously stepped in and served on the panel.)

**Mid-Willamette Gathering of Cultural Coalitions**

**September 11, 2014**

**Cecelia 'Cec' Koontz** is passionate about developing connected communities and currently indulges that passion by volunteering as a Monmouth City Councilor. She is also a nominee for the Western Oregon University Board of Trustees. Her day job is as the Business Manager for the Central (Monmouth-Independence) School District. She is a proud graduate of the Ford Institute Leadership Program (for rural community leaders around Oregon) and the Pacific Program for leaders in public service. After years as an active participant and board member with several Salem arts organizations, and as a non-profit consultant, Cec is thrilled to serve as a regular reader on grants panels for the Oregon Arts Commission and Oregon Cultural Trust – helping organizations dream their dreams and fulfill their missions.

**Cynthia Spencer** is the Director of The Arts Center in Corvallis. She has been a studio potter since the early 1980's, has held leadership roles in the statewide Oregon Potters Association and was Director of Corvallis Fall Festival for nine years. She feels she was called to direct The Arts Center so more people will listen when she stands on her soapbox to preach the gospel of The Importance of The Arts.

**Mary Stern** is the Community & Economic Development and Transportation Policy Manager for the Association of Oregon Counties, a membership organization representing all 36 of Oregon's Counties. AOC is dedicated to improving the ability of county government to serve Oregonians. Mary previously served as a Yamhill County Commissioner for over 11 years and as the Attorney Advisor at the Federal Correctional Institution in Sheridan, Oregon. Mary is a true believer in government responsibility and the Martha Mead quote: "Never doubt that a small group of thoughtful, committed citizens can change the world; indeed, it's the only thing that ever has."

**Matías Trejo De Dios** is a Spanish-speaking culture specialist. He has 20 years of experience with the Oregon Spanish-speaking community in the areas of arts and culture, education, mass media, public government and politics. He is a member of the City of Salem Cultural Board, member of the KPCN-LP "Radio Movimiento" Programming Board, and is the president of the Instituto de Cultura Oregoniana, a new organization that promotes the use of the Spanish language and bilingualism as a way to accomplish cultural preservation and economic prosperity.

**North Coast Gathering of Cultural Coalitions  
September 15, 2014**

**Kim Cavatorta** has served as the Executive Director of Community Arts Project for 20 years. Other positions held include Associate Director of Sitka Center for Art and Ecology, Literacy Tutor Program Coordinator and ESL Instructor for Tillamook Bay Community College, technical writer for a Portland-based medical software company, and Tillamook County Arts Network (TCAN) founding and current board member.

**Cydonie Fukami** is an Educational Tech Park Ranger at Lewis and Clark Historical Park. Three months ago she transferred from the Bureau of Reclamation, Grand Coulee Dam. In addition to her career with the Department of Interior she served three years in the U.S. Navy. She enjoys being a Clatsop County resident and is raising two teenage daughters with her Japanese husband. She is a registered tribal member of the Piapot First Nation and is African-American.

**Tom Hurst** is a marine biologist with the National Marine Fisheries Service in Newport Oregon. He is co-chair of the Lincoln County Cultural Coalition and Vice President of the Central Coast Soccer Association. He is Past-President of the Newport Symphony Orchestra. He is committed to community engagement across the arts, athletics, and education.

**Margaret Magruder** is the managing partner of Oregon Shepherd, LLC, a manufacturer of all-natural wool building insulation in Rainier, Oregon and the owner/operator of a farm in Clatskanie, Oregon. Margaret is also the Coordinator of the Lower Columbia River Watershed Council. She serves on several national, regional, and local agriculture, environmental and policy groups; including the Clatskanie Historical Society and the Lower Columbia Estuary Partnership. Margaret's career in production agriculture provides her a foundation in conservation and environmental issues as well as fostering a deep appreciation for the Lower Columbia River region and its history.

### **Gorge Gathering of Cultural Coalitions September 19, 2014**

**Arlene Burns** is the president of the Mosier City Council and soon to be mayor. In her spare time she is a filmmaker, currently working on films about the Historic Highway and archiving Mosier's stories. Prior positions include festival director of Telluride's Mountain Film Festival and The Blue Ocean Film Festival in Monterey, CA. For a decade, she hosted outdoor and educational programming for PBS, NBC, ESPN and ASCN. Prior to that, she was based in Kathmandu, Nepal, leading

whitewater and trekking expeditions in the wilds of the world.

**Columba Jones** currently serves as the Principal for White Salmon Valley Intermediate School within the White Salmon Valley School District. She began her professional career in education as a Middle School ELL, Language Arts, and Literacy Instructor at Wy'east Middle School in the Hood River County School District. After having served as a mainstream classroom instructor, she embarked in the journey to pursue a leadership role in school administration.

**Sandy Macnab** has been an OSU County Extension Agent for 36 years in Sherman and Wasco Counties. He's been recognized by the National Association of Wheat Growers for Excellence in Extension, was presented the Johnston Leadership Award in Extension, was the 27th member inducted into the National County Ag Agents Hall of Fame, served as Grand Pooh-Bah of the 2009 National Conference for the county agents group. And more recently he was awarded the Agricultural Achievement Award by The Dalles Area Chamber of Commerce. He achieved the rank of Professor in 2003. He serves on many boards and in advisory capacity for several more. He is a father to three and grandpa for two.

**Gregory Smith** is the Executive Director for the Columbia Center for the Arts. Previously he served as the director of audience development at the Denver Center for the Performing Arts in Denver Colorado. He is an actor, director, theatre arts educator, facilitator and administrator; he has worked with diverse populations of learners from pre-school through adulthood.

### **Southern Oregon Gathering of Cultural Coalitions September 29, 2014**

**Freda Casillas** is Audience Development Manager at the Oregon Shakespeare Festival. She is responsible for developing and managing the external plan and strategy known as "Cultural Connections" that broadens the range of people who attend Oregon Shakespeare Festival performances with an emphasis on ethnic diversity. She has been instrumental in spearheading the internal diversity and inclusion initiatives at OSF.

**Menno Kraai**, an Illinois Valley resident for over 35 years, is Executive Director of the Illinois Valley Community Development Organization, General Manager of the Chateau at the Oregon Caves National Monument, and former founding director of the Illinois Valley Family Coalition. He is engaged with multiple community projects and is a consistent advocate for the arts and culture in the Illinois Valley.

**Julia Willis** is the Grants Coordinator for Spirit Mountain Community Fund. She has been involved in Tribal Philanthropy since 2007, and is dedicated to serving the Tribal communities of Oregon, as well the many non-profits improving the lives of all Oregonians. She was previously the Administrator of The Coquille Tribal Community Fund, and is a member of the Coquille Indian Tribe.

**Gayle Yamasaki** is committed to working with young people and her community to give artistic expression and voice to this place we call home. She was most recently involved with an interpretive art project utilizing the World War II Tule Lake Segregation Center as the site for middle and high school students in Klamath County responding through drawings, paintings, and quilts to the story of the Japanese-American experience at Tule Lake. She is the Director of 21st Century Learning Programs for Klamath Falls Schools.

### **Central Oregon Gathering of Cultural Coalitions September 24, 2014**

**Kevin Barclay** is Assistant Director for the Deschutes Public Library District. Currently he serves on the Arts and Cultural Alliance Board, Bend Cultural Tourism Fund Commission, Deschutes Cultural Coalition Board, and the Homeless Leadership Coalition Board. He strongly believes in engaging communities with arts and culture where they live, work and play by fostering unique and varied partnerships.

**Karina Feigner** is the director of the community organization, la Luna, a folkloric dance team in Madras. She is also the owner and dance and fitness instructor at Studiok. Prior positions include Advisor of the Cultural Enrichment Club at Madras High School and Advisor of the Cultural Dance Club at Jefferson County Middle School. She strongly believes in bridging the gap between cultures through dance, and she founded the local community group, La Luna, specifically for helping enrich our youth and community in the various cultures of Latin America. Karina is also a former member of the Jefferson County Cultural Coalition.

**Brigette McConville** is a wife and a mother; the owner of Salmon King Fisheries, a commercial fisher on the Columbia River, an Oregon Historical Society Board Member, Columbia River Intertribal Fish Commissioner for the Confederated Tribes of Warm Springs (CTWSRO), a member of the CTWSRO Fish and Wildlife Committee, Indian Head Casino/Kahneeta Resort and Spa Board Member, a resident artist for the Confluence Project working with schools in the Columbia

River Gorge, and a bead artist, basket-maker, cultural plants documentation and quilter. Previously, a graduate of Oregon State University, CTWSRO Cultural Anthropologist, CTWSRO Culture and Heritage Committee Member, CTWSRO Washanaksha Member, Farm Service Agency member. Youth, culture, education and the combination of the three in a fun, loving and friendly environment are always a focus for Brigitte.

**Debby Peckham** is the Founding Advisor for the Harney County Arts in Education Foundation and the Chair of the Mary V. Dodge Regional Performing Arts & Education Center development effort. An honors graduate of Boise State University School of Music, Debby is a professional clarinetist, solo accompanist and private music teacher. A passionate volunteer, Debby strongly champions music and arts education for the children of Harney County and the central/eastern Oregon region. She was recognized as Harney County Woman of the Year 2013.

### **Eastern Oregon Gathering of Cultural Coalitions October 8, 2014**

**Roberta "Bobbie" Conner** (Umatilla, Cayuse, Nez Perce) is a member of the Confederated Tribes of the Umatilla Reservation in Pendleton, Oregon. She is Director of the Tamastlikt Cultural Institute, Immediate Past Chair of Board of Trustees of the Smithsonian's National Museum of the American Indian, and winner of the EcoTrust's Indigenous Leadership Award in 2007. She was also a founding Board Member of the Oregon Cultural Trust and a champion for the development of the program that supports and funds county and tribal-based cultural coalitions.

**Sara Miller**, facilitator and development specialist with Northeast Oregon Economic Development District, works to help rural communities create their own destiny. Since 1994 she has enjoyed working with community leaders and volunteers to develop and complete important projects in their hometowns. Having seen the power of people who are motivated to make good things happen, Miller is grateful to be able to participate in rural development in Wallowa, Union and Baker counties. She is currently enjoying working on value-added and next generation agriculture, new financing options for local businesses, and arts and culture initiatives.

**Gustavo Morales** is a third year Medical Student at National College of Natural Medicine. He serves on the Board of Directors for Rural Development Initiatives and works with Treasure Valley Community Resource Center in Ontario, OR. He

hopes to help create programs to develop leaders and provide resources in underserved populations with an emphasis on Latinos.

**Maurizio Valerio** is the Eastern Region Regional Program Manager for Rural Development Initiatives (RDI), a non-profit statewide organization whose mission is to enhance economic vitality in rural communities. He was born and raised in northern Italy and landed on the American continent following a life-long dream. He has raised his family in Oregon mixing horses and cattle with internet, databases, book publishing, community work and academia. He met RDI and The Ford Family Foundation as a graduate of Ford's Leadership Program and he has been honored to work with these great non-profit-community-building groups for the past several years all across Oregon.



**Appendix B****How Can the Trust Best Support You (as a Coalition Member)?**

All participants at the 2014 Regional Gatherings of Cultural Coalitions were asked to write (on a 3 x 5 card) a response to "What can the Trust do to best support you as a Coalition member?" Following is a list of responses, categorized according to major themes. The clear central message from participants is:

**Be the centralized leader between all the Counties and Tribal Cultural Coalitions, continue getting us together periodically, provide clear and consistent communications and guidelines and marketing/branding support.**

**Marketing assistance from OCT**

- What we need from OCT: practical public relations/marketing material that tells people why it's valuable for them to contribute to OCT and how the tax credit works. Not the fancy photos w/ Oregon celebrities – not useful to those of us in the trenches.
- A template and/or a site to get our Coalition better exposure on-line. Walk us through it.
- Host/blog/forum for board members.
- Send lone nut? (video link)
- Provide a computer program/model for developing an inventory or index of artists and organizations of services.
- Links on OCT website to local Coalition site.
- What we need from OCT: practical public relations/marketing material that tells people why it's valuable for them to contribute to OCT and how the tax credit works. Not the fancy photos w/ Oregon celebrities – not useful to those of us in the trenches.
- Stop changing deadlines and forms.
- Better OCT online forms...easier to use.
- Marketing support from Oregon Cultural Trust to Coalitions.
- A travelling communications intern? Helping us tell our stories (and package them).
- Improve website reporting format – currently not user-friendly.
- Develop a clear message for the mission of the Trust, role of Coalitions.
- Can we have marketing dollars for each County – that doesn't take grants away from grantees?
- Trash your website and make one that's faster and easier.
- OCT could help Cultural Coalitions by:
  - getting the word out that we exist and what we do.

- listing all Coalition deadlines on OCT website.
- Give us language for an elevator speech...short and sweet.
- OCT has a message (Brand) that is different from the County Coalition. What should our Brand be?
- We need a more interactive venue for cultural Coalitions to be in touch with one another. Website??? (share info, ideas, success and failure stories)
- How can the Trust support the Coalition? Come up with a short, catching ad campaign – “ice bucket challenge” to raise profile of Trust and Coalitions – which will make all work easier. Get message out.
- How is the Trust relevant to everyone? – People, individuals, communities – who may not go to plays, museums, symphonies, etc. How do you help people realize the culture, or art that is around them in their everyday life...and hence creates support for the Trust?
- I need to go to the website and find out what you do for us.
- Make pins, ask me (Pat Schmuck...patschmuck@gorge.net)
- Make hard pins with THIS IS CULTURE. ASK ME.

#### **OCT to act as central communicator**

- Clear, simple explanation of tax benefits.
- Boiler plate on web to ensure clear, financial responsibility: grants, reporting, record keeping.
- Address the question for greater coordination from top down for standardized forms and processes of applying for grants. (Policies and procedures as a structure to be somewhat individualized from County to County).
- Simple, updated guidelines.
- Stop changing deadlines and forms.
- Consistent communication.
- The OCT can benefit me as an individual by clearly presenting all opportunity for cultural advancement.
- Being a conduit for sharing good ideas/successes. But also sharing of unsuccessful ideas and meeting.
- Provide clear linkage from OCT to donors in a County to that County's Cultural Coalition – i.e. provide names, addresses, emails of local contributors to a Cultural Coalition for
  - local additional donors
  - possible new board member recruitment
  - provide materials, training about tax credit and also to do a better job of advertising the credit to the general population

- Rather, or in addition to, than depend on each individual to carry the tax deduction/tax credit message to people, come with a public awareness public information program to educate the public about the program.
- Templates for reporting.
- Communicate and consider the Coalitions as partners. When changes happen, grant amounts are determined – let us know at the same time as the press. We can be extremely valuable resources if considered as such.
- Clarity of Trust expectations of the Coalitions.
- Provide Trust info to Coalitions to be better ambassadors (sample letters, elevator pitch).
- Provide media relationships.
- Inform us of other grant opportunities that our Coalitions might be eligible for.
- Provide avenue to Coalitions to showcase successful grantees' accomplishments
- Allow as many emails as a Coalition requests (on statewide contact sheet)...can't do jobs efficiently – too much burden on one person. Expand support staff or get
- Streamlined reports.
- Please activate [jococulturalcoalition.org](http://jococulturalcoalition.org).
- Keep CCC websites up to date, esp. contact info and grant deadlines. Or is there a CCC/Tribal FB group?
- OCT database enhancements
  - Basic info...toolkits for Coalitions
  - Easier reporting process(es), more user friendly
  - Report/data entry by grantees (e.g. "exhibitors" registering for a trade show)
  - Centralized application system
  - Then, validated by Coalitions
- OCT website should include every Coalition's grant cycle dates and criteria – maybe a calendar?
- Improved grant reporting website (less clumsy).
- Telling stories.
  - The OCT can give a clear pathway for Coalitions to deliver grantee stories and photographs.
  - This is talked about but it's unclear how these should be collected and delivered.
- Database - a google drive collection of County bylaws, plans, grant guidelines to review and share ideas.
- Help share info about grantee projects/programs.

- Define the goal –
  - Donors to OCT?
  - Members on CCCs?
- Grant applications?
- Different strategies needed for each.
- The Trust can feed information and stories back to the Coalitions and Tribes about how their work is making a difference in local places across Oregon.
- Create mechanism for Coalitions to have a calendar for funded activities.
- Provide the Coalitions with a list of donors to the Trust. Help us engage those donors in our County to support their local arts and culture organizations and participate in the tax credit program. We need to make the story more local, relevant, inspiring.
- Note for Aili – Can OCT add to the gift acknowledgement letter the code for the tax credit for Turbotax? Several people say they find it a hassle to look it up every year.
- Make reporting easier and more user friendly.
- Clarify and simplify the web interactive process for reporting organizational info. I find the more difficult than reporting projects, but I don't find site user-friendly.
- Ensure transparency.

#### **OCT to facilitate collaboration opportunities**

- Networking with other County Coalition members.
- Thanks! Today was helpful! Enhance on-line communication and networking across the state's Coalitions and between Coalitions and the Trust leaders.
- Keep up and put updated Coalition contact information on OCT website.
- Facilitate further communication between Counties.
- We would love to have a strong and caring relationship with you in order to make the Oregon Cultural Trust help us help you...all Oregonians.
- Insight into great projects undertaken by Coalitions. Examples of best practices.
- Gather a working group of Coalition members from around state to work with OCT staff to help refine OCT's role in supporting Coalitions.
- Regional convenings.
- More regional meetings.
- Develop a state advisory board of Coalition members.
- Full time Coalition Trust person to work with Coalitions.
- Visit Cultural Coalitions across the state, build relationships, provide support/guidance.

- Continue letting regional Coalitions meet occasionally – even every 2 years like Regards to Rural (RDI).
- More regional convenings tapping our strengths.
- Facilitate regular opportunities for Coalitions to gather (like today!) (i.e. annual or semi-annual).
- Regular regional coverings and multidirectional dialogue between the Trust and the County Coalitions.
- Trust can provide Coalitions with guidance and support around our cultural plans and granting processes. Communication in terms of this type of meeting as well as support is essential. Thank you for the wonderful program!
- Networking opportunities...statewide info sharing.
- Attend one of Wa Co Board meetings.
- Please send us a list (w/ contact info) of everyone who attended today.

### **OCT to provide resources**

- Financial
  - Ongoing, continuous, reliable funding for Oregon Folklife Network – and, more importantly, keeping OFN in the loop re: local CCC issues, needs, partnerships/let CCCs know about OFN and what we can offer. Thx for including OFN.
  - We could use greater funding.
  - Keep disbursing funds.
  - Provide capacity-building initiatives.
  - Leverage additional funding for Coalitions.
  - Ford or OCF grants to tour w/ training.
  - More \$.
  - Liability insurance – an evil I had no considered!
- Human
  - Hire someone to coordinate and support the local efforts – full time.
  - Ensure all Coalitions have admin support: a part-time position, paid at a standardized rate despite size of County, population, or OCT funding amount.
  - Send new communications person to each county's "star" event and video document.
- Informational/structural
  - Website repository of app forms, evaluation criteria.
  - For each of 45 local Cultural Coalitions, do a local timeline like the one in this packet w/ formative org steps, \$ into each, \$ out from each,

current status, including leadership history or membership of Coalition's history.

- Use what OCT has collected to advance next stage of growth.
- Ford or OCF grants to tour w/ training.
- More on-line tools (ad templates, samples, plans)
- I think the Trust needs to make sure all Coalitions are able to share good working documents with all people.
- Ability to access final reports on OCT website – what has funded what...who is doing what?
- It would be great if Coalition plans were all online, too (or are they)?
- Data on economic development.
- For Aili – By providing updated Coalition Chair contact info and Coalition grant info/deadlines, so we can push that out to our statewide contacts (and communicate about OH grants and services too).
- Advisory regarding approaches to grants for potential grantees.
- Weaving Together. Every strand is important to the strength of the baskets and Baskets to tell a story – encouragement, fun, art, community, heritage, friendship, support, culture, joy.
- Resource for articles – guest articles for newsletter to tell the Oregon Cultural Trust story.
- More knowledge about other-than-Coalition grants so Coalition grant recipients can apply for other grants.
- Support
  - More tech assist; celebration plus thanks/recognition, face time (w/ CT staffing), results info.
  - Make the volunteer job as easy as possible!
  - Continue support but don't micromanage us.
  - Keep looking for ways to be more effective.
  - Recognize admin/mgmt. needs of Coalitions and invest Trust funds to support them.

### **OCT to foster engagement**

- Grant participants
  - Shorten the text required by grant recipients to include in press releases.
  - Short = more likely to be used, less likely to be edited out by publicity outlets.
  - Grant evaluation tool as outreach to applicants who did not receive grants.
  - Improved tech – simplify on-line grant reporting

- Sometimes grant opportunities are diluted in other e-blasters or messages. The suggestion for an annual calendar for the Coalitions that listed grants available (w/ deadlines) amongst other items specific to the Coalitions.
- Continue to provide flexibility in grant making
- General
  - Person-to-person engagement on a regular basis.
  - Need to attract new membership, establish appropriate succession of group leadership to avoid burn-out, encourage engagement of general public with participation at all levels. In short, spark interest.
- Facilitate diversity.

### **OCT to provide technical assistance/training/education opportunities**

- Help the forming of the Arts Alliance in Southern Oregon.
- Diversity training, including LGBT issues.
- Ideas/methods for rural outreach = we need to create greater demand for available grants.
- More guidelines:
  - Can we be a 501c?
  - Some Counties are?
  - Can and should we fundraise?
- Leadership training.
- Provide regional or local grant-writing workshops for free! Open to all Coalition members.
- Visit Cultural Coalitions across the state, build relationships, provide support/guidance.
- Provide local training and/or w/ other Coalitions:
  - grant writing
  - report writing
  - understanding/sharing what “cultural” means to you/others
- Share cultural development through options of engagement sustaining self-awareness, self-interest, self-directive healing and life choices.
- Technical assistance (training, administrative streamline), promotion
- I could use help in creating an orientation plan for new board members.
- Resource for educating people/groups on how to best request funds from the local CCs and other areas to find funding.
- How can the Trust be accessible with questions about resources?
- Need help crafting the case for support – short and impactful.

### **OCT to provide more regional gatherings of Cultural Coalitions**

- Thank you!!! For leadership luncheon! Would love some more of these events.

- More workshops like this.
- A yearly gathering such as this is helpful.
- Trust can be helpful by supporting regional sessions like today. Thx so much.
- OCT can help our local Cultural Coalition by providing opportunities like today on a more regular/scheduled basis and contact info for other Coalitions.
- More gatherings such as today.
- Have a gathering like this annually or bi-annually...it's a great way to share w/ others.



**Appendix C****Notes from Regional Gatherings**

*Following is a collection of the notes from the seven gatherings. Notes are shown following the primary questions posed at each gathering. Numbers next to notes (x2) indicate the number of times this particular issue was raised or comment made.*

**Gathering Ground Rules**

- 1) Start on time, end on time
- 2) Don't tell other's stories without their permission
- 3) Encourage all to participate; practice listening
- 4) Cell phones on silent

**What do you want to learn from the day?****Resources**

- How to get more \$ from Clackamas County into Trust
- Resources, connections between students, Coalitions
- What resources would help you?
- Find out resources for cultural inventory project
- Ways that Coalition can raise \$
- Limited \$, grants
- Grant opportunities beyond Cultural Coalitions

**Engagement/visibility**

- Need more applicants for grants
- Burn-out/recycling members...need new members
- How to get more ideas, more people involved
- Gilliam Co. youth slot needed
  - Senior project...or maybe better to have Jr or Sophomore
  - Culture in school
  - Trust should provide something specific to help us here
- How to reach Spanish-speaking community
- Need more and different local publicity
- Reach out/awareness/engagement
- Hear from others, grow
- How to extend reach within all of Multnomah County
- How to bring fresh members on

- Insights, inspiration, meet people, interested in engagement—what's working what's not
- Recruiting, retaining new board members
- Younger board members
- Hear ideas, outreach/applications, increase participation
- Challenge to find members
- More outreach around County needed
- Learn more about increasing local involvement
- Get to know one another
- Need more applicants for grants
- Want perspectives
- Burn-out/recycling members...need new members
- "Caught Doing Culture"
- How to get more ideas, more people involved
- Youth...need to do something specific
- How to reach Spanish-speaking community
- How to get the word out to grantees
- Listen, what others are doing
- Meet, learn
- License plate?
- Award night
- Insight, broaden involvement, recruitment
- Community engagement
- Encourage participation
- New applicants, how to get to be better ambassadors
- Outreach
- Outreach, schools
- Relationships
- Need to update plan to recruit new members
- How to reach individuals and organizations
- Board recruitment, how to apply for grants, leadership
- Recruitment, get to know people
- How to reach out

#### Programming

- Youth...need to do something specific
- "Caught Doing Culture"
- More integration of history
- What we can do beyond grant-making

### Planning/structure

- Learn more about Trust and Coalitions
- What we can do beyond grant-making
- Want perspective
- Lay of land
- Make Coalitions reflective of diversity
- How other Coalitions operate
- How Trust connects with local Coalitions
- Revitalize!!! Original Trust plan, build Corpus
- Possible liability insurance for board? Aili to research
- THIS IS CULTURE
- Croak Book/Alien Abduction (for leadership succession)
- Succession on our minds
- How others are re-writing goals, streamlining application

### Collaborations

- Partnerships (x2)
- How 3 Coalitions can collaborate
- How Heritage Commission can be supportive
- Cooperation between Counties
- How Heritage can be resource
- How Arts Commission can support
- Networking (x4)
- Learn more/Coalitions can support outreach beyond grants
- Share, collaborate
- Seek to understand his role as Coalition co-chair, build relationships
- How Humanities can support your work...Oct 31 Humanities deadline...Veterans
- How OAC Community Arts Development can support you ABC grants, Oct 1 deadline: \$3-7,000
- More intersection between groups
- Learn what is working
- Collaboration
- Cultural partners...what we can do to support one another
- Info/share
- Coop Work Experience Students @ community college
- Ability to network/collaborate with other Coalitions
- How to better share across Coalitions
- Connections with partnerships

## Communications/education

- Ways to articulate how CT works
- Better understanding of the Trust and its future
- Tips on how Coalition can get out word about Trust
- Awareness
- Educate about Oregon Folklife Network
- How to tell Trust story
- Strengthen local Coalition
- Reporting system on-line needs...help!
- Mentor grantees...letter of intent, then mentor committee
- What is a leader?
- What are OCT guidelines? Flexibility within that?
- How we are educating people about tax credit
- How to get Coalition identity out
- Speak with each of Counties...how grant-giving works
- Knowledge of Trust, around state
- Sense of Coalitions
- Need elevator speech
- Expansion of mission through County
- Clatskanie...lots of local culture
- Connection between Trust and Coalitions
- Need more and different local publicity
- Learn more about Trust and Coalitions
- Get word out/resource we are
- Difference between
  - credit and deduction
  - tax deduction/donation to non-profit
- Understanding of Trust
- Clarify Trust story
- Stories on Trust website
- Communication...what's working, what's not
- What's working/not
- Mailing list, e.g. legislators, tax preparers, etc.
- Myth that \$ goes to PDX
- New definition of endowment...invest in people
- Follow each of us around
- Clarity, inspiration, direction
- Communication...how to help through Chamber
- Better understanding
- Understanding of re-granting

- How Trust works (x3)
- Learn more about Trust
- Forever learning
- Message
- Pitch...legal...ethical
- Pitch impact, full circle
- How Coalitions work
- Difference between tax credit and deduction
- How we/Coalition facilitates use of funds...help grantees
- Coalition behaviors that are working
- How to spread \$ wisely, rules

### **Issues around leadership and outreach/engagement**

#### Organizational

- Recognize ways of being dominant culture
- Trust concept could be applied to Counties
- Coalitions with professional management have better chance of sustaining themselves
- Do roster of participants from today
- Dedicate funds to administrative costs of each Coalition
- What other states are doing – cultural engagement
- Conscious mentoring

#### Clarification

- Need OCT guidelines
- Expectations from CT to Coalitions to be clarified
- Is \$ from surplus lands going in Corpus or not?
- \$200 million goal?
- Vision/direction
- Succession
- Organization is key...keep individual roles simple, groom volunteers
  - Rules of operation
  - Consistency of operations
- Maybe standardized forms needed
- Process around granting; maybe all counties should have 1 grants process?
- Need for continuity/memory...can't be all volunteer
- Concept of "member" is troubling
- Devote time to presentation of Trust
- Promote license plates

- Toot our horn – what Trust is, Coalitions are
- Get story out...what our \$ is doing in County
- Collaborations (Arts Commission, between counties)
- Keep meetings, events visible

#### Engagement/diversity

- Outreach to Tribes...Karen Quigley, Commission on Indian Affairs
- Everyone is busy
- Networking events
- Outreach/recruit young people (schools, under 40, youth) (x8)
- How to get a young person that can consistently be there
- Think of youth as older than teens
- Find recently graduated or Master's students
- Elders – benefits of getting elders more involved
- Who we target as membership
- Huge difference between generations
- Diversifying board (rural/urban)
- People don't feel ownership
  - Appreciate statewide perspective
  - Spanish-speaking communities
  - Oral community...where should we be going?
  - Events, ethnic-based
  - Teachers
  - Are we cultural ambassadors?
  - Soccer fields
  - Church
  - Radio
  - Zumba
  - Family walking
- Authentic relationships over time; How? Informal, engaging
- Maybe come in with a community art project
- Focus on commonalities
- Reinvigorating members you have
- Target artists, small area
- 3,000 Native people living in George
- Outreach
  - Go into schools
  - Confluence Project
- Maybe have annual regional gatherings
- Attracting projects in new media forms

- Maybe awards for outstanding projects
- Show me what's possible, giving access

### **What is Working?**

#### Education opportunities

- Grant workshops (Yamhill)...brought in new groups
- Public grant workshops and grant writing support
- Hand-holding/commitment to relationship building (East Portland example)
- Mentor/cultivate

#### Structural

- Lane moves their workshops around
- Benton has an LOI process
- Term limits
- Identifying tasks for all board members and volunteers
- Benton: strong chair
- Leadership connectedness, continuity, new members, governance
- Under county umbrella, fiscal agent
- New leadership
- Stable staffing
- Organization
- Succession
- Timeline: we spread around county
- Wasco: id'ed leadership w/ robust responsibilities – chair, treasurer, secretary
- Hood River: board highly skilled professionals, own 501(c)3, admin not a barrier
- Events happening because of our \$, or enhances them. Given credibility.
- Compartmental roles in our communities
- Grant process/administrator helped facilitate
- Simple grant application
- Staggering of term limits to ensure continuity of knowledge
- MC – term limits, roster awareness, co-chairs, continuity...admin support is paid...can focus on work not overhead
- CC – term limits, leadership structure, administrative staff support is paid, continuity/institutional memory/member handbook/orientation
- Leadership
  - Dedicated administrative staff
  - Vice-chair moves into chair position

- Binder of information – cultural partners, shows professionalism
- Working board – event planning, active solicitation

### Process

- Being flexible on who can apply
- When board member leaves, replaces him/herself within Community Development
- Lane recruits marketers to board
- Benton, Notebook of process/procedures (5 exec)/committees, timeline
- Grants to individuals but they don't have an organizational benefit
- New member orientation, welcome, importance of work
- Personal responsibility – take it all on, self-sufficient
- In-call...asking us for \$...changing schedule
- Gilliam: good grant dist process, advertised well, more applicants than grant recipients

### Communications/marketing

- Benton doubled # of LOI's this year: listserv plus flyers...mailed several times
- Lane promotes their grant awards and the activities – helps people/community recognize what they do as “cultural”
- How to do 21<sup>st</sup> century outreach – social media, Facebook, websites
- Grant cycle consistency plus regular advertising: newsletters, email, constant contact
- Meetings as needed
- Communication: email, w/OCT, fewer/more directed meetings
- Use of technology = communication via email
- State help for campaigns
- Value proposition for arts and culture
- Success storytelling
- Understanding of trust
- Media recognition/support
- Cultural plan more accessible/understandable
- Synopsis of Coalition
- Warm Springs: Grant writing training and reporting – increases awareness of grant opportunities and community capacity, outreach
- Harney County: Communicate well with public - local papers, website presence, face to face outreach, word of mouth sharing
- Grant: found grant partner through name recognition
- Advertising
  - Publicity from local paper...grants, awards



- Advertising – ad in newspaper (full-color of grantee achievements), year-long movie theater ad, press releases, about grant app availability
- Theatre ads – spreading word of grant availability
- Paid advertising
- Outreach advertising
- Nonprofits spread thing...small population base
- Maintaining mailing lists
- We ask for 30 seconds to pitch Coalition and Trust at Coalition-funded events. Trust provides a standard script.
- Washington Co does grantee celebration event
- Offers marketing resources: press release template, list of local media contacts
- Fund an online events calendar (current or hoped for?)

### Engagement

- L, Representation from different parts of County – assigned seat for E, W, N, S
  - Application process – turn away some
  - Clear grant application/priorities
  - Grant writing workshops
  - Lane Arts Council – staff – fiscal sponsor of Coalition – admin – grant reports
- Yamhill, get applicants
- Community outsourcing – i.e. paid contracts/internships
- Aim for diversity: leadership, outreach, discipline, geography
- Engagement improved
- Outreach, awareness, cultural teachers (cultural byways)
- Member participation/engagement
- Jefferson: 2 youth board members (increases youth engagement)
  - 2 youth board members: Sophomore, 3 year terms, outreach. School network promotes increased participation/applicants for funding
  - School network provides diversity of ideas, vision, perspectives
  - All volunteer proposal review Committee (separate from CC Board)
    - Outreach
    - Tapping local expertise
    - Recruitment for board
    - Greater geographic representation
- Involvement of non-members on grant panel
- County liaison (paid by County)...can it be replicated?

- Outreach representing unique County identity
- Invite other CC members (Yamhill, Wash, Mult)
- Multnomah – grant panel review – some on there to see if Cultural Coalition is a good fit for them
- Washington – awards ceremony, invite legislators
- Outreach
  - Networking
  - Grant app. workshops
  - Referral from current members
  - Annual time (March) to bring forward new members
  - Targeted areas (arts, geography, humanities, business)
  - Pull from applicants to create diversity
- Go to all events we fund...at least one member per (Wash Co “Buddy System”)
- Site visits/presentations of potential grantors
- Rewards
  - Grant-giving event to award grants including provide entertainment from awardees, community leaders
  - Did award one at Co. Commission board meeting
  - Funded artist in residence in museum
  - Cultural person of the year...get a ball cap and dinner at a local restaurant
  - Commissioned a piece of local art
  - Fred Field Fund at OCF to boost the giving
  - Award ceremony – celebration of grant awardees, summary and amount

### Collaboration

- Coalition goal focus
- Appreciation for Coalition volunteers
- Partner collaboration across sectors (gov’t, nonprofit, for-profit, arts, heritage, etc.)...e.g. paid ad space
- Share passion
- Each take on small bites – one thing do lots of little things – share that load –limited duration – even if asked person can’t commit – can be an advocate to others
- Impact from each Coalition’s history
- Being connectors in our community = a critical role = need more of them
- Settle for Plan B? Right sized...doing what’s best...community buy-in

### Strategy

- Winning hearts and minds
- Redundancy in our community, same 10 people doing 5 orgs
- Resources bleed to West
- Rugged Individualists – maximize/optimize it
- Challenge and Competition = motivate
- State should recognize and acknowledge in lieu of \$ what folks do
- WC – gatekeeping through County (members), independent board review, politics involved
- Cohesive approach based in values
- Looking at full county geography/cities
- Creating/using job description (member)
- Seats for members rep. arts, humanities, libraries, heritage, etc.
- Having County support
- Clack – review panel not from Clack Co.
- Reps from non-county orgs – takes out conflict of interest for Coalition members

#### Outreach/Marketing

- Events evenings
- Mailing list, e.g. legislators, tax preparers, etc.
- Presentations at Barnstormers, Rotaries, can share PowerPoint (Jo Co)
- Press releases via email
- Info at website
- Ask awardees to put logo on materials, in contracts
- Also catered an art show to reach parents...good way to reach parents
- Idea: Coalition member give short pitch at awardee finale event about the Trust and Coalition
- Public information – dissemination
- Website current and engaging
- Service organization. Amazon-Target-Fred Meyer
- On-line apps (good)
- Sponsorships
- County needs cultural plan
- Growth in electronic media
- S. or Visitors Association
  - Travel Oregon
- JoCo.net...Hyla's newsletter
- Leadership/Outreach
  - The Ford Family Foundation
  - Nonprofit Assoc of OR

- Website – JCCC
  - board members on it
  - grantees report
  - application downloadable
- Outlet for Ill. Valley (local artists)
  - word of mouth
  - social media
  - Trip Advisory

#### Fostering inclusion

- Simplify grant reporting to encourage more applications
- Grant-writing workshop – in combination with the Trust
- Travel around and provide technical assistance
- New members

#### Collaborations

- “More collaboration the better”...strength in connections
- Provide collaboration for arts and culture

#### Organization grant making

- Leadership
  - ? term limits
  - Broad spectrum of our community
  - Board participation
  - Administration streamlined
  - Recommendation to Trust
  - Reporting website bad
  - Succession:
    - Press releases include mention of needing members
    - Target professions that would be good, e.g. an accountant
    - Limit meeting to times when we need to meet
    - Look at gaps then recruit
- Application
  - Writable pdf; automatically goes to each board member
  - Scan a portion and email to members
  - Keep hard copy of proposals for 3 years

#### **What's Not Working?**

#### Accessibility/diversity

- Not having seats for broad representation (topic, geography, etc.)
- Struggle to have a fully diverse Coalition that represents County/community
- Coalitions act like agencies rather than local community grassroots organizations

#### Understanding/communications

- Making connections between trust, Coalitions, people/groups in the community, partners
- Cultivate understanding about CT, OCT guidelines, OAC Community Arts Development provides support (ABC grants, Oct 1 deadline: \$3-7,000)
- Communications with the community across Coalitions/partners (x3)
- Publicity needs improvement
- Plan for outreach
- Capacity for broad/diverse outreach
- Reporting
- Marketing
  - We need to ask out applicants and their constituents how they heard about us
  - Elevator speech comments
    - Challenging – explaining tax credit
    - Run an ad at theater
    - Conversation not pitch...away from fundraising to participation
    - Must have volunteer time investment
    - Little bit of \$ every year, leverage that locally

#### Leadership and outreach engagement (x3)

- Diversity needed
- Incorporating young people (x3) (see Jefferson example)
- Leadership, gatekeeping through County
- Board governance needs: guidelines, by-laws, recruiting (x2)
- Programming effects—evaluation tools/methods

#### **What are you Learning?**

#### Collaboration/partnerships (x2)

- Teamwork
- Build on strengths
- Patience and endurance re: workload
- Chunk the work
- Culture asset inventory!! Create and re-use over and over again.

- Connecting with larger/statewide/community events e.g. Cycle Oregon, other recreation opts
- We're often limited by ourselves
- From others' success stories
- Your cause/your story
- Cultural teachers
- Ability to network with other Coalitions on what they're doing and how – can work together
- Need to update plan to recruit new members
- How Coalitions work
- How we/Coalition facilitates use of funds...help grantees
- Connections with partnerships
- Coalition behaviors that are working
- Important to celebrate...bringing together local groups
- 100 women for...\$ distributed on the spot/bold
- Share
- Networking
- Learn more/Coalitions can support outreach beyond grants
- Strengthen local Coalition
- How to be a resource to Coalitions
- How 3 Coalitions can collaborate
- How OAC and community arts development can strengthen Coalition work
- How Heritage Commission can be supportive
- Develop relationships for the long-term
- Potential opportunities for OCT partners and CCC/Tribes to increase communication/collaboration
- Cultural buddies

#### Process

- Food – participation in gathering
- Training, support, publicity
- Mentoring applicants where needed
- Incentive Volunteer
- Admit Ignorance
- Start with easiest steps/fun
- Food – be generous and welcoming
- Grant awards recognition/ceremony
- Diversity
  - Broader recognition of who qualifies to apply for grants, communication

- Diversifying award base
- New ways to be accessible to new groups
- Our own cultures as groups – what parts of the envelope do we push
- Cultural agility
- Importance of youth leadership
- Who are families?
- Need to diversity leadership
- Make Coalitions reflective of diversity

### Inclusivity/engagement

- Hood River: face-to-face outreach most effective, flyers in community, cultural nonprofits help advertise OCT tax credit to reach donors
- Wasco: local media, county commissioners, city council, etc.
- How to welcome new people in community...welcome wagon
- One on one – ask people to join
- Find someone new...who do you know? Ask board members
- Outreach is not in-reach (show up!)
- Reach out
- Public outreach – paper, organizations (Lions), get on program, getting word out
- How can we bring in more members of community (as panelists)
- Confused culture with color...risk of tokenism
- Strategy will come to you once you make an authentic connection
- Be willing to be open to what you may not expect or want to hear
- Is challenging
  - Economic
  - Cultural
  - age and changing demographics
  - Responsive opportunity set-aside?
- How to extend reach within all of Multnomah County
- Go out physically. Don't invite people in, go to them.
- Book: *Building Communities, Not Audiences*
- How to bring fresh members on

### Organizational

- Not just a warm body but someone who wants to be a part of the mission...and then find their strengths
- Groom followers to become leaders...eventually you need to let go...know things will be done differently

- Coalition members need to do homework and get to know their Coalition story/history and what OCT has available to your Coalition
- Flexible with change, not stay stuck
  - Are we willing to have our orgs. Changed?
  - Understand and cope with limitations
- Board recruitment, how to apply for grants, leadership
- Recruitment, get to know people
- Difference between tax credit and deduction
- Learn more about Trust
- How to reach out, spread \$ wisely, rules
- Some CC strictly granting, others also programmatic
- But it is functioning: locally self-determining
- Small amount of \$, reporting
- Does size of OCT staff hamstring Cultural Coalitions?
- Better understanding of the Trust and its future
- How to get more \$ from Clackamas County into Trust
- Lay of land
- How other Coalitions operate
- How Trust connects with local Coalitions
- Having consistent administrative support to enable leadership

#### Communications

- Better use of technology to communicate
- Spend some time on the OCT website
  - Need repository on OCT website: all Coalition materials
  - Can never find anything on the OCT website...hard to find
- Know your story
- How to tell Trust story
- Y, new ways of communicating budget for targeted media
  - \$200 Pandora, Facebook, Google Ads, targeted ad, looking for members/grant application
- Clear how participation has larger impact/benefit to community
- Wear nametag to Cultural Coalition events/activities
- Marketing
  - Message
  - Pitch...legal...ethical
  - Pitch impact, full circle
  - How to reach individuals and organizations
- How others are re-writing goals, streamlining application
- OCT should clarify guidelines



- Track your in-kind contributions (\$22/hr volunteer time)
- Pop-up app from Trust to other cultural nonprofits...also give to OCT
- Hear from others, grow
- Increase awareness
  - Tips on how Coalition can get out word about Trust
  - Educate about Oregon Folklife Network
  - Wear your Trust sticker...THIS IS CULTURE
  - Gilliam: pool for outreach small, relevance/compelling; paid advertise in paper (grant app)
  - Need for increased community awareness of OCT and CCC/Tribal resources
  - Many ignorant about Coalition/Trust...need easy way to frame value to draw people in
  - CCC grants are the beginning for many organizations; leveraging gifts
  - Educate, socialize new members
  - Brought on board (e.g. Corliss)
  - Different ideas – art, museum, etc.–i.e. technology...meet people where they area

#### Miscellaneous

- Not much learning...state good...local not so
- I am not alone

#### Challenges

#### Engagement

- Maintain w/state level of CT
- Maintain interest among Coalition members
- “Membership” cultivation
- Build trust with community (familiarity with org/successes)
- Diversity
  - Seek diversity—out of comfort zone
  - Geographical representation
  - give different voices a chance to be heard
  - Cultural arm of County need more engagement at County/City level
  - Marketing techniques—applications
  - Getting money to diverse, different groups/projects/tribes
  - Diversity of board related to diversity of boards related to diversity of grants
  - Involving all cultural sectors

- Hood River: reaching Latino population
- Marketing
  - Wasco: lack of effective media...is it our job to gather media?
  - Desire: nice name badges to id CC members
  - Lack of awareness of tax credit
  - Lack of awareness of Cultural Coalitions, esp w/ CC in process of rebuilding
  - ALL SHARE: CHALLENGE OF MARKETING SUPPORT – SOCIAL MEDIA – OCT WEBLINKS TO COUNTY SITES
  - Getting word out
  - Developing audiences
  - Develop relationships
  - Meaningful applications
  - Communication diversity of preferred methods
  - Maintaining website/cultural calendar creation
  - Collecting data and sharing stories
  - Informing public
  - Press coverage weak, try library networks
- Recruitment
  - (Lane: try grantees)
  - Recruiting new board members
  - Hood River: individuals applying for grants hard to come by
- Orgs don't see their work as cultural programming
- Definitions of cultural activity
- Politics for board recruitment
- Need to designate position for board recruitment
- Visibility in community
- Public reporting on results/impacts of projects
- Cultural
- Communications between state and locals confusing

#### Accessibility

- Wasco: new audience hard to reach...has to be personal ask to solicit new grant applicants
- Getting info out to all potential grantees
- Encouraging new applicants
- Understanding the process (hand-holding)
- Understanding defn of culture/arts (define)
- IDing effective communication channels
- Grant writing skills/reporting skills

- Marketing—applicants, for classes, for events, newspaper ad for grant cycle, word of mouth, radio, social media, problem: time constraint, require Coalition name recognition, KWSO, website
- Not everyone has access to tech
- Rural vs. urban
- Lane County – driving in from rural
- Klamath: travel distances for workshops, and to bring resources to rural communities

#### Collaboration

- Getting applicants to work together – 2 museums
- Piggy back ideas
- “Culture” of Coalitions (e.g. meeting places/times) (lunch meetings/conf calls)
- Contacting and reaching out to organizations
- Incorporating those organizations into our activities

#### Organizational development

- Need for admin support when funds are prioritized for grants
- Board recruitment that is representative of community
- Board recruitment (in general)
- Depend on leadership in one person/transition?
- Share leadership
- Embrace change
- Term limits
- Coalition members
  - Geographic distribution—can’t represent geography
  - Succession to long-term members
  - Finding new Coalition members
- Arm twisting for leadership
- Liability issues
- Impact measurement: recognition of impact (x2)
- Creating grant guidelines for prospective grant applicants; grant writing technical assistance
- Organizations communicating information back to CC
- Absence of term limits/succession planning (being addressed)

#### Resources

- Limited time
- Human resources
  - Community partners

- Volunteers
  - Volunteers wear many hats, tapped out
  - Demographic of volunteers changing, less volunteers from part-time residents, etc
  - Ideas come...volunteers don't
- Funding priority Broad vs. Deep
- Stretches limited resources
- Funding, competition (within tribal group/council approval) or with other organizations
- Easy for scope to be large

#### Miscellaneous:

- Capacity vs. experience, individual vs. groups (x3)
- Outreach to balance awards
- Follow-through
- Meeting coalition goals and expectations

#### **Resources**

##### Space

- Storage
- For committee meetings
- City Offices (meeting)
- RCC (meeting, spaces)
- Structure/place, Lane Arts Council

##### Human

- Teachers
- Volunteers
- Board members who are leaders
- Coalition members (talented)
- Individual
- Josephine, 11
- Curry, 9
- Jackson, 12
- Grantees have a mentor
- Social capital
- Coalition members
- RACC expertise (i.e. technical/communication)
- County liaison
- Wasco: board, human capital

- Hood River: highly connected professionals on board, rely on social community network
- Fiscal agent providing adm support (x3)

#### Organizations

- Tribal Departments
- Schools
- Community service – high schools and colleges
- Museum
- Historical Society
- Chamber
- Professional and/or committee organizations
- Chamber of Commerce as info/comm hub (x2)
- Local organizations (ex: Library)
- Other Coalitions
- School Districts
- Other agencies and non-profits
- Croak Book/Alien Abduction (for leadership succession)
- Or Historical Society (fiscal)
- Klamath County Museum (fiscal)
- Meet/coordinate with other Coalitions
- Use existing cultural organizations/activities to recruit board members
- Structure/place, Lane Arts Council

#### Visibility

- Media
- Historic buildings/landmarks to visually share region's culture/heritage
- Fliers, listservs, press releases, coffee shop and campus postings, social media, resource fairs, farmers markets
- Arts Centers promote grants
- Newspaper (x2)

#### Financial

- Funding outside
- Tribal funds – administrative costs
- OCT \$

#### Miscellaneous:

- Collaboration across County lines
- PTO's – reach economic/ethnic/geographic diversity
- Include in attendance:

- Bob Reinhard, history faculty at WOU, 5039313887, reinhardtb@wou.edu
- Matias, matiax@netinsol.com

### **Lunch with Locals**

Each meeting had a lunch panel of local leaders telling their stories about leadership and outreach-engagement. Panelists were identified as local leaders from the local Cultural Coalition network, and carefully chosen to make sure they are people who could stimulate thinking about these key themes. Bios of panelists are listed in Appendix A of this report.

### **What struck you about leadership and outreach/engagement?**

#### Engagement

- Youth participation and elder
- Outreach means traveling to other communities, towns, orgs, people
- Networking and collaboration among Coalitions
- Communication success requires learning
- Setting aside pre-conceived notions
- Know your audience
- Seed planting, patient for bloom
- To legislators in Salem re: OCT/CCC support
- OCT publicity campaign
- Event toward/at the end of the grant cycle
- OCT could provide education or leadership
- Inclusion/empowerment
- Go outside yourself/make cold calls/be genuine – real – authentic
- Commitment to long-term outreach
- Leadership identity and potential seeing possibility in everyone
- Nurturing community strengths
- Deschutes is big (#pop. and activities) – Crook and Jefferson?
  - Think outside your group or County, be inclusive and collaborate on bigger projects when possible
  - Identify point people
- Empower skill sets
- Empowering community through grant funding
- Participation
  - Minimum?
  - Care and feeding of volunteers
- Ford Model

- Collaboration
- Calendar programs
- Reach out to colleges, universities
- Reach out to teacher organizations
- Find do-ers in the community
- Listen
- Events have a goal/purpose. Learn about organizations and allow them to network with each other...sharing of resources
- Individual, one-on-one relationships
- A sincere overture will be met with a sincere overture
- Don't assume...ask questions

### Diversity

- Promote membership on CCC that reflects diversity
- Be aware of need to consider diversity issues
- Making more spaces at the table for a diversity of people – representative of the population – inclusive
- Some Counties lack broad representation (youth, cultural, ethnic diversity, etc.)
  - Identify the groups you wish to include
  - Learn where to find the groups you wish
  - Be willing to think outside the “me” box...take a risk!
  - These 3 will help build loyalty and strength to the cause
  - Consider adding a youth leadership position and “elder” position
  - Attend more cultural events ourselves (e.g. “Colored Pencils” events)
  - Consider bringing programs to public spaces/parks and publicize Coalitions
  - Diverse families...diverse crowds...farmers markets...malls...sports events
  - Set specific demographic goals for Coalition makeup
  - Take advice and reach out to the right resources to make new connections with different demographic groups...relevancy tour...this is culture
  - Understand the cultural differences, respect those differences, engage in ways that are compelling to other cultures
  - Diversity in our “ecosystems”/Coalitions makes a healthier environment
  - Is our goal to attract more diverse grant applicants or to attract more donors to OCT? Or both?

### Organizational/strategy

- CCC Board assessment tool

- Require grantees to include CCC acknowledgement language and/or send letters
- Know whom you lobby, know your audience and where to reach them
- As Q, find out who is behind “event”, organizations, etc.
- Learn who will support your vision and goals and get them involved
- You can’t leave CC until you find your replacement
- Volunteer review panelists as succession strategy
- Value of marketing the projects you are funding (e.g. events, installations, exhibits in public spaces: community event to showcase projects)
- Definition of culture: arts, heritage, history, humanities (ideas and discourse), preservation
- Resources...knowing what they are/who
- Revisit grant-writing support
- Revisit points of entry to grants
- CCC provide grant deadlines to OCT partners (with link)
- Meetings if and who
  - Limited staff
  - Word of mouth
- Limits
  - New vs. continuity
  - Term (modified)
- Goals
  - Is there an OCT Strategic plan?
  - Know your goal and stick to it
  - Create a long-term plan based on your vision
  - Lip service is easy!
  - Stick to your goals, if you say you will do it, do it
  - Have/create realistic goals
  - Ask the hard questions!

### Leadership

- Culture: personal and shared
- Vision
- Endurance
- Persistence
- Confidence
- Willingness to shift direction
- Recognize strategic moments
- Fearlessness



- Recognizing audience needs (just because you want them doesn't mean they want you...yet)
- Extend personal invitations
- Igniting the passion. How to?
- Providing opportunities to share passion
- Educating public how culture matters
- Engaging the audience. Telling their story with respect.
- Reaching out with leadership from within to connect–(Pacific) to new communities
- Meet people where they are
- Reciprocity between you and group
- Clear expectations for new people (i.e. students)
- Active listening
- Grantor = convener
- Passionate
- Ask grantees to serve/volunteer
- Turn polarizing issue into opportunity
- Increase collaboration
- Creativity and ingenuity
- Dog and the bone = won't let go

#### Understanding/reflection

- Acknowledgement that grant giving and cultural support go hand in hand and feed each other
- Who are we as local Coalitions, Tribes?...identity
- Know your culture, who is your County?
- Each Coalition specific roles and responsibilities, policy and procedures, timeline, easy to step in to
- Are the CCC advocates or fundraisers to OCT?
  - (Clearer expectations?)
  - What does this mean/look like?
  - Provide toolkit
- Is there a strong enough case for support for OCT?
- Do we really know who our families are?
- What are you arrogant about?
- How do we make the Trust/Coalitions relevant? Staying relevant = survival.
- What is our goal? New members, new donors, new partners, etc.? Each area has own priority and messages
- The Coalitions/Trust have matured. Can we have a cohesive "identity" to market...show the value?

- Funding cuts in schools “bleed” other organizations
  - Continue to think of the Big Picture
  - Lobby for programs to maintain funding rather than filling gaps (w/ other temporary \$)
  - 120 NP in Ontario competing for \$

### **Actions, What’s Next, Next Steps**

#### Carpe Diem...recognizing opportunity

- Short-term is ok
- Updating plans
- Be courageous in expressing our passion
- Don't be discouraged if not shared...just move on...know you planted seed
- Get in the van

#### Engagement

- Make what we do more interesting for others and our board members (i.e. more social, more fun)
- Recruit young people – colleges, high schools, youth board members– connect with high schools, leadership council, youth leadership organizations (x3)
- Focus on youth
- Internships
- Let grantees tell their own story?
- CC member mentor corps
- Gather data to speak to impact locally, regionally, statewide
- Award night
- Coop Work Experience Students @ community college
- Figure out way to explain quickly tax credit
- Engaging by Building Buy-In...hands-on
- Need to create more stable base of orgs/funding/function
- Celebration and thanks and elevation of service
- OCF meet the funders model meeting
- Regional celebration, info sharing, with support and participation of state partners
- Outreach as response to community needs
- Importance of face-to-face networking
- Outreach to local gov't agencies/bodies (e.g. city council, county commissioners)

- Mentorship corp to facilitate connecting artists w/ grant opportunities (e.g. Gilliam CC grant assistance)
- How to reach out to individual artist?—Set one award/grant/proposal for a target (ex: Odell School)
- Broadening def of culture
- Brainstorm list of member prospects
- Consider “non-traditional” forms of arts, heritage, preservation, humanities (e.g. are robots art?)
- Grant award ceremonies
- Word of mouth
- Repost, social media
- How do we embrace arts, humanities in our community?
- Grassroots
- Wasco Co:
  - Get Coalition together
  - Brainstorm ideas
  - Mentor through application process

#### Foster inclusivity

- Diversity—reach deeper into community to get more diverse proposals/proponents
- Reach out to non-traditional groups
- Access = technology = projects that support the creation and presentation of meta data
- Spanish-speaking radio station...engagement w/ one
- Mentor artists through grant process
- Target artists
- Based on authentic relationships and what's available
- How to I.D. new community members and get them up to speed
- Make incorporating young people a goal
- Cultural person
- Broader representation
- Cultural person of the year
- Intentional inclusiveness in materials
- Priority for new apps: underserved
- Granting writing workshops
- Newbie trainings (video)
- Translate app in other languages (Spanish)

- More in-depth, immersion visits and OCT and partners to County Commissions so that County and Tribal Coalitions can convey success and challenges.
- Develop consistent cultural plans at the County Coalition/Tribal level
- Exchange/communicate plans among the County/Tribal organizations
- Real estate agents to reach out to newcomers
- Flexibility meeting: venues, time, locations
- Youth are inheriting this
  - so get on board now
  - succession planning
  - may have more time and energy
  - buy-in from parents, schools, etc.
  - connect to existing youth orgs/classes
- Need for standardized orientation and training for new Coalition members:
  - Webinar...or?
  - Certificate?

#### Organizational/strategy

- Create action list...internal
- Trust central office empowers County level Coalitions
- Centralized support required from state office, i.e. directory and other pieces
- Refresh goals periodically
- OCT led nonprofit development program
- Updating plans
- Planning can be reconfirmation of focus, reality check, accuracy, not always “new is better”, or change everything
- Nonprofit learning centers (Walla Walla WA)
- Constantly in need
- Duplicating successful examples (Community 101)
- Provide food @ Coalition meetings
- Easier than we think
  - Overcome habitual thinking
  - make a friend, no new skill
- Revisit population-based distribution formula for \$...guaranteed minimum
- More tech asst at county level
- Ask OCF or other foundation for \$ travel plus expertise for that to happen
- Find way to get prof. dev. Credit for service on Coalitions, boards
- Using relocation packages
- \$ funding formulas based on population...inflationary bump
- Experience as resource

- Leadership is knowing limitations, seeking other's strengths
- Performing inventory of Coalition member strengths/skills/connections

#### Communications/education

- Technical resources around grant components/terms/budgets; grant writing workshops (e.g. glossary of terms)
- Visibility/awareness
- Get contact list from today out to all
- Review/revise Coalition plan (regularly)
- Think small/focused when choosing a target
  - Fundraising
  - Audience
  - Location
- Messaging
  - Every dollar counts
  - Culture is us. Everyday lives
- How do we make "culture" relevant?
- More help to potential grantees
- Convene artists where they live
  - Have you heard?
  - What are obstacles?
  - How can we help?
- Better reporting
- Overcome generational divide re: social media and communicating information
- What's working/not
- OCT – get word out...what tax credit is, how works
- OCT Training – what is purpose/mission/baseline
  - Clear picture of what "it is"
  - How to be an advocate
  - Coalition vs. OCT 1<sup>st</sup>
- Seek answers/guidelines from OCT – more clarity on basic Cultural Coalitions protocol
- Increase awareness and donation to OCT – serve as ambassadors
- Request better tech for on-line grant reporting from OCT
- Marketing
  - OCT website: list County/Tribal deadlines
  - Oct 1-8 Days of Culture
  - Go to websites
  - Event calendar...external

- Create a marketing plan/PR
- Use local leaders/resources to help tell your story
- E.g. radio "culture minute" pitch program ideas
- Contact list of CC members
- Investigate and implement all sorts of communication media, methods and language...Can OCT provide training?
- Set-up ways to communicate inwardly and outwardly
- Presence on website
- FB page
- Twitter account
- Instagram
- CC online forum/resource pages
- Practice an elevator speech
- Stories on Trust website
- Email list
- Agility YouTube links
- More spread the word groups
- Power points from Trust
- Elevator stores (video)
- Polk wants from OCT
  - Marketing and advertising support OCT
  - Centralized communication
- OCT – create a consistent image/ID
- Visibility – show the word you are doing
  - logo
  - tag line...could be statewide with local identifier
- One person...one invitation
- Repository for Trust website:
  - Plans
  - Apps
  - Criteria
  - Forms
  - Report template
- Use technology – more than one email address on roster please share everything
- Pendleton Connect...on-line database

#### Partnerships/Collaborations (x4)

- No next meeting?
- Joint meeting between Cultural Commission and Tribal Commission

- OCT and Cultural Coalition and cultural partner grant calendar/matrix that folks can share
- Relationship-building
- Create cultural asset list and share
- Collaborate more with fellow Coalitions
- Sharing successes with other Coalitions (plain as the nose on your face)
- Go to them and pitch Trust
- At least once a year meeting of 3 County Coalitions
- Co-marketing/PATA
- Asset inventory (both individual and community)
- Annual multi-Coalition gatherings: regional (next April)
- Partners
- Coalitions can act as hosts and cultural organization networking facilitators
- Listen, what others are doing
- Connect with other counties/communities about grant-giving works
- Networking
- Strategy: Follow each of us around
- Raising money
  - License plate
  - New definition of endowment...invest in people
- Polk Co. wants more direction from OCT:
  - examples of structure
  - options
  - top down instructions
  - centralized communication
  - specifics
  - roles
  - examples
  - marketing and advertising support
- Sharing failures (not just successes)
- Sharing network of recorded webinars for Coalition access
  - More networking more often
  - Tools/media kit
  - Shared website
- Annual event like this to exchange learning
- Share best practices from these meetings
  - Applications
  - Leverage, etc.
- How to consolidate or collaborate more among culture orgs
- Support each other – not win/lose “with” challenge grants

- Network? Starts today
- Statewide = each Coalition case history
- Use technology – more than one email address on roster please share everything



**Appendix D**  
**Agenda and Key Notes Provided at each Gathering**



**2014 Regional Gatherings:  
County and Tribal Cultural Coalitions**

October 11, 2014

Mid-Willamette Gathering

Yamhill, Polk, Marion, Linn, Benton, Lane County

and Confederated Tribes of Grand Ronde Cultural Coalitions

9:00 a.m. – 3:00 p.m.

Independence Events Center, 555 South Main Street, Independence

Many thanks to the five Oregon Cultural Trust statewide partners who have funded these gatherings through their annual Cultural Trust allocation:

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

Through these gatherings we are working toward the following goals:

- Stronger relationships and communication across coalitions
- Better informed coalition membership about the Trust and the roles of coalitions
- Strategies for engaging a wider range of citizens with local coalitions
- Advanced thinking about collaborations and leadership succession

**Agenda**

---

9:00-10:00	Breakfast, meet and greet
10:00-10:05	Welcome, review agenda and ground rules
10:05-10:30	Introductions
10:30-11:00	Review key talking points and questions
11:00-11:45	Small group work around leadership, outreach/engagement
11:45-12:00	Get lunch

12:00-1:15	Lunch with locals panel on leadership and outreach/engagement
1:15-1:30	Break
1:30-2:00	Small group work: leadership, outreach/engagement
2:00-2:30	Small groups report out, share strategies and ideas
2:30-3:00	Wrap-up

### **What have we learned through developing these gatherings?**

#### **Why focus on leadership and outreach/engagement?**

The Cultural Coalitions are doing exceptionally good work; volunteers (and a few paid staff) across Oregon are working hard and supporting local culture through their service. Coalitions have consistently asked to come together, get to know one another, and share what's working and what's not. This gathering is an important step toward those ends. Thank you for participating.

Coalition leadership across the state identified leadership and outreach/engagement as topics that all coalitions must address. By leadership we mean how to provide direction, grow and sustain coalition membership and ensure the success of local Coalitions. Outreach/engagement means that Coalitions are visible, accessible, and actively building relationships to equitably serve those in your County or Tribe(s). These themes are closely related. To remain healthy, Coalitions must consistently reach out to identify and grow new members that represent the County or Tribe(s) and serve all sectors and cultural groups in their region. Reaching youth and younger families is also central to outreach and leadership development; leadership succession (ensuring leadership continuity) is also key.

We are documenting the seven Cultural Coalition regional gatherings and will know considerably more about what's working, what the struggles are, and where to find the leadership and outreach resources. We are eager to share this information with all of you after the gatherings.

#### **Roles and responsibilities of the Trust (in relation to the Coalitions):**

- 1) Provide clear program guidelines and reporting procedures
- 2) Support development of cultural plans
- 3) Award funds
- 4) Facilitate information sharing between coalitions, provide technical assistance

## **Roles and Responsibilities of Coalitions**

### **Cultural Coalitions and their members:**

- 1) Identify local priorities in a cultural plan.
- 2) Re-grant funds from the Oregon Cultural Trust based on that plan.
- 3) Serve as local ambassadors for the Oregon Cultural Trust. As the grassroots tellers of the Trust message you are expected to advocate for the Trust. This means, at a minimum, understanding how people donating to local cultural organizations should also be donating an equal amount to the Trust.
- 4) Some Coalitions serve other functions for their communities and Tribes. Additional functions are not required by the Trust but certainly benefit their communities. In Lincoln County the Coalition provides grant-writing workshops, Yamhill County organizes an annual event to announce their awards and provides an opportunity for the community to hear about the awarded projects, and Josephine County hosts the Oregon Humanities conversations.
- 5) Coalitions are not required to raise additional funds for re-granting, but some do. For instance, Sherman County matches Trust dollars with local dollars from the wind industry and Yamhill County organizes an annual giving campaign.

### **Structures of Coalitions**

All coalitions must operate within a 501(c)(3) private non-profit organization or a public agency (such as County government or a federally-recognized Tribe). Most cultural coalitions are housed within an umbrella 501 (c)(3) organization, but a few are within County or Tribal government, and a few have stand-alone 501(c)(3) status.

### **Grant making**

There are a variety of ways in which Coalitions make grant awards. The key is to operate within the priorities of the Coalition's local plan. As mentioned, some Coalitions use the grant announcements as an opportunity to build community awareness and engagement through a celebratory event when announcing awards (dinners, awards ceremonies, and planning meetings).



Business Oregon houses the Oregon Arts Commission and the Oregon Cultural Trust in recognition of the expanding role the arts and culture play in the broader social, economic and educational arenas of Oregon communities. The Oregon Arts Commission and the Oregon Cultural Trust administer both federal and state investments in arts and culture.

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.

# Oregon Cultural Trust

## **Appendix E**

### **History of the Oregon Cultural Trust**

The Oregon Cultural Trust's mission is to lead in building an environment in which cultural organizations are sustained and valued as a core part of Oregon's vibrant communities and economy.

For 11 years, the Cultural Trust has played a vital role in building Oregon communities. Simultaneously, the Trust has built a permanent fund, now over \$20 million and growing, so that future generations may experience Oregon culture as we do today.

Through grant programs and encouraging philanthropy, the Cultural Trust helps fuel our economy, supporting cultural nonprofits that inspire our children, preserve our cultural treasures and foster Oregon's reputation as an incubator for new ideas. The Cultural Trust provides extensive support to rural areas and hard to reach places with the help of over 400 cultural coalition volunteers, of which you are a vital part!

All Oregonians can be part of this vision by supporting any of 1,300 eligible cultural nonprofits, matching those gifts with a gift to the Trust, and taking Oregon's generous and unique state cultural tax credit (up to \$500 per individual, \$1,000 per household and \$2,500 per Class-C corporation).

### **A Brief Timeline of the Oregon Cultural Trust**

- July 2001: Founded by the Oregon Legislature in a near unanimous vote on HB 2923 authorizing the cultural tax credit, cultural license plate and ability to transfer state assets to build the Cultural Trust.
- June 2002: Statewide cultural summit to begin designing Trust infrastructure.
- September 2002: Regional summits; 11 area groups hammered out the unprecedented structure of county and tribal cultural coalitions.
- December 1, 2002: The cultural tax credit, allowing donors to match a gift to participating cultural non-profits with a gift to the Trust, and then get the match back at tax time, went into effect
- December 31, 2002: In its first month, Oregonians donated \$1.5 million to the Trust.
- May, 2003: the Cultural Trust awarded its first round of grants, \$214,000.

- 2004-12: Donations and grant making continued to rise in all but one year.
- 2012: The Trust turned 10 years old and faced reauthorization of its exceptional tax credit. Oregonians of all kinds came out in support of the Trust and the credit.
- July 2013: The Oregon Legislature renewed the cultural tax credit for six years, until 2020, the maximum time possible, giving the Trust a vote of confidence to continue its good work. By that time, over 24,000 Oregonians had given to the Trust, which had, in turn, granted over 1,000 grants for \$14 million, and developed a permanent fund for culture of nearly \$20 million.

The Cultural Trust is **generous**, awarding over \$1.5 million a year in competitive grants to nonprofits across Oregon.

The Cultural Trust is **statewide**, supporting 42 county cultural and tribal coalitions with operations and annual grants, which the counties and tribes then sub-grant to local projects.

The Cultural Trust is **forward-thinking**, through its growing permanent fund, now over \$20 million, so future generations can experience the Oregon culture we enjoy today.

The Cultural Trust is **welcoming**. Anyone can be part of this vision by supporting any of 1,300 eligible cultural nonprofits, matching those gifts with a gift to the Trust, and taking Oregon's generous and unique state cultural tax credit.

The Cultural Trust is **money-smart**, providing leverage for 1,300+ nonprofits, whose donors can match with a gift to the Trust to access the tax credit.

The Cultural Trust is **results-driven**, making over 1,000 grants to cultural organizations across the state, \$14 million since 2003.

The Cultural Trust is **a partner for Oregon culture**, working with five statewide cultural partners: Oregon Arts Commission, Oregon State Historic Preservation Office, Oregon Humanities, Oregon Heritage Commission, Oregon Historical Society.

## **How it works**

*Donate, Match, Get the Whole Match Back!*

Support for any of Oregon's qualified cultural nonprofits makes a contributor eligible to receive a generous state cultural tax credit after making a matching gift

to the Cultural Trust, up to \$500 per individual, \$1,000 per married couple and \$2,500 per Class-C corporation.

**Appendix F**

**The Trust Future**

**VISION**

---

Oregonians sustaining, developing and participating in our arts, heritage and humanities.

**MISSION**

---

To lead in building an environment in which cultural organizations are sustained and valued as a core part of vibrant Oregon communities.

**GOALS**

1. Increase appreciation of Oregon's arts, heritage and humanities.
  - a. Build widespread understanding of the value and impact of culture to Oregonians.
  - b. Increase the relevance of culture by strengthening the brand (awareness and visibility) of the Cultural Trust.
  - c. Beginning with Trust leadership, develop statewide advocates for culture across Oregon.
2. Expand access to and participation in culture.
  - a. Support the growth and capacity of county coalitions, and nurture state, regional, and local partnerships, including public-private ventures, to strengthen and protect Oregon's 1,300 nonprofit cultural organizations.
  - b. Work with cultural partners collaboratively to maximize access to and support for culture statewide.
3. Improve support for Oregon's arts, heritage and humanities.
  - a. Steward the Trust as a protected fund for the State of Oregon.
  - b. Develop strategies for annual growth of giving to the Trust.
  - c. Increase public and private support for culture using incentives for the development of new funds and resources.



- d. Address and support significant opportunities to advance, preserve or stabilize cultural resources.
  - e. Work with cultural partners to support significant cultural legacy projects.
4. Increase grant making so Trust grants are of sufficient size to support major projects in all cultural disciplines and in all regions of the state.

## **Appendix G**

### **Succession (not *Cessation* or *Secession*) Planning for Small Rural Nonprofits** ***Jane Reid, Chair, Estacada Area Arts Commission***

Over the last 25 years, Estacada has been fertile ground for a number of small arts organizations. Folks found that if they had a compelling idea and the ability to convince at least four other people of its merit, creative things could happen here. And on a shoestring. It was this energy, grit and can-do spirit that formed the **Artback Artist Cooperative**, which just painted its 21<sup>th</sup> annual large outdoor mural. The **Estacada Summer Celebration**, an eclectic art and music festival in the heart of downtown. **The Spiral Gallery**, a cooperative with over 30 members. The **Performing Arts Group of Estacada**, a multigenerational theater group. **OrchEstraCada**, a multigenerational orchestra. The **Estacada Area Arts Commission**, which coordinates an arts and culture series, manages the public art process and convenes semi-annual art summits. And **Estacada Together**, which brought the Oregon Symphony to town, presents performances in our 850-seat auditorium, and is committed to quality arts education experiences for our students.

All these organizations are run by volunteers and all are grappling – at one level or another – with the question of how to carry on when the current leaders, often the original leaders, step down. This is what we are asking ourselves:

- Are there too many of us tapping the same leadership population? Should we be combining some of our organizations?
- How do we convince folks that they really are leaders, that leadership takes many forms?
- How do we reach out to a younger and more culturally diverse population that is overwhelmed by family and work commitments?
- How do we identify newcomers to town who might want to get involved?
- Do some organizations have a shelf life? How do we know when it's time to quit? (This is the Cessation Part.)

Many of us are participating in the Ford Family Foundation's *Ford Institute Leadership Program*, so we have learned about personality styles and effective meetings, organizational phases and project planning – we are ready to take our groups to the next level. Here are a few ideas of how we can identify, engage and recruit new leaders:

- Talk to parent groups at the schools – many of our current leaders started here. Find easy ways they can become initially involved.

- Be invitational and have FUN meetings. Share our excitement about how the arts can build strong communities.
- Reach out to new arrivals to town through the Chamber of Commerce.
- Convene another Art Summit in 2015 to share planning, look for collaborations and identify common challenges and opportunities.
- Create clear expectations for new members – entry-level duties, mentorships.
- Tap students as volunteers.

## **Appendix H**

### ***Succession Planning: bringing on new coalition members and rotating leadership***

Marlee Dutli, one of our coalition members, joined me for this teleconference. We really enjoyed listening to the conversations during the teleconference. I was sure that you could all hear me as I kept saying, "Hello, Kimberly, can you hear me"? I guess I would just say a few things.

In 2002 people were brought on board by appointment of the Crook County Court (original folks not on the coalition). Since then, we have had complete turn-overs of coalition members and a chair person who left town. From 2006-2008 there wasn't any coalition activity, so the OCT held the grant money. Our fiscal manager found out that our plan had to be updated. The old coalition members did not respond. A new coalition, through recruitment by our fiscal manager, was formed. New members have come and gone.

Currently, we need to add one more person to fill our 7-member coalition. A notice was placed in the paper (because we have that stated in our plan) and no one responded. So, as in most small towns, either you beat the bushes in search for new participants or recycle those who are always on other service committees and want to see their community flourish. We have a very supportive coalition, but rotation of chair has not gone well. We all sit in silence at a meeting, where the decision needs to be made until someone with great hesitation, says, "OK, I will". Coalition members serve for 3 years.

Flexibility and thinking outside the box, when it comes to meeting places and involving everyone on your coalition, is important. We usually meet at the library (again, stated in our plan that our meetings must be held in a public place for anyone who wants to attend). But, one of our members missed a lot of the meetings because of their business. So we moved a few of our meetings to their place of business (just happened to be an ice cream parlor). At a critical time when we were looking at grant applications, one of our members was out of the state and we really hold his thoughts and input in high regard. So, we had a teleconference with him so he could be included. To bring new people on board we also brainstorm who might be a good fit, then vote, then recruit. That seems to work.

Also, keep meetings short and as few as needed. Our plan says that we will meet 4 times a year. Last year we needed to revise our plan, so we met once a month for 6 months. No one seemed to mind. It had to be done. Half of our coalition members are retired or have very flexible work hours, so we meet from 12:00-1:30. Sometimes

the time stretches.

I guess my few words have also stretched. But as chair, I look at our coalition and ask "Why do we work"? Because of our common interest in our community, the arts and each other. We have all known one another for 30 years. We make it work.

- Claudia Callan, former chair, Crook County Cultural Coalition