

Code: IGDF
Adopted: 5/24/93
Readopted: 2/9/98
Orig. Code: 1313.2

DISTRICT FUND-RAISING ACTIVITIES

The district recognizes that fund-raising activities are important to the operation of selected districtwide educational programs and activities as well as the overall operation of a school. Therefore, the Board may grant permission to groups outside the district to provide funds to operate designated activities and programs. To be considered for inclusion in the district's budget plan, such activities and instructional programs must be authorized annually by the superintendent and provided in all schools in which they normally function. Activities and programs so authorized will be published yearly.

The superintendent is responsible for the establishment and implementation of fund-raising procedures that ensure that students have equal opportunity to participate in district activities and programs and are free from discriminatory practices. The district will determine the conditions of comprehensiveness and equality under which the activities and programs will be conducted. Applicable state and federal laws such as the Americans with Disabilities Act and Title IX implications will be included as criteria for making this determination.

To coordinate fund-raising activities, districtwide councils will be established for designated programs and/or activities. Each council will be made up of community members, school representatives and a district administrator. Minimally, council functions will include:

1. Raising the funds necessary to support the approved program beyond the district budgeted funds;
2. Communicating with other councils in order to coordinate fund-raising activities taking place and minimize the impact in the community.

The funds provided by the district council(s) may be maintained by the Beaverton Education Foundation as separate accounts for designated programs/activities. Upon authorization by the council, the funds will be released to the district and processed through normal district accounting procedures. A special fund will be established as part of the district's budgeting process with appropriations and expenditures approved by the Board. Existing administrative regulations and procedures will be utilized to operate the programs and/or activities.

The district will promulgate rules to govern council operations to provide consistency.

The specific procedures for fund-raising activities are described in Administrative Regulation IGDF-AR, District Fund-Raising Activities.

END OF POLICY

Legal References:

ORS 339.880

OAR 137-025-0020 et seq.
OAR 581-022-1660 (2)

DISTRICT FUND-RAISING ACTIVITIES

Fund-raising activities are important to the operation of selected district wide educational programs and activities as well as the overall operation of a school. They provide resources to conduct activities for students, purchase some supplies and equipment not provided for through the district operating budget, meet operating expenses of parent groups and booster clubs and related purposes such as activities by students, staff and/or parent/community groups. For these reasons they are authorized. It is equally important that the district administer fund-raising activities in such a way as to maintain an equitable balance of resources so that all district students have comparable educational opportunities. In order to provide for equity among programs and for an equal opportunity for student and community groups to participate in fund-raising activities, the following guidelines are established to regulate who should fund-raise and for what purpose.

DISTRICT-LEVEL FUND-RAISING

This administrative regulation provides further direction to implement Board Policy IGDF - Student Fund Raising Activities, which regulates the procedures for conducting fund-raising activities to support instructional programs and activities which have been reduced or deleted from the district's general fund. District-level fund raising may be used to support salaries, related personnel costs, basic equipment and/or supplies.

Instructional Programs and Activities Supported through Fund-Raising - Procedures

1. District wide activities and/or instructional programs which may be supported by fund-raising activities must be authorized by the superintendent or designee. Activities and programs so authorized will be published annually.
2. The district will determine the conditions of comprehensiveness and equality under which the activities and programs will be conducted. Applicable state and federal laws such as the Americans with Disabilities Act and Title IX will be included as criteria for making this determination. Approval will be based minimally on the following conditions:
 - a. Programs/activities provide for equal access for all district students;
 - b. Proposed programs/activities recognize the demand placed on the community by increased fund-raising activities;
 - c. Proposed programs reflect the district's desire to maintain a comprehensive educational program by submitting plans that provide for equity among programs;
 - d. The scope of the proposed program is within the norm of similar programs/activities governed by the Oregon School Activities Association and/or other school districts.
3. Fund-raising activities must adhere to the following requirements:
 - a. Students must never solicit materials alone; they must always work in pairs or with a group.

Collections must occur only during daylight hours. A responsible adult must be present and supervise such activities. No door-to-door solicitation of residences or businesses for funds or items for any purpose by students alone;

- b. Students cannot be placed in dangerous or compromising situations;
 - c. Fund raising cannot unfavorably impact other district programs or schools;
 - d. Activities must be appropriate to the philosophy and goals of the district;
 - e. Groups must follow established procedures or district policies related to fund-raising.
4. Participation fees will be required of all students for selected activities that occur outside of the school day. In order for all students to participate, community groups and individual schools are encouraged to establish funds for scholarships.
 5. The district will conduct an annual review of the guidelines and procedures governing fund raising as described in this administrative regulation. This review will determine the degree the regulation facilitates the district's efforts to incorporate fund raising in support of approved programs and/or activities. The review will be done in accordance with the district's budget time line.

SCHOOL-BASED FUND-RAISING

The district recognizes that fund-raising activities are important to the operation of a school. They may provide resources to conduct activities for students, purchase some supplies and equipment not provided for through the district operating budget, meet operating expenses of parent groups and booster clubs and related purposes. They also provide opportunities for parents, staff and students to join together in activities which develop rapport and build unity and enhance teamwork and the school's identity. In order to assist principals in administering fund-raising activities sponsored by site groups, the following procedures will be utilized:

1. All school-sponsored groups (French Club, National Honor Society, Odyssey of the Mind, Chess Club, etc.) and school-related groups (PTC, Booster Club, band parents, etc.) will submit a proposal to fund-raise. Each proposal will be reviewed by the principal and/or designee and will include the following:
 - a. Description of activity;
 - b. Rationale for the fund-raising;
 - c. Date, time, location;
 - d. Person(s) collecting and receipting money;
 - e. How money will be used.
2. Each principal and/or designee will be responsible for the following:
 - a. Coordinating all fund-raising activities within the school;
 - b. Establishing appropriate accounting controls;
 - c. Ensuring a safe environment for students to conduct fund-raising activities.
3. All groups must have written permission from the principal before any product is ordered or selling begins;
4. Principals may develop and disseminate individual school guidelines for fund-raising as necessary beyond these regulations.

All fund-raising activities District level and school-based must:

- a) show a need to fund designated programs/activities that have been reduced or eliminated through budget reductions;
- b) support the approved program beyond the district budgeted funds
- c) indicate a timeline for raising funds
- d) develop a criteria for disbursement of funds which is in accordance with federal and state laws including the Internal Revenue Code and state tax laws and district collective bargaining agreements
- e) be appropriate to the philosophy and goals of the district
- f) not impact other fund-raising activities.

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Portland Public Schools Foundation

a program of all hands raised



Parents in Portland Public Schools are doing amazing things! For over 17 years, the Portland Schools Foundation has engaged the community to meet the most urgent educational needs of our kids, by supporting the work of PPS Local Schools Foundations (LSFs), stewarding the funds raised by LSFs, and managing the PPS Equity Fund. This work will continue as our work expands as the managing partner of the Cradle to Career partnership in Portland and Multnomah County.

In 2011, PPS Local School Foundations raised a record \$3 million. Parents, principals, teachers and staff, and others in the 39 school communities that raised these funds, should be thanked. These funds are especially critical for the 2012-13 school year as Portland Public Schools faces the proposed cuts in response to our state's current economic challenges.

The numbers for the 2012-13 PPS Equity Grants are staggering - more than \$965,000 was awarded to 43 PPS schools, as well as five alternative programs. The PPS Equity Fund and Grants are based on an equity formula that takes into account key financial resources at schools, as well as the demographic profile of the schools. Once the equity formula is applied and a needs-based ranking emerges, the total amount of funds available is applied. This year the grants range from \$20,000 to \$30,000, with \$12,000 grants for five alternative schools.

Since 1994, on the heels of Measure 5's cuts to public education, PPS parents have created vibrant LSF's to raise funds to support teaching positions. Today that initiative has grown to 39 active local foundations. To date LSF's have raised roughly \$27 million for PPS schools, of which roughly \$8 million has been distributed through the PPS Equity Fund. This is amazing work that is also an incredible Portland story - having 1/3 of funds raised by local school foundation parent volunteers donated to the [PPS Equity Fund](#).

Resources

[Press Release for the 2012-2013 Equity Grants](#)

[List of 2012-2013 Equity Grant School Recipients with PPS Equity Grant Formula](#)

[List of 2012-2013 Equity Grant School Recipients with Full Ranking](#)

[2012-2013 Eligibility Form for Equity Grant School Recipients](#)

[Recent Article in Education Week](#) entitled Parent, Community Groups Pressed to Fill K-12 Budget Gaps (with mention of Portland)

[Portland metro school districts foundation information](#)

[PPS Local School Foundation Event Calendar](#)

[Having an Auction?](#)

[Frequently Asked Questions](#)

If you have any questions or if you are interested in setting up a foundation at your local school, please contact Samantha Lopez at samantha@thinkschools.org or 503.234.5404, ext. 13.

The Portland Schools Foundation is able to administer and steward gifts made to our local school foundations because of the generosity of New Seasons Market. New Seasons' [Cans for Kids](#) and [School Fruit](#) programs provide support for these activities.

Stay in the know with our e-news.

First Name:

Last Name:

* Email:

Organization:

*required

Who We Are. What We Do.

The Portland Schools Foundation (PSF) is an independent, community-based organization with the mission to mobilize resources, leadership, ideas, and public support to ensure a world-class public education for every child, in every school, in every Portland neighborhood. To do this, we:

- **Invest in teaching and learning** We provide venture capital to principals, teachers, and parents to accelerate academic achievement.
- **Mobilize the community** We marshal the talent and resources of parents, citizens, and businesses to strengthen every public school.

[READ MORE](#)

The Latest News

all hands raised



We are: All Hands Raised

On October 26, the Portland Schools Foundation (PSF) Board of Directors voted unanimously to rebrand the organization, including the change of the organization’s name from Portland Schools Foundation to All Hands Raised. For over 17 years, the Portland Schools Foundation has engaged the community to meet the most urgent educational needs of our kids, by supporting the work of PPS Local Schools Foundations (LSFs), stewarding the funds raised by LSFs, and managing the PPS Equity Fund. This work will continue, with the Portland Public Schools Foundation continuing as a program of All Hands Raised. [Read the full release now.](#) [Read CEO Dan Ryan’s e-mail to the community.](#)



U.S. Bank Announces \$120,000 Investment in Ninth Grade Counts

Yesterday, at the lunch celebrating and debriefing the 11th annual Principal for Almost a Day program, Malia Wasson, Oregon president of U.S. Bank, announced a \$120,000 investment in the Portland Schools Foundation’s (PSF) Ninth Grade Counts (NGC) partnership to the room of nearly 200 principals and community leaders. [Read the full release now.](#)

PSF Releases Guide to Education Programs for Out-of-School Youth

On any given day in Portland and Multnomah County, there are 3,000 high school-aged youth disconnected from school. Reconnecting these youth with education and a career path is crucial to the health, vitality, and economic well-being of our community. The Portland Schools Foundation, through generous support from the United Way of the Columbia-Willamette, has compiled the Guide to Education Programs for Out-of-School Youth. To receive a copy of the Guide in either Spanish or English send an e-mail to tedros@thinkschools.org.



Principal for Almost a Day Connects Schools and Community

On October 20th, over 100 leaders representing the public, private and nonprofit sectors will travel throughout Portland and Multnomah County to shadow a public school principal in one of five school districts (Centennial, David Douglas, Parkrose, Portland Public and Reynolds). Celebrating its 11th anniversary, the Portland Schools Foundation's annual Principal for Almost a Day event presented by Comcast, or "PFAD," focuses on creating public-private partnerships to help raise awareness and resources in support of local schools. [Read the full release.](#)

The PGE Foundation Makes Pioneering Investment in Cradle to Career Partnership

In late September, the Portland General Electric Foundation board voted unanimously to award \$50,000 to the Portland Schools Foundation to support the Cradle to Career (C2C) partnership PSF manages on behalf of the community. The Cradle to Career partnership is a public-private partnership that supports bold, data-driven system alignment along the education continuum. [Read the full release.](#)

Learn More About the Local Cradle to Career Partnership

The Portland Schools Foundation is developing a partnership to dramatically improve student success in Multnomah County. [Learn more about the Cradle to Career partnership.](#)

Pioneering Investors Fuel Expanding Work of Portland Schools Foundation

Recently, the Portland Schools Foundation (PSF) announced a \$100,000 investment by JPMorgan Chase for its expanding work around the Cradle to Career (C2C) partnership. Since that time, PSF has received a \$100,000 grant from the Bill & Melinda Gates Foundation, \$100,000 from the Portland Children's Levy and last week Portland City Council voted unanimously to invest \$235,000 in our work to improve outcomes for our children and youth. [Read the release.](#)

PSF Releases Guide to Education Programs for Out-of-School Youth

On any given day in Portland and Multnomah County, there are 3,000 high school-aged youth disconnected from school. Reconnecting these youth with education and a career path is crucial to the health, vitality, and economic well-being of our community. The Portland Schools Foundation, through generous support from the United Way of the Columbia-Willamette, has compiled the Guide to Education Programs for Out-of-School Youth. Access the Guide in English. Access the Guide in Spanish.

Almost 70% of Portland Public Schools are rated "exceptional" or "strong" by the state.

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The Portland Schools Foundation supports excellence, equity, and innovation in teaching and learning in Portland's public schools through its PPS Equity Fund, First Octave Fund for Art & Music, and other special grant programs. These grant programs help fill a need in our schools that would otherwise go unmet. On 2009 alone, the Portland Schools Foundation guided, managed, and channeled \$4.28 million into our city's classrooms.

PPS Equity Fund: Since PSFs inception, the PPS Local School Foundations and Equity Fund have been the bedrock of PSF's vision of ensuring a world-class education for every student in Portland. As outlined in PSF's original charter, 1/3 of those funds raised after the first \$10,000 go directly to schools without the parent base to raise funds independently, thereby working to bridge the existing equity divide. [Learn more about the PPS Equity Fund.](#) [Read the latest news.](#)

First Octave Fund for Art & Music: The Portland Schools Foundation First Octave Grants are designed to strengthen the quality of public education in the areas of art and music. These grants are available to schools in the Centennial, David Douglas, Parkrose, Portland Public, and Reynolds districts. [Learn more about First Octave Grants.](#)

Sponsored Innovative Grants: The Portland Schools Foundation works diligently to match the needs of schools with areas of funding that exist with corporate and funding partners. These grants may vary from year to year and are utilized to fund strategic initiatives throughout Portland's public school districts. [Click here for more information.](#)

For additional information on all of the Portland Schools Foundation grant programs, please contact Samantha López at samantha@thinkschools.org or 503-234-5404, ext. 13.

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1. What is the Portland Schools Foundation?

The Portland Schools Foundation (PSF) is an independent, community-based organization that mobilizes the resources, leadership, ideas, and the political support necessary to ensure a world-class public education for every child, in every school, in every Portland neighborhood.

2. Does our school have a local school foundation?

Yes. Under the non-profit "umbrella" of the Portland Schools Foundation, every school in the Portland Public School district already has a local school foundation account. Parents at many of these schools are actively fundraising for their local school foundation under the PSF's 501(c) 3 non-profit status.

Seven schools within the Portland Public School District have elected to establish their own non-profit local foundations, independent of PSF. PSF continues to work with these independent organizations to provide specific services, and continues to accept donations on behalf of those schools.

3. Why do schools raise funds through their local foundations?

As established by PPS School Board policy, local school foundations are the only way in which school communities and parents may raise funds to pay for personnel (FTE). All funds raised at local schools intended for personnel costs pass through the PSF and on to the school's account (called an "S0083 Account") at the Portland Public School district.

4. What is the one-third/two-thirds policy?

In 1994, the Portland Public School Board established a task force of parents and community members to look at the issue of schools raising private funds for teachers, other staff positions, and other basic "core" operations of a school. In the wake of Measure 5, many parents realized that teaching positions would be cut. Several schools established their own non-profit foundations to raise funds to buy back staff that had been cut. Unfortunately, not all schools have the financial capacity to raise significant funds toward hiring staff, so the potential for creating inequities across the district needed to be addressed.

The 1994/95 task force recommended the establishment of a citywide foundation and that one-third of the funds raised through local school foundations be given to this citywide foundation for the purpose of providing equity between schools. The Portland Schools Foundation was established, in part, to be that citywide foundation, and to route the other two-thirds to the school's account at PPS ("S0083 Account.")

In 1998, the Foundation recommended a change in the policy. Many low-income schools were not capable of raising more than a few thousand dollars each year and it seemed that equity was not being served by deducting one-third of those funds. A new procedure was put into place so that the one-third formula would be applied for each school only after the first \$10,000 had been raised each school year (July 1 - June 30). In other words, a school could raise up to \$10,000 total each year and receive 100% of those funds; anything above that \$10,000 "floor" would be subject to the one-third/two-thirds policy.

5. How does the Portland Schools Foundation use the one-third funds?

The Board of Directors of the Portland Schools Foundation honors its original charge from the PPS School Board by allocating 100% of the one-third funds (PPS Equity Funds) for direct grants to schools working to close the achievement and opportunity gap. The PSF does not use ANY of these funds for operations or staffing; those costs are paid by other fundraising activities.

The PPS Equity Fund is focused on increasing student academic achievement. Each year the PSF Board re-examines the specific criteria for each grant program to ensure that funds are being used as strategically as possible.

6. Our group of parents wants to raise funds for our school through the Portland Schools Foundation - are there any special papers that we need to fill out?

Because every school in the Portland Public Schools District already has a local school foundation under the umbrella of the Portland Schools Foundation, there are no special forms to fill out. Every year the PSF tries to have an accurate email list of parent contacts at every school. We encourage you to contact our office to make sure that we have the correct information for your school foundation contacts.

7. Does my local school foundation need to establish a board or committee?

No, the PSF recognizes that all schools have different levels of parent interest and capacity and does not require that a school have a specific type of leadership group for its local school foundation. However, to be successful at fundraising, you will need to form some kind of committee or team - no one person can fundraise alone!

Local school foundations that operate successfully make sure that the following conditions are met:

- The local school foundation has a good working relationship with the principal and mutual understanding of clear goals and objectives for the fundraising effort.

The foundation has good communications with the school leaders and community in establishing its funding priorities (many foundations poll parents regarding funding priorities in partnership with site councils, etc.)

The foundation has a simple fundraising plan that helps schedule the activities for the school year.

The most successful school foundation fundraising activities are based on:

Individual contributions from parents and families at the school.

One significant fundraising event per year.

8. What types of contributions can be made to a local school foundation or the Portland Schools Foundation?

Checks

American Express, MasterCard, or VISA (online @ www.thinkschools.org)

Monthly contributions through credit cards (online @ www.thinkschools.org)

Securities - Shares of stocks, bonds and mutual funds

- In-kind gifts

Wills, bequests, trusts

9. What are the steps the Portland Schools Foundation takes to process a contribution?

The Portland Schools Foundation sends a thank you letter and tax receipt to the donor.

The donor's gift information is added to the PSF database.

The donation is deposited into the PSF's bank account. The PSF calculates whether or not the \$10,000 floor has been reached and records the 2/3 of the gift be transferred to the school's account at PPS.

- After each monthly financial period is reconciled, a report is sent to PPS to PPS reflecting the amount raised at each school. The funds are then directly accessible to pay for personnel costs and are accessed by the school principal through the PPS District Finance Office.

10. How does a local school foundation find out how much is in its holding account?

Individual school foundations receive two types of reports:

The PSF will send two reports: These report will be sent monthly tot he school Principal the LSF Chair/Co-Charis and the LSF Treasurer.

- Monthly Donation & Expense Report: This report will include 1)A list of donors, the date and the amount of their contribution for the month, and 2) A detailed list of Expenses for the month.

Year to Date Statement: This report will include a year-to-date statement showing activity by month including deposits, expenses, amount contributed to the PPS Equity Fund and the amount available in your school's account at PPS.

11. What are the advantages to operating a local school foundation through the Portland Schools Foundation versus starting a separate non-profit?

The PSF provides a variety of services that allow schools to concentrate on fundraising rather than administrative and legal details. Included in the ways which the PSF assists school foundations are:

- Processing all gifts in accordance with IRS guidelines
- Legal liability rests with the PSF's board of directors, including an annual audit
- Maintaining a database of donors
- Providing technical assistance for fundraising activities, such as developing direct mail campaigns and holding major events
- Filing of the IRS 990 and State of Oregon Dept. of Justice CT-12
- Coverage under the PSF's general liability insurance
- Providing capability for online giving

Use of the PSF's mail permit

Processing of stock gifts through the PSF's brokerage account

12. Who can I call when I have questions?

Samantha López

Manager of Partner Programs

503.234.5404, ext. 13

Call for fundraising technical assistance.

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Your help provides the margin of excellence our schools need to ensure a first-rate education for every child, in every public school, in every Portland neighborhood. Thank you, donors!

The non-profit watchdog, [Charity Navigator](#), has again given the Portland Schools Foundation a four-star rating - their highest - because over 90% of every dollar raised goes to make a difference in our schools. Please be assured we will use your donation wisely.

Website: You can easily make a gift by clicking on our [donate](#) button.

Monthly Giving: Make ongoing [monthly gifts](#) to the Portland Schools Foundation or your local school foundation through automatic bank transfers (EFT) or automatic credit/debit card charges.

Workplace Giving and Corporate Matching Gifts: Many companies allow their employees to contribute through payroll deductions. Check with your human resources department. Corporate gifts are often matched by employers, so your donation goes twice as far. Click [here](#) to see if your company has a matching gifts program.

Appreciated Stocks or Mutual Funds: Contact our stockbroker Shelly McFarland with RBC Wealth Management at 503.833.5212, or by e-mail at shelly.m.mcfarland@rbc.com

Planned Gifts: Your gift will make a difference to future generations of Portland's children. To discuss the benefits of making a planned gift, please contact Terri Theisen at terri@thinkschools.org or 503.234.5404, ext. 32.

Non-cash donations: The Portland Schools Foundation now offers you the ability to turn unused items into a donation. Go to www.thecharitygroup.com and fill out an easy web donation form. Then place your donated item in the shipping box that the CharityGroup sends you and their shipping company will pick it up.

Phone: Call 503.234.5404 and have your Visa or MasterCard ready

Mail: Send a check or credit card information to:

Portland Schools Foundation
 2069 NE Hoyt Street
 Portland, Oregon 97232.

Many businesses help our students by giving a percentage of sales to the Schools Foundation. Please support the businesses that support us:

New Seasons Markets: If you purchase fruit with the School Fruit sticker, a portion of the proceeds comes to the Schools Foundation.

Stay in the know with our e-news.

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About The Foundation

The Foundation has a vision for today and the future that every child in the Lake Oswego School District receive a world-class education.

Because of the generous support of this community, we were able to raise over \$2.3 million last year. In the face of drastic state budget cuts, the District was able to maintain its low class sizes district-wide and to keep a diverse offering of electives at both high schools. The goal of the Foundation to maintain low student-teacher ratios has paid high dividends resulting in:

- outstanding student performance;
- high graduation rates;
- large percentage of college bound students;
- an "Excellent" rating by the State of Oregon on the State Report Card.

The Foundation conducts an annual campaign in the early spring of the year. It provides the greatest source of revenue. Other revenue sources are business programs, programs for realtors and mortgage lenders, corporate matching funds, direct mail and special events.

Our endowment program, The Stafford Society, has been established to provide sustaining funds for the Foundation.

Sustaining the Tradition of Outstanding Schools in Lake Oswego—

Since 1986, the Foundation has worked to provide additional funds to the Lake Oswego School District.

These funds are used *only* to hire additional classroom teachers which are the backbone of the district's outstanding success.

Get to Know Us Better—

These Foundation publications are available for download.



General Information Brochure



Endowment Brochure

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Lake Oswego School District FOUNDATION



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Help Us Celebrate
26 YEARS OF EXCELLENCE IN
EDUCATION!



Since 1986, the Lake Oswego School District Foundation, an independent, volunteer-run organization, has been instrumental in making the Lake Oswego School District one of the best school districts in the state. We do this by directing 95% of our donations to the District to fund teachers, keeping class sizes small.

Upcoming Events
<p>Don't forget to Answer the Call! Northside Phonathon Feb 27-29 Southside Phonathon March 5-8</p>

All funds raised by the Foundation are used to support teaching positions and reduce class size. Since 1993, generous donations from the Lake Oswego community have allowed the District to hire teachers to lower class sizes at the elementary level, and to increase elective offerings at the secondary level.

Last year's contributions helped us to:

- Keep our rating as the best multi-school district in Oregon for the 5th year in a row!
- Keep our class sizes reasonable
- Keep our Reading and Math specialists
- Keep elementary PE, Music and Art
- Keep our junior high and high school electives
- Keep our property values strong
- Give our children the very best education possible!

Watch parents, students, and community and business leaders explain why the Foundation is so critical to the success of our children and the livability of our community. Excellence has a price.

One of the most compelling reasons people choose to live in Lake Oswego is our outstanding public schools. In fact, for the past five years, every school in the district has received Oregon's highest rating. No other large district in Oregon can make that claim.

Last year, we did it!

Our mission has never been challenged as much as it was last year. With drastic cuts in the state budget, our District, like all Districts across the state, faced the prospect of a 5 million dollar budget gap. But our community stepped up to the challenge to help bridge the gap. More than 5,400 donors—parents, local businesses, and community members—together donated more than \$2.3 million to the Foundation. We are profoundly grateful for this support and generosity. This, together with a generous contribution from the city, helped us bridge the gap and avoid laying off teachers.

We thank our thousands of donors who helped us avoid catastrophe this year, and our dozens of volunteers who called, walked, and shared the story that helped our Foundation exceed its goals.

State budget challenges continue

But as you know, the District did not emerge unscathed. A school has been closed, and two more will be closed after this year. While this helps our funding situation, it doesn't make the transitions for the students and parents of those schools any easier. The District is still faced with several furlough days, days when no learning will take place in our schools. And after this year, the city's generous donation to our District will go away.

Help keep our schools the best in the state

Despite these challenges, the Foundation's work will go on because we have seen the results. Lake Oswego remains the only multi-school district in Oregon that has ever had all its schools receive the state's highest rating—and we have done it for five years in a row. Our goal this year is \$2.3 million, an amount that will let us maintain existing programs and class sizes and help our schools remain among the strongest in the state.

Students speak out.



sharingspree.com
is a fantastic fundraising program in partnership with the LOSD

Foundation. Sharing Spree offers fabulous daily deals (half-off or more!) with popular local businesses. It's easy, quick and FREE. Just click the logo to SIGN UP & SAVE.

	Follow us on Facebook
	Follow us on Twitter
	Link to the District's web site

If you gave for the first time last year, please consider continuing your gift. Our target is \$750 per student; if every parent gave at that level, we would meet our goal. However, any gift helps make a difference to our kids.

Join us

We invite you to join our efforts to help maintain the quality of our schools, and the quality of life we enjoy in our outstanding community.

Contributions to the Foundation are exempt from federal income tax under section 170c of the Internal Revenue Code.

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Frequently Asked Questions

What is the Lake Oswego School District Foundation?

The Foundation is an independent, non-profit corporation that was organized in 1986 to support the Lake Oswego schools.

In 1993, the scope of the Foundation was expanded to respond to reduced school funding and we determined that our primary focus would be improving the student-teacher ratio by providing funds to hire teachers, giving rise to our mission— "To Sustain the Tradition of Outstanding Schools in Lake Oswego"



Why do we need a Foundation?

When school funding was centralized in Salem in 1990, all districts lost the ability to set their own budgets and began to rely on the State government to allocate per pupil funding. The dollar amount provided is below what is needed to sustain the high quality of schools this community feels is appropriate, and far below what the community used to raise through property taxes. Eighty percent of the School District's budget pays salaries—less money means fewer teachers.

Twice in the last five years the voters of Lake Oswego have passed a Local Option to enhance per student funding. Another way to achieve that is to donate privately to the Foundation.

What is the Foundation's history?

Since 1997, the Foundation has provided yearly funding for at least 10 and as many as 33 teachers at all grade levels and in all schools. In 2010-2011 the Foundation raised more than \$2.3 million dollars, which added electives to both high schools as well as teachers throughout the district.

Where does the money go?

Ninety-four percent of all money donated to the Foundation goes to the Lake Oswego School District to cover teachers' salaries. Fundraising costs, such as printing, mailing and advertising are approximately six percent of the budget.

How much money has the Foundation raised?

The Foundation has raised nearly \$20 million since 1994. Last year, the Foundation raised \$2.3 million, and the previous year, \$1.4 million.

How does the Foundation raise money?

The Foundation conducts a school-based campaign beginning in February. Teams of parent volunteers in each school approach other parents, discuss the work of the Foundation and ask for their support. This is followed in April by the annual Phonathon. At this time, volunteers contact members of the larger Lake Oswego community by phone, explain the work of the Foundation, and ask for support. Other revenue sources are business programs, realtor and lender programs, [corporate matching funds](#), an [endowment fund](#), direct mail and special events. An additional opportunity to donate to the Foundation is provided by a year-end appeal, allowing supporters to maximize year-end tax advantages with their donation.

Can I see the Foundation's financial reports?

Yes. To access that information, please call Mary Puskas, the Foundation Director at (503) 534-2106 or email her at puskasm@loswego.k12.or.us

Who decides where my donation goes?

The Superintendent of Schools and the School Board make the specific decisions about how money is spent, based on a [Memorandum of Understanding](#) between the District and the Foundation. The volunteer Foundation Board does not make policy decisions.

Who is on the Board?

The Foundation Board consists of as many as 30 members—a cross-section of the community, representing education supporters with expertise in accounting, law, marketing, education and other fields. Many board members are also current parents of District students. Anyone may join the

Perspective—

Since 1990, the state has allocated per pupil funding. This amount is below what is needed to sustain the high quality of schools this community feels is appropriate, and far below what the community used to raise through property taxes. The current state funding gap is \$750 per child.

Foundation Dollars Make a Difference by Expanding Elective Classes!

Here's what some recent Lakeridge grads say—

"Hi Mr. Oakes,
Just wanted to let you know that I got my first Anatomy and Physiology exam back today and I scored in the top 6 of the 125 students in the class! So far so good."

—Emily Schoenheit

"I just wanted to let you know that I am changing my major from Biology to Human Physiology because I loved the subject so much in high school. I am taking an introductory level course this term, and everything we're covering is material we covered in your class! A couple weeks ago, we used sphygmomanometers and I was one of the only people in the class who knew how to use them, thanks to your class! I am really excited. Thank you for everything!"

—Laurie Fullmer

"Mr. Oakes,

I am currently studying to get my certification as a Wilderness EMT basic. I just wanted to let you know how much taking human physiology & anatomy last year has helped! I didn't realize how much I had learned until we started studying the heart in class. I really feel like part of the reason for my success thus far is because of your class. I just wanted to say thank you and I hope you are having a great year!"

—Kelcie Rosendahl

Board. A nominating and interview process is used in the final selection of new members, who serve up to four years.

How can I give?

The Foundation welcomes direct donations at any time. Payments can be made by check or credit card and it is possible to pay in monthly or quarterly instalments.

What are the giving categories?

There are several categories of giving ranging from Tutors, \$1-\$499 up to the Chairman's Circle, \$10,000 and above. For more information, please click the link to the [Levels of Support](#). All of our donors are acknowledged in the Foundation's fall newsletter.

Are donations tax-deductible? What is your Federal Tax ID number?

Contributions to the Foundation are exempt from federal income tax under section 170c of the Internal Revenue Code. Our Tax ID number is 94-3028590.

Can I give stocks or leave a gift in my will?

Yes. The Foundation's endowment fund, [The Stafford Society](#), is named for the late William Stafford, Oregon Poet Laureate, and Dorothy Stafford, who taught in Lake Oswego for 24 years. They exemplified the highest standards in education and generosity.

A gift to The Stafford Society or a bequest can be made in one's will, trust or retirement plan. Potential donors are encouraged to consult with their tax and legal advisors. This type of gift will ensure quality education for the students of Lake Oswego for years to come.

Can I earmark my donation for a specific school?

No. Donations to the Foundation are given to the District so that every student can share in the benefit of lowered class sizes.

What's in it for me?

Stronger schools mean a stronger community. If you have a student in the Lake Oswego Schools, you know that smaller classes and more class offerings are good for all. Even if you don't have a student in your home, you know that strong schools are one of the reasons that many of us live in Lake Oswego. A stronger school system will help your property retain its value. Well-educated students will serve us all as a society.

How can I get more information?

Please call the Foundation office at (503) 534-2106.

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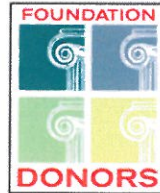


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**To Our Contributors, Thank you.
We couldn't have done it without you!**

Last year, 5,383 families, businesses and organizations made contributions to the Foundation. For the year ending June 30, 2011, these contributors and our more than 400 volunteers enabled the Foundation to fund thirty-three teachers in the Lake Oswego School District for the 2010-11 school year. We thank all of our supporters who joined in our mission to "Sustain the Tradition of Outstanding Schools in Lake Oswego."



Click the logo for a PDF of last year's donors.

The names on this list, are the donors from last years campaign and do not reflect those who have contributed after June 30. The list is compiled once a year in the fall to make sure that all pledges have been collected and that all donor names have been included.

Every effort is made to insure the accuracy of our donor list. If you or someone you know made a donation over the past year and they are not listed, or are incorrectly listed, please call the Foundation Director, Mary Puskas, at(503) 534-2106. We will make the necessary corrections as soon as possible.

OUR SPECIAL THANKS GOES TO:

These businesses and organizations that helped the Foundation get the message out about the financial difficulties facing the school district:

- Dan Heine and The Bank of Oswego for donating the marketing campaign as well as its significant financial support to the Foundation
- Brian Monihan and the *Lake Oswego Review* for its advertising support
- The Lake Oswego Chamber of Commerce for including the Foundation as a beneficiary of the annual dinner and auction
- The Lakewood Center for the Arts for its benefit performance on behalf of the Foundation
- The City of Lake Oswego for its ongoing support of our mission.

Two local businesses that helped propel the Foundation to recognition and acclaim on the Internet, from Facebook to YouTube:

- Jerry Brown Films: Jerry Brown, a local filmmaker and District parent, donated his time, creativity, and effort to direct, film, and produce our first-ever campaign video.
- Fan Page Generator: Jason Deitch, another District parent, offered the assistance of his company to create a custom landing page for our Facebook page.

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LOSDF uses the information we collect about you to be able to send you communications and to help administer and improve our web sites. Please note that we use this information for internal purposes only.

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LOSDF will not disclose any of your personally identifiable information, except when we have your permission or under special circumstances, such as when we believe in good faith that the law requires it. LOSDF may use such information ourselves to contact people for marketing purposes. We are aware of and sensitive to the issue of unsolicited email ("spam"); therefore LOSDF will never rent or sell your email address.

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The Stafford Society Endowment Fund



Sustained and stable school funding has become a necessary goal in today's education environment. Any forward thinking Oregon school district must look beyond budget cycles and the pressures of state funding and establish an independent financial base. The Stafford Society endowment program was created with this objective in mind.

The Stafford Society, the endowment fund of the Foundation, is named for the former Oregon Poet Laureate and writer, William Stafford and his wife Dorothy, a former Lake Oswego teacher. The Stafford Society maintains and invests donations to generate income for the Foundation. This income will fund teaching positions in the future and help ensure lower class sizes for students in Lake Oswego schools for generations to come. With this type of planned giving, the Foundation offers the community an opportunity to make a lasting gift to public education.



In order to create a sustained and meaningful income stream for the Foundation, the Stafford Society—currently in its infancy—needs to grow. Our goal is to build a \$100 million fund, capable of generating \$4 million per year for the Lake Oswego School district.

Fund Management Through the Oregon Community Foundation

To help manage such fund, the Foundation has partnered with the [Oregon Community Foundation](#) (OCF). The Oregon Community Foundation is a statewide nonprofit organization that administers permanent charitable funds established through gifts from individuals, families, businesses and other organizations. OCF currently administers over 1700 permanent funds with assets of approximately \$940 million.

By leveraging OCF's stewardship and long term investment program, our endowment fund will be maintained in perpetuity to provide a stable stream of income for the LOSD Foundation.

How to become a member of the Stafford Society:

Click the button to donate online using Visa, MasterCard, Discover or American Express It's quick, easy and secure. You can make a one-time donation or choose to donate monthly or quarterly.

Donate by phone: Please call the Lake Oswego School District Foundation, at (503) 534-2106. We would be happy to assist you and your legal advisor in creating your planned gift program.

There are many ways to structure your gift giving to the Stafford Society endowment program. Please [click here](#) for information on trusts, life income gifts, bequests, annuities, etc...

Types of Membership

Founding Members
 Everyone who contributes to the endowment fund is welcomed as a Stafford Society member. Special recognition as a Founding Member will be given to those who contribute during the Stafford Society's initial fund development period (through December 2013).

Charter Founding Members
 Members who make outright contributions valued at \$20,000 or more (at once, or over a 3 year period) or planned gifts of \$40,000 or more will receive special recognition as Charter Founding Members.

For more information, contact Foundation Director, Mary Puskas by email at puskasm@loswego.k12.or.us or call (503) 534-2106.

Benefits & Planned Giving Options

There are many ways to structure your gift giving to the Stafford Society endowment program. Here are quick links to more information:

Benefits of Membership

Stafford Society Options

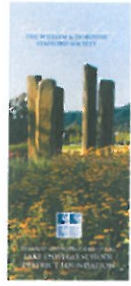
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- [Matching Challenge Gifts](#)
- [Endowed Teaching Position](#)

- [Donor Stories](#)
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To download a pdf of our Endowment brochure, please on the image to the right.





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Fundraising Tool Kit

Want to do something to help raise money for the Foundation but need some help getting started? Use the information in this Fund Raising Tool-Kit to get started. This page contains everything you need to create, plan and execute a successful fundraising event at your school or in the community.

FIVE STEPS TO A GREAT EVENT

Click on each step below to jump to the information.

- Step 1. Select Your Event:**
Starting suggestions for a fundraiser. Feel free to use one of these or make up something new
- Step 2. Plan Your Event:**
Tips for things to consider as you plan a fund raiser.
- Step 3. Promote Your Event:**
Ideas, templates and sample announcements to publicize your event.
- Step 4. Event Execution:**
Suggestions for monitoring progress to your plan, and for the actual event itself.
- Step 5. Follow-Up:**
Important advice regarding thanking your volunteers and sponsors, and about getting final publicity for your event.

If you need help or have any questions about how to maximize the success of your event, please email [Mary Puskas](#), LO Foundation Director, or call (503) 534-2106.

STEP ONE: Select Your Event

Below is a list of event suggestions, but feel free to be creative or ask around for successful ideas.

- For Parents**
 - Wine Tasting for Dummies**—Join with a local wine maker or distributor for an evening of learning about and tasting wine. The event can be scaled up based on the sophistication of your guests.
 - Morning Coffee**—Sell a cup of coffee & a home-baked treat to parents at the morning drop-off.

- School Focused**
 - Themed Bake Sales**— Pick a clever theme - hot pretzels if your principal is from NYC, crazy cupcakes or chocolate only.
 - Spaghetti or Pancake Feed**—Provide a simple-to-make meal for a small fee.
 - Yard Work Raffle**—Raffle off 3 hours of yard work by a crew of students or parents
 - School cookbook** Sell recipes from the school community for easy dinners, cookies or potluck dishes inexpensively copied and bound.
 - Student Art Show**— Display student art work in the school and invite parents and community members to admire the work. Ask teachers to

Resources for Creating a Great Fundraising Event

EVENT FLYERS
[Get a sample Flyer Here](#) or create your own!



LOGOS:

Click on one of the logos below. A larger version will open in a new window on your computer. To download the image, "right click" on the image and "Save Picture As" (PC) or "Save Image As" (Mac) to your computer.



FORMS TO PUBLICIZE YOUR EVENT
Click below to download the form.

- [Pre Event Information Form](#)
- [Post Event Information Form](#)

help and allow students to create art specifically for the show.

Movie Night—Show a popular movie, serve popcorn and soda

Family Dance— Turn the school gym into a sock hop for the family

Walk-a-thon / Read-a-thon / Math-a-thon—Donors sponsor student walkers/readers / mathematicians per lap/page/problem. Hold a public walking, reading, math problem event.

Fashionable Frugality

No Starbucks for a Week—Get a no-coffee pledge from parents (and high-school students) and a donation of the amount they would have spent.

Neighborhood Garage Sale—Organize a day of garage sales in your neighborhood Can & bottle recycling drive Gather a crew of students, and with parent chaperones, collect bottles and cans door to door and turn them in for deposit.

Can & Bottle Recycling Drive—Gather a crew of students, and with parent chaperones, collect bottles and cans door to door and turn them in for deposit.

Oregon Spirit

Rainy Day Fund—Ask for a pledge of a dollar for every day it rains in the month of March

Native Plant Sale—Enlist a local nursery or supplier to provide a select set of native plants at wholesale prices. Create order forms and get collect money prior to distribution. Especially good for Mother's Day.

In-Kind Donations

Donate your professional services like landscaping, dog sitting, hairstyling to the Foundation. We will advertise the service and proceeds from the sale go to the Foundation

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STEP 2: Plan Your Event

Organize a team to plan the event. Take into consideration time needed for each step, facilities, supplies, student involvement, volunteers, and funding needed for event purchases. Assign tasks and create a timeline. Some things to consider:

- **Space** - where can a fundraiser be held?
- **Staffing** - who can help plan or volunteer at this event? Do you have interested parents, teachers and community members?
- **Student Contribution** - can the students act as organizers and/or volunteers?
- **Scheduling** - how long will this take to plan and implement? What other upcoming events are scheduled by the school (e.g. parent-teacher conferences, science fairs, etc)? Should the event coincide with the date/time of another event or be scheduled for another time?
- **Audience** - who will be attending this event? Can we promote this event enough to ensure there will be good attendance?
- **Budget** - is there any cost to this event? How much money do you have for up front costs? Are you willing to solicit local businesses to provide materials or services at a discount?
- **Permissions** - are there permissions needed for using schools spaces, communications channels and student participation? A heads up is a good idea in any case.

Create a project plan with steps, due dates, and owners and share it with your event team, plus anyone else who's participation or cooperation is needed to make this event successful. Use it to get feedback and uncover potential "gotcha's" or problems with the plan.

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STEP 3: Promote Your Event

Get the word out about your event! You can never over-publicize an event - most people need to see or hear about it at least three times in order to register or internalize the activity and date.

Create an Event Flyer

Use the sample flyer in the yellow sidebar on the right or create your own!

- Hang them in your school— especially at the school entrance and at the pick-up and drop-off lines
- Hang them in businesses—See if the proprietor of your local dry cleaners, gym, grocery store or other local place of business will post them in their shop
- Put them in the school newsletter—Ask your school secretary or principal to include them in the weekly newsletter or email too.
- And finally, email a copy to [Mary Puskas](#), in the LO Foundation office, to include in a ListServ email.

Publicize Your Event

It is easy to get good publicity if you plan ahead. Use the [Pre Event Information Form](#) to capture the most important information about your event (e.g., who, what, when, where, why, how) and email it to the Foundation's Director, [Mary Puskas](#), at least three weeks ahead of time. She will work to ensure your event gets maximum publicity, including possible placement in the LO Review and LOSD ListServ emails.

You may wish to use above information to create a brief paragraph announcement about the event. Such a paragraph can easily be inserted into school newsletters or ListServ emails, etc. The more you can do to make it easy for others to publish your story, the better!

Here's a sample announcement that can easily be submitted to any of the above venues.

*Elementary Schools Planning a District-Wide
Read-a-Thon Fund Raiser*

On Friday, May 21st, students in all LO elementary schools will be participating in a two hour district-wide "Elementary School Read-a-Thon," designed to raise money for the LOSD Foundation, a non-profit organization whose sole purpose is to raise money to hire teachers. Between May 1-20, students will be asked to obtain pledges from family members and the community for every page they read during the two hour Read-a-Thon on May 21st. Teachers and librarians will ensure students are reading age-appropriate books and will be monitoring their reading during the Read-a-Thon. The elementary schools hope to raise at least \$20 per student, or over \$40,000 with this event. For more information, contact Mary Puskas of the LO Foundation at (503) 534-2106 or email puskasm@loswego.k12.or.us.

Logos

Download Foundation logos in the yellow sidebar on the right.

Click on one of the logos below. A larger version will open in a new window on your computer. To download the image, "right click" on the image and "Save Image As" to your computer.

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STEP 4: Event Execution

Monitor progress to your event plan. It's important to stay in touch with your volunteer team - either via email or periodic meetings if needed. Keep everyone involved and informed.

On the day of the event, arrive early with your team to deal with last minute questions. Make yourself available during the event, and be at least one of your volunteers is assigned to take photos.

Don't forget to have fun!

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STEP FIVE: Follow-up

Thank You's It's really important to thank everyone who helped make your event a success. For those in the district, email is an easy way to do this, and you can also include "thank you's" in your school's newsletter or principal's email (as appropriate). If you had outside sponsors, a hand written note is best; think about whether you can get a few students to express their thanks in a short note too, as notes from the students typically carry more meaning for sponsors and others who helped. Whatever you do, don't forget this critical step!

Post Publicity Let everyone know how the event went! People like to read about themselves, their school, or their community— especially if they played a role in a particular activity's success.

Within 1 week of your event, complete the [Post Event Information Form](#) to capture highlights from your event. Email both the Pre- and Post-Event Information forms to [Mary Puskas](#) as soon as you can after the event. Time is of the essence - the press won't print old news.

You should also write a brief summary of the event and submit it to your school's weekly newsletter and/or principal's email, and to the school and parent club websites. Here's a sample announcement:

Elementary Read-a-Thon a Huge Success

On Friday, May 21st, students in all LO elementary schools participated in a two hour district-wide "Elementary School Read-a-Thon," to raise money for the LOSD Foundation, a non-profit organization whose sole purpose is to raise money to hire teachers. Students came to the Read-a-Thon with pledges from families and friends for the number of age-appropriate pages of material they could read during the two hour Read-a-Thon. "Younger children typically were able to read three or four story books, while the older ones seemed to easily consume 50-75 pages," said Scott Lane, principal at Westridge Elementary. While it wasn't a competition, Forest Hills Elementary school raised the most money per student, averaging about \$35 in pledges per student. "This event far exceeded our expectations," said Mary Puskas, Director of the LO Foundation. "Our goal was \$40,000 across all elementary schools and the students were able to beat that by almost 20%, raising almost \$48,000. It is a phenomenal accomplishment for such young students.

Photo: Students at Lake Grove Elementary during Read-a-Thon

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Need Help? Have Questions? If you need help or have any questions about how to maximize the success of your event, please email [Mary Puskas](#), LO Foundation Director, or call (503) 534-2106.

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ABOUT US

Mission Statement: Power Learning Opportunities for Tigard Tualatin Students.

What We Do

We raise money to buy amazing things for students in the Tigard Tualatin School District. School budgets get cut every year, so we rally this wonderful community to fund programs, technology, books and supplies that make a difference for our kids. We grant money to teachers to pay for innovative programs. We support a health center to keep kids healthy. And we grant scholarships to our best and brightest as they take off for college.

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How We Help

- Granting thousands of dollars to each school every year to spend on their greatest needs. *(Foundation School Grants)*
- Giving Innovative Grant money to teachers who are teaching our kids in new and exciting ways. *(Innovative Grants)*
- Granting money for the visual and performing arts. *(Art in the Burbs Grants)*
- Supporting The Student Based Health Center to keep kids healthy and ready to learn, whether they have insurance or not.
- Granting more than \$13,000 in scholarships to the district's graduating seniors.

Contact Us

email:

info@the-fts.org

phone:

503.431.4024

fax:

503.431.4047

address:

6960 SW Sandburg St.

Tigard, OR 97223

Linda Kirschbaum
 Jan Kittelson
 Nancy Phillips
 Muriel Schelsky
 Philip Schmitt
 Dan Snyder
 Dana Terhune
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care &*

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Your portal for information about upcoming Foundation sponsored events.

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Events



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We fund three grant programs: Foundation School Grants, Innovative Grants and Art in the Bu

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