



Blue Heron Foundation
At Willamette View

Gratitude Report 2020

*Thank you
Donors!*

A Message of Gratitude

\$328,418*
Donated in
2020

*Total donations received
minus Pantry cost of
goods sold.

Dear Friends
and Supporters,

The Blue Heron Foundation At Willamette View is **your** connection to **your** community! This year, the response to COVID-19 demonstrated how quickly your donations could make an impact on everyone's safety.

But there is so much more! Our tag line is Building Community Together. In this report you will see examples of the new initiatives supported this year, including the launch of the Green Fund and the opening of The Sunflower Club. These initiatives all started from conversations with you, our residents!

Your donations were hard at work in the ongoing funds to support campus life, resident assistance and employee scholarships. Charitable gifts also reached outside Willamette View to make a difference in the community surrounding us.



Philanthropy has been a part of Willamette View since the very beginning, 66 years ago. It is an honor to steward the generous donations of our residents to the community you love.

With gratitude,

A handwritten signature in purple ink that reads "Loraine". The signature is fluid and cursive, written in a professional yet personal style.

Loraine Collacchi
Philanthropy Director

Blue Heron Foundation Funds

Heron Fund. Your gift to this unrestricted fund provides the most flexibility to support the evolving needs of our community. This fund has also been used to support COVID-19 expenses associated with masks and other protective gear, transportation to doctor appointments through Home Care and other related expenses. **The Heron Fund may also provide resident support.**

Good Neighbor Fund. Your support of this fund helps to provide assistance to residents in financial need, providing quality of life when one needs it the most.

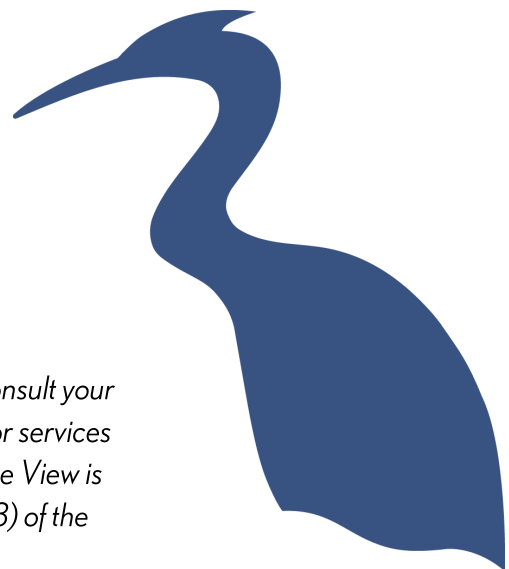
The Green Fund. Provides you with the opportunity to support a program that can provide funding for the implementation of sustainability projects and ideas to help save utility costs and reduce the carbon footprint of the organization and individual residents.

Employee Education & Development Fund. Provides a way for you to support an investment in the education of employees, resulting in a committed, motivated workforce, and better quality services. This fund includes the Alan Fibish Employee Scholarship Endowment.

Art of Living Well Fund. Allows you to direct your donation to specific programs and projects at Willamette View. Examples include artworks and Harmony Garden.

The Sunflower Club. Your gift will be used to help support a program that provides an individual with cognitive challenges a safe, compassionate place to spend structured time and provide relief for their caregiver.

Gifts are tax-deductible to the extent allowed by law. Consult your tax advisor as individual situations may vary. No goods or services were provided in exchange for a contribution. Willamette View is an exempt organization as described in Section 501(c)(3) of the Internal Revenue Code: EIN 93-0463816



Supporting Residents

Good Neighbor Fund

**\$219,905
Distributed
to Help 9
Residents***

Assistance from the Blue Heron Foundation tangibly demonstrates Willamette View's commitment, since 1955, in meeting the core tenet of our charitable charter, currently amplified by our mission, "To Inspire the Art of Living Well" and vision, "To Transform the Experience of Aging"!

This financial support allows Willamette View, Inc. operating divisions – Independent Living, Licensed Care and Home Care – to maintain a high-quality, safe and comfortable environment for all residents who choose to make Willamette View their home.

In 2020, the Blue Heron Foundation At Willamette View provided Resident Support to nine (9) residents in the amount of \$219,905 to cover costs related to room and board, Home Care, transportation to medical visits, medical and pharmaceutical charges, and rental of medical equipment.

*Reimbursed for 2019

Green Fund—The Newest Foundation Fund

In 2020, at the request of the Willamette View Green Team, the Blue Heron Foundation established a Green Fund. The purpose? To invite ideas to reduce utility costs and the carbon footprint of our community and support the implementation of sustainability projects.

Each time the fund balance reaches \$10,000, the Green Team will request project proposals from residents and staff. Proposals are reviewed by the Green Team and Willamette View Administration, then presented to the Blue Heron Foundation for financial support. **The balance of the Green Fund as of December 31, 2020, was \$10,390.**

**\$10,390
Donated
in 2020**

"I've advocated for energy conservation since I moved to Willamette View in 2013. I'm excited the Blue Heron Foundation joined that effort with its Green Fund to support energy saving projects to shrink Willamette View's carbon footprint and save money, too." **Mike Litt, Willamette View Resident**

Resident Activity Funding

In 2019, the Blue Heron Foundation Committee formed a workgroup tasked with shifting funding for Council-approved resident activities from Willamette View, Inc. operating support to philanthropic support.

As a result, in 2020 the Blue Heron Foundation awarded grants to cover costs for the Libraries—\$15,070 and Art in Public Areas—\$8,000 as well as a \$5,767 matching grant for donations received from Garden Committee plant sales, Movies, Music, MusicWorks, Public Affairs and Vespers.

Distributed in 2020



*Reimbursed for 2019

Professional Referral Services Program

The Blue Heron Foundation At Willamette View offers a Professional Service Referral Program. The professionals included in the program help residents with many aspects of their lives, including:

- Accounting and bill paying
- Tax preparation
- Investing
- Estate planning and plan updating
- Trust services
- Professional fiduciaries and guardians

Helping Our Local Community

Reaching out to support our local community is important to both residents and staff at Willamette View.

Start Right Program

The Start Right Program is a partnership of area churches and the Oregon Department of Human Services.

The program provides school supplies and backpacks to local children of low-income families and children in foster care – grades K–12 throughout Clackamas County.

In 2020, Start Right helped over 1,550 children.

\$3,300
Distributed to
Help Children
in Need

“Supporting the Start Right program teaches young people that others care about them, that they can do it. First day of school some kids have supplies, some do not. Teachers and principals know who needs things and connect with Start Right.”

Betsy Packer,
Willamette View Resident
and Start Right Volunteer



The Sunflower Club

The Sunflower Club Adult Day Program opened October 5, 2020, with a ribbon cutting ceremony and open house.

Based on a socialization model, this program, supervised by two full-time and trained Life Enrichment staff, provides stimulating and nurturing care that includes guided activities, art, music and movement. The Sunflower Club *inspires the art of living well* by providing an individual with cognitive challenges or memory loss a safe, compassionate place to spend structured time; and relief for their caregiver.

Donations to the Blue Heron Foundation support Memory Care in our community.

Your gifts made it possible to sponsor The Sunflower Club Adult Day Program at Willamette View in the amount of \$75,000 over two years.

Thank you!

"It is something to look forward to."

Sunflower Club Participant

"The Sunflower Club is a great activity program for the residents of Willamette View. My spouse did not like going at the beginning but after I encouraged him, it grew on him and now he likes it. He really enjoys the music activities."

Sunflower Club Participant's Spouse



**\$75,000
Sponsorship
Over 2 Years**

Building Community Together



**FLIR EST
Camera
Priceless!**

FLIR Thermal Imaging

To support Willamette View's comprehensive COVID-19 screening program for residents, staff, contractors and essential visitors, a donation to the Blue Heron Foundation secured a FLIR EST thermal camera to identify elevated skin temperatures. FLIR EST uses the same technology deployed at General Motors and The Pentagon.

Willamette View's use of this technology was featured on KGW and KOIN TV news, along with various newspapers and online local and national news media.



COVID-19 Response

"I am very familiar with the FLIR infrared imaging technology being shared with Willamette View. As a professor of physics at Wayne State University I used many of their cameras to do research. Here at Willamette View, the... ease of observation and sensitivity to small changes in temperature... make it possible to quickly scan and survey both residents and visitors for possible COVID-19 infection. WV's COVID policy is to screen visitors and vendors upon entry to our campus; FLIR technology is an important development that makes it possible as well as in screening our resident population on a regular basis."

Bob Thomas, Willamette View Resident



Medical Appointments for 343 Residents

Your gifts helped support costs for more than 645 trips to medical appointments for 343 residents.

"Coinciding events sometimes lead to fortuitous solutions. . . Our health went downhill about the time COVID-19 caused the suspension of WV's shuttle service.

Without a car anymore, how were we to get to all our doctor appointments? It was then we discovered that WV Home Care would give us rides to Kaiser, courtesy of the Blue Heron Foundation. So, when the most recent check from the U.S. government came, it prompted a visit to our Foundation to turn it over to them – a substantial portion to be deposited to their COVID Relief fund. Thank You!"

An Anonymous Resident

To support residents' efforts to show their appreciation for staff during this unprecedented pandemic, the Blue Heron Foundation provided a "flock" of 100 flamingos that landed on our lawns – with special "thank you" signs.

You helped our community through a very challenging time. Thank you for your generosity!

Flamingos!





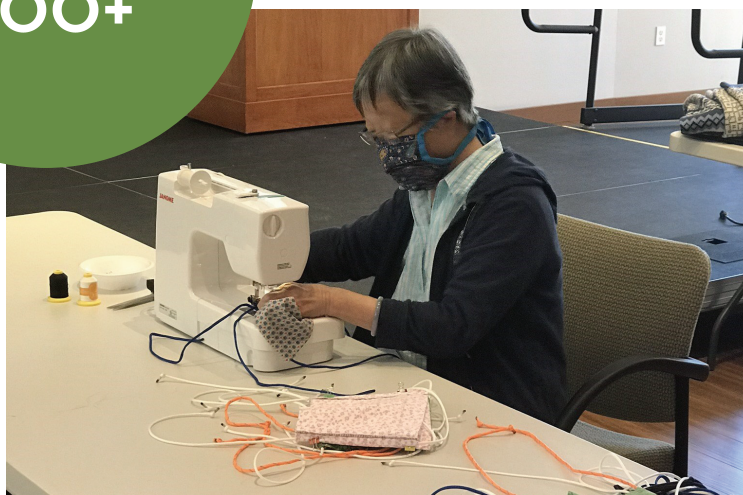
**EXTECH
Thermometers
Purchased
\$1,500**



To help keep your community safe, you made it possible to purchase 10 high quality, no contact infrared thermometers for screening areas around the campus and 6-foot spacing poles to help with social distancing.

You also provided community volunteers with supplies to make 900+ masks that were distributed to residents and staff.

**Masks
900+**





2
iPads
Purchased

Your generosity bought two new iPads for the Health Center Resident Care Managers (RNs) to help residents stay in touch with their family members and have Telehealth appointments with their doctors.

"The iPads have been a saving grace during the pandemic. They kept Willamette View residents connected with loved ones via Zoom, Facetime or Skype. The iPads allowed us to meet the needs of our residents by allowing nursing staff to support them with virtual doctors' visits.

Having the ability to provide virtual visits assisted in keeping residents and staff safe."

Cyndy Carpenter RN, BSN

COVID-19 Response

\$25,526
Cash and In-kind
Donations from
Residents and
Families

Your gifts to the Employee Education and Development Fund, along with a partnership with the Oregon Community Foundation and Clackamas Community College, made it possible to award \$9,412 in scholarships to four employees in 2020.

Thank you for supporting an investment in the education of our employees. This results in a committed and motivated workforce. We congratulate the 2020 award recipients!

Scholarships for Employees



Yuansong Ge, CNA in the Health Center, received a **\$3,000** Marion A. Lindeman College Bound Scholarship in June to pay for his nursing program at Clackamas Community College.

**Yuansong, \$3,000
and
Raylee, \$1,412**



Raylee Dixon, Health Center Caregiver, received a **\$1,412** Marion A. Lindeman CNA Scholarship to pay for her classes and books at Clackamas Community College.



Kendoll Tuthill, CNA in the Health Center, received a **\$2,000** Alan Fibish Memorial Scholarship to help pay for her nursing program prerequisites at Clackamas Community College.

**Kendoll, \$2,000
and
Cynthia, \$3,000**

"Dear Willamette View Retirement Community,

I am working on my prerequisite courses to apply for entrance into a nursing program in 2022. Currently, I am starting my journey into the science educations required by the programs. By Willamette View's grant, I will be able to shift my focus onto my academic goals, and not have the fear of affording the materials I need.

I'm thankful for the generosity your community has given to me once again. Working with Willamette View has had such positive impacts physically, mentally, and emotionally in my life, and I look forward to my future educational goals as well as my future with Willamette View."

Sincerely,

**Kendoll Tuthill, Health Center CNA
2020 Alan Fibish Scholarship Recipient**

Cynthia Boldt, CNA in the Health Center, received a **\$3,000** Marion A. Lindeman College Bound Scholarship to pay for her nursing program at Mt. Hood Community College.



2020 Financials

Blue Heron Foundation At Willamette View

Funds Held by Blue Heron Foundation		As of December 31, 2020	
Riverview Capital Fund		\$229,419	
Memory Care Support Fund		\$416,913	
Art of Living Well Fund		\$101,539	
Good Neighbor Fund		\$57,961	
Green Fund		\$10,390	
Heron Fund		\$441,117	
Resident Community Stores Fund		\$16,759	
Employee Education Fund		\$30,612	\$1,304,710
Funds Held by Others			
Funds Held by Clackamas Community College Foundation		\$90,000	
Funds Held by The Oregon Community Foundation		\$30,710	\$120,710
In-kind Donations			
Vehicles		\$28,000	
Artwork and Collectibles		\$14,000	\$42,000

Total Funds
\$1,467,420

Ways to Give

Cash, check or credit card

Gifts of securities (you may avoid capital gains on appreciated assets)

Donate a portion of your refundable entrance fee

Gifts from your Donor Advised Fund

IRA Qualified Charitable Distribution (QCD) or Required Minimum Distribution (RMD)

Designate Willamette View as a beneficiary of your IRA

Estate gifts

Honor and memorial giving

Donate marketable real estate

Donate your car, boat or RV

Gift of a paid-up life insurance policy

Ask how you can become a monthly donor for year-round impact.

For Information on Ways to Give, contact

**Loraine Collacchi,
Philanthropy Director
503.652.6203
lorainec@willametteview.org**

Legacy Circle

Building Community Together

The Blue Heron Foundation established a Legacy Circle program honoring those who wish to make a significant gift with lasting impact. Legacy Circle members are recognized on the Donor Wall in the Philanthropy Hallway to honor their generous commitments to our community. Thank you to the following Blue Heron Legacy Circle members for their generous commitment to our community.

Blue Heron Legacy Circle Members

Dorothy Anderson

Mary Ann Barlow

Loraine Collacchi

Jim & Vickie Edwards

Paul & Penny Fiske

Steve & Susan Gillis

George Grossman*

Henry Failing Fund*

Donna Howard

Vernon & Margaret Huffer

James B. Stephens Endowment Trust*

Ginna Jones

Carol Kline

Bernard & Marion Lindeman*

Jeanne Magmer

Bibi Momsen

Ron Nordeen

Mary Waldo*

Jane Work

*Deceased



"As a member of the committee that helped to establish the Blue Heron Foundation At Willamette View, I am excited to see the Foundation become an essential part of our community, able to support our residents and our staff, too."

**Jeanne Magmer,
Willamette View Resident,
Blue Heron Legacy Circle Member
and Blue Heron Foundation
Committee Member**

Blue Heron Foundation

At Willamette View



Building Community Together

2020 Blue Heron Foundation Committee

Sam Vigil, Jr., Committee Chair
Greg Fitzgerald, Willamette View, Inc. Board of Directors
Laura Engle, Willamette View, Inc. Board of Directors
Sonja Connor, Community Member
Patrick Hodai, Resident Council Past Chair
Linda Panaretos, Resident
Jeanne Magmer, Resident
Pat Wiemken, Resident
Matt Hartley, Healthcare Services Administrator
Craig Van Valkenburg, CEO

Blue Heron Foundation Leadership

Loraine Collacchi,
Philanthropy Director
Leslie Hawkins,
Development Assistant

Willamette View, Inc.



2020 Board of Directors

Craig Iverson, Chair
Deidra Krys-Rusoff, Vice Chair
Greg Fitzgerald, Past Chair
Gary Aas, Secretary/Treasurer
Laura Engle
Michael Fraser
John Hartsock
Dean Bergan
Sam Vigil, Jr.
Ginny Seabrook, Resident Council Chair
Jim Marsh, Resident Council Vice Chair
Patrick Hodai, Resident Council Past Chair

Willamette View, Inc. Leadership

Craig Van Valkenburg, CEO
Brian Thompson, CFO
Kim Buchholz, Administrator
Residential & Campus Services
Matt Hartley, Administrator
Healthcare Services
Loraine Collacchi, Philanthropy
Director
David Kohnstamm, Wellness
Director

Thank you Volunteers

A very heartfelt thank you to all our volunteers for their amazing generosity and their dedication of time to our community.

"I was trained by my parents to help people. My mother was always helping others. When people ask for help, I don't turn them down. It is what I'm supposed to do."

Buzz Oerding, the Watch Man

Buzz volunteers countless hours cleaning donated watches and replacing their batteries. He then delivers the watches to the Carousel so they can be sold. Buzz's contribution helps to benefit our community through the Blue Heron Foundation. Thank you, Buzz!



Carousel (l to r): Donna Krasnow, Joan Cartasegna, Janet Harney, Gail Durham (seated), Judy Kleinberg and Mary Norman.



Pantry (l to r): Sherry Johnston, Bubbles Lincicum and Jerry Hull.



Mart (l to r): Susan Bosshardt, Kathy Blume and Don McHarness



Library (l to r): Connie Isbell, Bibi Momsen, Cheryl Brockman, Shannon Katterle, Pat Watne, Henry Isbell, Glenna Kruger, Roy Kruger, Linda Apodaca, Elaine Toll, Grace Hawes, Sue Bosshardt, Sandra Helmick and John Kuramoto. (Seated, l to r): Judy Kleinberg and Ann Rutz.



Silk Flowers (l to r): Shirley Strutt, Ginna Jones, Sandra Pagels, Joana Frick and Marian Rauch.



Woodshop (l to r): Robin Bolton and Vern Huffer

GreenTeam
Together
 iPads
 Thank You BookBlvd
 Volunteers Merci Carousel
 Grazie BackpackBuddies Mart
 Pantry Scholarships Artists
 Thoughtfulness Neighbors FLIR Masks
 SunflowerClub Donors Gracias Inspired
Community
 Appreciate Friends Giving PenPals
 Gleaners BHFCCommittee Kindness
 StoreVolunteers Danke Compassion
 Residents Grateful Gratitude LegacyCircle
 StartRight BlueHeronFoundation
 Staff **Building**
 Supporters
 GiftsFromTheHeart
 ResidentCouncil



The Blue Heron Foundation At Willamette View is the supporting philanthropic arm of Willamette View, Inc.

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