

# Blue Heron Foundation

At Willamette View



## Gratitude

Report 2021

*Thank you  
Donors!*

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**\$407,074\*** donated in 2021

\*total donations minus Pantry cost of goods sold



## **A Message of Gratitude**

Dear Friends and Supporters,

Each year I get to look back at what the Willamette View community has accomplished through philanthropy. It is both astonishing and humbling!

On campus, your contributions are making a difference in your own resident council programs, staff scholarships, and resident financial assistance. As you look through the pages of this report you will see the many ways you and your neighbors are impacted by donations made to the Blue Heron Foundation.

Think of the Blue Heron Foundation when you see new artwork in the halls, hear the melodies of the chorus, select a new book at one of the libraries or pick up a meal in a recyclable container.

Your generosity also reached our local partners through sponsorships of local school Backpack Buddies and Start Right programs and supporting youth groups.

The Blue Heron Foundation is also your advocate for a healthier, more inclusive community.

When we learned about needs in memory care programming for residents, we were able to sponsor both the launch of The Sunflower Club Adult Day Program and the Honoring the Aging Mind <sup>SM</sup> education workshop series.

These are true examples of how through your donations, we are all truly Building Community Together.

With gratitude,

A handwritten signature in blue ink, appearing to read 'Loraine'.

Loraine Collacchi,  
Philanthropy Director

# Ways to Give

## Every gift makes a difference

By donating to the Blue Heron Foundation At Willamette View, you can help support programs and projects within your community and beyond.

## There are many ways to give

Gifts of 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

Matching Gifts

Estate gifts

Honor and Memorial Gifts

Donate marketable real estate

Donate your car, boat, or RV

Gift of a paid-up life insurance policy

Community Rewards

**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

# Honoring the Aging Mind <sup>SM</sup>

There are residents in every part of our campus with declining memory. Through a series of interviews and small group sessions with spouses, families and staff, the Honoring the Aging Mind <sup>SM</sup> initiatives came into focus. These build on key strengths of our culture campus-wide:

- Respect for the individual
- A spirit of compassion and connection
- Our pledge to bring peace of mind to residents and their families

## The Sunflower Club

At Willamette View

**W** The Sunflower Club has been a game changer for my spouse. The combination of activities—physical, mental, and emotional—has reduced confusion and anxiety, increased her sense of social wellbeing, and brought renewed joy to her daily life.

*- Sunflower Club Participant's Spouse*

The Sunflower Club Adult Day program 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 a safe, compassionate place to spend structured time, and provide relief for their caregiver.

**\$75,000 sponsorship**  
**over 2 years**



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



## Education

Thank you so much for bringing the “Help is Here” program to WV. I lost my mother to Lewy Body Dementia and would have so benefited from this training during my years-long journey. I think it is one of the most important contributions BHF has made to our community!

*-In appreciation, an anonymous Willamette View resident*

To support the needs of our community, we reached out to Providence Foundation’s “Help is Here” team consisting of co-authors Dr. Marian O. Hodges, a practicing geriatrician at Providence Portland Medical Center and Anne P. Hill, a retired lawyer who cared for her mother with Alzheimer’s disease, to provide educational sessions to almost five hundred residents, employees, and families.

All attendees were provided a copy of the “Help is Here” book for their personal use courtesy of the donors to Blue Heron Foundation.

Our vision for this program is to provide the entire Willamette View community with the knowledge and tools to support the aging mind.

More sessions will be scheduled for 2022.

**\$24,416** granted to support the program

**195** employees attended

**278** residents and families attended

Your gifts make it possible to sponsor Honoring the Aging Mind <sup>SM</sup> initiatives including The Sunflower Club and Education programs.



# Supporting Your Neighbors

## Resident Assistance through the Good Neighbor Fund

In 2021, the Blue Heron Foundation At Willamette View, through the generosity of your neighbors, awarded resident assistance in the amount of \$220,000. These funds helped seven individuals who demonstrated financial need, covering costs related to room and board, Home Care, transportation to medical visits, medical and pharmaceutical charges, and rental of medical equipment.

This financial support ensures a safe and comfortable living environment and quality of life for all Willamette View residents when they need it the most.

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"!



**\$220,000**  
granted to help  
seven residents\*  
(\*reimbursed for 2020)

**\$30,750** granted  
for COVID-19  
Relief

## 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



## The Art of Giving Well

**W** We at Willamette View pride ourselves on our engagement in the art of living well. For me that includes the art of giving well by donating to our Good Neighbor Fund. The fund is aptly named and helps support our quality of life at Willamette View. I am thankful to be in a financial position to help support this fund as a meaningful way to participate in the life of our community.

These are times of great uncertainty, and sometimes our neighbors find themselves financially challenged despite careful planning and prudent decision making. I am pleased that the Good Neighbor Fund is a source of assistance when these friends find themselves facing unforeseen circumstances beyond their control. Knowing that we are all in this together, I also appreciate having my donations stay within our community under the oversight of our own Board of Directors.

***-Jim Marsh, Resident Council Past Chair and Donor to the Good Neighbor Fund***

**W** We wish to express our sincere appreciation for the incredible care our parents received over the 13 years they were residents of the Willamette View community. From the beginning, we were so grateful they had chosen to live at WV. We knew they were safe, comfortable, and happy, which is of course what we wanted for them.

WV is truly a wonderful community that offers so many activities and ways to get involved. Our parents started in the Manor and enjoyed volunteering in the library and gardening in the community garden. Dad was also coach of the water volleyball team! When it was necessary to move to the Terrace, Dad was still able to have a raised bed garden for his dahlias and continued reviewing books for the library.

They eventually moved to the Heath Center where they were able to live out the rest of their lives in safety and comfort and in the loving care of their wonderful caregivers. They made some special friends during their stay which included residents and caregivers alike. Every step of the way they were treated with dignity and respect.

Due in large part to the excellent care our parents received at WV, they lived well into their nineties. Toward the end, they outlived their savings, and we were so grateful to WV for helping them live the rest of their lives in comfort with the loving support of an incredible staff. We truly don't know what we would have done without WV!

***-The Youngman Family***





# Gifts from the Heart...

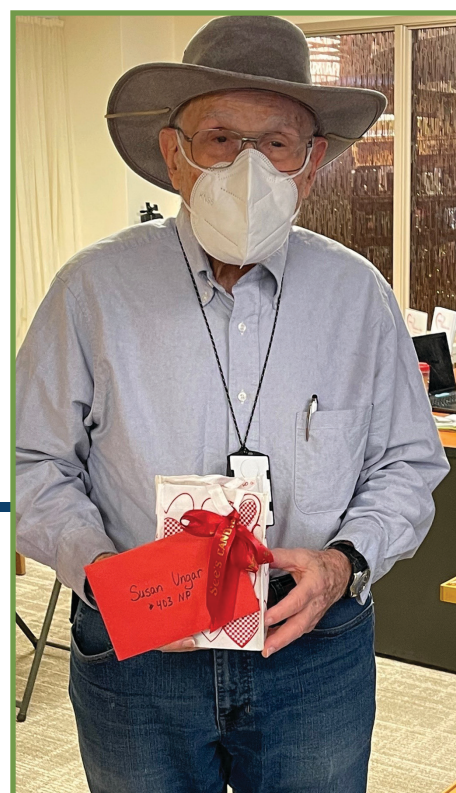
## Valentine's edition



**W** We, the current residents of Willamette View, are now guardians of our culture and need to safeguard it for ourselves and for those who will come after us.

*-Linda Lamb, former resident*

Thank you to all those who participated in the Gifts from the Heart program this year, not only honoring a friend, or loved one with Valentines' cards and special treats, but also supporting important programs here in our community!



**\$9,400** raised  
to help support  
programs in our  
community!

**177** Valentine's  
Cards delivered  
to residents, staff,  
family & friends

**125** Sweet treats  
delivered



# Green Fund

## \$10,968 Green Fund Grants

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

**W** The Blue Heron Foundation Green Fund is a dynamic fund that strives to enhance the daily practice of helping minimize waste and maximize return on investments throughout the Willamette View Campus. We have experienced support that helped brighten up our perspective in the Manor and Court Workshops. Thank you, Blue Heron Foundation, for your continued support to "INSPIRE THE ART OF LIVING WELL".

*-From the workers in the workshops*



Each time the fund balance reaches \$10,000, the Green Team will request project proposals and select projects to implement.

The grant awards for 2021 were as follows:

## \$2,793 LED lighting for the Court and Manor shops

- Replaced fluorescent lighting with LED
- Reduced electricity costs by about \$1,300 per year
- Reduced carbon emissions produced by electricity generation
- Eliminated mercury found in fluorescent lights
- Initial investment is paid off in about 1.4 years

## \$8,175 Reusable food containers & equipment

- Startup costs to begin a transition from paper to go containers
- Included initial supply of containers and washing & drying racks
- Can be used up to three hundred times, then recycled
- Monthly materials cost savings estimated at \$1,650
- Reduces the WVI carbon footprint





# Arts and Crafts Sale to Benefit artworks

**W** To you we give thanks! Your generous donation from the arts and crafts sale shows us that the artworks program is seen and understood for what we contribute to the Willamette View community. We appreciate this and continue to be humbled by your creativity and generosity.

Artworks is a unique program for a retirement community, a place where everyone is welcome and creative expression and connection are encouraged and celebrated. We look forward to continuing to give back through our goals of using the arts for wellness, healing, and community building.

*-In Gratitude, Kristen and Sally, artworks*

In December, the Blue Heron Foundation, in partnership with a talented group of artists, hosted an arts and crafts sale to benefit the artworks program. Over 30 artists participated, selling 900+ items, raising \$5,020 to help support creativity and therapy through art.

## \$5,020 for artworks





# Resident Council 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 2021 the Blue Heron Foundation awarded grants to cover costs for the Libraries and Art in Public Areas half of the Chorus Director salary, as well as matching grant for donations received from Garden Committee plant sales, Movies, Music, MusicWorks, Public Affairs and Vespers.

**\$12,728** Libraries\*

**\$12,000** Art in Public Areas\*

**\$3,960** 2021 Match \*\*

**\$1,250** Chorus Director  
for 2021

\*Reimbursed for 2020

\*\*Made in 2022 for 2021

The Resident Council oversees a multitude of programs and activities including outside professional musicians, outstanding speakers, an art collection, a library system of newly purchased books, and many other programs. The Blue Heron Foundation At Willamette View gives outright support to our Library Committee and our Art in Public Areas Committee. In addition, we receive funds matching resident donations up to \$10,000 a year. Thank you, Blue Heron Foundation, for your on-going support of resident programming.

*-Glenna Kruger, Resident Council Chair*





# Community Stores

“A common comment from Pantry users is, “I don’t know what I would do without the Pantry.” The Pantry provides personal care products, over-the-counter drugs and vitamins, office supplies, and snacks. The list could go on, of course, but for many of our residents, shopping at off-campus stores for these things simply isn’t possible.

And the Pantry volunteers are always there, serving customers, restocking shelves, handling our banking and charge slips, scheduling volunteers and shopping for the items we sell. Volunteers keep the Pantry going - and their service is indispensable.

*-Jerry Hull, Pantry Manager*

What struck me about working in the Carousel is what a natural “meeting space” it is for residents! Not to mention finding small treasures for that last minute birthday gift or hostess gift! The Carousel became a “destination” on walks in the building. Many people would go by several times to look at the windows—truly a source of entertainment and interest. Residents and staff have often found that one clothing or accessory item they needed at the last minute at good prices.

*-Johanna Niemitz, previous store manager*

## Thank you for your donation to the Heron Fund of \$73,619!





# Backpack Buddies

This program provides nutritious meals over the weekend to students in the North Clackamas School District who might otherwise go hungry. Backpack Buddies serves more than eight hundred students in 23 Head Start programs, elementary schools, and middle schools. The support from our community benefited Oak Grove Elementary School.

“ Thank you so much for the generous donation to the Backpack Buddy program! This will help so many students this year!

*-Heidi Dodge, Oak Grove Elementary School Principal*

## \$4,908 granted to Oak Grove Elementary School





# Start Right

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

**In 2021 Start Right helped over 1,400 children and we distributed \$5,207 to help children in need.**

**W** We are delighted to report that approximately 1400 foster children and others in low-income families received school supplies to take with them on their first day of school. Many families struggle to provide the basic back-to-school supplies that are essential to setting children up for educational success. You give them the added support they need through your investment of time and cash donations so that they can enter the school year with the supplies they need to be ready to learn. We are so grateful for your kindness in supporting the educational needs of the children right here in our own community.

**-The Start Right Team**



# The Clackamas Bookshelf



## The Clackamas Bookshelf

Resident Bibi Momsen organized the donation of over 101 boxes totaling 1490 books to the Clackamas Bookshelf in 2021. Books were donated from residents and the Book Boulevard. The Clackamas Bookshelf sells donated books and uses the proceeds to buy books to distribute to low-income children in Clackamas County.

**1,490** books donated

# Good Roots Food Bank

Pantry volunteers collect food items donated by Willamette View residents to help support the Good Roots Food Bank in Oak Grove. The Food Bank provides nutrient-rich food to the lower income community of Oak Grove.



# Gleaners

The Gleaners are a newly formed team with a goal to rehome gently used items that the Carousel and Mart are unable to sell. Volunteers prep, clean, and pack up the excess items and donate them to support local nonprofits.



**524** Hours  
Worked

**184** Loads of  
Laundry

**44** Apartments  
Emptied

**1025** Bags  
Donated



# Youth Car Washes

**W** The car wash helped us fund professional dance choreographers to choreograph our routines for the year. As well as get new uniforms to represent Portland State University. Not only that, but the car wash was at the beginning of our season and bonded our dance team together for the rest of the year. Thank you, Willamette View!

**-Lynsey Collacchi, Resident Assistant in the Health Center, and Terrace**

**W** It is with great gratitude that the Rex Putnam KINGSMEN THUNDER DRUM LINE thanks the foundation for its support of youth in the arts. The car wash fundraiser provided financial support for members/students in the area to help with program fees and basic athletic wear needed for participation. This is our 2nd car wash, and the day was sunny and after a recent ash weather event, we had cars lined up! Thank you for partnering with the youth of this area to support them and arts in schools.

**-Rene' Ormae-Jarmer, KINGSMEN Thunder Drum Line Director & Caption Head, Rex Putnam High School**

**Portland State University Viking Dance Team**

**Clackamas High Dance Team**

**Milwaukie High Dance and Cheer Team**

**Rex Putnam Kingsmen Thunder Drumline**





## Helping Hands Auction



**\$6,900 Raised**  
**\$10,000**  
additional  
matching grant  
from WV

The Helping Hands Program provides assistance to Willamette View employees who are experiencing unexpected financial hardship. In October, the Blue Heron Foundation held an art auction to raise funds for the program. Thank you for your generosity.

|| The program is received well by employees during difficult situations and unexpected financial hardships. The respect the program has is demonstrated by employees receiving funds, when the majority voluntarily pay back the monies granted, so it is available to their co-workers when it is needed. They participate in the program this way, showing their sense of “community” at WVI. We average about 10—12 employees who use funds each year, a small number with a big impact to the overall workforce. Employees are so grateful for the assistance.

*-Selene Andreassen, Human Resource Manager*





# Alan Fibish Scholarship

## Lisa \$2,500

Lisa Gaspar-Sanford, Dining Room Manager, received a \$2,500 Alan Fibish Endowed Scholarship through Clackamas Community College to help pay for business classes.



I am beyond ecstatic that you have chosen me to get the Alan Fibish Scholarship. This means so much to me and my family to know that my educational expenses are covered. I never had the privilege of meeting Mr. Fibish. However, I do have the privilege and pleasure of serving Carol Fibish. It is an honor to receive this award. Thank you so much. Again, thank you from the bottom of my heart.

*-Lisa Gaspar-Sanford, Dining Room Manager*



# Marion Lindeman Scholarship

## Riley \$3,000

Riley McLain, a CNA in the Terrace, received a \$3,000 Marion A. Lindeman College Bound Scholarship to pay for her nursing program at Linfield College!



## Blue Heron Legacy Circle

The Blue Heron Foundation established a Legacy Circle Program honoring those who want to make a significant gift in their estate plans with lasting impact. Circle members are recognized on the Donor Wall in the Philanthropy Hallway. They will receive special invitations to attend events that have been especially created to honor their generous commitments to our community. Thank you to the following Blue Heron Legacy Members for their generous investment in 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\*

Michael Litt

Arvin & Susan Luchs

Jeanne Magmer

Bibi Momsen

Ron Nordeen

Mary Waldo\*

Jane Work\*

\*Deceased

# Blue Heron Foundation

## At Willamette View

### 2021 Blue Heron Foundation Committee

Sam Vigil, Jr, Committee Chair

Laura Engle, Willamette View, Inc. Board of Directors

Greg Fitzgerald, Willamette View, Inc. Board of Directors

Ginny Seabrook, Resident Council Past Chair

Jeanne Magmer, Resident

Linda Panaretos, Resident

Pat Wiemken, Resident

Sonja Connor, Community Member

Craig Van Valkenburg, CEO

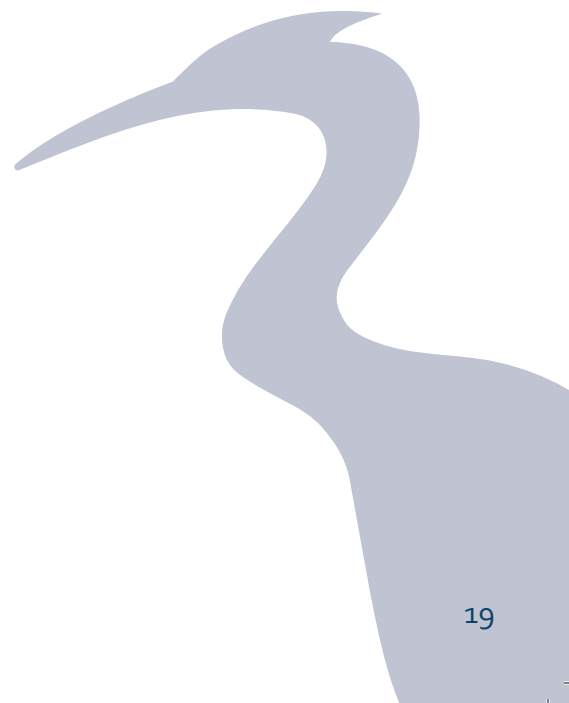
Matt Hartley, Healthcare Services Administrator

Loraine Collacchi, Philanthropy Director

### Blue Heron Foundation Leadership

Loraine Collacchi, Philanthropy Director

Leslie Hawkins, Development Assistant



# **Willamette View, Inc.**

## **2021 Board of Directors**

Deidra Krys-Rusoff, Chair

Laura Engle, Vice Chair

Craig Iverson, Past Chair

Gary Aas, Secretary/Treasurer

Greg Fitzgerald

Michael Fraser

John Hartsock

Dean Bergan

Sam Vigil, Jr.

Jim Marsh, Resident Council Chair

Glenna Kruger, Resident Council Vice Chair

Ginny Seabrook, 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





Willamette View's board of directors is entrusted to care for the organization and foundation's philanthropic and operating resources to the best of our ability. Each board member volunteers their time and professional knowledge to engage directly and deeply in the substantive work of honoring our mission: "To Inspire the Art of Living Well". I choose to honor the board's commitment and dedication to our residents and staff by making a personal donation to the Blue Heron Foundation each year.

***-Deidra Kryz-Rusoff, Willamette View Board Chair***



As a board member I am inspired by Willamette View's culture of philanthropy because, to me, a giving organization is a whole and healthy organization. It means that we are about more than survival; we are about hope and the belief that we can make a difference each day for ourselves and others.

I saw this in action this year when during the height of the pandemic, with all its attending challenges, our organization launched the Sunflower Club. Just when everything around us looked so bleak and surviving the thing seemed all consuming, here we were coming back with something positive, something hopeful, something new. That, to me, is strength.

Personally, I am as inspired by programs like Backpack Buddies as I am about legacy gifts. All of it is momentum. All of it signifies faith in the future. It is a way of saying this is the kind of world I want to live in and here is how we do it.

***-Laura Engle, Willamette View Board Vice Chair***



Every time I am on the Willamette View campus, I am impressed with how dynamic and vibrant this community is. You are so full of life, energy and positivity.

I believe that energy spills over into your philanthropic giving and demonstrates your commitment to the WVI community and the larger community around us. Your generosity helps to ensure today's needs will be met and helps to lay the foundation for the innovative programs of tomorrow.

The generosity of the WVI community just amazes me. Your generosity inspires me and others to join in supporting the WVI community through the Blue Heron Foundation, so that others, too, can know the joy of "the art of living well".

***-Sam Vigil Jr., Chair, Blue Heron Foundation Committee, Willamette View Inc. Board Member***

# Blue Heron Foundation Funds

## Heron Fund

Your gift to this unrestricted fund provides the most flexibility to support the evolving needs of our community. 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.

## 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 Funds

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.

## Honoring the Aging Mind <sup>SM</sup> Initiatives

Your gift will be used to help support programs that acknowledge and normalize the continuum of memory decline, addressing the fear of loss of independence, and creating peace of mind for our community through program elements specifically designed for residents and families as well as our staff.

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

# Financials

## Funds Held by Blue Heron Foundation\*

Honoring the Aging Mind <sup>SM</sup> Initiatives	\$	440,975
Riverview Capital Fund	\$	228,979
Art of Living Well Fund	\$	129,961
Good Neighbor Fund	\$	137,144
Green Fund	\$	14,522
Heron Fund	\$	343,803
Resident Community Fund (stores)	\$	30,543
Employee Education Funds	\$	53,173
	\$	1,379,100

## Funds Held by Others

Funds Held by Clackamas Community College Foundation	\$	116,300
Funds Held by The Oregon Community Foundation	\$	39,500
	\$	155,800

## In-kind Donations

Vehicles	\$	34,500
Artwork and Collectables	\$	15,000
	\$	49,500

**Total Funds** **\$ 1,584,400**

\*As of 12/31/2021











**“ Philanthropy is the loving wind that  
helps make living at Willamette View  
so wonderful!**

***-Sonja Connor, past Willamette View Board member,  
current community member of the Blue Heron  
Foundation Committee***



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

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