



the
clallam
community

FOUNDATION

Partners for Our Future

LOOKING to the FUTURE
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The Clallam Community Foundation

The Clallam Community Foundation is an endowment fund for the United Way of Clallam County and other Foundation Partner Agencies that provide needed assistance and a better quality of life for residents of Clallam County. The Foundation develops, receives, administers and distributes private charitable resources.

WHAT IS A COMMUNITY FOUNDATION?

A community foundation is a philanthropic organization whose mission is to enhance the quality of life in a local area. The foundation carries out this very broad mission by building a sizable endowment or permanent fund.

Leaving the principal intact, the fund's income is distributed to a variety of local nonprofit organizations. Thus, community foundations are a community's savings account, providing permanent resources which work in perpetuity to benefit future generations.

Typically, a community foundation comprises a collection of many separate endowed funds established by individuals, families, charitable organizations and corporations - a community of donors. These funds are pooled and invested by the foundation board of directors which represents the community. At the Clallam Community Foundation, decisions on the distribution of earnings are made by each Foundation Partner Agency's governing body, or by the donors or trustees of Named Funds.

HOW DOES THE COMMUNITY FOUNDATION DIFFER FROM UNITED WAY OR OTHER EXISTING CHARITABLE GROUPS?

Most nonprofit organizations conduct annual fundraising drives to support their current operations. As a general rule, much of the funds raised during a given year are used that same year. Community foundations usually do not mount annual campaigns. Instead they seek to secure gifts, typically in the form of bequests or planned giving, in order to build an endowment or permanent fund. The annual income from the endowment is then distributed through the foundation.

While many nonprofits have a specific mission, the Community Foundation has a broad mission to improve quality of life, and is therefore free to make grants in many areas with a charitable purpose. This allows funding for services that fall outside the scope of existing local groups, or fills a gap in the ability of existing local groups to address problems more fully.

WHO ARE THE PARTNER AGENCIES IN THE CLALLAM COMMUNITY FOUNDATION?

Currently, the Clallam Community Foundation has eleven partner agency funds. Each partner agency has made a commitment to develop an endowment fund within the Foundation. That fund will strengthen the agency's

financial health and its ability to provide essential services to local citizens.

Current partner agencies are:

Boys & Girls Club Foundation of the
Olympic Peninsula

Clallam County Family YMCA

Clallam County Literacy Council

Dungeness Valley Health &
Wellness Clinic

First Step Family Support Center

North Olympic Timber
Action Committee

Peninsula Community

Mental Health Center

Port Angeles Food Bank

Serenity House of Clallam County

St. Andrew's Place Assisted Living

United Way of Clallam County

Other non-profit organizations located in Clallam County may choose to join as Foundation Partners in the future.

HOW CAN AN INDIVIDUAL GIVE THROUGH THE CLALLAM COMMUNITY FOUNDATION?

Contributions may be in the form of cash, stocks, bonds, personal property, real estate, bequests, trusts, or by naming the Foundation as beneficiary of an insurance policy. United Way of Clallam County is also licensed by the State of Washington to sell charitable gift annuities.

CAN I ESTABLISH AN ENDOWMENT IN MY NAME OR AS A MEMORIAL TO SOMEONE ELSE?

With a gift of \$10,000 or more, you may create a fund in your name, or the name of a loved one, as long as it meets the Foundation's overall charitable guidelines. You may designate the earnings of the Named Fund to a specific area of interest or need, such as education, children's health, performing arts, low income seniors, or for a specific geographic area, to name a few possibilities.

The Foundation currently has eight Named Funds:

Bright Haygood Copsey Scholarship Fund

Karen Byrd Scholarship Fund

Community Service at Work Fund (scholarships and grants),

Michael Sindars Scholarship Fund,

Hull Family Fund (scholarships, education assistance to West End schools)

Hillside Fund (grants to non-profits)

Mac Ruddell Community Fund (scholarships and grants)

James E. Whatton Family Fund (grants to non-profits)

DO I HAVE TO GIVE TO A PARTNER FUND OR NAMED FUND?

No. You can make a lasting gift without specifying its distribution. Undesignated donations are placed in the United Way of Clallam County Fund. The United Way Board of Directors makes distribution decisions on the earnings from those contributions.

WHAT IS THE MINIMUM CONTRIBUTION THE FOUNDATION WILL ACCEPT?

Contributions of any amount are appreciated and will be used to improve the lives of people living in our community.

IS THERE A FEE TO PARTICIPATE?

To cover administrative costs, a nominal annual fee may be charged on certain types of funds. Fees vary based on the complexity of the fund. In addition, funds may be charged periodic fees by the asset manager.

IS MY CONTRIBUTION TAX DEDUCTIBLE?

Yes, your contributions are fully deductible within the limitations set by the IRS.

THE WHATTON FAMILY FUND

The Whatton Family Fund of the Clallam Community Foundation was created by Sequim resident James Whatton in 1996. Jim and his wife, Evelyn, moved to Sequim in 1971 upon Jim's retirement from the U.S. Navy. They were active community members and wanted to ensure a continued funding source to local organizations. Jim Whatton died in 1996, and his son, Doug Whatton, is now advisor to the Fund.

The Whatton Family Fund distributed \$69,000 to Clallam County agencies from 1996-2006.

"Community needs are met most effectively by the community itself. We live here; we know where help is required most. The Clallam Community Foundation offers a unique opportunity to combine personal involvement with a way of meeting those needs. If my father had not created this fund, I probably wouldn't be as involved, and wouldn't have a say in how my family can continue to make a difference here in Clallam County. Through the Foundation, I can stay committed to the community I lived in as a youth, no matter where I go and what I do in life."



Doug Whatton
Whatton Family Fund Advisor

Clallam Community Foundation Donors

PARTNER AGENCY ENDOWED FUNDS

Boys & Girls Club Foundation of the Olympic Peninsula
Clallam County Family YMCA
Clallam County Literacy Council
North Olympic Timber Action Committee
Peninsula Community Mental Health Center
Port Angeles Food Bank
Serenity House of Clallam County
United Way of Clallam County

NAMED FUNDS

Bright Haygood Copesey Scholarship Fund
Karen Byrd Fund
Community Service at Work Fund
Hillside Fund
Hull Family Fund
Mac Ruddell Community Fund
Michael Sindars Memorial Scholarship Fund
Whatton Family Fund

GIFT ANNUITIES ISSUED

Richard & Margaret Boyce
Frank & Mary Deckebach
Helen Miller
Tim Morgan

UNITED WAY OF CLALLAM COUNTY FUND

GIFTS AND BEQUESTS RECEIVED

Anonymous Donor
Chuck Applegate Estate
Evelyn Evans Estate
Gunnar & Frances Fagerlund
Josephine Lougee Estate
Robert & Lettie McCool Family Trust
Tim Morgan
Elaine Sandison Estate
Mildred Trunkey Estate
Woodrow & Zilla Ward Estate

GIFTS AND BEQUESTS PROMISED

Scott & Bobby Ewing
James D. & Joanne T. Hallett
Mark & Patty Hannah
Lloyd & Julia Hightower
Gary Kriedberg & Jody Moss

The Clallam Community Foundation

Partners for Our Future

PARTNER AGENCY FUNDS

We share a vision about the importance of establishing a permanent endowment to meet local needs. The Clallam Community Foundation enables us to invest our contributions together and share marketing strategies, while still maintaining our individual agency funds and missions.

Boys & Girls Club Foundation of the Olympic Peninsula
Clallam County Family YMCA
Clallam County Literacy Council
Dungeness Valley Health & Wellness Clinic
First Step Family Support Center
North Olympic Timber Action Committee
Peninsula Community Mental Health Center
Port Angeles Food Bank
Serenity House of Clallam County
St. Andrew's Place Assisted Living
United Way of Clallam County

Administered by United Way of Clallam County



PO Box 937
102½ E First Street
Port Angeles WA 98362
360-457-3011

www.clallamfoundation.org
www.unitedwayclallam.org

The United Way of Clallam County, dba Clallam Community Foundation, is a tax-exempt charitable organization under IRS code 501(c)3. EIN 91-0714632. Please contact your lawyer or financial advisor for more complete information on the options best suited to you.