



Oregon Cultural Trust
Donor Development Committee
Friday, October 3, 2025
1:00 PM - 2:00 PM

[Virtual Meeting](#)

AGENDA

1. Select Chair of Committee
2. Review fundraising plan
3. Discuss Board involvement
4. Discuss upcoming Board meeting
5. Next Committee meeting

See Attachment:
END OF YEAR FUNDRAISING & AMBASSADOR ENGAGEMENT PLAN

OREGON CULTURAL TRUST

END OF YEAR FUNDRAISING & AMBASSADOR ENGAGEMENT PLAN

Last updated: September 11, 2025

END-OF-YEAR (EOY) FUNDRAISING PLAN

OBJECTIVES & SUCCESS METRICS

- Increase total year-over-year revenue by 5%, from \$5,215,746.72 to \$5,474,434.06.
- Double corporate donors from 16 to 32 this year via a Board-led Corporate Sprint.
- Engage 50 Ambassadors and 100 actions (talks, tabling, direct outreach, social posts).

AUDIENCES

- **Current donors** — steward/upgrade by 12/31.
- **Lapsed donors (12–36 months)** — re-engage with “impact now + credit by 12/31.”
- **Corporate prospects** (business owners/CEOs from board networks) — Board-led sprint.
- **New prospects** — arts attendees, libraries/museums supporters, heritage networks.
- **Ambassadors (regional champions)** — volunteers for local activation.

MESSAGE BANK (HIGH-LEVEL)

- **Core:** Make Culture Count. Your year-end gift fuels arts, heritage, and humanities in every corner of our state.
- **How it works:**
 - 1) Give to your favorite cultural nonprofits.
 - 2) Match with a Trust gift by 12/31.
 - 3) Receive a **dollar-for-dollar Oregon state tax credit** for your Trust gift (see limits).
 - 4) The Trust distributes funds statewide.
- **Proof:** Grants in all 36 counties and 9 tribes; impact stories
- **Urgency:** Dec 31 deadline; match your giving while the credit is available.

KEY DATES & CADENCE (SEP–DEC)

- **Sep (Plan):** Finalize goals, segments, assets; refresh landing page; partner toolkit v1. Seed ambassador recruitment.
- **Oct (Launch):** Story series; first appeal email + direct mail drop; partner spotlights.
- **Nov (Build):** Culture of Thanks (11/1–11/27); Giving Tuesday push (11/25–12/3 window); lapsed reactivation.
- **Dec (Drive & Close):** weekly drumbeat (12/1, 12/8, 12/15, 12/22);
 - **Dec 27–31** daily reminders (AM/PM), ambassador blitz; final countdown (12/31).

CHANNEL PLAN

EMAIL

- Cadence: 7–9 touchpoints (launch, stories, Giving Tuesday, 3x December + 12/27–12/31 daily shorties).
- Segments: current and lapsed (monthly list pulls).
- Personalization: first name; county.

WEBSITE & LANDING PAGE

To be coordinated with Watson

- One primary EOY page: simple explainer of “how the Trust works,” deadline, FAQs, testimonials, impact map, share buttons.
- Embedded giving form (mobile-first), Apple/Google Pay, one-click match explainer, tribute/pledge options.

ORGANIC SOCIAL

- 3x/week Oct–Nov; 4–5x/week in Dec; daily 12/27–12/31.
- Formats: donor selfie quotes, 15s vertical reels (“how the credit works”), county spotlights, ambassador reposts.
- UGC: #MakeCultureCount; “I give because…” sticky prompt.

DIRECT MAIL

- One 6x9 postcard (Oct) + one letter (early Dec) to current/lapsed; QR + short URL; county-specific insert.

PR & THOUGHT LEADERSHIP

- Op-eds from regional ambassadors; press release by region.

ADS

- Evaluate 2024 ads with which Turell group was connected and recommend 2025 ad placements (arts programs, publications, etc.).

AMBASSADOR FIELD ACTIVATION

- Ambassadors lead local tabling, brief talks, presentations at service clubs with county spotlights and a simple toolkit + tracking sheet.
- Regional meet-ups and micro-events.

CREATIVE & ASSET CHECKLIST

- Campaign theme line: **Make Culture Count.**
- Explainer infographic: “How the Cultural Tax Credit works.”
- Social: 30s sizzle + 15s vertical; 5–7 stats; county/regional map tiles; testimonial quote cards.
- Email set (9): headers, buttons, accessibility-checked HTML.
- PR kit: fact sheet, statewide impact stats, county data, story bank (10 short stories)
- Ambassador toolkit (see Ambassador Engagement Plan).

COPY BANK (PLUG-AND-PLAY)

EMAIL SUBJECTS

- “Make Culture Count.”
- “Match your love of arts, heritage and humanities by 12/31.”
- “Oregon’s cultural tax credit: how it works (simple).”
- “Last 48 hours for 2025 credit.”

HEADERS / CTAS

- “Fuel arts, heritage, humanities across 36 counties.”
- “Give now • Match with the Trust • Claim your credit.”
- “Donate by Dec 31.”

MICROCOPY (SOCIAL)

- “Do you love Oregon’s arts, heritage, humanities? Give now and match with the Trust by 12/31. It’s simple. [link]”

DATA, TRACKING & REPORTING

TRACKING

- Referrals to website, and to donation (if possible) including through:
 - QR codes (flyers, presentations, print ads managed by TG, etc.)
 - Emails
 - Social posts
- Net weekly contributions, with comparison to 2024.
- If possible: revenue by source/segment; donors; avg gift; match completion; county distribution; retention.

REPORTING

- Host online dashboard of data and ambassador actions.
- Report progress to Trust staff and Ambassadors with motivating messages.
 - Weekly, Nov – Dec.
 - Daily, 12/27 – 12/31.

AMBASSADOR ENGAGEMENT PLAN

GOAL

- Activate **50 trained ambassadors** statewide to complete **100 ambassador actions** by 12/31 (talks, tabling, presentations, direct outreach, social posts), with representation in all 36 counties and all 9 tribes.

WHO IS AN AMBASSADOR?

- Trusted community connector (board member, artist, librarian, museum or heritage volunteer, business leader, Rotary/Chamber leader, educator).

RECRUITMENT TARGETS & TIMELINE

- **Sep 15 – 24:**
 - Connect with 2024 Ambassadors and Coalition Members.
 - Secure commitments from 50 individuals.
 - Recruit a representative for every county and tribe.
 - Recruit 6 regional leaders.
- **Sept 29:** Info session for interested potential Ambassadors
- **Oct 6:** Regional Leader training
- **Oct 13:** Virtual kickoff; deliver toolkits.
- **Oct 23 – 31:** Regional pod gatherings (online and in person)
- **Nov – Dec 26:** Weekly office hours; monthly huddles; share wins; assign counties with gaps.
- **Dec 27–31:** Daily 15-minute blitz calls/texts.

ONBOARDING TOOLKIT (DELIVER AS A SHARED FOLDER)

- Quick-start guide (1 page) – “How the tax credit works” and the 3 most effective asks.
- Scripts: text/DM, email, 30-second elevator, voicemail.
- Assets: 3 emails, 6 social tiles, 3 reels, regional or county map graphics, QRs + short url link.
- Personal tracking sheet (commitments + outcomes).
- FAQ + compliance notes + accessibility tips.

ACTIVATION TRACKS (PICK 1–3 PER AMBASSADOR)

- **Ask-5:** identify 5 people you know; text + follow-up call; share result screenshot.
- **Host-a-Moment:** 30-minute coffee, table at an event, club, organization or board presentation.
- **Creator:** record a 20–30s vertical video (“I give because...”) and post with link.
- **County Champion:** local media calendar submissions; write op-ed; county coalition tabling; library or 3rd space display.

WEEKLY PROMPTS (NOV–DEC)

- **Nov Wk 1:** “I give because...” story post + tag 3 friends.
- **Nov Wk 2:** DM to 5 friends with simple explainer link.
- **Nov Wk 3:** Share with friends and colleagues.
- **Nov Wk 4 (GT):** post morning + evening; update stories with live progress.
- **Dec Wk 1–3:** one post + 5 DMs weekly; spotlight a county or org you love.
- **Dec 27–31:** daily AM/PM text/call; use countdown tiles. Scripts (plug-and-play)

30-sec elevator

- “Oregon has a unique way to keep arts, heritage, and humanities strong. Give to a cultural nonprofit you love, then match that gift to the Cultural Trust by Dec 31 and you will receive a dollar-for-dollar Oregon state tax credit for your Trust gift (see limits). It keeps culture thriving in all 36 counties. Here’s the link.”

Text/DM

- “Hey! Quick favor for Oregon culture. Will you join me with a year-end gift and match it to the Cultural Trust by 12/31? It’s simple and statewide. Link: _____”

Email

- Subject: “Make Culture Count with me”
“I’m supporting the Cultural Trust again this year because the impact reaches every corner of the state. If you’re giving to the arts or heritage, consider matching with a Trust gift by 12/31. Simple explainer + donate: _____ Thank you!”

Voicemail

- “Hi _____ —it’s _____. I’m calling about a quick year-end culture boost. Oregon’s Cultural Trust lets you match your giving and support statewide grants. I’ll text you the link. Thanks!”

RECOGNITION & MOTIVATION

- Shout-outs, leaderboard, thank-yous.

ACTION TRACKING & RECOGNITION

- Each ambassador keeps a simple **action log** (talks, tabling shifts, direct outreach texts/emails, social posts).
- Recognize top action-takers by region and shout-outs.
- Weekly (Nov – Dec 26) or daily (Dec 27 – 31) updates on progress.

SUPPORT & ESCALATION

- WhatsApp, GroupMe, Google Chat (?) for assets, questions, and quick approvals.
- Office hours: 1 hour weekly in Nov-Dec.
- FAQ: credit basics, deadlines, receipts, matching gifts, (Donor Advised Funds) DAFs, stock gifts.

IMPLEMENTATION CHECKLIST

By Sept 15

- Lock target numbers and segments including: 5% revenue lift target and corporate doubling target.
- Coordinate creative direction with Watson.
- Draft email #1 and direct mail copy.
- Coordinate any feasible webpage updates; confirm payment methods.
- Email Ambassadors from 2024 and potential Ambassadors (Coalition Members and short-list).
- Activate first 25 Ambassadors.
- Identify regional Ambassador leads.
- Schedule info session, and trainings.
- Launch Board-led Corporate Sprint prep: confirm board champions, prospect worksheet, and first 10 corporate targets.

By Oct 15

- Finalize full asset suite and toolkits.
- Upload tools; confirm county data.
- Set up monthly list-pull routine and ambassador action-log templates.
- Confirm PR/editorial calendar.
- Identify 2025 Ambassadors.
- Train regional Ambassador leaders.
- Approve Board corporate packet (one-pager, scripts, email templates, pledge form).

By Nov 15

- Trained Ambassadors.
- Activated regional Ambassador pods.
- Scheduled Ambassador micro-events.
- Reviewed mid-point Board corporate sprint; add/replace prospects as needed.

Dec 1–31

- Reporting weekly.
- Refreshed creative if needed.
- Final-week daily cadence; staff + ambassadors in “blitz mode.”
- Close-out Board corporate 12/27–12/31 with daily touchpoints.

AMBASSADOR RE-ENGAGEMENT EMAIL – DRAFT

(Trust staff to send)

Subject Options

- Ambassadors, thank you — **Make Culture Count** this year + quick RSVP.
- **Make Culture Count** — your regional meet-up inside.

Preheader We’re simplifying tools and meetings based on your feedback. Join your region’s quick kickoff.

Body (paste-ready) Hello [First Name],

Thank you for everything you’ve done to keep Oregon’s arts, heritage, and humanities thriving. We heard your feedback and we’re simplifying the Ambassador program this year — clearer message, lighter-lift tools, and more ways to connect with each other locally.

What’s New

- A simple 1-2-3 message and a refreshed explainer.
- A concise toolkit: slide deck + script, elevator pitch card, pocket card/leave-behind, FAQs, and ready-to-post social.
- Coordinated outreach.
- **Regional meet-ups** so we can identify and claim opportunities.
- Mini trainings and a short, steady cadence (no overwhelm).

Quick actions

- 1) RSVP to your regional meet-up: [Region RSVP Link].
- 2) Tell us how you'd like to help (pick 1–3): present • table • personal outreach • share on social. [Form link]
- 3) Interest with helping with regional coordination. [Y/N Form link]
- 4) Confirm your best email + mobile. [Form link]

Thank you again for your time and leadership. Together we'll finish strong by 12/31.

With gratitude, [Name], [Title] Oregon Cultural Trust

OPEN CALL: EMAIL TO COALITION MEMBERS AND SHORT LIST OF POTENTIALS– DRAFT (BECOME AN AMBASSADOR)

(Trust staff to send)

Subject options

- **Make Culture Count** — become a Cultural Trust Ambassador
- Love the arts, heritage, humanities? Join our Ambassador team

Preheader Low-lift, local ways to help before 12/31 — we'll give you the tools.

Body (paste-ready) Hi [First Name],

We need volunteer Ambassadors to help spread the word about Oregon's unique way to keep culture strong in every county. Commitment is just through December 2025. It's flexible, local, and we provide everything you need.

What Ambassadors do (choose 1 to 2):

- Give a short talk at a community or workplace gathering.
- Host a table at a local event.
- Text or email a few friends and colleagues.
- Share ready-made posts on social.

We'll train you in 30 minutes, introduce you to other Ambassadors in your region, and share a simple toolkit you can use the same day.

Interested? **Sign up here:** [Ambassador Interest Form]

Prefer to start by learning more? **Join a 20-minute info session:** [Info Session RSVP]

Thanks for helping Make Culture Count!

— Oregon Cultural Trust

REGIONAL MEETING SCHEDULING PLAN (50 AMBASSADORS)

Regions (draft): Portland Metro • North Coast, Lower Columbia & Willamette Valley North • Willamette Valley South & Central Coast • Central Oregon • Southern Oregon & South Coast • Eastern Oregon.

Format: 60-minute hybrid (in-person host site + Zoom) at a library/museum/arts center. Provide slides + one-page.

Scheduling method (fast + clear):

- 1) Publish **two candidate time windows per region** (Week A evening, Week B noon).
- 2) Send each region a **single RSVP form** (name, cell, preferred slot, in-person/Zoom).
- 3) Lock the majority slot 72 hours after send; send calendar invites; post final times to a simple public page.
- 4) Assign a **regional point person** to greet, take attendance, and capture 3 action items per meeting.

Agenda (60 min):

- 0–10: Welcome, statewide picture, quick 1-2-3 message.
- 10–25: “What works here?” county scan and target orgs.
- 25–35: Pick two activation tracks per attendee (present/table/outreach/social).
- 35–50: Micro-planning in pairs/pods; swap contact info.
- 50–60: Confirm dates, who does what by when; photo + thank-you.

TOOLS & COLLATERAL UPDATE

Project: EOY25 Ambassador & Donor Tools – Simplify & Activate.

Objective

Enable donors and Ambassadors to understand and act on the Trust’s 1-2-3 message in under 30 seconds; equip Ambassadors with light, modular tools they can use the same day.

Background (why now)

Prior research showed messaging complexity, confusing web path, lack of goals/reporting, and Ambassador tools that felt heavy. We’re streamlining to the essentials and anchoring activity in regional pods.

Audiences: Primary: Ambassadors; Donors & Prospects.

Deliverables

- **Explainer infographic** (1-2-3 “Give → Match → Get Back” + deadline).
- Slide deck (8–10 slides) + speaker script (board/Rotary/community).
- **Elevator-pitch card** (front: 30-sec pitch; back: QR + URL).
- **Pocket card / leave-behind** (county-agnostic + editable county field).
- **FAQ (1-pager)** (credit basics, deadlines, receipts, DAFs, stock gifts).
- **Ready-to-post social** (6 statics + 3 reels; square + vertical).
- **Regional meeting kit** (agenda, sign-in, action capture sheet, slide template).
- **Ambassador tracking sheet** (10-contact list with outcomes; action log template).

Voice & Design

Follow Watson’s creative.

BOARD-LED CORPORATE GIVING SPRINT (4 WEEKS)

GOAL

Double corporate donations vs last year by activating trustees' personal networks quickly and respectfully.

WHY THIS WORKS NOW

- Scarce base (few corporate donors) → a small number of wins can 2x year-over-year.
- Trustee credibility opens doors faster than cold outreach.
- The Cultural Trust's unique value (statewide impact + cultural tax credit within statutory limits) is attractive to Oregon-based employers.

MINIMUM VIABLE SPRINT (MVS)

- Each board member identifies **3–5 businesses** they know personally.
- Make **one warm intro + one direct ask** per company (email → call → follow-up).
- Target decision-makers: owner, CEO, CFO, head of community investment/HR.

PROSPECT FIT (QUICK FILTERS)

- Oregon-headquartered or substantial Oregon workforce.
- Publicly values culture/community; visible employee engagement.
- Clear December giving window; openness to tax-advantaged gifts.

BOARD PACKET (DELIVERABLES)

- 1) One-pager: impact, 1-2-3 explainer, examples of corporate engagement, QR/URL.
- 2) Email templates + call/voicemail scripts (below).
- 3) Pledge form (PDF + e-sign) with recognition options.
- 4) Tracking sheet (Google Sheet): company • contact • stage • last touch • next step • likelihood • pledged \$ • close date • attribution (board member).
- 5) FAQ & compliance note: credit "within statutory limits"; encourage consultation with tax professionals.

BOARD EMAIL TO A BUSINESS OWNER (TEMPLATE)

Subject: Quick Oregon culture opportunity before 12/31

Hi [First Name] —

I'm a trustee with the Oregon Cultural Trust. We fund arts, heritage, and humanities work in all 36 counties. I'm reaching out because there's a simple year-end way your company can support culture statewide. The Trust uses a unique Oregon mechanism that may include a state tax credit for qualifying Trust gifts (within statutory limits).

Would you consider a year-end corporate gift of \$[ask] or sponsoring an employee-match challenge? I can share a one-pager and a 10-minute overview. If it's a fit, we'll make it easy and visible for your team.

Could we schedule a quick call next week?

Thanks for considering,

[Board Member Name]

[Mobile]

CALL SCRIPT (2–3 MINUTES)

- Purpose: quick year-end culture boost; statewide impact; simple mechanism; deadline 12/31.
- Options: corporate gift; employee match challenge; workplace campaign.
- Close: suggest a specific amount/date; confirm next step; offer one-pager.

LINKEDIN INMAIL (SHORT)

Hi [Name] — I serve on the Oregon Cultural Trust board. We're inviting a handful of Oregon employers to make a simple year-end corporate gift or match challenge that supports arts/heritage statewide. Can I send a 1-pager?

SPRINT TIMELINE

- **Week 0 (now):** finalize target list; send board packet; 20-minute briefing.
- **Week 1:** first emails out; follow-up calls; log stages.
- **Week 2:** meetings; secure first pledges; share wins; swap intros.
- **Week 3:** second-wave outreach; workplace campaign intros.
- **Week 4:** close and thank; invoice/pledge follow-through.

ACCOUNTABILITY

- 15-minute **Friday huddle** (board/ED/dev lead) to review the tracker.
- Traffic-light flags for each prospect; unblock asks instantly.
- Recognize early wins in board communications.