

Submitter: Katie Wojke  
On Behalf Of: Western Oregon University Foundation  
Committee: House Committee On Higher Education and Workforce  
Development  
Measure, Appointment or Topic: HB3213

### House Bill 3213 Testimony

Chair Hudson, members of the committee, my name is Katie Wojke. I am the vice president of advancement at Western Oregon University and executive director of the Western Oregon University Foundation.

Philanthropic giving is a personal act. It was a personal act 169 years ago when Western Oregon University was founded, and it remains a personal choice for the thousands of donors who contributed to the Western Oregon University Foundation during the past fiscal year. The Western Oregon University Foundation has grown over the years to \$33.6 million in total assets due to the generosity of donors through outright gifts, bequests, and other planned gifts, as well as investment earnings. The proposed terms of House Bill 3213 will drastically change our relationships with donors and potentially jeopardize many of our continuous donations.

1. Our donors trust they have a personal relationship with Western Oregon University. We treat each donor individually following best practices for effective nonprofit administration, including confidentiality, conflict of interest, fiduciary compliance, and whistleblower policies.
2. Thanks to the generosity of our donors, we have several hundred endowed scholarships at Western. These scholarships are important for the students who attend Western. Half of our undergraduates are the first in their families to attend college; three quarters of our students receive financial aid, thus making foundation scholarships a vital part of the assistance they receive.
3. When donors establish an endowed scholarship or program fund, the Foundation and the donor sign a legal agreement. The agreement describes the amount, type, and purpose of the donation, and how the foundation will use the funds for the advancement of the university's mission, which is to provide a personalized learning community where individuals experience a deep sense of belonging and empowerment. The agreement is also a statement of the donor's personal commitment and reasons for creating the fund. While some donors want their names on a scholarship or program fund, many request their names be kept private. This bill requires the disclosure of a donor's name, the purpose of their gift, and details of the agreement settled upon between the donor and the foundation. Current and potential donors may forego establishing endowments because their private donation would become a public transaction. This will harm members of our donor base and will have a significant impact on the funds we raise to help our student's complete college.

4. As a foundation at a regional public university, we have limited staff resources (8 FTE in total) and technology. The bill would require us to add or develop programming that enables information about the foundation's private funds to be linked with the university's public funds. The bill would require us to use staff and other resources for non-mission-related activity. We annually produce other publicly available documents about our activities including an annual audit, an annual report, and federal tax returns.