



**BECKER CAPITAL
MANAGEMENT**

**2023
ANNUAL
PHILANTHROPY
REPORT**

**PORTLAND, OR | BEND, OR | SEATTLE, WA
503.223.1720 | beckercap.com**

We are delighted to present to you our first annual philanthropy report, reflecting the impactful journey we have embarked on together over the past year. As a valued partner of Becker Capital, we are excited to share with you the highlights, achievements, and meaningful contributions made in 2023.

This report serves as a testament to our collective commitment to creating positive change and fostering sustainable development within our communities. Through our combined efforts, we have been able to address pressing social challenges, champion important causes, and make a tangible difference in the lives of those in need.

Within these pages, you will find compelling information and insightful data illustrating our philanthropic endeavors. From empowering underserved youth through education and mentorship programs to promoting environmental conservation and sustainability practices, each initiative represents a step forward in our shared mission to build a better world for all.

We extend our heartfelt gratitude to you for your unwavering partnership throughout this journey. Your support has been instrumental in driving positive change and enabling us to amplify our impact on a larger scale. Together, we have demonstrated the power of collective action and exemplified the true spirit of philanthropy.

As we reflect on our accomplishments and look ahead to the future, we remain committed to our mission of making a meaningful and lasting difference in the lives of individuals and communities. We are excited about the possibilities that lie ahead and are grateful for the opportunity to continue working alongside you to create a brighter tomorrow for generations to come.

Thank you once again for your continued support, partnership, and belief in our shared vision. We hope this report inspires and reaffirms your commitment to making a positive impact in our communities in the Pacific Northwest.

With sincere appreciation,

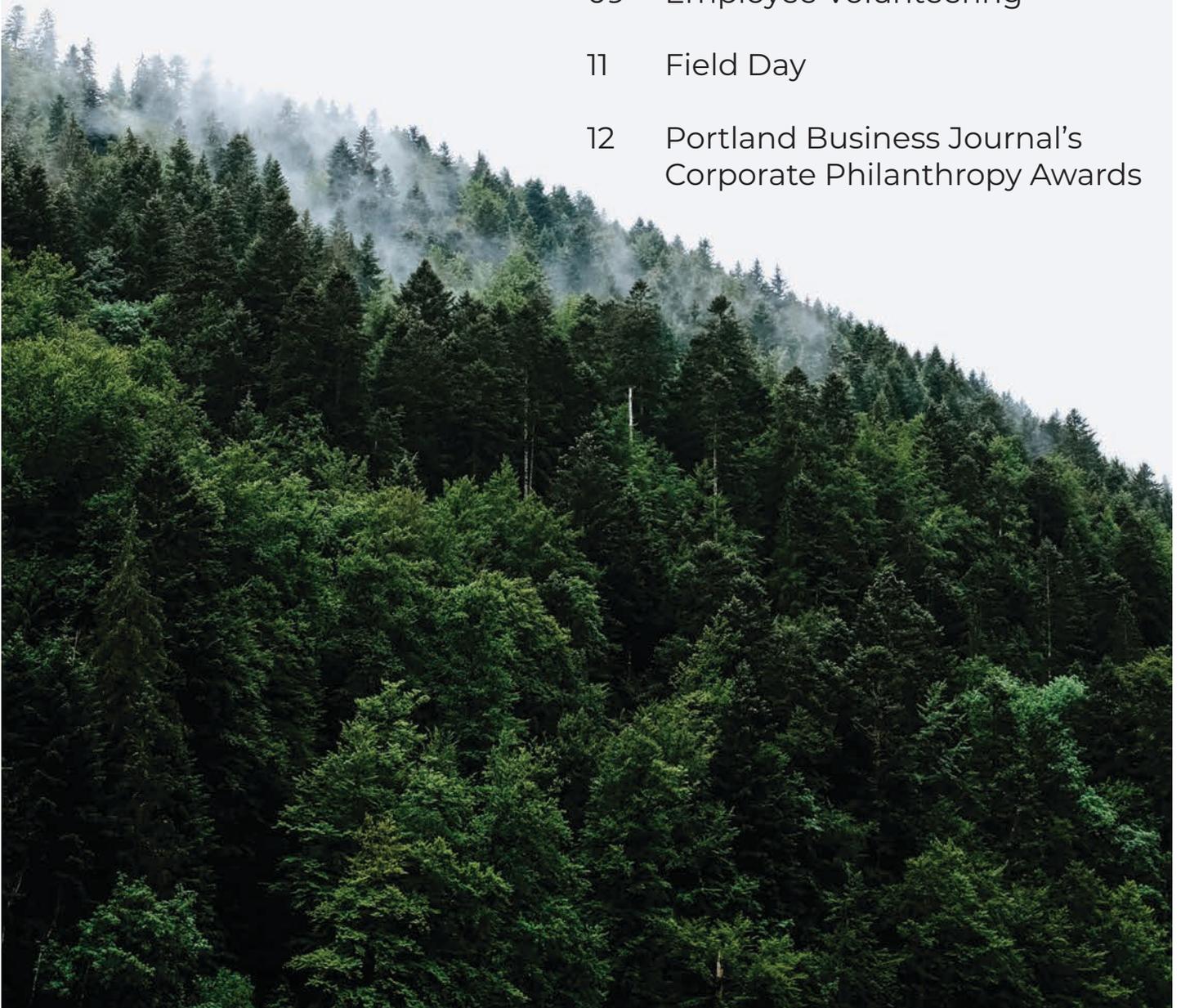


A handwritten signature in blue ink, appearing to read "J. L. Becker".

President & CEO

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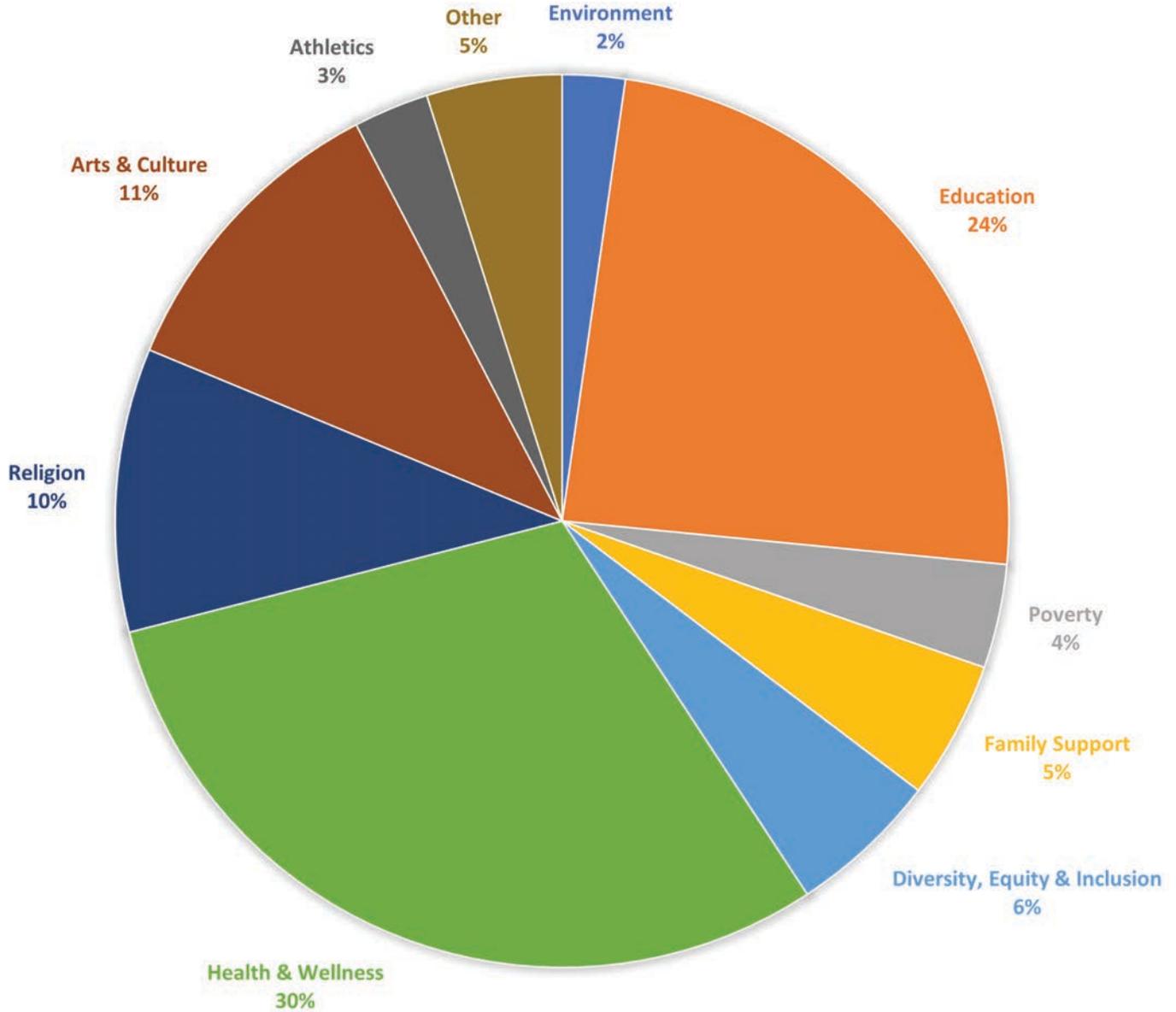
A Culture of Giving



When people think of Becker Capital, community involvement almost always comes to mind. We proudly embrace a philanthropic company culture that demonstrates our commitment to the communities in which we work and live, and we have been one of the most philanthropic medium-sized companies in the state of Oregon for more than a decade.

- 1% of Becker Capital's gross revenue is donated to charities
- We partner with over 70 nonprofit organizations directly as clients
- Formal employee matching program
- Employee volunteer incentives
- 2,700+ annual volunteer hours

BECKER CAPITAL'S 2023 DONATIONS BY SECTOR



Health & Wellness	\$66,622	Family Support	\$11,000
Education	\$53,515	Diversity, Equity & Inclusion	\$12,000
Arts & Culture	\$24,500	Athletics	\$6,000
Religion	\$22,630	Environment	\$5,000
Poverty	\$8,300	Other	\$10,793

**TOTAL MONETARY DONATIONS IN 2023:
\$220,360**

Meet Tom Doyle

We hired Tom Doyle as an additional element to further enrich the services we provide to our nonprofit clients. Tom joined the Becker Capital team for the dedicated purpose of supporting our nonprofit clients and their leaders. He brings a wealth of experience as a board and administrative leader for many nonprofits, making him highly attuned to the challenges that nonprofits typically face.



Today, he works with our clients' boards, executive directors, presidents, and leadership teams to help tackle their strategic, tactical, and cultural challenges.

Tom has work and project experience in social services, education, healthcare, the arts, and the environment and has supported dozens of projects for nonprofits and foundations. In addition to an educational background that includes the liberal arts and theology, Tom also has an MBA—all of which position him as a strong and valuable conversation partner, whether the topic is financial statements or mission statements. Tom is passionate about developing leaders, and he has cultivated an extensive network that makes him a natural connector in our communities.

It takes audacity to lead a nonprofit. By their very nature, nonprofits fill the gaps where the private sector is unable to provide a market solution and where government lacks the expertise or resources to efficiently meet community needs. These “gaps” tend to be where complex social challenges bottleneck and public policy evolves slowly. Nonprofits in the areas of education, healthcare, social services, arts and culture, natural resource stewardship, and faith-based initiatives have many and diverse stakeholders. The leaders and boards of nonprofits navigate through this complexity every day to provide or produce common goods that are critical to flourishing for the communities in which we live.

At Becker Capital, we believe the most effective way to enhance the communities we serve is to support nonprofits through partnerships. It is a privilege to steward the financial resources of a nonprofit that supports both immediate needs as well as long term financial aspirations. John Milton Lawrence observed, “The way to achieve your goals is step by step, you just need to build enough track, to be ahead of the train.” Through our consulting support of nonprofit clients, we provide resources that help “build the track” ahead of them.

Nonprofit leaders often find themselves overwhelmed by urgent demands, leaving little room to plan for the future. They grapple with human, technological, and organizational challenges without the luxury of surpluses of time or resources. Over the past year we have:

- Facilitated a strategic plan for a community arts association,
- Helped a community foundation develop capacity for planned giving,
- Led a healthcare foundation board through its rigorous self-evaluation,
- Guided a private school through an enrollment management strategy,
- Assisted complimentary nonprofits through the discernment of a potential merger,
- Created a multi-year strategy for a school to expand and professionalize their fundraising activities, and
- Developed a leadership succession plan.

While these were some of the discrete “projects” that we have successfully tackled, they have also deepened understanding of our clients and strengthened our partnerships. Building trust through meaningful engagement allows us to become allies to nonprofit leaders and boards, ready to support their endeavors and contribute to their audacious goals and wholistic success.

The Becker Nonprofit Forum Presents!

The Becker Nonprofit Forum supports nonprofit leaders by sharing knowledge, insights and expertise to encourage collaboration and create meaningful community impact.

One of the most difficult challenges for a busy nonprofit executive is to dedicate quality time to think broadly, plan, and prepare.

On June 28th, 2023, the Becker Nonprofit Forum held a Reputation Assessment, Protection and Crisis Preparation Workshop with 30 nonprofit partners in attendance.



ReputationUs' President and Chief Reputation Officer, Casey Boggs, is a highly rated and respected speaker specializing in reputation management and crisis mitigation for businesses and nonprofits. As an organization's image can change in the blink of an eye due to a crisis, Casey outlines actions to take to enhance, advance and protect reputations BEFORE a crisis defines an organization.

Casey Boggs facilitated discussions and provided processes for nonprofit executives and board to identify and prepare for issues such as cyberattacks, employee malfeasance, financial distress, on-property violence and social media dilemmas.

In addition to the workshop portion of the day, a professional photographer was on location to take complimentary headshots for those in attendance. Nonprofit partners and members of the Becker Capital team enjoyed an alfresco lunch ahead of the workshop and wrapped up the day connecting during happy hour.



42 Charitable Events Attended in 2023



- Saint Charles Foundation Saints Gala
- Deschutes River Alliance's Auction & Gathering
- Ducks in the Desert
- Blanchet House's Lend a Helping Hand Brunch
- Oregon Episcopal School's Blue Jean Ball
- Providence Hood River Memorial Hospital Foundation's Hearts of Gold
- Edison High School's Brilliance Benefit
- St. Mary's Home for Boys' Mending Hearts Luncheon
- Oregon Symphony's Gala 2023 In Harmony
- Legal Citizen of the Year Award & Celebration (a fundraiser for the Classroom Law Project)
- LifeWorks NW's 21st Annual Something to Talk About Breakfast
- Catholic Charities of Oregon's Celebration of Hope Gala
- JDRF's Portland Hope Gala 2023
- De La Salle North Catholic High School's Changing Destinies Luncheon
- The Campbell Course's 2023 Wine & Golf Ball
- Maybelle Center Family Reunion
- Providence Portland Medical Foundation's 25th Anniversary Celebration of Creating Hope
- Classic Wines Foundation's Salon de Vin
- St. Andrew Nativity School's Promoting Success Luncheon

LIFEWORKSNW



MAYBELLE
CENTER FOR COMMUNITY



- JoyRx's Golf For Joy
- Ronald McDonald House Charities of Oregon & SW Washington's Golf Classic
- Salem Art Association's Salem Art Fair & Festival
- High Desert Museum Rendezvous
- Timberline Daydream: A Celebration of Music, Brews & Bikes Benefitting OHSU Doernbecher Children's Hospital
- Ronald McDonald House Charities of Oregon & SW Washington's 2023 Hope-Raiser
- NW Association for Blind Athletes' Vision for Opportunities Fundraising Luncheon
- American Cancer Society's Making Strides Against Breast Cancer Walk
- JDRF One Walk
- Central City Concern's Compassion in Action Luncheon
- Alzheimer's Association's Walk to End Alzheimer's
- Catholic Youth Organization/Camp Howard's Champions of Faith Benefit Dinner
- Jesuit High School's Annual Financial Aid Luncheon
- Portland Japanese Garden's 60th Anniversary Gala
- ARCS Foundation Oregon STEM Celebration
- Boys and Girls Club of Bend's Flannel and Frost Dinner & Auction
- Family Access Network Luncheon
- De La Salle North Catholic High School's Fall Benefit Dinner & Auction
- OHSU Doernbecher Children's Hospital's Freestyle XIX
- Mount Angel Abbey & Seminary's Gathering on the Hilltop
- St. Andrew Nativity School's Harvesting Success Dinner
- Hillsboro Medical Center Foundation's Salud! To Our Health
- Providence Portland Medical Foundation's Festival of Trees



Becker Capital Employees Spent Over 2,700 Hours Volunteering in 2023





field day

We are implementing a community engagement platform, Field Day, to assist us with finding new opportunities to serve the community and its nonprofit organizations.

This platform drives social impact and employee engagement and allows for the creation of employee volunteer experiences that build connection, foster community, and strengthen culture in the workplace.

Utilizing Field Day, we are centralizing our approach to dedicating more time and resources to the particular causes that are important to our employees and community.

If you are a nonprofit organization, Field Day is free to join and is a valuable tool to help get the word out to the community about ways people can join the cause and lend a helping hand.

We are also expanding our philanthropic efforts by creating an annual day of firmwide volunteering in addition to the many smaller scale volunteering events we participate in throughout the year.

Learn more about Field Day by visiting www.fieldday.com.

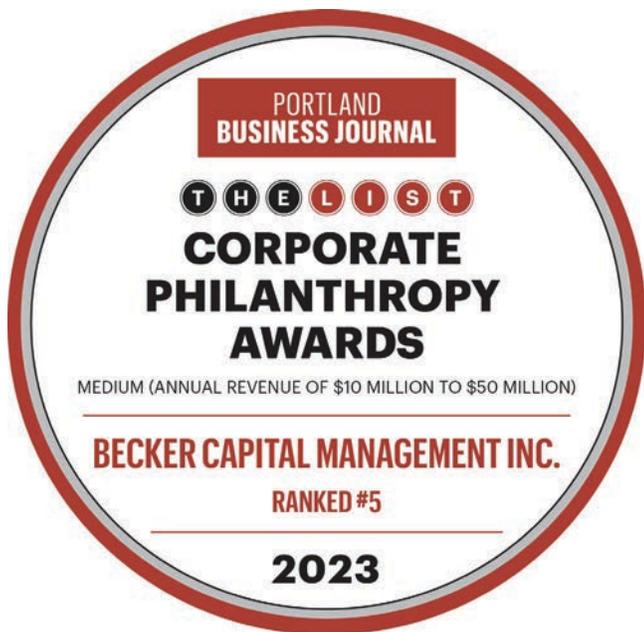


FIND VOLUNTEER EVENTS WITH LOCAL NONPROFITS

Find volunteer events in your community

Come together with other passionate people to get hands on with the causes that matter to you. Discover upcoming volunteer events with local nonprofits on Field Day.

[Check your city](#)



We are thrilled to announce that we were ranked the 5th Most Philanthropic Medium-Sized Company in the Portland Business Journal's 2023 Corporate Philanthropy Awards*.

This is our 13th year in a row being a recipient of the award and we are extremely grateful.

Congratulations to the entire Becker Capital team for all of their incredible philanthropic work!

*Rankings for Portland Business Journal's Corporate Philanthropy Awards provided by the Portland Business Journal. To generate the rankings for the Corporate Philanthropy Awards, the Portland Business Journal send surveys to thousands of companies in Oregon and Southwest Washington, asking them for the total hours of employee volunteer/pro bono work in Oregon or Southwest Washington as well as total cash and charitable contributions made. Companies eligible for consideration include any business with a substantial presence in Oregon and Southwest Washington.



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