



CITY CLUB
of **PORTLAND**

Annual Report

2022 – 2023



City Club Mission: *To inform its members and the community in public matters and to arouse in them a realization of the obligations of citizenship.*

2022–23 BOARD OF GOVERNORS

Caitlin Baggott Davis, President (resigned 11/22)
Darion Jones, President-Elect, President (resigned 4/23)
Chris Howard, Treasurer (resigned 12/22)
Steve Fleischman, Governor to 2024, Treasurer (resigned 4/23)
Louis Wheatley, Secretary (resigned 3/23)
Amira Streeter, Governor to 2024, Secretary
Julie Davis, Past President

Faith Addicott, Governor to 2025 (resigned 9/22)
Josh Carrillo, Governor to 2025 (resigned 4/23)
Felicia Tripp Folsom, Governor to 2025 (resigned 9/23)
Maja Viklands Harris, Governor to 2023 (resigned 4/23)
Leslie Johnson, Governor to 2023
Samantha Ridderbusch, Governor to 2023
Mark Stephan, Governor to 2024
Beth Tarasawa (resigned 4/23)
Rebecca Tweed, Governor to 2024 (resigned 11/22)

221 N.W. 2nd Ave., #213
Portland OR 97209
503-228-7231
info@pdxcityclub.org

www.pdxcityclub.org
<https://www.facebook.com/pdxcityclub>
<https://twitter.com/pdxcityclub>
Tax ID # 93-0140220

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1. A Third Year in Virtual

Programs remained virtual

Through our debate series, we continued to meet an important community need for voters seeking non-partisan information about issues and candidates in the primary election. Our “State of” event brought an elected leader’s message to the public. All of our events were free to the public and live in virtual spaces via KGW, our website, Twitter, Facebook, and YouTube, supported by a partnership with Pamplin Media.

Advocacy continued

The Club focused on city charter reform and money in politics, capitalizing on Portland’s once-a-decade charter review process. Advancing the recommendations of two research reports, our advocacy provided information, context, and public awareness to the effort, culminating in an electoral success.

Strategic Alignment advanced

The board of governors continued to work with Tusk Consulting to conduct an assessment and propose changes to the Club.

Membership declined

The membership numbers dropped from 552 to 380 at year-end.

Communications operated with one part-time staff member

Staffing dropped from 1.0 to 0.5 FTE at the beginning of the year. Members of the Board of Governors and other steadfast volunteers provided programmatic and administrative support all year.

Annual Meeting postponed

The annual meeting of membership took place September 29, 2023.

2. KEY NUMBERS

During 2022–23 the Club saw:

- No studies launched or completed
- 6 Events, 5 on-line and 1 in person
- More than 20 member-volunteers; one staff (0.5 FTE)
- 380 members at year-end
- 2 small foundation grants
- 4 corporate sponsors
- 96 individual household donors
- \$1,125,016 in endowments
- 44 Legacy society members

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3. RESEARCH

City Club of Portland is the last City Club in the country conducting citizen-based research. This unique opportunity brings citizens together to participate in rigorous research and analysis on important issues facing our city, region, and state.

Since 1920, City Club members have prepared over 1,050 reports on a variety of topics including land-use planning, health care, education, environment, government, transportation, taxation, and more. Committee members interact with key stakeholders and decision-makers, gain a deeper understanding of regional affairs, and influence public policy. Comprehensive reports are 8- to 12-month studies that serve as a resource for community leaders and citizens developing or evaluating policy initiatives and are frequently cited in state and local media. Shorter ballot measure studies occur as warranted by the state and local ballots and make recommendations to the membership and voters on ballot initiatives, referrals, and referendums. These are carefully watched by both political insiders and regular voters who know that our nonpartisan analysis isn't beholden to special interests.



Whether a comprehensive report or a ballot measure, the process is the same: a committee of City Club members conducts extensive research and drafts a report. After approval from the Research Board and Board of Governors, the report is introduced to the membership at a public forum. Following debate, City Club members determine by vote whether the committee's recommendations become official policy positions of the Club. If a report passes with two-thirds majority, it moves into an advocacy process that serves as a powerful force for civic change.

Research Board

The Research Board provides oversight and support for the Club’s comprehensive and ballot measure study committees. Board members identify study topics, develop study charges, serve as advisors to various study committees, and review and approve draft reports.

Comprehensive research reports and recommendations are the result of 8–12 months of focused interviews, hundreds of hours of independent research, weekly member-to-member discussions, and continual critical analysis of competing priorities. Ballot measure studies take place at an accelerated pace—closer to 4 months from start to finish. All of these activities take place in the pursuit of finding nonpartisan, unbiased consensus for a committee recommendation.

Research this year was dormant.

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4. ADVOCACY & AWARENESS

City Club of Portland's Advocacy and Awareness program helps make the recommendations of our research studies actionable. Members of our advocacy committees work with City Club staff to inform decision-makers, social interest groups and the public about City Club's adopted policy positions and to advocate for their implementation. Beyond promoting positive change, advocacy committee members develop their knowledge about policy and gain experience with a range of advocacy and awareness strategies and tactics.

The Advocacy and Awareness Board (dormant this year) provides consulting, guidance, and oversight for the advocacy committees with a member of the advocacy committees often participating on the Board.

City Charter Reform

In 2019 and 2020, City Club members approved two reports with recommendations for changing Portland's form of government and how Portlanders elect city council members. In December 2020, the board of governors approved an advocacy committee to advance those recommendations.

Following last year's "Charter Chatter" newsletter, "Charter Chat" events, and public education social media campaign, the final stage of the advocacy was hosting a debate on Measure 26-228. The measure succeeded at the ballot in November 2022, culminating decades of Club research and advocacy.

Other advocacy efforts continued, advanced by Club members involved in seismic preparedness and air quality.

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5. PROGRAMS



Through our 2022 fall debate series, City Club continued its long tradition and commitment to inform our members and the community in public matters and on issues of importance to the Portland metropolitan region, the state, and society as a whole. We hosted five general election debates, all available to watch on demand immediately after.

City Club’s “State of” event in May allowed members and public to hear directly how the new Multnomah County chair is addressing the immediate concerns of the county, while planning for the longer term. It constituted the Club’s first in-person event since early 2020!



Events Committee

Rebecca Tweed (chair)
Bobbie Regan (co-chair)
Maja Viklands Harris
Leslie Johnson
Jennifer Yocom

Due to the ongoing COVID-19 pandemic, all programming this year took place online until May.

2022–23 Events

Date	Title	Speakers	Description	Reach
June 30, 2022	Annual Membership Meeting	Louis Wheatley & Danielle Pacifico Cogan, from the board of governors, Moderators	Each year, City Club hosts an annual meeting to elect or welcome new governors, reconnect with City Club members, reflect on the previous year, and look ahead to what's next for our organization. We've served our community for 106 years and this next year might be our most important one yet. Thank you for being part of it!	144
Sept. 30, 2022	Portland City Council Position 3 Debate: Jo Ann Hardesty & Rene Gonzalez	Jo Ann Hardesty (incumbent) Rene Gonzalez (challenger) David Molko, KGW evening news anchor, Moderator	 <p>Portland City Council Fall 2022 DEBATE SERIES. Fri, Sept 30, Noon. Jo Ann Hardesty and Rene Gonzalez.</p>	10,460
Oct. 14, 2022	Portland Measure 26-228 Debate: Portland City Government Reform	Vadim Mozyrsky and Alisa Pyszka, representing Portland for Common Sense Government Sol Mora, representing Portland United for Change Charter Commissioner Becca Uherbelau. Rebecca Ellis, City Hall Reporter at OPB Moderator	 <p>Portland Ballot Measure 26-228 Fall DEBATE SERIES. Fri, Oct 14, Noon. Vadim Mozyrsky, Alisa Pyszka, Sol Mora, Becca Uherbelau.</p>	1,635
Oct. 19, 2022	Multnomah County Chair Debate: Sharon Meieran & Jessica Vega Pederson	Jessica Vega Pederson, commissioner Sharon Meieran, commissioner Johnell Bell, founder and CEO of Espousal Strategies, Moderator	 <p>Multnomah County Chair Fall 2022 DEBATE SERIES. Wed, Oct 19, Noon. Jessica Vega Pederson and Sharon Meieran.</p>	1,581
Oct. 21, 2022	Oregon Measure 114 Debate	Miles Rowe Pendleton, President, Eugene-Springfield NAACP Kevin Starrett, Director, Oregon	Join City Club of Portland, in partnership with KPTV Fox 12 Oregon, for an engaging debate on the pros and cons of Oregon Measure 114, Changes to Firearm Ownership and Purchase Requirements Initiative. If passed, the initiative would require a photo ID, fingerprints, criminal background check, safety training and a fee	3,261

		<p>Firearms Federation</p> <p>John Hummel, District Attorney, Deschutes County</p> <p>Pete Feryman, KPTV, Moderator</p>	<p>payment for permit, which would be issued by local law enforcement, to acquire firearms in Oregon.</p> 	
<p>May 9, 2023</p>	<p>State of the County</p>	<p>Jessica Vega Pederson, chair, Multnomah County Commission</p> <p>Byronie McMahon, Frankie Silverstein, and Sophie McEwen, Franklin High School students, Questioners</p> <p>Guadalupe Guerrero, superintendent, Portland Public Schools, Introducer</p> <p>Chabre Vickers, Chabre Vickers, director of equity, policy and communications for Prosper Portland, Interviewer</p>	<p>Multnomah County Chair Jessica Vega Pederson gave her first State of the County speech at Franklin High School.</p> <p>Topics covered included early childhood and family development, the county's role as public health authority, what's happening now to address unsheltered homelessness, and coordination between the multiple levels of government responsible for funding or delivering services in overlapping areas.</p> 	<p>822</p>

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6. MEMBER RECOGNITION



With the help of its member-volunteers, City Club accomplishes the work of an organization many times its size. No awards were granted this year.

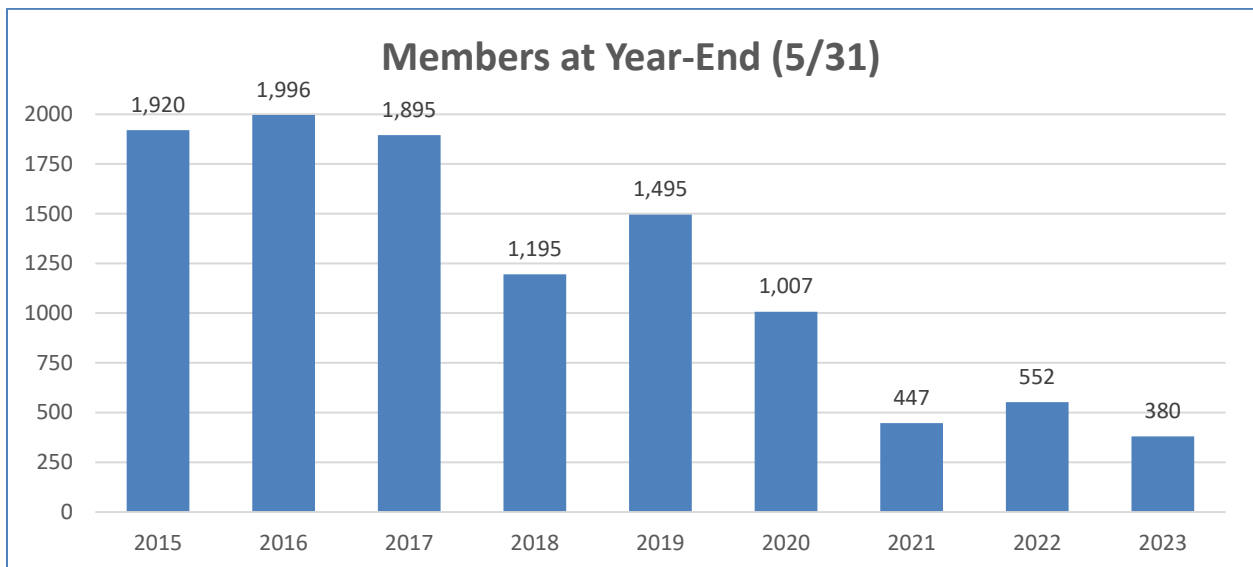
Executive Committee: Julie Davis, Caitlin Baggott Davis, Steve Fleischman, Chris Howard, Darion Jones, Amira Streeter, Louis Wheatley

Finance Committee: Chris Howard (chair, board liaison), Steve Fleischman (chair, board liaison), Josh Carrillo, Maja Viklands Harris, Ted Kaye

Nominating Committee: Leslie Johnson & Mark Stephan (co-chairs), Caroline Harris Crowne, Felicia Tripp Folsom, Chris Howard, Juan Martinez, Samantha Ridderbusch

Strategic Alignment Committee: Julie Davis, Felicia Tripp Folsom, Darion Jones, Louis Wheatley

Events Committee: Bobbie Regan & Rebecca Tweed (co-chairs), Maja Viklands Harris, Leslie Johnson, Jennifer Yocom



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7. DONOR RECOGNITION

When City Club was founded in 1916, it worked to solve problems for the common good. Over the last century, the City Club of Portland has grown and evolved to reflect the values and temperament of the times, but it has never strayed from the member-driven model that has enabled it to thrive for over 100 years.

Today, when a few powerful voices can dominate the political dialogue, more and more people are depending on organizations like City Club for unbiased information and thoughtful debate.

As members we are responding by creating programs and conducting research on the truly important issues in our community. We are convening people and organizations of divergent beliefs to listen, learn, and lead in crafting creative solutions and advocating for their adoption.

To remain true to our values of independence, City Club has always been member-driven and member-supported. However, membership dues cover only a portion of our operating expenses. To help support the rest, the Club relies on additional gifts from members.

a. Endowments

Established in 2008, the Research Endowment (at the Oregon Community Foundation) currently holds more than \$807,000. Annual distributions at 4.2% directly support the Club's research efforts (although none were taken this year). The initial funds were pledged and contributed by more than 100 members and friends in memory of Ogden Beeman, former Club president and champion of research, with a substantial match from his family and a bequest by Andy Linehan, former Club president.

Distributions from the Club's General Endowment (also at the Oregon Community Foundation), which currently holds more than \$317,000, support the Club's general operations.

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b. Legacy Society

Generous individuals and couples who have included City Club of Portland in their estate plans form the Legacy Society. They have made a commitment to the Club's long-term fiscal stability by increasing its endowments over time.

It's easy to join the Legacy Society. Provide for the City Club in your will or trust, or make the Club a beneficiary of life insurance or a retirement account. Then simply complete and send in the short [enrollment form](#). You will be recognized in all future listings of the Legacy Society, and you will help ensure the Club's success in perpetuity.

Sam Adams
Don Barney*
Ogden Beeman*
Sharon Brabenac
Jeanne C. Crouch
Arthur Goldsmith*
Dan* and Rusty* Goldy
Susan Hammer*
Alan Hart*
Ned Hayes*
Nancy Hedin
Peter Heuser
William Holmer
John Horvick
Leslie S. Johnson
Ted Kaye
Carla Kelley
Susan Kelly
Randal Kester*
Muriel* and Sid* Lezak
Andy Linehan*
Ned Look*

Greg Macpherson
Nichole June Maher
Gus Mattersdorff*
Pat McCormick
Roger J. Meyer*
Su Midghall
Leslie Morehead
David Quisenberry
Sharon VanSickle Robbins
Steve Rosenbaum
Mary Martin Rosenberg*
Steve Schell
Chris Smith
Julie* and Don* Sterling
Frances J. Storrs
Sue and Glyn Thomas
Les Vulsteke
Tamsen Wassell
Kurt Wehbring and Donna Dermond
Bob Weil*
Don and Janet Williams
James Zehren

(* deceased)

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c. 2022–2023 Leadership Circle

The Leadership Circle encompasses City Club supporters who are committed to ensuring that the Club remains the leading Oregon institution engaging citizens in public issues. Members of the Leadership Circle invest in the Club’s future with contributions of \$1,000 or more per year. We are grateful for the support of the Leadership Circle members listed below.

Julie Davis
Nancy Davis
Steven Fleischman
Ted Gilbert
Gregory H. Macpherson

Randy & Jan Miller
Tom & Chris Neilsen
Bobbie Regan
Christopher Smith &
Staci Paley

Mark Stephan
Frances Storrs
Phil Walsh

d. 2022–23 Annual Fund Donors

Mike Alfoni
Pippa Arend
Edward Averill
Lori Irish Bauman
Jay C. Bloom
Jenifer Boyce
Brian Campbell
Sara Chan
Marilyn Couch
Adam & Gina Davis
Andres de Lucca
Grayson Dempsey
Willis DeWitt
Taizoon Doctor
Steve Dotterer
Roger Eiss
Erin Esparza
Patty Farrell
Gerald D. Fox
Robert D. &
 Alice Eleanor Frost
Susan Gallagher
Richard Glassman
Michael W Graine
Angela Gusa
Sherry G. Hall
Bill Harris
Caroline Harris Crowne

Josh Harwood
Carol Hasenberg
Suzanne Hayden
James Joseph Hearn
Ashley Henry
Dennis Johnson
Ted Kaye
Tom Kelly & Barbara
Woodford
Kayla Kennett
Korleen Kraft
Scott Langley
John Lundeen
Andrea MacLeod
Linda Mantel
Chrissy Mcnair
Peter Miller
Meg M. Niemi
Robert Noche
Richard Perkins
Brooke Geer Person
Felice Pierce
Michael C. Ponder
Elsa Allgood Porter
Mac Prichard
Patrick O. Quinton
Samantha Ridderbusch
Dianne Riley

Carol Rose
Eve O. Rosenfeld
John Russell
Scott Sanders
Kathleen Ann Scanlan
Christine Soland
Whit Spencer
Patsy Stephenson
Beth Tarasawa
John Thomas
LaVonne Wood Treat
Felicia Tripp
Angela Uherbelau
Rian vanden Hooff
Gail VanGorder
Sharon VanSickle-Robbins
Benjamin Walters
Lisa Watson
Lori Webb
Susan Weedall
Nancy Werner
Louis Wheatley
Todd Wolf
Miles Edward Woofter
Betsy Wright
Doug Zenn
Jaroslava Zoubek
Suzanne Zuniga

The challenges of compiling such lists can introduce unintended mistakes, which in no way diminish the Club's gratitude for its members' support. The Club regrets any errors or omissions and encourages contacting staff with any corrections.

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8. CORPORATE & FOUNDATION SPONSORS

Corporate Supporters

Intel Corporation
NW Natural



The Standard Insurance Company
Samuels Yoelin Kantor LLP



In-Kind Corporate Supporters

FastechSolutions



Foundation & Other Supporters

Ben Hormel Harris Foundation
Marie Lamfrom Charitable Foundation

Wy'east UU Congregation

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9. FINANCIAL REPORTS

Statement of Activities For the years ended May 31, 2022 & 2023

	2023	2022
Support and Revenue		
Contributions & grants	\$58,133	\$88,373
Bequests & endowment gifts	–	15,000
Membership dues	47,540	67,869
Program service revenue	–	–
Investment income	(3,118)	(1,935)
Net realized & unrealized gains	(15,614)	5,203
Loan Forgiveness	–	54,907
Other income	5,443	1
Total support and revenue	\$92,384	\$229,419
Expenses		
Program services	\$71,685	\$122,325
Management & general	131,612	52,704
Fundraising	36,216	9,485
Total expenses	\$239,513	\$184,514
Change in net assets	(\$147,129)	\$44,905
Net assets		
Beginning of year	\$1,250,416	\$1,205,511
End of year	\$1,103,287	\$1,250,416

Notes: The Club's *operating* results were a *surplus* of **\$14,436** in 2021–22 (after reflecting the benefit of a PPP loans) and a *deficit* of **\$110,842** in 2022–23.

The Club usually secures a full financial audit every four years. The 2018–19 fiscal year's financial statements were audited by Kern & Thompson. Members may receive a copy of those financial statements by contacting the Club offices.

Statement of Financial Position
 May 31, 2022 & 2023

	2023	2022
Assets		
Cash & cash equivalents	\$21,005	\$95,087
Accounts & grants receivable	—	—
Prepaid expenses & deposits in transit	3,145	2,715
Property & equipment, net	4,306	—
Endowment Investments (at market)	1,125,016	1,156,732
Total Assets	\$1,153,472	\$1,254,534
Liabilities and Net Assets		
<i>Liabilities:</i>		
Accounts payable	\$185	\$4,118
Deferred revenue	—	—
Accruals	—	—
Loan	50,000	—
Total liabilities	\$50,185	\$4,118
<i>Net assets:</i>		
Unrestricted—undesignated	(27,749)	77,664
Unrestricted—board designated	1,000	1,000
Temporarily restricted	389,267	430,983
Permanently restricted	740,769	740,769
Total net assets	\$1,103,287	\$1,250,416
Total Liabilities and Net Assets	\$1,153,472	\$1,254,534

Operating Results History 2017–2023

	<u>2017-18</u>	<u>2018-19</u>	<u>2019-20</u>	<u>2020-21</u>	<u>2021-22</u>	<u>2022-23</u>
	<small>Jun '17 - May '18</small>	<small>Jun '18 - May '19</small>	<small>Jun '19 - May '20</small>	<small>Jun '20 - May '21</small>	<small>Jun '21 - May '22</small>	<small>Jun '22 - May '23</small>
REVENUES						
Indiv. Contribs. / Ann'l Fund	60,144	53,673	47,413	33,969	39,791	25,331
Corporate Sponsorships	37,500	70,382	20,884	31,757	34,246	16,301
Foundation Funding	112,809	128,991	69,511	1,300	2,000	18,750
Membership	117,511	126,356	98,005	64,421	67,869	47,540
Program Revenue—Net	14,064	(3,620)	(15,431)			
Gala Event Revenue—Net	69,857	89,311	(887)	19,120		
Special Events—Net	(1,190)	546	1,900			
PPP Forgiveness Accrued			55,905	19,650	35,257	
Designated Funds	5,263	6,361	6,362	6,423	6,416	6,750
Endowment Draw	38,596	38,476	38,977	39,441	12,449	12,984
Miscellaneous Income	25	80	64	3	1	14
	<u>454,578</u>	<u>510,556</u>	<u>322,703</u>	<u>216,084</u>	<u>198,029</u>	<u>127,671</u>
EXPENSES						
Personnel	293,157	339,571	287,259	5,645	76,915	31,581
Professional Services	22,002	19,211	33,561	26,055	53,595	165,398
Rent + Equip	73,494	65,135	54,421	25,227	5,092	8,868
Telephone & Tech	5,133	15,505	13,031	8,518	5,477	5,590
Insurance	4,728	4,591	4,779	4,915	4,977	5,153
Printing/Copying/Postage	3,599	1,730	2,291	345	3,481	903
Programming Support	22,235	30,817	15,715	21,148	24,749	13,540
Marketing	323	30	1,240	989	2,108	1,658
Grant-Specific Expenses	21,163	6,600		7,500		
Bank Fees/Finance Charges	14,391	11,944	6,499	3,979	2,629	1,893
Other (10 accounts)	7,634	11,395	10,275	3,143	4,569	3,928
	<u>467,859</u>	<u>506,527</u>	<u>429,071</u>	<u>107,464</u>	<u>183,593</u>	<u>238,512</u>
NET -- Surplus / (Deficit)	<u>(13,281)</u>	<u>4,028</u>	<u>(106,368)</u>	<u>108,620</u>	<u>14,436</u>	<u>(110,842)</u>

These amounts exclude in-kind gifts/expenses, gains/losses on investments, gifts and bequests to endowments, and depreciation, and adjust for PPP loan receipts/releases of restricted funds and endowment distributions.

ENDOWMENT FUNDS SUMMARY

	General Endowment	Research Endowment
May 31, 2019	\$279,530	\$625,302
Additions	0	0
Distributions	(12,043)	(26,934)
Gain/(Loss)/Expenses	2,686	9,976
May 31, 2020	\$270,173	\$608,344
Additions	0	0
Distributions	(12,170)	(27,271)
Gain/(Loss)/Expenses	88,714	223,123
May 31, 2021	\$346,717	\$804,196
Additions	0	15,000
Distributions	(12,449)	0
Gain/(Loss)/Expenses	1,433	1,836
May 31, 2022	\$335,701	\$821,032
Additions	0	0
Distributions	(12,984)	0
Gain/(Loss)/Expenses	(5,632)	(13,101)
May 31, 2023	\$317,085	\$807,931

The Club's endowments are held by the Oregon Community Foundation (OCF) in its main long-term investment pool. The Club is also the beneficiary of three designated funds at OCF (Sterling, Goldy, and Rosenberg), not shown here.

Annual distributions from the endowments support the Club's operating budget and, in the case of the Research Endowment, the Club's research function within the operating budget. No Research Endowment distributions were taken in 2021–23.

Currently the distribution rate set by OCF is 4.2% of the average endowment balance over the previous 13 quarters, adjusted for additions.

10. STAFF

The Club's Executive Committee served in the role of executive director during the year.

Treasurer Chris Howard and past treasurer Ted Kaye managed all office and financial matters, as well as membership functions.

The Club had two part-time employees: Stacey Rice, program strategist (until August) and Kayla Kennett, communications manager (for the full year). Dan Rivas worked part-time on contract for communications support.

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