

# EXECUTIVE SUMMARY

Oregon is a vast state, with increasingly diverse urban and rural communities. Historically and today, the state has experienced geographic, racial and cultural divides that communities have worked hard to overcome. A nonprofit and philanthropic infrastructure has evolved to tackle pressing economic, educational, environmental and health issues in the state; recently, advocates have won some impressive victories. Yet wide disparities remain for Oregon's dynamic Native American, Black, Latino, Asian American, immigrant and LGBTQ communities.

Over its 40-year history, The Oregon Community Foundation (OCF) has crafted a statewide structure with regional offices and extensive volunteer and donor networks to support urban and rural communities. As the state has become more diverse, OCF has attempted to respond, for example, by establishing a Latino engagement initiative. Today, OCF is the largest foundation in the state, with \$1.5 billion in assets, and has new leadership that is positioning the foundation to be more responsive. The team has shepherded a new strategic plan and carried forward an equity, diversity and inclusion (EDI) process that, together, solidify OCF's intent to become more strategic, drive systemic change and prioritize the needs and voices of those suffering the greatest disparities in Oregon.

Philamplify's extensive research, informed by OCF documents, nonprofit surveys and more than 60 stakeholder interviews, found much to praise in the continuing legacy of OCF's statewide culture of volunteerism, robust donor engagement, bridge-building with diverse Latino communities and new leadership. OCF is striving to infuse EDI into all aspects of its work, exploring opportunities to take

more advocacy positions, expanding mission investing and engaging in rigorous and continuous evaluation and learning.

Yet more remains to be done. Currently, OCF dedicates relatively low proportions of total funding to grassroots strategies that address equity such as advocacy, organizing and civic engagement. Moreover, Philamplify's research found that many LGBTQ leaders and leaders of color have reported being excluded or neglected by the foundation. It is an institution they have long viewed as "cautious," "impenetrable" and a "gatekeeper" to its donor advisors. These leaders do not yet see the fruits of OCF's current equity and inclusion efforts in their communities. Those closest to OCF see a slow moving ship gradually being steered in a new direction, and they urge the foundation to speed up and put more force behind its motion, so that it can help lead Oregon to become a truly equitable and inclusive state for all residents.

OCF is indeed taking steps to become a more inclusive, agile, strategic and adaptive grantmaker. Connecting the OCF "family" of staff, board, volunteers and donors to social change organizations and making greater allocations of its myriad resources (discretionary, donor-advised, mission investing) to nonprofits led by affected communities that organize and advocate for equitable systems, would be impactful and tangible signs of its commitment. Increasing transparency and communication about its progress on all these fronts would help stakeholders better understand where the foundation is on its journey and what lies ahead for the communities OCF most seeks to benefit and engage.

## FINDINGS

**1. OCF's statewide structure and grantmaking presence are widely regarded as innovative and effective at serving rural regions. This structure is still adapting to respond to diverse racial, ethnic and LGBTQ communities.**

The foundation achieves an active statewide presence through regional offices, an open community grants process and an extended network that includes OCF board of directors, donors, regional leadership councils, project advisory boards and volunteer grant evaluators. OCF's distributed staffing and community engagement efforts are unique among community foundations. However, stakeholder feedback indicates they have yet to fully embody the foundation's commitment to an inclusive OCF "family" that is representative of and culturally competent in its relations with diverse communities.

**2. OCF's leadership and staff are giving thoughtful attention to the foundation's EDI commitments. Despite these efforts, many stakeholders, particularly leaders of color and LGBTQ leaders, are frustrated by the slow pace of progress after what they perceive as long-term underinvestment.**

OCF is credited with creating a regional Latino Partnership Program (LPP) in 2002, which has grown in scale and scope over time. But the program's resources are still modest compared with overall foundation assets, and the perception of many leaders of color and LGBTQ leaders is that OCF has been and still is largely inaccessible. Community grants support social service, education and arts organizations, with little allocated for constituent-led groups. OCF has embraced equity, diversity and inclusion goals throughout its operations and is beginning to measure its progress against specific benchmarks.

Some stakeholders praise the growing diversification of the board. Others are unaware of its EDI work or, if they are, see little evidence yet of change.

**3. OCF pursues equitable, systemic change grantmaking primarily through special initiatives and funder collaboratives. The foundation provides limited support for marginalized communities to advocate and organize on their own behalf.**

OCF runs its own initiatives and participates in funder collaboratives to support equitable improvements in education, dental health, arts education and economic vitality. These efforts seek to engage their participants in changing systems, and some, such as the Chalkboard Project, have shown signs of making an impact. Largely missing from the foundation's strategies is support for grassroots organizing and policy advocacy by the communities that experience inequities.

**4. OCF's robust and creative donor engagement program is praiseworthy. Yet this does not dispel the perception among underresourced social change organizations and other nonprofits that donor-advised funds (DAFs) are mysterious, opaque and guarded by cautious foundation "gatekeepers."**

OCF proactively engages donors. Its staff members connect donor advisors to community grant applications, invite their support for special initiatives and offer educational events where donors can connect with staff, professional advisors, other donors and nonprofits. Despite these convening efforts, many grantees are mystified about how to access DAFs. For under-resourced communities of color and other constituency groups, donors represent an important potential resource, but they believe OCF staff are too cautious about social change to make these connections.

- 5. Under new leadership, OCF is changing its risk-averse reputation to become nimbler and bolder, and stakeholders see opportunities for the foundation to take greater public leadership roles on equity issues.** OCF takes pride in its role as an advocate on state policy matters and is retooling to be more agile in this arena. Recently, the foundation has been credited with its role in championing children's dental health. The CEO's background in state government, in both the legislative and executive branches, is another asset that many people want to see OCF use to support its equity and system change goals.

## RECOMMENDATIONS

Philamplify urges The Oregon Community Foundation to adopt the following recommendations, informed by extensive feedback from its stakeholders in Oregon, to more effectively support not only communities of color and social change causes, but all nonprofits and communities in the state:

- 1. Continue and build on the effective practices that enable the foundation to serve geographically diverse constituencies and a range of issues across the state, including providing more discretionary core support and multi-year grants.** Utilize the tremendous social capital and community knowledge represented by OCF's various volunteer bodies to meet the foundation's systems change and equity goals. It can do this by leveraging the leadership councils more strategically and deepening the diversity of all of its volunteers to include marginalized populations and knowledgeable social justice leaders. The foundation is already expanding the Community Grants program's capacity building guidelines, but can explore other ways to make its discretionary grant amounts as large, consistent and flexible as possible, especially for smaller organizations and those led by affected communities.
- 2. Embed social justice in the foundation's grant-making and fund more grassroots organizing and advocacy to advance equity and other systemic goals aligned with the foundation's strategic priorities.** Make specific commitments to fund more social change, particularly among communities of color, LGBTQ groups and others facing inequity. Ensure community grants can serve as an access point for these types of applicants. Explore how community organizing and advocacy can support existing systemic change efforts; for example, OCF could fund parent organizing as a way to undergird and inform OCF's various education initiatives. Engage with peer funders on collaborative opportunities to support such work.
- 3. Be bolder in public leadership and advocacy as an institution, especially on equity-related policy issues. OCF can follow the lead of constituency-run organizations fighting for equity in determining which issues would benefit from OCF's public advocacy.** Take full advantage of the momentum and work OCF has undertaken to grow the foundation's internal structure and capacity to drive systemic change in priority areas, while developing the nimbleness to respond to strategic opportunities presented by affected constituencies. This could include conducting or funding research that supports pro-equity policy campaigns, speaking out on behalf of pro-equity legislation and rallying OCF's extended "family" to do so as well.

**4. Build on OCF's strong commitment to learning and evaluation and improve communication by publicly sharing OCF's EDI framework, benchmarks and data on its progress. Create transparent and consistent feedback loops with community leaders to ensure the foundation is on track with improving relationships and building an equity-focused organization.**

The foundation has grown a robust research and evaluation department and has begun to track valuable data such as demographics of volunteers, donors and populations served. OCF's internal EDI goals and measures are comprehensive and incorporate most of the recommendations for equitable philanthropy provided by the Coalition of Communities of Color. OCF can improve its communications by publicly sharing its EDI plans, data and a list of grants on its website as well as updates on its progress and learning as it implements its EDI framework. Specifically, assemble and share data on how much funding (from all OCF sources) is not only benefiting communities of color, LGBTQ and other targeted populations but also supporting organizations whose staff and board are led by such populations. Dialogue frequently with these communities about the foundation's EDI efforts, both to exchange information and improve the process.

**5. Expand OCF's efforts to diversify donors, engage them on equity issues and connect them to culturally specific organizations and other constituent-led groups working for systems change.**

Create strategic opportunities for donors to actively participate in advancing the foundation's goals for equity, diversity and inclusion. Develop donor training programs on social change and equity, including the value of investing in (c)(4) as well as (c)(3) organizations.

Consider creating a fund to support culturally specific organizations working on systems change, which also could enable grassroots organizations to access "rapid response" funds to deal with unanticipated policy issues that arise.

**6. Continue experimentation with various mission investing tools, especially ways they can support the foundation's EDI goals, and share learnings with the community foundation sector to encourage more widespread use of these approaches.**

OCF can expand its nascent leadership on mission investing by dedicating more staff capacity and growing the proportion of its assets devoted to these strategies. It can be an advocate within the community foundation sector for impact investing that advances equity and builds vibrant urban and rural economies.