

THE OREGON COMMUNITY
FOUNDATION

CAN IT BUILD A
STATEWIDE LEGACY
OF EQUITY
AND INCLUSION?

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philamplify

honest feedback to improve philanthropy



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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.

OVERVIEW OF PHILAMPLIFY METHODOLOGY

NCRP has developed an assessment tool for foundations that addresses the strategic practices outlined in *Criteria for Philanthropy at Its Best* and *Real Results: Why Strategic Philanthropy Is Social Justice Philanthropy*. The former provides a set of evidence-based benchmarks that foundations can use for effective operational, grantmaking and leadership practices. The latter argues that foundations must be both strategic and just to maximize impact. Strategic and just philanthropy goes beyond having clearly aligned goals, strategies and methods to measure impact. It also means considering the explicit beneficiaries of the foundation's grantmaking, a systematic process to gather input from affected communities to inform the foundation's priorities and work and a steadfast commitment to ending inequity by investing in systems of change.

NCRP began applying this assessment tool to diverse foundations in 2014 with its Philamplify initiative, which provides candid feedback to many of the largest funders in the United States through comprehensive foundation assessments and spurs dialogue in the sector about how to maximize impact on systems and equity. In early 2015, informed by research and interviews with 20 sector leaders and experts in community philanthropy, NCRP adapted the Philamplify methodology to assess community foundations. Our benchmarks for community foundations examine, in particular, the foundation's role as a community leader, its engagement with diverse donors to advance community goals and its relationships with grantees, residents and other community constituents.

A comprehensive, nuanced review of foundation goals, strategies and practices using NCRP's Philamplify lens shows how strategy and justice can be aligned to boost a foundation's impact in communities that are most affected by inequitable structures and need philanthropic investment. Defining "strategic social justice impact" is complex largely because there is no singular or universal definition of "social justice." This means that NCRP assessment staff are intentional and adaptable in understanding and applying the assessment tool.

KEY QUESTIONS

The assessment addresses these key questions:

Overall Goals and Strategy

- Are the foundation's goals and strategies likely to benefit or empower underserved communities? Is the foundation applying an equity lens or analysis to its asset development, grantmaking and public leadership? Is it addressing disparities in outcomes for the issues or constituencies it prioritizes?
- Which stakeholders and what sources of data and best practices have informed these goals and strategies?
- Does the foundation pursue and invest in systemic change strategies? Does it support grantees' efforts to use the full range of advocacy tools legally at their disposal? Is the foundation leveraging its limited dollars in ways that advance social justice?
- Is the foundation looking at the ecosystem of actors within the sphere it seeks to influence and collaborat-

ing strategically with others?

Outcomes and Impact

- What social justice outcomes have been achieved in part because of the foundation's efforts?
- Do the foundation's efforts result in meaningful and lasting social change that can be felt in people's lives, particularly those most affected by structural barriers and burdens?
- Has the foundation worked across sectors and silos to achieve impact?
- Has the foundation effectively supported community-driven collaboration and coalitions among grantees and other nonprofits?
- Can the foundation and its stakeholders point to specific signs of progress?

Partnership with Community

- Does the foundation employ responsive grantmaking practices, such as providing coesupport and multi-year funding? How do the foundation's grantmaking practices advance or hinder achievement of its goals?
- How does the foundation go beyond grants to leverage its relationships, convening power, expertise and other assets to help community partners, donors and grantees achieve mutual goals?
- Does the foundation solicit feedback from the community, including peers, partners, donors, grantees and applicants and act on that feedback?

Partnership with Donors

- How does the foundation proactively engage donors to address community issues and needs, garner resources and advocate for systemic solutions?
- Does the foundation encourage community philanthropy equitably by reaching out to potential donors

from all resident populations, including underserved communities?

Other Effective Practices

- How do the foundation's investment and fund policies and practices support its own mission and the goals of its donors and grantees?
- Does the foundation operate in a transparent and ethical manner, with policies in place to prevent fraud and abuse?
- Is the board of directors large and diverse enough to allow for effective and ethical decision-making?

DATA COLLECTION AND ANALYSIS

To answer these questions, NCRP employed the following research methods:

- 1. Review of publicly available materials and internal documents.** NCRP reviewed publicly available foundation materials, e.g., 990s from the previous three years, annual reports and research publications. The Oregon Community Foundation generously shared internal documents such as the Equity, Diversity and Inclusion workplan, 2014 donor engagement survey, 2013 assessment of the Community Grants Program, grant evaluator handbook, board and staff demographics, grants history, program logic models, personnel policies, gift acceptance policy, investment policy and socially responsive investment fund policy. Any references in this report to internal, confidential OCF documents were included with written permission of the foundation.
- 2. Survey of recent and current grantees.** NCRP sent a link to our comprehensive survey on OCF's grantmaking

to a total of 711 competitive grantees that were funded in the last three years (2014, 2013, 2012). We received 276 completed responses, for a response rate of 39 percent, just under our target ratio of 40 percent. All respondents were guaranteed anonymity. We did not reveal the survey respondents to the foundation and any quotes included in this report are anonymous as well.

NCRP requested contact information for a sample of donor advisors and invited input on a survey tool for donors. The foundation declined this request and NCRP was unable to obtain enough contact information on its own to conduct a survey of donors.

3. Confidential interviews with stakeholders. NCRP interviewed a diverse group of individuals familiar with the foundation's work who could comment on its philanthropic efforts and results as they relate to our criteria. Stakeholders were identified by OCF and NCRP, with referrals also made by the stakeholders themselves. NCRP directly reached out to stakeholders who were suggested by their peers. NCRP requested interviews with OCF donor advisors and board members. The foundation declined to suggest individuals in these categories. Including foundation staff members, NCRP interviewed 61 individuals. Excluding OCF staff, 17 interviewees were people of color and 6 identified as LGBTQ. The stakeholder breakdown is as follows:

- 14 grantees.
- 15 OCF staff members.
- 9 Oregon foundation leaders.
- 11 OCF donors and volunteers.
- 12 other stakeholders (including government representatives and other nonprofit leaders).

OCF staff members are usually identified by name in

the report. All other interviewees have been guaranteed anonymity and will not be identified by name in the report or in any other communications. Although the foundation helped to identify some interview prospects, NCRP did not share the names of those actually interviewed with the foundation. Further, some interviewees were suggested through the research process and not revealed to the foundation, even as prospects. NCRP intentionally sought diverse perspectives on OCF's work. Unless otherwise noted, the quotes in the report are from the surveys and interviews conducted as part of the assessment.

4. Analysis and interpretation of data. Using qualitative evaluation tools, NCRP researchers used an iterative process to do a content analysis of open-ended survey responses and interview transcripts. The researchers analyzed data to code for assessment-related topics as well as other emergent subjects. The research team read through all qualitative data, identified key themes, compared notes and further refined the codes. NCRP's holistic analysis of closed- and open-ended survey responses, interview transcripts, third-party research and foundation materials produced the findings and recommendations included in this report. Quotes are provided to exemplify ideas that emerged from the evidence, typically in cases where multiple respondents raised similar points. In qualitative research, themes may be elevated in analysis even when a minority of stakeholders raises them, depending on factors such as the source of the feedback and the prevalence of a topic among a subset of responses. Thus, opinions from smaller subsets of people can still offer meaningful perspectives, especially given the foundation's statewide presence and its many roles and constituencies.

5. Relevant reports and news articles referenced throughout this document.

RELATIONSHIP WITH THE FOUNDATION

NCRP invited OCF's leadership to participate in shaping and implementing this assessment in the summer of 2015. The foundation's leadership decided to participate, thus providing NCRP with numerous foundation documents and facilitating NCRP's survey of grantees and interviews of foundation staff. NCRP conducted interviews with OCF's staff by phone during the winter of 2015 and early 2016. We provided a draft copy of this report to the foundation for review and feedback prior to its publication. The foundation provided extensive feedback via phone and in writing. Where appropriate, NCRP incorporated additional information provided by OCF in the final version of this report.

KEY DEFINITIONS

Culturally Specific Organization (CSO)

The Coalition of Communities of Color (CCC), an alliance of culturally specific community-based organizations in Oregon,¹ defines a CSO by the following characteristics:

- The majority of members and/or clients are from a particular community of color.
- The staff, board and leadership reflects the community that is served.
- The organizational environment is culturally focused and identified as such by members.
- The organization has a track record of successful community engagement and involvement with the community being served.
- The community being served recognizes the organization or program as a culturally specific organization.

Equity, Diversity and Inclusion (EDI)

In OCF's commitment to EDI,² OCF defines the terms as follows:

Equity promotes justice, impartiality and fairness within the procedures, processes and distribution of resources by institutions or systems. Tackling equity issues requires an understanding of the underlying or root causes of outcome disparities within our society.

Diversity refers to a broad representation of a community's demographic mix, taking into account elements of human difference focusing on racial and ethnic groups, sexual orientation, gender, gender identity, abilities and disabilities, religion, age and perspectives arising from different backgrounds.

Inclusion refers to the degree to which diverse individuals are able to participate fully in the decision-making processes within an organization or group. While a truly "inclusive" group is necessarily diverse, a "diverse" group may or may not be "inclusive."

BACKGROUND ON OREGON AND THE OREGON COMMUNITY FOUNDATION

Oregon is one of the top 10 largest states by geographic size, but it ranks 27th by population.³ Its landscape spans 400 miles from the Pacific Ocean to neighboring Idaho, spilling over rocky coastline, lush forests, high deserts and prominent mountain peaks.

With 36 counties and a population of approximately 4 million people,⁴ of which 69 percent live in urban areas,⁵ the state has a pronounced urban–rural divide. As an illustration, Multnomah County has over 735,000 residents, whereas Wheeler County has fewer than 1,500.

While Oregon now has one of the nation’s strongest economies, rural areas of the state have struggled to adapt and recover after decades of shrinking employment in wood product manufacturing and other industries.⁶ In addition to shifts in particular industries and the recession, Oregon’s tax structure (with no sales tax, property tax limits and an overreliance on income taxes) has left it vulnerable to chronic fiscal crises. This has resulted in budget shortfalls and deep cuts for public programs in Oregon, particularly in education. The Urban Institute found that, between 2000 and 2014, Oregon cut per-student spending for higher education by 51 percent, impacting college access and affordability.⁷ The state’s budget is expected to experience significant stress for 2017–2019 with rising costs of state-funded health care and public-employee pensions.⁸

Communities of color have grown rapidly in Oregon over the past three decades, creating a more racially and ethni-

cally diverse state. When NCRP published *Oregon Foundations: Private Sector Response to Public Needs* in 1981, more than 8 percent of the state’s residents identified themselves as Black, Native American, Hispanic, Asian American or Pacific Islander. In 2014, communities of color represented 23 percent of the state’s residents. A quarter of this population resides in Multnomah County and the Portland metropolitan area, while Latinos make up more than a quarter of the population in five more rural counties.⁹ Indeed, “rural” cannot and should not be equated exclusively with white communities.

Oregon is challenged by deep racial disparities entrenched in its history of systemic discrimination.¹⁰ In the 1800s, Oregon’s government passed exclusion laws aimed at deterring the settlement of “free” African Americans in the state, and an exclusion clause in its constitution remained until 1926.¹¹ Sovereign Native-American nations have fought for decades to retain rights to their ancestral lands in Oregon.¹² Portland, largely perceived as a progressive mecca today, was still considered “the most segregated and prejudiced city on the West Coast” in the mid-20th century.¹³ Even in recent years, Portland has been the whitest city in the West – unlike other metropolitan areas across the country.¹⁴ Decades of gentrification in Portland have created modern day racial divides, displacing entire African American communities and creating an affordable housing crisis.¹⁵ A string of xenophobic ballot measures in Oregon has sought to undermine immigrants’ rights to work and register to vote.¹⁶ And the ACLU reported that, since the

1970s, there have been more anti-gay ballot measures in Oregon than any other state.¹⁷

White supremacist organizing and violence continue to be prevalent in Oregon. In 2014, a massive federal investigation into white supremacist gangs in Portland and Multnomah County led to the arrest of 54 individuals.¹⁸ Moreover, across the country, armed antigovernment militias have grown by one-third since the election of President Obama,¹⁹ with the occupation of Oregon’s Malheur National Wildlife Refuge making national headlines for weeks in early 2016. Southern Poverty Law Center reports that the militia movement is fueled by factors such as “changing demographics driven by immigration, the struggling economy and the election of the first African-American president.”²⁰

In the face of such obstacles, a number of collaborative efforts have formed to catalyze change for racial equity in Oregon. The Coalition for Communities of Color (CCC), an alliance of 19 culturally specific community-based organizations, published a series of recommendations for philanthropy to advance racial equity in the state in 2012.²¹ The Racial Equity Working Group, a coalition of

nine non-partisan community-based organizations in Oregon, including CCC, publishes multi-issue analyses of the Oregon legislature’s commitment to racial equity. The reports, aptly titled *Facing Race*, identify key definitions and data on racial disparities and explore the history of racism in the state’s public policy.²² And the Urban League of Portland, a member of both groups, publishes *State of Black Oregon*, which features data, essays and case studies on longstanding inequities.²³ This assessment affirms the strong relevance to philanthropy of the findings and recommendations made by CCC, the Racial Equity Report Working Group and the Urban League of Portland.

Table 1 summarizes recent data by race/ethnicity, revealing stark disparities in income, poverty, employment, school success and access to health care in Oregon. Disparities in incarceration rates also persist: African Americans are 2 percent of the population but 8 percent of incarcerated Oregonians.²⁴ Data on discrimination also abounds; CCC noted that one-quarter of public school students of color were racially harassed in a 30-day study period, either at school or on the way to school.

Table 1: Key Data on Racial/Ethnic Disparities in Oregon²⁵

Race/ Ethnicity	Percent Population Estimate (2014)	Median Household Income (2014)	Percent Below Poverty Level (2014)	Unemployment Rate (2014)	High School Graduation Rate (2014–2015)	Percent Uninsured (2014)
White	77.0%	\$51,200	14.1%	10.2%	76%	12.1%
Latino/Hispanic	12.5	39,723	28.4	11.8	67	28.5
African American	2.0	33,505	36.1	18.1	63	15.7
Asian American	4.3	62,398	16.5	7.5	87	13.4
Native American	1.8	36,332	29.0	17.4 ²⁶	55	25.8
Pacific Islander	0.4	37,730	36.1	14.4	63	25.8
Oregon		50,521	16.7	10.5	72	14.4
United States		53,482	15.6	9.2	82	11.7

A vibrant ecosystem of social justice organizations and funders has made notable progress in addressing disparities within Oregon's increasingly diverse racial and ethnic communities. Grantmakers such as Northwest Health Foundation, MRG Foundation, Social Justice Fund Northwest and others, as well as key national funders such as the Ford Foundation, Open Society Foundations and the Carnegie Corporation of New York, have helped these constituencies advance significant policies that have made Oregon a nationwide leader. In 2015, Oregon adopted a new system to automatically register residents to vote using data from the Department of Motor Vehicles, the first of its kind in the country.²⁷ The state also passed the highest statewide minimum wage in the nation.²⁸

Over the last several decades, Oregon has seen a transformation of the state's funding environment. In 1980, Oregon's 130 foundations granted \$16 million. In 2013, 273 funders in the state awarded \$277.7 million in grants.²⁹ As noted earlier, Oregon philanthropy has grown in an environment of declining state resources resulting from 1990s anti-tax initiatives such as Ballot Measure 5, which limited property taxes and shifted public school funding from the local to the state level.³⁰

Emblematic of this growth is The Oregon Community Foundation (OCF), one of the few community foundations to serve an entire state. Among the 25 largest community foundations by asset size, only two other funders serve a statewide region.³¹ Established in 1973, OCF began with an initial contribution of \$63,000 from William Swindells Sr., who, like many great Oregon philanthropists, built his fortune in the harvest of the state's main natural resource: timber.³²

Thanks to the leadership of Swindells and his successors

at OCF, the foundation's most notable marker of success has been its fundraising. In 2008, assets hit \$1 billion and grants totaled \$56 million. A historic bequest of \$156 million from Fred Fields' estate in late 2011, the largest single gift ever received by the foundation, further expanded OCF's assets and grantmaking.³³

Today, OCF ranks eighth among the nation's largest community foundations by assets,³⁴ manages \$1.5 billion and hosts 1,900 funds. In 2014, the foundation awarded \$83.3 million, which includes grants to 4,800 nonprofits and \$7.5 million for 3,200 scholarships.

OCF's mission is to "improve the lives of all Oregonians through the power of philanthropy." The foundation identifies itself as a statewide leader and partner that concentrates its resources, expertise and networks in areas where it has "the best chance of making a genuine difference"³⁵ and "of having 'a lasting impact.'"³⁶

The foundation's second long-time president, Greg Chaillé, retired in 2011 after 24 years of transformational leadership.³⁷ Among many notable achievements, Chaillé oversaw OCF's vast growth in assets and its statewide expansion and recently co-authored a book of stories on prominent Oregonian volunteers, donors and nonprofits. Chaillé was succeeded by Max Williams, a former attorney, state legislator and director of the Oregon Department of Corrections. The foundation's board of directors includes 15 leaders from across the state. *The Statesman Journal* writes, "Through the years, the foundation board has been led by some of the most influential people in Oregon – Bend publisher Bob Chandler, Willamette Valley wood-products leader John Hampton and ... former Salem Mayor Sue Miller, who was the longtime leader of Family Building Blocks."³⁸

Under Williams' leadership, the foundation has taken new strategic directions, such as its public commitment to EDI. Currently operating under a three-year strategic plan for 2015–2018, OCF has five main initiatives: children and families; civic engagement; arts and culture; economic vitality; and education. Under these key focus areas lie numerous special initiatives and programs, such as the Children's Dental Health Initiative and Latino Partnership Program, which are detailed in more depth in later sections of the report. (See Appendix A for a detailed breakdown of the foundation's total and discretionary giving by issue area.)

To fulfill its vision of "a healthy, thriving, sustainable Oregon," OCF rests its work on five basic principles, as noted in its strategic plan:³⁹

1. We are committed to responsible stewardship of the funds entrusted to us by our donors.
2. We believe that creative and sustainable solutions come from people who work in partnership to address common needs and aspirations.
3. We give high priority to investments that create positive, substantive change and attempt to resolve problems at their source.
4. We recognize and respect Oregon's diverse regions and populations, and we seek to advance equity, diversity and inclusion through our programs.
5. We use research and evaluation to inform our programs and initiatives.

OCF uses both responsive and proactive grantmaking approaches to apply these principles. Responsive grantmaking means responding to the needs of a community consistent with the foundation's mission through an open application process. Proactive grantmaking targets specific issues with multi-year goals and typically uses a set process

to solicit proposals.⁴⁰ OCF has begun to direct more of its discretionary funds for proactive grantmaking, which includes the five key focus areas identified by the foundation. For example, over the course of one year, proactive grantmaking grew by \$4.3 million – from \$8.3 million in 2013 to \$12.6 million in 2014. Vice president of programs, Kathleen Cornett, explained:

"As discretionary funding has increased, we have moved from being exclusively responsive to a 50/50 balance between proactive and responsive work. We have seen over the years an increasing ability for the foundation to do proactive work to address issues arising in the state, in ways that a small grantmaker or responsive grantmaker can't always do. Now we have a number of proactive multi-year initiatives aimed at both specific problems, piloting solutions, researching and evaluating those experiments and figuring out how to do more policy work based on what we've learned."

Though the foundation has prioritized growth of its proactive grantmaking, among nonprofits and volunteers the foundation is best known for its Community Grants Program (CGP), its leading responsive grantmaking initiative. In 2014, CGP accounted for \$6.5 million, or 86 percent of total responsive grantmaking. The program is described more fully in Finding 1. (See Appendix B for an outline of the different types of funds and grants at OCF, including community grants.) All competitive grants (CGP and proactive) totaled \$20.2 million in 2014.

OCF emphasizes its dependence on generous Oregonians to grow its philanthropic efforts. OCF serves as a "big tent" for 1,165 donor-advised fund (DAF) advisors and manages more than 1,900 funds, including 439 scholarship funds. In addition to scholarship funds and endowment part-

ner funds for nonprofits, OCF offers five types of funds to donors:

- **Donor-Advised:** The donor actively participates in grantmaking to nonprofit organizations.
- **Field of Interest:** The foundation helps direct grants to causes or geographic areas identified by the donor.
- **Donor-Designated:** The foundation distributes funds annually to specific nonprofit organizations previously named by the donor.
- **Discretionary:** The foundation offers grants to fulfill its overall charitable mission and meet greatest current needs, including education, health and human and cultural services.
- **Pooled:** The donor contributes to one or more permanent, endowed funds established by the foundation.

From 2012–2014, OCF awarded \$170 million from donor-advised, field of interest, donor-designated, scholarships, endowment partners and supporting organizations such as the Gray Family Foundation.

In addition to its grantmaking and donor services role, OCF convenes volunteers and donors, takes policy stances on education and children’s dental health, and publishes research on issues in the state. For example, the foundation produces an annual report called *Giving in Oregon* that “tracks charitable donations to Oregon nonprofits as well as individual giving and volunteering by Oregonians.” OCF has a strong commitment to evaluation; it has logic models and evaluation processes for several of its special initiatives to ensure they are achieving their intended impacts.

To manage its many donor- and community-oriented functions and activities, the foundation has 85 staff members. Under CEO Max Williams, who has spent four years at the

helm of the community foundation, staff described OCF as undergoing a “period of transition” that has had an impact on staffing, public leadership and strategy. Williams explained:

“When I took over leadership, it had essentially been the same group of people leading the foundation for a number of years, many of them with 25-plus years’ time in the foundation or in a leadership role and grew [the foundation] over that time. ... If I had to focus where I’ve been spending a fair amount of time over the last few years, it is putting together a new leadership team for the organization. ... Part of what it will take for us to implement the new strategic plan is giving the new team energy, resources and support to grow in their space. ... A variety of things have resulted because of focus and leadership we’ve [now] got, [which is] starting to transform the foundation.”

Another staff member stated, “When I got here [a few] years ago, it was very difficult to bring up a new idea. It’s required more changeover in personnel, frankly. Now people are mixed up and not in lock step with how things were done over the last 20 years. The last CEO had been there for 25 years, and the culture was more bank-like than customer service oriented. It’s a new day.”

FINDINGS

The following findings provide insight into how well OCF has fostered continuity of community relationships and statewide presence while steering into new directions in its strategies and internal operations.

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 three main structures: regional offices, an open community grants process and a statewide network of donors and volunteers. OCF's "family" extends beyond staff, board and donors to include regional leadership councils, community grant evaluators and other advisory boards.

a. Regional Offices

The Oregon Community Foundation has created a regional office structure that enables it to have statewide reach and

OCF GETS HIGH MARKS FOR GRANTEE PARTNERSHIP

A key focus of NCRP's assessment is how nonprofits describe and rate their relationship with the foundation. This survey only reflects the views of current or recent grantees; it does not capture the opinions of rejected applicants or those discouraged from even applying for an OCF grant.

Of the 276 total survey respondents, 89 percent rated their partnership with OCF as "very" or "somewhat" effective and 9 percent rated it as "not very effective" or "completely ineffective."

Overall, many of the positive characteristics attributed to partnership with the foundation related to the application process and grant. The most frequent response when asked to choose the top five characteristics of effective partnership with the foundation was "alignment of goals and mission." See Graphic 1 for the other top responses.

The characteristic of the partnership most in need of improvement was "ex-

posure and connections to other funding sources." See Graphic 2 for the other characteristics most cited for improvement.

Beyond the grant, the kind of assistance grantees would most like OCF to offer in the future is for OCF to "facilitate exposure and access to other funding sources." See Graphic 3 for the other top responses.

Responses to open-ended questions highlighted the helpfulness of staff and the openness of Williams as a leader.

When asked what they would do differently if they were CEO of OCF, respondents' most frequent responses were grouped around the following themes [see Appendix D for more data from this question]:

- Increase grants access, size, consistency and flexibility.
- Improve OCF's relationship with the community and grantees.
- Exercise greater or more effective public leadership.

Responses from leaders of culturally specific organizations also indicated they would provide more flexible funding and improve relationships with nonprofits. In addition, they said they would provide:

- Greater grantee access to OCF donors and to other funders.
- EDI training for foundation board, staff, volunteers, donors.
- More funding for communities of color.

As detailed in Finding 2 (page 21), the legacy of discrimination and inequitable funding for communities of color persists in Oregon philanthropy, and while we cannot draw conclusions from this small sample, the data suggests that OCF could benefit from greater dialogue with culturally specific grantees to determine how their needs and experiences with OCF may differ from those of other nonprofits. ■

Graphic 1: Top 5 Characteristics of Effective Partnership with the Foundation

Characteristic	Response
Alignment of goals and mission	62%
Grant application/process	57%
Relationship with foundation staff	48%
Grant size	39%
Grant cycle and length of grant	31%

Graphic 2: Top 5 Characteristics of the Partnership Most in Need of Improvement

Characteristic	Response
Exposure and connections to other funding sources	38%
General operating support	32%
Networking and convening among grantees and donors	28%
Funder knowledge, expertise and role as thought partner	22%
Foundation receptivity to innovation and risk	21%
Relationship with foundation staff	21%

Graphic 3: Top 4 Types of Assistance Grantees Would Most Like OCF to Offer

Characteristic	Response
Facilitate exposure and access to other funding sources	75%
Connect interested parties to work on a common issue	51%
Provide technical assistance/capacity building/ professional development	51%
Provide support for strategic planning/evaluation	48%

respond to distinct community needs, particularly in more remote rural areas. The foundation organizes its work by eight regions (see Appendix C). Although more than two-thirds (58) of OCF staff are based in its Portland headquarters, regional directors operate offices in five other parts of the state, where cross-departmental staff oversee strategies for grantmaking, volunteer coordination and donor relations.

Many interviewees praised OCF for having successfully achieved statewide reach through localized relationships

and for serving rural communities so well. On the strengths of OCF’s statewide model, one peer funder reflected:

“Over the years, they have really focused on reaching out into other parts of the state for leadership both on the board of directors as well as invested in making sure that they are decentralizing the decision-making ... which has been to the benefit of the state. Not all top-down but bottom-up, more about community democracy and local communities making decisions about

what the needs are in local communities and making sure that that's where the funding is going, both from OCF discretionary funds as well as DAFs."

Donors also see the benefit, as one summarized:

"Being statewide gives them visibility to all that's going on. Geography matters, cultures matters, there are tensions. Being statewide gives you an ability to see where differences are, where needs are, recognize tensions, be strategic about what you do."

A majority of grantees surveyed for this assessment are satisfied with their relationship with the foundation (see sidebar on page 16), a testament to OCF's investment in regional and cross-silo staffing structures.

b. Community Grants Program

The Community Grants Program (CGP) is OCF's statewide competitive funding source and is open to any eligible Oregon nonprofit. There are two grant cycles each year, and up to 400 requests are submitted each cycle. Most of the 300 grants awarded each year go to small- and moderate-size nonprofits, with an average grant size of \$20,000.⁴¹ In 2014, \$6.5 million was allocated for "community grants," some of which comes from DAFs (up to 20 percent).

CGP has purposefully broad thematic areas to be responsive to local community needs and foster civic leadership and engagement across Oregon: 30–40 percent is allocated for health and well-being of vulnerable populations; 30–40 percent for educational opportunities and achievement; 15–25 percent for arts and culture organizations; and 10–20 percent for community livability, environment and citizen engagement.⁴² In addition to CGP, nonprofits can apply for funds from several other competitive grant programs.⁴³

Megan Schumaker, senior program officer for CGP, reports that approximately 40 percent of funds are awarded as multiyear grants, and while CGP does not typically award core support, the foundation considers discretionary capacity-building grants as a form of general operating support. She shared:

"We're helping nonprofits to strengthen their infrastructure. ... After the recession, we were getting so many nonprofits applying who wanted to expand their programs and we saw they needed to strengthen operations, not expand programs. We had to look at what we were doing and how we were unintentionally encouraging them to expand, so we changed our capacity building guidelines. ... It could be training for board, technology, strategic planning, evaluation or something like that."

The foundation conducted a yearlong assessment of CGP in 2013, including a survey of volunteers, donors, board members and nonprofits and interviews with culturally specific and rural organizations. As described later in this report, as result of the assessment, OCF has become more intentional about reaching out to and accommodating communities of color and other underserved groups in the application process. The foundation's equity, diversity and inclusion workplan and long-term goals for CGP show evidence of thoughtful progress.

c. Volunteer Network

In addition to praise for OCF's statewide presence and attention to rural issues, stakeholders lift up OCF's unique approach to community engagement through its volunteer network. The community foundation welcomes residents, including donors, to serve on its board of directors, advisory and leadership councils (LCs), Regional Action Initiatives and as grant evaluators. Over 1,700 citizen volunteers

draw on their personal, in-depth understanding of their communities to provide OCF with insight into local needs and opportunities.

The leadership councils were first created in the 1980s under the guidance of former OCF board chair, Bob Chandler.⁴⁴ Composed of 15–30 members per region, the councils help guide local grant priorities for the Community Grants Program, identify prospective donors and recommend future action. In 2001, the foundation's Latino Partnership Program grew out of a regional leadership council. (See page 24 for more about LPP.) Today, seven of the eight leadership councils are chaired by an OCF board member, creating an open channel for feedback between foundation leaders and residents.

On the role that the LCs play for the community foundation, Sonia Worcel, vice president of strategy and research, shared:

“[The LCs] serve a couple purposes, one of which is to provide us with information about what’s going on in the regions, but another purpose for us is to feed back information into the councils and from the councils to the regions about the work the foundation is doing across programs and initiatives. We use the LCs as one vehicle to update communities on the work of the foundation and get reactions and feedback on what we’re sharing, to help communicate our message and help us shape the work we’re doing based on feedback from communities.”

In 2009, the leadership councils “led a process to engage community members, focus on a local issue and fund successful strategies for change.”⁴⁵ Entitled the Regional Action Initiative (RAI), the councils began convening, publishing requests for proposals and making grants. Melissa

Freeman, director of strategic projects, recalls that “each committee got \$1 million and had to improve a problem in their region.” All of the RAIs selected OCF-aligned issues related to health or education, such as children’s dental health in the South Coast and Southern Willamette Valley, parenting education in Metropolitan Portland, and community school programs in Central Oregon.

A few stakeholders close to the foundation expressed a desire for deeper engagement of the leadership councils:

“I’m not sure how other leadership councils are engaged or utilized. [From] my experience on [a fairly active council]. ... I’ve always thought that OCF could use volunteers to a greater extent to serve their organization greater than they do.”

“[OCF] had meetings with the chairs of the leadership councils about how [they] can engage the leadership councils in a much more active way. People want to be challenged and not just come to a meeting. They see some meaningful opportunities to change their community for the better. [OCF hasn’t] been challenging them other than the Regional Action Initiative.”

Other vital actors in the community foundation’s family of ambassadors are volunteer grant evaluators (GEs) for the Community Grants Program and another grant program, the Reed and Carolee Walker Fund. Evaluators are often referred by staff members or other volunteers and are provided with an orientation and 75-page handbook to guide their assessments. Statewide trainings are also offered once a year to instruct GEs on how to review project budgets, read financial statements and represent the foundation. Every other year, OCF hosts a Statewide Leadership Gathering for its volunteers, donors and staff.

Several interviewees mentioned the valuable networking and convening this event provides. In 2015, OCF's nearly 100 GEs were awarded the Governor's Volunteer Award.⁴⁶

OCF seeks individuals with qualities such as curiosity, openness and intercultural skills to serve as GEs but writes that it "typically does not place evaluators who are professional grant writers, development professionals, or employed by nonprofits."⁴⁷ On what the experience offers, one volunteer and donor shared:

"We're allowed to choose the grants we evaluate, so I tried to go outside my comfort zone. It's a great way to learn about programs in the community that I wouldn't necessarily know about. One of the grants I evaluated several years ago was for a children's dental clinic. It's amazing how little you can know about a really important issue."

Our assessment found that many grantees enjoy authentic interaction and in-person site visits from these local volunteers and encourage OCF to keep this feature of its grantmaking. Sample survey comments included:

"The volunteer grant evaluator and the subsequent report to OCF is excellent."

"[OCF should] continue to rely on local or regional leadership and volunteers to help identify local issues and evaluate applications for merit."

"I would keep the community volunteer reviewers. They are what make the foundation special and unique."

OCF has brought a heightened level of intentionality to its volunteerism strategies to be responsive to equity, diversity and inclusion over the past three years. Yet a dozen LGBTQ and leaders of color and others surveyed and interviewed

for this assessment fail to see the benefit of these efforts. They critiqued the lack of diversity of race, ethnicity and class in the makeup of OCF's volunteer programs and raised concerns about the sensitivity of these volunteers to issues of race, poverty and social justice. One grant evaluator shared, "I think OCF perfectly reflects the culture of the white affluent community in Oregon, in terms of the history it has." On demographics, another stakeholder observed:

"The staff is well respected and experienced. The board is very connected to the Oregon community, with a caveat: It's connected to the powerful parts of the Oregon community. That's a plus and minus. That means it's plugged in – it knows what's happening, understands trends, knows people. That's all good and can make an organization effective. The negative is the board, staff and volunteers do not come from the communities we try to serve. And that's a bit of an overstatement because we serve all communities in Oregon. But, in terms of communities that lack political and economic power, they're not represented in the board, staff or volunteers."

Several interviewees expressed concern that OCF's GE orientations do not adequately train volunteers for competency in equity, diversity and inclusion. A handful pointed to long-term homogeneous GEs who do not have connections to culturally specific communities. Others described grant evaluators as "mostly white, educated retirees or older people with flexible time" who may be unequipped to discuss the unique challenges faced by communities of color. The requirement that grant evaluators not work at nonprofits, and the concentrated commitment of hours, may pose barriers to leaders of color and low-wealth residents who might otherwise be interested in participating.

While the foundation has initiated conversations with volunteers about equity and philanthropy, one grant evalu-

ator shared her observations from a statewide CGP training for four-dozen white volunteers:

“There was a moment when someone in the room from rural eastern Oregon, who had been an evaluator for 10–12 years, was like, ‘Well, in my community, we have a lot of Latinos moving to our community. They are immigrants and are having a hard time assimilating and getting work. A lot are living in poverty. So I should find their leaders and fund them to solve problems, but, from what I can see, there are no leaders in that community!’ She said this because they don’t look like leaders in her community. She is not connected to those communities. You need to hire some [cultural competency trainers] to do this right and put in a lot of time and resources. I didn’t see that commitment.”

Another knowledgeable stakeholder commented:

“They are so large and make so many of these tiny grants and do it across the state. They end up utilizing this cadre of volunteers to do site visits. I’m not totally opposed to using random people to do site visits. It makes me a little nervous. To the extent those folks are provided training, they are not trained around racial justice issues, you have to teach them about racial justice. ... I absolutely believe you can rely on partners for expertise but also have to build competencies on the inside.”

Many of the critiques outlined in this section are acknowledged in the foundation’s EDI workplan, yet infrequent public communication about its goals and progress hinders understanding by external constituents. In its workplan, the foundation outlines goals related to diversity of people and perspectives, cultural agility, effective community engagement and impact on equity and disparities.

One objective reads, “Provide regular and meaningful cultural competency education to staff, management, board members, leadership councils, committees and volunteers.”

Another objective states, “Recruit and retain diverse staff, management, board members, committees, leadership council and volunteers to more closely reflect communities we serve and to increase diversity in perspective.”

The foundation also has begun to track its demographics and provided NCRP with data on the makeup of its staff and board by gender, race/ethnicity and sexual orientation (see Appendix E). Demographic data on donors and volunteers are not yet available.

OCF can do more to ensure that its ambassadors are diverse, adequately trained and meaningfully engaged. Moreover, public transparency and honest conversations about the institution’s EDI work and goals would help stakeholders understand its efforts and provide real time feedback on its progress.

In sum, OCF has developed an extensive staff, Community Grants Program and volunteer and donor network that support statewide engagement and impact. The foundation’s satellite offices and approach to community engagement are unique among community foundations and should be applauded for their effectiveness. The use of volunteers supplements staff capacity and enables dedicated community members to further its mission. As this section and the next demonstrate, the foundation can more effectively represent and support the interests of the whole state by including more diverse and culturally competent voices in these structures.

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.

a. Key leaders of color and LGBTQ leaders perceive OCF to be largely “impenetrable.”

As the introduction to this report notes, Oregon has racism in its roots. Historically and today, people of color face enormous disparities in treatment, access and outcomes in health, education, employment and other measures of human development and well-being. Other populations have been marginalized as well, including LGBTQ communities.

Simultaneously, organizations seeking to end these disparities have been woefully underresourced for generations. NCRP studied giving to communities of color in Oregon 35 years ago. The 1981 report⁴⁸ examined the grantmaking of the 35 largest general purpose foundations in the state and found, “More than 8 percent of Oregon’s residents identify themselves as Black, Native American, Hispanic, Asian- American or Pacific Islanders, yet barely 1 percent of Oregon foundation dollars is specifically directed to minority programs.” Negligible funding (\$2,000 total) went to gay and lesbian serving organizations. It also noted, “Only two Oregon foundations reported having a member of a racial minority on their board of directors, and the number has since been reduced to one.”

In 2010 Grantmakers for Oregon and Southwest Washington (GOSW), with grant support from OCF and numerous other funders, commissioned the Foundation Center to analyze philanthropic spending by Oregon funders for communities of color in Oregon. The new baseline report, based on 2008 data, found that only 4.3 percent of grants (5.6 percent of grant dollars) explicitly benefitted racial or ethnic populations

in Oregon. Further analysis extrapolated that approximately 9.6 percent of grants (an estimated 10.9 percent of grant dollars) reached communities of color, even though they comprised 20 percent of the state population at that time.⁴⁹

Fast forward, an NCRP analysis of 2013 Foundation Center data on philanthropic giving in Oregon found that 5 percent of all grant dollars coming into the state served Oregon communities of color.⁵⁰ OCF funding for communities of color in 2012 and 2013 represented 3 percent of its total giving (both discretionary and DAF) in those two years.⁵¹

OCF noted that it and many other funders were not explicitly coding grants for populations served before 2015, nor including that information in grant descriptions; therefore, these Foundation Center data underreported giving to communities of color. In contrast, leaders of color contended the 2008 data actually over-counted giving because of the way grants were coded.

During 2011, in response to the GOSW report, the Coalition of Communities of Color (CCC) and Northwest Health Foundation convened a series of meetings with Oregon funders to develop a set of recommendations for philanthropy to strengthen giving and relationships with communities of color in the state. CCC’s platform for change asserted:

“The underfunding of communities of color represents a great missed opportunity. Instead of funders and communities of color partnering together to identify the greatest needs and to make strategic funding decisions, we have operated in silos that continue to produce deteriorating outcomes for Oregon’s most vulnerable communities.”⁵²

Several Oregon funders have taken these words to heart, including Northwest Health Foundation, Meyer Memorial

Trust and now OCF. Other regional grantmakers, including MRG Foundation and Social Justice Fund Northwest, were already supporting these communities.

While it sees itself as a data-driven organization and a knowledge center for giving in the state, The Oregon Community Foundation does not yet have internal data on its funding for communities of color; however, it will begin tracking populations served with its 2015 grants. An OCF staffer explained why:

“[W]e embarked upon this work with the seriousness and thoughtfulness that is due: we worked for several years (2011–2013 or so) with the Grantmakers of Oregon and Southwest Washington, many local and regional funders, and the Foundation Center on this issue. . . . We did not want to develop anything that was out of line with national standards and out of sync with what other foundations regionally would be doing so that our data can be comparable. . . . That work took several years, and in 2014, we were able to train our staff on the coding taxonomy.”

Even with its new coding system to track populations served, the foundation does not have a system for tracking grants to culturally specific organizations or a plan to do so. OCF is in the majority on this, unfortunately, as most foundations nationally do not track grantee diversity information.⁵³ Yet some foundations have been tracking the board and staff diversity of grant applicants for many years, such as the New York Community Trust, Catholic Campaign for Human Development and Social Justice Fund Northwest. OCF’s neighbor Meyer Memorial Trust first collected demographic information from grantees and applicants in 2013.

NCRP reviewed OCF’s discretionary grants list to identify giving to culturally specific organizations (see definition of

CSOs in the Methodology section), in order to distinguish between giving that *benefits* specific populations and giving directed to organizations *led by* those populations. NCRP also included LGBTQ-led organizations. We found that 3 percent of OCF discretionary grants and 6 percent of grant dollars went to CSOs and LGBTQ-led groups from 2012–2014, totaling \$2.8 million over three years.⁵⁴ In an interview, OCF president Max Williams said, “In grantmaking, we’ve had a 1.5 fold increase in the number of grants, 2.5 times in the last four years, that we’ve made to culturally led and culturally focused nonprofit organizations.”

Despite this growth, the perception among a dozen leaders of color and LGBTQ leaders we interviewed is that, historically through today, OCF has been a difficult foundation to gain access to, with several using the word “impenetrable” to characterize it. Even CSOs that receive funding from OCF believe that it is challenging to find an entry point, especially for social change organizations. A stakeholder observed,

“A number of our [coalition] partners came to me during OCF’s open call for proposals and were asking for best practices for how to get in the door. I don’t know how, other than through personal relationships. The complexity of OCF, it can be tough to figure out. Our partners are working in historically marginalized communities, so it’s a double whammy. People take an approach, submit a proposal and hope for the best. That’s a real drain on the resources of an [already underresourced] organization.”

In response to this characterization of exclusion and underinvestment, OCF provided NCRP with a list of examples of its grants and leadership supporting communities of color over the last four decades (see Appendix E). A few interviewees did cite specific early seed investments by OCF in an African-American and a Latino-led organization, for example.

OCF also questioned whether the foundation should be singled out among its Oregon peers for engaging in “active exclusion and marginalization,” but in fact, systemic marginalization is often not intentional. Several leaders of color described a historical pattern of cultural insensitivity by former OCF staff. One recalled being asked by a staffer how long he had been in the country (the leader was a U.S.-born Latino). Another said, “OCF staff would blame us for their not investing in our groups, telling us ‘You don’t have capacity’ or ‘You don’t have vision’ or ‘You’re not competitive.’ The common denominator was always race.”

Among LGBTQ and interviewees of color who are also current OCF grantees, the foundation is often seen as taking a transactional approach to the relationship, rather than looking for long-term partnership.

b. Stakeholders praise OCF’s leadership in creating the Latino Partnership Program, which has grown in scale and scope over time.

Although the Community Grants Program and DAFs have not offered easy access for communities of color overall, OCF has invested increasing resources in the state’s Latino communities over the last 15 years. In 2002, the foundation’s Northern Willamette Valley Leadership Council (NWV LC) initiated a Latino Partnership Program in response to Latino business leaders who alerted OCF to their community’s challenging circumstances. OCF realized that it knew little about this community and began regular conversations and meetings with Latino leaders in the NWV region. Two Latino community leaders interviewed by NCRP recalled how impressed they were when foundation staff and board reached out to them initially and asked to learn more about the opportunities and challenges for this growing demographic.

According to an early participant, the initial goal of LPP was simply to “bridge the Latino community with the broader community”. Today LPP seeks to “strengthen Latino leaders and organizations, support education that encourages Latinos to become more integrated and influential in their communities and help forge strong ties between Latino and non-Latino communities.”⁵⁵

The Latino population of Oregon grew 63 percent from 2000 to 2010;⁵⁶ during that time LPP expanded to southern and central Oregon and Umatilla County. A 2011 evaluation of LPP commissioned by OCF and conducted by the Western States Center found that it had made progress in all of its stated goals, such as providing direct technical assistance to more than 30 Latino organizations and their leaders, fostering parent engagement in public education, engaging more than 1600 people at community forums, breaking down barriers between Latinos and whites through a “Community Bridges” program, and helping Latino nonprofits access other funds both within OCF (i.e., the Community Grants Program) and from other foundations.

The evaluation also cited a number of challenges and recommended a range of improvements, including a shift from use of part-time consultants to permanent staff, more transparency about OCF’s commitment and accountability to the Latino community and to fostering Latino leadership internally, stronger bridge building between Latinos and whites, more strategic use of resources for leadership development and improved internal and external communications.

OCF responded to the report’s critiques, hiring a full-time project director, Roberto Franco, in early 2013. In May 2013, the board approved a statewide plan for LPP that honed the above goals into specific objectives, including within OCF’s education, scholarship, and community grants programs.⁵⁷

Franco described the recent evolution of LPP this way:

“Three years ago, with advice of different groups, having learned from past 10 years what it would take to take partnership to different levels, the foundation created the statewide program . . . We’ve revised focus areas and fine-tuned our work with Latino groups and organizations, but we’re still looking at focus areas of the partnership that started 12 years ago, leadership development and bridge building. Not only between the foundation and Latino organizations or representatives of the Latino community but also among Latinos themselves. [T]here are different groups of Latinos in Oregon. There are first-time arrivals and long-term, second- and third-generation immigrants, young people that came here at a young age and grew up here, young people that were born here, so bridging these different groups in the community, and convening those conversations among that diversity in Latino community.”

As the focus has expanded in scale and scope, so have the grant resources allocated, from \$350,000 per year in 2013 to \$1 million in 2014 and \$1.5 million in 2015. Sonia Worcel explained in an email, “These grantmaking figures include grant dollars from the LPP budget, but also include dollars from elsewhere (donor-advised dollars, for example) and also include grants made out of other grant programs that Roberto [Franco] helped shepherd that are aligned with LPP’s goals (such as culturally specific parenting education grants made through the Oregon Parenting Education Collaborative, as one example).”⁵⁸

Latino leaders interviewed for the Philamplify assessment who were closest to LPP praised the changes. An active participant gave this assessment:

“Are they actually including participants in those communities devising the plan? Yes, they are absolutely doing that. Are they investing money in Oregon? I think a million and a half in 2015, so yes, they are funding us and listening to us. Do we have quantifiable evidence [of impact]? Some yes and some no. Are they effective? I only spend time outside of work hours doing volunteer work that I know will be effective.”

An example this person gave is Voto Latino, an LPP project to encourage Latinos, especially young adults, to run for public office. Yet a few Latino leaders expressed concerns that grassroots leaders were not fully engaged in planning future directions for LPP, and the program is less responsive to community needs than it could be. They note that civic engagement efforts are not necessarily tied to systemic goals. And some of OCF’s Latino-led grantees seem to be disconnected from LPP.

In fact, OCF has been responsive to systemic issues affecting Latinos and immigrants. As described in Appendix E, the foundation led an effort to attract other funders and donors to pool funds so nonprofits could respond to new Obama Administration programs, Deferred Action for Childhood Arrivals (DACA) and Deferred Action for Parents of Americans and Lawful Permanent Residents (DAPA),⁵⁹ intended to extend legal status for two segments of the undocumented immigrant population.

A second critique is that LPP is not funded adequately enough to have meaningful impact. A few interviewees commented on what they perceived to be the nominal amount of OCF resources going to LPP, in the range of \$300,000 per year. One stakeholder said:

“The Latino initiative is underresourced. Roberto Franco is put in a situation where he’s trying to create some-

thing with nothing. ... [H]e's working with other program officers and communicating with them to make them aware of Latino issues in the state. If that's going to be a program, it needs more resources."

This misperception is understandable because it is not easy to find public information about OCF's investment in LPP. The 2014 annual report says that LPP funding doubled but does not indicate total giving to Latino causes. Also, total discretionary funding for the program differs from total funding overall that supports the LPP goals. For example, in 2014, \$340,000 of discretionary funds supported LPP grants (of which \$90,000 came from Gray Family Foundation), yet overall investments aligned with LPP goals totaled \$1 million. Even so, the 2014 level of \$1 million is 2.2 percent of 2014 discretionary and DAF grants (which totaled \$44.7 million). Yet Latinos are at least 12 percent of the state's population.⁶⁰

According to Franco, many resources across the foundation are now targeted to LPP's goals:

"Out of all of the major grantmaking programs, the Latino community and LPP is a priority. [We] do tell people and groups that apply for funding that those are two priorities at the foundation. That's sending a signal to groups looking for funding that we look at proposals carefully especially when we know that region and know there's a big presence of the Latino community. One of our focuses is around education, and ... the LPP is targeting our grantmaking on educational programs working closely with Latino students. In some of [OCF's] initiatives, [we have] made a decision that we would become intentional in providing funding for Latino-led organizations or programs."

c. OCF developed an EDI statement and has taken steps internally to enhance capacity to achieve its goals.

LPP's evolution and current integration into other parts of OCF reflect the foundation's broader commitment to embrace equity, diversity and inclusion in its grantmaking and internal operations. In November 2014, OCF's board adopted an EDI statement, committing OCF to:

- Appreciate the dignity and worth of all individuals.
- Invite honest and dynamic discourse on the issues of equity, diversity and inclusion.
- Develop within our own operations and policies a spirit and discipline that advances equity, diversity and inclusion. Nurture an open and welcoming working environment.
- Promote the dismantling of structural and cultural barriers to individual achievement.
- Use our resources toward the goal of making Oregon a place in which all people fully realize their aspirations.
- Advance public policies and practices consistent with these commitments.⁶¹

A month later, OCF released its 2015–2018 strategic plan, which further affirmed its equity goals and pledged to:

- Ensure grant and scholarship dollars are distributed across Oregon.
- Track diversity of populations being served and adjust program outreach and methodology where disadvantaged populations are underrepresented.
- Engage diverse populations in addressing important community needs.
- Expand the reach of the Latino Partnership Program and partner with other diverse communities.⁶²

OCF staff and board had been working on EDI-related

issues since at least 2012 and already had begun making changes prior to these public commitments, including staffing LPP and prioritizing equity in the Community Grants Program guidelines.⁶³

Philamplify interviews with OCF staff conveyed both serious intent and concrete steps toward making the EDI statement a reality. President and CEO Max Williams took over the helm of OCF in early 2012, a little over a year after the GOSW report on underfunding for communities of color came out. Williams entered the scene as conversations between CCC and OCF were underway and was told that CCC was critical of OCF, which he learned was viewed as “stodgy and inaccessible.” He joined a cohort of foundation CEOs exploring EDI, convened by Philanthropy Northwest with the support of the D5 Coalition.

In addition to his ongoing commitment to the CEO equity cohort, Williams has made a number of internal moves over the last four years. These include commissioning a consultant’s EDI assessment, conducting staff trainings, hiring Sheila Murty as vice president of operations (who helps drive the EDI process internally), developing an EDI framework (not publicly available) with concrete objectives and measurable outcomes within and across departments, creating an internal EDI committee to monitor progress, and hosting an Opportunity Fellow (now called Momentum Fellow) through a Philanthropy Northwest program to support “on ramps” into philanthropy for professionals of color.

Murty emphasized that OCF’s EDI work “is meant to be a comprehensive approach that does not have EDI as stand-alone but as an integrated part of how we do our work.”

In interviews, several staff mentioned specific ways they have begun applying an EDI lens to their work:

- Developing education and arts grant programs that support organizations working with children of color, low-income and rural children, and non-English speaking populations.
- Gathering baseline data on the diversity of investment managers and vendors.
- Reviewing hiring and non-discrimination policies.
- Developing language and communications tools to engage and bring together donor advisors to discuss and address disparities.
- Attracting more diverse potential donors through events, such as Women Give: Creating Impact with Your Money.
- Ensuring RFPs for new programs specified that OCF was seeking proposals from organizations serving communities of color, low-income and rural communities, such as dental health and the Oregon Parenting Education Collaborative. (More information on special initiatives is on page 33.)
- Spending more time out in the field to network and better understand communities.
- Developing data-tracking systems to monitor demographics of grantees and applicants, as well as OCF staff, donors and volunteers.
- Adjusting RFP and grant review processes to enable funding to culturally specific organizations through community grants and changing application forms to discern populations served; asking applicants to demonstrate their understanding of an underserved community’s needs and capacity to meet those needs.
- Revising grant evaluator handbook and diversifying this cadre of volunteers.

Megan Schumaker, a senior program officer, stressed that, “We are always paying attention to what foundation practices might be problematic, and then we are quick to

change if we see something is not great.” Schumaker offered an example:

“I was attending this session and the primary focus was for funders. The one thing that jumped out at me was this woman said ... a lot of nonprofits lean on culturally specific nonprofits for help, except culturally specific nonprofits are getting overburdened. I wrote that down in huge letters and immediately added this to our handbook and talked to our staff and volunteers about it. If you see a mainstream nonprofit saying that they are going to partner with a culturally specific nonprofit to better serve a specific population, then make sure there is money in the budget for that culturally specific nonprofit.”

Several staff noted that diversity for them begins with Oregon’s rural-urban divide. Kathleen Cornett, vice president for grants and programs, observed:

“If you have been following the news, many of our rural communities feel isolated, beleaguered, defensive, like they have no voice. That’s an element of EDI work that we are very familiar with – rural communities and the people in them. We are seen positively in rural communities, but [we are looking at] how to help them in a more strategic way.”

Melissa Freeman, director of special projects, echoed, “I think our biggest diversity is between urban and rural communities. You add in socioeconomic status and communities of color, and it makes for a much richer conversation.”

Reflecting on OCF’s EDI efforts to date, Williams observed:

“Every organization is different, and everything is more complicated than you think it’s going to be, and there

are all sorts of under-the-surface challenges with this work. I learned that you’ve got to be open, willing to make efforts and even sometimes [fail]. You have to say you’re sorry if what you’re trying to do isn’t producing the results you wanted, and you can’t let people say you’re not going fast enough or haven’t done enough. You have to keep trying and keep making progress. There isn’t a magic answer. Lots of people are willing to help ... but ultimately you have to carry the vision, and it’s an expectation you have to set not only for yourself but for your leaders and their teams.”

d. However, many community leaders see little evidence yet of change.

Williams may well have had the voices of our interviewees in his ears when he said, “You can’t let people say you’re not going fast enough.” Interviews with a dozen leaders of color and LGBTQ leaders revealed the contrast between their own perceptions of progress on equity, diversity and inclusion and the perceptions of other stakeholders and of OCF staff. Most of these leaders praised Williams for his thoughtful and concerted efforts to shift an institution that many describe as a slow-moving ship, yet they remain impatient for signs of change, urging him to indeed go faster.

One community leader spoke passionately about the urgency for OCF to act:

“[LPP is] a good start and I would want to go a lot deeper in terms of how grantmaking is being done. ... How can they increase the knowledge of disparities in the community and fund accordingly? They get nervous about that. They need to act on equity. More children go hungry in Oregon than anywhere else. [Meanwhile] *The Washington Post* named Portland the best foodie city.”

Although Williams did not indicate this himself, it is apparent from the external interviews we conducted that he has an informal kitchen cabinet of advisors, including leaders of color he consults periodically about the EDI work who feel they can give him honest feedback about their perception of OCF's progress. Those who have observed him up close are impressed by his honesty and openness as a white male leading a mostly white institution toward greater equity, diversity and inclusion.

Several people of color recounted experiences with Williams that captured his efforts to grow as an EDI learner and leader. One Latino stakeholder described being in a meeting where two advisors were trying to explain the leadership development needs of their community:

"[The] advisory council was trying to unpack what leadership means in Latino communities versus other communities, and it was clear that [two people] weren't being heard, and it was wonderful how Max was able to let us know. ... [He said] 'I understand that we don't know the particular bullet points you're trying to make about leadership given your culture versus our culture, and I'm just some white guy trying to learn, and I want to learn effectively and will ask you to repeat that again, but make it for a white guy who really cares, and you don't need to be so polite.' ... I think it made clear that he was going to make sure we get to that transparency. Whatever advocacy needed to happen for communities of color, he was going to be there and advocate for us and [know there] would be certain things that the white community would never know about us and that was okay."

Yet numerous others – including grantees, peer funders and other community leaders who are fighting for more equitable systems in Oregon – see few if any signs of

change beyond Williams' genuine intent. For many of those we interviewed, the foundation remains inaccessible. Stakeholders recounted ongoing barriers to access for CSOs, among the Community Grants Program, other initiatives and donor-advised funds – even as OCF staff indicate they have changed these program to be more culturally inclusive. For example, although OCF staff have reported making their program requirements more flexible, one grantee commented:

"OCF had early childhood funding available and wanted you to use certain kinds of curriculum only. We had a culturally specific model that we developed on our own with parents, that is very grassroots. It became a great model that we see high outcomes for, yet we would only be able to qualify for this funding if we used someone else's model, so we opted out of applying because there was not flexibility that we could use an alternate model if we got the same outcomes."

The attention to geographic balance, attending to rural as well as urban constituencies, can overshadow racial and other disparities, which may require different kinds of grants (i.e., advocacy and systems change) to have impact. As one grant evaluator explained:

"Because the foundation needs to and works hard to represent a state that is very disparate, for example, serving urban Oregon and rural Oregon is two hugely different things ... maybe we need to be clearer in recognizing that some forms of lack of access, some communities experience a bigger gap, and it's not all equal. It doesn't mean we're not serving everybody, but it might mean they need to recognize, for example, African-American populations in Oregon have less access to power than others ... just as an example. I think

if OCF would want to be more effective, it would need to be a little more direct and specific about what effectiveness looks like.”

OCF has a delicate line to walk, as those in less racially diverse but often economically depressed rural areas call for a greater OCF presence in their communities, while more urban constituencies of color see longstanding neglect in OCF’s own Portland backyard. In Philamplify interviews, some OCF staff placed a greater emphasis on rural diversity than other types when talking about EDI. A peer funder expressed frustration with this tendency in the region’s philanthropy:

“[D]iversity looks extremely different out here in terms of how people talk about it and address it, their commitments, how they see it. Sometimes bizarre and enlightening actually. Often both. Enlightening that people are so far ahead in dialogue around transgender or queer issues and rural diversity issues, but when it comes to race and class, I feel that it’s avoided so much.”

As alluded to in an earlier finding, the Community Grants Program appears to rely on a cadre of volunteers who traditionally have been mostly white and had little familiarity either with social justice organizations or with communities of color. While OCF is striving to diversify its pool of volunteers and also train them in cultural competency, these perceptions linger. As one leader of color said, bluntly, “OCF tries to involve tons of people, but it’s the wrong people. They don’t know who to reach out to.” A peer funder noted that nonprofit leaders of color continue to complain of “horrible, racially charged incidents” with OCF’s volunteer grant reviewers.

In addition, as several interviewees asserted, they believe OCF staff hides behind the donors as an excuse not to fund more equity-oriented systems change. And they don’t see

evidence that OCF is trying to connect donors to communities of color. One peer asserted:

“OCF is so large and basically impenetrable. They operate with so much funds. They talk about how their funds are encumbered; that they do what donors are interested in or have committed their funds to. They say they don’t have the ability to flex and be more responsive. I don’t think they are a QE2 [ocean liner] as much as they profess it.”

Yet some donors, including a few interviewed for this report, were in fact strong advocates for equity and systems change and urged OCF to further embrace these causes. Because social justice leaders and funders know that OCF has some like-minded donors, this reinforced their perception that the staff are the cautious ones at the foundation and that progressive OCF donors don’t see OCF as a good vehicle for giving to social change. Culturally specific organizations that use organizing and advocacy to push for greater equity don’t see any evidence that OCF has become more open to funding social change in ways that a handful of other regional and national foundations will.

CSO leaders also expressed an overall frustration with the lack of data about how much OCF funding is going to equity and systems change organizations and efforts – across community grants, special initiatives and DAFs. Many constituents don’t even know that OCF has made a formal EDI commitment. Several people noted that Meyer Memorial Trust, Northwest Health Foundation and the United Way of the Columbia-Willamette have all embraced equity grant-making, sharing their processes, goals and diversity data with the public. One stakeholder’s comment was typical:

“They started this work a while ago. I haven’t seen really anything from them. There is one thing in seeing

results and consequences. There's another thing about communicating the work that you're doing. If you take Meyer Memorial Trust, they have been very public about that process, even when groups on the ground weren't seeing consequences of that process. [The] Oregon Community Foundation has not been that communicative about the [equity] work."

Frustration at the information vacuum and slow pace of change – seemingly negligible to some – is compounded by past and continued experiences of cultural insensitivity reported by more than a dozen interviewees. Several recalled instances of racially offensive statements and micro-aggressions by previous staff. Although Williams has turned over a number of key positions and brought in new leadership, the foundation still struggles to attract more diverse staff. OCF leaders realize they have to overcome negative perceptions among potential applicants of color in order to make more diverse hires.

OCF vice president Sheila Murty acknowledged that as OCF moves forward on many EDI fronts – cultural competency, more diverse hiring, better data-collection systems – communication will be important as well: "There is an opportunity for us to tell our stories. It doesn't always mean sharing all of the successes, it also means sharing challenges."

In four decades, The Oregon Community Foundation has grown from one of the smallest grantmakers in the state to the largest, in both assets and annual giving. The fact that a significant proportion of its grantmaking is constrained by donor wishes does not matter to many community leaders. They hold high expectations for the largest funder in a state with limited philanthropic resources, expectations that the foundation will partner with them to meet community needs and build on their strengths.

The experiences of culturally specific organizations and social change leaders are by no means monolithic. Individual leaders have offered both praise and critique for OCF in their interviews. Among 20 LGBTQ and leaders of color, many see signs of progress in a more diversified board, expanded resources for Latino-focused organizations and committed staff leadership. Yet this section has detailed strong, lingering perceptions of exclusion as well. Whether other Oregon foundations have elicited similar feelings or not is beside the point. This assessment is focused on one foundation and its quest to be more inclusive and to advance equity more effectively. As OCF grows its capacity and cultural competence to do so, strong communications and feedback loops with communities facing disparities, especially about how foundation resources are allocated to advance equity, will be critical to the foundation's success.

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 funds advocacy and structural change primarily through some of its initiatives and funder collaboratives. (See Appendix A for a table of key initiatives, programs and funding breakdowns.) Its 2015–2018 strategic plan affirms:

"In these key focus areas – education (including early childhood programs), economic vitality, arts and culture, and children's dental health – OCF is dedicating not only grant dollars as 'change capital,' but the resources of its board, staff and volunteers to convene allies, research issues, develop policy and lead strategic partnerships for meaningful change in Oregon."

FUNDER COLLABORATIVE SEEKS STATE POLICIES TO SUPPORT TEACHER AND SCHOOL LEADER EFFECTIVENESS

The Chalkboard Project was launched in 2004 by Foundations for a Better Oregon's six founding foundations⁶⁴ to research and pilot promising practices that will transform Oregon's K–12 public school system, so that it is high quality, has stable funding, elevates student success and eliminates disparities in student achievement. Chalkboard's leaders assert that elevating teacher and school leader effectiveness is key to achieving these goals.

Chalkboard extensively engaged teachers, administrators and parents, as well as OCF's leadership councils, when developing its approach. Founding and current executive director Susan Hildick described the process:

"We did that a lot in the early years and that is part of what has been giving us credibility now. We did an 18-month civic engagement process across the state and then polled deeply and did a lot of focus groups with key groups of Oregonians to make sure we were staying where we felt parents and educators believed there were opportunities to change things. Now we are more focused on bringing these messages to thought leaders and policy leaders. We use pilot projects on the ground and then scale with state money the things that work. So now our audience is much more policymakers who control where the dollars go."

Indeed, advocacy to advance state education policy is a core strategy, informed by the project's research and practice, in particular the CLASS project. CLASS provides mentoring and coaching to school districts that can demonstrate collaboration among the superintendent, school

board and teachers' union, to develop new career paths for teachers, meaningful performance evaluation, relevant professional development and alternative compensation models. CLASS has achieved demonstrable improvements in student achievement.⁶⁵

Since 2007, Chalkboard's legislative successes have included:

- State funding for a teacher peer mentoring program.
- A directive for the state to develop statewide teacher and administrator performance standards.
- Establishment of the School District Collaboration Grant Program, which supports CLASS expansion by incentivizing volunteer collaboration among teachers and administrators to explore innovations for both groups in career pathways, evaluation processes, compensation models and professional development.
- Creation and funding of a Network for Quality Teaching and Learning, which acts as a statewide umbrella for teacher professional development opportunities.

From Max William's perspective, Chalkboard does play an important role with its limited dollars:

"I look at Chalkboard Project, which has been a long-term investment for a number of Oregon foundations. ... In districts where it has implemented programs with research and evaluation, we've seen dramatically positive improvements. It was patient money that had to wait, and eventually we were able to make policy changes. Now there is a line item in the

state budget for teacher effectiveness that is mostly driven by the foundation and Chalkboard, so our little bit of money that we invested over years is now leveraging probably \$30–\$40 million a year in state money to build the model in [other] parts of the state. It's an example of how this work can get impactful at the policy level. There's ... risks in this space, but the rewards are relatively high if we navigate successfully."

In late 2013, Chalkboard conducted an equity, diversity and inclusion audit, and in 2014 it developed an EDI framework and three-year workplan, which contains specific goals, strategies and actions. Hildick reported:

"We ran three pilot programs that touched 65 percent of school kids in the state, so we had deep penetration, and we are seeing opportunity gaps closing across some groups but not all. And so we spent the last three years in a deep space about race and inequity and how to propel change in those areas. There has been a policy, strategy, plan, trainings with staff and board and an annual assessment of strengths and weaknesses around this. We need to do this work deeply and well so we can better understand how to move the bar."

Chalkboard updated its EDI plan in 2015, marking its progress. ■

OCF works with other sectors to advance its goals, including other funders, educators, government and business. Stakeholders especially praised OCF for its work on dental health, early childhood education and K–12 issues. (See Finding 5 for a discussion of OCF’s role as a direct advocate, distinct from its advocacy and systems change grantmaking.)

Among stakeholders contacted for this assessment, the Chalkboard Project, the sole initiative of Foundations for a Better Oregon (FBO), was one of the most cited examples of OCF’s positive systems change efforts. During the three-year grant period studied for this report, OCF gave close to \$1.2 million to FBO. (See the Chalkboard Project sidebar on page 32.)

Several of OCF’s other special initiatives focus on advocacy and systemic change to varying degrees, in some cases promoting the alignment of actors within a system to drive service improvement and, in other cases, seeking state policy change:

- **Children’s Dental Health Initiative** – In response to high rates of dental health disease, two of OCF’s Regional Action Initiatives began programs to increase children’s access to dental services in 2009. OCF co-hosted a 2011 summit on dental health, leading to the formation of the Oregon Oral Health Funders Collaborative. In 2014, OCF launched a five-year statewide initiative to partner with other grantmakers to engage OCF donors, volunteers, grantees and partners to raise awareness, fund community-based prevention and “provide statewide leadership and advocacy on evidence-based prevention strategies, as well as infrastructure and workforce policies.”⁶⁶ This includes “supporting legislation that will improve oral health for all children in Oregon; and funding necessary research to strengthen the rationale for policy changes.”⁶⁷ OCF
- also supports grantees to work with the healthcare system to increase access to care, and OCF works with the Oregon Health Authority and provider groups to advocate statewide for better data collection, more coordinated care and increased access and services for children.
- **Oregon Parenting Education Collaborative (OPEC)** – Launched in May 2010, it includes OCF, Meyer Memorial Trust, Collins Foundation, Ford Family Foundation and Oregon State University. Based on evidence that parenting education and support leads to better outcomes for children, the Collaborative’s goal is “a stronger statewide system of programs, information and support for all parents, with a focus on programs reaching parents of children prenatal to age six.” OPEC provides small grants (e.g., \$30,000), usually in three-year cycles, supporting “evidence-based, culturally specific curricula” for organizations targeting specific parent groups, such as teen parents, parents with criminal justice involvement and culturally specific groups such as Burmese refugees or Somali immigrants. An OCF evaluation found that the demographics of the 14,500 parents participating were more diverse than for the state as a whole: more than 30 percent were people of color, with Hispanics the largest such group (20 percent); 68 percent received services targeted to low-income households.
- **Prenatal to Grade 3 (P-3) Alignment Program** – This new initiative seeks to align early education providers, public schools and parents to ensure children’s academic success, focusing on key transition points from prenatal through third grade. The project seeks to form collaboratives that bring parents into decision-making processes and openly address issues of equity and power. OCF also works closely with the state’s P-3 effort to support and advocate for this work.

- **K–12 Student Success: Out-of-School Time (OST) Program** – This five-year, \$13 million initiative funds community-based programs to improve attendance and school success exclusively among middle-school students of color and rural and low-income students. Some culturally specific organizations have been awarded grants. Parent and youth engagement are measurable goals of the project as well as advocacy to increase state funding and achieve policy reforms related to OST.
- **Studio to School** – This is a \$5 million arts education initiative that funds 18 partnerships between community arts organizations and schools serving underserved youth in K–8. In addition to developing sustainable and replicable models for arts education, community engagement and advocacy for arts education to increase public funding are also long-term goals.
- **Economic Vitality** – OCF has grown its impact by investing in activities over the last several years to foster more diverse and environmentally sustainable economic development and business practices. (See sidebar on mission investing on page 38.)

Director of education programs Mary Louise McClintock explained OCF’s overall approach:

“We are mindful in all of our education investments that systems change is part of what we have on our horizon. For example, in the parenting education arena, we got involved because we had been funding smaller parenting education grants for some years and knew it was an effective investment in child outcomes. But we also saw there wasn’t a system in the state and not much in the way of public funding and that, if we were going to make parenting education accessible, accepted and valued, we were going to have to put a big focus on it and help these coordinating bodies come into being. I

think we really have helped change perception of the importance of parenting programs in the state.”

Two state government leaders affirmed OCF’s systemic impact in education equity. One commented:

“The foundation’s emphasis on underrepresented students, students of color, low-income students, the attention they and other community funders bring to equity issues has been vital and important and is resulting in different policies and processes at the state level and I would expect it at local levels too. And I see that being very positive.”

Some stakeholders question the ability of OCF to significantly change systems and advance equity without using the kinds of strategies that enable affected residents and their allies to build power and advocate to reallocate or generate new government funding or change public policies. Even after being slashed for decades, public spending still significantly dwarfs philanthropic dollars.

OCF considers civic engagement to be one of its key priorities, and its main community engagement activities have occurred through the Latino Partnership Program and the now-completed Regional Action Initiatives. Also, some of OCF’s initiatives do make grants to culturally specific organizations – but for service delivery rather than grassroots advocacy.

Laudably, several initiatives prioritize parent or youth participation in decision-making, and some interviewees praised these as examples of community engagement. Worcel pointed out that Community 101 empowers high school students, often low-income and minority, to identify their communities’ needs and to make funding decisions to meet those needs. Yet there is a difference between bring-

ing a few parents or youth onto an advisory board versus funding a constituency group to organize and define their own agenda. A former OCF insider said:

“I think OCF would [get] a B- in terms of involvement of community in influencing work that it does and priorities it sets. It does have eight regional advisory groups that provided input into the strategic plan and ongoing input on community needs – all are well aware of equity commitments and yet I don’t think the foundation has yet succeeded in really engaging people most affected in communities by most of the grantmaking it does. Tends to be advisory groups of community leaders, and not really recipients of services provided by the organizations being funded.”

Further, organizations seeking to advance equity through organizing and advocating hold the longstanding perception that OCF will fund services but not these systemic change strategies. A grantee recalled:

“About five years ago, when we applied to OCF for the first time, we wrote a grant around leadership development because we thought that they would understand that language better than the language we use, which is ‘community organizing.’ So they funded that. But during the site visit, they repeated five different times that they don’t fund policy advocacy. And we repeated that we understand that you don’t fund policy advocacy; that’s not what we’re asking you to fund. But they were mortified that the money, if they gave it to [our organization], would be used to fund policy advocacy.”

In fact, OCF has an accurate reputation for primarily funding social service organizations, education and arts groups and other “traditional” nonprofits through its Community

Grants Program (CGP). Rarely does CGP fund advocacy and systems change. According to the Foundation Center, OCF gave only 3.6 percent of its 2012 grant dollars to efforts coded as “social justice,” the closest proxy for determining how much funding is going towards advocacy, organizing, civic engagement and other systems-change efforts. The preceding years, the proportion was slightly higher at 5 percent. For more recent data, we have self-reporting by grantees. Only 9–12 percent of all surveyed discretionary grantees – which includes CGP, special initiatives and other discretionary funding sources – reported using grant funding for advocacy, organizing or civic engagement, far below NCRP’s recommendation that foundations direct 25 percent of discretionary grant funds toward these activities. Culturally specific organizations were more than twice as likely to report that they engaged in advocacy and organizing than other survey respondents.

Historically, CGP grant reviewers have been instructed to avoid these types of activities, even exhibiting reluctance to fund grassroots leadership development, as illustrated in the prior anecdote. In fact, OCF’s CGP grant evaluator handbook instructs volunteers that “political projects” are not considered “competitive proposals as they may result in polarization of the community rather than consensus building.” It’s unclear what “political” means and how grant evaluators are trained to interpret this. Yet it is completely legal for a community foundation to make grants for community organizing and policy advocacy. Unlike private foundations, a community foundation can even fund or engage in lobbying up to certain limits (\$1 million in the case of OCF), and, as with all foundations, it can make general support grants to organizations that lobby. Many advocacy and organizing groups remain frustrated at their inability to receive OCF funding; when they do, funding is usually limited to providing social services.

While OCF staff members proactively connect donors to potential grantees that apply through the CGP, few of these nonprofits are engaged in systemic change, as those organizations self-select out of applying or are discouraged by past rejections. This is perhaps ironic given that the OCF donor handbook states that it is legally permissible “to make general support grants to nonprofit organizations that perform advocacy work, which may include lobbying. However, OCF may not make grants to organizations to support a particular candidate in a political campaign.” As will be discussed in Finding 4, numerous community leaders have asserted that OCF staff act as gatekeepers to DAFs, putting organizations engaging in social justice work at a double disadvantage as they miss out on two potential sources of funding administered through the community foundation: community grants and donor-advised funds.

Because many social justice organizations are led by and organize culturally specific populations, this puts OCF’s funding approach at odds with its equity and inclusion goals. The following stakeholder’s perceptions reflect those of many social change leaders:

“OCF is the biggest foundation by far in Oregon. They consistently fund a range of community-based organizations. However, they have not invested in diverse communities or communities that are working on policy, systems and environmental change. It’s frankly been fairly difficult to raise resources from them for community-driven programs and initiatives from our experience. We feel they have a really low understanding of the cultural communities and the needs of communities of color, especially refugees and immigrants in Oregon. We see them as a fairly narrowly tailored foundation that primarily funds direct service and maybe some capital campaigns.”

Even some of the donors interviewed for this assessment expressed a desire for the foundation to grow its support for advocacy. As one stated:

“There are very few foundations that are willing to get beyond [a] comfort level of social service to fund social change. With my DAF, almost everything I do is social change funding. But to me it’s an ongoing problem. It’s not that I’m irritated with OCF or any other funder, and grateful they do what they do, but I would love for some of these foundations to take a little risk and get into social change work.”

As discussed in earlier sections of this report, OCF’s reliance on volunteers to be eyes and ears on the ground in their own communities, and to vet community grants applicants, can be a tremendous asset but also a barrier to groups that are not already well understood by and connected to those volunteers.

In contrast to the viewpoints of numerous social justice leaders, Roberto Franco sees the Latino Partnership Program as a primary entry point for social change groups, at least those that are led by Latinos:

“[The] Oregon Community Foundation is the only foundation that has that Latino focus. What that means is, the word we share with Latino communities and organizations and representatives, is ‘The door is open.’ Right now I’m the only one [on staff] with that focus making sure that those doors stay open. ... For all these years, our partnership has been strongest with advocacy and grassroots organizations, but we also recognize that, in the Latino community, there’s that huge diversity and not all of them are doing advocacy or are grassroots. ... But advocacy and grassroots are still part of what we

do and fund. ... We've been part of the whole national executive orders, now in legal limbo but providing funding for DACA in the state of Oregon. So much that we brought other funders to be part of that work."

An immigrant rights leader praised the DACA support but urged OCF to go further upstream:

"OCF did take leadership when it came to implementation of DACA. They actually led a cohort of foundations to pool money to help organizations serve the social services aspect [OCF] feels comfortable with like legal services for immigrant communities. And that's great. The problem is, in order to have achieved DACA, it took significant policy advocacy and community organizing to even win that change. So from my perspective, I'm happy to see OCF funding DACA legal services. ... That's a wonderful place to invest. But they also need to invest in more upstream strategies so that there are more opportunities like that in Oregon. And I think that's where they could grow the most in their leadership is looking at upstream strategies like community organizing and to not shy away from that."

OCF staff point out that the foundation does fund a handful of immigrant-led organizations (see Appendix E) and also funds education advocacy groups such as Children's Institute and Stand for Children. Further, OCF provided early funding and provides multiyear support for Oregon Learns, a project of the Oregon Business Council, an initiative that is working with and supporting Oregon policymakers toward a redesign of the 0–20 education system focused on closing the achievement gap and meeting the state's 40-40-20 goal (that by 2025 40 percent of Oregonians will have a bachelor's degree, 40 percent will have a two-year degree or certificate and 20 percent will have

high school diplomas).

Specific data on the amounts of grant dollars that support such groups annually would help OCF's stakeholders better gauge and understand the level of the foundation's support for such strategies. It is revealing that some of OCF's own grantees that do advocacy and organizing are the very leaders urging the foundation to step up more in its support – by investing at higher levels, investing more upstream, creating more meaningful long-term partnerships with these groups and funding a wider array of social change organizations. Ultimately, if the foundation truly wants to change systems and advance equity, it will need to partner more intentionally with the very communities most affected by injustice.

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 DAFs are mysterious, opaque and guarded by cautious foundation "gatekeepers."

A dependence on donors for fundraising and grantmaking distinguishes OCF, a public charity, from its private grantmaker peers in the state. To illustrate this difference, its CEO, Max Williams, described:

"On any given day, I could be having a morning conversation with a donor using their philanthropy to support Catholic parochial schools and later meet with a donor who is using their philanthropy to help build a new Planned Parenthood clinic. That is the big tent of community philanthropy. It's a very big invitation to all those who want to come and bring philanthropic resources and be part of something bigger than themselves ...

when they come here, they get something better than just transactional philanthropy. They get an invitation to be part of a group of donors that can solve important problems or be more aware of what's going on in specific communities or around the state."

To serve and grow this important stakeholder group, the development and donor relations staff at OCF collectively compose over a third of the foundation's 85 employees.

Planned giving is overseen by the development department, while the donor relations team manages advised giving and donor engagement. Laura Winter, vice president for donor relations, has been with the foundation for 28 years. Winter observed that, throughout her tenure, "OCF has evolved as the center for knowledge about how to execute philanthropy, be involved in philanthropy and understand what our state needs are."

LEVERAGING ASSETS FOR ECONOMIC, ENVIRONMENTAL AND EQUITY AIMS

Impact investing generates a measurable social and environmental impact alongside financial return by providing capital to companies, organizations and funds.⁶⁸ Clara Miller, president of F.B. Heron Foundation, writes that 21st-century funders must "go beyond marginal and auxiliary philanthropy (the traditional and appropriate model for charity) to engage actively with the whole economy, positioning ourselves to be fully engaged for mission both inside the foundation and outside in the economy."⁶⁹

Compared with other philanthropies, community foundations can face special challenges in place-based impact investing due to their unique structures, limited discretionary dollars and donor mandates. As a result, Mission Investors Exchange published the *Community Foundation Guide to Impact Investing* in 2013 to help community foundations maximize their resources.⁷⁰

OCF is an emerging leader in this space and impact investing is a top priority for the new leadership. The foundation has

sponsored studies about Oregon's capital ecosystem⁷¹ and provided loans and grants to help develop a skilled workforce and build the state's post-recession economy.

Guide to Impact Investing profiled OCF for investing one-half of 1 percent of its \$1.3 billion endowment⁷¹ and provided loans and grants to help develop a skilled workforce and build the state's post-recession economy. *Guide to Impact Investing* profiled OCF for investing one-half of 1 percent of its \$1.3 billion endowment, or approximately \$6.5 million, in Oregon-based early-stage investment funds such as the Oregon Angel Fund (OAF). A venture capital fund, OAF contributes expertise, capital and connections to promising startups and early-stage growth companies in Oregon and Southwest Washington. As the endowment grows, so does the amount of investment in early stage funds. OCF reported that the current total is roughly \$8 million, of which \$7 million has been deployed to date.

To further strengthen the foundation's capacity to meet its mission, including its strategic focus on economic vitality in Oregon, OCF launched an impact investment program in 2014. The community foundation's strategic plan for 2015–2018 outlines a goal to continue

this work and "allocate well-targeted impact investments, evaluating their outcomes and priority within OCF's overall mission." This impact investing program uses discretionary grant money to make program-related investments (PRIs). Several years ago, the board approved \$3 million to be deployed for this purpose. It will be fully deployed in 2016, and later this year the board will be discussing any potential future allocations.

To help move capital to rural Oregon businesses, in 2014 OCF invested \$1 million in Craft3, a regional nonprofit community-development financial institution (CDFI). Craft3 provides low-interest loans to entrepreneurs and small-business owners who are unable to access traditional credit. The community foundation also partnered with Meyer Memorial Trust, a leader in mission-related investing in Oregon and southwest Washington. OCF committed \$2 million to the partnership to provide low-interest loans to Oregon nonprofits. Other support includes a loan to the Portland Seed Fund, a company accel-

erator that provides capital, mentoring and connections; and capacity building grants to Albina Opportunities Corporation (AOC), a CDFI that offers financing to small businesses owned by women, people of color, immigrants and persons with disabilities in Portland. The Democracy Collaborative featured OCF as one of 30 innovative community foundations from across the country for its work with Craft3, Meyer and AOC.⁷²

Impact investing is also a vehicle for OCF to support environmental aims. Elizabeth Carey, vice president and chief financial officer, described a recent loan to EcoTrust, a Portland nonprofit whose goal is to foster a natural model of development that creates more resilient communities, economies and ecosystems. In 2014, EcoTrust used a \$1.3 million short-term loan from Craft3 and a grant from OCF to purchase and permanently protect a coastal estuary in Northern Oregon.⁷³ Carey shared that OCF is discussing fossil fuel divestment but sees an opportunity to do more with proxy votes and “activist investing.” She said, “[If we divest], we don’t get a say in what companies do. We have had positive impacts for companies that would have made bad environmental decisions.”

In addition, OCF offers a Socially Responsible Investment Fund to its donors and nonprofit endowment partners to screen out investments inconsistent with their values⁷⁴ and “invest in companies that have strong records in the areas of corporate governance, community relations, diversity and employee relations, energy and the environment, product quality and safety, and non-U.S. operations.”⁷⁵

Melissa Freeman, director of strategic projects at OCF, dedicates a portion of her time to the foundation’s impact investment program, but two peer funders urged OCF to be more assertive:

“If they really wanted to elevate their impact, they would have some people really dedicated to the work and have staffing set aside specifically to do this, a person who was actually out there trying to generate regional ideas on the investment side, not [just] on the grantmaking side ... [t]o have [mission-related investments] as a top priority requires that champion.”

“I would like them ... to use whatever percent makes sense, whatever they use nationally, maybe use 10 percent

... of the asset base to invest in the state and do interesting things. ... [W]hatever those impact investing mechanisms are, they should really get in there and get their donor advisors to agree and get the board to take a much more aggressive, bold stance on using their asset base.”

The Incentive Community Foundation and the Greater Cincinnati Foundation (GCF) have adopted advanced impact investing strategies in pursuit of their mission and community wealth building. According to the Democracy Collaborative, GCF has found wide donor interest in impact investing and committed 10 percent, or \$10 million, of its unrestricted assets to impact investing in 2014.⁷⁶

OCF shows a clear commitment to economically vibrant communities across the state and has become a proactive leader in impact investing among community foundations. To build on the foundation’s success, OCF can increase the portion of its endowment allotted for impact investments, especially investments that advance its equity goals, and dedicate more staff resources to the program. ■

Each donor relations officer manages a portfolio of roughly 175 funds, including some scholarship funds. According to an OCF staffer:

“While sharing community grant and initiative information with donors, donors are also driving their philanthropy. Our job is to be a resource to our donors. We make connections on behalf of nonprofits, arrange site visits, and encourage innovative approaches to assisting communities or individual organizations. We use the vetting of our program staff and volunteers. Donor relations staff will vet nonprofits brought to us by the

donor’s individual interest. We help families work across generations to build a philanthropy legacy.”

The foundation encourages donors to consider a legacy for the future by creating a permanent, endowed fund. Johanna Thoresz, chief development officer, noted:

“When people create funds with OCF, most are endowed funds so the money is invested in perpetuity, which means donors make gifts in their lifetime and then after they’re gone – or family members or successor advisors – they identify areas where they hope they will create [an]

impact after they are gone. It's a little less transactional than making a gift and granting it out right away."

In addition to its existing fund services, the community foundation is currently formalizing a new business plan and service for family philanthropy. Kirsten Kilchenstein, senior donor relations officer, explained:

"Lots of families want to engage the next generation, or want to learn from OCF about the right amount of money to invest, or how to write a mission and legacy statement. They have a million other questions. . . . We've been doing this for a while, but we're putting a frame on it and refining how we talk about it, what it looks like, figuring out which donors might be interested in these services."

a. Donor Engagement

OCF's donor engagement is proactive and robust. The community foundation connects donors to community grant applications, invites support for its special initiatives and offers educational events where donors can connect with staff, professional advisors, other donors and nonprofit organizations.

Observers need not look far for the fruits of OCF's relationship-building. Donors granted \$24.6 million in 2014 through DAFs. The Gray Family Foundation, a supporting foundation at OCF that has awarded \$100 million to Oregon nonprofits since 1997, grew from a donor-advised fund established by locally revered philanthropists John and Betty Gray.

The foundation reports that the majority of its donors are referred by word of mouth or professional advisors such as accountants, attorneys or investors. On what draws people to give through OCF, two donors shared:

"There's just no question that what's unique about OCF is that you have opportunities to actually press the flesh, see the eyes and smiles and excitement from people that are spending those resources to try and get the results we want. I think what's so wonderful about OCF is that they are interested in connecting both the givers and the receivers so that you really have that human side of what's happening."

"I have a DAF with another commercial organization, and, in terms of return on investment, OCF does about as well. There's not a huge difference between the two. When I want to enlarge my fund. . . . I would say I put 90 percent [of my money] with OCF rather than the other one. Just because they have a much warmer feel, aside from what they do for me, but what they do in general and how that benefits the state."

The community foundation's volunteer network also creates a valuable marketing opportunity for prospective donors.

"Volunteers are our best champions," shared Melissa Freeman. She added:

"From a community foundation perspective, where you are trying to get individuals and families to set up funds at the foundation, if you have volunteers invested in your work, they can be the best spokespeople for the community foundation."

One grant evaluator said:

"Through doing the volunteer work, I became more educated about the whole idea of having a family fund. Because I respect the work of the foundation, I'm very interested in doing it there . . . it seems like there'd be

more impact for the money that I have ... by combining it with other people's efforts."

Nonprofit leaders also have been motivated to give through OCF. One grantee stated, "If I won the lottery, I would want to have OCF manage a lot of that money for my philanthropy. It's grown so well because people trust them."

These comments speak to the value of personal connections to both OCF and its mission. Once a donor joins OCF "family," donor relations staff hold a welcome meeting to get to know the philanthropist. A major component of OCF's approach to donor engagement is a semiannual informational fund packet, tailored to each donor, which includes a financial statement, list of recent grants and grant suggestions, i.e., grant applications received through the Community Grants Program that align with a donor's interests. OCF also employs an automated system that helps identify funding opportunities. Kilchenstein explained:

"We code all of the [DAFs' interests] in the database, and, when our grantmaking programs receive proposals that align with donor interests, we share them twice a year. It's a way to leverage more resources and get more support out into the community. The database does an initial matchup but all donor relations officers take copious notes about our donors' interests, and we curate special lists to donors."

In fact, donor relations staff sit in on community grants meetings so they can identify potential new funding opportunities for donor advisors.

To further involve donors and leverage funding for its key goals, each year OCF invites DAFs to support not only community grants but also three pooled funds and several special initiatives. Between 2013 and 2014, DAF support

for discretionary grant programs increased 150 percent, from \$800,000 to \$2 million. Just over half (\$1.2 million) went to community grants, and the rest went to Studio to School, OPEC and children's dental grants. This represents 8 percent of total DAF giving (\$24.6 million) in 2014.

OCF will also establish special funds from time to time to respond to emergent issues. For example, though the vast majority of OCF's grants remain in the state, OCF recently invited its donor advisors to make disaster relief grants to support the Community Foundation of Greater Flint and its Flint Child Health and Development Fund.⁷⁷

OCF staff are also responsive to donor interests and ideas. Kilchenstein noted:

"There's a lot of reciprocity; we're constantly learning from our donors about work that's being done in the community that we didn't know about and then can lift up, and regularly, we're bringing new information to our donors."

As detailed elsewhere, OCF is slowly exploring environmental funding with its interested donors – a tricky issue given Oregon philanthropy's ties to the timber industry. And in 2014, a pair of donor funds commissioned the foundation to conduct an assessment on the needs of public libraries in the state.⁷⁸ Staff also provided the example of a donor who wanted to make \$5,000 grants to "seed philanthropy" among prospective donors who couldn't afford OCF's \$25,000 minimum to establish a DAF.

To engage donors and the professionals who serve them, OCF sponsors a variety of events, such as an annual luncheon, funder tours and nonprofit site visits, seminars for financial advisors and educational programs for donors. In the fall of 2015, OCF hosted a breakfast meeting and panel specifically

geared toward women, entitled *Women Give: Creating Impact with Money*. Staff reported attendance of 300 plus a waiting list, far exceeding expectations. Sonia Worcel described OCF's convening as a strength of its donor engagement:

"Whether it's children's dental health or the importance of arts education, pick a program, and we've probably done something on it to educate donors about issues, tell them what the foundation is doing and share with them the ways donors can partner in that work. Any number of our initiatives have had donors contribute funds from DAFs to support the work that has allowed us to have more grantees than we otherwise would've been able to have."

Yet, like other public charities dependent on cultivating and retaining donors, OCF is strongly wary of pushback from donors and efforts that may polarize its constituents. This has presented new challenges with the institution's commitment to equity, diversity and inclusion. Kilchenstein elucidated:

"It's not our mission to manipulate people's interests, but we educate. We've been talking about, as a department, the issues and disparities in communities and we're mindful of the language we use with donors. There are polarizing trigger words – the hard part is you'll never know who you'll be triggering with your words. Our goal is to address the disparities and advance equity, diversity and inclusion through all our grantmaking avenues, including DAFs. We're learning how to use language and bring folks together around shared interests to improve lives for underserved and underrepresented communities who have been historically disadvantaged."

A recent survey of OCF's donors found an appetite for increased engagement. OCF contracted The Giving Practice

at Philanthropy Northwest to conduct a confidential assessment of its donor engagement in spring 2014.⁷⁹

Among its findings, the assessment reported: 1) "Donors express a readiness to engage more deeply with other donors and OCF around key issues in the state," and 2) "Donors believe OCF is well-positioned to take a more active role in community and statewide issues, as convener, leader or collaborator to leverage other interests and address compelling needs." Regarding deeper engagement with other donors and/or OCF, donors were asked to rate their level of interest in 10 key issue areas. Equity/disparity ranked fourth on the list of issues of interest to donors. Equity/disparity also came up as the fourth most popular response regarding the areas they are most interested in OCF taking a leadership role.

With clear disparities in the state, and demonstrated underfunding of communities of color and culturally specific organizations, this feedback shows that OCF has the opportunity to engage donors in support of equity and social change. OCF staff have indicated that they do share information and educate donors on these topics, but the next section reveals that many grantees, community leaders and some peer funders are not aware or don't see the benefit for their communities.

b. Perceived "Gatekeeping" Role

OCF prizes its humility as an institution, particularly in its relationship with donors. Williams encapsulated OCF's philosophy when he said:

"Every time I receive some award, I remind the audience that, while I'm happy to accept the award on behalf of OCF, every dollar we do something with, every grant we make and every employee we hire, the dollars came from a dedicated Oregonian."

In detailing this quiet approach, a handful of staff and other people close to the foundation echoed a concern that Laura Winter shared: “People still say we are the best kept secret in Oregon.” Despite the foundation’s explosive growth of assets, statewide presence and expansive volunteer network, a stakeholder close to the foundation observed:

“A lot of people still don’t know about the foundation, and there’s a mystique about foundations generally. People who don’t know what [they] do think it’s for the very rich and not accessible. No one knows what’s going on behind this big foundation name. [OCF needs] to be vigilant about making the foundation more accessible. [For example, they] dropped the entry level from \$50,000 to \$25,000 to establish a DAF.”

In addition to lowering fund minimums, to let others in on the “secret,” staff identified a need to improve the foundation’s communications. Winter related:

“People would say we need to be bolder in taking credit for our work. We just went through a rebrand, with a bolder statement, bolder advertising and new ads, which are just being rolled out. It’s still in process.”

Sheila Murty, vice president of operations, also explained:

“My perception of this organization is that it’s rather humble. They don’t like to honk their own horn, so to speak. They really value that we’re here because of donors that care about these causes. We tend to work more quietly ... but there are other people that need to know how to connect with communities and causes they care about, and need to know that there’s a way to do that.”

In each of these examples, the interviewees described the audience in need of increased access to the foundation as donors. Yet our assessment found that those who are most impacted by a sense of mystery about OCF are nonprofits and community leaders.

Some stakeholders perceive the community foundation as a staunch gatekeeper for its donors; others are simply perplexed about how to access DAF funds. As noted elsewhere in this report, the foundation and its DAFs are often characterized as impenetrable and inaccessible, particularly among communities of color and culturally specific organizations.

The foundation’s previous CEO, Greg Chaillé, recently co-authored a book entitled *State of Giving*, which profiles eight well-known organizations serving marginalized communities in the state: Pineros y Campesinos Unidos del Noroeste (PCUN), the CAPACES Leadership Institute, Native American Youth and Family Center (NAYA), Urban League of Portland, Immigrant and Refugee Community Organization (IRCO), Center for Multicultural Organizing (CIO), Incight and Basic Rights Oregon.

Nearly all of the organizations profiled – most of which have been OCF grantees – discuss challenges to garnering individual donor and foundation funding. The authors write, “Oregon’s donor community needs to make a more concerted effort to help marginalized groups gain support more broadly,” and “a willingness to fund 501(c)(4)s ... is also necessary to formalize social change.”

Community foundations have greater legal latitude than private foundations to support advocacy, particularly through their discretionary grantmaking, and can earmark grants for lobbying and lobby themselves.⁸⁰ But even they face limits: OCF has a roughly \$1 million cap on the annual

amount it can spend on lobbying and grants for lobbying, which includes grants to 501(c)(4) advocacy groups.

However, individual donors' nondeductible giving is an excellent potential source of funding for advocacy groups because they don't face the same legal restrictions as institutional grantmakers. While donors cannot use advised funds to support lobbying, OCF can help connect individuals to advocacy organizations and educate them about existing advocacy efforts.

It is difficult to ascertain to what extent OCF DAF funds are supporting social change or benefiting and engaging underserved populations, in particular culturally specific groups. The foundation's EDI workplan identifies goals to: 1) "Develop a systematic and uniform method for collecting vital data to track populations served by flow of funding dollars, programs and resources," and 2) "Track and report data to measure progress and to identify marginalized groups and organizations who have the highest impact on these groups." As noted earlier, OCF has begun tracking populations served for all 2015 grants, including DAF grants, although not yet publicly sharing that data.

We do know that OCF DAFs are primarily supporting nonprofits in their home state. A review of Foundation Center data shows that of all OCF grants made in 2012, 2013 and 2014, including discretionary and advised grants, 93 percent of dollars remained in Oregon. In fact, to help align donors' own charitable interests with OCF's mission, the foundation requests that at least 50 percent of donors' recommended grants go to Oregon-based nonprofit organizations.

Oregon nonprofits are eager to access other sources of funding through the community foundation's relationships with donors and other grantmakers. While the main source

of competitive funding at OCF – the Community Grants Program – is meant to serve as an entry point to the foundation, it awards very modest grants. When asked to identify up to five characteristics of the partnership with OCF that could be improved, a third of the organizations chose "exposure and connections to other funding sources."

An OCF staffer reported that many grantees are supported by both DAFs and the Community Grants Program; in fact, DAFs also contribute to the funding of community grants. Further, the staffer noted:

"Program officers and other staff routinely share information about other grantmakers with nonprofits, and we often host and participate in grantmaker panels for nonprofits that include representatives from OCF and other regional funders."

Yet numerous grantees who participated in this assessment expressed confusion and frustration about how they might access OCF's donors and DAFs. Sample comments from nonprofits and grantees included:

"The thing I would change is encouraging more donors to give to either the Community Grants [Program] or some other fund that is more accessible for people to just be able to apply to."

"I think that there is something mysterious about how people access DAFs. It's very confusing to people who work on the ground. Among the high level people at OCF, I'm not sure [they] even understand."

"I know that they did invite some of their donors to the Latino Partnership Project mingling, but beyond that I have not engaged with donors [through] OCF. I have interacted

with donors with other organizations for other purposes, but not because of OCF. I feel there's a distance between OCF – their donors, their trustees – and the community.”

“The biggest way it breaks your heart, as a fundraiser and group that is looking for pathways to resources, is they have a vast network of DAFs, and the only way we've figured out how to do anything to engage the donor advisors is to pull a list off of OCF's website and comb through it to see if there is any connection to approach folks and reach out to them directly. That's tedious and ineffective.”

“Their program officers have no shared education, like when I've asked before around immigration issues, oftentimes the program officers have no resources to be able to advocate around these sorts of issues so they just don't talk about them with their advised funds. The big pot of money is all the advised funds.”

“[OCF is] not very transparent ... they have staff that advised the DAFs, but I don't have any access to that staff to make the case for why these donors might be interested in policy work, we have no way of interacting with them and to pitch ourselves to them.”

Part of the challenge may be miscommunication. For example, a community leader recounted that, after failing to persuade OCF staff that some of its donor advisors may have an interest in supporting an unsuccessful 2014 campaign to secure the ability of undocumented immigrants to drive, LPP was able to provide resources. OCF staff noted that, in fact, they did reach out to some donors about the measure, who decided to support the advocacy and education work (but not lobbying) of several organizations. But this leader remained unaware.

Similarly, a grantee simultaneously applied for a community grant and funding from a specific DAF and only got the DAF funding. OCF staff reportedly gave the (mis)impression that CGP has a “supplant not supplement” policy, which OCF denies. This person called for the foundation to host open houses, where grant applicants could meet donors, and workshops where OCF could explain how grant applications are “shopped around” to donor-advised funds. In response to these various complaints, OCF staff explained that the role of community foundations is not to do development work for nonprofits, but to serve as a link and mediator between donor advisors and nonprofits. A perception of inaccessibility extended to peer funders, who related similar experiences from their own relationships with OCF or those of mutual grantees and donors. One observed:

“I hear from donors of mine, who are [also] donors of theirs, that [donors] just don't get much [from OCF] in the way of... ‘Hey I think you should do this.’ It's more like, ‘We're going to get all these grants submitted to us and we'll figure out which grants align with your DAF, and we'll put something that meets the requirements in front of you.’ ... There's a strong gatekeeping role that's not advancing a lot of causes in the community. The gatekeeper role and opaque connection to donors is tough to move things.”

To improve its donor engagement with nonprofits, OCF could expand on work that is already taking place in some regions. Donors in Jackson County shared how the Walker Fund brought together donors, grantees and other community leaders to celebrate grant announcements. Southern Oregon staff planned a June 2016 event in Klamath County to bring together nonprofits, donors, volunteers and community leaders. In addition to creating relationships, convening and collaborative efforts give stakeholders the opportunity to learn. When volunteers work on community projects

together, as they have through the Leadership Councils' Regional Action Initiatives, it provides a new perspective about the life experience of others. Freeman observed:

"The cool thing [about working with volunteers] was some of the volunteers that we worked with were regular folks out of the community, and some were donors. It really gave donors the opportunity to see community in a way they had never seen it. Some didn't have kids in schools, and this gave them a chance to see what it's like for kids and families. It gave them a more open, humble idea of what's going on. A lot of them had no idea. They didn't even know what the minimum wage was at the time. That all the fish factories were filled with Hispanic workers. The community has changed, and they didn't know it until they had a reason to seek information."

As OCF continues to operationalize its commitment to equity, diversity and inclusion, and to exercising greater public leadership as an advocate for systemic change, the foundation has the opportunity to explore new ways to connect its donor advisors to social justice efforts and to culturally specific organizations, communities and causes and to diversify its donor base.

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's 2015–2018 strategic plan signals that the foundation intends to broaden its public leadership role. It states, "As the foundation has grown, its roles have multiplied. While affirming the core community foundation tradition of responsiveness to community-identified needs, OCF accepts the responsibilities of leadership and partnership inherent in being the

state's largest philanthropy." It affirms its "steadily evolving role as a statewide leader on key issues," and it commits to:

- Promote public policies that further OCF's priorities.
- Expand OCF's proficiency and capacity to affect public policy.
- Monitor policy developments relevant to OCF's priority areas and the philanthropic sector.
- Contribute to statewide policy discussions and educate OCF constituents about important policies.

Given this evidence that the leadership of The Oregon Community Foundation would indeed like to grow its advocacy and policy engagement, it has positioned itself well to do so. President Max Williams has an extensive background in government: he was a state legislator for five years and then was appointed director of the Oregon Department of Corrections, a position he held from 2004 through 2011. Although Williams was a Republican representative in the Assembly, he served a Democratic governor and has a reputation as a leader with strong policy expertise who can work with people of all political stripes.

While head of the Corrections Department, Williams took a "smart on crime" approach: he established transition programming for prisoners being released and fought to preserve state funding for it, and he beefed up services for prisoners with mental health issues, including setting up a mental hospital inside the state penitentiary.⁸¹ An LGBTQ advocate recalled that Williams bent over backward to ensure that their joint efforts to support transgender inmates would carry on after he departed.

Stakeholders almost universally praise Williams for his leadership attributes – "He's been a recognized civic leader, no question," said one interviewee – and for his efforts to steer

OCF in new directions in the policy arena. Philamplify survey and interview responses were coded and weighted for public leadership attributes and weighting was extremely positive. One OCF staffer described a noticeable shift after Williams arrived:

“One area where I would attribute the change [at OCF] to Max’s leadership is around engagement in the policy arena. Given his background in state politics, he comes with that expertise and lens. ... Over the last couple years, OCF has taken positions in favor of specific pieces of state legislation in Salem, have had staff and board that have testified at legislative hearings in Salem, so [OCF has] done more of that work than we have in the past.”

OCF’s constituents overwhelmingly agree that OCF can and should assert more public leadership to advance equitable state policies and funding. One former state official was blunt about the need:

“We have major challenges and problems, and I can’t recall a single piece of OCF funded research or work that has shaken the complacency in a state that badly needs its complacency shaken. They do good service delivery and support a lot of nonprofit institutions but ... as a leader in this community of nonprofits or foundations, I don’t give them particularly high marks for trying to change that paradigm. ... Philanthropy [is only] 2 percent of GDP. ... We can’t afford to keep pretending that a few small changes in the margins will be transformative.”

A current member of state government pointed out the limitations of piloting innovative programs and systems:

“I do think these efforts, private and philanthropic, run into the challenge of scale and sustainability. Notwith-

standing all the innovative work that organizations, including [The] Oregon Community Foundation, are funding, we lack the [state] funding and wherewithal to apply them systematically and sustainably. I think they, like other foundations, really need to wrestle with the question of what it will take to move beyond the pilots and innovation and paving the way, the modeling, into something systemic and sustainable. That can’t happen with just philanthropy.”

While some stakeholders don’t see signs yet that OCF has expanded its policy leadership role, others characterize the foundation as early in its evolution. Peer grantmakers welcome OCF into this space, especially given its ability as a public grantmaking charity to engage in direct advocacy and lobbying, albeit within limits. One observed:

“I’m an advocate of advocacy, and I think that’s an area, as they push the equity agenda forward, it’s a major role. I’d say they are on the early part of that journey, just as we are. We may be further along but we have more limitations on direct advocacy work that they don’t. I would hope that as they continue to evolve their equity work they would take more public positions for marginalized populations that we are trying to advance through our equity work.”

Another added:

“We would love to see [OCF] pushing the envelope on the [education] issue all the time. They do have a lot of power. Their uniqueness ... is that they can do lobbying which private foundations do not. They can bring clout into the legislative arena. They do sometimes. And they appreciate that we do. They could probably do more. They are a really respected convener, and to use that power carefully

but aggressively would be great. ... There are areas that are ecumenical enough or uniting enough for Oregonians that [OCF] could take an aggressive lead to get to statewide solutions in the policy arena.”

OCF earned particular praise for its leadership on dental health, including funding public education to support a dental health ballot measure. The measure, to fluoridate water in Multnomah County, failed, but the process was still valuable for OCF, as one staffer described:

“We provided a fairly sizable grant for the public education aspect of the work that the [grantee] organization was doing, helping them with publications and outreach and all public education work around helping the public understand why fluoridated water was important. It was a turning point for the foundation to have the board be willing to make that grant and take that stand.”

And OCF has advanced dental health on several other fronts with a combined \$3 million investment from Oregon funders, as Melissa Freeman described:

“The whole point is to serve kids who are in low-income communities who don’t have access to a dentist. They may have access to Medicaid insurance, but coverage does not guarantee care. [The program] brings professionals in to the schools, where the kids are, for prevention and urgent care. We have mobilized a team of funders to go down and testify to the importance of oral health. Last year we got a [statewide] strategic plan for oral health produced in partnership with other funders.”

This proactive leadership has struck a positive chord with numerous constituents, including this grantee:

“OCF did a really great job on dental initiatives, working with nonprofits and other foundations and industry. They said this is a crisis in our opportunity. It was post-fluoride vote ... [and] they led this initiative to bring people together around addressing dental health because it disproportionately impacts kids of color who are poorer and low-income and can’t afford health care or weren’t insured. They were a leader in that, and there was some partnership that came out of that, which was great.”

Also, Worcel noted that historically and today “OCF staff and board engage in leadership policy work in multiple other ways including writing op-eds, testifying to the legislature and other state boards and commissions, writing letters in support of particular pieces of legislation and serving on state-level commissions.” For example, OCF has done a lot over the last decade to elevate the need to strengthen the quality of the early child care workforce at the state level. Mary Louise McClintock served on several governor-appointed commissions related to early childhood, including the past governor’s transition team for early childhood. At the other end of the youth spectrum, a former staff member served on a statewide committee to revise the state financial aid program to ensure greater post-secondary access to Oregon’s neediest students.

In addition to these types of ongoing leadership, OCF is re-tooling to grow its capacity to effectively move long-term agendas. Williams explained:

“We have been working with [philanthropy consulting firm] FSG on how to transform from what has generally been a responsive grantmaking organization to be more strategic, not only in discretionary grantmaking and on the responsive side, but how [to have a] big cadre of people that can do leadership work I’m talking about. ...

We need a mechanism about how to manage that work, how to recruit and hire the right people to do the work, how to situate the work with strategic decision-making for senior staff and board that hasn't previously existed."

In doing so, OCF can build on Williams' policy savvy. One culturally specific leader mentioned that, even though OCF doesn't fund her organization's advocacy work, Williams provides her strategic advice about navigating the legislative environment. A collaborative stakeholder appreciated Williams' understanding of the need to be "nimble and agile" when doing policy work:

"When you play in the policy arena, you cannot predict what opportunities will be in front of you and when. We were just talking about [getting state legislation passed], and Max was clear that we have to be willing to walk away if we aren't getting the outcome we want, and we have to be willing to put more money into advocacy campaign if needed. He said this is an adaptive leadership model, and we have to be prepared that way."

Ironically, "nimble and agile" are words that only a few stakeholders associate with OCF; many more refer to OCF as a slow-moving ship. Thus Williams' work with consulting group FSG will present an opportunity to create an increasingly deft organization. Whereas OCF received positive feedback in our interviews and surveys on most public leadership attributes, its least positive was around its willingness be bold and innovate.

For example, with its roots in the timber industry, it is taking a methodical approach to environmental issues, on which some of its donor advisors are strongly urging the foundation to assert leadership. Melissa Freeman pointed out the delicacy:

"Now if we switch gears for a second and say we are going to talk about environment and natural resources, and you've got a foundation set up a by a family of timber barons. You've [also] got all these donors that are conservation-minded environmentalists, so you have to be careful and walk a line to not cause a rift in the community foundation. For that type of strategy, where you've got research on both sides – economic needs of state, environmental benefits of conservation – we find the sweet spot is in collaborative projects."

Laura Winter added that the foundation and its board are working with a group of donors who are interested in increasing environmental funding. The foundation is exploring how to be a funder in this area and attract new donors in the process. She said:

"OCF is not going to be taking sides, but we are looking at where we can bring communities together around solutions and help those communities leverage dollars that are available federally, state, other national foundations, to address issues in their own communities."

Regarding OCF's comfort with being an advocate more generally, constituents are seeing a gradual shift over time, as one grantee described:

"Today, they are willing to come to a table with other funders to talk about ballot measures, to talk about policy issues, systems change issues. Now they're willing to do that. The question is: Are they willing to invest in that in a meaningful way? The answer to that is still no. But they're willing to talk about it, which is a step forward."

Ultimately, it will fall to OCF's leaders to balance the urgency of issues facing Oregon communities, from health and

educational disparities to climate change, with the temperaments of its donors. For some constituents, the solution is rallying donors around urgent causes. OCF appears to be moving more in that direction, reported Kilchenstein:

“We are in the middle of a research effort for our donor engagement strategies, whether it’s giving circles or different ways for donors to give together for issues they care about in natural resources and the environment. We help donors come together, go on site visits, and make strategic investments. We will be open to what our donors want to say – some want to do edgier funding – so we will be open to those conversations. We haven’t done this yet, so I’m just imagining what it would look like. ... We’re starting with the environment because there has been support for it. So we will pilot this and possibly expand it to other issues down the road.”

For others, it is funding more “edgy” competitive grants, as one peer funder urged:

“My personal opinion is that intractable problems need solutions. [Instead of saying] ‘people don’t agree, so you can’t get things done,’ it would be nice if philanthropy could cut through that and have an[other] option, or you could create an organization in which difference of opinion is embraced and accepted. DAFs are going to do what DAFs are going to do. Competitive grant-making is directed by OCF [and reflects the] will of the foundation. I would like to see competitive grants take some more controversial positions.”

As OCF embraces a more visible role as advocate and public leader, social change advocates and grantmakers implore it to include Oregonians most affected by inequity more meaningfully as grantees, partners, volunteers, staff, leaders and advisors to the foundation.

CONCLUSION

Philamplify's extensive research found much to praise in the continuing legacy of OCF's statewide presence and volunteerism, robust donor engagement, early investment in bridge-building with the growing Latino population, and now Williams' leadership and the sincere hard work of his evolving team. Today 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 levels of funding to constituent-led organizations and to grassroots advocacy and organizing, especially for its size. Many stakeholders, including donors, community leaders and grantees, have very little awareness of OCF's EDI commitment. Moreover, Philamplify's research found that many culturally specific organizations and other constituent-led groups have reported being excluded by OCF, an institution they have long viewed as "cautious," "impenetrable" and a "gatekeeper" to its donor advisors. Those closest to OCF's efforts see a slow moving ocean liner gradually being steered in a new direction, and they urge the foundation to speed up and put more force behind its motion.

OCF is indeed taking steps to become a more inclusive, agile, strategic and adaptive grantmaker. Connecting 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 commu-

nities 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.

RECOMMENDATIONS

Philamplify urges The Oregon Community Foundation to adopt the following recommendations, informed by extensive feedback from its stakeholders in Oregon:

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 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. In addition to expanding the Community Grants Program's capacity-building guidelines, the foundation 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.

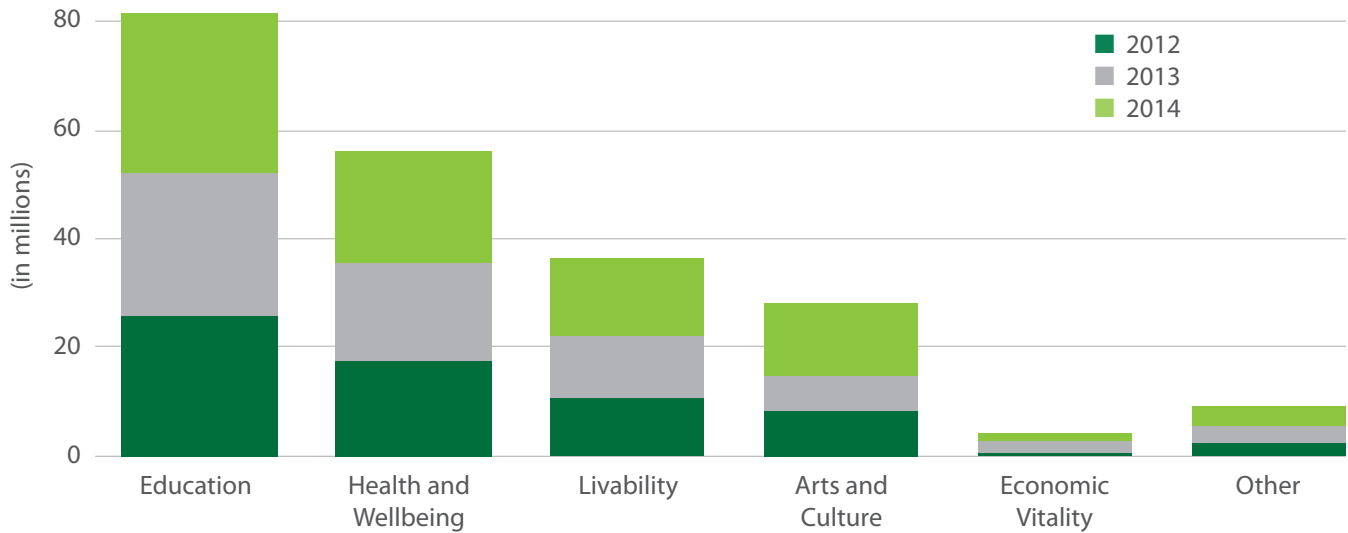
- 5. Expand OCF's efforts to diversify donors, engage them on equity issues and connect them to culturally specific organizations and other constituency-led groups working for systems change.** Create strategic opportunities for donors to participate actively in advancing the foundation's goals for equity, 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 learning 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. The foundation can be an advocate within the community foundation sector for impact investing that advances equity and vibrant urban and rural economies.

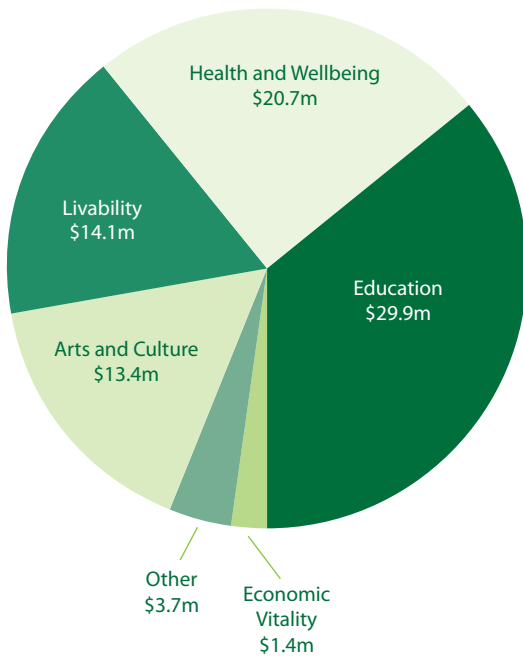
APPENDIX A

KEY TRENDS IN THE OREGON COMMUNITY FOUNDATION GRANTMAKING, 2012-2014

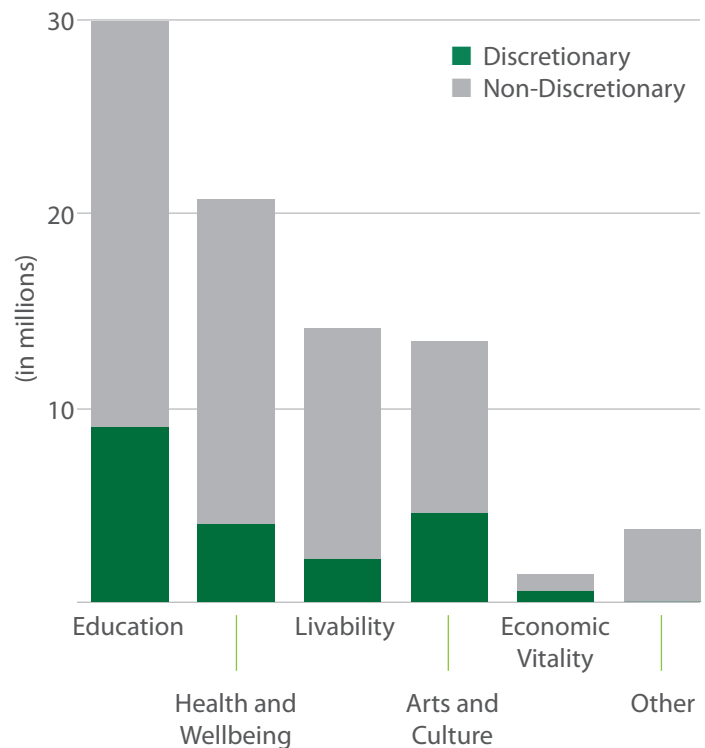
Graphic 1. Funding Levels by Topic, 2012 -2014



Graphic 2. Total 2014 Grantmaking: \$83,270,214



Graphic 3. Grantmaking by Topic and Type of Funding, 2014



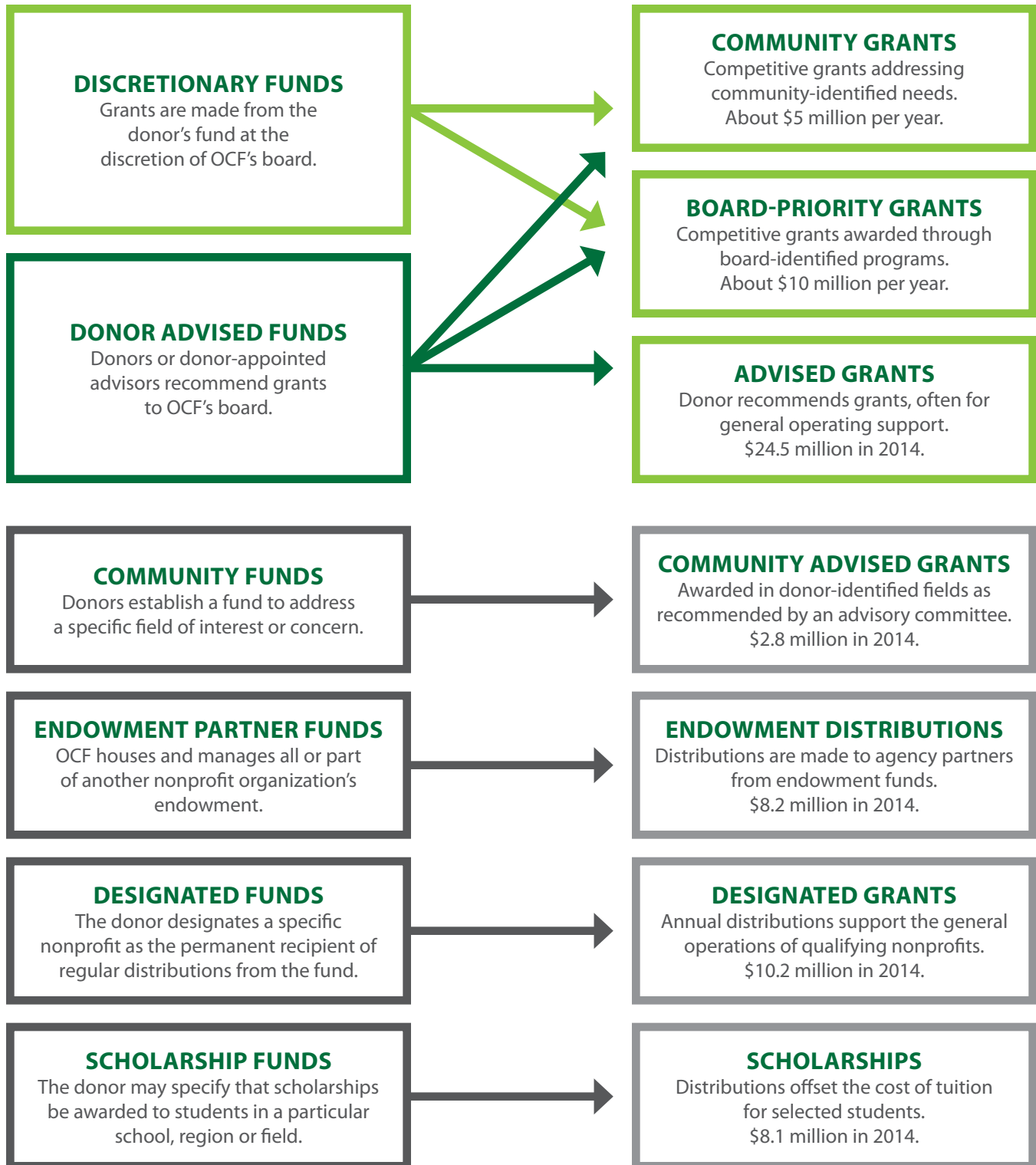
Note: Non-discretionary grant sources include donor-advised and -designated funds, endowment partner funds, community field-of-interest funds, scholarship funds and supporting organization funds.

Table 1. Non-Discretionary and Discretionary Grantmaking by Topic and Sub-Topic, 2014

Topic and Sub-Topic	Non-Discretionary	Percent of Total Non-Discretionary	Discretionary	Percent of Total Discretionary
Education	\$20,927,887	33.2%	\$8,976,404	44.4%
Scholarship	7,514,984	11.9	0	0.0
Higher Education	4,925,278	7.8	853,701	4.2
K-12 Education	3,590,673	5.7	2,230,566	11.0
Out-of-School Time & Mentoring	2,503,091	4.0	2,427,909	12.0
Adult Education	1,449,948	2.3	103,000	0.5
Early Childhood	940,594	1.5	3,210,228	15.9
Education Research & Policy	3,318	0.0	151,000	0.7
Health and Wellbeing	16,733,786	26.5	3,968,140	19.6
Physical Health	7,858,564	12.5	1,168,572	5.8
Human Services	6,386,151	10.1	974,395	4.8
Violence Prevention, Crime, Legal	837,407	1.3	334,110	1.7
Mental Health & Substance Abuse	737,654	1.2	759,041	3.8
Housing	477,010	0.8	388,500	1.9
Child Welfare & Foster Care	437,001	0.7	343,522	1.7
Livability	11,863,677	18.8	2,231,033	11.0
Environment	4,475,518	7.1	696,792	3.4
Voluntarism, Leadership & Civic Engagement	2,328,991	3.7	1,103,916	5.5
Parks, Recreation & Leisure	2,153,944	3.4	266,325	1.3
Libraries	1,779,280	2.8	93,000	0.5
Educational Entertainment	1,024,522	1.6	11,000	0.1
Civil Rights	101,421	0.2	60,000	0.3
Arts and Culture	8,912,872	14.1	4,505,734	22.3
Visual Arts	3,827,548	6.1	215,353	1.1
Music	1,652,866	2.6	668,772	3.3
Cultural Heritage	1,627,798	2.6	326,429	1.6
Performing Arts	677,327	1.1	846,160	4.2
Arts Education	653,717	1.0	1,917,110	9.5
Literary Arts	376,492	0.6	258,760	1.3
Arts General	97,125	0.2	273,150	1.4
Economic Vitality	852,977	1.4	549,600	2.7
Community Development	438,379	0.7	86,000	0.4
Workforce Development	290,404	0.5	253,000	1.3
Other Economic Vitality	124,193	0.2	210,600	1.0
Other	3,748,105	5.9	0	0
Religion	2,230,080	3.5	0	0
Animals	1,294,026	2.1	0	0
Other	224,000	0.4	0	0
GRAND TOTAL	\$63,039,304		\$20,230,910	

APPENDIX B

THE OREGON COMMUNITY FOUNDATION – TYPES OF FUNDS AND GRANTS, 2014-2015



Source: *The Oregon Community Foundation Orientation Guide for Volunteers*, http://www.oregoncf.org/Templates/media/files/volunteers/orientation_guide_rev_6_15.pdf.

APPENDIX C

THE OREGON COMMUNITY FOUNDATION – REGIONS BY THE NUMBERS, 2015

Region	Counties Served	Total Population (2010 Census)	Regional OCF Office	Number of Funds	Number of Volunteers	Size of Leadership Council	Number of Scholarships Awarded	Value of Endowment (in millions)	Amount of Grants and Scholarships to the Region (in millions)
Central Oregon	Crook, Deschutes, Jefferson, Sherman, Wasco and Wheeler, and the Warm Springs Reservation	231,795	Bend	170	119	26	163	\$47m	\$4m
Eastern Oregon	Baker, Gilliam, Grant, Harney, Malheur, Morrow, Umatilla, Union and Wallowa	184,003	Bend	79	155	17	323	28	3.6
Northern Willamette Valley	Marion, Polk and Yamhill	489,931	Salem	127	119	24	283	53.6	4
Southern Willamette Valley	Benton, Douglas, Lane and Linn	639,545	Eugene	324	249	23	782	244	16.4
Metropolitan Portland	Clackamas, Hood River, Multnomah and Washington	1,663,382	Portland	975	536	25	712	940	44
North Coast	Clatsop, Columbia, Lincoln and Tillamook	157,674	Portland	58	73	25	148	18.4	3.5
South Coast	Coos and Curry	85,407	Coos Bay	50	85	21	221	23	2.5
Southern Oregon	Jackson, Josephine, Klamath and Lake	360,194	Medford	165	237	23	444	115	7.9

Source: Region, county and office information drawn from www.oregoncf.org. Data drawn from OCF's 2015 Annual Report.

APPENDIX D

IF YOU BECAME THE CEO OF THE OREGON COMMUNITY FOUNDATION ...

The table below shows the primary themes and sample quotes that we received from The Oregon Community Foundation’s grantees in response to the following questions:

- If you became the CEO of The Oregon Community Foundation, which strategies or practices would you continue to use? What would you maintain about the way you work with grantees?
- As CEO, which strategies or practices would you change in order to increase impact? What would you change about the way you work with grantees?

What strategies or practices would you continue to use?	Which strategies or practices would you change in order to increase impact?
THEME 1: RELATIONSHIP BETWEEN OCF AND GRANTEES	
<ul style="list-style-type: none"> ▪ “Keep the local offices staffed with friendly, available, caring people whom we see frequently at local nonprofit events. It truly makes a difference when I see [my program officers] at local meetings or nonprofit socials. They are so open and available, and I feel I could reach out to them for assistance or professional advice on almost any topic.” ▪ “I would continue to use community volunteers to review grants, but would make sure that they are fully trained and approach the task in a consistent manner.” ▪ “[Keep] offices based around the state. This is an enormous plus for the foundation in so many ways: community connections, nonprofit relationships, potential philanthropists and visibility.” ▪ “Continue to rely on local or regional leadership and volunteers to help identify local issues and evaluate applications for merit.” 	<ul style="list-style-type: none"> ▪ “I would like to implement more sensitivity on the part of volunteer grant reviewers to the needs and value of small, innovative organizations. A stronger emphasis on the guidance role as opposed to only the evaluation role.” ▪ “I would have the local representatives become more present with area nonprofits by attending an annual meeting and/or making themselves more noticeable.” ▪ “Where [outcomes] are not good, identify grassroots organizations doing the type of work that I think needs to happen to change the system, encourage program officers to build relationships with those organizations.” ▪ “Foundations need to become more interactive with the nonprofits – creating their own partnerships instead of a funder/applicant relationship.”
THEME 2: FUNDING FLEXIBILITY, DAFS AND MULTI-YEAR GRANTS	
<ul style="list-style-type: none"> ▪ “Maintain the donor relations officers who work directly with grantees. Those relationships are critical (a lifeline) to those of us writing grants in nonprofits.” ▪ “They are flexible when grantees are wanting/needing to shift resources when appropriate rationale is provided.” ▪ “I believe that multi-year, heavily facilitated grant partnerships are probably the best way to effect long term change in a community. I have no doubt they are also extraordinarily expensive and they are definitely time consuming for both the grantee and grantor. I would continue to use that strategy when funds are available and a need is clearly defined.” ▪ “OCF did an excellent job of funding a project, which we needed to move forward in our goals. We appreciated the freedom to move forward on our own strategic plan, without having too much outside expectations from an organization [OCF] that potentially does not understand the field.” 	<ul style="list-style-type: none"> ▪ “To increase impact, possibly provide multi-year grants to groups of organizations with similar missions. Using the collective impact approach will serve more people with parallel programs and services.” ▪ “Increase the connection between donor-advised funds and prospective grantees.” ▪ “Provide more multi-year and general support grants. Encourage donors to do the same. Host open houses where charities can meet donors who are interested in their work to help build relationships. Host workshops explaining the grant evaluation process, especially how community grant applications are also ‘shopped around’ to donor-advised funds, where both donors and charities can participate together, so everyone is on the same page with understanding the somewhat cryptic, convoluted process.” ▪ “We need larger more consistent grants over at least 3 years.”

IF YOU BECAME THE CEO OF THE OREGON COMMUNITY FOUNDATION ...

What strategies or practices would you continue to use?	Which strategies or practices would you change in order to increase impact?
THEME 3: PUBLIC LEADERSHIP, NETWORKING AND CONVENING	
<ul style="list-style-type: none"> ■ “Continue the thoughtful assessment of the needs of the state for long-term social benefit of underresourced communities. I would hope to continue to look at the entire landscape of nonprofits and philanthropic desires to build trust and strategic action. I would continue to facilitate consistent communication between foundations, funders and not-for-profits.” ■ “Continue to work with the smaller communities and help them network with each other to share ideas and knowledge.” ■ “I would continue to hold grantee convenings (and increase them to 2x/year) so that grantees are able to network more effectively.” ■ “Continue OCF’s role as leader and partner, creating programs in areas where long-term needs are greatest in Oregon. I would maintain their strategic initiatives in Civic Engagement, Economic Vitality, Education, Health of Children & Families, and Arts & Culture.” 	<ul style="list-style-type: none"> ■ “Encourage the development of relationships with grantees. OCF has a wide network and some clout that I do not believe it leverages as well as it could. I would encourage those relationships so that the foundation could possibly help (where appropriate) put the grantees in contact with other funders, etc. I would also work to put grantees in front of policymakers when their work and policy ideas are ripe.” ■ “Take positions on important issues and use clout to bring people to the table.” ■ “Increase convening activities, helping grantees network/connect with policymakers, other nonprofits and community decision-makers. Share expertise with nonprofits that will strengthen their work in the community and their sustainability as an organization.” ■ “More definition of funding priorities for community fund grants. More convening of nonprofits around issues, as well as with donors, to help the community/state move forward faster to solve deeply entrenched issues. More risk taking; consider more large multi-year grants in order to broaden impact.”
THEME 4: GEOGRAPHY AND EQUITY	
<ul style="list-style-type: none"> ■ “OCF has been exceptionally responsive to its grantees, making processes easy and effective. I also feel the staff works really hard to ensure geographic distribution of dollars across Oregon. I would continue both of these.” ■ “Continue the open communication and strong personal relationships. Continue the convening of partners and funders. Continue coming to where grantees are ... even if we are extremely rural.” ■ “Keep innovating with ‘proactive outreach and engagement’ with community, rather than waiting for grants to arrive. OCF is the best at this. ... Keep placing staff in the keystone areas of the state. Very helpful for those not in Portland-Metro area.” ■ “Continue to build the base of donor advised funds to meet the large and diverse needs of the community. Maintain close relationships with rural communities throughout Oregon.” 	<ul style="list-style-type: none"> ■ “OCF should look hard at its giving to ensure it is ... helping promote equity in Oregon. This includes things like equitable giving among the regions of the state, supporting organizations that address equity issues, and ensuring its own organization ... reflects the diversity of Oregon.” ■ “I’d support larger capacity building awards to groups that advocate and organize with low-income people and people of color.” ■ “More investment in policy advocacy by community-led and identified efforts; in community organizing as a means to foster civic engagement and make an impact on disparities in Oregon; in multi-year funding that is available to more organizations led by communities of color that use policy advocacy, community organizing and civic engagement strategies to have an impact on equity issues.” ■ “Stop filtering money to marginalized communities via intermediary organizations. Direct investment in rural and otherwise marginalized communities would be the most cost effective use of funds.”

APPENDIX E

EXAMPLES OF THE OREGON COMMUNITY FOUNDATION SUPPORT FOR COMMUNITIES OF COLOR (1982–PRESENT)

In response to NCRP’s finding that “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,” the foundation provided the following list, which it describes as “a few examples of OCF’s active interaction with and support of culturally specific and resident organizing efforts dating back to very early in the foundation’s history. This is not nearly a comprehensive list, merely a few examples of a pattern of engagement.”

1982: Linked The Black Consortium to Sources of Funding: OCF reached out to a consortium of Black organizations to create a pathway for new funding from private philanthropy. Eventually OCF reached out to all of Portland’s major foundations and corporate contributions committees to encourage support of The Black Consortium organizations. Said The Black Consortium leadership; “I think we have before us an opportunity to plan and propose programs that speak to the priorities of our community.” And, “The response thus far has been overwhelmingly positive.” One year later, \$1,630,000 in grants had been made to minority organizations by those foundations and corporations.

1985–89: Ran the Neighborhood Small Grants Program: In partnership with the C. S. Mott Foundation, OCF invested \$265,000 in grants to 36 citizen-led neighborhood groups for citizen organizing. These were low-income and minority groups organizing around issues such as land use, neighborhood livability, child care, crime, economic development, etc. There was an active advisory council made up of grantees. To quote from the project evaluation conducted by Rainbow Research in December 1989:

“Citizen-based organizing, as possibly distinct from neighborhood-based organizing, became an important theme of Oregon’s program. ... New organizing strate-

gies: ... to support a primarily church-based coalition focused on grassroots leadership development and neighborhood and citywide civic action... ... Most of those involved had not been involved in existing, city-certified neighborhood associations.”

1986: Organized the Community Arts Endowment: OCF initiated an effort to raise \$1,000,000 to support small- to medium-sized arts organizations throughout Oregon, with particular emphasis on minority, rural, tribal and county-based arts activities.

1987: Sponsored the Citizen Leadership Conference: Several hundred people attended the conference focused on citizen organizing and advocacy.

1990 to 1996: Created and Ran the Neighborhood Partnership Fund: OCF, with initial support from the Ford Foundation, OCF created and ran the Neighborhood Partnership Fund to “enlist multiple corporate, governmental and private philanthropic sources to support community-based activism across the spectrum from neighborhood organizing to housing and economic development.” During the years the foundation ran the Fund, it generated millions of dollars in investment and resulted in the creation of several culturally specific community development

corporations. Eventually the organization spun off to stand alone, and still thrives today.

1987–Present: Helped Start and Grow the Black United Fund of Oregon: This culturally specific community foundation was founded with technical assistance and organization development grants from OCF. In addition, the OCF CEO and vice president for development personally mentored the organization's executive directors for many years.

1980s–Present: Partner and Funder for Self Enhancement, INC (SEI): This is probably Oregon's preeminent culturally run, culturally specific youth development organization. OCF has been a supporter since the very beginning of the organization and has partnered on many projects. In 2007, SEI needed capacity building funds in order to meet national accreditation standards. OCF provided consultation and \$150,000 in grants.

2002–Present: Mentor and Supporter of Salem Keizer Coalition for Equality: This Latino-led social justice group focuses on parent empowerment and closing the achievement gap for Latino kids using classic community organizing, protest and advocacy tactics. Its founder Eduardo Angulo often publically and enthusiastically attributed the success of the organization to OCF's friendship. An OCF board member provided many years of mentoring for the organization about how to effectively engage the school system – and the organization became a much greater change agent as a result. OCF is the largest and most consistent supporter of the organization and has provided significant grants every year since 2006.

2006–2009: Fundraiser for The Hispanic Chamber of Commerce Latino Scholarship Fund: OCF's CEO Greg Chaillé personally approached several donors inside and

outside OCF to raise money for the Latino Scholarship Fund, ultimately raising over \$100,000 in permanent endowment.

2012–2014: Leader of Oregon's Philanthropic Support for DACA and DAPA: In 2012–13, OCF spearheaded a funders collaborative to establish a rapid response for the implementation of DACA. The Meyer Memorial Trust, the Collins Foundation, MRG, the Columbia United Way of Mid-Columbia, Vibrant Village and the Northwest Health Foundation joined OCF in a pool of dedicated funds to support seven nonprofit organizations to respond DACA implementation. All the funders, including OCF, deviated from their standard grantmaking process to support the rapid response. The grant investment from all the funders was \$210,674. OCF contributed more than 50 percent of the awarded funds.

With the announcement of DAPA and the extension of DACA in November 2014, OCF reconvened the collaborative funders and explored their interest in further support. In this second round of funding, this collaborative supported nine organizations covering most of the state with a total grant investment of \$335,377, which included a \$75,000 match from Grantmakers Concerned for Immigrants and Refugees. With the legal challenges to the implementation of DAPA, OCF and its collaborating funding partners have offered the flexibility to groups to adjust their projects. None of this would have happened without initiation and leadership by OCF.

While OCF does not have a specific immigration support grant portfolio, OCF has for the last 12 years supported immigrant serving organizations such as Causa, Salem Keizer Coalition for Equality, CAPACES Leadership Institute, and the Willamette Valley Law Project that supports the work of the farmworkers union.

APPENDIX F

THE OREGON COMMUNITY FOUNDATION STAFF AND BOARD DEMOGRAPHICS BY GENDER, RACE/ETHNICITY AND SEXUAL ORIENTATION, DECEMBER 2015

STAFF

OCF employs more than 80 staff members. Staff are organized within seven departments: Development, Donor Relations, Executive, Finance and Fund Services, Grants and Programs, Gray Family Foundation and Research. The demographics of OCF staff are as follows:

- **Race/ethnicity:** 70 percent identify as Caucasian (only, no other race/ethnicity selected) and 30 percent identify as any other race and/or mixed race
- **Gender:** 84 percent female and 16 percent male or other gender
- **Sexual orientation:** 90 percent heterosexual and 10 percent gay, lesbian, bisexual or other

BOARD

OCF has 15 members on its volunteer board of directors. The demographics of OCF board members are as follows:

- **Race/ethnicity:** 67 percent Caucasian and 33 percent any other race
- **Gender:** 60 percent female and 40 percent male
- **Sexual orientation:** Not collected for board

Source: The Oregon Community Foundation. Due to the small number of staff in certain categories and in order to protect confidentiality, OCF did not provide more detailed breakdowns.

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ABOUT PHILAMPLIFY

Philamplify is an initiative of the National Committee for Responsive Philanthropy that aims to maximize the impact of our country's grantmakers. At the center of Philamplify is a series of comprehensive reports conducted by highly regarded researchers assessing foundation grantmaking and operations. Assessments include key findings and recommendations, along with in-depth analysis of foundations' funding strategies and feedback from peer funders, nonprofit leaders, issue experts, community members and more. By making these assessments public, Philamplify seeks to build a culture of transparency, mutual accountability and knowledge sharing.

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