

The John R. Oishei Foundation Strategic Planning

Staff Data Chew

February 17, 2023

A 'pre-read' for February 23

External Assessment Consulting Team:

Rachel Mosher-Williams, rmosherwilliams@gmail.com

Sandhya Chari, sandhyachari@gmail.com

Objectives

- Continue processing together the root causes of racial inequities in Buffalo
- Delve more deeply into strategies deployed by other place-based foundations centering racial equity and community
- Advise consultants on usefulness/applicability of peer foundations' experience to Oishei's strategic options
- Practice elements of a learning organization



Agenda

[9:40am] **Welcome**, warm up, objectives, & agenda

[9:50] **Discussion of disaggregated data and other pre-read materials**

- What feels especially relevant for Oishei going forward?
- What is feeling challenging or uncomfortable?
- How would you advise us to guide the Board through these data?

[10:50] *10-minute Break*

[11:00] **Small Group Working Session - Reflect on profiles**

- How does this fdn answer some or all of Oishei's big strategic questions?
- What would a similar approach/strategy/set of values look like in our context (culture and region)?
- What advice/questions do we have for this fdn?

[11:45] **Gallery Walk and Full Team Debrief**

- What would it take for our team to adopt the most relevant aspects of the peer foundations' approaches?
 - *What would our team need to learn, improve, add?
 - *What are the applicable strengths already in place?
 - *What *scares* us? What *excites* us?

[12:30] **Break, lunch, continued discussions**

[1:00] **Close**

What is an equitable city?

Cities are equitable when all residents – regardless of race/ethnicity, nativity, family income, neighborhood of residence, or other characteristics – can fully participate in the city’s economic vitality, contribute to its readiness for the future, and connect to its assets and resources.

Strong, equitable cities:

- Possess **economic vitality**, providing high-quality jobs to their residents and producing new ideas, products, businesses, and economic activity so the city remains sustainable and competitive.
- Are **ready for the future**, with a skilled, ready workforce, and a healthy population.
- Are **places of connection**, where residents can access the essential ingredients to live healthy and productive lives in their own neighborhoods, reach opportunities located throughout the city (and beyond) via transportation or technology, participate in political processes, and interact with other diverse residents.

Source: *Advancing Health Equity and Inclusive Growth in Buffalo*, PolicyLink and USC Prog for Environmental & Regional Equity, 2015.

Data on Race and Economic Exclusion in Western NY and Buffalo

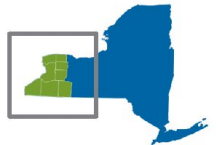
Research shows that **institutional racism, economic exclusion, and poverty are at the root of most issues facing people of color in WNY. These issues are particularly stark in Buffalo Niagara.** Data shared here illustrate the significant racial disparities that impact economic mobility and wealth accumulation:

- WNY snapshot: Population demographics and poverty rate (slides 6 - 7)
- Buffalo Niagara deep dive: (slide 8)
 - Income and basic health indicators (slide 9)
 - Geographic concentrations of poverty - spatial segregation (slide 10)
 - Issues deeply related to poverty:
 - Children in poverty (slide 14)
 - Unemployment rate and labor force participation rate (slides 15 - 16)
 - Earnings and income (slide 17 - 18)
 - Homeownership (slide 19)
 - Educational attainment (slides 20 - 21)
 - Entrepreneurial ecosystem (slide 22)
 - Community perspectives on most pressing issues (slides 23 - 25)
- The economic and social benefits of racial economic inclusion are also important to acknowledge, and are illustrated as well. (slides 26 - 29)

Data also shows funding in WNY and trends in the funder landscape. (slides 30-31)



■ Western New York
▨ Buffalo-Niagara Metro Area



Western NY is majority-white, Erie County is most diverse

<i>Population, 2017</i>	White	Black / African American	Native American	Asian	Hispanic
Allegany	95.4% (46,701)	1% (494)	.2% (97)	.9% (451)	1.4% (670)
Cattaraugus	91.9% (73,849)	1.2% (966)	2.9% (2,361)	.7% (524)	1.7% (1,345)
Chautauqua	89.3% (120,463)	2% (2,763)	.4% (576)	.5% (676)	6.1% (8,241)
Erie	77.7% (714,156)	13% (119,916)	.6% (5,199)	2.6% (23,621)	4.5% (41,731)
Genesee	91.5% (54,990)	2.5% (1,491)	1.1% (661)	.6% (355)	2.7% (1,616)
Niagara	87.3% (188,907)	6.7% (14,511)	1% (2,135)	.8% (1,807)	2.2% (4,694)
Orleans	87.8% (37,658)	5.5% (2,368)	.5% (199)	.5% (173)	4.1% (1,757)
Wyoming	90.2% (38,042)	5.3% (2,233)	.2% (103)	.4% (156)	3.0% (1,244)

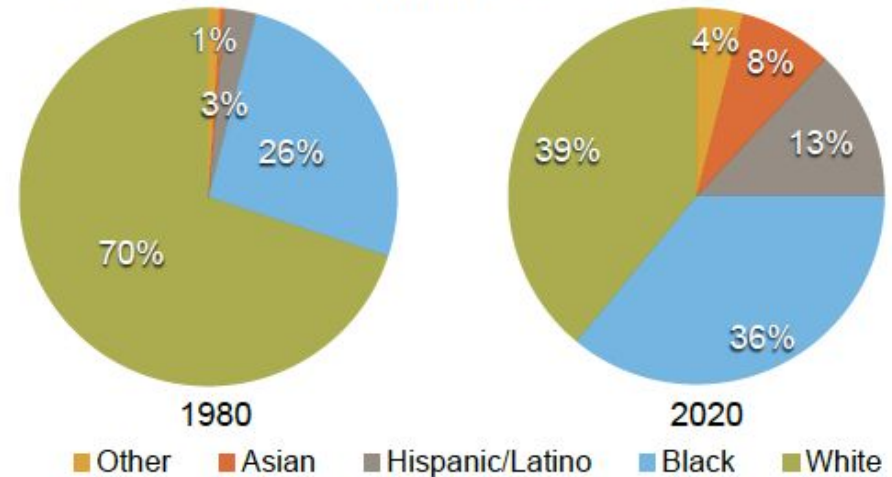
Even when in the minority, families of color experience poverty at higher rates than White families

<i>People experiencing poverty 2017</i>	Total	White	Black / African American	Native American	Asian	Hispanic
Allegany	16.8%	16.9%	49.7%	6%	9.6%	41.5%
Cattaraugus	18%	17%	23.5%	36.5%	17.1%	27.7%
Chautauqua	17.2%	17.2%	45.8%	47.0%	32.9%	48.4%
Erie	15.6%	9.4%	36.5%	24.9%	32.1%	38.2%
Genesee	13.4%	11.4%	53.4%	18.4%	28.6%	11.1%
Niagara	15.5%	10.8%	39.8%	30.9%	13.2%	27.0%
Orleans	14.2%	14.8%	21.2%	8.7%	32.6%	38.7%
Wyoming	13.3%	11.1%	56.5%	21.1%	33.8%	35.6%

Within Erie County, the Buffalo-Niagara metro area is becoming more diverse. The city includes the region's most residents of color.

- Like the nation, WNY is growing more diverse each year. The racial diversity of the City of Buffalo has increased significantly since 1980.
- Though people of color make up only 23% of the metro area's population as a whole, 34% of the region's youth are people of color. The City of Buffalo is much more diverse than the Metro Area. In 2020, 61% of residents identified as a person of color (figure at right).

City of Buffalo Racial Composition, 1980 & 2020



SOURCE: National Equity Atlas, U.S. Census Bureau

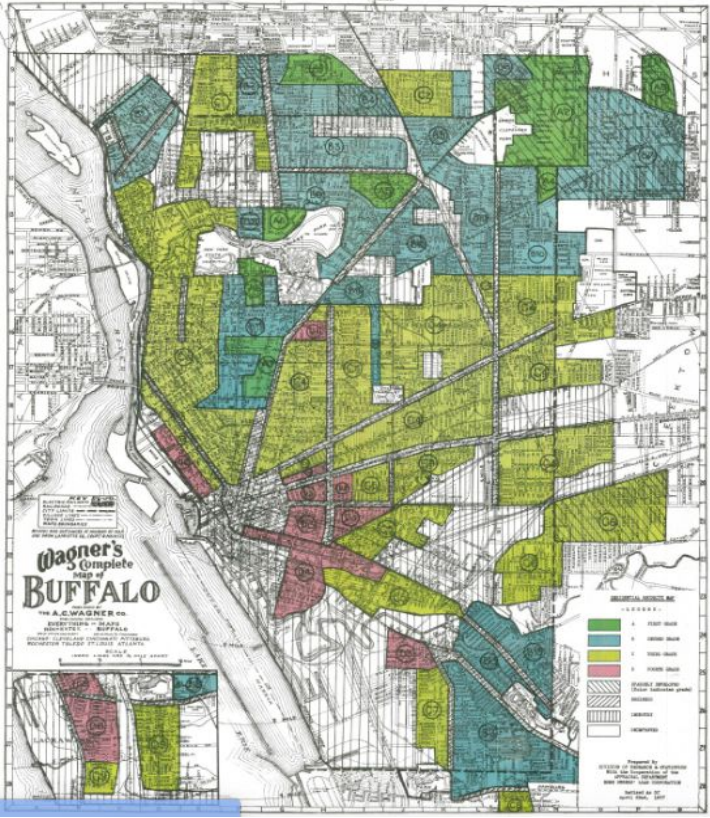
Aggregate indicators can mask significant disparities in status and outcomes by race (Erie County data)

(From 2022 Western NY Scan)

TABLE 11
Disparities in Situatedness Health Indicators by Race/Ethnicity, 2017-2019

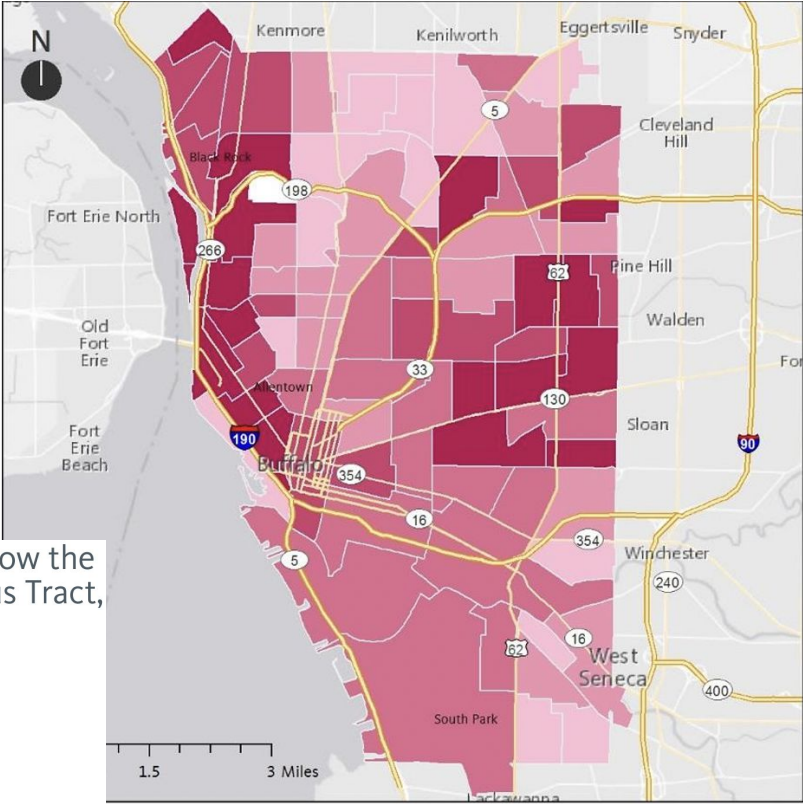
Erie County	Total	White	Black/ African American	Asian/Pacific Islander	Hispanic
Population (2018)	919,941	699,654	125,737	35,673	53,013
Percentage of population (2018)	100%	76.1%	13.7%	3.9%	5.8%
Median annual household income in U.S. dollars (2015-2019)	\$58,121	\$65,710	\$31,402	\$50,725	\$31,298
Percentage of families below poverty (2015-2019)	9.8%	5.4%	25.9%	25.8%	32.8%
Percentage of premature deaths (< 75 years)	39.8%	35.8%	60.8%	50.8%	67.9%
Percentage of low birthweight births (< 5.5 lbs)	8.8%	6.9%	14.0%	8.2%	12.7%
Asthma hospitalizations per 10,000 population, age-adjusted	7.5	3.9	19.6	6.1	17.6

Poverty in Buffalo can be traced back to institutionalized redlining



Percent Population Below the Poverty Level by Census Tract, 2014

- Less than 17%
- 17% to 28%
- 28% to 37%
- 37% to 42%
- 42% or more



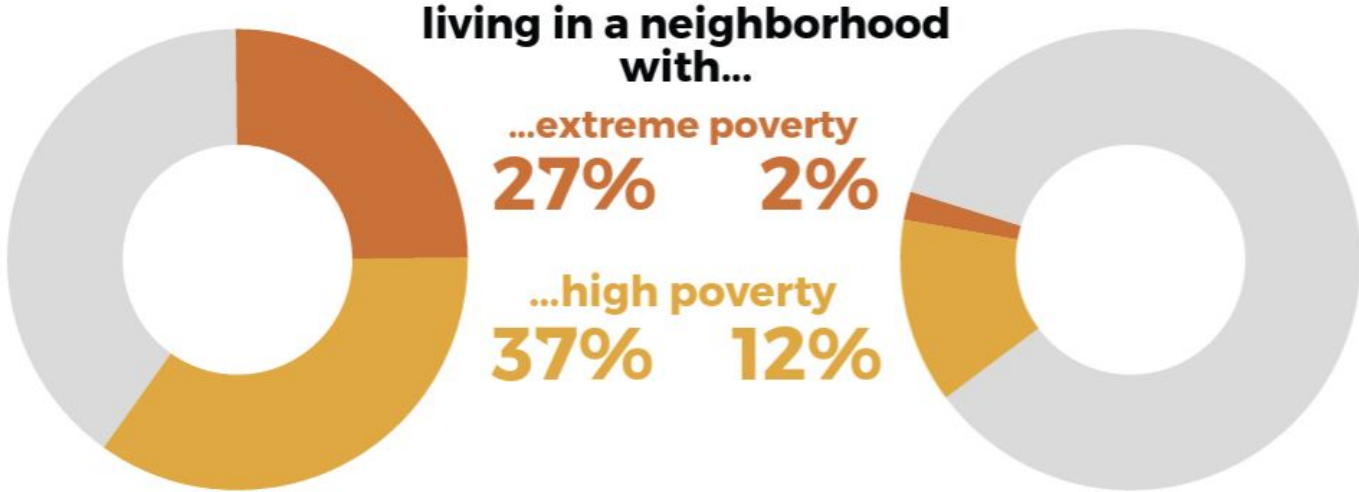
Source: *Advancing Health Equity and Inclusive Growth in Buffalo*, PolicyLink and USC Prog for Environmental & Regional Equity, 2015.

Spatial segregation has resulted in concentrated poverty in Buffalo Niagara

Buffalo Niagara Residents Living in Neighborhoods with Concentrated Poverty

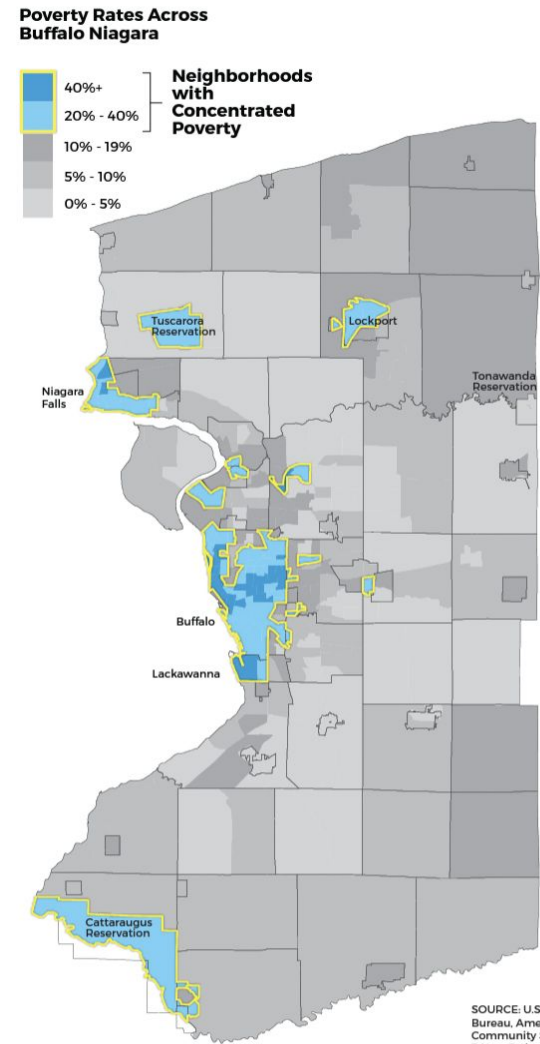
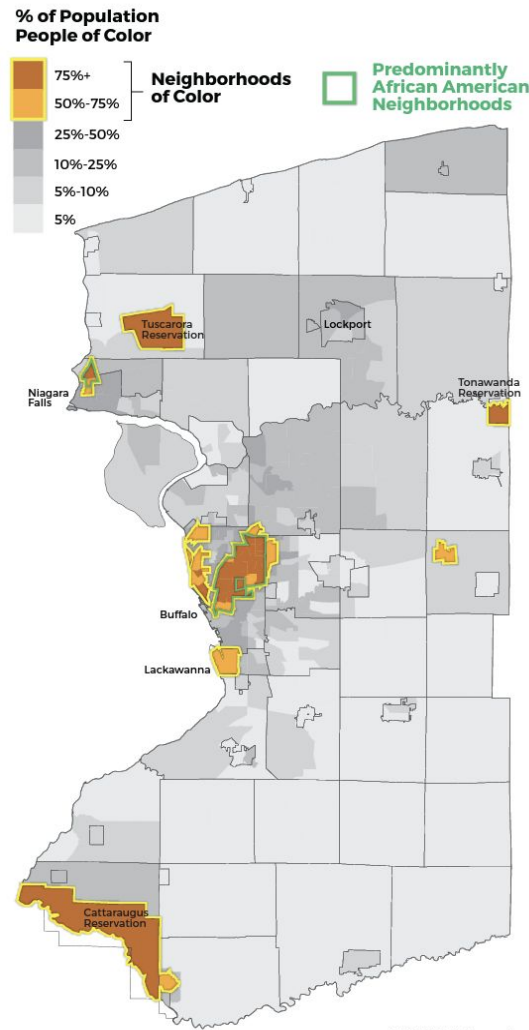
People of color

White population



SOURCE: U.S. Census Bureau, American Community Survey 5-Year Estimates, 2009-2013. See Data Notes for Graphs, Tables and Maps in the Appendix for further details.

Poverty is concentrated in neighborhoods with majority people of color



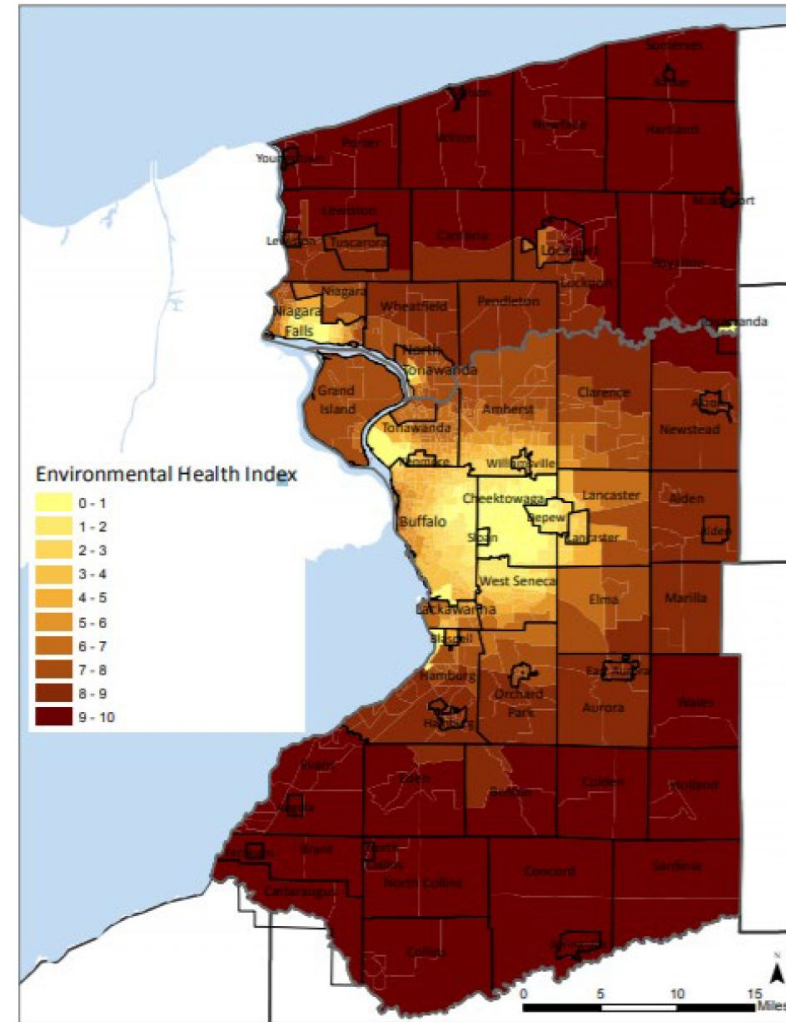
Environmental health disparities cause economic exclusion for People of Color

Residents in environmental justice communities are more likely to suffer health issues **leading to missed education and employment opportunities**. Black residents face the largest challenges of any racial group, followed by Hispanic/Latino communities.

Buffalo-Niagara Metro Area Environmental Health Index by Neighborhood of Residence

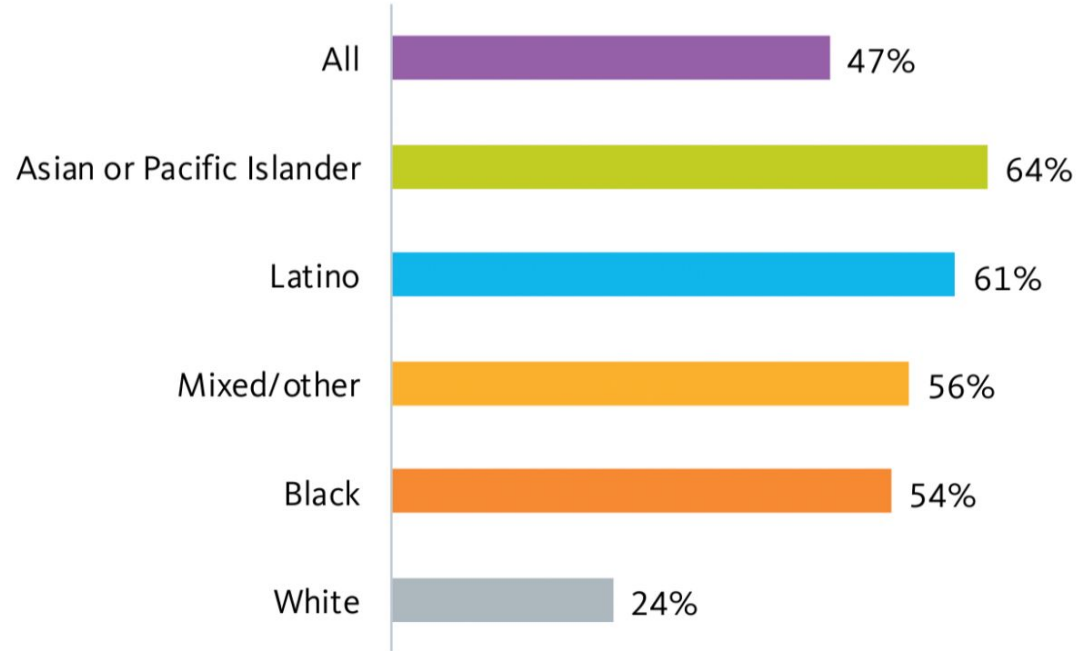
All Persons	White	Black/African American	Hispanic/Latino	Asian/Pacific Islander	Native American
7.3	7.7	5.7	6.8	7.3	7.9

SOURCE: Based on analysis within Fair Housing Equity Assessment, 2016. University at Buffalo Regional Institute. Based on a relative 10-point scale where 10 represents the highest environmental quality in the region.

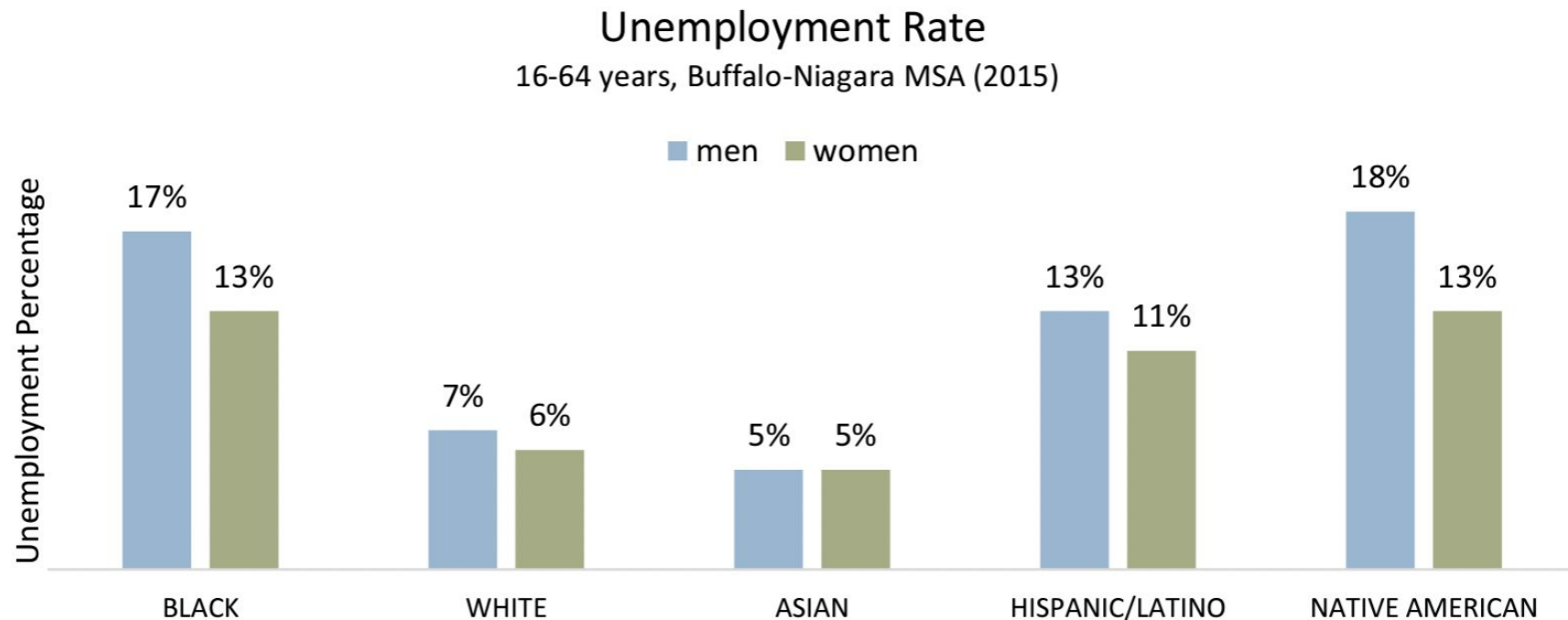


In Buffalo, children of color experience poverty at *at least* twice the rate of White children

Child Poverty Rate by Race/Ethnicity, 2014



By and large, communities of color experience much higher rates of unemployment



Source: U.S. Census Bureau, 2011-2015 American Community Survey 5-Year Estimates

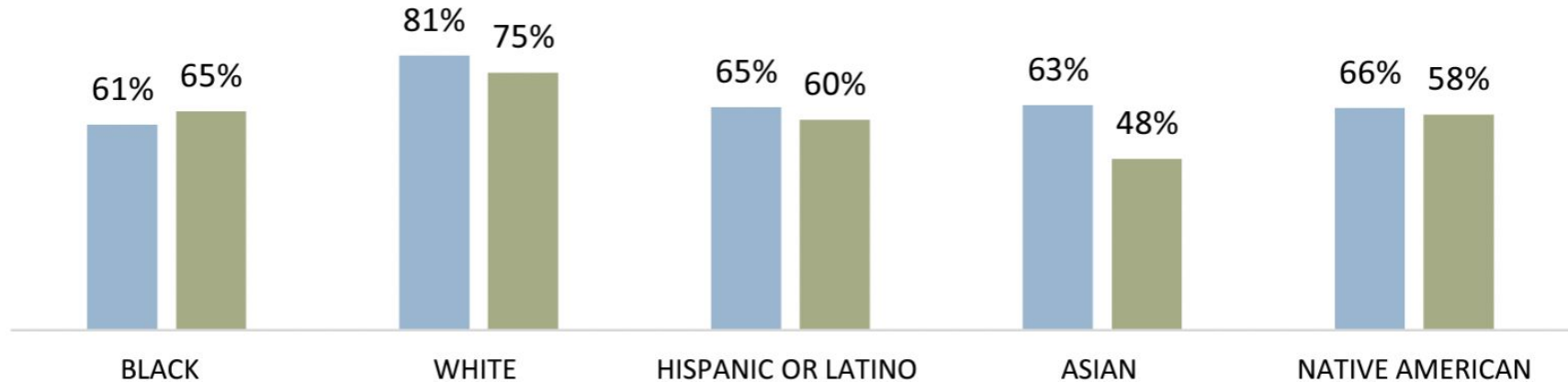
From *Racial Disparities in Buffalo-Niagara: Housing, Income, and Employment*, Robert Johnson and Clint McManus, Partnership for the Public Good, 2018.

Labor force participation is not as disparate - **the gap is in the earnings**

Labor force participation
16-64 years, Buffalo-Cheektowaga-Niagara Falls MSA (2015)

Labor Force Participation Rate

men women



Source: U.S. Census Bureau, 2011-2015 American Community Survey 5-Year Estimates.

From *Racial Disparities in Buffalo-Niagara: Housing, Income, and Employment*, Robert Johnson and Clint McManus, Partnership for the Public Good, 2018.

Workers of color earn less than their white counterparts, and across the board, those in the City earn less than those in the metro area

Median earnings differ by race, with white workers of the Metro Area and City earning more than workers of color. At current disparity levels, median-earning White workers throughout the Metro Area will earn \$550,000 to \$714,000 more than median-earning workers of other races and ethnicities throughout their careers.

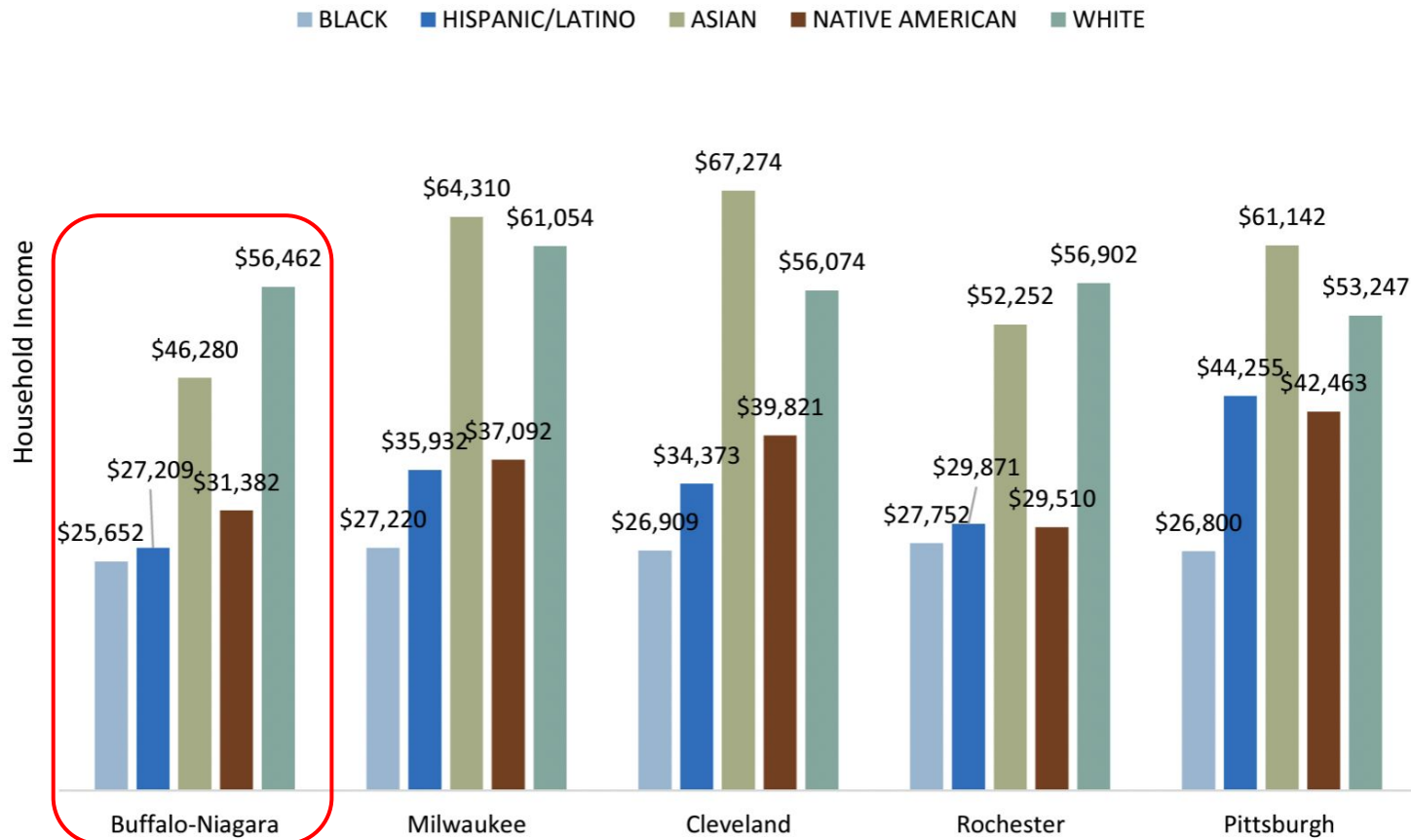
Median Individual Earnings by Race/Ethnicity, 2020

	American Indian/ Alaska Native	Asian	Black	Hispanic/ Latino	White (non- Hispanic)
Buffalo-Niagara Metro Area	\$22,743	\$24,669	\$26,835	\$26,747	\$40,584
City of Buffalo	\$21,360	\$18,727	\$25,539	\$24,163	\$35,241

SOURCE: U.S. Census Bureau 2020 ACS 5-year estimates

Western NY Scan, Community Foundation of Greater Buffalo, 2022.

Median Income, by Race/Ethnicity (2015)



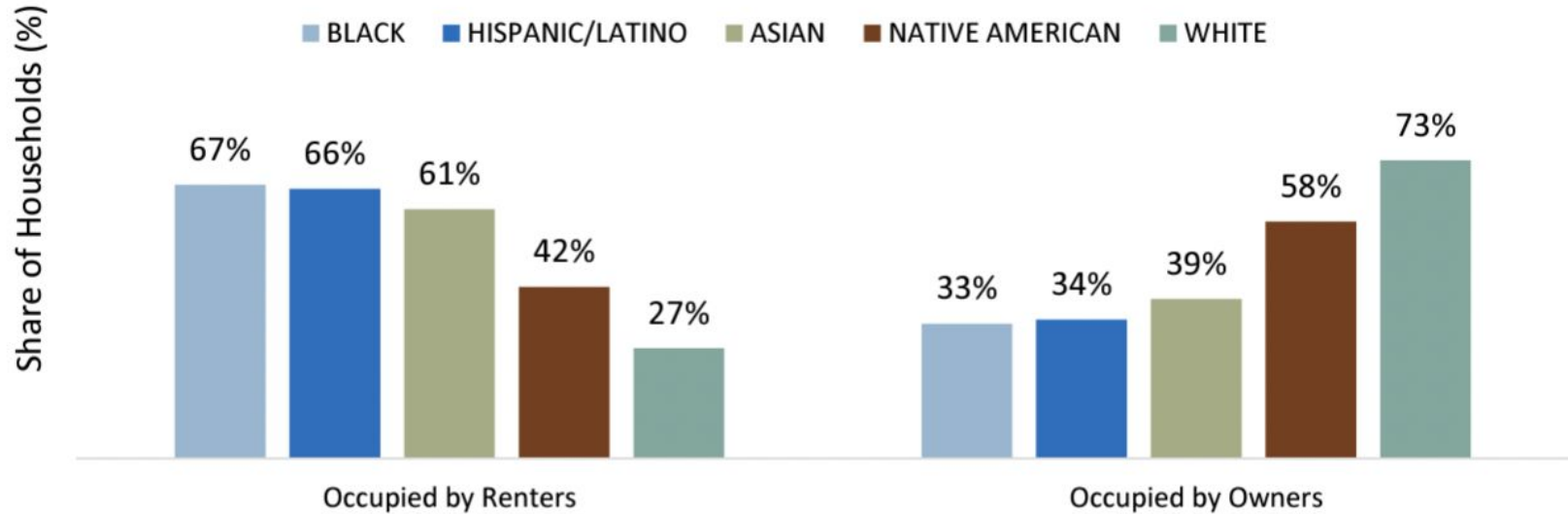
Source: U.S. Census Bureau, 2011-2015 American Community Survey 5-Year Est

From *Racial Disparities in Buffalo-Niagara: Housing, Income, and Employment*, Robert Johnson and Clint McManus, Partnership for the Public Good, 2018.

Homeownership is a good proxy for wealth & economic mobility - People of Color are much less likely to have such an asset

Share of Households Occupied by Renters vs. Owners

Buffalo-Niagara MSA (2015)

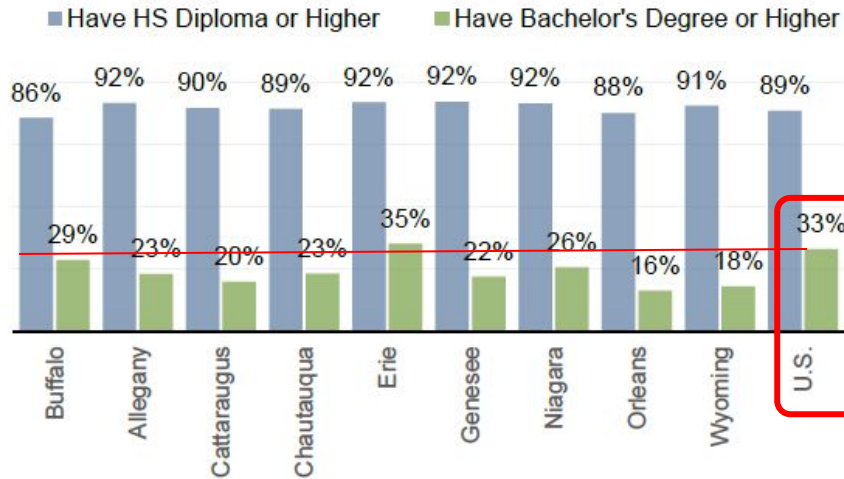


Source: U.S. Census Bureau, 2011-2015 5-Year American Community Survey

From *Racial Disparities in Buffalo-Niagara: Housing, Income, and Employment*, Robert Johnson and Clint McManus, Partnership for the Public Good, 2018.

Educational attainment affects income, employment stability, and a range of other factors.

Educational Attainment, 2020



SOURCE: U.S. Census Bureau 2020 ACS 5-year estimates

- The long-term economic health of WNY is highly dependent upon the educational attainment of its workforce.
- About 92% of the population 25+ in the Buffalo-Niagara Metro Area has graduated from high school, and 33% hold a bachelor's degree or higher. HS graduation rates in the City of Buffalo are slightly lower than across the 8 counties, but college attainment is higher.
- Educational attainment is tied closely to income and poverty status. In the City of Buffalo, **43% of individuals 25 years and over without a high school diploma had income below the poverty level. For Buffalonians 25 and over with a Bachelor's degree or higher, only 10% are in poverty.**

More people of color are obtaining college degrees in Buffalo-Niagra, but the disparity with White peers is striking

Percent of College Degrees Awarded by Race/Ethnicity

	2000	2010	2013
People of color	16%	19%	21%
Whites	84%	81%	79%

SOURCE: National Center for Education Statistics, Integrated Postsecondary Education Data System, 2000, 2010, 2013. See Data Notes for Graphs, Tables and Maps in the Appendix for further details.

The entrepreneurial ecosystem is developing but not fast enough or inclusively enough.

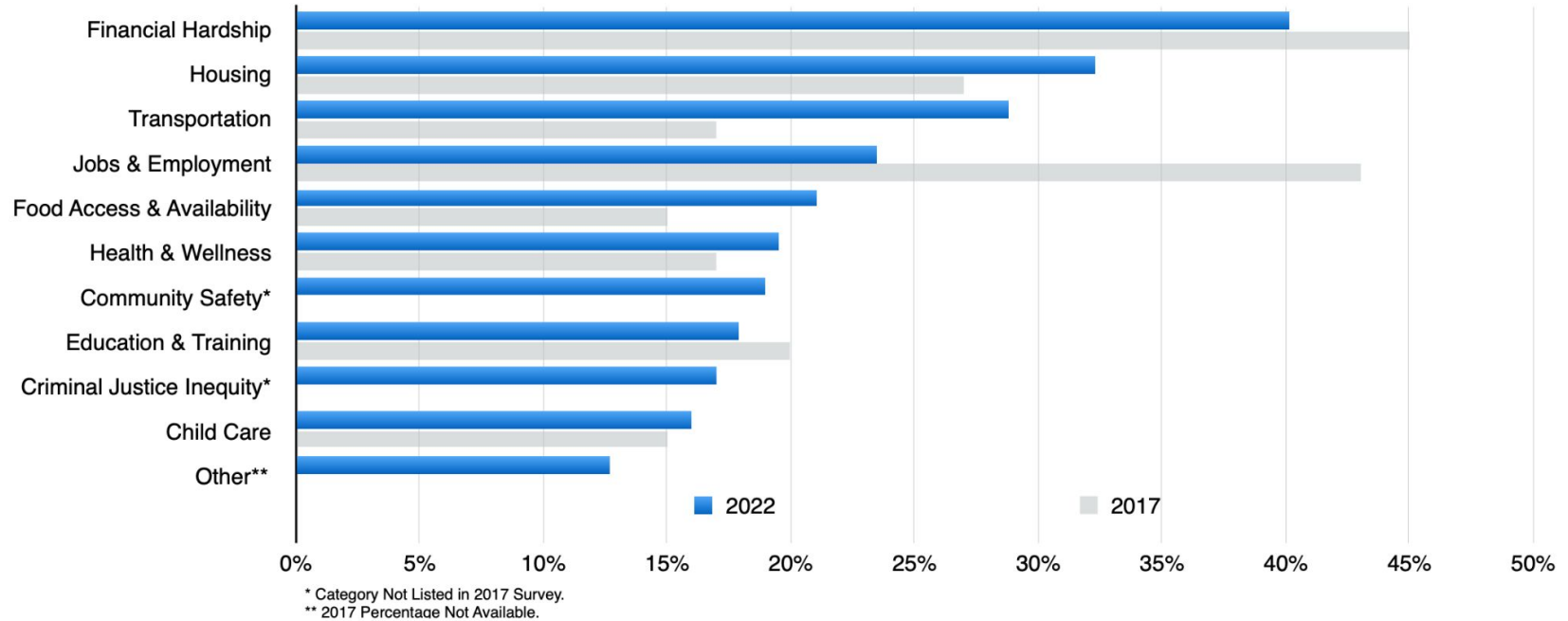
Challenges/Opportunities:

- Large corporations are absent
- An “old boy network” still runs the show
- Critical need for greater inclusion and diversity, including training for entrepreneurs of color at multiple stages
- Overdependence on a handful of programmatic funding sources, and disincentives to regional collaboration
- Highly disconnected ecosystem outside of core startup community
- Insufficient early stages of capital

“The systemic exclusion [in small business entrepreneurship] should be considered an economic emergency. It endangers the long-term economic health of the region and addressing this problem should be elevated as a high priority. Beyond the threats to social and economic justice, this deficit limits the long-term growth of the region.”

Community members report that financial hardship is the most pressing issue they face

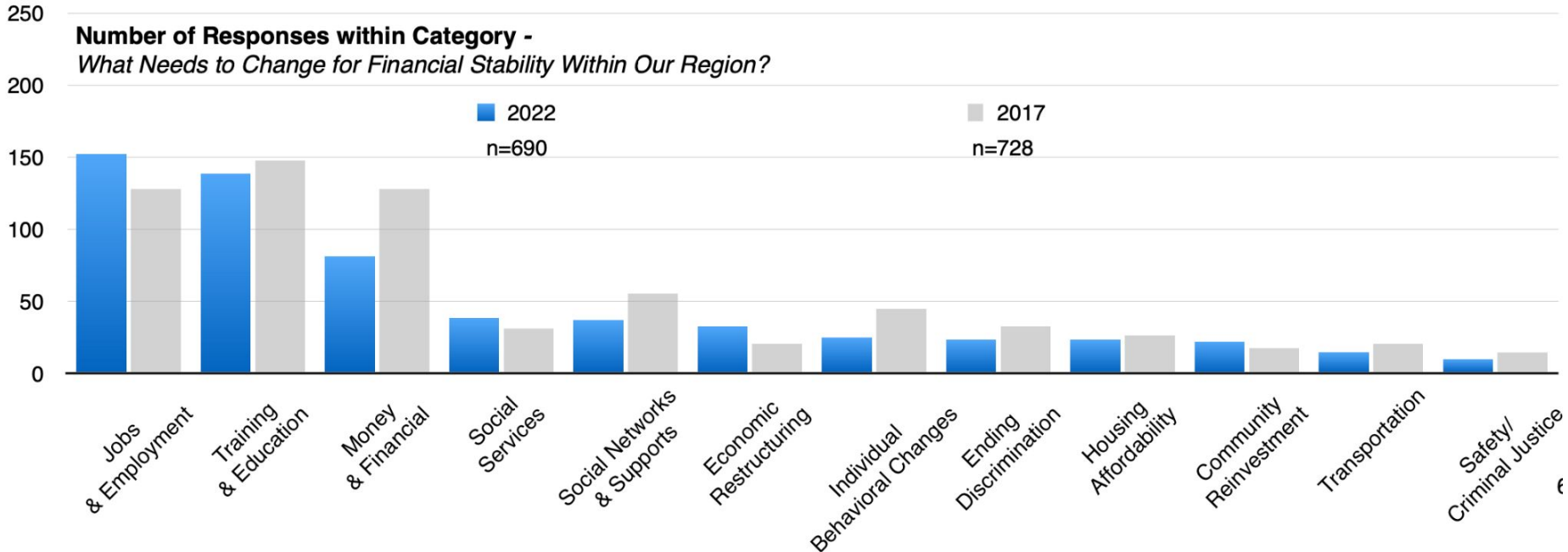
Respondents Identifying Issue as a Pressing Challenge



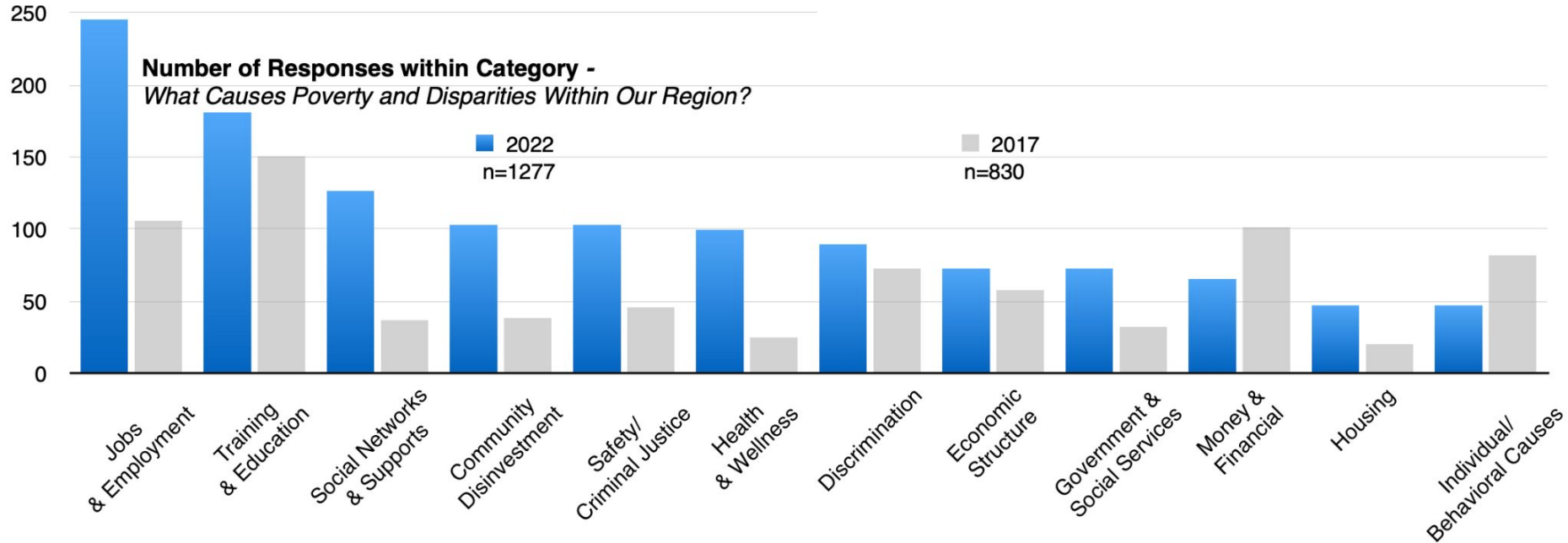
* Category Not Listed in 2017 Survey.

** 2017 Percentage Not Available.

Community members share that jobs & employment, along with training & education, need to change for their financial stability



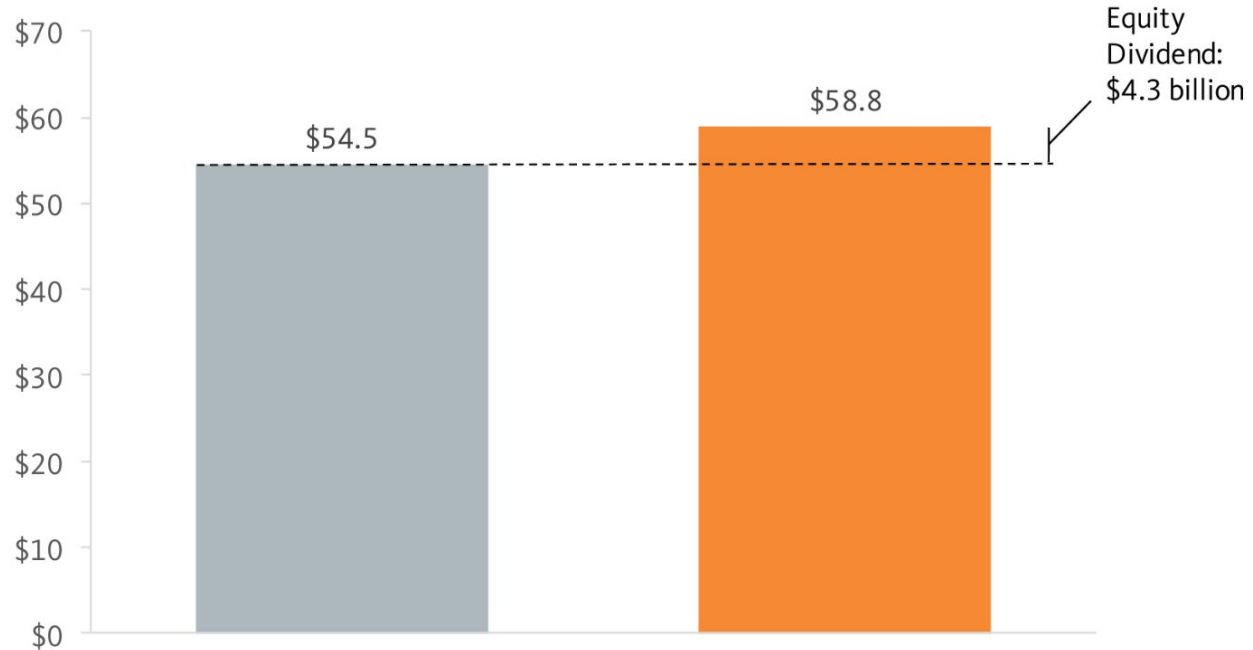
Community members share that jobs & employment and training & education are most responsible for poverty in the region



Buffalo metro GDP might be billions of dollars higher if racial gaps in income are eliminated

Actual GDP and Estimated GDP without Racial Gaps in Income, 2014

- GDP in 2014 (billions)
- GDP if racial gaps in income were eliminated (billions)



Closing racial equity gaps in specific areas, like education and wealth-building, would have many far-reaching effects:

Closing the racial equity gap in...

...education and job readiness would mean **over \$1 billion** in increased regional GDP annually.



...criminal justice would mean **nearly 54,000 individuals** with reduced barriers and enhanced access to workforce participation over the next decade.



...our neighborhoods would mean more than **36,000 additional families** purchasing a home.



...income and wealth would mean an **additional \$12 billion** in wealth for area families.



If there were no no statistical difference in outcomes for people of color and Whites, economic expansion would be vast

*The Racial Equity Dividend:
Buffalo's Greatest Opportunity,
Racial Equity Roundtable.*

Economic expansion leads to declining joblessness

When gaps are closed in employment and unemployment across Buffalo Niagara...

...an additional **61,606 individuals age 16+ will have a job or be self-employed,**

leaving the rolls of those who are unemployed or have dropped out of the regional workforce.

Wage increases support resident spending and mean higher earnings and returns on investments over a lifetime.

When wage gaps are closed in Buffalo Niagara...

...wages paid to people of color already in the workforce will **increase by \$627M,** reflecting an \$8,369 annual increase for every person of color in the workforce.

Projecting this earnings level across 61,606 individuals added to the workforce,

incomes are projected to grow by \$3.5 billion per year throughout the region.

The current \$8,369 wage differential between whites and persons of color **amounts to \$251,070 over a 30 year working lifetime.**

Economic impacts mean new jobs, businesses, and greater regional output.

Equity in workforce engagement, employment, and compensation would support...

...an estimated **19,200 additional jobs in the region**

It would also increase regional output by \$2.6 billion as restaurants, retail outlets, realtors, grocery stores, and more expand their footprint in areas of the region affected the most by this greater purchasing power.

If these newly created jobs were in new businesses, an estimated **3,628 additional businesses**

would populate the region based on the employment averages of existing young business in Buffalo Niagara.

If there were no no statistical difference in outcomes for people of color and Whites, wealth building would boom

Business performance benefits from diversity.

The region will realize additional gains as workforce diversity increases...

...racial diversity has been shown to lead to better business performance. Racially diverse businesses are more likely to have

higher than average profitability; higher than average market share; higher sales revenues; and more customers

than establishments with low levels of racial diversity.

A growing number of homeowners stabilize communities and contribute to regional wealth.

When gaps in lifetime earnings and credit access are closed...

...a projected **36,564 more individuals would purchase their own home.**

Home ownership is a key source of wealth accumulations for Americans and contributes to neighborhood stability.

Across the U.S., the median net wealth of homeowners is over 36 times as great as that of renters.

Wealth building contributes to resilience and benefits future generations.

If net worth for families of color was the same as that for whites...

...the region would be an estimated **\$12 billion wealthier** reflecting greater home equity, savings, and investment holdings which are currently almost eight times greater among whites.

Private philanthropy is present in and across all WNY counties

- The Foundation Center estimates **>\$375M/yr is distributed across WNY by local private, corporate, and community philanthropy.**
- National foundations, such as W.K. Kellogg and Robert Wood Johnson, as well as high-net worth donors like Mackenzie Scott, also support the WNY region.

Among the largest local funders (>\$10M grants/yr):

Mother Cabrini Health

Ralph C. Wilson, Jr.

M&T Charitable

KeyBank

John R. Oishei

Between \$1M-\$10M grants/yr:

Peter and Elizabeth C. Tower

Cullen

Highmark Western NY

Health Foundation for Western &
Central NY

Redlich-Horwitz

Cameron and Jane Baird

Margaret L. Wendt

National Grid

Patrick P. Lee

Western NY



“The biggest funder in WNY is New York state.”

- Over the last decade, the region has benefited from significant state and local investment. Many of the largest investments came in the form of the **Buffalo Billion Investment Development Plan**, colloquially referred to as the Buffalo Billion. The plan, developed by the WNY Regional Economic Development Council and released in 2013, identified six high-level strategies and the unique assets to move the five-county region (Allegany, Cattaraugus, Chautauqua, Erie, and Niagara) forward on the path to sustainable growth. Buffalo Billion II, a second phase of state investment, was announced in 2017.
- In April 2022, Governor Kathy Hochul announced the **Regional Revitalization Partnership**, a collaborative regional development strategy that includes a \$180 million private and public co-investment in East Buffalo. The investment will create new commercial corridors; fund improvements to existing destinations, such as the Broadway Market, Central Terminal, Michigan Street African American Heritage Corridor, and Martin Luther King, Jr. Park; and provide job training and placement for under- and unemployed residents.
- Like everywhere in the country, **local and NYS government are the largest funders of nonprofits (via service contracts)** in the region.

High-level takeaways

Buffalo Niagara has heightened indicators compared to all of Western NY:

- Western NY is made up of eight counties, all of which are majority White. Racism and poverty have been highlighted as being at the root of many issues communities face.
- Across WNY, poverty rates stand at around 15%. In all counties, White residents experience poverty at rates close to 15%, however people of color have much higher percentages experiencing poverty, even while they make up less than 10% of the population.
- While WNY overall is majority-white, the Buffalo-Niagara metro area has always had the largest population of Color in the region, and is becoming more diverse.

Due to historic (and continuing) institutional and systemic racism, poverty more adversely impacts people of color:

- Basic economic indicators are similar to national averages, however disaggregated data show significant disparities in economic mobility by race.
- Poverty can be traced back to institutionalized redlining and is still connected to spatial segregation in the City of Buffalo and in Niagara.
- People of color experience starkly higher rates of poverty in Buffalo, and while they are getting more educated and more are participating in the labor force compared to the past, earnings remain much lower than their white counterparts.
- People of Color are also not building wealth in similar ways; homeownership is a known proxy for economic mobility, and People of Color are much more likely to be renters than buyers (especially in comparison to Whites).
- While jobs are growing overall, there is a need for deeper investment in entrepreneurship and small businesses for more inclusive growth.

High-level takeaways

Community perspectives:

- Community members agree that the most pressing issue in Buffalo today is poverty, and, for that to change, there has to be an emphasis on workforce development and jobs.

Racial disparities hold back wealth for all:

- Racial gaps have significant impact on overall wealth, and if these did not exist, all would benefit. GDP, homeownership, individual wealth creation, and jobs would all increase significantly.

Funder ecosystem:

- Western NY has a unique funder ecosystem, with government playing a huge role. There are several foundations that make up the philanthropic space, and Oishei is one of the largest.

Foundation Profiles: Place-Based, Community-Centering



How to read the following foundation profiles

The six foundations featured here have all been on a journey to look at their strategies in new ways. Many have made decisions to center racial equity, narrow their focus, and/or sunset things they were doing previously. All are place-based foundations, and they all work closely with the communities they serve.

While none of them are exactly like Oishei, there are many similarities between their regions and Buffalo, and more importantly, there are several parallels between the paths they have been on and the one Oishei is embarking on now. Their leaders have openly shared challenges they have faced, and made note of the fact that this work is often messy and difficult.

They have done the work to make these transformations, and shared that Oishei is not alone in this. There is a community of foundations around the country making similar moves, all in service of more intentional impact.

Overview

	Bush Foundation, MN	Deaconess Foundation, OH	Ford Fdn, Detroit Program, MI	if, A Foundation for Radical Possibility, DC	Meyer Memorial Trust, OR	Ruth Mott Foundation, MI
Interviewed	Anita Patel; VP of Grantmaking	Cathy Belk, CEO	Kevin Ryan, Sr Prog Officer, Civic Engagement & Govt	Hanh Le, co-Executive Director	Jill Fuglister, Program Director	Raquel Thume, CEO, Raquel Robinson, VP of Programs
Website	https://www.bushfoundation.org	https://deaconessfdn.org	https://www.fordfoundation.org	https://www.iffdn.org/	https://mmt.org/	https://www.ruthmottfoundation.org/
Type	Private independent	Hospital conversion; private ind	Private Independent	Conversion from an HMO sale, private independent	Private independent	Private independent
Founded (yr)	1953	1944	1936	1995 (Consumer Health Fdn), became <i>if</i> in 2021	1982 (1990, renamed Meyer Memorial Trust)	1999
Assets	\$1.5B	\$61.6M	\$17.8B	\$26M	\$740M	\$237M
Annual grants	\$120M	\$1.5 million	\$900M	\$1.5M	\$40M	\$7M
Region	<u>Minnesota, North Dakota, South Dakota and the 23 Native nations that share the same geography</u>	Cleveland	Detroit	Washington, DC region - covering all of DC, northern VA, southern area of MD near DC	The State of Oregon	North Flint only (represents a pivot in the last few years)

Overview

	Bush Foundation, MN	Deaconess Foundation, OH	Ford Fdn, Detroit Program, MI	if, A Foundation for Radical Possibility, DC	Meyer Memorial Trust, OR	Ruth Mott Foundation, MI
Grantmaking areas	<ul style="list-style-type: none"> 1. Community innovation 2. Leadership 3. Strategic initiatives 4. Communications 	<ul style="list-style-type: none"> 1. Direct – helping people launch into a career path 2. Pipeline – develop the pre-conditions for employment. 3. Systems – Target policies, routines, relationships, resources, and power within workforce development. 	<ul style="list-style-type: none"> 1. Community based leadership and mobilizing 2. Affordable housing and equitable development 3. Shifting the narrative through journalism, creative arts, and story-telling 4. Strategic partnerships across sectors 	<ul style="list-style-type: none"> 1. Community Power 2. Culture (shifting narratives abt anti-black racism) 3. Healing Justice 4. Institutions and Structures 5. Reparations and Economic Justice. <p>Average grant size: \$15-30k per year. 50% participatory grantmaking.</p>	<ul style="list-style-type: none"> 1. Strengthening transformative movements 2. Transforming existing systems and institutions to achieve more equitable results 3. Providing responsive grantmaking to and for BIPOC communities with culturally specific strategies. 	<ul style="list-style-type: none"> 1. Youth 2. Public Safety 3. Economic Opportunity 4. Neighborhoods

“We’ll take big bets and stay with you [grantees] for many years.”

Mission and Strategy

Mission:

We work to build a region that's better for everyone.

We work to inspire and support creative problem solving — within and across sectors — to make our region better for everyone.

Values:

- spread optimism
- work beyond ourselves
- everybody matters
- steward well
- more good. every year.

Equity statement; definition of equity, racial equity, racial justice:

To inspire and support creative problem solving, within and across sectors, to make our region better for everyone. The Bush Foundation is about place — a region of three states and 23 Native nations. This region’s future will be defined by how well every person in it does — at home, in school, at work and in the community. This region’s future, therefore, depends on institutions and systems that work well for all people. Too many do not. We are working to bring an equity lens to all that we do — from our major strategic priorities to the countless small decisions we make every day.

(<https://www.bushfoundation.org/equity-statement>)

Strategic plan link:

<https://www.bushfoundation.org/what-we-do>

Bush Foundation

“Place based and racial justice are interwoven. It’s all grounded in a place-based focus and has to center racial equity.”



Implementation

Systems Change:

1. Invest deeply in individual leaders who are operating in movements to create systems level change
2. Invite those applying for grants to share their dream of systems they want to change and realistically share what funding it will take to do that. Give multiple millions over many years if that's what it takes.
3. Giving beyond monetary investment. Using social capital to influence and look at policy shifts.
4. Ensuring the board is aligned to the vision of big bets over long-term to make systems change work possible.

Impact Investing:

<https://www.bushfoundation.org/impact-investing-statement>

Two main principles:

- 1) Place based equity: brings capital to firms in that region because they are overlooked. This work has been difficult, but as it has been nurtured, it is growing.
- 2) Women and people of color: they have built a strong practice around sourcing.

"If you're in the office too much, you're not doing your job."



Implementation

Community Engagement:

Their staff are in the community a lot. They have lots of advisory groups and community members making grantmaking decisions. Most staff have changed since 2014, and they have been hiring people from the community. As they moved into larger, long-term commitments, they established grant program partners in each of their areas as part of power sharing / power ceding. They each have millions of dollars now that they put out, and trust that they know how to use the funds.

Collaboration:

They have participated in some funder collaboratives and the Itsaca project (with government, corporate, and nonprofit partners), but many times they are willing to take risks others are not, so they work alone to help establish credibility for 'riskier' grants.

“There are so many hopes and so many fears in racial equity work. Know that it will be messy.”

Evolution and Advice

Key moments in their journey:

They are a 60 year old foundation, and had a big shift in 2014 when Jen (current President) came in. They started doing more deliberate equity work, and with George Floyd in their region, there was national attention. They named a focus around descendents of slavery and made long-standing commitments in the black community. They made \$100M reparative spirit commitment to the black and native communities, as well as \$50M to generational wealth building in BIPOC communities because of generational systemic harm.

They acknowledge that their work says 'equity' when now they would like it to say racial equity. They also recognize that there has to be some bridging with rural communities who identify differently with this issue to show that it isn't political and that they can have conversations about race.

Sunsetting or narrowing focus:

They did have to sunset some major initiatives that they had committed to for a decade. They were clear about principles and values for why the shift was happening, and this led them to be transparent. Not everyone was happy, but they did transition support. This started a new era for the foundation, and connection with community. Then three years ago, they simplified again so to be 100% open as a foundation where there were no back-door entries. This became an extension of their equity commitment, and was simple for the community as well.

Advice for Oishei:

Happy to be in community with them (Oishei), particularly as they have struggles, happy to speak with anyone there. Having a community is helpful. Transparency internally and external - why are we doing what we're doing. what are we struggling with and where are we going. Even internal work is such a cycle. If you're making a long commitment, how are you institutionalizing it.

Deaconess Foundation



"We need to be taking all the risk and giving money out as fast as we can to the community who are actually taking all the risk. "

Mission and Strategy

Mission:

Deaconess Foundation helps people in need build careers that sustain them and their families.

Values and Beliefs:

We believe that people have the inherent capacity to effect positive changes in their lives, in their organizations, and in their communities. We believe continuous learning is necessary to carry out the mission and maximize the impact of our work.

Our work embodies these core values: impact, integrity, and collaboration.

Deaconess Foundation



"The way to make change is through advocacy, relationships & private sector. We spend all our time with partners & philanthropy in workforce development. That is why we have emerged as leaders in this space."

Mission and Strategy

Roles and Levers to Accomplish Strategies:

- Leading: We lead as changemakers
- Collaborating: We work in partnership for impact
- Grantmaking: We commit financial resources to advance our mission
- Racial Equity: Advance it through our practices
- Communications: Use communications to maximize the impact of our strategies
- Advocacy: Educate and build relationships to influence government leaders and policy makers

Racial Equity:

Racial equity has been a strategy, but not embedded in the work. They are working to change that now in their current strategic refresh process. To date, trustees have been hesitant, perhaps due to overly trusting decisions of past board members, and partially due to implicit concerns about changing the white dominant culture (even for trustees of color). Some are of the belief that learning about racial equity is the same as doing the work, but they want to shift that view now and take more action.

Strategic Plan Link:

<https://deaconessfdn.org/strategy/>

Deaconess Foundation



“Went from making lots of small basic needs grants to having a singular focus on workforce development. Can have more impact as a big fish in small pond as opposed to doing a little of everything.”

Implementation

Systems Change:

Three major strategies: capacity in the ecosystem, supporting non-profits in workforce development, and systems change. To work on systems change, they work on three key things: leadership, advocacy, and communications. They’ve led or been a part of a leadership group to raise \$20M for systems change initiatives. In workforce in their county it's huge and much bigger than their grantmaking. That gives them a position of stature from which to advocate. That brings more resources.

Collaboration:

They have a funder alliance with a pooled fund from public, private, and philanthropic participants. Public sector is the biggest player, so they had to involve them in the work. It is important to be doing something the public sector cares about for that work to move forward, and right now, workforce development is top of mind for everyone.

They have worked as part of multi-funder collaborative to learn together how to work more effectively with government. They engaged in advocacy capacity building for themselves along with a consultant and a group of foundations who understand that dynamic of how to work with government effectively. This group capacity building approach was a new concept but very effective. The group picks something that's coming up on policy, and go and meet with policy makers to do education. That raises the profile of philanthropy.

The racial equity learning circle is less impactful. Everyone was enthusiastic when it was just sharing, but when funders had to make plans and commitments, many dropped out.

Deaconess Foundation



"If you want to make change more broadly than just grants - need people who are aligned to this vision who can make calls to move people. ."

Evolution and Advice

Key moments in their journey:

In the first 16 years, grantmaking focused on empowering people to become self-sufficient. In 2013, responding to shifts in philanthropy and the human service environment, they embarked on a new strategic plan. Deaconess Foundation entry into the employment space in 2014 was guided by a Learning Plan that helped focus on specific areas within the broad employment space, such as job preparation, barrier removal, and longer-term supports. Each of these areas positioned them to leverage their established relationships and understanding of the human services sector. In 2016, they began implementing a strategic framework for their employment work. Their work is now guided by the understanding that the best way to help individuals exit poverty is to support efforts that not only help them find employment but also enable them to enter into and advance along career pathways – established, progressive routes to family-sustaining wages. Board members are risk averse so change is slow, but since 2014 they have had this narrow focus to work on workforce development, and now the work is underway.

Sunsetting or narrowing focus:

They went from giving hundreds of small grants to large grants all focused on workforce development. They moved from being a community foundation to a private foundation so that helped them make the switch. They had to sunset grants but now they have much more impact in a single area. They are big fish in the small pond of workforce development, and feel it's meaningful because it is a real means to get out of poverty.

Advice for Oishei:

They need some allies to scale. Just the board might not be enough. Think about how to use power in a different way - the most important job is understanding that power. You might need someone to make 10 phone calls. Think about how to nurture and build these relationships as one of their strategies / tactics to accomplishing X or Y. Gives them the space to spend that time. Deaconess can be trusted friends in the space.



“Have to respect their [local residents’] knowledge about the community, trusting that they know the work and that they can make the decisions.”

Mission and Strategy

Mission:

We believe in the inherent dignity of all people. But around the world, too many people are excluded from the political, economic, and social institutions that shape their lives.

Approaches:

We believe that social movements are built upon individual leadership, strong institutions, and innovative, often high-risk ideas. While the specifics of what we work on have evolved over the years, investments in these three areas have remained the touchstones of everything we do and are central to our theory of how change happens in the world. These approaches have long distinguished the Ford Foundation, and they have had a profound cumulative impact.

Racial Equity:

Diversity, equity, and inclusion are core to our mission and to who we are as a foundation. To address the challenges of a complex—and increasingly diverse—world, we need to make sure every person has a voice and a seat at the table. While we strive to build a future grounded in justice, we know tackling inequality around the globe begins at home. We are committed to not only creating a diverse team where everyone feels represented and respected but also embedding these values across our work and philanthropy at large.

Strategic Plan Link (for Detroit work)

<https://www.fordfoundation.org/media/5989/program-one-pagers-cs-detroit-flowed-lc01b.pdf>



“A lot of it is about building trust. Recognizing power dynamics that exist - groups with resources have power. Being humble, naming that power dynamic and then having real dialogue about what community would really like to see.”

Implementation

Systems Change:

Requires patient capital - the key is in thinking about structural challenges - have to know the full scope, history, barriers. They're funding research on barriers to equitable development in Detroit. They've created a matrix with issues, power to address those issues, and approaches to address them. Can't be afraid to take them on and have a result in two to five years.

Collaboration:

There are 4 funds where they are collaborating. Started with finding common ground - they all had a similar perspective on what long-term transformation looks like, and they wanted to continue to learn. For some collaborations it's taken more time. For each, have to ask what is the risk tolerance for your institution to be a part of this. They want people to feel collectively they can have more risk tolerance than individually.

Community engagement:

It's a long-term strategy. Really thought about power - use deep relationships to ask tough questions - how do communities view power in the community, and how can they influence decisions to reclaim their neighborhoods and the direction the city should go in. City has a high poverty rate, and people don't feel they are benefiting from decisions. Critical to hear honest feedback - if everyone is saying positive things, likely there is a lack of trust, and having open dialogue in community is so important.

Ford Foundation

"How do you handle those conversations [on racial equity] so they remain open and people are willing to dig in much deeper into issues and come together to make uncomfortable decisions."



FORDFOUNDATION

Evolution and Advice

Key moments in their journey:

There is a really challenging historical current of racism and distrust of the philanthropic sector. Earlier philanthropic sector had been hesitant to change and acknowledge racial equity, but recently with three new philanthropic leaders, the culture is changing. They are the largest majority black city in the country, but despite that they didn't have a big movement after George Floyd as a philanthropic sector. They attended a meeting of foundations where a working group who didn't receive funding (due to fear of acknowledging racism) was invited to speak - that kind of feedback from a public critic was really powerful.

As a foundation they are still figuring out what racial equity means. Some are still defining it internally, and some are saying equity is one thing and power is another. While Detroit is majority black, the growing populations are actually latinx and other immigrant communities. The focus on racial equity in detroit hasn't permeated all levels of the organization yet.

Advice for Oishei:

Ask the board to have an open mind. how does the foundation address root causes for racial equity, and what does equity mean for Oishei. How does the foundation respond to unexpected challenges? What was the response to 5/14? We all need to ask how we address these issues.

Think deeply about their values and learning. Inclusivity as a value for oishei - what does it mean to include different perspectives. Innovation as a value - does working with govt limit supporting innovation? What does it mean to support innovation in buffalo? How does oishei know grantmaking has real impact on lives. In Detroit, they are thinking about a neighborhood vitality index - looking at what's changing in neighborhood.

if, A Foundation for Radical Possibility



“While our vision is utopic, it will not be achieved without a fight. Therefore, we will fight, and we will stand in solidarity with those who are also fighting for their lives.”

Mission and Strategy

Mission:

We achieve our vision by centering the leadership and expertise of Black people and people of the global majority in the Washington, DC region who live at the sharpest intersection of systems of oppression, in particular race, class and gender identity.

Vision and Values:

Black people and people of the global majority live powerfully, abundantly and beautifully in healthy, self-determined communities free of social, economic and ideological violence. We believe that truth-telling is a part of healing and that acknowledging past and current racial atrocities is integral to justice.

We carry out our work by adhering to the following values:

- We build trusting authentic relationships with communities, partners and colleagues where knowledge, power and resources are shared equitably.
- We are committed to innovation and risk-taking and embrace bold ideas that disrupt the status quo.
- We stand firmly with communities that have been most harmed by systems of oppression and support their ability to exercise power.
- We prioritize radical learning and share lessons to make way for progress and effective action.
- We acknowledge the inconsistencies and contradictions inherent in the philanthropic enterprise and aim to model the vision we believe is possible by ensuring that our own policies, practices and operations are transformative and reflect the values we hold.

if, A Foundation for Radical Possibility



“To build community power, we support community-based and nonprofit organizations that advance racial equity and justice by undertaking community organizing, community engagement and advocacy.”

Mission and Strategy

Racial Equity:

Racial equity is outcomes not being determined by race. But Justice is way more - truth telling, reckoning with truth through culture change, healing justice, community power building (where most of their grantmaking goes and all grantmaking is participatory), and changes in systems and infrastructure (govt leaders in DEI in municipalities, philanthropic sector in DMV), as well as direct reparations. Harm needs to be repaired so Black community can be made whole. The foundation calls for federal government reparations and also foundation reparations, recognizing how the aggregation of wealth has caused harm. Economic justice!!!

Strategic Plan Link: <https://www.ifdn.org/strategic-plan>

if, A Foundation for Radical Possibility



"There will never be racial or health equity without racial justice."

Implementation

Community engagement:

Foundation learning days - what lead to participatory grantmaking. Way to bring more people with lived experience of oppression into philanthropy broadly, as well as if specifically. Not staff of nonprofits but community members living day to day. Two Brown Girls (a firm) ran the series - capitalism, philanthropy, issues in the community - a learning journey that staff went on with members of the community. To bring them into philanthropy to change it. Happened in summer of 2018 or 2019. A few dozen community members participated and were trained in philanthropy and became pipeline for participatory grantmaking program.

Participatory Grantmaking Committee - open invite to those who were trained and also became pipeline for grantmaking committee at Weissberg. Guaranteed income pilot came from a community member, who approached the foundation after she lost her job as hospitality worker during COVID and had a GoFundMe idea. Wanted to raise \$30k and give if half of it to invest (had learned about fdn endowment). Yanique then took it to board who wanted to develop a Guaranteed Income Project, financed by impact investments of local philanthropy who would be willing to forego the interest to fund the Income. Still being developed and funded by grants rather than investment income, but in process. Amalgamated Bank, others came along to build the pilot that came from the community. The impact investing model didn't really pan out but some funders still really wanted to continue participating. "We have a risk capital in philanthropy. We should use it responsibly but if we don't fund it, who will?" We are getting some push back in some places - constantly checking themselves and partners on anti-black narratives. Tropes about poor people and black people. A lot of internal (among the most progressive people) anti-Black subconscious beliefs and even for POC about their beliefs.

if, A Foundation for Radical Possibility



"if supports [efforts] to transform how government resources are deployed, with the ultimate goal of disrupting and dismantling the public and private structures that perpetuate systems of extraction, greed and harm."

Implementation

Systems Change:

An area of grantmaking is specifically focused on Institutions and Structure: *if* supports government capacity building and local coalitions to transform how government resources are deployed, with the ultimate goal of disrupting and dismantling the public and private structures that perpetuate systems of extraction, greed and harm. Currently, *if* supports the Montgomery County Racial Equity (MORE) Network, the DC Initiative on Racial Equity and Local Government, and the recently incubated coalition, "Voices of Black Fairfax."

Collaboration:

Convene all Chief Equity Officers who work with municipalities - mostly Black women who get fancy titles, but not resources or power to do what they're supposed to do. Support system. Leadership Montgomery - support racial equity training for them. There's direct support to govt to help them fulfill commitments and also to alliances working to hold govt accountable to implement policy. Support both sides.

They decided that working with the corporate sector is too big of a nut to crack for them.

if, A Foundation for Radical Possibility



"I love how little we left unsaid in our materials and strategic plan. We are open about still learning!"

Implementation

Advocacy:

Foundation learning days were an opportunity to train the community on structural and political analysis, and the staff is continuing to educate themselves on this even further. They are also developing a hybrid (virtual and in-person) political learning academy - will be open to the community, esp the virtual elements. Targeted in person trainings will be for community members in network they engage.

Learning:

The plan includes an acknowledgment of what they're still trying to work out, of how to reconcile where the money comes from (racialized capitalism) - goal is to humbly describe what work they are still doing.

if, A Foundation for Radical Possibility



“What does it mean to be a Black-centered organization? That determination was centered around the belief that once anti-black racism is addressed, everything is better for everyone.”

Evolution and Advice

Key moments in their journey:

Founded as the Consumer Health Fdn almost 30 yrs ago through the sale of Group Health Assn, first HMO in country and first affordable health care for all folks. Early on, the fdn was focused on health equity, funding a lot around equitable health access. Like lots of funders going deep in issues like health/Social Determinants of Health, they discovered that they needed to be doing systems change work, supporting advocacy, etc. Still seeing the deep disparities for people of color (esp between Black and White folks), they decided to move from health equity to racial equity. Doing community power building and organizing while still labeled as the CHF was confusing to people, so they "rebranded" as if, a Foundation for Radical Possibility. Justice is their North Star - The outcome of their 2019 strategic planning process was not health equity, not race equity, but racial justice. Applied not just to grantmaking but also to internal practice and process.

Important threads - becoming community centered. This community-centered transformation was a STRUGGLE. What does it mean to put community members in charge? A very big challenge for some members of the board was around the participatory decision making. Even more difficult was the decision to compensate 4 members of the board who are called "community board members" and who are closest to the sharpest intersections of oppression. \$10k per yr for them but not other board members. THE biggest challenge was deciding what do we mean by community? 10 yrs ago, there were a lot of black people on the board but they weren't economically stressed.

To work this and other things out, the board and staff did a "[Verzuz](#)" series of discussions. Like a series of debates bringing pro and con perspectives but it still isn't settled.

if, A Foundation for Radical Possibility



“The values and vision that are espoused externally need to be invested in internally!”

Evolution and Advice

Sunsetting or narrowing focus:

They moved toward the 5 pillars (Community Power, Culture (shifting narratives abt anti-black racism, Healing Justice, Institutions and Structures, Reparations and Economic Justice) but moved away from any issue-specific funding. Don't do health funding specifically, for example. So haven't developed a stance on the criminal legal system and policy violence. It's a bit of an identity crisis for a Black-centered org and they're going to do some work on understanding and then identifying potential programs in that space.

Advice for Oishei:

Be careful to tend to staff feelings and fears. Can be particularly frustrating for staff of color. The values and vision that are espoused externally need to be invested in internally. People need to be treated humanely and guided through the change. (*if* did a survey of DMV philanthropy POC to understand areas of hurt and harm). Tend to your people!!!

If there are staff changes - think about the potential harm of talent poaching from area nonprofits. If bring people in from the nonprofit community, consider transition grants for them.

There isn't much philanthropy in Oregon, especially as compared to nearby California or Washington.

Mission and Strategy

Mission:

Meyer accelerates racial, social and economic justice for the collective well-being of Oregon's lands and peoples.

Vision and Values:

- Meyer is committed to **equity**, which we define as fair access to opportunities.
- We strive for **responsiveness and flexibility**, because we recognize that although the needs of Oregon evolve over time, there is value in multi-year and, in some instances, long-term commitments in order to bring about change.
- We value **collaboration**, because partnering with organizations, people and communities allows us to collectively identify and address key needs and opportunities.
- We aim for **humbleness**, which guides us as stewards and advocates of Meyer's legacy in all interactions with the community.
- We believe in **accountability and transparency**, because measuring our progress ensures our investments have meaningful impact. We hold ourselves accountable by actively **monitoring, evaluating and learning**.
- We promote **advocacy**, because we recognize its crucial function as a leverage point in systems change.

Meyer Memorial Trust



"We have had a lot of difficult conversations and are still in the exploration phase about "justice." Our journey has been steps forward, steps sideways, messy, moving forward but dealing with the change of it."

Mission and Strategy

Racial Equity:

All of our work is framed by our commitment to dismantling barriers to equity and improving community conditions so that all Oregonians can reach their full potential. We prioritize work that increases equity for and inclusion of Oregonians who experience disparities because of race, ethnicity, national origin, citizenship status, religion, gender, gender identity, sexual orientation, class, disability, geographic location or age. We have been on our own equity journey, and we will meet organizations and groups where they are in the continuum of their own equity journey. We ask all of our grantees to explore equity in the context of their organizations, and we challenge them to make progress on integrating equity in their work, partnerships, outreach, policies, staff and boards — just as we at Meyer have and continue to challenge ourselves.

Justice is about correction, and acknowledging how deep structural harm has been done to people and repairing. **Just getting to that now. They call themselves an aspiring "justice" funder because they aren't really doing reparations. Still mostly in the equity space. Haven't gone down the real road of acknowledging harm of philanthropy capitalism and land being stolen, etc. Have had a lot of difficult conversations and are still in exploration phase about "justice." Journey has been steps forward, steps sideways, messy, moving forward but dealing with the change of it.

Please review our [Equity](#) page for more information and to see practical resources and support.

Meyer Memorial Trust



“We now use questions like ‘is community voice driving the work you’re doing?’ ‘How do you work toward equity and justice?’ ‘How do you develop partnerships?’ So power building is implicit there.”

Implementation

Community engagement:

They use participatory grantmaking for Justice Oregon for Black Lives. In the past, programs have been designed by community but for Justice OR for Black Lives, the community recommends grants to the board who always approves them. It's a 5 yr commitment, they're in the 3rd year.

Systems Change:

Working definitions that ground their understanding of systems change and movement building: Systems are sets of interconnected parts - such as policies, practices, power dynamics and mental models - that have a collective function or purpose. [Adapted from FSG's Water of Systems Change and Systems Thinking for Social Change by David Peter Stroh] Movements are groups of people or organizations working together in coordination over an extended span of time to move a shared vision and pursue broad goals to transform society.

Collaboration:

Involved in many funder collaboratives: Most recently, Meyer joined Oregon Community Foundation and The Ford Family Foundation in creating the Community Rebuilding Fund to invest in recovery and rebuilding for Oregon communities devastated by wildfires in 2020. This collective fund centers the most vulnerable Oregonians, and funding strategies are being developed with deep community engagement.

The Oregon Immigrant and Refugee Funders Collaborative has worked since 2016 to address emerging and urgent issues impacting immigrants and refugees across the state with a coordinated and nimble approach for rapid response grantmaking. Funders include The Collins Foundation, MRG Foundation, Oregon Community Foundation, Pride Foundation and Meyer.

Meyer Memorial Trust



“We experienced feedback suggesting that Meyer didn't care about rural areas anymore because we were becoming more race equity focused. It was a false notion”

Implementation

Impact Investing:

They have done impact investment (was actually an early adopter of MRIs) but it has been kind of on hold for a while. Previous CEO and CIO wanted to intentionally explore a pivot but it got stalled. They have a handful of PRIs and a Real Estate IT (REIT?) for affordable rental housing development. A bit going on with an aspiration to reboot. A lot of the investments were made a longish time ago. More recent ones have justice elements - she manages a PRI to a CDFI to make conservation bridge loans for a specific building. Have tried to sync it up more with equity commitment - language in agreement that work with tribes and marginalized folks should be prioritized.

The Trust endeavors to invest in ways that lead to financial and operating stability and growth of the investment portfolio. To do so, we use four broad concepts to frame our thinking: integration, optimization, relationships and stewardship.

One Integrated Mission: How we invest the portfolio is integral to meeting the mission of the Trust. Therefore, we will:

- i. Consider our values in all investment decisions.*
- ii. Actively own and incorporate our values into asset management.*
- iii. Challenge conventional definitions of return and cost.*
- iv. Cultivate a broad view of risk which includes the consideration of unique factors such as the risk that our investments could contribute to the problems we try to address through grantmaking.*
- v. Consider wider stakeholder views; we do not seek to singularly optimize shareholder value.*

Meyer Memorial Trust



"We are still an aspiring learning organization"

Implementation

Learning:

Deepening analysis with focus on justice (what staff wanted) meant needing to support systems change and movement building. For the Building Community prog, there are application/reporting questions like "is community voice driving the work you're doing?" "How do you work toward equity and justice?" "How do you develop partnerships?"

We are still an aspiring learning org - want to do more structured learning and are hiring for a person. Have done things like once a quarter internal learning days. All staff have done training on how to be anti-racist.

Meyer Memorial Trust



“The board [recognized] an urgent opportunity to transform institutions, systems and narratives in Oregon, a state founded on stolen lands and explicit in its constitutional exclusion of Black people.”

Evolution and Advice

Key moments in their journey:

Story available in video here: <https://prezi.com/view/GlujSCnyycsX9qOy7LXn/>

In 2015, Meyer’s grantmaking evolved to focus on four priority areas in service to a vision of a flourishing and equitable Oregon. Funding was distributed primarily through an Annual Funding Opportunity organized across a range of issues-based portfolios: Building Community, Equitable Education, Healthy Environment and Housing Opportunities. In 2020, Meyer launched the single largest initiative in its history, [Justice Oregon for Black Lives](#). This five-year, \$25 million effort aims to deepen Meyer’s commitment to racial justice by making community-informed investments in the lives of Black Oregonians. Its goals are: Economic Justice, Investing in Education, Reimagining Public Safety, Shifting Black Narrative Through Arts + Culture, and Addressing Trauma + Healing. Meyer’s board of trustees approved the commitment in recognition of the urgent opportunity to transform institutions, systems and narratives in Oregon, a state founded on stolen lands and explicit in its constitutional exclusion of Black people. A long-term effort, the initiative is being co-created with Black communities working to advance racial justice and equity in Oregon.

In 2021, Meyer announced that it would be working with communities to design a new funding process and structure, with the intention of incorporating more trust-based principles, policies and practices. Guided by a new mission that is explicit in its commitment to justice, Meyer also unveiled a new strategic framework and approach: to use an anti-racist feminist lens to strengthen movements, change systems and support communities to build an Oregon that works for all.

"Don't be afraid when it's not all roses and sunshine. Expect to mess up and it will be ok!!"

Evolution and Advice

Key moments (continued):

s.h.i.f.t. (acronym) - there were staff who had been doing justice work for their whole careers, and in 2012, the CEO and board wanted to adopt a new mission about a flourishing OR but knew that training and defining would be required, and it was rough doing race equity training in 2012!! Changed the structure, changed some policies, created an internal equity team to help identify ongoing learning opps. The Prezi and the spectrum tool were created to help educate and explain what they were doing. Also used it internally to assess where they were/what they were ready for. Also used it with grantees to ensure they were committed to equity, even if they were right at the beginning. Created internal affinity groups for staff, including Latinx, white people, etc. Small budget for training and convenings. s.h.i.f.t. emerged, and the healing component emerged. Starting thinking more about belonging and the culture of the org. Then came to another revisit of the mission, in the early 2020s, when they made the jump from equity to justice. Not sure there's a willingness to do reparations, especially since they're squarely an in-perpetuity fdn.

Sunsetting or narrowing focus:

- Geographically - They experienced feedback suggesting that Meyer didn't care about rural areas anymore because they were equity focused. It was a false notion, but these partners got mad and disconnected somewhat from the staff. They're still funding in rural areas but are newly focused on systemic disparities. They did lose relationships but it was ok, and they built new relationships, like the Tribal communities in OR with whom they had not had relationships previously.
- Issue - They narrowed focused within environmental and affordable housing and closing the achievement gap (education). As a result of their REI journey, they decided to keep the overall categories but majorly narrowed within those categories using an REI lens and added one - Building Community - which became the systems change work and movement building work. Worked more in partnership with more justice focused partners.

"If you're going to ask someone and they tell you, then you better respond in some way. Either do it or tell them why you're not going to do it. This is community labor."

Mission and Strategy

Mission:

The Ruth Mott Foundation's mission is to advocate, stimulate, and support community vitality. Our commitment is to base the Foundation in its home community of Flint, Michigan.

Vision and Values

Vision: The Foundation envisions communities of hope and pride, whose neighborhood environments and urban core are safe, attractive and healthy, enriched by cultural diversity and an engaged citizenry. Values: Ruth Mott's values and conduct inspire us to: Be welcoming, inclusive, and egalitarian. Treat everyone with respect and dignity. Act with kindness and good humor. Promote civic hope and pride. Encourage personal responsibility. Practice prevention. Maintain the "long view."

Racial Equity:

Race equity has always been in the center of the work but not necessarily highlighted in the external comms and visual rep of the tools they use, like grantmaking, the Applewood property/gardens, and capacity building. Most recent planning process showed they were funding more black-led community leaders than previously, likely because the intense community engagement brought them more deeply in relationship with those leaders. They are doing a lot of internal racial equity work. Like CE is part of everyone's role, it's everyone's job to advance RE mission of the org.

Strategic Plan Link

https://www.ruthmottfoundation.org/wp-content/uploads/2021/02/Strategic-Plan-for-Website_Extended.pdf

"We asked ... if you had \$6M, where would you allocate the money?"

Implementation

Community engagement:

They have a process called "shoe leather philanthropy." Very involved community engagement process to identify grantmaking focus areas. Got feedback from over 500 people on a range of potential grantmaking areas - went to different quadrants of N. Flint, different community venues, different times, etc. B/c youth was coming up - did a separate process of going to young people. As a result of those forums, 4 top issues became the foundation's strategic priorities and a lot of detail on where specifically to focus under those issues was gathered by asking "if you had \$6M, where would you allocate the money?"

Close to but not participatory grantmaking - grant budgets were developed based on how residents assigned value to the issue areas. Then did a check in w/ community 2.5 yrs in, engaged with new orgs they hadn't yet funded and had grantees report to the community. Had identified forming a Community Adv Committee but hasn't happened. It's everyone's job to do community engagement, like horticulture staff of the Applewood Estate. They use a Community Engagement framework with examples of how every role can do comm engagement and do learning and measurement based on that.

Collaboration:

They participated in a collective response to the inequities uncovered by COVID (2020) and started funding new and grassroots orgs identified as critical but under-resourced. They convene some of their business-proximate grantees, like workforce providers, and raise public awareness about black-owned businesses. The foundation uses connections with government to influence its focus - for example, they helped get younger, grassroots leaders on committees and commissions created by city govt. Also, really trying to promote and support civic engagement much more than they have in past. Resident engagement: funding around redistricting and getting citizens involved in that process ... voting!!

“We did an impact investing learning exploration in 2021 and over a year, we learned much more about how to identify its purpose and how to overlay a race equity lens.”

Implementation

Systems Change:

Their work is significantly focused on the lack of access to key systems/wealth-building opportunities that people of color don't have, like PPP loan tools at banks.

Impact Investing:

Principles:

- 1) North Flint-focused,
- 2) Resident-identified priorities,
- 3) Indicators align with anticipated outcomes for grants and for the community as a whole.

Learning officers worked with grantees to really tweak what's most useful for the community, not for the foundation. At end of 2021, carved out \$5M and did one loan with that. Just recently released an RFP to local CDFIs to make \$2M available through them. Learned that the CDFIs are best positioned to support small businesses with smaller loans.

“Our Learning Officer role has been so important.”

Implementation

Learning:

Two major efforts: Launched in 2017, the [North Flint Community Dashboard](#) is an online tool that aggregates publicly available data for north Flint, shows progress or lack thereof by various indicators, and generates visual reports as well as comparisons to the city as a whole, Genesee County, and state of Michigan. The Dashboard shows data by geography and by race, shows changes over time, and provides contextual information. There are several objectives for the dashboard:

- Provide an overview of community-level trend data for north Flint.
- Increase the ability to evaluate the community’s collective effectiveness.
- Provide the community with a mechanism for data-driven decision making in north Flint.

They also do major presentations to the community on where grant dollars going, based on review of 3 questions: how are we doing, are these still the right areas of need, what other things should we continue/should the relative valuation change? Open to all N. Flint residents - different times of day, different places, always had food and other amenities. Several hundred folks.

Learning officer role has been so important - they created a framework initially for each of the focus areas but then ran several convenings with the grantee leaders to develop appropriate metrics for them.

“Before the process, only the program team had relationships in the community so the full understanding of the community wasn't inhabiting the entire staff.”

Evolution and Advice

Key moments in their journey:

The foundation formed in 1999, after the death of donor (wife of Charles Stewart Mott), and grantmaking began in 2001. At that time, there wasn't a unified strategic plan though always focused on Flint, MI, and grants were very broad, around interests of Ruth Mott. In 2015, the board committed to investing solely in North Flint. End of 2015 was roll out of plan, 2016-2020 was time frame. Was very much a board-driven plan ... staff did position papers and provided opinions but were not part of work directly with the consultants.

Then board agreed to getting out into community and talking about focus and asking for input on issue focus. Have always been the grassroots funder in the community but in strategic planning process, used community feedback and data (master planning process that had used 1000s of inputs) from recent past. Before the process, only the program team had relationships in the community so the full understanding of the community wasn't inhabiting the entire staff. Race equity has always been in the center of the work but not necessarily highlighted in the external communications and visual representation of the tools they use, like grantmaking, Applewood, cap building. Going forward, they want to visually and unapologetically center RE in the work.

“Since then, through our communications functions and other outlets, like Black-owned newspapers, there are many more positive stories of investment coming out of North Flint.”

Evolution and Advice

Sunsetting or narrowing focus:

Geographic: The board decided to focus only on North Flint, which is majority Black and had the least investment. Didn't say that they were focusing there for reasons of RE, but feel like it was "implied." They didn't get a lot of pushback from the community, but got a lot of happiness from the residents of those neighborhoods. Since then, through their communications functions and other outlets, like Black-owned newspapers, there are many more positive stories of investment coming out of North Flint.

Issue: went from breadth to depth in the 4 grantmaking areas. Continually communicating all of the stages of the process with grantees, community, partners. Specifically with grantees, making sure they were all communicating the same things - unified talking points, everyone externally saying consistent messaging. Where exiting grant areas and specific grants was happening, there were LOTS of conversations about what it might look like. They did it pretty quickly. Also engaged with other local funders (good infrastructure for convening in MI), who had already come to their forums to hear what was happening. Probably taught them a lot, was standard setting for how other funders could show up.

Advice for Oishei:

“I cannot stress enough how important strategic communications is for the change management of centering community and equity.”