

NCRP STAFF

Ben Barge

Senior Associate for Learning and Engagement

Aaron Dorfman

President and CEO

Caitlin Duffy

Senior Associate for Learning and Engagement

Kevin Faria

Senior Director of Foundation Engagement

Timi Gerson

Vice President and Chief Content Officer

Peter Haldis

Senior Associate for Communications

Jeanné Isler

Vice President and Chief Engagement Officer

Garnetta Lewis

Executive Assistant to the President and CEO

Aracely Melendez

IT Manager

Kristina ("Yna") C. Moore

Senior Director of Communications

Stephanie Peng

Research and Policy Associate

Dan Petegorsky

Senior Fellow and Director of Public Policy

Lisa Raghelli

Senior Director of Assessment and Special Projects

Janay Richmond

Manager of Nonprofit Membership and Engagement

Beverley Samuda-Wylder

Senior Director of HR and Administration

Ryan Schlegel

Director of Research



Responsive Philanthropy is the quarterly journal of the National Committee for Responsive Philanthropy.

2018, Issue No. 3
ISBN: 1065-0008

© 2018 All rights reserved.
National Committee for
Responsive Philanthropy
1900 L Street NW, Suite 825
Washington, DC 20036
Phone 202.387.9177
Fax 202.332.5084
E-mail: info@ncrp.org

In pursuit of equity: A family foundation's story

By Cynthia Addams and Colin Jones

The work associated with diversity, equity and inclusion in philanthropy is often called a journey, but "pursuit" sounds like a better description after several years on this path. While a journey can be uncertain and meandering, the idea of a pursuit calls to mind intentionality.

At The Collins Foundation, we have been on such a pursuit for several years. During this time, we have continually asked ourselves: How and where do values of diversity, equity and inclusion show up in a general-purpose family foundation like ours? Engaging in a broader range of perspectives on our board of trustees is one answer to that.

COMMUNITY TRUSTEES AT THE COLLINS FOUNDATION

In 2010, we contributed to – and learned a lot from – *Grantmaking to Communities of Color in Oregon*,¹ a report compiled by Grantmakers of Oregon & Southwest Washington and the Foundation Center, which indicated that fewer than 10 percent of grants in Oregon reached communities of color. That report prompted many conversations internally, among funders and with community-based organizations led by people of color. It also led to a published series of recommendations to Oregon foundations, titled *Philanthropy and Communities of Color in Oregon*,² by the Coalition of Communities of Color. All of this provided context for a 2013 retreat of The Collins Foundation board of trustees and nearly two years of equity learning, discernment and planning.

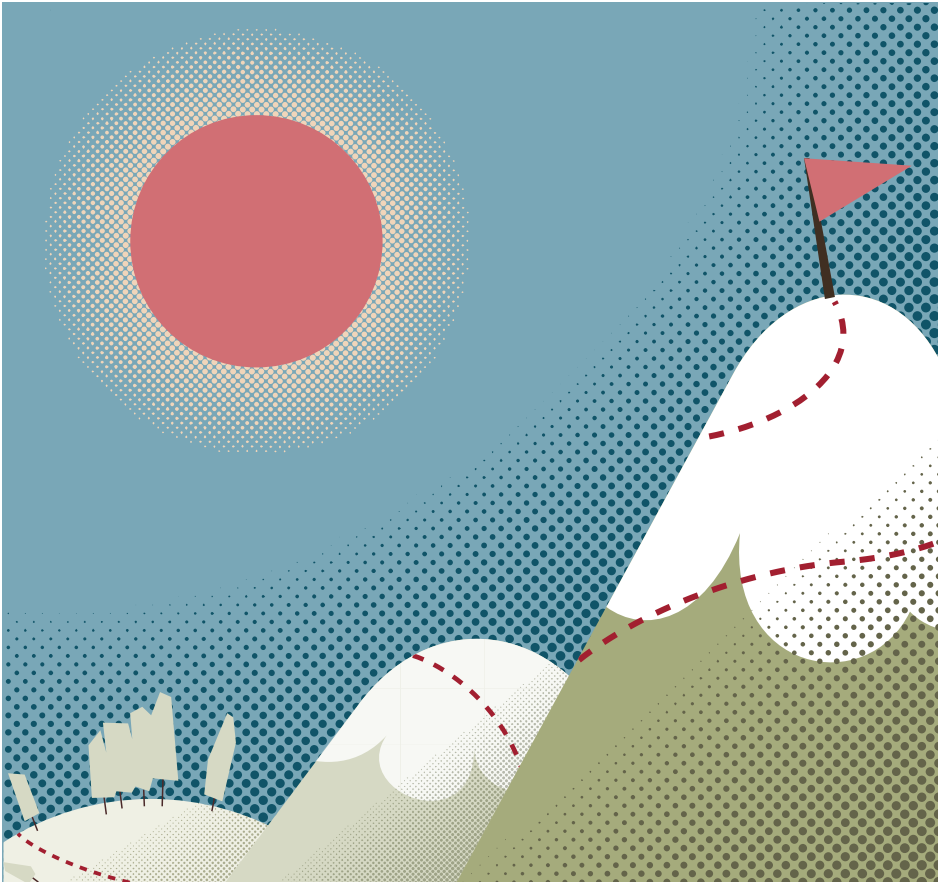
The Collins Foundation has benefitted tremendously from the participation of two community trustees over its 70-year history: one who joined in 1980 and recently retired and a second who joined in 2007 and will retire at the end of 2018. Among the key goals identified by the foundation's multi-year plan to advance diversity, equity and inclusion³ is to grow the number of community trustees on our board while also ensuring that the next generation of community trustees brings new perspectives afforded by racial and ethnic diversity. Recent revisions in our bylaws will increase the size of the board and formally establish the inclusion of community trustees as integral to the foundation's governance for the first time – three community trustees and four Collins family members will govern the foundation moving forward.

In fall 2016, we invited a diverse group of nonprofit leaders to join our trustees' retreat to share what qualities they would hope to see in the next generation of foundation trustees. We also wondered what questions or concerns they would have if they were asked to join the board and what they would need to feel welcome.

Their advice is helping to guide our selection of new trustees. It has also informed organizational changes and helped prepare us to welcome the first community trustees to join the board in more than a decade.

UNEARTHING OUR TRADITIONS

Our equity planning process started with a series of one-on-one interviews



conducted by a consultant with staff and trustees in summer 2014. Following these interviews, we sought to discern the deepest values of the foundation, i.e., those that have helped deliver on our mission of improving quality of life and well-being for Oregonians and those that stood in the way of progress toward equity, diversity and inclusion.

Love, compassion, collaboration and service came up often during our values discernment process. Equally potent, however, was the value we placed on tradition.

With a long history in Oregon, the foundation's grantmaking, along with many of its traditions and patterns, was established by its founding family in the 1940s – a Methodist family of wealth with a calling to support others in the spirit of compassion and service. Not surprisingly, the foundation's grants carried that stamp of service, and, over the decades, a healthy pool of grantees emerged, along with a pattern of giving

that was firmly established. As the next generation of trustees joined the board, supported and nurtured by the prior generation, they, too, had the opportunity to steward the foundation's assets and grantmaking in a growing line of succession.

As we reflected on the role that tradition has played within the foundation, we had to confront hard questions: How does a grantmaking tradition that favors long-term relationships forged in earlier decades coexist with a goal to expand and increase funding to communities of color in a state that has grown increasingly more diverse? How, too, does a foundation reckon with the disparities experienced by people of color across Oregon, including within the nonprofit sector, without accepting that we have contributed to those disparities in some ways? How would new community trustees – the first from outside the foundation in decades – react to or be affected by our longstanding traditions?

Unearthing the many expressions of tradition at The Collins Foundation has been liberating and transformative.

For example, the foundation recognizes religion as one of its funding areas, in part because of its Methodist heritage. We are also increasingly aware of the disparities that exist in LGBTQ communities, and we are committed to doing our part to address them. Although the regional body of the Methodist Church in the west openly practices inclusion, it is governed by an overarching Methodist doctrine that intentionally excludes LGBTQ individuals from full participation in the church.

Living our values meant shifting our funding toward advocacy and organizing for full inclusion – that was a big step for The Collins Foundation. Fortunately, we found a willing partner in the Oregon-Idaho Conference of the Church,⁴ which has become a vocal advocate for change.

FOSTERING A CULTURE OF LEARNING

The discernment process that led to the foundation's multi-year equity plan helped us recognize that to serve the Oregon of today and the Oregon of the future, we must invest in our own learning and the learning of others, and explore new ways of grantmaking.

This commitment to learning and exploration has shown up in big and small ways. In 2016, we invested in an equity learning cohort, bringing together five youth-serving organizations to deepen their internal commitments to equity and strengthen practices for serving youth of color. The following year, we renewed our investment in the cohort and started a new tradition within the foundation – a staff and trustee equity conversation to open each trustee meeting, which is both deepening our shared knowledge and building stronger relationships among us.

In tandem with this shared learning, we have sought out and seized

on opportunities to try new approaches to grantmaking. Our board of trustees enthusiastically agreed to launch a rapid response fund in early 2017 for immigrants and refugees impacted by federal policy changes. Embracing such work required a streamlined approach to decision-making, which is different from our 70-year pattern. Together, with three other funders in Oregon, we were able to establish the Oregon Immigrant & Refugee Funders Collaborative⁵ to align our funding and reduce barriers for community-based organizations.

Also pushing our boundaries is the launch of a new initiative, several components of which were first imagined during our equity planning three years ago. Led by our new community engagement fellow, this initiative will provide multi-year operating grants and technical assistance to small and emerging organizations in communities of color, including those rooted in immigrant and refugee communities, disability and deaf communities and LGBTQ communities in Oregon. The work will be guided by a community advisory committee – the first ever for The Collins Foundation – that will help steer the process, select the program participants and make funding recommendations to our board of trustees.

These steps toward learning, growth and experimentation have value in their own right: They are deepening our relationships with Oregon's diverse communities and making our grants more responsive to ever-evolving needs on the ground. At the same time, they are building habits of openness and flexibility within the foundation that will serve us well when we welcome the next generation of community trustees.

NEW WAYS OF WORKING

Our responsive grantmaking and our processes are evolving, too, with new opportunities for adaptation consistently showing up.

Because we anticipate our new community trustees will also be working full-time and juggling multiple responsibilities, we recently disrupted yet another tradition – the expectation that trustees will read every grant proposal in its entirety, of which there are nearly 40 every two months. By authorizing staff to make funding recommendations on smaller applications, the trustees will shift to reading only the summary write-ups on smaller requests. And, with less time dedicated to reviewing individual applications in board meetings, there will be more opportunity for shared learning, community engagement and strategic discussions.

This change grew out of an increasingly collaborative staff-review process, which itself began evolving as we welcomed new staff members with diverse perspectives and experiences.

THE WAY FORWARD

Today, The Collins Foundation is an evolving organization with a long history behind it, a blossoming of fresh ideas and a willingness to grow and

change. But none of this would have been possible without hours dedicated to discerning our values, questioning our traditions, looking for growth opportunities and learning how to embrace difference.

One piece of advice, in particular, lingers from that 2016 retreat with non-profit leaders: The foundation should think of welcoming new board members not as a final destination, but as part of our continued growth and evolution.

While the pursuit of equity at The Collins Foundation is well underway, there is no doubt that the next generation of trustees will be influential in further defining what this pursuit looks like for a general-purpose family foundation committed to responsive and equitable grantmaking in the 21st century. ■

Cynthia Addams is CEO and Colin Jones is grants manager at The Collins Foundation, a 70-year-old family foundation in Portland, Oregon.

Notes

1. View the report at http://gosw.org/wp-content/uploads/2016/10/ORDiversity1Q_single-pages_web.pdf.
2. Download the report at <http://www.coalitioncommunitiescolor.org/research-and-publications/cccpilanthropyinoregon>.
3. View The Collins Foundation's diversity, equity and inclusion plan at <http://www.collinsfoundation.org/diversity-equity-inclusion-plan>.
4. Learn more at <https://www.umoj.org/newsdetail/new-lgbtq-advocacy-coordinator-ready-for-spirits-to-be-stirred-11121538>.
5. Learn more about the Immigrant & Refugee Funders Collaborative and its submission guidelines at <http://www.collinsfoundation.org/submission-guidelines/immigrant-refugee-funders-collaborative>.

The foundation should think of welcoming new board members not as a final destination, but as part of our continued growth and evolution.