



JOHN R. OISHEI FOUNDATION

**RACIAL EQUITY AUDIT REPORT**

**2018 – 2020**

**Approved December, 2018**

# Introduction

Buffalo is experiencing a time of unprecedented resurgence. Cranes are in the air, the waterfront is being revitalized and young adults are returning home. Even so, the literal and figurative Main Street divide remains, perpetuating long standing racial inequities established by decades-old policies and practices. For far too long, sections of our community have been racked by disinvestment, by unequal access to quality education and health care, by inadequate, unsafe housing and by high poverty and unemployment rates. In order for the Buffalo Niagara region to truly thrive, it is imperative that the current resurgence touches all corners of our community and brings hope and prosperity to all.

As a catalyst for change with a mission of enhancing the economic vitality and quality of life for the Buffalo Niagara region, we need to fully understand and resolutely tackle the racial inequities that continue to exist in our region. Throughout all of our efforts, both within our own walls and outside in the community, we will work to ensure that our philanthropic decisions promote the elimination of racial equity gaps.

To this end, in January, 2017 the Board of Directors and staff began to reflect on the Foundation's mission as it relates to racial equity and the historic challenges that continue to plague our community. Under the guidance of an internal task force comprised of staff and trustees, dedicated time was set aside to watch videos, work with consultants, have in-depth conversations, and share stories all in an attempt to understand the negative impact of long-standing policies and practices that continue to negatively impact people of color and the whole community.

Since its founding, the Foundation has worked to help those most in need. Today, we are doubling down on this commitment, doing our work with greater intention and transparency by placing a racial equity lens on all of our efforts. We strongly believe that addressing racial equity will indeed enhance the region's economic vitality and more importantly, the quality of life for those who call Western New York home. Through this work we hope to engage more deeply with our community and to lead with both our hearts and our minds.

As we embark on this journey, we continue to speak with colleagues across the country to learn about their efforts related to Diversity, Equity and Inclusion (DEI). There is no “right way” or “singular path” forward. Rather, foundations are embracing DEI work through myriad entry points. Our first step in this life-long journey is to “walk the talk” and to first ensure that our organizational culture and practices demonstrate a clear commitment to racial equity.

We want to take a hard look at ourselves and challenge ourselves not only to talk about this difficult topic, but to take the next step of setting goals and being transparent in this work. This Audit Report is the result of an informal, internal, honest self-assessment that is meant to form a baseline while we strive to meet our own goals to promote racial equity. Every three years, the Foundation will report to the community on the goals we have set to determine our progress in this area. Not only will this work build our culture of continuous learning and inform all that we do and all that we are, but by sharing our efforts with colleagues, we hope to deepen our collective commitment to racial equity and through shared resolve, work with intention to eliminate racial equity gaps in our community.

What follows is essentially a starting point, articulating our current practices and setting forth a series of goals that will guide our ongoing efforts.

# Build our Culture

With the creation of the Greater Buffalo Racial Equity Roundtable, our community began to talk in earnest about historic racial equity challenges that have long plagued our community. Trustees expressed a desire to begin working in this area and established a Task Force in the winter of 2017 comprised of four Trustees and one staff member.

## **Making a Commitment**

We recognize that this work is deeply personal and complex, requiring time and space. Eliminating racial inequities in our community is a daunting task, requiring constant commitment. Our commitment must become part of our DNA and be reflected in all that we are and all that we do. We will learn from mistakes and recognize that there are opportunities for improvement. We recognize that working to eradicate racial inequities demands systems change, requiring partnerships and a long-term lens that allows for incremental improvement.

## **Continuous Learning**

To support this work, continuous learning opportunities for trustees and staff will be incorporated into our yearly schedule and budget. Together, trustees and staff engaged in Racial Equity Impact Assessment Tool training, in Cultural Competency training and have shared their interest in this work through one-on-one interviews. We created a Logic Model as a road map forward and we created a commitment statement that articulates our dedication to this work.

Looking ahead, we will continue to participate in conferences and retreats, and when warranted will visit other places doing this work.

We will use our networks and reach out to national, regional and local partners as resources.

### **Reviewing Internal Practices and Policies**

We will review our own internal practices and policies related to staff hiring, board appointments, procurement, and investments. We will intentionally widen our outreach and strengthen our relationship with communities of color to create a pipeline of candidates to be considered when we have openings on our board/staff. We will identify and work with recruiters who are committed to bringing forward a diverse pool of candidates for open staff positions. Compensation and advancement opportunities will be made on an equitable basis for all employees.

The Governance Committee will establish specific criteria to ensure that a diverse pool of candidates with a range of perspectives and experiences, are brought forward for board consideration annually. The Investment Committee will explore and consider efforts to promote socially responsible investments and seek diversity among our investment managers.

We will actively seek out minority owned businesses with whom we can contract and will work to ensure that our practices and policies support their success.

## **Work in Partnership to Eliminate Racial Equity Gaps**

With an eye towards our next strategic plan, slated for 2021, we expect to work more closely with our community partners and

grantees over the next three years so that we learn together in order to better meet the needs of our community and address the racial equity gaps that persist today.

### **Moving Focus from Internal to External**

To date, our racial equity work has been internally focused. While this work will continue, beginning in 2019, the Foundation will engage more fully with the Greater Buffalo Racial Equity Roundtable in order to support their efforts and build our own capacity and impact.

We will intentionally focus our efforts to be more outward facing – working alongside our grantees to determine the best ways to strengthen their capacity as we work collectively to address racial equity gaps.

### **Building Non-Profit Capacity**

While we build our own capacity, we need to continue to build the capacity of our non-profit partners. We consider this to be critical work and look forward to continuing these efforts with an eye towards supporting and strengthening racial equity practices in our grantee's work. We will work in partnership with our grantees to identify best practices regarding the collection and use of data in order to tell stories and measure impact.

### **Listening**

We will engage in a comprehensive listening tour by convening focus groups to better understand racial equity challenges and the capacity needs of our grantees as they work to address those challenges. Focus groups will be facilitated by outside consultants without Foundation participation in order to gain honest feedback. We will circle back to participants to have a conversation about potential solutions and will share what we learn with the wider community.

We expect to bring new tools and programs to the community to support these efforts. We will research “Listen for Good,” a tool that builds the capacity of nonprofits to help them understand how to collect/interpret data in order to make “real time” course correction. We will investigate opportunities for local nonprofit engagement using this tool.

### **Developing Leaders**

Leadership development is a key component of capacity building. We will research best practices across the country and engage with national colleagues to explore the possibility of creating a robust leadership program that engages and supports people of color in order to build individual and community capacity.

We will reflect upon our grantmaking practices and identify opportunities that address long-standing inequities and support systems change in order to address racial equity gaps.

## **Be a Leader**

We are wading into uncharted waters and hope our efforts will encourage other Foundations to do the same. Taking a close look at our own practices and policies that influence our culture as well as our grantmaking, will help us to better serve our community.

We will share our efforts with colleagues and encourage them to engage in similar work in order to expand the field and have greater community impact.

### **Peer Learning**

In the next year, we will create an affinity group of foundation colleagues to create a platform for shared learning/collaboration to build the local philanthropic field's engagement in and commitment to racial equity.

### **Encouraging Collaboration and Collective Action**

In our role as convener, the Foundation often acts as a network builder bringing together different entities with the intent of expanding the reach and impact of various community efforts. Going forward, our efforts to encourage collaboration and support collective action will be infused by our interest in racial equity, encouraging those we work with to place a racial equity lens over their efforts. We will encourage Foundations and non profit organizations across all sectors to take the Racial Equity Impact Assessment Training and apply it to their work.

## **Track our Progress**

We will be transparent in our racial equity efforts. Recently, we crafted a Racial Equity Statement of Commitment that will be prominently placed on our website and used as an ongoing communications tool. The statement will serve as our pledge of commitment towards racial equity and will be our guiding light.

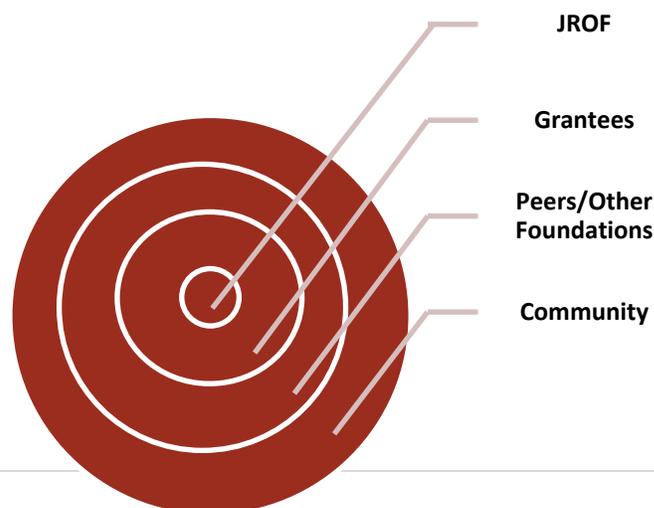
Each year we will re-commit to our racial equity work with intention and transparency. We will incorporate specific strategies and tactics into our annual operating plan to help us achieve our goals and track our progress. Every three years, we will share our learning and report out to the community.

# Conclusion

We recognize that addressing long-standing racial inequities in our community will require a deep and ongoing commitment with dedicated resources and strong resolve. First we will look at ourselves before working with our grantees, peers and the wider community to encourage and support others in this work. It will require looking back at our shared history and looking forward in partnership to write a new history. Most of all it is an opportunity to strengthen existing partnerships and to forge new relationships so that together, we are able to enhance the economic vitality and quality of life for the region we are honored to serve.

We believe that a greater, more intentional focus on racial equity is perfectly aligned with our overall mission and is the next step to eliminate racial equity gaps in our community and bring Buffalo's revitalization to all residents.

We plan to first examine our internal practices and policies and then move to work with our closest partners including grantees before we can expect to influence and encourage racial equity practices in the greater community.



## Goal 1

### **Embrace and infuse racial equity into the Foundation's culture**

- Engage our staff /trustees to establish a shared mission and goals regarding racial equity
- Dedicate Board and staff time and resources to improving racial equity practices
- Provide for continuous learning for Board, staff and partners through all available resources including local, regional and national organizations
- Review current practices related to staff hiring, board appointments, vendor choices, and investments so that they support racial equity
- Adopt practices and develop relationships that will create a pipeline of future board/staff candidates that bring expanded voice and experience to the foundation

## Goal 2

### **Work in partnership with our grantees and others to eliminate racial equity gaps**

- Create a more robust link to the Greater Buffalo Niagara Racial Equity Roundtable
- Collect and document diversity related information about grantees and those they serve; identify and implement tools to measure racial equity in our grantmaking
- Explore ways to build the capacity of our non-profit partners to address racial equity concerns
- Identify grantmaking opportunities to address racial equity

## Goal 3

### **Establish the Foundation as a leader and encourage others to adopt practices that will deepen our collective commitment to racial equity for the betterment of our community**

- Establish a peer learning community to communicate and share learning
- Ensure all work is collaborative and transparent

## Goal 4

### **Track our progress and share with the community**

- Establish baseline efforts and regularly audit/report on our progress
- Share progress publicly and transparently
- Learn from our experiences and share with others

# Addendum

1. Board/Staff Composition
2. Reflections from Trustees and Staff
3. Cultural Competency Training
4. Logic Model
5. Statement of Commitment
6. Work Plan

# Board and Staff Composition

In 1941, when John R. Oishei established the Julia R. and Estelle L. Foundation it functioned largely as a family concern with Oishei's sons, R. John and Julian, serving as the directors and officers. Until 1997, all of the Foundation's contributions were made on an anonymous basis. When the Foundation became a public entity in 1998, it was named after Mr. Oishei and the first governing board was established.

As depicted on page 14, early in our history our board composition was not reflective of the community we serve. Over the last few years, we've been more conscious of the need to expand our board representation. We don't want to lose the ground we've gained. In recognition that this is an ongoing challenge, we will do a better job of building connections and creating stronger relationships in the wider community in order to establish a robust pipeline of people of color able to bring different perspectives and lived experiences to our board table.

Staff turn-over is rare. Regardless, a renewed effort will be made to more deeply engage with the community to identify potential candidates able to bring different perspectives and a deeper understanding of community needs to the Foundation when staff openings occur.

# Reflections from Trustees and Staff

In the spring/summer of 2018, staff had one-on-one interviews with each Trustee and each staff member to talk about the Foundation's racial equity work. The intent behind these conversations was to reflect upon the work done to date, to gauge interest and determine ways to move forward. Below are several general themes that emerged from these conversations.

## **Key themes from one-on-one interviews with staff and Trustees:**

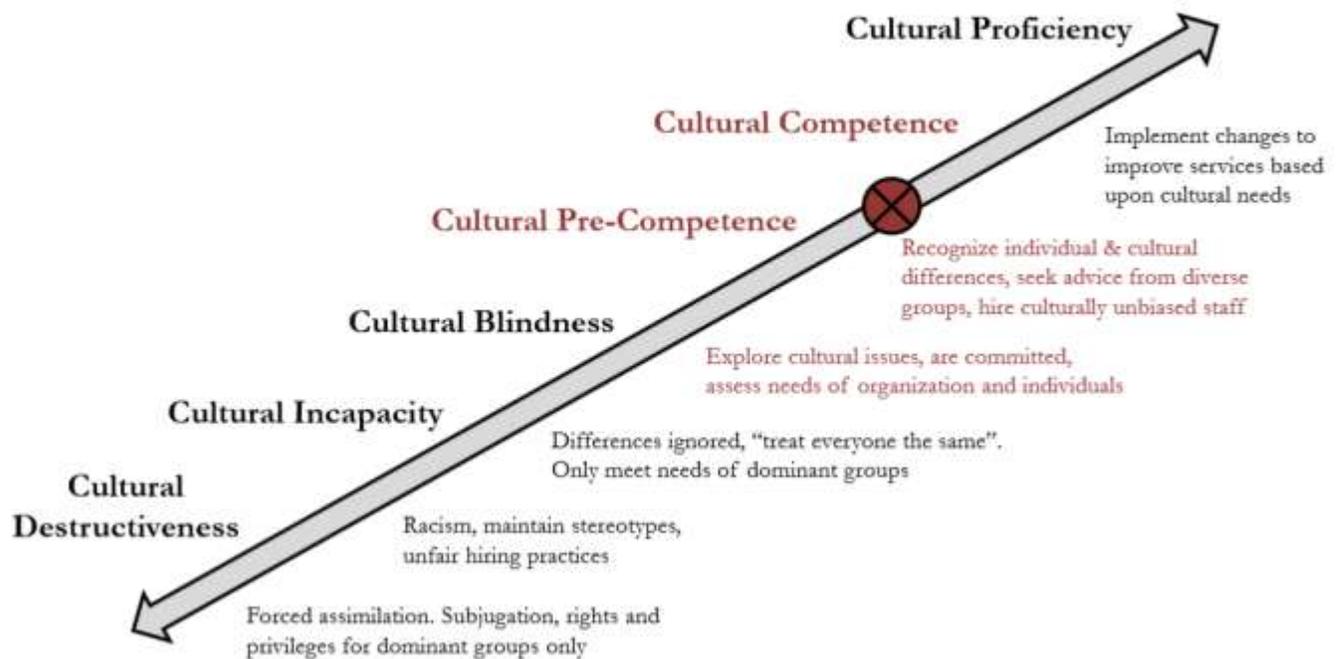
- **Work on racial equity is both a personal and professional journey**
  - Important to share personal stories, engage in conversation
  - Need to understand implicit bias and cultural sensitivity/competency
  
- **It is complex, long term work**
  - Time for reflection, learning is important
  - We need to find ways to push outside of our comfort zone
  
- **An atmosphere that supports continuous learning is key**
  - Infuse work into all that we do
  - Continue retreats, formal & informal training
  - Connect to others in the community; the more interactive, the better including other foundations, restorative justice groups, Latino/Hispanic, Native American, Pacific Islander and refugee/immigrant populations.

- **Work requires partnership**
  - Find ways to engage with higher ed, civic and business leaders and/or other organizations
  - Determine how we work effectively with grantees and “coach” their work and assess who benefits from foundation support.
  - Learn from others, use guest speakers, and engage deeper with Racial Equity Roundtable.
  - Be creative in partnerships to leverage assets to further learning and understanding.
  
- **Work requires intentionality with short and long term goals**
  - Apply our learning and hold ourselves accountable
  - Select and act on short term “doable” goals and be realistic about expectations for change
  - Set both short and long term goals including immediate action for staff and Board
  - Consider our work in our specific roles as funder, employer, community citizen, and economic booster.
  
- **We can and should continue our role as community leader**
  - Use our leadership role to encourage others
  - Document/communicate our work and share with others to build philanthropic field and community impact

# Cultural Competency Training

At the May 2018 Board meeting, Trustees and staff engaged in cultural competency training. Afterwards, Trustees and staff were asked to place the Foundation on a Cultural Competency Continuum. Eleven out of 19 responses were received with all responses falling between the Pre-Competence and Cultural Competence sections as noted below.

## CONTINUUM OF CULTURAL COMPETENCY



# Logic Model

**Problem Statement:** Through some of its own internal practices and policies as well as some of its philanthropic funding decisions, the JROF may be unknowingly and unintentionally contributing to the escalation or maintenance of RE gaps. JROF will intentionally and resolutely commit to closing RE gaps by updating its own policies and practices, by making funding decisions that address the multiple factors that produce racial inequities and by leading by example in both its internal and external practices.

**Goal:** To embed racial equity in all that the Foundation is and does to ensure opportunity for all.

Resources 	Activities 	Outcomes 	Impact 
<p>Articles, Videos</p> <p>REIA Training</p> <p>Retreats</p> <p>Consultant Advisement</p> <p>DEI Guidebooks</p> <p>Conference Materials/Learning</p> <p>Best Practices from other Foundations</p> <p>Racial Equity Roundtable</p> <p>Community Partners</p> <p>One-on-One Interviews</p>	<p>Discuss community RE issues and challenges at each JROF board meeting and through other learning activities</p> <p>Create opportunities for open dialogue related to racial equity and existing gaps with our grantee partners as an opportunity for shared learning</p> <p>Filter all JROF internal policies/practices, including staff and board composition, vendor engagement, and investment practices through the REIA tool in order to ensure an organizational culture that fully embraces/supports RE</p> <p>Filter all grantmaking policies and practices through the REIA tool and make necessary amendments to assure constancy in making philanthropic funding decisions that close RE gaps</p> <p>Lead the way by ensuring our work is transparent, clearly communicated and shared with the wider community</p> <p>Convene capacity building initiatives to promote collective/systemic responses to closing RE gaps</p> <p>Create, monitor and evaluate strategies across all sectors of our work that advances RE</p>	<p>Increased opportunities to understand our national/local and personal history and the impact of structural racism</p> <p>Increased opportunities to evaluate our own policies and practices to ensure they close RE gaps</p> <p>Increased opportunities to fund projects/initiatives/programs that close RE gaps</p> <p>Increased opportunities to collaborate with other funders to close RE gaps</p> <p>Increased opportunities for shared learning and problem solving</p> <p>Increased participation by communities/persons of color in closing RE gaps</p> <p>Increased capacity of institutions and individuals to close RE gaps</p>	<p>The Foundation's philanthropic decisions will promote the elimination of racial equity gaps</p>

# Statement of Commitment

## The John R. Oishei Foundation's Commitment to Racial Equity

Recognizing that we can only achieve our mission of enhancing economic vitality and quality of life for the Buffalo Niagara region if all people are afforded opportunities for success, The John R. Oishei Foundation is strongly committed to better understanding and addressing issues of racial equity to create greater opportunities for all.

For too long, Buffalo has been a city divided by race and socioeconomic status. While the region has begun to enjoy revitalization and an improved economy after decades of decline, it continues to grapple with racial inequities that thwart our ability to become the dynamic city we strive to be.

### We believe that:

- Our region can better prosper if all residents have opportunities that allow them to achieve to the best of their ability by breaking down structural and attitudinal racial barriers.
- We must intentionally address issues of race as an economic and moral imperative. While we have historically worked with diverse groups throughout our community, we have not considered issues of race in an intentional way until now.
- As a convener and civic leader, we must first examine ourselves to determine how we can assess and intentionally address issues of conscious or unconscious bias and other practices that contribute to inequity in our work.

### We are committed to:

- A thorough review and assessment of our own practices and biases;
- Setting specific goals, evaluating our progress, and focusing on continuous and intentional improvement and learning in order to become a more racially conscious and equitable organization;
- Working with our partners to consider racial equity in their own practices and program delivery.

This work is a long-term, continuous journey that can be both personal and painful and we look forward to working with and learning from our partners along the way.

**Mission Statement:** The John R. Oishei Foundation enhances the economic vitality and quality of life for the Buffalo Niagara region through grantmaking, leadership and network building.

**Vision:** The John R. Oishei Foundation envisions the Buffalo Niagara region as a safe, healthy, thriving, culturally rich, and diverse community with equitable opportunities for all.