ACKNOWLEDGMENTS

We thank our Equity, Diversity and Inclusion Staff Committee for their dedication and contributions to advancing this important work since 2012. We also wish to thank the OCF Board of Directors Equity Committee for their leadership, support and guidance in advancing equity, diversity and inclusion at The Oregon Community Foundation.
EQUITY, DIVERSITY AND INCLUSION STATEMENT

Adopted by the OCF Board of Directors November 5, 2014

The Oregon Community Foundation’s mission is to improve the lives of all Oregonians through the power of philanthropy. OCF aspires to pursue its mission across all Oregon communities and populations. These communities are far more diverse and complex than they were throughout much of the state’s history and in coming times will reflect the diversity of the world.

OCF believes that persistent disparities based on such characteristics as race, gender, national origin, ethnicity, culture, disability, age, faith, gender identity and sexual orientation, together with barriers imposed by poverty, prevent OCF’s vision of a healthy, thriving, sustainable Oregon from being fully realized.

Individually and institutionally, Oregonians must be committed to move forward as one state. As we do, we will discover that we are stronger economically, richer culturally, healthier physically and mentally, and better prepared educationally to meet the challenges we face. Real change is seldom easy to achieve, and it requires strong, intentional leadership supported by the open participation and wisdom of many.

OCF commits itself to:

• appreciate the dignity and worth of all individuals;

• invite honest and dynamic discourse on the issues of equity, diversity and inclusion;

• develop within our own operations and policies a spirit and discipline that advances equity, diversity and inclusion;

• nurture an open and welcoming working environment;

• promote the dismantling of structural and cultural barriers to individual achievement;

• use our resources to make Oregon a place in which all people fully realize their aspirations; and

• advance public policies and practices consistent with these commitments.

As we travel this road, we will need many others to advise us, to partner with us, to reinforce our work and to inspire us. We ask for the support and the participation of all Oregonians as we work to keep these commitments so central to our mission.
OCF’S COMMITMENT TO
EQUITY, DIVERSITY AND INCLUSION (EDI)

How does OCF define equity, diversity and inclusion?

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

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

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

What are we doing about it?

OCF has prioritized equity, diversity and inclusion in all aspects of the Foundation. As part of this commitment, we have an active Equity, Diversity and Inclusion (EDI) staff committee that champions EDI at OCF and ensures tangible action that advances our EDI priority. We have a Board of Directors Equity Committee that reinforces our organization’s direction and progress in this work.

We have developed an EDI framework to guide our efforts.
THE OREGON COMMUNITY FOUNDATION

We commit ourselves and our resources to the advancement of equity, diversity and inclusion and toward making Oregon a place where all people can fully realize their aspirations

Adopted by the OCF Board of Directors
## EQUITY, DIVERSITY AND INCLUSION (EDI) WORK PLAN

<table>
<thead>
<tr>
<th>DIVERSITY OF PEOPLE AND PERSPECTIVES</th>
<th>IMPROVE CULTURAL AGILITY</th>
<th>EFFECTIVE COMMUNITY ENGAGEMENT</th>
<th>IMPACT ON EQUITY AND DISPARITIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improve the cultural competency of OCF</td>
<td>Increase the cultural competency of OCF</td>
<td>Prioritize outreach and partnerships to improve our engagement and impact</td>
<td>Take action to impact equity in the work we do and in the communities we serve</td>
</tr>
<tr>
<td><strong>★ Strengthen diversity of OCF family</strong></td>
<td><strong>★ Educate and train OCF family</strong></td>
<td><strong>★ Engage with diverse communities</strong></td>
<td><strong>★ Increase funding to diverse constituents</strong></td>
</tr>
<tr>
<td>- Set goals and strategies for increasing diversity in staff, management and board member categories</td>
<td>- Provide regular and meaningful cultural competency education to staff, management, board members, leadership councils, committees and volunteers</td>
<td>- Increase meaningful participation of OCF staff in culturally specific organizations and those addressing EDI issues</td>
<td>- Explore grantmaking that builds the capacity for nonprofits to advance EDI</td>
</tr>
<tr>
<td>- Recruit and retain diverse staff, management, board members, committees, leadership council and volunteers to more closely reflect communities we serve and to increase diversity in perspectives</td>
<td>- Engage and educate OCF donors to share our commitment to EDI and to understand the issues facing our communities</td>
<td>- Partner with diverse communities and invite them to share their perspectives with OCF</td>
<td>- Create equitable processes, policies and practices that minimize barriers to resources</td>
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<tr>
<td>- Track demographics of OCF family</td>
<td>- Increase the knowledge of OCF staff about current programs that support EDI and the business case for our strategies</td>
<td>- Replicate successes we have with existing outreach efforts</td>
<td>- Apply an equity lens to all grant application and review processes</td>
</tr>
<tr>
<td><strong>★ Foster an inclusive culture</strong></td>
<td><strong>★ Enhance communication to increase awareness</strong></td>
<td><strong>★ Convene leaders and partners</strong></td>
<td><strong>★ Diversify donor base</strong></td>
</tr>
<tr>
<td>- Foster an inclusive culture that allows staff to actively participate and in which we welcome a broad spectrum of ideas and perspectives</td>
<td>- Implement communication plan to increase the awareness of OCF family about EDI efforts</td>
<td>- Establish intentional partnerships with other grantmaking entities and organizations that prioritize equity, diversity and inclusion in order to build collective capacity</td>
<td>- Increase staff understanding of giving behaviors in diverse and emerging populations in Oregon in order to create responsive, effective and relevant donor engagement</td>
</tr>
<tr>
<td>- Ensure policies and programs are accessible and equitable</td>
<td>- Demonstrate EDI commitment in our external communications</td>
<td>- Use our convening power to bring statewide leaders together to better serve underserved and underrepresented constituencies</td>
<td>- Reach out to professional advisors who represent diverse communities</td>
</tr>
<tr>
<td>- Ensure internal communication message is sensitive, accessible and respectful</td>
<td>- Ensure all material is inclusive and sensitive to various audiences and reflects the diversity of our communities</td>
<td>- Use data to inform grantmaking, scholarships and outreach for underrepresented and underserved populations</td>
<td>- Set targets for building diverse donor relationships</td>
</tr>
<tr>
<td>- Measure inclusion climate of the organization to ensure we have a welcoming environment</td>
<td>- Communicate our impact and challenges in advancing our EDI commitment across the state</td>
<td>- Track demographics of donors, professional advisors and investment managers</td>
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</tr>
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</table>

### STRATEGIC PLAN OBJECTIVES

- Improve life in Oregon
- Promote effective philanthropy
- Engage and serve all
- Strengthen OCF’s capacity to meet its mission
- Improve data collection
- Leverage research capability

- Commit to supplier diversity
  - Increase inclusion of diverse enterprises through supplier and vendor programs and partnerships
  - Convey our commitment to EDI in our vendor and purchasing relationships
- Diversify donor base
  - Increase staff understanding of giving behaviors in diverse and emerging populations in Oregon in order to create responsive, effective and relevant donor engagement
  - Reach out to professional advisors who represent diverse communities
  - Set targets for building diverse donor relationships
  - Track demographics of donors, professional advisors and investment managers
- Strengthen regional strategies
  - Increase opportunities for leadership council members to be involved with organizations and efforts to advance EDI
  - Participate in outreach events in communities that will allow staff to connect with underserved and underrepresented constituencies and broaden our knowledge
- Strengthen OCF’s capacity to meet its mission
  - Increase the cultural competency of OCF
  - Prioritize outreach and partnerships to improve our engagement and impact
  - Take action to impact equity in the work we do and in the communities we serve
Equity, Diversity and Inclusion Key Milestones

Launched new arts and education initiatives designed specifically to reach communities of color and/or low-income and rural communities.

All-staff retreat to explore OCF’s current impact on EDI and to identify areas for improvement.

Educational EDI related workshops offered to staff.

All-staff workshop about unconscious bias.

Delivered a session on OCF’s equity, diversity and inclusion focus at the Statewide Leaders Gathering.

The OCF Board of Directors participated in two EDI trainings.

Delivered a session on OCF’s equity, diversity and inclusion framework.

Consistently collect data on our discretionary funding to inform our grantmaking.

Board and staff participated in EDI learning opportunities.

Joined colleagues from area foundations to establish a fellowship cohort of professionals of color to help diversify pipeline of talent in philanthropy.

Formalized recruitment practices to create a diverse pipeline of candidates.

Established an EDI Staff Committee for OCF and a Board of Directors Equity Committee.

Prioritized equity in Community Grant Program guidelines.

Community Grant Program application revised to reflect EDI commitment.

The OCF Board adopted an Equity, Diversity and Inclusion statement.

Joined colleagues from area foundations to establish a fellowship cohort of professionals of color to help diversify pipeline of talent in philanthropy.

The OCF Board of Directors participated in two EDI trainings.

Delivered a session on OCF’s equity, diversity and inclusion framework.

OCF’s board created an LPP Statewide Director position – which brought an important voice and insight to working with Latino communities around the state.

OCF President and CEO joined D5’s cohort of foundation leaders to advance equity in philanthropy.

OCF conducted an equity assessment of the Foundation, which involved an examination of OCF’s programs, culture and operations. The findings and recommendations of that assessment were incorporated into OCF’s Strategic Plan and adopted by the Board of Directors.

OCF developed a formal EDI framework to guide our work and refined our working definitions for equity, diversity and inclusion.

OCF sponsored “Say Hey” 2012.

Educational EDI related workshops offered to staff.

All-staff retreat incorporated EDI education.

Updated OCF Style Guide with more inclusive language.

Delivered equity and opportunity gap session to statewide OCF family.

OCF sponsored “Say Hey” 2013.

Community Grant Program instituted an EDI focus in proposal reviews.

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OCF sponsored “Say Hey” 2015.

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OCF sponsored “Say Hey” 2016.

OCF sponsored “Say Hey” 2014.

The OCF Board adopted an Equity, Diversity and Inclusion statement.

Once staff participated in a series of trainings in the following areas:• Systems thinking• Rank, power and privilege• Becoming an ally• Navigating conflict

Consistently collect data on our discretionary funding to inform our grantmaking.

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