



Orange County Opportunity Initiative Learning and Evaluation Executive Summary

October 2020

Background

Orange County is the 4th largest county in the United States with an immigrant population. While the immigrant and refugee community has firmly established itself into the social and economic fabric of Orange County, over half are either undocumented or have not been able to become fully naturalized due to lack of coordinated legal and social services across the region.

In response to this need, 23 funding partners launched the Orange County Opportunity Initiative (OCOI) in 2015. The OCOI's mission is to strengthen the immigrant and refugee serving organizations by enhancing direct services and system change capacity to achieve collective impact. OCOI has been able to fund over \$2 million to 23 grantee partner organizations for legal services, outreach and education, and advocacy and community organizing. OCOI has also evolved from a traditional funder-driven initiative to a collective impact approach that incorporates a shared governance model and backbone support through the fiscal sponsorship of Charitable Ventures. Currently, the initiative is going through a new strategic planning process with funder and grantee partners working together to refine strategies focused on systems change advocacy, infrastructure development, narrative change, and cross-cultural and multi-racial work.

Methods: In 2019, OCOI partnered with Engage R+D, a learning and evaluation firm, to take a **retrospective look at how OCOI and their grantees collectively supported immigrant groups and helped the county embrace the promise and potential of its immigrant communities.** Case study efforts focused on the following areas of interest:



1. **Strategies, Challenges, and Capacity (Grantee Organizations):** Understand how grantees are helping to reduce barriers to immigrant services in Orange County and which strategies appear to be most effective. Highlight challenges for nonprofits/service providers and how organizational capacity has been enhanced.



2. **Collaborative Partnership, and Field Influence (Initiative level):** Learn how the OCOI is partnering with others to create a stronger future for immigrants. Understand how the initiative is building regional capacity to respond to immigration and refugee issues and contribution to a regional narrative. Identify best practices for coordinating, leveraging, and aligning efforts within the collaborative.



3. **Organizational Learning (Foundation):** Learn how OCOI is shifting internal processes and practices. Identify OCOI accomplishments, challenges, and implications for future strategy development and grantmaking.

The evaluation team developed a deeper qualitative understanding about these learning areas and initiative's impact on individuals, grantees, and the broader Orange County community through the following evaluation activities:



Interviews with funders, partners, and OCOI staff



Meeting observations and collaboration with consultants



Existing data, protocols, and past grantee reports



Virtual listening sessions with grantees

OCOI's Formation

Prior to the formation of the OCOI, funders spent time learning about immigration issues and needs within Orange County. In 2012, the Orange County Community Foundation (OCCF) began convening funders to discuss immigrant issues. By 2015, OCCF was invited by GCIR to become a member of the *Delivering on the Dream Collaborative* and was awarded a grant from CCF to support citizenship efforts in the county, and a grant from OSF to conduct DACA related education and outreach. In **2015, OCOI was formed to address a need for funding directed to immigration services** in the Orange County region.

Review OCOI's journey to the right to track how the initiative has evolved over time. The follow section highlights cross-cutting takeaways from the retrospective evaluation of OCOI's efforts.

Cross-cutting Takeaways

1. Breaking down barriers and building relationships: The formation of OCOI supported breaking down barriers and building relationships among nonprofit organizations and service providers.



The **timely response to form OCOI in 2015** initiated a regional discussion about immigrant rights issues facing immigrant communities.



Orange County organizations started to come together and **identify other nonprofits and service providers within the initiative as sources of support**. OCOI's network of members assisted organizations within southern Orange County and **formed a stronger crisis response network among grantees and partners**.



In mature collective impact efforts, the role of the backbone team convenes partners, increases collective capacity to gather and use data and evaluation findings, analyzes data to identify strategy improvements, and support the creation of a policy and advocacy agenda. Throughout the life of the initiative, OCOI has **brought in partners and consultants to lay the foundation to play key collective impact roles**.

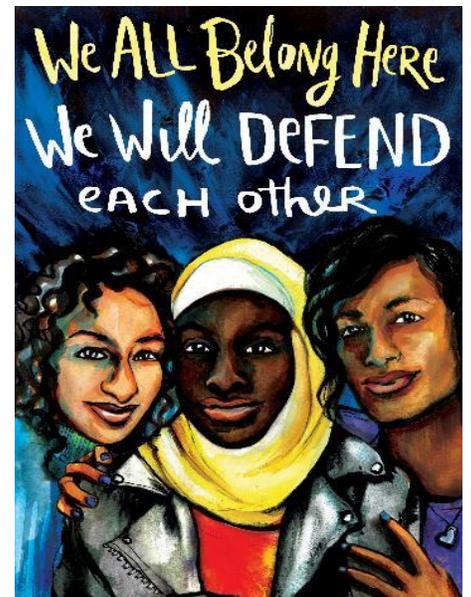
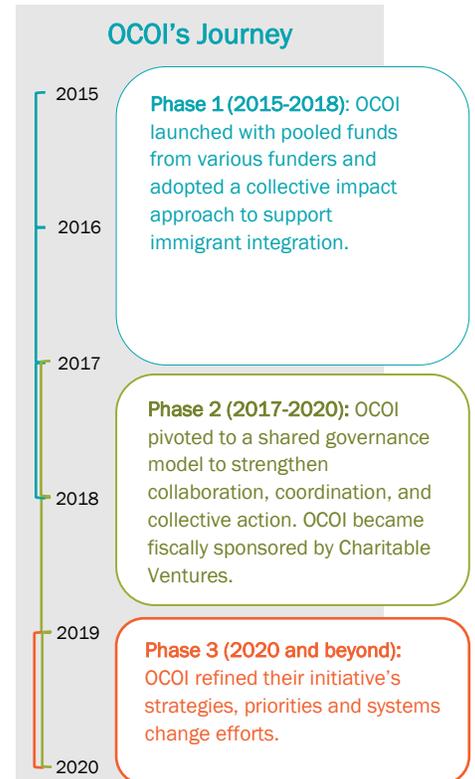
2. Building regional capacity: Over the last five years, OCOI grantee partner organizations have continued to strengthen their individual and collective regional capacities to improve service delivery to immigrants and refugees.



OCOI helped individual organizations to **build capacity, gain credibility and expand services** to immigrant communities through funding and networking with other organizations.



Collaborative efforts between OCOI grantee organizations helped address immigrant issues in a more **coordinated, effective, and efficient manner**.



Artwork by Micah Bazant for Amplifier.org as part of the *We All Belong Here Campaign*



OCOI helped **bridge relationships** across regions in OC as well supported cross-cultural and multi-racial efforts leading to stronger coalitions.



OCOI partners are beginning to **collaborate on local advocacy efforts** that can help shift narratives, policies and hold systems leaders accountable, but overall broader narrative change is still a work in progress.

3. Conclusions and considerations for systems change: Key issues grantee and funder partners discussed about what it would take for the OCOI to make regional systemic change:



Power, Trust, Relationships and Racial Equity: The OCOI was focused on building the infrastructure to strengthen coordination and regional capacity of service providers. As the initiative shifted from a traditional funder-driven approach, OCOI had to develop a new infrastructure that would support “shared governance” through the support of fiscal sponsor, Charitable Ventures. Both funding and grantee partners began to build trust by sharing and learning together. However, authentic relationships built on trust takes time and commitment. Successful collective impact initiatives do not underestimate the power of relationships and OCOI partners shared some concern that “there are power dynamics that stop the growth of OCOI”.

“There’s still a divide, there’s still a protection of certain territory. There’s also a divide still between the nonprofit organizations and the funders. Until you build that trust, we’re not going to get beyond the surface.”
- OCOI Partner



Service Delivery vs. Long-term Systems Change Strategies: Like other collective impact and systems change initiatives, OCOI was initiated in response to needs as well as opportunities for collective action in the region. A systems-change approach requires an on-going critical analysis of the complex relationships between policies and practices, structures, relationships, and norms that either facilitate or hinder a particular social issue. Additionally, systems change not only requires a mental shift but also different, long-term strategies. CBOs are used to surviving within a high-need environment with limited and scarce resources, which makes it difficult for grantee organizations to embrace a systems-change mindset and strategize toward broader goals. Funders need to help build the capacity for individual organizations to deliver services to scale by supporting branding, sustainability, and impact assessment. OCOI has built a strong network of partners who quickly adapt and strategize during critical moments (e.g., COVID response team, acting quickly to help detainees), which are important ingredients for systems change work.

“We realized that funding for more services isn’t getting to where we need to be as a community.”
- Funder



Collaborating to achieve shared goals: OCOI has built the foundation for new relationships, helping to build awareness and break down silos between organizations to better serve immigrants in Orange County. However, some partners wonder if the current level of networking is the type of collaboration that leads to collective action and systems change. Collaboration within a collective impact approach requires that partners come to a shared understanding of the problem (i.e., shared vision, shared agenda). Building a “culture of collective impact” and recognizing an intentional shift for organizations and funders is critical. For example, nonprofit culture is based on surviving within a competitive environment of limited resources, therefore collaborating toward common goals is often a challenge for collective impact initiatives. However, over the last five years, OCOI has nurtured new relationships and networks. Continuing to address power and trust as well as investing time and resources for collaboration will be instrumental as the initiative refines its systems change strategies.

“Collaboration only works if all the players or most of the players actually actively participate or recognize where things fit in, what the roles are and how each group plays.” - Grantee