INTRODUCTION

Orange County’s immigrant community is strong and has firmly established itself into the social and economic fabric of the region. Orange County is the 4th largest county in the United States with an immigrant population, yet 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 in order to achieve collective impact. Over the last five years, 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 from the Orange County Community Foundation (OCCF) and fiscal sponsorship from Charitable Ventures. Currently, the initiative is going through a new strategic planning process with funder and grantee partners are working together to refine their strategies focused on systems change advocacy, infrastructure development, narrative change, and cross-cultural and multi-racial work.
INTRODUCTION

Engage R+D was invited to implement a case study approach to retrospectively examine how OCOI and their grantees collectively supported immigrant groups and helped the county embrace the promise and potential of its immigrants. This “report deck” captures our key learnings with supportive data and examples of OCOI’s progress toward collective action.

This report deck is not intended to serve as a stand-alone presentation given the amount of information but can be adapted for sharing purposes. The deck is organized in the following sections:

• Evaluation purpose, learning questions and methods

• Context and history about Orange County’s immigration landscape and the evolution of the OCOI

• Part 1: Breaking down barriers and building relationships

• Part 2: Building Regional Capacity

• Part 3: Conclusions and Considerations for Systems Change
EVALUATION PURPOSE AND APPROACH

As part of the evaluation for the Orange County Opportunity Initiative (OCOI), the evaluation team used a case study approach 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. The three categories below highlight the learning areas of the evaluation.

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

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

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

See appendices for full set of evaluation questions.
LEARNING & EVALUATION METHODS

In order to answer the evaluation questions, we developed a deeper qualitative understanding about the initiative's impact on individuals, grantees, and the broader Orange County community. We engaged in the following evaluation activities:

- **Existing data, protocols, and past grantee reports** to identify gaps in existing information and opportunities in which interviews can dive deeper and surface stories that describe OCOI’s impact.

- **Meeting observations and collaboration with consultants** to leverage existing data from other consultants and past grantee reports in order to gain a deeper understanding of OCOI’s context.

- **Virtual listening sessions with grantees** to document the influence the OCOI has (capacity building, collaboration, and services/advocacy efforts in the region) on efforts to create a stronger future for immigrants in Orange County.

- **Interviews with funders, partners, and OCOI staff** to understand history of OCOI, the grantmaking model, and the longer-term strategy or vision for immigrant rights and integration for the region.

The findings presented in the following slides reflect these evaluation efforts.
Immigration and the Evolving Orange County Landscape
Orange County’s immigrant community has deep roots. Immigrants have lived in the county for an average of 22 years and represent 149 countries and territories, mainly from Asia and Latin America. Immigrants in Orange County contribute positively to the economy. A large majority of are employed (93.3%) and account for 38.4% of the county’s workforce*. While approximately half of the immigrant residents have citizenship, Orange County is considered to have the 2nd largest undocumented population in the nation. Approximately 20% of permanent residents are eligible for citizenship but have not yet been able to become naturalized, which would strengthen civic engagement such as voting.

Needs assessment studies have also shown that there are a limited number of organizations providing naturalization legal services to immigrants in Orange County.

Demographic Profile

56% Of OC residents are BIPOC

31.5%

(913,000) of OC residents are immigrants (compared to 14.1% nationally and 28.2% in CA)

OC is home to the 4th largest county in the US with a foreign-born population.

Citizenship

Undocumented, 24%

Citizen, 50%

Permanent Resident, 26%
Prior to the formation of OCOI, funders spent time learning about immigration issues and needs. 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.

**Building a Foundation (Convening and Learning)**

In 2017, OCCF also conducted a landscape analysis on the existing legal services and providers in the county.

From these early learning experiences, funders realized that several social issues intersect with immigration (e.g., health, education, poverty) and while there was a CBO base addressing these issues, there lacked a coordinated approach to support and expand legal services for immigrants.

There was also a huge gap across the nation and locally in philanthropic funding directed to immigration services.

**Key Insights from 2017 Landscape Analysis**

- In OC, only 15% (11 of 75) of providers stated providing legal services to immigrants, refugees or children of immigrants.
- 21% of providers were preparing to undergo possible immigration reform programs.
- **Areas needing investment**: legal services, strategic communications, collaborative capacity, voter engagement, and advocacy.
- >1% of grants from 1,000 of the largest US Foundations, between 2011-2015, were intended to support immigrants and refugees.
The Orange County Opportunity Initiative (OCOI) launched in December 2015 with 23 funding partners, using a collective impact approach to ensure that Orange County embraces and integrates its immigrant communities in order to build a stronger future for the region.

During the first 3 years, OCOI focused on strengthening the existing CBO base and funded up to 21 nonprofits to provide direct services related to:

- Deferred action
- Reducing barriers for immigrant communities
- Increasing residents eligible to normalize immigration status
- Increasing funds focused on capacity building (e.g., DOJ accreditation trainings, expanded immigration relief screening, coalition building)

**OCOI Mission, Vision and Goals**

**Mission:** To strengthen immigrant and refugee serving organizations by enhancing direct services and system change capacity in order to achieve collective impact.

**Vision:** Our vision is an immigrant and refugee community that is fully integrated into the socio-economic, cultural, political, and civic life of Orange County.

**Goals**

- Reduce barriers to immigrant services in Orange County
- Connect permanent legal residents to citizenship support
- Increase awareness of DACA-related services
- Enhance the capacity of existing service providers to increase the number of eligible immigrants applying for deferred action
In 2017-2018, OCOI partners engaged in a **strategic planning process** to discuss the investment priority areas, with a strong focus on collaborative capacity and strategic communications.

In 2018, OCOI became fiscally sponsored by Charitable Ventures. This **new shared governance model** included the coordination support of an Administrative Director to convene the Executive Committee (made up of funders and nonprofit partners) and other key partners (including 21 nonprofit organizations). The goal of this new approach was to strengthen the infrastructure for service organizations to become better coordinated, increase collaboration, and build greater capacity for collective action.

**Grantee organizations were funded in 3 areas:**
1. Legal Services
2. Outreach and Education
3. Advocacy and Community Organizing

In the summer of 2020, funding and nonprofit partners participated in a new strategic planning process. With a heightened sense of urgency given the **COVID-19 pandemic and racial justice movement**, the goal was to articulate OCOI’s “drivers of change” (i.e., systems change advocacy, infrastructure development, narrative change, and cross-cultural and multi-racial work) and how the existing initiative strategies (legal, outreach/education, and advocacy and organizing) are helping move towards systemic change.

To date, OCOI has granted $2.0 million to 23 nonprofit partners to provide outreach, education and legal services.
In 2019, the world was struck with the novel coronavirus COVID-19, which quickly became a pandemic that crippled the health and economic well-being of millions of people. In the US, COVID-19 has resulted in shutting down non-essential businesses and schools in order to slow the spread of the virus. However, what was quickly made apparent is that the “essential” workers included a large majority of BIPOC.

Coupled with limited access to testing and proper health care, the racial health disparities that have been existing for years, became more visible during the pandemic.

In Orange County, nonprofits had to quickly shift into emergency response mode to provide support for those most impacted, particularly in Santa Ana and Anaheim where a majority are Latinx residents.

At the same time, greater awareness of the long-history of police violence against Black people has garnered wide-spread racial justice activism nationally and locally in Orange County.

COVID-19 and Racial Justice Movement Impact of Grantees and Funders

- Shift to remote and virtual services
- Quickly coordinating emergency response funds to community; highlighting capacity issues
- Partners begin to center conversations about race, racism and racial equity as it relates to immigration issues in Orange County

“The racial equity issues is a huge issue that I think everybody is struggling to figure out how do we capture this moment when there's finally seems to be some momentum to address issues that have laid not dormant but have laid unacknowledged or dealt with. That's a broad effort that OCOI would have to take on to address that as well.” - OCOI Funder

Artwork from Amplifier.org by Nisha K. Sethi and Mer
OCOI’S RESPONSES TO A DYNAMIC ENVIRONMENT
EXAMPLES OF THREATS, RESPONSES, AND OPPORTUNITIES

THREATS

- OC deviates from inclusive CA policies
- OC was the only county in the state that still had a 287(g) agreement with ICE (2017)

Census 2020 citizenship
Administration adds citizenship question (Jan 2017)

OC Sheriff Sandra Hutchins aligns with Federal Government
Asks Trump Administration for help on legal directive to detain more immigrants and opposes SB 54 (2017)

National Elections (Nov 2016)

2015

OPPORTUNITIES

- OCOI Established with 23 funding partners (June 2015)

- Needs Assessment of Service Providers
  Identified Legal, Communications, Collaborative Capacity, Voter Engagement, and Advocacy as investment areas. (Aug 2017)

- Transitioned to Shared Governance Model
  Built coordinated infrastructure for immigrant-serving organizations that leverages service capacity (2018)

- Expanded grantmaking strategy
  Included immigration relief screening and coalition building and strategic planning (2017-2018)

- Hosted an Immigrant Integration Summit
  (Sept 2019)

- OC Community Resilience Fund
  Responded to COVID-19 (March 2020)

2016

2017

2018

2019

2020

INCREASING AWARENESS & REDUCING BARRIERS


- Supporting capacity building
  Among immigrant service providers, including DOJ-accreditation trainings (2016-2017)

- Needs Assessment of Service Providers
  Identified Legal, Communications, Collaborative Capacity, Voter Engagement, and Advocacy as investment areas. (Aug 2017)

- Transitioned to Shared Governance Model
  Built coordinated infrastructure for immigrant-serving organizations that leverages service capacity (2018)

- Expanded grantmaking strategy
  Included immigration relief screening and coalition building and strategic planning (2017-2018)

- Hosted an Immigrant Integration Summit
  (Sept 2019)

- OC Community Resilience Fund
  Responded to COVID-19 (March 2020)

PUBLIC CHARGE PENALTY
Administration seeks to change "public charge" policies (Sep 2018)

- OC cities disregard for VALUES Act
  Cities develop own commitments to file amicus briefs to side with the Trump administration (April 2018)

- OC violated sanctuary law
  ACLU filed suit to defend two men were detained by ICE (Jan 2020)

- OCOI’s RESPONSES TO A DYNAMIC ENVIRONMENT
EXAMPLES OF THREATS, RESPONSES, AND OPPORTUNITIES

- Repeal of DACA
  President declared “NO MORE” to a deal to help Dreamers.

- ICE continues to terrorize undocumented community during COVID-19 (April 2020)

- Hate crimes rise in OC Against Blacks, Latinos, Asians, Pacific Islanders. (May 2020)

- OCSheriff Sandra Hutchins aligns with Federal Government
  Asks Trump Administration for help on legal directive to detain more immigrants and opposes SB 54 (2017)

- National Elections (Nov 2016)

2015

2016

2017

2018

2019

2020

- Hosted an Immigrant Integration Summit
  (Sept 2019)

- OC Community Resilience Fund
  Responded to COVID-19 (March 2020)

- Needs Assessment of Service Providers
  Identified Legal, Communications, Collaborative Capacity, Voter Engagement, and Advocacy as investment areas. (Aug 2017)

- Transitioned to Shared Governance Model
  Built coordinated infrastructure for immigrant-serving organizations that leverages service capacity (2018)

- Expanded grantmaking strategy
  Included immigration relief screening and coalition building and strategic planning (2017-2018)

- Hosted an Immigrant Integration Summit
  (Sept 2019)

- OC Community Resilience Fund
  Responded to COVID-19 (March 2020)
“OCOI was really a collaborative space to stay informed, abreast with the trends of immigration issues and policies. First, specifically to DACA and then gradually evolved into just general issues in immigration and programs...it just ignited the initiative even more to work harder.”

- Grantee
The following are the three main cross-cutting themes and takeaways from the evaluation. Supporting findings for each takeaway are described throughout this report. The page numbers with further information associated with each finding are listed below.

1. The formation of OCOI supported breaking down barriers and building relationships among nonprofit organizations and service providers. (Slides 14-18)

2. OCOI grantee partner organizations have continued to strengthen their individual and collective regional capacities to improve service delivery to immigrants and refugees. (Slides 18-28)

3. Conclusions and Considerations for the Future: Laying the foundation for a collective action and systems change. (Slides 27-35)
PART 1: BREAKING DOWN BARRIERS AND BUILDING RELATIONSHIPS

“When we trust one another and are able to refer back and forth, it helps to limit the amount of people who fall through the cracks.”

-OCOI Grantee
The mission of OCOI was for organizations to collectively shift and enhance the coordination and delivery of services by building systems change capacity that would lead to greater immigrant inclusion and integration.

Over the years, the collective increased in membership and adopted a shared governance model as a symbol of OCOI’s effort to distribute power and control among funders, grantees, and members. These shifts attracted funding from several organizations outside of Orange County.

Funders saw OCOI as an opportunity to support immigrant integration, including some funders that had never funded immigrant issues before. Grantees viewed OCOI as a space where they could learn “the lay of the land” about the region’s immigrant serving organizations.

Interviewees and grantees also mentioned that OCOI’s effort to bring together immigrant serving organizations within the region had never happened before. OCOI grantees, partners, and funders welcomed this unique opportunity to collaborate and strengthen relationships with each other. However, as with all new relationships, trust among grantees, partners, and funders would take time to build.

**Insights from OCOI Members**

“We really were impressed by the number of organizations that belong to OCOI. We had no idea that a lot of these groups existed. Some are big and more popular than others, but it was nice to know the lay of the land when it came to organizations that serve immigrant communities.”

– OCOI member organization

“I think the fact that we formed the opportunity initiative did give us access to funding from outside of the area with GCIR and others. Plus, it brought funders in from within Orange County that might not otherwise have focused on immigrant issues.”

– OCOI Funder
Organizations started to come together and identify other nonprofits and service providers within the initiative as sources of support. Below is an example of how a OCOI’s network of members assisted a southern Orange County organization network and formed a stronger crisis response network among grantees and partners.

Creating a Strong Crisis Response Network

**Women for American Values and Ethics** (WAVE), located in southern Orange County, heard about a group of families that were in danger of being deported midday. Leadership from WAVE reached out their OCOI network and members quickly assembled a group of partners to help with the legal claims and send over clients in need of services. As the one interviewee shared: “All these organizations I contacted about the legal clinic were very keen on helping us, because they've always done it in North Orange County, Anaheim, Santa Ana. They were like, ‘For sure, we'll help you. We'll help you in San Juan Capistrano’, because they knew that there was really a need here too.”

With most of the immigrant serving organizations located in northern Orange County, those located in the southern part of the county often remained unknown or were not included in county-wide efforts prior to the formation of OCOI. For smaller, newer organizations in this region, like WAVE, **OCOI increased their visibility and helped to identify potential local partnerships.**

WAVE joined other small groups in southern Orange County and formed the South County Community Dialogue. More than half of the members of this group were members of OCOI. Together they were able to identify smaller groups in South Orange County that serve the immigrant community. One interviewee explained, “I would say that OCOI was instrumental in getting that group started as well. In that sense, since now there's this group that focuses on South County, we're really building regional capacity to cover the whole county.”
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 these key collective impact roles.

Effective communication and collaboration efforts for OCOI were supported by strong coordination from backbone team members. Grantees identified the Administrative Director, the liaison between funders and grantees, as the “glue” that held the initiative together. She convened OCOI grantees and funders regularly and sent out information and reminders about local immigration centered events in the region. One grantee noted that Administrative Director took the time to listen to them and that she was good at “keeping the momentum of the group going.”

In 2019, OCOI brought on consultants for communications, learning and evaluation, and strategy development. Together with OCOI members, this team identified possible options for the role that OCOI could play in Orange County, lifted-up key stories of impact, convened OCOI members to discuss the initiative’s strategy, and shared findings from these efforts with grantees and funders.

At this moment, communications and strategy development efforts are still underway. The initiative is currently learning about how it might shift its focus to address issues related to COVID-19 and issues of racial disparities related to the Black Lives Matter Movement.

OCOI Backbone Activities

- Holding meetings with grantees and funders
- Keeping the collaborative connected
- Informing the collaborative about events and opportunities that serve immigrant communities
- Acting as the liaison between grantees and funders
- Identify OCOI’s role in the Orange County region
- Build learning and evaluation capacity
- Identifying opportunities to further efforts to collaborate and refine strategy efforts to achieve the mission of the initiative
PART 2: BUILDING REGIONAL CAPACITY

“The commitment and resilience of everyone doing this work and the community at large. Shifting how we work and adapting to everything going on.”

- OCOI Grantee
BUILDING REGIONAL CAPACITY: KEY THEMES & TAKEAWAYS

Over the last five years, OCOI grantee partner organizations have continued to strengthen their individual and collective capacity in order to improve the service delivery to immigrants and refugees in the county. Building regional capacity takes time and requires an intentional shift, from thinking beyond individual services to collective action and systems change. As with all collective impact initiatives, OCOI began with building relationships and increasing awareness of the immigrant needs and service landscape. The following section will highlight the following themes about how OCOI grantee organizations are building both individual and regional capacity toward collective action and systems change.

- 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.

- OCOI helped bridge relationships across regions in OC as well as 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.

Slides 24-26 highlight the collaboration efforts of OCOI member organizations.
BUILDING REGIONAL CAPACITY

OCOI helped individual organizations to build capacity, gain credibility and expand services to immigrant communities.

For **individual grantee organizations**, being part of a larger initiative like the OCOI created more than just networking opportunities. For some smaller, grassroot organizations, it was the first time receiving grant support from philanthropic funders. The additional resources allowed these **smaller organizations to expand their services and reach more immigrant and refugee clients**. Some partners also noted that being part of the OCOI helped smaller organizations gain more credibility, which increased future opportunities of funding.

The large network in the OCOI also helped grantee organizations understand how their specific set of services align with other similar organizations in the region. As a result of networking and regular channels of communication, OCOI grantee partners developed a **stronger referral system, helping the community access the appropriate services more readily**. Finally, being part of the OCOI and building stronger partnerships allowed smaller organizations to leverage the support and resources of larger organizations.

**Grantee and Funder Insights on Building Capacity**

“We have been able to expand our services and open a second office in South Orange County which has allowed us to reach more of an underserved immigrant population.”

“We increased the capacity to provide services, we have better delivery than where it was before. We have better coordination amongst service providers.”

“The most impactful collaborative effort we’ve been able to be a part of is having a large network to refer people to and receive referrals from. We’ve been able to find extra support for clients when their cases are beyond our capacity and we’ve been able to take on clients from other OCOI partners”.

Nonprofit grantees and funder partners agree/strongly agree that OCOI strengthens nonprofits serving immigrants by enhancing direct services*

Nonprofit grantees and funder partners agree that OCOI has contributed to capacity building a lot/moderate amount among service organizations, advocates and/or community residents*

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*Survey data from the OCOI Communications Survey, Communications Lab, 2019*
BUILDING REGIONAL CAPACITY

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

The strengthening network of the OCOI led to more strategic and effective ways to respond to the needs of the immigrant community. Grantee organizations across the three areas (legal, advocacy and organizing, and outreach/education) leveraged resources and tapped into each other’s strengths and individual capacities to increase the region’s ability to support more immigrant community members.

One significant bright spot shared by grantee organizations is the bond work that came out of the OC Rapid Response Network, where multiple organizations came together to release an ICE detainee. Grantee organizations mentioned how these particular efforts required “deeply collaborative” work between various legal and CBO organizations.

There are several other examples of how grantee organizations came together with other organizations to address immediate immigrant rights issues. For example, PLC and CLA Legal Aid helped make legal representation for families more effective through “active collaboration on case management and referrals”. Community Legal Aid SoCal worked with WTLC case workers to obtain signatures for a client who needed immediate public benefits during COVID-19. Education and Outreach grantee organizations partnered with legal service providers and Family Resource Centers and school to better serve families concerned about Public Charge.

The following three slides (25-27) highlight some collaboration efforts of OCOI member organizations.

Grantee and Funder Insights

“Solidified partnerships with our legal partners to best serve our clients during Public Charge threat. Our effort went county-wide with family resources centers, and school collaborations.”

“Collaboration was critical for communication, enhancing resources, sharing in responsibilities, and identifying persons in need of bond funds.”

“Most immigration bonds are the product of deeply collaborative work between OC Justice Fund and organizations based in and out of Orange County, whether it be legal service providers, community organizations, detention advocacy organizations, or other bond funds.”

“We’ve begun bringing in and connecting different OC communities around concerns relating to ICE enforcement in the OC and treatment of asylum seekers and detainees in the OC.”

Nonprofit grantees and funder partners agree/strongly agree that OCOI strengthens the region through coordination and facilitation of direct services*

74%

Nonprofit grantees and funder partners agree that OCOI’s service coordination has had impact/high impact in the community *

91%

*Survey data from the OCOI Communications Survey, Communications Lab, 2019
The Orange County Rapid Response Network (OCRRN) is an interconnected system of non-profit and grassroots organizations, civil rights attorneys, law school clinics, and individuals working together to respond to dehumanizing immigration enforcement activities and policies in Orange County.

OCRRN responded to enforcement actions in the community. Community members can call the hotline to receive rapid response support around legal resources, advocacy, and resources. Resilience OC has invested into a participatory defense organizer to meet the needs of the community when legal service providing is limited.
ICE Detention Release

A volunteer from the LGBTQ Center OC was transferred to ICE by Laguna Beach PD. Member organizations of the OCRRN came together to provide support in many ways that resulted in a positive outcome. The case of the volunteer serves as an example that some OC law enforcement agencies are not following SB54 and, therefore, encourages them to do so. As a state law, SB54 needs to be followed throughout the state and this case served as an example of why. LGBTQ Center OC referred the volunteer’s case to the Public Law Center (PLC). PLC took on the case with LGBTQ Center OC case support. After fundraising for the bond, they eventually won the asylum case.
The “OC Parole Project” is an effort in which PLC partnered with UCI Law, Orange County Justice Fund (OCJF), Resilience Orange County, and Haitian Bridge Alliance in mid-2018 to organize in response to ending of ICE contract with Orange County jails. Service providers and organizations also coordinated and collaborated with Public Counsel and Immigrant Defenders Law Center in efforts to identify, screen, and represent (through parole requests and/or bond) as many as possible to try to release detained individuals.
BUILDING REGIONAL CAPACITY

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

OCOI has helped **break down silos and barriers across the regions’ immigrant serving organizations.** A few partners shared how OCOI has helped bridge South and North Orange County, where organizations previously only serving the north were now willing to support southern OC immigrant needs. Organizations partnering together and working across subregions is helping to strengthen the regions capacity to cover the entire county.

OCOI has also begun to **break down barriers between different immigrant communities.** OCOI grantee organizations shared how the “Bring Human Rights Home Campaign” culminated in a regional cross-cultural coalition of over 20 different organizations. The campaign spoke up about the harmful narrative about Vietnamese immigrants and held local officials accountable and also touched on Central American immigrant issues. This effort led to Little Saigon being recognized as the “hub of cross-cultural organizing”.

OCOI also supported the “We Celebrate Sanctuary Here” community festival (hosted by VietRise and National Day Laborer Organizing Network) that brought together Vietnamese, Latinx and other immigrant communities to support inclusion, compassion, human rights and solidarity. These cross-cultural partnerships are slowly helping to create stronger coalitions that will enable future advocacy campaigns. These efforts are also helping to **shift the narratives around immigrant communities**, demonstrating that together, immigrant communities can advocate for better change.

**Grantee and Funder Insights**

“OCOI supported our “We Celebrate Sanctuary Here” Latinx and Vietnamese festival in 2019. Supported our efforts in garnering a local and national momentum for coordinated cross-cultural coalition work that shifted the political landscape in OC and built on international immigrant solidarity.”

“The Bring Human Rights Home Campaign.. led to changing a dominant culture in the Vietnamese / Little Saigon / Orange County community that criminalized immigrants; and helped develop the organizing and leadership capacity of immigrant community members to make change”
OCOI partners are beginning to collaborate on local advocacy efforts that can help shift narratives, policies and hold systems leaders accountable, but broader narrative change is still a work in progress.

Advocacy and narrative change work is an extremely critical yet daunting task for social change initiatives. Changing narrative is complex and requires the work of multiple actors to challenge existing narratives and create new ones. Similarly, advocacy efforts require additional time and resources for organizations to coalesce and organize around a specific issue. While some OCOI partners felt that the initiative has done very little in terms of large narrative change, it is important to note some “bright spots” or early indicators of narrative change as well as advocacy work.

For example, community festivals and summits are an opportunity where diverse stakeholders can come together to discuss immigrant issues and dispel harmful narratives. In 2018, OCOI partners participated in the state-wide TRUTH Act forums. The OC forum was hosted by OCRRN partners brought together community stakeholders to discuss the collusion between the sheriff department and ICE (in violation of SB54). This also led to UCI and Immigrant Rights Clinic presenting at a Board of Supervisors meeting to bring this issue to the forefront of county officials. In 2019, OCOI and OC Grantmakers hosted the Immigrant Integration Summit to dive deeper into how to promote immigrant integration to create a more equitable region.

OCOI partners have come together to work on advocacy efforts. For example, grantee orgs worked together to gather petitions in support of sanctuary policies. More recently, OCCORD partnered with PWF and other organizations across the state to lobby and gather signed petitions supporting immigrants who were left out of the COVID-19 stimulus package and are now joining forces in the SafetyNet4All campaign. Finally the “Bring Human Rights Home” campaign resulted in stronger organizing capacity and led to OC COVID-19 Community Response Team.

While OCOI is showing traction in advocacy and narrative change, some partners questioned the broader impact the initiative has on narrative change. Several partners wondered what else can be done for the initiative to become a “leading voice for immigrant rights” rather than separate organizations participating in smaller narrative change and local advocacy.

Grantee and Funder Insights

“I would say there is then some positive traction on trying to develop some common messaging, some messaging on the narrative of what it means to be an immigrant in Orange County, the value of the immigrant community, there’s been some good conversation there.”

“Have we become a strong voice in Orange County on immigrant’s rights? No, I don’t think we’ve really accomplished that. I think individual organizations are doing it, but they were doing it previously. Did we bring more credibility to the efforts around immigrant’s rights? I think to some extent we did and that’s how we attracted outside funding, but I don’t think we’ve gone far enough.”

“Each nonprofit is advocating in some way on behalf of their level of participation and addressing the issues. It felt like it needed a voice higher than that. That could speak in general and broader terms about immigrants as a positive part of our community, as opposed to being a problem.”

Nonprofit grantees and funder partners agree/strongly agree that OCOI strengthens the community by advocating for immigration rights*

59%

Source: Measuring Narrative Change, ORS Impact. 2019
PART 3: CONCLUSIONS AND CONSIDERATIONS FOR SYSTEMS CHANGE

“There are people inside and outside of organizations who are always committed to constantly pushing for what’s right.”

- OCOI Grantee
Since its inception in 2015, OCOI has furthered efforts for immigrant integration within a siloed Orange County region. Despite challenging policies and practices, OCOI has been able to bring together immigrant rights organizations and begin to build capacity for collective action. There were two main takeaways from this case study:

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

2. OCOI grantee partner organizations have continued to strengthen their individual and collective regional capacities to improve service delivery to immigrants and refugees.
REFINING STRATEGIES AND SYSTEMS CHANGE

Building the foundation to implement a successful systems change initiative takes time. Collective impact approaches are highly structured and require additional support to convene partners, build trust, shift mindsets and come to shared strategies that address systemic gaps. The current crises unfolding concerning immigrant rights integration, COVID-19 pandemic, and racial justice may create additional barriers, but OCOI partners are meeting this moment with a sense of urgency and continued commitment to strengthen the initiative’s regional capacity to support immigrant communities.

In the next section, we offer insights for OCOI grantees, partners, and funders to consider as they continue to refine their strategies during the current strategic planning process and beyond. Insights are based on issues that were brought up by OCOI partners and are discussed alongside field insights and recommendations about collective impact/systems change efforts. Each issue area is also presented with a set of reflection questions which are helpful for on-going reflection and learning throughout the life of the initiative and can help partners keep a pulse on critical issues.

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
- Service Delivery vs. Long-term Systems Change Strategies
- Collaborating to achieve shared goals

Source: Driving Systems Change Forward, Urban Institute 2020

Artwork by Micah Bazant for Amplifier.org as part of the We All Belong Here Campaign
1. Power, Trust, Relationships and Racial Equity in Systems Change Initiatives

As a collective impact approach, 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 a 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 from all partners. 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”.

Partner Insights

“I do not think adequate trust has been built across the different groups...the different organizations. 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.”

“When you have a position of power and you can change things in an instant when you've been working on something for two or three years, then, you're just like, "No, we're going to shift it." It's very demoralizing for others that we don't have that kind of power. We don't have that power and we've been invested. Yes, it's our job. Yes, it's our work. I think people forget that we, many of us are the community. Many of us are immigrants. Many of us have the story, have the experience, and when you say that, and when you're frustrated, you're not validating what we're sharing.”
1. POWER, TRUST, RELATIONSHIPS AND RACIAL EQUITY IN SYSTEMS CHANGE INITIATIVES

As OCOI enters a new strategic planning process and refine its strategies, the following considerations about power, trust, relationships, and racial equity may be helpful:

**On-going Questions to Consider**

- How can OCOI continue to build trust and relationships between grantee orgs and funders? How can OCOI embrace more open and honest conversations?
- How are power dynamics impacting OCOI’s ability to create a shared vision and a unified voice?
- What does it mean for OCOI to have an authentic shared governance structure? What are some explicit and inexplicit changes in power that need to happen between funder and grantee? How do these shifts in power translate to power building in immigrant communities?
- What “mental model” shifts will be helpful for OCOI partners to implement an authentic shared governance model? (racial equity, inclusion)
- What type of infrastructure is needed to build trust? How can OCCF’s anchor role better support this? What are the benefits and challenges in having a single administrator in charge of convening partners?
REFINING STRATEGIES AND SYSTEMS CHANGE

2. 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. Context and history play a significant role in how OCOI has evolved and where it will go next. A systems change approach requires a critical analysis of the complex relationships between policies and practices, structures, relationships and norms that either facilitate or hinder a particular social issue. OCOI’s formative work was based on understanding the immigration landscape and ecosystem of providers, and as a result many of the grants went to immigrant serving organizations focused on legal, advocacy and outreach/education services. While there is a general understanding that immigration issues can be addressed more effectively as a collective, a systems change approach not only requires a mental shift but also different, long-term strategies. CBOs have become 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. Practitioners of collective impact initiatives suggest that funders need to help build the capacity for individual organizations to deliver services to scale by supporting branding, sustainability, and impact assessment. Even so, 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.

Funder Insights

“[Grantee organizations] have to look out after their own self-interests, there’s no question about it, but there has to be a part of them that can go beyond their self-interest and see that it’s in their mutual best interest to move to a higher-level”

“Service delivery is not going to get you to changing the narrative in the community. It goes to advocacy, it goes to policy. What needs to happen is just an understanding of where folks maybe have an assessment of where organizations fit on this spectrum, and a comfort to be there.”

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


Artwork by Ernesto Yerena and Sheard Fairey for Amplifier.org entitled “We Are Human!”
2. SERVICE DELIVERY VS. LONG-TERM SYSTEMS CHANGE STRATEGIES

As OCOI enters a new strategic planning process and refine its strategies, the following considerations about service delivery vs. long-term systems change strategies may be helpful:

**On-going Questions to Consider**

- How can OCOI continue to build intentional time and space to examine systemic factors through root cause analyses that help identify levers of system change?

- How can OCOI balance being reactive to emerging issues while focusing on long-term goals that address systemic change?

- How are service providers currently contributing to systems change? What is the connection between direct service and long-term goals? What is the negative impact of maintaining the current direct service delivery system as is?

- What capacity building opportunities are being provided so that direct service organizations understand their role in broader social change?

- How can OCOI continue to support grantee organizations in participating in policy advocacy, community organizing and narrative change work?
REFINING STRATEGIES AND SYSTEMS CHANGE

3. 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 is very structured. It requires that partners come to a shared understanding of the problem (i.e., shared vision, shared agenda). There also needs to be the right environment for effective collaboration to take place. Experts in collective impact stress the importance of building a “culture of collective impact”, recognizing an intentional shift for organizations and funders. For example, it is not normal for non-profits to “collaborate”. 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 can be helpful.

Grantee and Funder Insights

“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”

“[OCOI] brought together service providers and funders, but I'm not sure it's led to as much collaboration as it was originally envisioned”

“Is it really a fully functioning collaborative where its collective impact is the model, collective impact is the goal, and really focusing on a shared strategy?”

“The challenge and really the harder push and a harder ask is can we bring these groups together? Is OCOI the table for folks to come together to struggle together, to struggle with what a true collaboration looks like? Can we come out of it with something that's a coherent shared strategy? I don't think we're there yet. I don't think because there's been a lot of demands on the community for the last three years...its been crisis after crisis.”

Artwork by Molly Crabapple for Amplifier.org entitled “Come for One Face Us All”
3. COLLABORATING TO ACHIEVE SHARED GOALS

As OCOI enters a new strategic planning process and refine its strategies, the following considerations about collaborating to achieve shared goals may be helpful:

On-going Questions to Consider

• How can current strategic planning processes bring partners together to develop shared goals/common agenda? How can OCOI build on the existing network to practice co-developing goals and strategies?

• How can the roles and expectations of grantee and funders be clarified?

• How can funders support (time and resources) more meaningful and inclusive collaborative spaces?

• How can OCOI continue to build time for rapid learning through continuous feedback loops that promote collaboration and coordinated responses to emerging issues?
Following an initial “listening session” that was part of the current case study, the new strategic planning process began in July 2020 with the goal of articulating OCOI’s “macro-level change strategies” (i.e., systems change advocacy, infrastructure development (collaborative structure), narrative change, and cross-cultural and multi-racial work) and to engage partners in discussing how the existing initiative hubs of work strategies (legal, outreach/education, and advocacy and organizing) are helping move towards systemic change.

The three issues mentioned in the previous slides are currently being addressed in the strategic planning process and will continue to be important issues to consider as the OCOI work evolves. Below is a timeline of the strategic planning process which is slated to conclude in October 2020.

We look forward to learning about OCOI's shifts in strategy to address the needs of immigrants and their future systems change efforts in Orange County.
APPENDICES
LEARNING AND EVALUATION FRAMEWORK
The evaluation framework below was co-designed with the OCOI team. It outlines the specific topics and questions that were covered within the three learning areas of this evaluation: 1) Strategies, challenges and capacity building at the grantee level, 2) Collaborative partnership and field influence on the initiative level, and 3) Organizational learning at the foundation level.

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<th>Areas of Inquiry</th>
<th>Potential Learning Questions (What we expect to learn)</th>
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| Capacities                       | - In what ways and to what effect are nonprofits/service providers enhancing their organizational capacity through this initiative? What unexpected challenges do grantees experience as a result of increased organizational capacity? How has increased capacity impacted overall funding received by OCOI grantees?  
- How has collaboration impacted grantees? What else is needed to support regional capacity and collaboration? |
| Strategies and Impact            | - How are grantees defining the success and impact of OCOI?  
- In what ways and to what effect are grantees (individual, advocacy, and collaborative clusters) helping to reduce barriers to immigrant services in Orange County, connecting permanent legal residents to citizenship support, building awareness to services related to DACA, and increasing the number of eligible immigrants applying for deferred action?  
- What strategies appear to be most effective across service providers in various sectors? What challenges do they face?  
- How have grantee efforts shifted the collective awareness and mindset concerning immigration issues in the region? |
| Collaboration (process and best practices) | - How is regional capacity and regional collaboration conceptualized among the various clusters grantees? What are the current incentives for these grantees to collaborate? What is the perceived added value of collaboration?  
- How and to what effect is OCOI partnering with other nonprofits, grantmaking partners, and system stakeholders to create a stronger future for immigrants in Orange County?  
- What are best practices for coordinating, leveraging, and aligning efforts as OCOI shifts from a short-term reactive stance to a longer-term proactive stance? |
| Impact of Collaborative Efforts   | - How are funders and other key community stakeholders defining the success and impact of the OCOI?  
- How is this initiative building regional capacity to respond to immigration issues and the needs of the local immigrant community?  
- How has OCOI’s efforts changed the landscape for how people/orgs are working together? What effective collaborations exist across strategies and how can they be scaled up for regional impact? What challenges exist?  
- How can OCOI better support collaboration among grantees and partners moving forward?  
- How and to what effect is the OCOI contributing to the regional narrative (strategic communications, public awareness and education) for immigration issues and immigrant rights in Orange County? |
| Organizational learning (Foundation) | - How is OCOI shifting its internal processes and practices to identify, fund, and support pro-immigrant rights organizations?  
- What internal strategies and practices helped to facilitate the development of the fiscal sponsorship model? How and in what ways has the fiscal sponsorship model lead to growth and shifts within OCOI? What challenges have surfaced?  
- What would sustainable OCOI funding look like in the future?  
- To what extent has OCOI met the expectations of funders, grantees, and partners?  
- What are the implications for OCOI’s future strategy development and grantmaking? |
FUNDER PARTNERS

Blue Shield of California Foundation
Cormura Foundation
James Irvine Foundation
Open Society Foundations
Opus Community Foundation
Orange County Community Foundation
Orange County's United Way
PIMCO Foundation
Sisters of St. Joseph Healthcare Foundation
St. Joseph's Healthcare Foundation Swayne Family Foundation
Tarsadia Foundation
The California Endowment
The Fieldstone Foundation
Ueberroth Family Foundation
Union Bank
Weingart Foundation
Wells Fargo
Individual Donors
GRANTEE PARTNERS

Access California Services
Asian Americans Advancing Justice – LA
Building Skills Partnership
Catholic Charities of Orange County
Catholic Legal Immigration Network, Inc. (CLINIC)
Charitable Ventures of Orange County
Chispa Education Fund, sponsored by Tides Foundation
Clergy and Laity United for Economic Justice (CLUE)
Coalition for Humane Immigrant Rights of Los Angeles (CHIRLA)
Coalition of Orange County Community Clinics
Community Health Initiative of Orange County (CHI OC)
Community Initiatives for Visiting Immigrants in Confinement (CIVIC)
Community Legal Aid SoCal
Council on American-Islamic Relations – Los Angeles (CAIR-LA)
Freedom for Immigrants (CIVIC)
Friends of Orange County Detainees

Home for Refugees
Korean Community Services
Korean Resource Center
Latino Health Access
Legal Aid Society of Orange County
LGBT Center OC
OC Human Relations
Orange County Asian and Pacific Islander Community Alliance (OCAPICA)
Orange County Communities Organized for Responsible Development (OCCORD)
Orange County Congregation Community Organization (OCCCO)
Orange County Immigrant Youth United (OCIYU)
Orange County Rapid Response Network (OCRRN)
Project Access
Public Law Center
Resilience OC
Resistencia Autonomia Igualdad Liderazgo (RAIZ)
Solidarity
The Cambodian Family
World Relief