Moving the Needle

A Reflection on Five Years of Investment in Oregon’s Affordable Housing Landscape
After five years and $16 million in focused investments to address urgent housing challenges across Oregon, Meyer staff reflected back on the challenges, setbacks, clear “wins” and lessons learned from designing and implementing a strategic philanthropic initiative. In addition to robust and lively discussions among the team about what we take forward from this work, we reached out to dozens of key partners in nonprofits, other funders and government to get more perspective on how the Affordable Housing Initiative was received.

We hope you’ll find this brief summary of the biggest takeaways useful and relevant. We see this as a contribution to the rich ongoing dialogue about impact and strategy in philanthropy, and welcome comments, questions and dialogue to promote more shared learning and insight.

Michael Parkhurst, Housing Program Officer - michael@mmt.org
Elisa Harrigan, Housing Program Officer - elisa@mmt.org
Jody M. Marshall, Housing Program Associate - jody@mmt.org
Theresa Deibele, Housing Portfolio Director - theresa@mmt.org
What did five years and $16 million in investment in affordable housing mean for Meyer Memorial Trust and its partners active in affordable housing efforts across Oregon?

By digging into systems change, making long-term investments in nonprofit infrastructure and advocacy, and supporting a deeper engagement with equity and inclusion, Meyer learned important lessons about the possibilities, pitfalls and limitations of strategic philanthropic investment.

In 2014, Meyer began the second, more ambitious phase of its Affordable Housing Initiative (AHI). At that time Meyer was a general-purpose funder active across Oregon in supporting a wide variety of nonprofit-led work. The first AHI (2009-13) had been an experiment in response to sustained demand for investment and an opportunity to impact the field in a more strategic way. The 2014-19 AHI grew out of an intensive process of engagement and priority-setting with key partners in affordable housing work, resulting in increased funding, the addition of two dedicated staff and the strong backing of Meyer leadership to catalyze transformational and systemic change.
In early 2013, Meyer launched an engagement process with over a hundred stakeholders to identify key affordable housing opportunities and challenges in the state such as reduced resources, increasing need, demographic shifts, negative perceptions of affordable housing and transformation of state health systems. Stakeholders lifted up priorities and shaped what became the original seven strategies of the AHI. Continued engagement with field leaders helped Meyer add an eighth AHI strategy in 2014, along with an additional $5 million in committed funding.

A breakdown of Meyer’s AHI grantmaking from 2014-2019 across eight strategy areas

- Advocacy: $2,008,311 / 40 Grants
- Systems Alignment: $1,813,239 / 17 Grants
- Private Market: $2,250,531 / 29 Grants
- Cost Efficiency: $2,858,623 / 16 Grants
- Equity Advancement: $169,012 / 13 Grants
- Ancillary (Technical Assistance): $280,900 / 32 Grants
- Preservation: $750,000 / 4 Grants
- Manufactured Housing: $1,710,000 / 29 Grants
- Sustaining Portfolios: $4,794,272 / 42 Grants

Total: $16,634,888 / 222 Grants
This report shares what Meyer has learned from the second phase of the AHI with our partners and peer funders. In doing so, we hope to grow our collective understanding of how we can equitably and inclusively advance efforts to increase the availability and access to affordable housing in our region.
Three Main Goals

Meyer’s AHI invested $16 million across eight strategic priorities. Grants supported a broad range of activities, from constructing new housing to grass-roots organizing policy research and programs to improve low-income renters’ ability to access housing on the private market.

- Preserving the existing supply of affordable housing.

- Fostering innovation by encouraging new approaches, especially those with a strong bent toward systems change.

- Securing the future by supporting advocacy and other efforts to build a more robust and sustainable resource base for affordable housing.
Five Key Lessons

We’ve distilled what we’ve learned across the five-year arc of the AHI into key lessons that we believe are worthwhile to our partners and peer funders and applicable to programmatic work that extends beyond housing.
1. Center equity and inclusion as the path to real impact

Meyer began the AHI during the early days of the organization’s pivot to an explicit commitment to equity as a core value and its emphasis on learning, iteration and risk-taking. Meyer was still feeling its way into operationalizing that commitment through its grantmaking by 2014, when AHI staff piloted an early version of an equity lens in its first few Requests for Proposals. The four pillars of that early equity lens are still key guideposts for us in 2021: Who will the work serve? Who’s doing the work? Who’s making the decisions? Who was involved in defining the problems and proposed solutions?

The AHI brought home to Meyer that putting the experiences, needs and preferences of the most historically marginalized at the center of the work is not just the right thing to do, it’s the most reliable way to make a real difference for everyone.

As part of engaging grantees as partners in the work, the AHI team worked with housing leaders and organizations throughout the state to support deeper engagement with DEI issues, especially racial disparities that are a defining feature of housing realities in Oregon.

We were open about Meyer’s own challenges and learning process in the work. Our RFPs asked applicants to describe their current DEI work and priorities (both internally and externally focused) as well as demographics of the board and staff. Over time, Meyer more explicitly and emphatically centered racial equity in these conversations and deepened our intersectional analysis of race with the needs of domestic violence survivors, LGBTQ youth, people with severe and persistent mental illness, and others.

Meyer’s efforts both benefited from and amplified a larger wave of attention to equity and racial equity especially. Because of the sustained advocacy of BIPOC-led community organizations, the affordable housing field was changing and important public partners also became more explicit in their expectations around equity. We also saw rural communities expressing different needs and language to engage their communities on racial equity, leading Meyer to develop specific strategies to support the DEI work of rural partners with technical assistance grants, workshops we co-hosted with DEI trainers, and a well-attended statewide Housing Equity Summit in 2019.
There have been stumbles. The original 2014 AHI framework lacked any explicit priority around Tribal housing needs. This omission led us to start a series of face-to-face conversations to better understand the Tribes’ needs and where Meyer can be helpful.

Grantees say they have seen Meyer’s deeper understanding of DEI issues. Suzanne Cross, Columbia Gorge Health Council senior program manager, said Meyer’s equity requirements have increased since the council first started engaging with Meyer in 2016.

“Now there’s more of an expectation around the organization being more diverse in leadership, data being driven by equity,” Cross said. “What I’m seeing out of Meyer now is there’s some expectation of it being intentional.”

“DEI work is not racial justice work. By intentionally centering race in our work, we can take action that makes a difference in the journey towards justice.”

– Mary Li, Multnomah County Innovation Lab director
Intentional and transformational DEI work requires deep investment in culture and partnership. Don’t expect it to be quick, painless or inexpensive.

Equity and inclusion work creates demands on the capacity of your partners and on the capacity of trainers and coaches that shouldn’t be overlooked or underestimated.

Help your partners find peers that they trust to challenge and support them in this work; funders can play a role, but you’re probably not the most effective teachers or coaches for your grantees.

Use your voice and credibility outside of grantmaking; every space where you’re present is an opportunity to be an ally and “accomplice” for equity and inclusion.

It helps to be candid about your own struggles and missteps (personally and organizationally) in this work; we’ve found this is an area where we’re continually learning and adapting.

---

Every space where you’re present is an opportunity to be an ally and “accomplice” for equity and inclusion.
The AHI was fortunate to have a strong financial commitment from leadership and the flexibility to expand on that commitment. The five-year framework sent a strong signal to the field that Meyer was serious about being a reliable partner, coaxing out new partnerships and in co-funding strategies from national foundations. Increasing the total funding for affordable housing opened the door to trying new approaches and fostering innovation.

Neighborhood Partnerships Policy Director Alison McIntosh said Meyer’s long-term commitment made it feel less risky to hire people.

“When Meyer says to housing partners we are in it for the long haul, that sends a message to people that they can make longer term plans – hire people who are organizers or policy people and engage people in change,” McIntosh said.

Rob Prasch, preservation director at Network for Oregon Affordable Housing, noted that the sustained support helped it build momentum and attract national funding.

“That was really a game changer because it put us on the national map and allowed us to join other organizations and convenings of others focused on this work.” Longer-term funding enables more focus and vigilance on impactful work like policy change. “If you’re not paying attention, policies can revert back … to what people were doing in the past.”
The Takeaways

- Make multi-year commitments to partners and reduce the burden on them to extend or renew that support where appropriate.

- Fund advocacy work with the kind of multi-year mindset you’d bring to any other high-priority long-term project, and don’t try to do it on the cheap.

- Be careful about creating a framework that is too detailed and too specific — give yourself room to respond to emerging challenges and new priorities.

- Don’t forget staffing as a critical factor in success.

“When Meyer says to housing partners we are in it for the long haul, that sends a message to people that they can make longer term plans – hire people who are organizers or policy people and engage people in change”

– Alison McIntosh, Neighborhood Partnerships Policy Director
3. Treat your grantees like true partners

Centering equity and inclusion demands shifting the traditional philanthropic posture toward grantees, embracing humility, flexibility and a commitment to go beyond writing checks to actively look for ways to support, elevate and connect your partners’ work. AHI staff were active in formal and informal housing planning and policy conversations beyond immediate grant transactions. We made conscious efforts to expand our circle of leaders and advocates. Learning from partners was essential to fine-tuning and adapting our approach over the course of the AHI.

Mindful of the power dynamics as a funder, we worked hard to listen to partners, especially the ones who could be candid with us about what they needed instead of what we might want to hear. And we had to show them by our actions and funding decisions that we heard them.

Grantees shared that the convenings we hosted that brought people together outside their usual routines were valuable. Looking back, Meyer could have held more frequent events, with more planning and resources committed to the ideas and energy emerging from these gatherings. We also let grantmaking monopolize our time, when more sense-making and sharing was warranted. Moving forward, we believe grantmaking should be a fraction of our time. Staying engaged in community conversations, developing trusting relationships and showing up for opportunities to use your influence in public settings are all labor intensive. They’re just as important as grantmaking for long-term impact.

“Meyer has a unique status as a convenor. They can bring power brokers and decision-makers together to educate, discuss and analyze.”

– Howard Klink, formerly of Housing With Services
The Takeaways

- It’s not easy to get out of the transactional rut that nonprofits and funders find themselves in, but it is possible. There’s no substitute for building trust over time, especially with culturally specific partners who have historically received less funding and access to foundations.

- Don’t forget the unique role of philanthropic funders. Use your ability to fund unproven but innovative pilots, your ability to bring people together in convenings, share national lessons, etc.

- Review your grantmaking and reporting processes: Are you creating unnecessary work for your grantees that you can eliminate? Can you create ways of reporting on and evaluating the work that focuses on sharing lessons learned and candid responses about what didn’t turn out as expected?

- A true partner is flexible and empathetic; give partners explicit permission to change course, timelines and budget when things don’t go as originally planned.

- Don’t overlook other important partners, including other philanthropic funders, key folks in the public sector, and private sector partners whose interests overlap with the changes you’re working for.

We worked hard to listen to partners, especially the ones who could be candid with us about what they needed instead of what we might want to hear.
4. A focus on systems change includes support for advocacy and organizing work

Helping disadvantaged and oppressed communities build their own power can be some of philanthropy’s most consequential work. Unfortunately, funding for advocacy is not common in Oregon, aside from some smaller social justice-focused funders. Without taking sides between parties or candidates, we realize that every decision that matters is political in the sense that it involves conflicts between values and interests and ultimately comes down to power. The focus on systems change, building power and changing narratives also requires developing clarity around the broader context for change: where you have direct and indirect influence, and the timing of different long- and short-term strategies.

The AHI marked an important evolution in Meyer’s involvement in local and statewide advocacy. Beginning with relatively small grants in 2014 and an open and flexible definition of “housing advocacy,” Meyer supported community organizing and coalition building, policy analysis, and messaging and narrative change. As we saw the impact this work was having, Meyer committed to longer-term support at higher grant amounts to an array of organizations, some of whom had not previously been “housing” partners, such as the Oregon Food Bank, the newspaper Street Roots and Business for a Better Portland.

“Meyer seems to understand that without concerted advocacy efforts, some of their housing goals will not be realized. They also have been, to their credit, working on expanding the number of folks at the housing advocacy table.”

– Alison McIntosh, Neighborhood Partnerships Policy Directors
The Takeaways

- Supporting a broader, more robust and effective constituency around the issues that you care about is the only way to create lasting change.

- Funders have more leeway than they often realize to engage in work that affects public policy and decisions around resources (Alliance for Justice is a great resource for understanding just where the boundaries are: https://bolderadvocacy.org/).

- Supporting real change will probably take you out of your traditional grantmaking comfort zone. Supporting and following the lead of organizations at the leading edge of essential struggles, funders may confront “reputational risk,” stirring up resistance and strong reactions from established interests.

**Supporting real change** will probably take you out of your traditional grantmaking comfort zone.
5. Plan and staff with engagement work in mind

The first four lessons drive home the need for the right approach to staffing an initiative: Engagement is labor intensive and requires staff dedicated to the work with experience in the field and relationships on the ground. Some of the most important work we did was outside or between grantmaking efforts, especially in using our ability to bring people together for convenings, work groups and informal networking. Cutting corners here to keep administrative overhead down limits how much you hear and learn from partners and how much others benefit from the unique role you can play as a funder.

A hectic schedule of grantmaking throughout the AHI meant we fell short of the contribution Meyer could have made to the field with more consistent, intentional convenings, creating new connections and outreach beyond well-known partners throughout the five years.
The Takeaways

- Remember grantmaking is just part of the work. The kind of intensive, regular engagement with partners you will want to do and need to do is just as important and more time-intensive than establishing and implementing funding processes.

- Be aware of how the clock and the calendar can work against equity. Building genuinely inclusive processes and relationships won’t necessarily follow your meticulously crafted timetable; know how you’ll respond when equity requires slowing down, circling back or even starting something over.

- In an ideal world, actual grantmaking might be 25-30% of the work; staying engaged in community conversations, developing trusting relationships, and showing up for opportunities to use your influence in public settings are all labor intensive - but often just as impactful as direct financial support.

Building genuinely inclusive processes and relationships won’t necessarily follow your meticulously crafted timetable.
Regional Wins Signal Progress

As Oregon continues to grapple with the economic, political and intersectional barriers to improving the supply of and access to affordable housing, it’s also important to note where progress has been made. Meyer’s deep collaboration with its nonprofit partners has contributed to the addition of significant new public resources at the state and local levels. Among them, funding of $911 million for affordable housing construction through the city of Portland bond in 2016 and the Metro Bond in 2018, as well as an estimated $250 million a year for housing support services through the Metro income tax approved in 2020. State funding has grown from $60 million in 2015 to $150 million in 2019. Dedicated state funding of $25 million for preservation of affordable housing and for manufactured housing is now in place. The field has seen policy wins on renters’ rights and the end of exclusionary zoning.

Oregon is now the only state with rent control and eviction protection. And zoning reforms have grown housing options like duplexes and accessory dwelling units.

Meyer’s aspirations for the AH! live on in its current Housing Opportunities portfolio. We continue to partner in a flexible, open and engaged way with people across Oregon who are actively working to improve access to safe, decent and affordable housing for everyone, with a strong focus on building the power and impact of organizations serving communities funders have neglected in the past.

Meyer’s deep collaboration with its nonprofit partners has contributed to the addition of significant new public resources at the state and local levels.
The Meyer housing team, who administer our programs, run our operations and invest our assets:

Elisa Harrigan  
Housing Opportunities Program Officer

Jody Marshall  
Housing Opportunities Program Associate

Michael Parkhurst  
Housing Opportunities Program Officer

Theresa Deibele  
Housing Opportunities Portfolio Director

Meyer gratefully acknowledges the assistance of Renee Mitchell and Kate Allen in preparing this report, as well as partners from the field who offered their time and insights as we reflected on the AHI:

Janet Byrd  
Neighborhood Partnerships

Brian Hoop  
Housing Oregon

Howard Klink  
Klink Consulting

Beckie Lee  
Hacienda CDC

Mary Li  
Multnomah County

Alison McIntosh  
Neighborhood Partnerships

Rob Prasch  
Network for Oregon Affordable Housing

Mike Steffen  
Walsh Construction Co.

Daniel Valliere  
REACH CDC