GEO
GRANTMAKERS FOR EFFECTIVE ORGANIZATIONS

NORTHERN CALIFORNIA GRANTMAKERS

GOVERNANCE CASE STORY:

The John R. Oishei Foundation

From performance to partnership: Building trust, shifting culture and reframing the board's role

Quick Info

Organization: The John R. Oishei Foundation

Type of grantmaker: Private/independent foundation

Board size: 9–12

Funder's assets (as of Dec 2025): $358 million

2024 grantmaking budget: $12 million

Grant size (range): $2,500–$500,000

INTERVIEWEE:

Christina P. Orsi
President

About the Series

What does it take to build governance that fuels transformative philanthropic practice and lasting social change? At its best, governance sets a strategic rudder that clarifies and maintains focus on an organization's mission and priorities, despite the buffeting winds of fear and resistance that challenge our work. Good governance isn't magic: It involves mindsets, structures and practices that foster frank conversation; reveal power inequities; and harness the contributions of people with diverse lived experiences, identities and talents.

Because boards are an essential lever for change in philanthropy, Grantmakers for Effective Organizations and Northern California Grantmakers are partnering on this series of case stories to surface and promote concrete practices that help funders better align their governance with their mission and values. There's no one right way for grantmakers to do governance, so we hope these case stories provide diverse examples of ways funders have evolved in this area and offer translatable lessons.

For more information and resources, including the rest of the case stories, see GEO's work on governance and NCG's governance page.

About the Oishei Foundation

After founding Trico, a company specializing in windshield wipers, John R. Oishei established a foundation in 1940. The John R. Oishei Foundation was initially dedicated to supporting hospitals, schools, culture and social services in the Buffalo, New York region. Its funding was distributed widely, from supporting the hospital system to funding scholarship programs and capacity building for leaders. In the last three years, the foundation's mission has evolved significantly and is now focused more narrowly on working with communities to change systems and build financial prosperity for a racially just, vibrant Buffalo-Niagara region.

Governance Background and Context

The Oishei Foundation hired a new president, Christina P. Orsi, in January 2022 with the intention to launch a strategic planning process at the beginning of her tenure. Previous strategic planning had involved light "refreshing" of the foundation's priorities and had not used regional data disaggregated by race to understand where issues and disparities were most acute. The board wanted a better understanding of how the foundation's funding was contributing to change in the region, with an emphasis on addressing disparities related to race. Events that year further exposed the racial divide in Buffalo, with a racist attack in May and a blizzard in December that disproportionately affected Black and brown communities.

At the same time, work was underway to change the board's governance practices. The board chair at the time had begun establishing term limits, distinguishing between the roles of board and staff in reviewing grants, and creating more board learning opportunities. But more work was needed.

With the support of her board chair and the help of external consultants, Orsi launched a strategic planning process in 2022–2023 to develop a new strategy and strengthen governance practices. As part of that process, the consultants conducted a board and staff assessment, which revealed a lack of clarity on board and staff roles, a lack of trust, and misconceptions about each other's risk tolerance. "The staff thought that the board was risk averse, and the board thought that the staff was risk averse," recalled Orsi. "I knew we really had some work to do." The strategic planning process engaged the board deeply — in collaboration with staff — over the course of a year.

Levers of Change

Outside support.

External consultants served as a neutral third party to gather honest feedback from the staff and board, lead difficult conversations, and partner with the board in learning and identifying necessary changes. A thorough review of data helped the board and staff to identify specific geographies, populations and issue areas where Oishei's investments could have significant impact.

Radical transparency to build trust.

Orsi deliberately created a highly transparent dynamic between the board and president, establishing the expectation that she would always bring unvarnished information to the board and that they would serve as thought partners and problem solvers with her.

A strategic and learning focus.

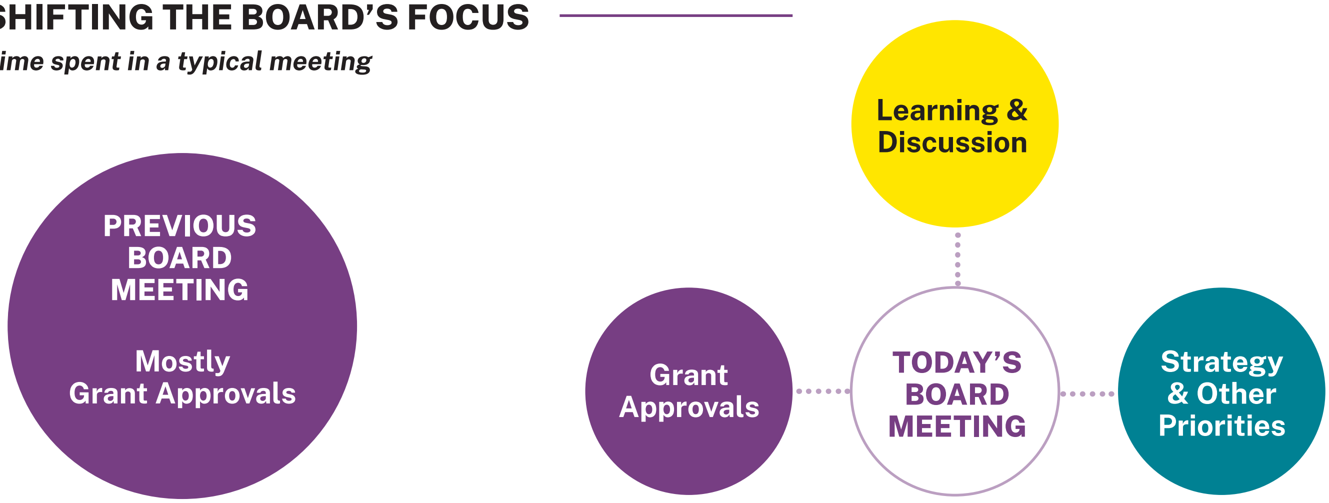
Boards want to be useful, and they will focus on whatever meaty work they are given. In the absence of strategic work, the focus often defaults to grantmaking. A shift to in-depth strategic planning helped Oishei's board change the level of its gaze. After approving the strategy, the board approved a portfolio of wind-down funding for two years, freeing up time the board normally spent reviewing individual grants throughout the year. This shifted the purpose of board meetings and reinforced a different role for the board: Rather than using the time together to approve each grant, the board focused on strategic questions, learning connected to the foundation's strategy and governance mechanics such as committee updates.

Board taking on its own governance improvement process.

As the board moved into its new role supporting the new strategy, it took responsibility for its own learning and growth. The board hired a board consultant to support a board assessment, board learning, attribute-based board recruitment and more.

SHIFTING THE BOARD'S FOCUS

Time spent in a typical meeting



Impact

The new strategic plan, released in the fall of 2023, built on the foundation's existing racial equity work and shifted its focus to address the root causes of racial inequity, starting with Black communities on Buffalo's East Side. This significant change in focus was accompanied by the adoption of a set of values, including "Act against racism," a bold statement of the foundation's commitment to actively addressing barriers faced by residents of color in the region.

As the strategic planning process concluded and the work of implementation began, Oishei's board began to make changes to its own operations to align with the emerging needs of the foundation. The governance committee began reviewing structures and practices such as board member job descriptions, orientation and recruitment, with the goal of centering racial equity. After the intensity of the strategic planning process, the board was willing to extend its board meetings to full days, giving them time for continued learning and generative conversations. The board has shifted its attention to strategic questions such as how the foundation can do more 501(c)(4) funding or influence policy. Grantmaking decisions, once the focus of most meetings, are largely staff-led now, within an approved budget and strategy — with Orsi authorized to approve grants up to $300,000.

OISHEI'S VALUES

Acts against racism:
We are actively countering racism and the systemic barriers faced by Black and other residents of color in our region.

Work together:
We listen to collaborate and build partnerships — across sectors and across differences.

Build on strengths:
We center colleagues' and communities' agency, strengths, resources and opportunities.

Make a difference:
We achieve positive impacts by investing in our own and the region's capacity to learn, improve and change.

Be trustworthy:
We build and sustain trust through transparency, accountability and humility.

Lessons & Advice for Peers

> “I very openly share struggles … It’s not just a rosy, ‘Here’s what’s going right,’ but ‘Here’s where I’m struggling and could use your insight.’”
>
> **Christina P. Orsi**
> *President*

1 Engage external consultants as a third party to support changes to the board.

Good consultants can bring best practices and tested tools and instruments, ask hard questions, support work between board meetings, and coach board members in reimagining their roles. This can lift some of the burden off staff.

2 Prioritize discussion over production.

Previously, Oishei staff would spend significant time and effort in putting together robust, polished information and presentations. “Everything was a production,” Orsi said. Now, most of the time in a board meeting is spent in discussion. Staff might send the board something short to review in advance and then at the meeting discuss, “So what does this mean for us?” The culture has shifted so that staff can now bring in questions or ideas that aren’t fully baked and talk about them with the board.

3 Create enough time for learning.

Oishei has lengthened board meetings and used a consent agenda to allow enough time for deep discussions. Board members have welcomed this shift and asked recently if there were any other agenda items that could be shifted into the consent agenda.

4 Learn from peers.

Board meetings typically start with opportunities to learn from peers doing inspiring work. A peer foundation might share the impact of making 10-year operating grants or how they engage with grantees. This provides perspective for later in the meeting when the board members discuss the foundation’s practices as they relate to what they heard.

5 Build trust.

Orsi regularly spends one-on-one time with board members to build relationships and trust. She’ll have lunch with a board member to socialize new ideas or get their feedback. She also practices radical transparency. “I very openly share struggles,” she said. “It’s not just a rosy, ‘Here’s what’s going right,’ but ‘Here’s where I’m struggling and could use your insight.’” This honesty and investment in relationships has fostered a sense of partnership with the board and built the board’s confidence in her leadership.

For more information and resources, including the rest of the case stories, see GEO’s work on governance and NCG’s governance page.