



# The Overbrook Foundation Strategic Plan 2016 – 2018

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## Background

### Mission

The Overbrook Foundation is a progressive family foundation that supports organizations advancing human rights and conserving the natural environment.

### Values

The Overbrook Foundation:

- Honors its role as a steward of both the public trust and the Foundation's mission
- Advances programs ethically, responsibly and respectfully
- Is transparent and open
- Engages in its work in a deliberate and thoughtful way
- Takes measured risks
- Employs diverse approaches to seize opportunities and respond to challenges
- Supports social justice and environmental sustainability
- Promotes advocacy, accountability and reform of institutions and government

### History – As of February 24, 2016

The Overbrook Foundation was established in New York in 1948 by Helen and Frank Altschul. The Foundation took its name from Overbrook Farm, the Altschul family home in Stamford, Connecticut. In its early years under the leadership of Helen and Frank, the Foundation demonstrated a commitment to a broad array of philanthropic issues including: education; health; human and civil rights; international relations; cultural, civic and social institutions in and around New York; Jewish causes and institutions; and the arts. With the passing of Helen and Frank in the early 1980s, leadership of the Foundation passed to their three children, Arthur Altschul, Margaret Lang and Edith Graham, as well as several of their grandchildren. The estates of Helen and Frank created the Foundation's initial endowment of approximately \$45 million. Between the mid-1980s and 2000, these Directors continued support for many of the institutions and causes favored by the founders and began developing a focus on environmental issues.



During this same period, the Foundation's endowment had increased to the point where it was supplying significant funds for philanthropy. Therefore, Directors began a systematic review of the Foundation's mission, values, programs, governance and management. This led to a decision in 2001 to engage professional staff to further the Foundation's development under direction of a family-led Board of Directors. With professional staff in place, the Foundation continued its shift towards making grants with a focus on defined program areas with clear strategies and intended outcomes.

Overbrook is managed by its President and CEO and is supported by his six-member staff. It remains a family-led foundation with its Board of Directors being third and fourth generation descendants of Helen and Frank Altschul and their spouses. Today, the Foundation has an endowment of approximately \$150 million. It awarded approximately \$6.4 million in grants in 2015. Since its inception, the Foundation has given away more than \$182 million.

In 2010, the Board undertook a strategic planning process in which it committed the Foundation to its mission, as described above. Beginning in late 2014, the Foundation engaged in a systematic process to review strategies and programs, hone those strategies and programs, and strengthen Overbrook as an institution. This document summarizes the outcomes of this review and strategic planning process completed in late 2015.

## **Program Strategies, Initiatives and Outcomes**

### **Overarching Grantmaking and Program Strategy**

*Maximize effectiveness of grantmaking, enhance relationships with grantee partners and the movements in which Overbrook funds more broadly, and strengthen the philanthropic field in Overbrook's targeted program areas.*

#### **Grantmaking**

- **Program.** Overbrook recommit to both of its program areas – Environment and Human Rights.
- **Nexus.** Track the overlap between environmental and human rights programming and explore the inherent benefits of intersectional grantmaking. Whenever this overlap is occurring organically among grantees or potential grantees, seek to support the work at the intersection as it advances Overbrook's mission.
- **Learning and evaluation.** Overbrook consistently seeks to learn from its grantees' work and to evaluate its strategies so as to understand and more fully maximize the effectiveness and impact of its grantmaking.



## **Best Practices in Grantmaking**

- Promote flexibility and agency for grantees. Once the relationship is established, provide general support grants to enable grantees to use the funds for their highest and best purpose.
- Commitment. Recognizing that systemic change takes time, Overbrook generally prefers to make a long-term commitment to partnership with core grantees.

## **Beyond Grantmaking**

- Field-building. For each of its initiatives, Overbrook engages in joint efforts with philanthropic and other partners to leverage its investment and advance a common purpose.
- Strategic assistance and support. As appropriate, provide support to help grantees meet strategic, programmatic, technical and funding needs.

## **Program: Environment**

*Assess and adjust program initiatives to meet gaps in environment funding; utilize Overbrook's funding and influence to conserve the environment and counter climate change; and, consider climate, collaboration and interdependence when reviewing organizations and projects for potential funding.*

## **Initiatives**

- Biodiversity Conservation. Conserve endangered species and habitats by funding organizations throughout Latin America that focus on field-based projects, advocacy, and education.
- Corporate Practices. Support organizations working to reduce the negative impacts of corporate environmental practices in extractive, energy, and production industries, mainly through consumer advocacy, activism, and grassroots initiatives.
- Consumer Behavior. Fund initiatives that use public education, media, and grassroots efforts to influence consumer behavior surrounding consumption, waste, and climate change.
- Innovation. Seek innovative solutions that create new approaches to environmental challenges.
- Movement Building. Strengthen movements within and across the social and climate justice and environment landscape by supporting organizations that bring



disparate initiatives and leaders together into more impactful alliances; central to this work is the Building Equity and Alignment for Impact Initiative.

- *Food and the Environment (Under Development). Build a Food and Environment Portfolio that focuses on organizations addressing the pollution, water, waste and climate impacts of food and its production. As this is currently a possible initiative for the Foundation, focus and strategy is still being considered and active grantmaking on these issues has not started.*

## **Program: Human Rights**

*Assess and adapt program initiatives to meet gaps in human rights funding and to effectively utilize Overbrook's funding and influence to advance human rights. Deepen emphasis on advancing racial, ethnic and gender justice and equity in all initiatives.*

### **Initiatives**

- Gender Rights and Justice. Deepen a gender rights portfolio that incorporates current grantmaking in support of the reproductive justice movement and cross-movement work on reproductive justice and LGBT rights issues. This includes a focus on supporting organizations working across these movements to challenge overly broad religious exemptions being used to undermine LGBT rights, racial justice and reproductive rights.
- Human Rights Defenders. Maintain a focus on funding organizations supporting human rights defenders at risk in Mesoamerica (Belize, Costa Rica, El Salvador, Guatemala, Honduras, Mexico, Nicaragua and Panama) to enable activists and journalists under threat in the region to continue their important advocacy to advance women's rights, LGBT rights, environmental rights and indigenous people's rights.
- Money in Politics. Strengthen Overbrook's commitment to reform issues around money in politics in recognition that, across the board, the corrosive impact of money in the U.S. political system adversely affects all Foundation grantees who use policy, litigation, organizing and advocacy to fulfill their human rights and environmental missions.
- Mass Criminalization and Human Rights (Under Development). *Explore supporting organizations using human rights values, frames and organizing principles in the reform of U.S. systems of mass criminalization. As this is currently a possible initiative for the Foundation, focus and strategy is still being considered and active grantmaking on these issues has not started.*