

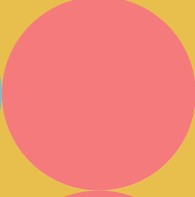
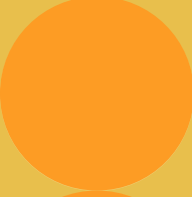
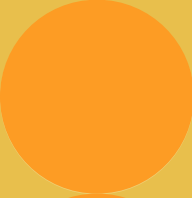
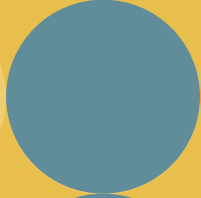


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# DECIDING TOGETHER

SHIFTING POWER AND  
RESOURCES THROUGH  
PARTICIPATORY GRANTMAKING



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*In Deciding Together: Shifting Power and Resources Through Participatory Grantmaking*, we look at why and how funders are engaging in participatory grantmaking and shifting decision-making power to the very communities impacted by funding decisions. Through examples and insights from a diverse range of participatory grantmakers, we explore the benefits, challenges, and models of participatory grantmaking.

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# “Nothing About Us Without Us”

As mental health coordinator for the American Refugee Committee in Macedonia during the Kosovo crisis, Diana Samarasan thought she had seen it all. Nothing, however, prepared her for her first visit to an institution where people with disabilities were being warehoused.

Tied to beds and crammed in small rooms with broken windows, people with disabilities were incarcerated in horrific conditions. Staff told Samarasan that this was ok because the people living there “don’t have the same feelings that we do.”

This was an inflection point for Samarasan, who realized that because of their disabilities, these people were not being seen as human. She decided that she couldn’t be part of a profession where these kinds of things were happening in the name of mental health.

But rather than walk away, she decided to change it. Her goal: To challenge the perception of people with disabilities as less than fully human.

Her timing was fortuitous. In 2006, the U.N. Convention on the Rights of Persons with Disabilities (CRPD) was adopted as the first human rights treaty of the 21st century, emphasizing that people with disabilities are subjects with rights and capable of making decisions about their own lives—rather than objects for charity, medical treatment, or social protection.

Among the people involved in the meetings leading up to the adoption of the CRPD were some donor representatives who wanted to contribute to the movement. There was one problem: There were few, if any, human rights organizations or grantmakers that addressed the rights of people with disabilities.

For some, that may have been an obstacle. For these donor representatives, it was an opportunity to help create something new. That something became the Disability Rights Fund—an unprecedented effort to give persons with disabilities worldwide the resources to build diverse movements, ensure inclusive development agendas, and achieve equal rights and opportunity.

From the start, the fund was committed to an inclusive and participatory process. With Samarasan tapped as a consultant, a group of donors and disability rights activists worked as partners to develop a participatory framework for the nascent fund. They also created guiding principles for making this participatory ethic part of all the fund’s activities, operations, governance, staffing, and grantmaking. “We were absolutely committed to involving people with disabilities at all levels of the fund,” Samarasan says. “It just didn’t make sense to do it otherwise because it would have gone against the rallying cry of the global disability rights movement, ‘nothing about us without us.’ It was also antithetical to the CRPD mandate that persons with disabilities need to participate in decision making affecting them.”

In 2008, the Disability Rights Fund and a sister organization, the Disability Rights Advocacy Fund, were launched under the fiscal sponsorship of the Tides network as the first international human rights funding entities with a participatory ethos embedded in all facets of the organization, including funding decisions. Today, the fund is

legally independent and has people with disabilities on its board, grantmaking committee, global advisory panel, and staff. Half of its grantmaking committee are donors, and half are activists with disabilities from the developing world. In 2019, a majority on both board and grantmaking committee will be people with disabilities.

Samarasan says this structure has been enormously beneficial to the grantmaking process. “When we started, donors didn’t have a lot of information about what was going on in the disability rights movement—the organizations, their priorities, and where resources were needed. But people with disabilities did know all that, so who better than them to provide this information to donors? Without them, we’d have been making decisions about precious resources in the dark.”

Activists also benefited. “They had the chance to learn how donors think,” Samarasan notes, “and what they cared about, which was important because, before that, there was little interaction between the groups. Finding ways to have these kinds of important conversations that cross the boundaries that are common in philanthropy became an important part of our structure.”

William Rowland, one of the fund’s first peer grant advisors and now board co-chair, experienced this firsthand: “I was once a recipient working in adverse circumstances. Sitting at the table with people with the checkbook has been a profound experience for me. It’s a privilege to be at that table, and I don’t take it for granted.”

The structure seems to be working. Since 2008, the Fund has expanded its grantmaking from a seven-country initial pilot to 34 countries across six regions of the world. In 2008, only 20 countries had ratified the CRPD; as of July 2018, 177 countries have ratified it. And, for the first time ever, people with disabilities are included in a major global development framework—Agenda 2030 and the Sustainable Development Goals (SDGs). Samarasan and her colleagues believe this progress stems directly from the participatory approaches they embrace. “We need the voice,

knowledge, and skills of the disability community to ensure that donors’ money will be used effectively and have as much impact as possible. There’s little doubt that this has helped us achieve a lot of impact because we aren’t just putting grants out there for experimentation. Our grants are meeting real needs of the disability movement on the ground. Plus, our participatory process helps to build leadership, which, in turn, helps us build strong human rights movements.”

That’s a far cry from the top-down model used by more traditional foundations, Samarasan notes. “In that approach, you don’t have the space to build and heighten the voices of movement leaders. In a participatory grantmaking setting you do because you’re valuing the voice of leaders and activists as much as you’re valuing, if not more, the voice of donors who have entrenched financial power. That’s a shift in culture and the power structure that a number of human rights donors would like to see happen. We see that as major progress.”



The Disability Rights Fund is a powerful example of the why and how of participatory grantmaking. But it’s only one. This guide features many others doing participatory grantmaking in different ways with diverse communities, offering funders interested in doing participatory grantmaking or supporting those that use this approach a range of options to consider. This guide also raises important questions about power, transparency, equity, and inclusion—values that are the cornerstone of participatory grantmaking.

Yes, this approach can be complicated and nuanced. And yes, it has its challenges. But it also has many benefits that an ever-growing number of participatory grantmakers are seeing. In fact, some say that because these approaches have led to better grant decisions and improved outcomes, not using them would be self-defeating.

Wherever you are in the participatory grantmaking process—learner, experimenter, or experienced practitioner—you’ll find useful information in this guide, as well as in related videos and resources online at [grantcraft.org/participatorygrantmaking](https://grantcraft.org/participatorygrantmaking).

# Participatory Grantmaking: What Is It?

Among the more than 146,000 foundations worldwide, a small but thriving number are using a participatory grantmaking approach. And that small sliver is growing. That's not surprising, given a number of trends that are converging, both in philanthropy and culturally.

Across sectors—in the U.S. and globally—there is growing public demand for more accountability, transparency, and collaboration. Within the social sector, more and more conversations are taking place around equity, community engagement, and inclusive processes. Participation itself has had decades of traction in pockets of the social sector, as well as in other fields such as international development, deliberative governance, community development, and community organizing.

While philanthropy has long supported participatory initiatives in these and other fields, it hasn't yet fully embraced participation in its own decision-making efforts, especially grantmaking. But that's changing.

An increasing number of funders are seeking ways to challenge existing practices and respond to

demands to be more accountable, transparent, and collaborative. As Moukhtar Kocache of the Rawa Fund points out, in many parts of the global south, there is frustration with the usual donor paradigm: "Younger organizations and other emerging groups are pushing back on the current dynamics and refusing to take part in these conditions, including the funding process."

Some funders, for example, are moving from independently deciding what gets done to working with non-grantmakers to make decisions. They're inviting non-grantmakers to help set priorities, develop strategies, sit on foundations' boards or advisory committees, and conduct research. All of these are important components of a participatory approach to philanthropy, and all can be—and are being—used by these institutions at different points in their process.

## HOW TO READ THIS GUIDE

This guide spends more time than others on the "why" before getting to the "how" of participatory grantmaking because it is still a relatively new and unfamiliar approach to many foundations. Moreover, the values and theory of change that undergird it are inextricably linked to how it's practiced.

So, if you're interested in the why, check out the next few chapters, which present participatory grantmaking's core elements, benefits, and challenges. Don't worry—this isn't an academic treatise on theory. We've included many examples of how these core elements, benefits, and challenges emerge in grantmakers' everyday work.

If you'd rather skip to the how, jump to [page 32](#), where you will find tips and insights from participatory grantmakers on how to get started, what to do when problems arise, how to evaluate these processes, and more. There are also some handy tools that we hope can help you and your partners create a participatory grantmaking structure and process that aligns with your needs and goals.

What hasn't been as prevalent is participatory grantmaking, the focus of this guide, which draws on broader participatory philanthropy approaches but zeroes in on how funding decisions get made. Money is power, and power dynamics are ubiquitous in philanthropy. They affect everything from who knows about grant opportunities to who gets those grants and how outcomes are evaluated. But grappling with power issues is often uncomfortable—so much so that these conversations rarely go beyond the surface.

Participatory grantmakers not only acknowledge and talk about power; they break down barriers that keep people powerless through an approach that realigns incentives, cedes control, and upends entrenched hierarchies around funding decisions. This is important, says research by the National Committee for Responsive Philanthropy, because, “As a grantmaker, you cannot truly strive for and advance equity until you understand your own power and privilege in society and in relation to your grantees.”<sup>1</sup>

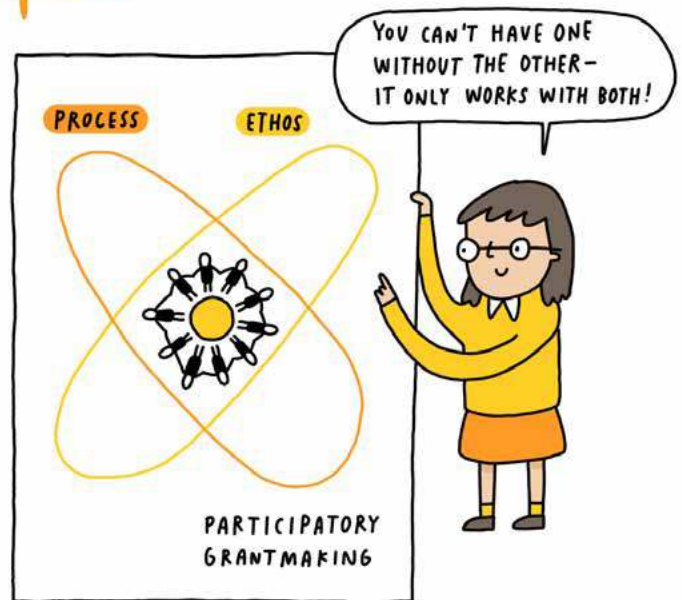
The bottom line: Participatory grantmaking is a lever for disrupting and democratizing philanthropy.

But what exactly is participatory grantmaking? Although there is no formal definition, practitioners doing this work agree that it emphasizes “nothing about us without us” and shifts power in grantmaking decisions from foundation staff to the people most affected by the issues. They also agree that the process itself gives agency to people who benefit from funding to determine the priorities of their own lives.

Reflecting on the above, this guide will use the following definition: **Participatory grantmaking cedes decision-making power about funding—including the strategy and criteria behind those decisions—to the very communities that funders aim to serve.**

That's a seismic change in a field that's long struggled with power issues. It may also be why

PARTICIPATORY  
GRANTMAKING:  
WHAT IS IT?



PARTICIPATORY GRANTMAKING IS BOTH A POWER-SHIFTING ETHOS AND A PROCESS THAT PLACES THE COMMUNITIES A FOUNDATION AIMS TO SERVE AT THE CENTER.

participatory grantmaking hasn't taken hold more broadly—at least not yet. “In participatory grantmaking, you're valuing the voices of activists as much as—and sometimes more than—the voices of donors,” says Samarasan. “That's a major culture shift in power structure that's not easy for more top-down organizations.”

Other barriers that keep foundations from adopting a participatory grantmaking approach are a discomfort with letting go of control, institutional priorities and regulations, and potential conflicts of interest. Nevertheless, some foundations have for years been forging ahead and actively involving non-grantmakers in funding decisions because they believe the benefits outweigh the costs.

*“Our participatory process helps to build leadership, which, in turn, helps us build strong human rights movements.”*

– DIANA SAMARASAN

In short, they're taking the bold step of ceding power over decisions about who gets money and who doesn't.

Funders who balk at such a power shift are diminishing their potential for impact, participatory grantmakers say. "Participatory grantmaking isn't just about sharing power; it's about making good grantmaking decisions," Katy Love of Wikimedia Foundation asserts. "Yes, the people who usually hold grantmaking decision-making power have expertise to bring to the process. But the people living with an issue or in a geographic area are the experts on their lived experience. You need both to make good decisions." As Ana L. Oliveira of The New York Women's Foundation notes, "just because funders have the money doesn't mean we have the knowledge."

Participatory grantmaking has another benefit: It increases participants' sense of agency, power, and leadership. Nadia van der Linde of the Red Umbrella Fund says participants continually emphasize how much they learn from their participation. "They connect with other

organizations or people in the movement and see the benefits of solidarity and learning from peers. It enhances their fundraising skills, adds knowledge to their work, and generates ideas and inspiration."

Like most people-centered approaches, participatory grantmaking isn't easy. It takes time, considerable resources, and a committed willingness to let go of control over decision making. Karina de Sousa, a peer grantmaker, observes that building consensus can be a challenge because it involves working on a team with people from different walks of life to discuss serious issues facing communities with which people have different levels of familiarity. Then, the team decides who gets funded and at what level based on the organization's application, evaluation criteria such as site visits, and the foundation's values and funding priorities. "All of this taken together does not always make for a clear answer and requires a real commitment on the part of the team and foundation staff to getting it right."

Another challenge for participatory grantmakers is evaluating this work. While philanthropy at

## WHAT DO WE MEAN BY PARTICIPATORY GRANTMAKING?

There is no formal definition of participatory grantmaking, but practitioners doing this work agree that it:

- ◆ **Emphasizes** "nothing about us without us."
- ◆ **Shifts power** about grantmaking decisions by involving—or giving all power to—the people most affected by the issues or problems.
- ◆ **Empowers** and gives agency to people who benefit from funding to determine the priorities of their lives.

Reflecting the above, this guide will use the following definition: **Participatory grantmaking cedes decision-making power about funding decisions—including the strategy and criteria behind those decisions—to the very communities that a foundation aims to serve.**

Some other definitions:

**Participants**—People taking part in a participatory grantmaking process who aren't paid foundation staff or donors. Sometimes, the word "peer" is used.

**Grantmakers/Funders**—Traditionally, the paid staff of foundations or other philanthropic associations. Participatory grantmaking, however, sees all participants as grantmakers/funders. Donors are the financial benefactors.

**Experts**—Traditionally, those who have deep knowledge about an issue and formal credentials; participatory grantmaking expands this definition to include people with lived experience as experts on issues affecting them.



large has struggled to standardize evaluation, participatory grantmaking is especially difficult to evaluate because it's more process-oriented, iterative, and relational than traditional grantmaking, meaning its outcomes aren't easily codified or quantifiable. Moreover, participatory approaches have two sets of intended outcomes: 1) effective philanthropic investments and 2) increases in participants' sense of agency, power, and leadership.

These issues and many others are explored in more detail in this guide. Like all GrantCraft resources, it attempts to build knowledge and offer tips, tools, and insights from grantmakers around the world. But this resource is also a little different.

Historically, GrantCraft guides have highlighted practices from more traditional foundations—those with a long history and viewed as philanthropic standards—but participatory grantmaking is not an approach that's widely used by these particular foundations. It is, however, becoming a more common practice among smaller, place- or population-based foundations. By showcasing the work of these pioneering organizations, this guide is helping to lift up a different kind of leadership—one in which meaningful change comes from the “bottom up.”

In short, participatory grantmaking may be a radical shift in how institutional philanthropy operates, but it's one whose time may have come, especially as problems get more complex and, in turn, difficult for experts or conventional institutions to resolve alone. Employing it effectively, says Dennis van Wanrooij, formerly with the Red Umbrella Fund, will require funders “to let go and not only where it feels convenient. Participation is not just about making grant decisions. It's about re-thinking your role as a funder on a daily basis and seeking community participation in all layers of your work. And it's about seeing yourself not as a funder but as a colleague with your grantees, as well as a member of the community. True participation is about supporting, learning from, and partnering with grantees.”

## IN SUMMARY...

- ◆ Participatory values and approaches are increasingly visible—not only in philanthropy but in other domains.
- ◆ More philanthropic institutions and donors are seeking ways to incorporate participatory approaches into their activities, including grantmaking, but the latter is still relatively uncommon.
- ◆ Participatory grantmaking isn't a tactic or one-off strategy; it's a power-shifting ethos that cuts across every aspect of the institution's activities, policies, programs, and behaviors.
- ◆ Practitioners say participatory grantmaking leads to more effective philanthropic decisions and outcomes. The process itself generates outcomes such as changes in participants' agency, power, and leadership.
- ◆ Participatory grantmaking can take more time and incur more costs, but practitioners say the benefits outweigh the costs.

## DISCUSSION QUESTIONS

- ◆ How does your organization define participatory grantmaking? Why?
- ◆ Why is your organization engaged in—or considering implementing—participatory grantmaking? To what end? (Or if you're not at all, why not?)
- ◆ What value will/does this approach have to your organization? To peers? To the community?

## METHODOLOGY

For this guide and related resources, we captured the wisdom of a diversity of individuals around the world through 31 in-depth interviews, with numerous additional perspectives added through conference sessions, videos, and written documentation. (See [page 60](#) for list.) We also asked participants to tell us how they experienced the participatory grantmaking process—what works and its benefits and challenges.

We used a participatory approach ourselves for this guide. A steering committee of five organizations with deep experience in participatory grantmaking provided feedback, edits, and ideas in shaping the final resource. Additionally, formative insight was captured at a planning meeting for Fund Action in 2017.

Throughout the process, important questions and disagreements were raised about specific concepts, strategies, and even definitions. These inflection points were important for us all to acknowledge and embrace early on as inherent to the iterative structure of participatory grantmaking. Among those issues were:

**Ensuring representation/diversity.** We always try to interview people who represent a diverse range of backgrounds, ethnicities, geographies, issues, abilities, and ages. Despite considerable outreach, however, it was difficult to secure interviews with some of the foundations and the number of participants we initially wanted to include. Some of this was due to us taking the time to build trust with practitioners, navigating technology and time zones, and simply time and resource constraints. Recognizing that diversity can also extend to ideologies and worldviews, we acknowledge that the majority of examples in this guide have a progressive social justice or human rights mission, indicating that participatory grantmaking with different missions or foci warrant more exploration.

**What to call participants who aren't foundation staff/donors.** Depending on the fund, participants who aren't grantmakers in their day-to-day job are referred to in a number of different ways: constituencies, activists, stakeholders, residents, partners, or peers. Some, like Terry Odendahl of Global Greengrants Fund, believe that they should just be called "grantmakers" because there is no "other" in participatory grantmaking: "Our participants are actually all grantmakers. We like to say we have 150 program officers around the world." Arundhati Ghosh from the India Foundation for the Arts agrees: "We've never called our work participatory grantmaking. It's just grantmaking because it's what we do and how we do it."

Clearly, this is an ongoing question and for some, more than just semantics. For this guide, we will use the terms "participants" or "peers" to refer to the people engaged in participatory grantmaking but who are not part of a formal philanthropic institution.

**Participatory grantmaking and "traditional" philanthropy.** This guide presents participatory grantmaking as a relatively new approach for philanthropy, but we recognize that participatory practice has deep roots in other fields and sub-sectors such as community organizing, community philanthropy, deliberative governance, participatory budgeting, and many other non-institutionalized practices around the world. Although philanthropy has incorporated some of these practices, the field has been slow to embrace them, especially participatory grantmaking. This is particularly true among more traditional philanthropic institutions, which historically have skewed toward top-down models through which funding decisions are made by paid professionals, donors, and/or foundation staff members, rather than by people directly affected by those decisions. While we recognize that this is slowly changing, in this guide we use the term "traditional philanthropy" to distinguish the top-down paradigm and process from participatory grantmaking.

**Focus on foundations: global relevance.** The majority of people interviewed for this guide are affiliated with a foundation—or directly administered, helped to create, and/or participated in a participatory grantmaking initiative within the context of a more structured entity.

We recognize, however, that there are many other ways in which participatory practice—including grantmaking—occurs. Many communities, especially from non-Western societies, have rich traditions of giving (financially and non-financially) that are not necessarily tied to formal institutions. Instead, these often occur through community-led structures, which are now being increasingly institutionalized around the world. In the U.S., community organizing, deliberative governance, public problem solving, and other democratic systems and processes that have participation at their core have been models for philanthropy as it moves to do likewise. And there are other kinds of formal and informal philanthropic entities—giving circles, crowdfunding, and online donation platforms, to name a few—that have participation at their core. What they have in common is their commitment to the ethos and value system inherent in participatory grantmaking. For that reason, we believe the lessons, tools, and insights in this guide are applicable to a wide and global range of philanthropic structures and initiatives.

# The Core Elements of Participatory Grantmaking

Taken one by one, participatory grantmaking's core elements are not novel. Many donors, in fact, would say that they practice these elements. What makes participatory grantmaking different is that it comprises all of these elements working in concert and is based on participatory grantmakers' belief that turning over decision-making power is the right thing to do.

Participatory grantmakers consider the following to be core elements to this practice:

- ◆ Participatory grantmaking is values-based.
- ◆ The participatory grantmaking process itself is an important outcome.
- ◆ Participatory grantmaking is about more than money.
- ◆ Participatory grantmaking involves community in all parts of the grantmaking process, drawing on a wide range of other participatory practices.
- ◆ Participatory grantmaking's application and reporting processes are simple and flexible.
- ◆ Participatory grantmaking is transparent.
- ◆ Participatory grantmaking builds and strengthens larger social movements.

## PARTICIPATORY GRANTMAKING IS VALUES-BASED.

Participatory grantmaking is a values system that's deeply rooted in everything an organization or group does and how it functions. It centers around an ethos that the people who are being most affected by decisions have a right to make those decisions. That ethos, says Terry Odendahl of Global Greengrants Fund, has been in the fund's DNA from the start because "our founders understood that if we weren't involving people who are affected by grant decisions in those

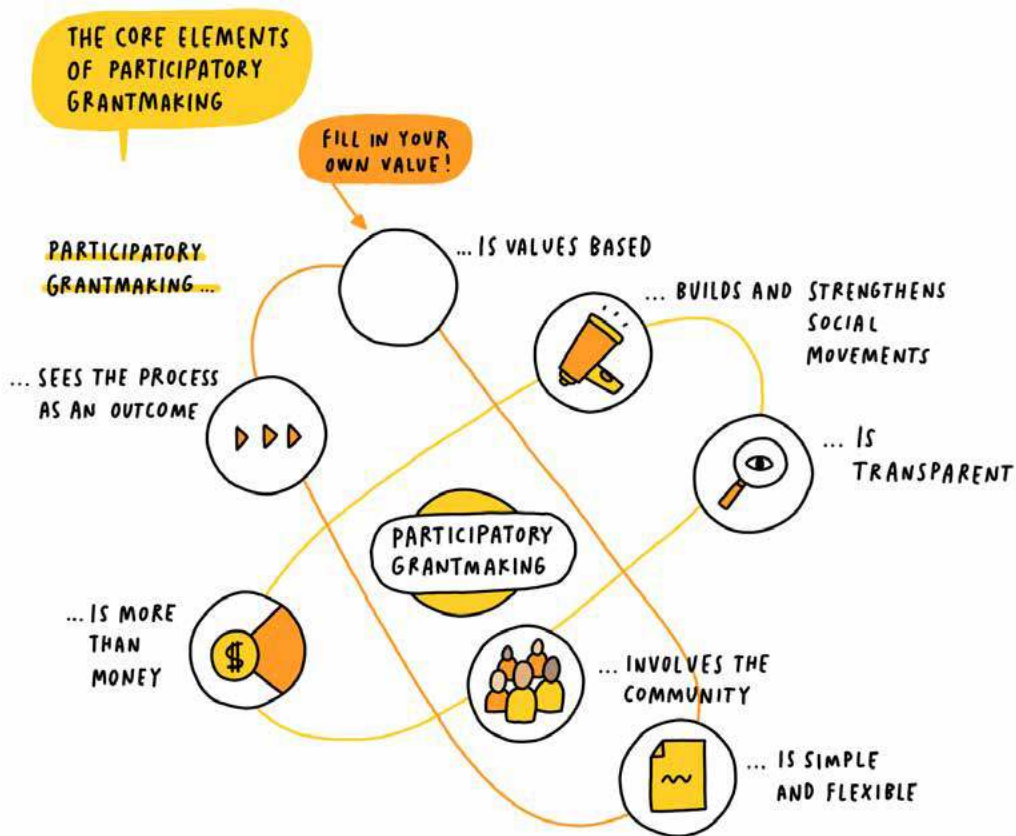
decisions, we were just going to be repeating the structures we were trying to challenge through our philanthropy."

Social justice values—the equitable distribution of wealth and opportunities within a society—are particularly central to the work of many participatory grantmakers. An important part of this values system is the recognition that solutions to real-world challenges aren't going to come from experts who are disconnected from everyday, on-the-ground experience. Instead, says Nadia van der Linde of the Red Umbrella Fund, they have to be created with people who are experts in their lived experiences, including identifying community priorities and new ideas for addressing old problems in ways that advance equity and build trust.

***"Participatory grantmaking centers around an ethos that the people who are being most affected by decisions have a right to make those decisions."***

– TERRY ODENDAHL

Some funders see participatory practice as more than just a philanthropic strategy; it's about what we want our societies to look like. Ana L. Oliveira of The New York Women's Foundation is one who believes that philanthropy is a critical part of civic engagement and shaping the world: "Key to that



THESE CORE ELEMENTS WORK IN CONCERT WITH ONE ANOTHER, MAKING UP THE PROCESS AND ETHOS OF PARTICIPATORY GRANTMAKING.

is being inclusive and democratic—not dependent on the amount of money people can give you. Philanthropy doesn't belong in the hands of the few!"

Sergey Votyagov of the Robert Carr Fund believes that the equity values reflected in participatory grantmaking are what's drawing more funders to this approach, especially newer philanthropists who want their money to make a systemic difference. They also want to consult directly with the people they hope to benefit from their investments. Others point out that participatory grantmaking's values—transparency, collaboration, and involving people directly affected by where funding is allocated in those decisions—can and do bring more traditional donors to the table. They say that these values resonate with both traditional and newer funders because a belief in democratic and inclusive practice cuts across all kinds of foundations.

### THE PARTICIPATORY GRANTMAKING PROCESS ITSELF IS AN IMPORTANT OUTCOME.

Participation isn't just a means to a particular end; it's an outcome itself. By engaging in a participatory grantmaking process, peers have the opportunity to increase their knowledge and leadership about issues, build relationships with others, and, ultimately, deepen their sense of agency to determine the priorities of their lives.

Osgood, an activist who participates in Maine Initiatives' grantmaking, says that their experience has been a rich learning process. "I got a deep sense of the foundation's investment in supporting my leadership, which as a young executive director, was appreciated. It also strengthened our ability to write grants because we saw the kinds of questions funders asked and learned more about the process."

Jovana Djordjevic of FRIDA | The Young Feminist Fund has found that a major value-add of participatory grantmaking is that it invites people who have been left out of traditional decision-making processes. “Like many other groups that have been traditionally disenfranchised, young feminists don’t usually get the chance to make the decisions because others are doing something for or about them. By decentralizing decisions about where resources go and trusting that they’re the experts of their own realities, we’re giving them power.”

*“By decentralizing decisions about where resources go and trusting that they’re the experts of their own realities, we’re giving them power.”*

– JOVANA DJORDJEVIC

YouthBank-Latvia, says Ansis Bērziņš, doesn’t even use grantmaking as the main criterion to evaluate its work because it views the process toward getting results as equally, if not more, important. It believes that trusting young people to make these decisions is important not only in building their critical thinking skills but also in understanding how to make good decisions and working collaboratively.

## **PARTICIPATORY GRANTMAKING IS ABOUT MORE THAN MONEY.**

Participatory grantmakers rarely see money as the sole—or even most important—part of the process. Participants are often provided with an array of convening and networking opportunities, leadership training, and other kinds of assistance. Moukhtar Kocache of Rawa Fund notes that naming the whole process “regranting” would be reductive because the learning, alliances, trust, shared knowledge, relationships, and collaboration that emerge from that process are just as important.

The Arcus Foundation, for example, held annual meetings that brought together activists and grantees so they could strategize together. Similarly, the Dalia Association sees grantmaking as just the beginning of a longer-term relationship that includes convenings, even inviting other communities along so there is an exchange of knowledge, skills, and collective growth. Global Greengrants Fund is using its peer network to develop a new strategic plan because “the people who are part of that network know best what’s working and what’s not, what can be learned from the grantmaking they’re doing, what’s going on in terms of the issues, and a lot of other things that are critical to building movements,” says Terry Odendahl.

## **THEORIES OF CHANGE<sup>2</sup>**

There are several theories of change articulated by participatory grantmakers. The most commonly cited are:

**It democratizes philanthropy.** Because participatory grantmaking cedes control of funding decisions to non-grantmakers—and money is power—it opens up a process that has long been closed to the people closest to the ground with lived experience to bring to bear in these decisions.

**It contributes to better decisions and outcomes.** Involving peers in funding decisions leads to more informed and more effective philanthropic investments and outcomes.

**It promotes social justice and equity.** The participation of traditionally disenfranchised constituencies in philanthropic decision making increases participants’ agency, leadership, and control over the decisions affecting their lives and communities.

**It promotes community engagement.** Participation of peers in decisions about the most important issues affecting them for funding strengthens communities by building trust, connectedness, engagement, and leadership—the building blocks for powerful collective action and broader movements.

The participatory grantmaking process is particularly effective in increasing participants' leadership skills. "Everything we do is part of leadership development. Our board, for example, includes a lot of people who've come up through our community grantmaking process," notes Melissa Rudnick of the Headwaters Foundation for Justice.

Several funders note that empowerment is one of the strongest components that participatory grantmaking offers. Says Sadaf Rassoul Cameron of Kindle Project, "By diversifying decision-making power about resources for the community, we empower and strengthen that community."

## **PARTICIPATORY GRANTMAKING INVOLVES COMMUNITY IN ALL PARTS OF THE GRANTMAKING PROCESS, DRAWING ON A WIDE RANGE OF OTHER PARTICIPATORY PRACTICES.**

Participatory grantmakers involve peers in all parts of the process—designing strategies, stipulating program priorities, reviewing proposals, site visits, and conducting evaluation—not just making grants. "Every time we call for new grants," Jovana Djordjevic of FRIDA | The Young Feminist Fund says, "we make sure there's participation not only in how groups vote, but also in the design of the entire grantmaking process. We make sure we provide what the community needs."

## **IS PARTICIPATORY GRANTMAKING DIFFERENT FROM PARTICIPATORY PHILANTHROPY?**

**Participatory philanthropy covers a wide range of activities such as incorporating grantee feedback into grant guidelines and strategy development, inviting non-grantmakers to sit on foundation boards, and crowdfunding. Participatory grantmaking narrows the focus to how grant decisions are made and by/for whom.**

Some see participatory grantmaking as one of many types of participatory philanthropy. Others see it as distinct because it moves decision making about money to the people most affected by the issues donors are trying to address.

Still others like Cecilia Clarke of the Brooklyn Community Foundation, see these approaches on a continuum based on the degree to which non-grantmakers are part of strategy design and grant decisions. "The most participatory is engaging communities in deciding how funds should be applied through a grantmaking process or community vote like participatory budgeting. Moving back on the continuum are processes in which beneficiaries participate in deciding strategy, geographic or issue focus, and/or funding guidelines. At the other end of the continuum are funders who are listening, being responsive or collecting feedback from communities they're working with or putting out open calls for proposals."

Katy Love from the Wikimedia Foundation sees the relationship between inclusive philanthropy and participatory grantmaking as one in which there can be all kinds of inclusive philanthropy without doing participatory grantmaking. And it's possible to do participatory grantmaking without doing every kind of participatory philanthropy practice. "Whatever approach is used requires a deeper belief in the importance and value of this participation—an ethos that crosses all parts of the institution."

So what's the answer? Grantmakers all have a slightly different take on this, often based in different definitional contexts. But philosophically, one point is consistent: Participation needs to be an essential part of the grantmaking process in some form or another—whether it's helping to develop strategy or making the actual grant decisions—based on the recognition that the people most affected by funding decisions have experience and wisdom to impart to this process. To structure thinking about participation, we've included some commonly referenced models of participation in the [Appendix](#).

Many participatory grantmakers say they devote considerable time to working with peers to research and analyze the issues and/or geographic areas where they are working way before any grants are discussed. And the best way to get that knowledge, says Nadia van der Linde of the Red Umbrella Fund, is to “get out from behind the desk and go ask people in the community or those who are directly involved in those issues.”

When the NoVo Foundation started to deepen their adolescent girls’ rights works focused on migration, for example, they knew the first step was to better understand migration from girls perspectives as well as the existing work happening on the ground prior to grantmaking. “As a result, the foundation hired a team of anthropologist researchers to lead a participatory action research process across six countries that helped shape a more effective grantmaking strategy centered in the lives and solutions of those with lived experience,” says Jody Myrum.

Located in a borough that’s 65 percent people of color, the Brooklyn Community Foundation has a racial justice council that serves as an outside group of advisors. “These are people who fight racial injustice, so they help us apply this lens in our work,” says Cecilia Clarke. “We brought them in early for help because we believe in looking outside for expertise.”

### **PARTICIPATORY GRANTMAKING’S APPLICATION AND REPORTING PROCESSES ARE SIMPLE AND FLEXIBLE.**

Recognizing that reporting and application processes can be burdensome, especially for small organizations, participatory grantmakers try to make these as easy as possible. Diana Samarasan of the Disability Rights Fund, for example, explains that there are sometimes emergent groups with good ideas but little capacity to capture that in a proposal or to completely fill out the application. “Rather than toss them, we say, ‘This is a great idea, but you left out your budget’ and then we help them complete it.”

The Brooklyn Community Foundation scrapped its grant reporting process altogether and instead

invites grantees to report on their work in ways they believe are more effective. They encourage grantees to talk about the big issues they’re facing, what they’re doing, and other challenges they see coming up, rather than “Did you do what you said you’d do with the grant?”

***“If we’re trying to show that there is creativity at the community level and that community people know best how to get themselves out of problems but we limit their tools and solutions, it’s a farce.”***

– MOUKHTAR KOCACHE

A less formal and structured application process can have advantages, like the option to ask open-ended questions and surface innovative ideas. Rawa Fund is designing a less formal application as a response to common nonprofit feedback because they became tired of donors deciding what should be funded, which was leading to grantseekers creating things they didn’t really need. Moukhtar Kocache explains, “If we’re trying to show that there is creativity at the community level and that community people know best how to get themselves out of problems but we limit their tools and solutions, it’s a farce.”

### **PARTICIPATORY GRANTMAKING IS TRANSPARENT.**

Transparency is fundamental to participatory grantmaking, and the Wikimedia Foundation is a good example, says Katy Love. “Our annual planning and reporting process is done publicly online. Our staff meetings are streamed live and available in recorded format on YouTube.” Beyond transparency at the grantmaking stage, Wikimedia’s organizational planning process is also transparent and invites revision and feedback from its community members.

At the Knight Foundation, says Chris Barr, “Transparency is an important value because our foundation comes out of the journalism world, at the heart of which is transparency. It’s in our DNA. So, we try and share our work to the point

where our volume of communications in relation to the larger philanthropic community is huge. We try and be as transparent as possible when we get questions from the press about what we're doing." Haleh Zandi, who participated in a Shared Gifting Circle with RSF Social Finance, affirms that the process "builds a culture of cooperation and spreading wealth, rather than competition and a lack of transparency in philanthropy."

While transparency is a key component to many participatory processes, especially as it relates to communication, being considerate of the identities community members hold is crucial. For example, publicly naming the community members who are working with the Red Umbrella Fund—a global fund by and for sex workers—could put them in significant danger, so the fund takes steps to ensure their protection.

### **PARTICIPATORY GRANTMAKING BUILDS AND STRENGTHENS LARGER SOCIAL MOVEMENTS.**

Many participatory grantmakers see this approach as a critical part of building larger movements in support of important issues such as gender equity, LGBTQ rights, human rights, racial justice, and many others. "When you have a participatory process, you're also building leadership, which is critical to building movements that are going to be effective in achieving rights," Diana Samarasan of the Disability Rights Fund notes.

Alarmed at the rapid growth of austerity policies and growing inequality in Europe, the Open Society Foundations decided to support new initiatives aimed at defusing its influence. The foundation began by exploring what kind of intervention or strategies were most needed and potentially effective—a process, says Tin Gazivoda of Open Society Foundations Europe, that required the involvement of local activists if it was going to be successful. "Yes, we had resources to support important parts of the overall movement, but we also knew that if we were going to get results, activists, not donors, needed to take a leading role in making decisions about when and where strategies would be best applied."

Movement building is an integral component of the Red Umbrella Fund's evaluation process, which not only looks at whether they are building stronger sex worker-led organizations, but whether they are building a stronger sex worker rights movement overall.

For Angelica Quesada, a member of the Catherine Donnelly Foundation's Righting Relations program, the participatory grantmaking process allows for valuable cross-movement pollination. "The learning and capacity building happens at regional and local sharing circles where barriers between individuals who mobilize, organize, and advocate for their communities come down." Connecting with people from diverse movements like immigrant rights, Indigenous rights, and disability rights promotes "collective responses and new ways of personal relations... Thus we not only understand how we all have our personal challenges, but also how are they connected at the systemic level."

### **DISCUSSION QUESTIONS**

- ◆ In your organization's efforts to plan or implement a participatory grantmaking effort, are all these core elements apparent? If not, what can be done to ensure that they're included?
- ◆ What are the core values behind your participatory grantmaking effort?
- ◆ What other kinds of participatory practice will you bring into the grantmaking process? Will peers be part of strategy development?
- ◆ How will you ensure transparency in every step of the process?
- ◆ To what degree will your effort help strengthen the larger field or movement behind the individual grants?
- ◆ How can you involve peers in helping to streamline application and reporting processes?
- ◆ Are there additional core elements that could be added to this list?



# The Benefits of Participatory Grantmaking

The key elements to participatory grantmaking explored in the previous chapter are—perhaps not surprisingly—also its benefits, and deliberately mirror one another. Foundation staff and trustees who embrace participatory grantmaking have essentially opted into it because of its core elements.

The following are the benefits that participatory grantmakers cite most often:

- ◆ It allows for a more thoughtful and informed decision-making process.
- ◆ It strengthens trust and credibility between donors and the constituencies with whom they work.
- ◆ It promotes diversity, equity, and inclusion—in both the process and the outcomes.
- ◆ It gives participants opportunities to share information, network, and develop collaborative efforts—all of which strengthen the larger movements in which they're involved.
- ◆ It allows grantmakers to identify new initiatives and take more risks.

## IT ALLOWS FOR A MORE THOUGHTFUL AND INFORMED DECISION-MAKING PROCESS.

Like many participatory grantmakers, Katy Love of the Wikimedia Foundation is adamant in her belief that participatory grantmaking isn't just about sharing power; it's about making good grant decisions. "By democratizing decision making and allowing people with the most expertise and experience on an issue to dictate investments, it can lead to more mindful and impactful giving," she says.

Nadia van der Linde of the Red Umbrella Fund shares how in her fund, community members

around the world read and discuss the grants being considered—a process that she says leads to stronger outcomes. "These peer review panels take it so seriously because they know best what the consequences are of not getting that grant. That's very different from one person sitting behind a desk making decisions based on which proposals stand out to them, which is why we think our process leads to more strategic grantmaking."

***"By democratizing decision making and allowing people with the most expertise and experience on an issue to dictate investments, it can lead to more impact and mindful giving."***

– KATY LOVE

One funder who worked for a United Nations grantmaking initiative says that its reliance on "three people in a room making a decision" made her uncomfortable because they had never been to the countries they were investing in, nor did they have any experience in the issues. Also, there was a tendency to prefer organizations that "looked good on paper." Now that she's a participatory grantmaker, she feels more confident about grant decisions because "if we make a mistake, it's based on information we got from people working in the movement on those issues—not just me, a single program officer, making a decision. And we all learn from those mistakes—together."

While certainly not all grantmaking programs are disconnected from the communities where they're investing, many foundations still operate in ways that keep them at arm's length from what's happening on the ground. That information can be extremely important in developing effective strategies, as well as making good grant decisions. "There's no question that bringing in peers to strategy development gives donors the chance to learn about the regions and contexts where they're funding in ways a single program officer could not," Jovana Djordjevic of FRIDA | The Young Feminist Fund says. "Because we're involving so many different people, we can see where our strategies are making sense. We get a better analysis of what's going on and what groups need."

### **IT STRENGTHENS TRUST AND CREDIBILITY BETWEEN DONORS AND THE CONSTITUENCIES WITH WHOM THEY WORK.**

Nim Ralph from EDGE Funders Alliance believes that building trust starts with funders relinquishing their own expectations of outcomes and respecting the wisdom of the folks participating in this process. He admits this can be a challenge for donors who are holders of power.

***"When funders step in and don't provide funds in a participatory way, they can exacerbate that distrust, even among mission-aligned organizations."***

– ANONYMOUS

Soon after Cecilia Clarke became the new director of the Brooklyn Community Foundation, which had historically operated more like a bank, she started building trust with the community by using a participatory approach to strategy, which led to participatory grantmaking. That's because she wanted to establish the foundation as community-minded and committed to sharing. "I wanted the foundation to convey that we weren't the experts but were counting on the community to keep us informed. That message also helped me, as a new director, steer our board in a new direction because I was able to say this was what the

### **OVERHEARD...**

"When decision making is collective, and the organizational structure is horizontal, there's much more honesty in the process, more civic engagement, and the sense of ownership among local grassroots leaders is radically different than in a top-down process where groups are infantilized in a patriarchal manner. We see more voluntarism and more local investment in initiatives when people own the process. We see learning at the community level that's used in other initiatives. Leadership tends to stay within the community when there are participatory processes vs traditional philanthropy context where local leadership is often exiled to a large foundation that's been supporting them or other large nonprofits. We see a sense of pride in carrying out an initiative in a more authentic collective manner. And there's more creativity in the process."

– MOUKHTAR KOCACHE

community said they wanted and needed—not what I thought the vision should be."

In addition to being hard to develop, trust, when lost, can have serious consequences. A participatory grantmaker tells the story of one donor who gave large grants to a set of organizations but insisted on micromanaging their efforts. Over time, grantees began changing their programs to do what the donor wanted, rather than what peers said was needed in the region. That led to peers losing trust in these organizations and question their commitment to larger movement goals. The lesson? "When funders step in and don't provide funds in a participatory way, they can exacerbate that distrust, even among mission-aligned organizations."

### **IT PROMOTES DIVERSITY, EQUITY, AND INCLUSION—IN BOTH THE PROCESS AND THE OUTCOMES.**

Funders talk about needing and/or wanting more diversity in their institutions, processes, and populations served, and participatory grantmaking offers a viable pathway. As Mutisya Leonard of UHAI EASHRI says, "the values of inclusion and

diversity are baked into the process itself.” Because participants have a more intimate understanding of the issues, networks, assets, and disparities in their communities, a process that shares power allows that knowledge to surface.

Central to building a diverse and equitable participatory grantmaking structure are trust, transparency, and ceding power. Trust is fostered through shared decision making, a process in which participants have privileges and power that are often inaccessible to them.

***“The values of inclusion and diversity are baked into the process itself.”***

– MUTISYA LEONARD

Much participatory grantmaking is structured around communities where peers have been marginalized because it is these voices, practitioners say, that need to be brought to the fore in decisions that traditionally have been made without them. Greater diversity and inclusion of people with a range of identities also enriches discussion and helps disrupt funding patterns that keep the communities that need funding the most from securing it. Similarly, transparent communication about needs, goals, strategies, and decisions neutralizes the secrecy that can fuel discrimination, corruption, and malfeasance. Maine Initiatives’ Grants for Change Program, for example, makes sure that its grantmaking committee represents the state’s populations in terms of gender, class, race, culture, and other areas—resulting in a mix of people who typically don’t find themselves at the same table. “We use this process to build relationships and social capital in our community,” Philip Walsh says. “It’s also been instrumental in creating more effective strategies to address inequities because the community has deeper and more profound knowledge, wisdom, expertise, and social networks to advance racial justice. Our process was designed to bring to bear these collective community resources.”

Sadaf Rassoul Cameron of Kindle Project points out that in addition to racial, ethnic, gender, and other

forms of demographic diversity, having a diversity of expertise, knowledge, and/or life experience in these processes is also important because there’s also a lot of variance within each of these areas. For example, “people may have different levels of experience or knowledge about an issue, so it’s important and try to represent as many different points as possible on these spectra.”

Redefining who is an expert is also important to understanding the importance of diversity and inclusion because traditionally, experts have been seen only as people with academic rigor, reputation, or credentials. Expertise, participatory grantmakers say, is also reflected in people’s lived experience and insights.

### **IT GIVES PARTICIPANTS OPPORTUNITIES TO SHARE INFORMATION, NETWORK, AND DEVELOP COLLABORATIVE EFFORTS.**

Many participatory grantmakers are intentional about incorporating opportunities for activists and peers to convene to share ideas, strategize, and co-create action plans. FRIDA | The Young Feminist Fund, for example, holds annual meetings in every region and sub-region where it works. These meetings not only help to enrich overall discussions about strategic direction for individual organizations and the overall movement, but also create robust learning networks for peers to learn about what’s working and what’s not.

***“By coming together in participatory processes, these communities are able to build strong relationships across the sector.”***

– NADIA VAN DER LINDE

That’s especially important for peers who typically don’t have a lot of opportunities to convene, says Jovana Djordjevic. These kinds of gatherings are important because they help activists feel connected to a larger movement. FRIDA also has a digital knowledge-sharing platform that allows organizations to convey what they did and how they did it. Grantees complete a capacity-building form that evaluates their skills, including areas

where they need help, which FRIDA uses as the basis for its peer-to-peer learning program.

Nadia van der Linde firmly believes that participatory practice creates stronger connections across communities: “The process provides participants with a clearer understanding of the areas in which they’re working; the ability to address gaps; the networks to collectively advocate for policy change; and an enhanced sense of belonging.” The latter, she says, is particularly important for marginalized and vulnerable communities. By coming together in participatory processes, these communities are able to build strong relationships across the sector, “enabling honest discussions and the development of peer support and mentoring networks that last far beyond the grants.”

### **IT ALLOWS GRANTMAKERS TO IDENTIFY NEW INITIATIVES AND TAKE MORE RISKS.**

Moukhtar Kocache of Rawa Fund believes that one of the main drivers of participatory grantmaking stems from a tendency of traditional foundations to support “programming and organizational development that’s not very creative and inclusive.” He observes that while foundations can start out supporting grassroots organizations or movements, over time, they “start to fund the same groups, and those usually aren’t the smaller or emerging community-based groups doing really creative interventions or responding in a more authentic manner to the needs of their communities. As a result, a lot of solutions, agency, and creativity aren’t being supported, which is especially noticeable among youth and marginalized groups.”

Funding decisions that are based on the collective knowledge of peers, rather than one or two professionals sitting in an office, can give investors the chance to take more risks, says Mutisya Leonard, because “you’re partnering with people on the ground who know what’s going on and can give you rapid feedback about your progress. And they know the applicants, so they know who’s a good bet. In short, you’re not removed from what

happens after you write a check.” Not to mention, he adds, that it’s a good diligence check, which can be a cost savings for foundations.

Making decisions without input from community members directly involved in an issue is itself a risk because it excludes contextual knowledge that is essential to good grantmaking. Kindle Project relies on community participants to identify and support promising projects outside of mainstream philanthropy—the ones who are less likely to be funded. By providing a fund with no strings attached, they allow the seeds of an idea to grow over time.

### **DISCUSSION QUESTIONS**

- ◆ What do you think are the most compelling reasons to undertake participatory grantmaking? Which would be most resonant with your colleagues and why?
- ◆ Are there benefits that aren’t included on this list that you think would be appealing to colleagues who are skeptical of this approach?
- ◆ How might your current grantees benefit from being involved in the grantmaking process?
- ◆ Do these values align with any of your current goals?

## PARTICIPATORY GRANTMAKING: THE NEXT WAVE?

Interest in participatory approaches to philanthropy has risen in recent years, both by donors interested in adopting these approaches themselves, and also by donors interested in supporting participatory approaches that others are organizing. Why?

**There is a growing awareness that closed-door grantmaking practices are not leading to desired change.** Despite philanthropy's efforts to enhance its accountability to the public, critique about the field's lack of transparency continues to grow. This reflects not only the public's waning trust in institutions but also a backlash against the "establishment" that has buffeted the media, education, and politics. Against this backdrop, some foundations are beginning to pay greater attention to learning from those they seek to serve instead of perpetuating the top-down, expert-driven approach that traditionally has characterized their work. This departure from "business as usual"—and awareness that accessibility and transparency matter—has also pushed foundations to experiment with involving non-grantmakers in their activities, such as identifying grant priorities, creating guidelines, and making funding decisions.

**"People power" is on the rise.** Today, technologies are giving people access to systems and institutions once controlled by experts and other gatekeepers. Amid growing fears that democracy is under threat, there has been a surge in the number of civil society organizations internationally—a part of a global associational revolution—that emphasizes civic participation, empowerment, equality, and justice. While many non-western societies have deep histories of participation through horizontal, community-led structures, these models and values are being increasingly institutionalized around the globe.

**Organizations are becoming more fluid.** The speed and multiple venues through which change now occurs have prompted organizations to adapt structurally. Today, there is a pronounced shift from hierarchy, rigid departments, and job assignments to streamlined systems that allow for collaboration, openness, and horizontal decision making. Some organizations are forgoing physical structures altogether and morphing into virtual entities or networks that can be more cost efficient and nimble. In this new world, foundations that continue to operate in traditional, tightly controlled, top-down environments risk losing relevance, not to mention employees and partners.

**New generations are driving new attitudes and approaches to philanthropy and social change.** Social change is being reshaped by the attitudes and capacities of young people who've grown up with the Internet and embrace its efficiency, transparency, bottom-up action, and co-creation ethos. People are also challenging conventional notions of hierarchical leadership, preferring collaboration and horizontal arrangements in which "everyone's a leader." Young people are bringing a similar mindset to philanthropy, preferring giving circles, crowdfunding, and other charitable giving that emphasizes consensus building, openness, and collaborative decision making, rather than traditional processes that occur "at a distance" or "in secret." Youth grantmaking, in fact, is seen by some to be the most scaled form of participatory grantmaking.

**Increasing integration of cultures highlights the need to draw in more voices.** Demographic changes are pushing traditional institutions to reexamine how they work. By 2043 the U.S. population will be more than 50 percent people of color.<sup>3</sup> Technology, globalization, and travel have also increased exposure to different traditions, experiences, and perspectives. As a result, activists are recognizing the need to be more inclusive in advocating for laws and norms that accurately represent and address the problems people face.

**Public problems are too complex for traditionally defined experts or institutions to solve alone.** Because many of the challenges people are facing are too complex for just one solution from one group of experts or institutions, public officials, nonprofit leaders, school administrators, and other decision makers are asking for more help from the public. Involving more diverse voices in community decision making informs and enriches those processes in ways that build trust and collaboration, which can lead to better outcomes. One of the best examples of this is participatory budgeting, which began in the Brazilian city of Porto Alegre and has since spread to more than 1,500 cities in Latin America, North America, Asia, Africa, and Europe.<sup>4</sup>

## HERE'S WHAT WE HAVE TO SAY—INSIGHTS FROM PARTICIPANTS

We asked several peers what foundations and donors did to help make them feel engaged and empowered as equal partners in the participatory grantmaking process. Here's what they said:



### THEY LISTENED TO, VALUED, AND TRUSTED US.

"While it was their job to make sure we stayed on track, they were also excellent soundboards and truly listened to our insight and takeaways. Most importantly, they genuinely deferred to our expertise when it came down to decision making. That sense of trust and interest in us bringing our whole selves to the process was critical to the experience." – Karina de Sousa

"They listened! They respected and valued my input. And they trusted us in a deep way. It's unusual for funders to trust that things are evolving as they should." – Ishbel Munro

### THEY CREATED A SAFE SPACE FOR US.

"They created an equal, safe space based on values we all shared and modeled powerful yet respectful behavior. They assumed the best and trusted we would rise to the expectation." – Ihotu Ali

"It was difficult for an indigenous woman who was a member of our steering committee because the way of working was culturally different, and she felt disempowered. Rather than just saying "oh well" and looking for another representative as many organizations do, the foundation took action to make it a safe space to address the situation. They added a support person for the indigenous woman, smudged the space prior to the meeting, and added a grounding or prayer and smudge to the start of meetings. The national facilitator reached out to the support person for advice on how to be more inclusive." – Ishbel Munro

### THEY HELPED US BUILD STRONG RELATIONSHIPS WITH ONE ANOTHER.

"They did an amazing job building a community among grantmaking teams in the short amount of time available for doing so. This happened both through formal, facilitated dialogues about relevant topics and informal social gatherings where we simply got to know each other." – Angela Butel

"The foundation has done too many things to count to make me feel empowered. During my first site visit, a co-fellow asked our foundation representative whether we were going to be the only ones talking. She smiled and said, "Yep, that's the idea." The confidence she had in our ability that she expressed to us in this moment was incredibly empowering and is only one example of the many times it has happened. A more personal empowerment source is the transformational experience of being in a space with 20 or so young and adult women who are genuinely some of the most intelligent people I know and working through the foundation to do

amazing things for the community I'm a part of. Working with them provided me with role models that I get to interact with in real life, instead of the glorified celebrities I'm used to seeing; they are down to earth, yet strong-willed and passionate and these are attributes I admire and seek to adopt." – Kali Hough

"The most rewarding part of this experience was watching each of us self-reflect and grow, continually deepening our relationships with each other, being honest, struggling and grappling with issues together, and knowing our collective wisdom will see us through." – Ishbel Munro

### **THEY MADE DIVERSITY AND INCLUSION A PRIORITY.**

"The New York Women's Foundation's participatory grantmaking committees bring together women from all backgrounds and walks of life. On each of my teams I have had the privilege of working with incredibly interesting people, with shared values and sense of commitment to our community. On the Participatory Review Committee, it was particularly meaningful to work with other young women of color and meet with organizations working to support girls and young women of color." – Karina de Sousa

### **THEY WERE THOUGHTFUL ABOUT PLANNING.**

The team was extremely thoughtful—from managing scheduling to ensuring panel members were connected and familiar with each other. The process was deliberate and meaningful. It's clear the team has honed their grantmaking and used best practices to empower its panel members to be as open and attentive as possible when interviewing potential grantees and making their recommendations. – Vince Wong

The foundation staffed each team with incredible program officers who were very thoughtful in providing guidance and direction throughout the grantmaking process. – Karina de Sousa

### **THEY HELPED US LEARN ABOUT PHILANTHROPY AND GRANTMAKING.**

"I have learned a great deal about grantmaking processes and donor prioritization. All the review and engagement processes are open, clear, and transparent to the participatory grantmaking committee (PGC) members. I have also learned and grown through the requirements and commitments to confidentiality and conflict management. The diversity of the PGC ensures that the interests of marginalized voices are protected. Whenever disagreements and conflicts of opinion emerge among PGC members, we adhere to laid-out process and policy to resolve them through voting or consensus building. The PGC deliberations and funding decisions are stigma-free and discrimination-free, with no prejudicial consideration on the basis of gender, gender identity, or sexual orientation. In my participation at the PGC I have learned a lot." – Hamil Salum

### **THEY GAVE US MONEY TO DISTRIBUTE.**

"They have always made me feel that I was doing important work in my community by doing my own work, but giving me actual money to distribute was huge." – Erika Wanenmacher

"I was once a grant recipient working in adverse circumstances. Sitting at the table with people who hold the checkbook and helping to make those decisions has been a profound experience for me. It's a privilege to be at that table, and I don't take it for granted." – William Rowland

# The Challenges of Participatory Grantmaking

All philanthropic approaches have challenges, and participatory grantmaking is no exception. But participatory funders say that while it can be nuanced and complex, that's no reason to reject it out of hand. In fact, grappling with these challenges is part of the approach itself.

As Allison Johnson Heist of Headwaters Foundation for Justice notes, "Tough issues and questions will come up in this process, especially about power, and this isn't a bad thing. It's just part of doing the work this way."

By digging into these issues—rather than avoiding them—funders wanting to do or refine their participatory grantmaking will gain deeper understanding and appreciation of peers' experiences and knowledge and integrate these into the process. Grantmakers also must realize that there may not always be easy solutions to challenges when they emerge. What's important is acknowledging and then taking steps to address them honestly.

These commonly cited challenges are:

- ◆ Participatory grantmaking can be resource intensive.
- ◆ Participatory grantmaking can involve safety and security risks.
- ◆ Participatory grantmaking can sometimes result in conflicts of interest.
- ◆ It can be difficult to ensure representativeness.
- ◆ Participatory grantmaking doesn't eliminate the potential for bias.
- ◆ Decisions made through a participatory grantmaking process may differ from what the grantmaking institution wants.

- ◆ The community's participation may be taken for granted.
- ◆ Participatory grantmaking can be difficult to measure.
- ◆ Participatory grantmaking may not be right for all funders.

## PARTICIPATORY GRANTMAKING CAN BE RESOURCE INTENSIVE.

Participatory grantmakers acknowledge that these processes tend to be more time intensive and, in some cases, costlier than more traditional grantmaking approaches. "This took much more staff time than we expected," Erica Lim of the Arcus Foundation notes. "Participants are volunteers so it's difficult to schedule meetings and get people there on time. Coordination can be difficult. Internally, it puts more burden on our program team who administered the process."

*"Tough issues and questions will come up in this process, especially about power, and this isn't a bad thing. It's just part of doing the work this way."*

– ALLISON JOHNSON HEIST

Time is another issue that affects peers' ability to participate—something that grantmakers forget. "The most challenging thing for me was simply being able to set aside enough time for participating," Angela Butel, a peer grantmaker



with Headwaters Foundation for Justice, says. “I wanted to make very thoughtful contributions to the process, so I had to say ‘no’ to some things in order to carve out enough time among my other responsibilities.” Funders need to acknowledge that peers juggle participatory grantmaking responsibilities with others in their professional and personal lives.

***“While it may be more costly to have lots of people making these decisions versus one person at a desk, we’ve found that the people who participate in this process add a lot of value to our work.”***

– NADIA VAN DER LINDE

Other costs can include translating materials into different languages, setting up and monitoring online proposal application and review processes, paying for trained facilitators, and securing appropriate meeting space, food, and time, and/or covering travel expenses for peer convenings. Translating grant applications, for example, can range from \$600 to \$12,000. Creating a website able to handle all aspects of the application process can cost thousands more.

Participatory grantmakers argue that the benefits of this process far outweigh any added costs. Some say that grant decisions that are uninformed by people on the ground are more likely to fail and, in turn, waste time and money. Others justify the added costs as critical to making better grants.

Participatory grantmakers also see these line items as baked into a process that provides a wide range of resources, not just money, but funders wanting to do participatory grantmaking may see them as deterrents. That would be a missed opportunity, Diana Samarasan says, because “it actually costs less to build this approach into programs during the design phase than retrofitting it into an entrenched program or institutional system, which can be expensive and time consuming.”

Some participatory grantmakers take issue with using traditional cost-benefit analyses like these altogether because they focus on efficiency rather than efficacy. “Yes, it can be expensive to consult with and involve people in decision making,” says Mutisya Leonard of UHAI EASHRI. “But this critique doesn’t consider the outcomes and impact of this process as part of a cost-benefit equation. For example, we’ve seen that our process builds more trust among peers. Where does that fit in the usual cost-benefit analysis? Nadia van der Linde agrees: “While it may be more costly to have lots of people making these decisions versus one person at a desk, we’ve found that the people who participate in this process add a lot of value to our work. That’s a benefit that needs to be integrated into the cost-benefit equation.”

Rather than argue about the cost-benefit of participatory grantmaking, Chris Cardona of the Ford Foundation suggests a better question might be what the costs of not doing participatory approaches are. “If foundations were in closer touch with peers from the beginning and had relationships of mutual responsibility and accountability, would we need to pay for expensive strategy and evaluation processes? Or would we instead have strategy and insight partners all along the way that would in fact save us money in the long run?”

### **PARTICIPATORY GRANTMAKING CAN INVOLVE SAFETY AND SECURITY RISKS.**

While openness and transparency in the process are widely touted as benefits of participatory grantmaking, there are situations where this aspect may put participants in danger. For example, it’s important that all grantmaking panelists for the International Trans Fund are trans-identified, but this transparency can leave people in the trans community more visible, which can be dangerous for some, says Broden Giambro.

Nadia van der Linde of the Red Umbrella Fund, which focuses on sex workers, advises colleagues to be careful to not “out” anyone because it could lead to targeted violence motivated by hateful

attitudes or state laws. “If funders haven’t thought about this, they could have someone on their peer review panel or board inadvertently put in a dangerous situation.” This means that what happens as part of the grantmaking process—including who is there—needs to stay in the room.

There are also political contexts to consider, says Erica Lim of the Arcus Foundation. “In Russia, where we funded, the context is very hostile due to the anti-LGBT propaganda and foreign agent laws, so it’s much harder to get money to activists there and even more challenging when you’re trying to use a participatory approach because safety is a concern.” The rapid-response grantmaker Urgent Action Fund has had a similar experience, says Caitlin Stanton. “The bulk of our requests are from international groups engaging in efforts that could put them in extreme danger if their identities were made public. These kinds of security concerns are one reason you wouldn’t want to adopt a participatory approach at the grant-level decision, so you try other ways of engaging people like reviewing grants that have been made, suggesting modifications to strategy, identifying priority issue areas, and conducting outreach.”

### **PARTICIPATORY GRANTMAKING CAN SOMETIMES RESULT IN CONFLICTS OF INTEREST.**

As with most funding processes, but especially because participatory grantmaking directly involves the people most affected by and working on the issues being discussed, conflicts of interest crop up. An example of this, says Nadia van der Linde of the Red Umbrella Fund, is when participants on their review committees start advocating for more funding to go to their regions or communities. “These conversations can be very hard. We try to be really transparent about what’s going on, though, and encourage peers to challenge each other if they think someone’s trying to inappropriately direct funds toward their particular interests.”

Similar to traditional grantmaking, there’s no single way to “handle” these kinds of complex relationships. One approach used by both

traditional and participatory grantmakers is to ask every grantmaker to fill out a form stating organizational affiliations or other potential conflicts. If a reviewer has connections to the people or organization applying, they may recuse themselves from discussions or voting on that grant.

***“People aren’t blank slates—their knowledge, experiences, and relationships can contribute to more candid discussions.”***

– ALLISON JOHNSON HEIST

Another strategy is to simply accept that this process—like any that have a more diverse set of participants, all with their own networks and relationships—will have more potential for conflicts of interest, but that this isn’t necessarily a bad thing. Instead, it can be an opportunity to use those relationships—and the knowledge that comes with them—as part of the process.

The Headwaters approach captures aspects of both strategies because “conflicts of interests are never as straightforward as they may appear,” notes Allison Johnson Heist. To surface more nuanced conflicts of interest, Headwaters has in-person, one-on-one conversations with people to see if they have any bias that would prevent them from being impartial decision makers. At the same time, Heist realizes that people aren’t blank slates, and that their knowledge, experiences, and relationships can contribute to more candid discussions.

Moukhtar Kocache of Rawa Fund adds: “We’ve been so traumatized in philanthropy to develop artificial methods of transparency and accountability to the point where we’ve removed a very important factor essential to healthy dynamic social relationships: personal, intimate knowledge and agency, and individual visions. In traditional philanthropy, if I knew a group that was applying for a grant, I’d have to step out of the decision. But doesn’t that castrate the personal and social capital that can be really important in making decisions about who’s interesting to support?”

Overall, participatory grantmakers agree that figuring out what is a true conflict of interest is an art, not a science. It is recommended that all funders—participatory or not—acknowledge conflicts of interest and think about how they can be assets, rather than barriers, to the decision-making process when given proper space to be expressed and navigated.

### **IT CAN BE DIFFICULT TO ENSURE REPRESENTATIVENESS.**

Putting together decision-making committees that are sufficiently representative of a movement or community isn't easy—even for those who have been doing this for a long time. Research about participatory practices more broadly shows that one of the most important factors in successful processes is being proactive and intentional about involving people from all parts of the community or constituency—not just those who may be more inclined to participate or are automatically invited because of their titles, financial status, or social capital.

***“I worry about authenticity in these efforts and whether we're really hearing the voice of people, especially those who don't have a voice.”***

– CECILIA CLARKE

In short, if you build it, they will not necessarily come.

That's why it's important to take the time to create thoughtful and comprehensive outreach plans aimed at making contact with people representing every possible constituency that will be affected by what's decided. Some funders, for example, map the different kinds of networks potential participants may belong to—and whom they know in each—to help ensure that they hear about the process from (or are approached by) people they already know and trust.<sup>5</sup> Some foundations then ask those networks to help them reach out to potential participants.

Osgood, a peer grantmaker with Maine Initiatives, points out that intentionality about involving people who represent all parts of a community not only improves the process but helps establish trust among participants, as well as those who weren't invited but have a stake in the decisions that are made. “Maine Initiatives started by doing a lot of conversations when they were thinking about what they wanted to fund. They got into different corners of the community to find out what people said were priorities, especially in racial justice and environmental matters. I participated in one of these meetings, and it was great. There was excellent facilitation, and they were very open to people's feedback. That made me feel invested right from the start, so I felt really good about joining the grantmaking committee.”

Just because there is representativeness, however, doesn't mean it's authentic. “Despite our best intentions to get residents around the table, we just don't know how much it really is resident-led,” Cecilia Clarke of the Brooklyn Community Foundation observes. “I worry about authenticity in these efforts and whether we're really hearing the voice of people, especially those who don't have a voice.”

Clarke and others stress the importance of creating spaces and conversations that are safe and accessible for a diverse group of participants. As noted above, this requires care and attention to a range of ways in which participants can differ—not only demographically but also in temperament, experience, and political orientation—and ensuring that debate occurs in an environment of mutual respect and equitable participation. Often, to be representative and promote authentic participation, language and accessibility accommodations must be addressed. “If you want to be accessible, you have to make the effort,” Nadia van der Linde notes. “Involving people who speak different languages has helped build the movement and gain their trust. That's important because if you don't have that trust, they'll turn against you.”

## **PARTICIPATORY GRANTMAKING DOESN'T ELIMINATE THE POTENTIAL FOR BIAS.**

Just because something is participatory, it doesn't mean it's bias free. All participants can have racial, ethnic, gender, age, and other kinds of biases that are often difficult to address openly and honestly. But naming them is critical, says Caitlin Stanton of the Urgent Action Fund, because "we still live in a society of sexism and discrimination, which are internalized and perpetuated unconsciously in the ways we work in our institutions. So, we need to be constantly figuring out concrete ways we're reducing opportunities for bias in participatory grantmaking."

### **IN THEIR WORDS: MAKING GROUP DECISIONS IS DIFFICULT**

**Peers can also be anxious about making the right call as to which organization receives funding.**

Vince Wong, working with the Los Angeles-based Liberty Hill Foundation, says that this was one of the biggest challenges he faced as a peer grantmaker. "There were so many deserving organizations and limited potential grant dollars available. It was especially difficult trying to provide recommendations for such a diverse set of potential grantees who are all deserving and fill intersectional spaces across the movement."

Kali Hough, a peer with The New York Women's Foundation, describes the challenge of prioritizing who receives funding: "Among our cohort of 15 girls, determining need was difficult because all the issues seemed equally urgent. Also, each fellow came to this program with different backgrounds and passions that inadvertently affected how the grantmaking process went and also which issues were important. For example, I care a lot about body image and fostering healthy perceptions of beauty around young women because of my personal experience with an eating disorder; however, other girls were really invested in depression among girls and the gender-nonconforming community. We all agreed upon their mutual importance, but when it boiled down to the decision making, we had to put ourselves in each other's shoes and examine what was going to make the largest impact on the respective community."

Stanton has observed that while participation can and should cast a wide net, "it still tends to reflect majority opinions rather than causes that still aren't well understood, like minority rights issues." Osgood, a peer grantmaker with Maine Initiatives, says that dealing with bias requires making sure there are different perspectives at the table but admits this can be challenging. The first year of Maine Initiatives' participatory grantmaking program, there was a "leaning toward immigrant/refugee-led groups, and there weren't any African American groups because we had an implicit bias of what we wanted to support at that time. The second year, we overcorrected, which led to no immigrant organizations being funded, so we're continuing to try and find a balance."

Some funds have tried to overcome this bias by simply inviting potential participants who "check off all the boxes." While strengthening panel composition is a good goal, it will not simply "fix" bias challenges without recalibrating group trust and dynamics. What does work, says Dennis van Wanrooij, formerly with the Red Umbrella Fund, is making sure there is sufficient diversity on peer review and decision-making panels so that group members feel freer to call out other members about potential biases during meetings. He says he's seen that happen during their meetings, and it's been a positive experience but requires a lot of mutual trust.

***"All participants can have racial, ethnic, gender, age, and other kinds of biases that are often difficult to address openly and honestly. But naming them is critical."***

– CAITLIN STANTON

Given the likelihood for bias to materialize, it's essential for staff overseeing a participatory process to ensure that people feel safe, understood, and respected. That doesn't mean everyone needs to agree; participants just need assurance that their concerns and views will be "heard" and appreciated, rather than dismissed as irrelevant or "biased."

## DECISIONS MADE THROUGH A PARTICIPATORY GRANTMAKING PROCESS MAY DIFFER FROM WHAT THE GRANTMAKING INSTITUTION WANTS.

While some organizations are exclusively dedicated to participatory grantmaking, others are part of larger institutions and/or answer to a board or other oversight body that may disagree with recommendations made via a participatory process. Some funders say it just comes with the territory. “We’re clear that grant decisions rest with our volunteers,” Allison Johnson Heist of Headwaters Foundation for Justice says. “But there’ve been times that a discussion has snowballed and led to an outcome that I wouldn’t have come to myself. It’s hard, but that’s one of the challenges we know is part of this approach and have to accept.”

*“Perhaps the biggest mistake funders who are doing participatory grantmaking can make is initiating these processes but then ignoring what people are telling you.”*

– ANA L. OLIVEIRA

Heist and her colleague Melissa Rudnick say that what matters is that funders are clear about who the final arbiters of grant decisions are—from the start. “We say to our peer members right up front: ‘Every dollar that goes out of this foundation’s door has to be approved by our board of directors.’ We do this because we’ve found that while peers are happy to be an advisor versus the final decision maker, they want clarity about their role.” That goes for the board as well.

Perhaps the biggest mistake funders who are doing participatory grantmaking can make is “initiating these processes but then ignoring what people are telling you,” Ana L. Oliveira of The New York Women’s Foundation observes. “You can’t disregard what you’ve asked for and not expect negative consequences.” While group decisions aren’t always what funders might expect, those decisions are important to honor. Otherwise,

participants may feel that their time and insights are devalued, leading to a lack of trust, as well as cynicism about the efficacy of these kinds of processes. And, for foundations, trumping a decision undercuts the ethos of shifting power that they signed on to, which risks creating loopholes in the approach that could lead to its failure.

## THE COMMUNITY’S PARTICIPATION MAY BE TAKEN FOR GRANTED.

Funders are often criticized for asking people for their time or ideas free of charge—a practice that can also occur in participatory processes. The Urgent Action Fund, says Caitlin Stanton, “relies on people giving their expertise and ideas and time in those processes, and often they’re only compensated by the potential that they might get a grant. Is it time to think more formally about how we value and compensate nonprofit workers and activists for their time?” Melissa Rudnick from Headwaters Foundation for Justice agrees. “A question that grantmakers don’t ask enough is what are we offering to the communities we’re inviting to the process? We need to be offering something more meaningful to community than ‘this is a good idea.’”

Osgood, a peer grantmaker with Maine Initiatives, suggests participatory grantmaking start with community conversations that invite residents into the process immediately. That builds trust, they say, which means “people are more likely to be honest and feel safe about saying ‘the process isn’t working.’ And that their feedback is taken seriously.” It’s not enough, they add, to open the process to the community; you have to make it accessible to them. “That means taking a hard look at how questions are worded, how outreach is done, and whether everyone has the resources to prepare grant proposals. And, most of all, it means giving stipends or allowing committee members to bring their families to retreats or meetings.”

Another peer, Karina de Sousa, with The New York Women’s Foundation, agrees: “Participatory grantmaking is a very time- and thought-intensive process, so it can be challenging to carve out the space and time needed to fulfill the responsibility.

I was lucky to have the support of my organization, but other volunteers can have a difficult time balancing their participatory grantmaking responsibilities with professional and personal responsibilities.”

***“A question that grantmakers don’t ask enough is what are we offering to the communities we’re inviting to the process?”***

– MELISSA RUDNICK

### **PARTICIPATORY GRANTMAKING CAN BE DIFFICULT TO MEASURE.**

For many participatory grantmakers, the approach rests on the assumption that involving peers in decisions about grants and the criteria by which those are made will result in more optimal outcomes and/or effective philanthropic investments. Participatory grantmaking also has the potential to result in positive outcomes for participants by strengthening their leadership, networking, and strategic skills, which are rarely considered in more traditional research paradigms. This theory of change continues to be largely untested, however, because it requires evaluating something that’s iterative, process-oriented, and relational, making it difficult to codify.

It’s important to note that these issues aren’t exclusive to philanthropy but have cropped up in many other participatory fields. The difference is that the latter have been trying to find ways to address them through more rigorously designed studies. For example, there have been several studies showing that participatory deliberative democracy experiments help strengthen the capacities of the marginalized groups.<sup>6</sup> These data, however, haven’t yet seeped into philanthropy as justification for supporting more participatory efforts.<sup>7</sup>

Many participatory grantmakers, including Mutisya Leonard, think it would be helpful to have more research about participatory grantmaking. “Not only would it persuade mainstream philanthropy

of participatory grantmaking’s efficacy, but it would also help participatory grantmakers appreciate and clarify their values.”

On the other hand, he points out that “mainstream philanthropy isn’t being asked to prove that what they do works—so why should this burden be placed on participatory grantmakers?” Chris Cardona of the Ford Foundation agrees: “You can’t compare the impact and effectiveness of internally-driven versus participatory approaches because foundations don’t talk enough about their own impact and how they judge that.”

While there is still important debate about the role of data and measurement in philanthropy—not just with participatory approaches—the reality is that funders are still asking for hard evidence showing that their investments will have impact. Without it, anecdotes and advocacy aimed at embedding participatory approaches—and their emphasis on diversity, equity, and inclusion—will probably fall short in persuading foundations of their efficacy. Read more in our chapter on evaluation on [page 45](#).

### **PARTICIPATORY GRANTMAKING MAY NOT BE RIGHT FOR ALL FUNDERS.**

Some participatory grantmakers believe this approach isn’t necessarily appropriate for all funders or in all circumstances. National funders, Sergey Votyagov of the Robert Carr Fund says, may find it particularly challenging because they are more removed from work on the ground and tend to have entrenched bureaucracies that are difficult to disassemble and reconstruct in ways that will facilitate participatory grantmaking, as opposed to those just starting from scratch. They may also be funding multiple constituencies that may not all benefit from such an approach.

Some traditional funders aren’t convinced that foundations should cede control over funding decisions because they’re still fiscally and legally responsible for those decisions. As Chris Barr of the Knight Foundation notes: “When it comes to decision making, our board and staff have a

responsibility to make sure that the grants we make align with the mission of the organization, which isn't always going to mesh with a participatory grantmaking process. The staff has legal and fiduciary responsibility for overseeing where the funds are going." That doesn't mean the foundation can't incorporate a participatory process, he adds. "We are deeply committed to making sure there are a variety of voices—including community residents and field experts—in informing our decision-making processes."

Clearly, there are challenges in undertaking participatory grantmaking, and because this is a nuanced process that involves a wide range of people, there are no cookie-cutter solutions. Every participatory grantmaking initiative and its context is different, so the ways in which problems or issues are addressed will be different. What's important is understanding that wrestling with these matters is an essential part of the process, and that not all challenges are going to be resolved. Rather, funders should create the space to acknowledge, understand, and discuss challenges when they arise—and as openly, honestly, and respectfully as possible, so that participants feel validated and empowered to move forward in spite of them.

## DISCUSSION QUESTIONS

- ◆ Have you experienced any of these challenges in your own participatory grantmaking efforts? In grantmaking in general?
- ◆ How did you resolve these challenges?
- ◆ Did you have challenges you couldn't resolve—or haven't yet resolved? Which and why?
- ◆ How might the technology that supports your process decrease or emphasize some of these challenges?

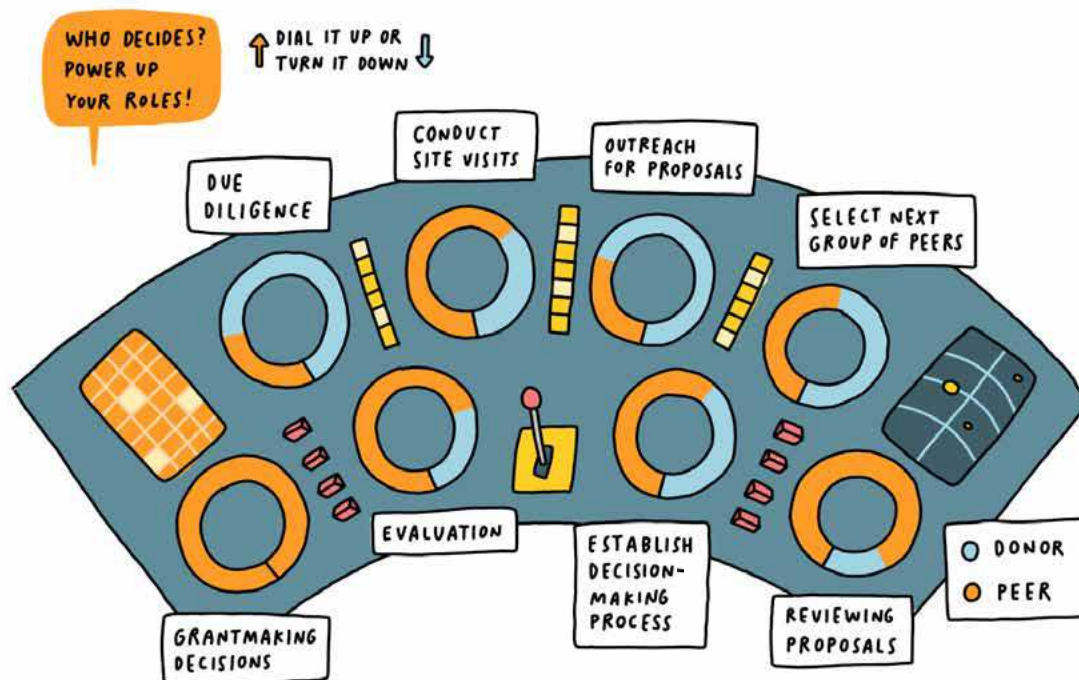
# Who Decides and How?

Participatory grantmaking's most fundamental premise is that everyone who participates is an equal partner—and has power—in decision making. How this manifests in actual practice varies. Like a lot in philanthropy, "it depends."

Some funds like the International Trans Fund are completely peer-led in that everyone making funding decisions is a member of the population or community the fund supports. The fund's grantmaking panel does not include any paid staff or trustees from the foundation itself. "Our fund recognizes that donors have a vested stake, knowledge, and experience to help influence what we support," Broden Giambone says, "but when it comes to where the money should go, we believe that our grantmaking panel should be led by peers to ensure that these voices have the primacy

and that grant decisions aren't being dictated by external factors." Donors still benefit from the process, he says. "They get an education about the issues directly from activists, a real sense of what the community looks like, and the lay of the land on a global scale. That deep familiarity with the work enhances donors' ability to talk with other donors about it."

Other funds are peer-led when it comes to grantmaking, but donors and staff play a role in other parts of the process. At the Headwaters



THERE ARE MANY COMBINATIONS OF DONOR AND PEER ROLES AND RESPONSIBILITIES. FIND THE RIGHT BALANCE THAT WILL WORK FOR YOUR CONTEXT AND MAKE YOUR PARTICIPATORY GRANTMAKING SHIP FLY!



Foundation for Justice, for example, peers make all grant recommendations, but staff present information and facilitate discussion. “We’re not part of the actual voting,” Melissa Rudnick says, “but if the committee has questions about a grantee we’ve funded before, we can provide that background for them. We try to bring information to the process in a way that doesn’t tip the scales.” Headwaters’ board has final say over peers’ recommendations, but during the 30 years the fund has been using a participatory approach, there has never been a grant that’s been turned down. “Our board honors the panel’s decisions 100 percent,” Allison Johnson Heist says, “because they believe these are the right people to make those decisions.”

The Liberty Hill Foundation started out with a peer decision-making structure, but, over time, the committee decided to have the staff make the final decisions and distribute the grants. Nitpicking over budget parameters was grueling for peers, so finding a comfortable alternative was in everyone’s best interest. Now, peers inform who should receive money and trust that decisions at the staff level will reflect their perspectives and recommendations.

Some participatory grantmaking involves both peers and donors in reviewing, selecting, and making grant decisions. The Disability Rights Fund’s donors sit on its grantmaking committee along with activists with disabilities and share grant decision-making responsibilities, which allows for two-way learning. Diana Samarasan says DRF is constantly thinking how to improve this flattened structure, especially helping donors step aside and letting peers make decisions, facilitating relationships, and ensuring that activists are able to assume leadership roles.

An important component of the participatory grantmaking process that can sometimes be overlooked is whether and how peers will be involved in stipulating the criteria or guidelines for grantmaking decisions. In the Case Foundation’s national participatory grantmaking initiative,

says Kari Saratofsky, former vice president for innovation at the foundation, “non-grantmakers created the proposal assessment criteria, they reviewed and whittled down thousands of submissions, and then, with staff and colleagues in the field, pulled together a final list of candidates. That’s very different from the foundation deciding what it wanted to fund, creating a list of nonprofits it liked, and then asking the public to vote on them.”

***“When youth are responsible for the grantmaking, they become more confident and often become leaders in the community.”***

– MARIAM KOBALIA

Other funders take more control over criteria setting because, one grantmaker says, “consistency is important to us. We’re very up front with the peer grantmaking committee before they join that we have established criteria that’s part of our process. People who are uncomfortable with that then are able to make a more informed decision about whether they want to be a member of the committee.”

In the 25 YouthBank networks worldwide, young people are in charge of all due diligence, as well as making grant decisions for peer-proposed projects in their communities, while adults help coordinate and provide assistance with the overall management of the initiatives. In the Republic of Georgia, for example, there are YouthBank chapters in 25 of the most marginalized communities, where young people have full grantmaking responsibility. According to Mariam Kobalia of the Europe Foundation, which oversees the program, “we have found that when the youth are responsible for the grantmaking, they become more confident and involved. Our experience shows that after the program, they maintain or increase their involvement, often becoming leaders in the community.”<sup>8</sup>

## WHAT SHOULD DONORS' ROLE BE IN THESE PROCESSES: ACKNOWLEDGING POWER AND PRIVILEGE

At a convening of several donors and activists who were designing a new participatory grantmaking fund—now known as FundAction—things were going great. The group nailed down its grantmaking priorities, criteria, and decision-making processes with relatively little disagreement except for one major sticking point: whether donors would be members of the committee making grant decisions. Some felt that donors should have a vote—or at least a voice—in the decision-making process, but others were adamantly opposed, claiming that even having one donor on a decision-making committee would “change the conversation” and mitigate an “authentic participatory process.”

Ultimately, the group decided that decisions would be coordinated by a facilitation group comprising seven activists and one donor representative from across Europe. The donor’s role is consultative, however, with no voting power.

Dealing with power imbalances between donors and recipients has long been one of the most contentious issues in philanthropy, but it’s particularly salient in participatory grantmaking, where the core ethos is ceding power to those who haven’t been given the agency to wield it. And in the world of philanthropy, money is power.

Nim Ralph from EDGE Funders Alliance believes that the process of grantmaking itself releases power. “That’s different from what traditional

## WHO DECIDES WHO DECIDES?

Whatever structure is used, participatory funds have to start somewhere with putting together the review, selection, and governance/board committees. Who decides who will participate on these?

Some participatory grantmakers’ development is organic. Terry Odendahl points to Global Greengrants Fund as a fund that emerged directly out of the environmental movement. “A few of us activists came together with some donors to establish a participatory fund that would support these issues. So, in the beginning, we were the decision-making committees.” Over time, the fund moved to a process in which members are recommended by former and current grantees, advisory panels, and/or board members.

The International Trans Fund used an interim steering committee to recruit and select permanent members of the steering committee and grantmaking panel. Now that there’s a permanent steering committee in place, this body selects the grantmaking panel. For other foundations like the Durfee Foundation, past grant recipients are invited back to the grantmaking process as grant reviewers each year.

Katy Love from the Wikimedia Foundation uses a mix of election and selection to build a diverse and representative body. “We had an event where the board and staff members of various organizations came together, which turned out to be a good way of attracting and recruiting people interested in being members of our volunteer grantmaking committee.” Many of those people then nominated themselves in a community-wide election, where they submit applications, they answer questions, and thousands of people vote.

Wikimedia found, however, that wide-scale, public election wasn’t necessarily the best way to build these committees because they often ended up with little diversity—across geography, language, gender, and other areas. So they designed a process in which the foundation is involved in selecting committee members. Love notes, “when you just have an election process, you may not get as much diversity in your applicants as you’d like to see. We saw that most of the people winning the election came from Western Europe and were men.”

For some, the composition of the peer decision-making panel is by complete chance. School-based youth grantmaking models like Youth and Philanthropy Initiative (YPI) are often not structured as “opt in” or “opt out”; students are just expected to participate. “I have been teaching for 30 years and I have never seen a project work so effectively across an entire grade that empowers youth to gain skills for their future and at the same time promotes empathy and caring,” shares Marilyn Nunn, a teacher who embedded the YPI grantmaking model and learning objectives into her classroom.

philanthropy does, which holds onto as much power as it can in the decision-making process. Look at who funders are traditionally: they're the global elite; they're white; they're men; they're straight; they're all of these things. These are the people who hold power globally and, in turn, the money."

That's why some participatory grantmakers see donors' involvement in grant decisions as antithetical to the goal of shifting power into the hands of people most affected by that power. They have found that the mere presence of donors in grantmaking discussions can have a quelling effect on the potential for peers to have honest conversations in a safe space. "As soon as you have a donor sitting at the table, it immediately changes the dynamic," one peer grantmaker observes. "Some people feel like they can't say what they really think, especially if they're representing an organization that's supported by those donors. Others start shining for the funders, hoping to get their attention. And donors sometimes throw their weight around, which upends any hope of an authentic participatory process."

***"I think participatory grantmakers do a disservice to the process when they make donors and staff go out of the room because it can result in misunderstandings rather than collaboration."***

– SERGEY VOTYAGOV

It's also important to remember that while foundation staff aren't (usually) donors, per se, they are still representing donors and, as a result, have referent power that can lead to the same kinds of issues described above. Allison Johnson Heist of the Headwaters Foundation for Justice emphasizes the importance of being clear about foundation staff members' role in these processes. "We're in the room as staff, but we see our role as facilitative. That often takes the form of answering historical questions committee members have about previous grants. We can provide that information,

and we're ok with doing that—not being part of the voting—because it doesn't tip the scales."

Some participatory grantmakers, however, believe that leaving donors out of the grantmaking process is short-sighted and the antithesis of participatory. Sergey Votyagov of the Robert Carr Fund notes that while it's true that those who seek out and those who hold the resources are two sides, there's value to dialogue and participation that comes from both the communities and the donors. "Donors are more than their money; they're part of the community, and they have their own life experiences. You miss something when you just think of them as a check. I think participatory grantmakers do a disservice to the process when they make donors and staff go out of the room because it can result in misunderstandings rather than collaboration." Many staff and donors who use participatory grantmaking agree and share that they consider themselves members of the community, too, though their paid position places them in a different position than peers.

Kindle Project has found that excluding donors from these conversations neither heals nor helps. Sadaf Rassoul Cameron believes donors have wisdom and a story to bring to the table. "I think that we need to explore this. Cutting donors out of the process simply because they have wealth isn't mutually empowering or transformative. Handing over money can sometimes miss the opportunity to build the deep relationships that are necessary to bring power back to balance."

Moreover, donors themselves acknowledge how their own position can sometimes impede how honest they'd like to be during these meetings. Jo Lum, development officer with Headwaters Foundation for Justice, says that one of the biggest challenges Jo faced as a donor in a participatory grantmaking process was figuring out "how much to share as a person in the room with privilege."

To Cecilia Clarke of the Brooklyn Community Foundation, it's essential to figure out how donors can support the participatory process but not influence it—a balance that is critical. One way

that they have tried to deal with this is by using consultants, rather than foundation staff, to facilitate the community grants process they use.

One of the main findings of an evaluation of the Case Foundation's participatory grants initiative was that the best decisions and ideas emerge when both credentialed experts and lived experience experts, or "real people," are involved in exploring them. Recognizing that grant decisions voted on by the public can become popularity contests, the foundation brought in a small group of advisors with experience in community building to help cull the list of finalists selected by non-grantmakers. Those proposals were then put forward to the public, who selected the final grantees. This mid-level culling allowed the foundation to balance non-grantmakers' creativity and decision making with input from experts—a process that resulted in the public making the final decisions about ultimate recipients.<sup>9</sup>

Power can also be relative. At a recent meeting held by a grantmaker with a group of diverse stakeholders, participants talked about their perceptions of who has power and who doesn't. "Some of the people at the table were pretty high-level decision makers who probably were perceived by many of the community groups that were there as really powerful. But when these people pointed out that they had little power in their own agencies, it shifted the whole dynamic because it acknowledged that power can be contextual."

In short, participatory grantmakers recognize that power can take many forms—not just money. "Yes, donors have the power of money, but communities have different kinds of power. The communities build the movement, serve as the leadership, mobilize mass action, and coordinate advocacy. That's all power, the power of the masses. We need to honor this power," says Sergey Votyagov.

So, what should the role of donors—and others with power—be in participatory grantmaking? Allison Johnson Heist of the Headwaters Foundation for Justice recommends that, before decisions are made about donors' role in

participatory grantmaking, there need to be hard questions asked about the intention of the effort. "If you're doing a panel with both donors and peers, is it because your board isn't ready to turn over the reins? Or is it because you see the value of having all community members—including donors—at the table? Understanding this matters more than what mix you end up with. It's about what you see as a value-add to this process."

As with everything, context matters. What works with the community you're engaging with? How are you thinking about who holds power and how that power is advancing equity and your mission? And what kind of power is at play—beyond money? Do the roles for donors, staff, and peers reflect a participatory ethos? Participatory grantmakers emphasize that everyone should be adding value to the process in their role, whether staff and/or donor, and that these considerations should drive whether and how donors are involved.

## DISCUSSION QUESTIONS

- ◆ If you're just getting started, how will you create a process that is equitable in terms of who serves on the initial decision-making bodies? If you're a more established initiative, who made decisions about the members of your initial committees? And has that system changed over time?
- ◆ Who will (or does) participate in your participatory grantmaking peer-review panels? Selection committees? Grant decision-making committees?
- ◆ How will various stakeholders participate in these activities and what structures will you use to ensure they have an equal and authentic opportunity to participate?
- ◆ Will donors participate in any of these? If so, which ones and why?
- ◆ How much power or control will donors have over final decisions?
- ◆ If they will be involved, how will you address power imbalances that may arise during the process?

# The Mechanics

There are a wide range of options to consider when choosing a participatory grantmaking structure. As with much of philanthropy, no two foundations look exactly the same, but foundations that have been doing this for years offer a range of templates off which new participatory grantmakers can model their practices.

The examples below are just a few snapshots that span various geographies, populations, sizes, and processes:

**YouthBank International** has more than 200 chapters in 32 countries. Each of its locally based programs is entirely led by youth peers, who make grants using a collaborative process. They conduct community needs assessments and engage in a consensus-driven model facilitated by an adult leader—often from a donor foundation or local NGO—whose role is to provide a structure where all voices are heard and support the logistics of gathering young people together.

**International Trans Fund** has a 12-member steering committee, of which two are donors, that oversees governance and strategy direction. Its 12-member grantmaking panel is made up of trans activists from all over the world who convene annually to make decisions about grants. The Fund also has a secretariat and a small staff to manage the overall process.

**UHAI EASHRI's** grants committee is entirely peer-led by activists from the East Africa/regions its supports. Every three years, UHAI does a strategic plan and asks activists in the field to give feedback. Grantmaking is overseen by staff and supervised by a board whose members are all recruited from the LGBTQ/sex worker community (self-identified or “sympathetic.”) This board approves and monitors the strategic plan and makes sure UHAI stays true to its vision. It also meets annually to approve the plan and budget.

**Red Umbrella Fund's** international steering committee—which has financial oversight, does strategic planning, and establishes grant priorities—are all sex workers except for three seats that are reserved for donors. One of those donors is for the Fund's host organization (Mama Cash) and two others. This committee also selects members of the global peer-review panel (the program advisory committee), which is at least 80 percent peers and the rest allies of the sex worker movement who have support from a sex worker organization.

**Headwaters Foundation for Justice** places community leaders at the center of its grantmaking process, but its board has final approval of a peer-led panel's recommendations. Headwaters recruits and interviews potential peer grantmaking committee members, focusing on people of color, as well as a mix of age, demographics, class, gender, sexuality, etc. Committee members review all applications, offer feedback, and receive training in assessing proposals based on a set of grant criteria. Peers have a month and a half to score and rank submissions and then reconvene to make final decisions. Their recommendations are presented to the foundation's board, which includes members who came up through this process.

**Global Greengrants Fund** has 22 regional advisory boards around the world whose members are environmental and social justice activists. Each advisory board has a coordinator and administrator, both of whom are local activists;

develops its own policies (e.g., how many times the board will meet, make grants, etc.) and strategies; and manages its own budget. Global Greengrants' headquarters leads fundraising efforts, conducts due diligence, and oversees the administrative parts of the work. The Fund also has a governing board that includes former advisors, donors, and activists who are responsible for hiring the executive director; strategic planning; organizational policy; and the overall budget.

**Dalia Association**, which supports community-led development in Palestine, brings together people in communities to identify and mobilize local resources for local or regional projects of their choice. There is no formal application

process; instead, Dalia staff works with community leaders to create relationships with residents, who are invited to open meetings and learn about community philanthropy. Residents are encouraged to present their ideas for funding, and the community votes on which projects they think will best meet their needs. Dalia also provides ongoing capacity-building assistance to grantees.

We have included two extended examples of how existing participatory grantmakers think about their purpose, application process, vetting, priority-setting, types of grants, participants, reporting, and general structure. Check some out on [page 40](#) and visit [GrantCraft's website](#) to find more.

*Continued on page 44*

## TYPES OF PARTICIPATORY GRANTS

**General Support.** The Red Umbrella Fund provides core funding that is flexible to the needs of each group and that can be used for any kind of expense (e.g., rent, salaries, training, capacity building, networking activities, etc.).

**Project Support.** Through its Neighborhood Strength program, Brooklyn Community Foundation engages neighborhood stakeholders to identify local challenges and opportunities, determine the focus of the foundation's investment, and select projects for funding through a competitive RFP. In 2017, the advisory council selected five projects supporting inclusive public spaces, the long-term investment area determined by residents.

**Capacity- or Field-Building/Networking** (funds for organizational development, training, technical assistance, research, etc.). The New York Women's Foundation provides capacity-building support for their grantee partners to obtain one-on-one consulting services and cohort learning opportunities in organizational development, leadership development, program sustainability and innovation, and advancing gender and racial equity.

**Collaborative/Long-Term Initiatives** (funds to strengthen community partnerships or collaborative initiatives engaged in long-term or more complex work, e.g., policy reform, litigation, etc.). The Disability Rights Advocacy Fund supports Disabled Persons' Organizations' participation in advocacy efforts around legislative change addressing the rights of persons with disabilities. DRAF collaborates with the Disability Rights Fund (DRAF), a pooled fund combining the resources of multiple donors to support advocacy of especially marginalized groups of persons with disabilities.

**Individuals.** Kindle Project supports individuals through several grantmaking and award programs such as Makers Muse, which provides support to artists to uplift their work in the various stages of their creative process. Recipients are then given the chance to recommend funding for an organization of their choice through Kindle's Boomerang Flow Funding Program.

**Rapid Response** (small grants for individuals and/or groups that allow them to react quickly to recent political developments and unforeseen events). The Third Wave Fund provides urgent response funding to groups led by young people of color in low-income communities who are countering gender and reproductive injustice. The Urgent Action Fund provides grants to women's and trans human rights defenders in the Middle East, Europe, and North America. Each of these entities comprises activists from their regions who determine grantmaking priorities and strategies.

## TOOL: QUESTIONS TO GUIDE CONVERSATIONS ABOUT STRUCTURE

### DEFINE PURPOSE

- ◆ What is the purpose of using a participatory grantmaking approach (e.g., build/strengthen a field or movement, surface issues or trends, empower peers/constituents, leadership development, capacity building, get more informed results, new ideas/innovation, general support, etc.)?
- ◆ How will you define success?

### APPLICATION PROCESS

- ◆ Who is eligible (individuals and/or organizations)? Open, Letter of Interest (LOI), or invitation only? If “invitation only,” who decides to whom the invitation is extended?
- ◆ How often? (rolling, times per year, etc.)
- ◆ Can applicants get assistance in applying? If so, what kind and by whom?

### INITIAL VETTING/SCREENING/DUE DILIGENCE

- ◆ Who does the initial proposal vetting/due diligence to ensure eligibility? How is this done?

### GRANTMAKING PRIORITY-SETTING & STRATEGY

- ◆ Who decides the grantmaking priorities and/or overall strategy for the fund? What is the structure and process for this?

### TYPES OF GRANTS (e.g., general, rapid response, capacity-building, field-building, etc.)

- ◆ What kinds of grants will be provided?
- ◆ Are there different criteria or processes for each?

### GRANTMAKING DECISION PROCESS AND PANEL

- ◆ Who comprises your grants selection panel? How are they selected? Are there designated slots for various stakeholders (e.g., donors, community leaders, former grantees, etc.)?
- ◆ What is the grant decision-making process? Are there stages to this? How do final decisions get made (e.g., consensus, voting, etc.)?
- ◆ Is there a conflict-of-interest policy or process?
- ◆ What happens if there is disagreement in the decision-making committee? How is this resolved (e.g., consensus, voting, etc.)?
- ◆ Will participants be compensated for their time, and if so, which expenses are covered?

### REPORTING

- ◆ Do you have reporting requirements?
- ◆ Do you do any kind of formal evaluation?

### GENERAL STRUCTURE

- ◆ What percentage of staff members are peers?
- ◆ What percentage of board/governance members are peers?
- ◆ What percentage of the grantmaking decision-making committee(s) are peers?
- ◆ Are there other committees or operational processes that involve peers?

## MECHANICS IN ACTION: SPOTLIGHT ON UHAI EASHRI

Below is a brief overview of UHAI EASHRI's grantmaking provided by executive director Wanja Muguongo. You can find the full version [online](#) as part of our digital appendix.

### GRANTMAKING PRIORITY-SETTING & STRATEGY

UHAI EASHRI (UHAI) is Africa's first indigenous activist fund for and by sex workers and lesbian, gay, bisexual, trans, and intersex (LGBTI) people. We fund civil society organizing for human rights and social justice in seven Eastern African countries. We also fund, partner with, and grow mission-aligned Pan-African human rights organizing across the continent.

UHAI supports a broad range of issues as identified and prioritized by sex worker and LGBTI communities in Eastern Africa. As a participatory fund, we are led and informed by local human rights activists. By ensuring that activists are not just beneficiaries of—but also decision makers for—support, we are building community agency and leadership. We are also changing how African human rights work is resourced—from foreign assistance to the ownership and self-determination of people who live those struggles.

In addition to being involved in grant decisions, our community (grantee) partners mentor and support each other. They also participate in UHAI's strategic planning, which provides programming and operational direction for the organization. Activists review and develop our strategic objectives and program approaches and decide on the sort, style, size, and scope of grants.

UHAI also involves activists in a planning taskforce that determines the agenda and overall structure of our biennial conference, Africa's largest convening of LGBTI and sex worker activists and donors. The results of this conference—including priority issues that emerge from the discussions—are used to shape UHAI's grant and program strategies.

### TYPES OF GRANTS

UHAI does not earmark funding for specific purposes or populations, but we are committed to diversity in who and what we fund and have a special focus on the most marginalized in our movements. Thematic areas for funding are guided by priorities that activists determine through our strategic planning.

All grants focus on constituency-led organizing that give diverse communities the power to determine their own journeys toward social change. Although UHAI only makes grants to registered organizations, we have an infrastructure to support unregistered organizations through fiscal hosts.

The majority of UHAI's grants are awarded by the Peer Grants Committee (PGC). Peer grants are flexible and made yearly in an open, competitive, and participatory process that follows a call for proposals. Seed funding, project, and larger program funding—as well as multi-year and unrestricted support—are provided.

### APPLICATION PROCESS

**Eligibility.** UHAI prioritizes funding to organizations that are led and managed by sex workers and LGBTI people. Mainstream movement organizations are also eligible, particularly when they can demonstrate meaningful community engagement.

**Outreach Process.** UHAI sends out a call for applications for Peer Grants each year through email, our website, social media, and listservs and by contacting key coalitions and networks. UHAI also reaches out to potential and current grantees through phone and email contact, organization visits, and conferences.

**Technical Assistance.** Applicants receive assistance in preparing their applications through one-on-one telephone/virtual conversations and/or emails with the grants team.

### GRANTMAKING DECISION PROCESS AND PANEL

**Grantmaking Panels.** Decisions about Peer Grants are made by the PGC, which comprises 13 activists nominated by and from sex worker and LGBTI communities across Eastern Africa. PGC members review grants requests voluntarily; however, UHAI covers all logistical costs and provides a small stipend for incidentals.



PGC members are identified through an open call for nominations, which is circulated to UHAI's partners who can either nominate themselves or nominate someone else. The list of nominated partners is short-listed by the Secretariat Grants Committee (SGC) and then approved by the board.

**Confidentiality and conflict of interest.** PGC members sign confidentiality and conflict of interest agreements that prohibit them from discussing anything that occurs during the process. PGC members also cannot review proposals from organizations with which they are affiliated.

**Orientation and Support.** Members take part in a virtual orientation to get acquainted with one another and the process itself, including review documents they will use for scoring. Existing members share their experiences with newer members, and any questions are addressed.

**Decision-making Processes.** For Peer Grants, UHAI issues a call for proposals in English, French, and Swahili. The SGC screens all applications for eligibility, disqualifying those that do not align with UHAI's criteria, values, and philosophy. Eligible proposals are translated into PGC members' native languages.

Each proposal is virtually reviewed and scored by three PGC members. All reviewers then meet in person to discuss/score each proposal again and create a list of proposals approved for funding. This list is determined by ranking the average scores of proposals; however, the PGC has leeway in ensuring that the final list includes marginalized groups that may have high scores but not enough to make the final cut.

UHAI's role in the PGC meeting is administrative, as well as providing the committee with information about organizations' grant reporting histories, accountability, and capacity needs. The list of approved proposals is sent to the UHAI board, which can review the PGC decisions and ask questions but cannot change or decline PGC decisions.

## GENERAL STRUCTURE

UHAI's staff is made up of activist professionals representing Eastern Africa's sex worker and sexual and gender minorities and allied movements. To ensure that UHAI remains activist-led, the board composition requires that two-thirds of members be activists affiliated with LGBTI and sex worker organizations in the Eastern African region. At least a third of the board are members who are not associated with an organization that could be a grantee.

To ensure continuity, at every grantmaking cycle, five members transition off the PGC, leaving six who have been previously engaged in the process. On average, a PGC member serves three terms, though this might be longer if it is difficult to find a replacement member from the same constituency.

## REPORTING, LEARNING, AND PROCESS ITERATION

Grantees are required to submit progress and final narrative and financial reports that include information on project inputs, outputs, outcomes, and impact. Internally, UHAI evaluates programming efforts through a Monitoring, Evaluation and Learning (MEL) Framework, which we use to take periodic assessments of our progress against three-year and annual targets stipulated by the strategic plan.

## MECHANICS IN ACTION: SPOTLIGHT ON GLOBAL GREENGRANTS FUND

Below is a brief overview of Global Greengrants Fund's grantmaking provided by deputy director of programs Allison Davis. You can find the full version online as part of our digital appendix.

### GRANTMAKING PRIORITY-SETTING & STRATEGY

Global Greengrants Fund makes grants to grassroots efforts around the world in support of environmental justice, human rights, and sustainability. We give approximately 800 grants to 90 countries annually and have an advisory network of 160 advisors reaching over 140 countries. Grant action areas are: climate justice; healthy ecosystems and communities; local livelihoods; right to land; water, and resources; and women's environmental action.

Grantmaking priorities are determined by decentralized advisory boards comprising environmental and social movement leaders and experts from the region where the grants are made. Advisory boards are managed by a coordinator who also comes from the local movements. Each advisory board sets its own grantmaking strategy, priorities, and criteria based on their assessment of local needs and opportunities. The advisory boards meet in person annually to review strategy and grantmaking results and adapt their approach to changing needs and context. Overall grantmaking guidelines (such as maximum grants size, principles of grassroots grantmaking, and conflict-of-interest policies) are set by staff and board of directors with input from advisors.

Our strategic plan and theory of change are developed through committees with representation from various parts of the organization, i.e., advisors, staff, and global board members. All staff are convened for input, and advisory boards provide feedback during meetings and through interviews and surveys. The board of directors makes the final approval of the organization's strategic plan.

### TYPES OF GRANTS

Our grants range from \$500 to \$15K and support action planning, exchange visits, capacity building, awareness raising, trainings, communications, innovative projects, advocacy, general funds, data collection, research, etc. We can quickly turn around emergency grants when needed.

### APPLICATION PROCESS

**Eligibility.** We fund community-based organizations, indigenous groups, voluntary associations, cooperatives, small NGOs, networks, and coalitions. We also fund groups that are not formally registered as NGOs. The number of funding cycles differs across various advisory boards. All proposals are screened by advisors/administrators to ensure relevance and eligibility.

**Outreach Process.** Advisors circulate notice of funding rounds by email to networks and coalition members with whom they work and orally with their contacts. They also sometimes run their own participatory process by asking a coalition of actors to make grant recommendations. Ultimately, grant proposals must be invited by an advisor, who presents the proposal to an advisory board for consideration.

**Technical Assistance.** Recognizing the administrative burden of our grantmaking process, our advisors offer feedback to applicants about their proposal ideas and help them navigate the process through one-on-one consultation. Our administrative staff (part-time consultants based in the regions) also help grantees with proposals and, because we accept proposals in many languages, translations. We also help find alternative ways to provide funds to grantees who may not have bank accounts or traditional fund transfer systems.

### GRANTMAKING DECISION PROCESS AND PANEL

**Grantmaking Panels.** Our grantmaking panels are made up of leaders from environmental and social movements. Advisors are recruited through our existing advisory boards. Depending on the strategy of each advisory board, we seek people from particular countries and geographic regions and people connected to different movements and networks. Although advisory boards look for gender and ethnic diversity in strategy development and grant decisions, they do not set targets. We have no set term limits; however, some advisory boards set their own terms based on their strategies and desire to reach new groups, networks, and geographies.

**Confidentiality and Conflict of Interest.** Our conflict-of-interest policy prohibits advisors from taking part in funding decisions involving their own organizations.

**Orientation and Support.** Advisors are given an orientation by the coordinator, supplemented by a written handbook and interactions with other advisors and staff. Much of the learning happens through participation on the advisory board with peers and annual reviews of grantmaking and strategy. We also provide distance coaching for some advisors.

**Decision-making Process.** The participatory process described above is used for all our grant programs. Exceptions to this include a separately managed donor advised fund and occasions when donors explicitly restrict funds for specific types of grants (although restricted funds must still match our main board's grants priorities).

The grant decision-making process varies from one advisory board to another, but generally it takes the following form:

- 1) Advisors identify promising organizations and projects and invite them to present proposals.
- 2) Proposals are submitted to the advisory board for a grantmaking round.
- 3) Advisors on the board review and rate a docket of proposals, asking and answering questions via email, teleconference, and/or in-person discussions.
- 4) The advisory board decides by consensus the proposals that will be funded and amounts.
- 5) Administrative staff gather and review additional due diligence materials from grantees.
- 6) Staff authorize final grant payments and notify grantees and advisors.
- 7) Advisors remain available to grantees for questions, mentoring, and other grant-related assistance.

## GENERAL STRUCTURE

Approximately 45 percent of our staff members and 20 percent of our main board are peers. One hundred (100) percent of the grant decision-making committees are peers.

Staff manage organizational operations and grant payments. Advisors review proposals and are volunteers, although we offer modest honoraria to advisors to help defray some of the costs of participating.

## REPORTING, LEARNING, AND PROCESS ITERATION

We request reports one year after the grant is provided. If language or literacy is an issue, an advisor can help complete the report form. Reports can also take the form of a recording or video.

Organizationally, we use longitudinal case studies that assess our grantmaking within particular socio-environmental movements every three to five years. Grant clusters, rather than one particular grant or grantee, are studied to understand how/whether small grants made a difference in the trajectory of movements.

Advisory boards and staff work together to hire consultants who undertake this research and, ideally, are from and knowledgeable about their communities. Consultants conduct visits and participatory action research, interview/visit grantees, and create spaces for feedback and learning. The learning is documented and often shared in workshops with grantees and key actors, as well as at funder conferences or events focused on environmental and human rights topics.

*You can find the full version of these mechanics [online](#), along with mechanics from other participatory grantmakers. We intend to add additional mechanics documents over time as a resource to anyone interested in learning from participatory grantmaking structures; reach out if interested. Visit our digital appendix at [grantcraft.org/participatorygrantmaking](http://grantcraft.org/participatorygrantmaking).*

Some funders use a combination of different kinds of grants. FundAction, for example, was established in early 2017 to support social movements in Europe via participatory grantmaking. The fund emerged from a synergy of increased demands from progressive activists throughout Europe and conversations among members of the EDGE Funders Alliance network, which hosts an annual retreat for its European members. At the 2016 meeting a small group of funders (Guerrilla Foundation, Open Society Foundations, European Cultural Foundation, and Charles Leopold Mayer Foundation) decided to pool some funding to experiment with participatory grantmaking. These funders then invited representatives of more than 30 social justice organizations to a series of workshops that led to the creation of FundAction.

***“There’s value to dialogue between the communities and the donors. Donors are more than their money; they’re part of the community.”***

– SERGEY VOTYAGOV

Since early 2017, a small group of activists and funder representatives have continued to design FundAction’s approach to participatory decision making, which will include providing three types of grants. “Rethink” grants will support European social movements to share and learn from each other; “Renew” grants will support pilot systemic change initiatives; and “Resist” grants will offer small rapid-response funding for urgent actions. Grant proposals will be shared with other applicants and European peers, who will review proposals and allocate available funding. In this way, FundAction hopes to build solidarity, strengthen collaboration, and shift power to those closer to the issues.

There are numerous ways to design a participatory grantmaking process, much of which will depend on the goals, values, and issues participants believe are important. What they have in common is that across each framework, donors are not driving the process; they are taking a back seat and structuring their role in ways that support what peers need. By doing so, they’re creating space for peers’ voices and lived experience to shape all facets of the process.

With this principle at the core, participatory grantmakers suggest several questions that will inform how this approach can manifest in new contexts. Consider using the tool shared on [page 39](#) to shape your own vision and guide conversation with your organization’s leadership and stakeholders. Read more mechanics of how others have designed their participatory grantmaking processes [here](#).

## DISCUSSION QUESTIONS

- ◆ What will your process look like and why? How could you use the tool to help make these decisions?
- ◆ Will you engage peers in making decisions about process and strategy? How?
- ◆ Which of the models outlined above comes closest to what you envision your process to be? Why?
- ◆ What kind of grants will you provide and why?

# Evaluation

Like other philanthropic approaches, participatory grantmaking can benefit from evaluation that assesses value, highlights best practices, and suggests improvements. However, because participatory grantmaking is more process-oriented, iterative, and relational than traditional grantmaking, its outcomes are arguably more difficult to codify or reduce to quantitative outcomes.

Moreover, participatory approaches have two sets of outcomes: 1) effective philanthropic investments and 2) increases in participants' sense of agency, power, and leadership.

As Moukhtar Kocache of Rawa Fund observes, "Traditional grantmaking evaluation paradigms usually apply an expected structure as to how things will play out, as well as concrete parameters as to what donors can expect. That's different than allowing the grantees to describe themselves, what's occurred, or what to measure and why. Instead, they're forced to describe their work within a pre-established framework, which means we never really see what groups do and don't do. All we know is what they tell the donors they're doing. We're engineering responses, rather than being open to what happens."

***"Traditional grantmaking evaluation paradigms usually apply an expected structure as to how things will play out."***

– MOUKHTAR KOCACHE

Rawa Fund is experimenting with self-evaluation methods that grassroots groups can use as learning tools, rather than management or "enforcement mechanisms." This shifts evaluation from assessment (have they done the right thing with the money?) to a learning mechanism (what did they learn and did they use that to improve

their practice?). Moukhtar Kocache says Rawa's self-assessment tools—which are being designed based on narrative, storytelling methodologies—aim to not only reveal more about how communities come together around problem solving but, in the process, achieve another important outcome: getting community buy-in or engagement. Sadaf Rassoul Cameron of Kindle Project agrees: "Yes, rigor is needed, and traditionally thought-of experts can be helpful, but the experts haven't gotten us very far in figuring out how to 'measure' philanthropic investments. That's because there's still a blind spot when it comes to evaluation. Harvard graduates automatically have a seat at that table, but indigenous or community residents often don't. It's time to start realizing the importance of bringing more diversity of experience and knowledge to the table when it comes to figuring out what to measure."

Aisha Mansour of the Dalia Association would like to see attempts to assess participatory grantmaking move beyond anecdotes, single grants, or outputs to looking at bigger impact. She suggests measuring this by looking at things like whether the community has continued to mobilize their resources after the grant money has run out: "Are they continuing to give and volunteer? Did they go on with life as normal after we left? Or did they keep mobilizing resources from their community? Real impact is when these kinds of things continue to go on after we've left."

In foundations new to the participatory grantmaking approach, one evaluation style can be comparing a portfolio that was using a traditional funding approach but then switched to a participatory approach, says Caitlin Stanton of the Urgent Action Fund. “They could then ask the groups that were funded whether and how they changed in any way. Did their outcomes, for example, change?”

The complaints many participatory grantmakers have about current evaluation models echo those of traditional funders because “the old ones set up people to fail,” says Sadaf Rassoul Cameron. Kindle Project found that asking grantees to write up reports about meeting predetermined outcomes had become a major deterrent in their ability to do the actual work. “Not to mention that

life changes. Organizations shut down. People have emergencies. Philanthropy never takes these variables into account; instead, it’s This is what you

***“A huge piece of letting go of power is understanding the value of flipping risk on its head.”***

– SADAF RASSOUL CAMERON

said you’re going to do—you’re going to do it.” Failure can also be an important outcome. “We see failure as a critical piece of learning,” Sadaf Rassoul Cameron says. “So why would we quantify it? A huge piece of letting go of power is understanding the value of flipping risk on its head. Risk is an opportunity; failure is a piece of that. There’s going to be mistakes. Accept it.”

## TOOL: QUESTIONS TO GUIDE RESEARCH AND EVALUATION

Below are questions that participatory grantmakers use most often to guide their reflection and evaluation, as well as those they think are priorities for further research.

### WHY SHOULD WE CARE ABOUT PARTICIPATORY GRANTMAKING?

- ◆ What value does participatory grantmaking add? How should value be measured?
- ◆ What are the long-term costs of doing/not doing participatory grantmaking?
- ◆ What are the benefits and challenges of participatory grantmaking?

### HOW DO WE KNOW WE’RE DOING IT RIGHT?

- ◆ Are we seeing the success of the grants programs the way we’d like to see?
- ◆ How do we define success? Is this the same as peers would define it?
- ◆ Do the outcomes we’re seeking include building the movement and knowledge base?
- ◆ What is our theory of change? Can we be more explicit about its components? Diagram?
- ◆ How representative of the movement/community are the people comprising our decision-making bodies? What value does this add?
- ◆ What is the role of donors/experts in participatory grantmaking and what value does it have?

### ARE OUR ASSUMPTIONS ABOUT PARTICIPATORY GRANTMAKING’S OUTCOMES AND BENEFITS CORRECT?

- ◆ Does participatory grantmaking lead to better/stronger philanthropic outcomes/impacts?
- ◆ Does it lead to better/stronger outcomes for grantees? Do outcomes/impact differ and under what circumstances?
- ◆ Does participatory grantmaking actually increase participants’ sense of leadership, agency, and/or power? How?
- ◆ Does this approach strengthen the efforts of larger movements? How?
- ◆ What are the long-term costs of not investing in participatory processes up front?

Moreover, seeing risk as opportunity or failure as success can change the trajectory. “We ask people to define and be creative about what success looks like for them. While some still send us the usual ‘we served 3,000 people,’ others have presented human success measures like ‘If I can make five kids smile this year, that’s success.’ We, as funders, have to let people themselves define what’s

success with their own stories and expectations! That, in turn, brings the humanity back,” says Sadaf Rassoul Cameron.

Some participatory grantmakers even question whether data should be used to measure something like participation because it’s “a value and principle in how you do things—not a neat

## HOW DO PARTICIPATORY GRANTMAKERS EVALUATE THEIR WORK?

**Youth Philanthropy Initiative of Indiana (YPII)** is currently conducting a five-year study to assess how alumni from the Indiana Community Foundation’s youth philanthropy councils—participatory grantmaking where young people make funding decisions—engage in philanthropic activities like volunteering and donating to charities beyond high school. At completion, the study will have followed nearly 60 participants from five different sets of alumni over a five-year period each. Initial findings for the first wave of participants will be published in 2019, and YPII plans to extend this study by following alumni for 10 additional years to explore their long-term philanthropic contributions beyond college, into their professional lives, and within a family unit.

Sadaf Rassoul Cameron of **Kindle Project** prioritizes the quality of the relationships developed as a function of the participatory grantmaking process, rather than “hard-and-fast outcomes or metrics.” One example: “We gave a gift to a woman who was nominated by one of our grantees who lives in a Texas border town and provides people crossing the border with water and whatever they need. We gave her money to support her work and vision. When we asked what she wanted to use the money for, she said she wanted to fix her teeth because she had major dental problems that were going to cost thousands of dollars to fix. What traditional funder would support this? How would you quantify that as success? But there’s the possibility that down the road, she will say, ‘now that I’m not in pain, I can give back even more to the community, help more people crossing the border, etc.’ If that’s not success, what is?”

The **Red Umbrella Fund**’s evaluation framework has three key outcomes: 1) the degree to which the Fund is adhering to its own values of being sex worker-led; 2) whether they’re building strong sex worker-led organizations by funding that, for example, allows people to pay for staff, trainings, and an office; and 3) whether they’re strengthening the larger sex worker rights movement through networking, communications, and community-building activities.

The **Headwaters Foundation for Justice** believes the best way to determine whether grants were effective investments is to leave the judgment to the community, rather than evaluate it internally. “We just ask the community or other funders whether the foundation is being perceived as being more community-centered by using a participatory grantmaking approach,” says Melissa Rudnick.

The **Arcus Foundation** has conducted two evaluations that looked at how their investments helped organizations grow and to what degree they were better equipped to address what was occurring on the ground. According to Erica Lim: “We found in Chechnya that one of our grantees had better capacity to deal with an emergency issue than they would have had four years ago. We also saw progress from the number of applications we’ve been receiving. When we started, there were very few organizations applying for any grants that were doing work on the ground receiving funds. After a couple years we began receiving many. We think that’s because the organizations we supported were growing and providing more resources to others around them. Some of the ones we originally seeded, for example, are now helping other new organizations that are popping up. We believe that all of this is the direct result of activists helping to make these grants.”

**Global Greengrants Fund** is experimenting with all kinds of methods, Terry Odendahl says. “One that we really like is something we piloted with our peer advisors to create the evaluation themselves. They go back to grantees three to five years later and ask questions about whether or how our funding made a difference. In another country, we hired an academic to look at our peer-led grantmaking at the 10-year mark through surveys and interviews. It showed that we were able to advance the environmental agenda more than some other funders because our grants were used for the strategies and needs the grantees felt were best.

equation,” Sergey Votyagov of the Robert Carr Fund says. He suggests that participatory grantmakers spend less time gathering evidence about the value of this process and more time “just doing this work because others will eventually see how it changes people’s lives.” He adds that even if there is evidence about outcomes, the best way to get people on board is for them to try it themselves. Then, reflection becomes a built-in feedback loop that builds trust and learning at the same time. “We’ve seen that once donors go through this process, their understanding grows pretty quickly. Our grantees spent three days with donors in same room looking at collective achievements and lessons learned, which led to a lot more openness to hear each other’s opinions. Donors said, ‘Now I understand why you want a participatory approach where donors and grantees look at scope of achievements together.’”

Ultimately, when it comes to evaluation, there isn’t a clear list of “dos” and “don’ts,” given participatory grantmaking’s iterative and relational nature. With its two sets of outcomes, measurement may not always be possible using standardized or technocratic-oriented approaches, but regular reflection and analysis of more qualitative variables—relationships, networks, movement

strengthening, organizational capacity, and community asset building, to name some—can and should be integrated more seamlessly into philanthropic evaluation overall.

## DISCUSSION QUESTIONS

- ◆ How will you evaluate your participatory grantmaking? What would “success” look like?
- ◆ What indicators will you use to assess whether participants increased their leadership, decision-making, collaborative, or other capacities and skills as a result of their participation in your process?
- ◆ What outcome indicators will you use to determine whether your initiative has had any impact at the participant, group, organizational, and/or community levels?
- ◆ How much time do you want staff, trustees, peers, and grantees to spend on evaluation?
- ◆ How will you and your grantees use the evaluative findings—both of process and of outcomes—to inform future work?
- ◆ Who will be responsible for pulling together, sharing, and using the evaluation?
- ◆ When will evaluation happen?
- ◆ How might evaluation learnings strengthen or shift power in both process and outcomes?

## WHERE’S THE GRANTS DATA?

Just how much money is awarded through participatory processes? How much are foundations awarding to support participatory grantmaking by other funds? What types of subjects and issue areas are addressed through participatory grantmaking? And which population groups are being reached through these efforts? These questions provide an important starting point for evaluating the scope of this growing field.

While Foundation Center has a long history of collecting data on grantmaking to identify who’s giving what, where, participatory grantmaking hasn’t been an area that we’ve specifically tracked through our taxonomy. But that’s about to change!

We’re currently working to add ‘participatory grantmaking’ as a strategy that will be assigned, where relevant, in our database of more than 12 million grants awarded by funders around the world. We plan to introduce this category in 2019 and are excited about the possibilities this opens up for future analysis of the field.

If you’re a funder who wants to make sure your grantmaking is captured as supporting participatory grantmaking, become an [eReporter](#) and submit your grants data directly to Foundation Center. Where relevant, use the term “participatory grantmaking” in your grant descriptions or (once available!) tag the grant with the new strategy code.



# Walking the Talk: Embedding Participation Internally

Participatory grantmakers agree that participation isn't just a nice or interesting thing to try. It's an ethos that's embedded in the values, practices, policies, communications, and behaviors of funders and grantees.

Across the board, participatory grantmakers employ the notion of inclusivity to more than their grantmaking. The New York Women's Foundation believes participatory grantmaking can't be done in a vacuum. Community voice is incorporated on its board and in their staffing, in how it does business and makes employment decisions, and in ongoing reflection about how inclusive and democratic the organization is. The foundation, like many participatory grantmakers, believes participatory process and conversation is essential to holistically realizing their mission.

So how can grantmaking organizations walk the participatory talk?

- ◆ **Assess hiring and staffing policies and procedures.**
- ◆ **Take a closer look at how your organization is structured.**
- ◆ **Make sure board and staff members understand, support, and commit to shifting power through participatory approaches.**
- ◆ **Be transparent about all the organization's activities.**
- ◆ **Periodically assess how you're doing.**
- ◆ **Do the internal work and fill in knowledge gaps.**

## **ASSESS HIRING AND STAFFING POLICIES AND PROCEDURES.**

Diana Samarasan points out that community representation in hiring decisions matters. "We have people with disabilities on both our

administrative and program staff. That sends a powerful message to the community we're funding. When we first started, the communities we were funding didn't believe that their donor contact was someone with a disability. They'd say, 'You're the donor contact? You're one of us.' It built trust and credibility and empowerment."

Staffing up inclusively—through both the hiring process and hires themselves—can be challenging. As one grantmaker says, "We've tried to bring our peer committee members into our hiring process, but we've run into problems. Our staff has to sign nondisclosure agreements, and peers haven't, which means there isn't assured confidentiality all the way around." Ana L. Oliveira concedes changes like updating hiring practices and priorities can be difficult because they touch on people's jobs, and that can lead to hard conversations. Nevertheless, The New York Women's Foundation remains committed to maintaining a participatory ethos by hiring people who have excellent relational and listening skills, as well as community-based participatory experience. Moreover, staff evaluations include assessing the ability to collaborate with—and help strengthen the skills of—community members and grantees.

## **TAKE A CLOSER LOOK AT HOW YOUR ORGANIZATION IS STRUCTURED.**

Embedding a more participatory ethos into any organization is hard, but it's particularly challenging for institutions with more bureaucratic,

hierarchical, and siloed structures. That's because participatory grantmaking rests on collaboration, rather than hierarchy and rigid departmental and job responsibility distinctions, and streamlined and transparent processes, rather than closed-off bureaucracies.

Making those kinds of changes, however, is a massive undertaking, even for grantmakers who are eager to make the move. Like most change, it's incremental. One way to begin is to assess your foundation's programmatic and administrative structures and systems. Are there opportunities for non-grantmakers to weigh in on program strategy through established advisory councils, regular convenings, etc.? Are program staff encouraged to collaborate across programs? Does the foundation involve staff members representing all ranks in developing internal policies? Are there designated seats for non-grantmakers to serve on the board? Are there ways the foundation could add new functions or departments focused solely on strengthening the capacity to engage non-grantmakers more effectively?

### **MAKE SURE BOARD AND STAFF MEMBERS UNDERSTAND, SUPPORT, AND COMMIT TO SHIFTING POWER THROUGH PARTICIPATORY APPROACHES.**

Ensuring that board members are also fully committed to this process is essential, says Carrie Avery from the Durfee Foundation. This commitment is integrated into all board members' job descriptions. "You can't join our board unless you've signed on to that principle right from the start."

Doing so takes work. Failing to first educate your board about the value of engaging people directly in grant decision-making processes—before making any grants—may actually hurt your chances of ever incorporating this approach going forward, one grantmaker says. "If we walked into a meeting with our trustees, who are all family members, and announced we wanted to bring in grantees to help them make funding decisions, they'd probably fire us. So, we're starting slow by

asking participatory grantmakers who've been successful at adopting this approach to come and speak to our board. Some program officers have begun supporting intermediaries that use this approach to regrant, and they explain to trustees why this approach is important for their strategy."

Another funder says that they've started to carve out time in their board meetings to discuss how peers can participate more in the grantmaking process overall—not just in making funding decisions—and to encourage honesty about any reservations peers may have.

### **BE TRANSPARENT ABOUT ALL THE ORGANIZATION'S ACTIVITIES.**

Katy Love notes that grantmakers can also reflect participatory values by being more transparent about all their activities. The Wikimedia Foundation, for example, does all its annual planning and reporting in the open. Monthly staff meetings are recorded and available on YouTube. The foundation also puts up its annual report on the web and invites public comments and questions. And, Wikimedia's planning process is the same one its grantees go through. "We ask our peer committee to review everything we're doing. Over time, we've seen having the participation of our grantmaking committees and communities in our annual planning is really important."

***"The process builds a culture of cooperation and spreading wealth, rather than competition and a lack of transparency in philanthropy."***

– HALEH ZANDI

The Knight Foundation has used collaborative scenario-planning processes that involve a mix of its staff and other stakeholders. The result, Chris Barr says, "was that everyone's opinion was valued and listened to—from assistants to vice presidents to scores of people outside of the foundation who helped us think through what that future looks like and how we evaluate the work we do."

Another way for foundations to be transparent is by making information and data (that doesn't pose security threats to constituents) about funded projects publicly available, including any negative results, posting updates on grantees' progress, and offering opportunities for non-grantmakers to offer suggestions and feedback.

### PERIODICALLY ASSESS HOW YOU'RE DOING.

How do funders know that they're incorporating participation as an ethos? Caitlin Stanton doesn't think it's rocket science. "If you're on board with the idea that the people who are closest to the issues probably have some good ideas about how to solve them—and that they are to be respected and compensated for their time to help with that process—you're probably on your way to incorporating a participatory ethos."

Moreover, once foundations open the door to these approaches, it can be hard to close again because, Allison Johnson Heist of the Headwaters Foundation for Justice notes, "it starts affecting everything you do, as well as how you think about your activities and structure. Yes, it's possible to go back to seeing participatory grantmaking in a foundation as a one-off, but you need to think about what this might convey. You could inadvertently be sending the message that you don't trust the community to do this or that it's too expensive or too time-intensive. Once you start doing participatory work, it can look bad if you start to backtrack."

### DO THE INTERNAL WORK AND FILL IN KNOWLEDGE GAPS.

Participatory grantmakers with a history of non-participatory approaches must communicate new ways of working and thinking across staff and board. Embedding participatory practice requires a willingness to learn and unlearn, which might mean changing staff onboarding, acknowledging and discussing internal power dynamics, and dedicating time to reflecting on if policies and practices align with the approach. Ensuring all staff members are aligned with the ethos of participatory grantmaking is critical, regardless of their role within the

organization. For example, Katy Love explains that at the Wikimedia Foundation, "Our finance and legal teams may not be directly involved in our grantmaking programs, but those colleagues all share the values of participation that are core to our efforts. Getting in sync with organizational values is a great starting point for grantmakers who want to critically examine their practices." Aligning staff members' understanding of the approach also promotes effective communication and mutual support.

Sometimes, aligning ethos means more than simply hosting conversations. For example, Haymarket People's Fund hosts an "Undoing Racism" workshop and offers mentoring and caucusing for their new members. People who are working at or with a foundation taking on a participatory approach benefit from space to unpack and discuss how things like race, mental health, identity, physical space, facilitation styles, and more influence community interactions. Even for participatory grantmakers who have always been participatory, there's still work to do. At FRIDA | The Young Feminist Fund, staff have made community care a priority through writing affirmations and a Happiness Manifesto, recognizing that to support their participants, they themselves need to support each other. By putting in this kind of work, staff are able to be better facilitators, improve their community outreach methods, and make space for constructive critique.

### DISCUSSION QUESTIONS

- ◆ Besides grantmaking, what other ways does—or could—your organization "walk the talk" of participation?
- ◆ Will there be organizational changes or resources required to implement more participatory policies or systems? Which and why?
- ◆ What would you do? How have you re-educated staff and board after adopting a new approach?

# Getting Started

Participatory grantmaking can seem daunting at first, especially for larger or more traditional philanthropic institutions that may have entrenched systems and bureaucracies or lack direct connections to communities or constituencies.

It may also be challenging for very small foundations that don't appear to have sufficient staff resources to undertake a participatory process and/or where doing so might divert resources from the community.

Much participatory grantmaking, in fact, has emerged from place-based efforts or those focusing on particular issues or constituencies. This may be, one grantmaker notes, because "it's easier to involve the people most affected by issues funders are supporting when it's clear who those people are." And many of those efforts are small (staff and assets) but focused.

That doesn't mean other kinds of funders can't do participatory grantmaking—they can and do. Rather than dive into participatory grantmaking immediately, however, many funders are easing their way into it by incorporating other kinds of participatory approaches into their activities, e.g., convening grantees to brainstorm about strategy and identify issue priorities, inviting peers to sit on advisory councils, engaging peers to do participatory research, etc. These efforts can be overlapping and fluid, depending on circumstances and contexts, and lay good groundwork for a foundation to adopt a participatory grantmaking ethos and process.

No matter what form participatory philanthropy takes, all agree that what matters is that everyone involved understands that these efforts take time, patience, and a lot of sweat. It's a commitment with long-term payoff that necessitates sticking to it in the short term.

- ◆ **Begin with small steps.**
- ◆ **Be clear about why you are interested in doing participatory grantmaking and for what purpose.**
- ◆ **Understand and practice the art of good listening as a necessary first step toward authentic and meaningful participatory philanthropy.**
- ◆ **Be prepared to continually reflect and iterate on the process, and seek feedback.**
- ◆ **Consult others who have done it.**

## BEGIN WITH SMALL STEPS.

Rather than dive into participatory grantmaking right away, funders can start small by selecting just one or two portfolios or program areas and explore how participation could be marbled into them. Nadia van der Linde of the Red Umbrella Fund suggests that funders focused on a specific population, topic, or geographic area begin by setting up a system involving the people they're trying to reach in discussions about priorities or strategies. This may help them build understanding and participatory ethos across the institution over time.

Diana Samarasan adds: "Let's say a foundation has decided to develop a new program around economic justice. They can ask themselves things like: 'How can we ensure that we're going to get the voices from the community of economic justice actors in from the beginning to build/create the strategy? Can we get someone on our advisory board who represents this community? How

about new staff members who come from the community? How are we going to make decisions about grants—who’s involved? Do we want to put some of the money we’re giving out into the hands of economic justice activists?”

Large foundations can embark on long-term learnings. For example, one way NoVo Foundation integrated participatory approaches was by conducting a year-long set of listening sessions with girls of color, movement leaders, and organizers as they developed their movement-building strategy. While this wasn’t participatory grantmaking, the foundation had to be realistic. “While it would be ideal to have peers at the table making grant decisions, “it would require an enormous amount of capacity we just didn’t have or could have incorporated at that time. So we tried to figure out other ways we could meaningfully center girls of color across the development of actual strategy,” adds Jody Myrum. Sadaf Rassoul Cameron of Kindle Project agrees that there are many ways to start involving stakeholders in shaping grantmaking, like involving non-donors in designing strategy. That’s different from making grant decisions, she says, but there’s “still power in this.”

***“If you’re on board with the idea that the people who are closest to the issues probably have some good ideas about how to solve them—you’re probably on your way to incorporating a participatory ethos.”***

– CAITLIN STANTON

Andrea Hernandez, formerly of the Frieda C. Fox Family Foundation, had the board give staff some start-up capital and time to experiment with participatory grantmaking and said, “see what you can do with this. The subtext was ‘we don’t have to go all the way right off the bat or know where it’s going to lead, so think of this as a kind of ‘R&D’ investment.’ “ They decided to use this

initial capital for convenings, which Hernandez says led to deeper conversations about establishing a participatory grantmaking effort aimed at strengthening the youth philanthropy movement. “This initial effort, which became a big part of the foundation’s budget, has since spawned similar efforts in more than 25 additional family and community foundations across the country.”

Above all, be patient because these efforts take time. “We’ve seen some funders who are interested in implementing an initial participatory grantmaking effort give themselves a long pilot time of three to five years,” Melissa Rudnick of Headwaters Foundation for Justice says, “because it’s going to take a long time to learn about how this works before it can become a permanent part of their grantmaking programs.”

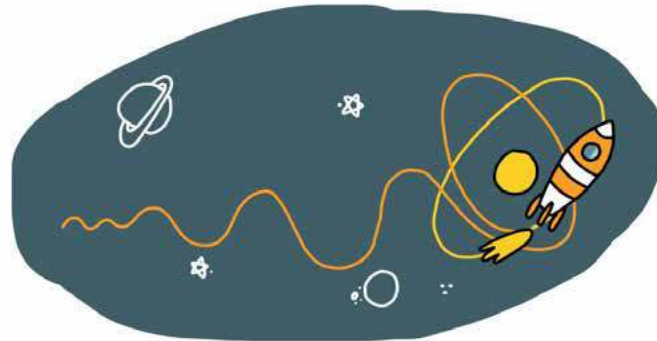
### **BE CLEAR ABOUT WHY YOU ARE INTERESTED IN DOING PARTICIPATORY GRANTMAKING AND FOR WHAT PURPOSE.**

For some grantmakers, this may mean identifying the most strategic way to integrate community participation, and the answer may be an alternative participatory practice. In one case, the NoVo Foundation was developing an operational program to support a larger movement, so they spoke with over 150 movement leaders during the design phase. Throughout program implementation, they continued to co-design with people across that movement. “In short,” Jody Myrum says, “you need to ask, what’s the goal of doing a participatory process, and what are you trying to figure out? There are many effective ways to bring communities into this process at different points of the strategy and grantmaking process, and prioritizing when and how will make your grantmaking more effective.” The NoVo Foundation also supports participation by funding regranteeing organizations that integrate strong participatory practices in their grantmaking, and also participate in donor collaboratives where, collectively with other funders, they implement a participatory grantmaking process.

## GETTING STARTED

THE ROAD CAN BE BUMPY,  
SO TAKE YOUR TIME TO BUCKLE  
INTO YOUR INTENTIONS.

EACH STEP IS FLUID AND INTERCONNECTED  
AND SOME MIGHT REQUIRE MORE WORK OR  
A BIGGER SHIFT IN PRACTICE THAN OTHERS.



BEGIN WITH SMALL STEPS  
BUILD TRUST AND TAKE A LEAP!

WELCOME TO THE GALAXY OF  
PARTICIPATORY GRANTMAKING!  
BE PREPARED TO CONTINUALLY  
REFLECT, ITERATE, AND SEEK FEEDBACK.

### UNDERSTAND AND PRACTICE THE ART OF GOOD LISTENING AS A NECESSARY FIRST STEP TOWARD AUTHENTIC AND MEANINGFUL PARTICIPATORY PHILANTHROPY.

Participatory grantmakers agree that one of the most simple and important things funders need to do in these processes is listen—something that, they admit, is much harder to do than it sounds. While listening is necessary, it's not sufficient if the goal is authentic participation. Foundations that don't commit to actions based on what they hear from participatory grantmakers will quickly lose credibility and trust with participants.

Acknowledging what participants have to say through direct action is a critical part of ceding power and empowering participants to feel heard. Involving participants and then carrying on with business as usual does nothing to shift who has the power and disregards community knowledge. And if foundations don't commit to making changes based on this listening, they're going to lose trust fast. Katy Love of the Wikimedia Foundation notes, "Opening up your ears and then doing business the same way isn't

going to help you build trust with communities you're trying to serve." The bottom line, she says, is that "listening to a community to seek to truly understand needs is an essential starting point. Hopefully, over time, donors will realize that the best way to involve peers is through participatory grantmaking."

### BE PREPARED TO CONTINUALLY REFLECT AND ITERATE ON THE PROCESS AND SEEK FEEDBACK.

Participatory processes can be complex, challenging, and downright messy because they involve human beings who bring a wildly diverse set of experiences, personalities, backgrounds, and opinions to the table. And because participation at its core encourages this complexity, these processes will be continually changing—and should be, if they're truly participatory.

Many participatory grantmakers not only are comfortable with this, but do everything they can to encourage regular tweaking of their processes and policies. Nadia van der Linde says that every time the Red Umbrella Fund's grant panels meet,

they talk about how the process can be improved. After each of these discussions, the Fund has changed at least some part of its structure or process to reflect their input.

The International Trans Fund, which is still in a start-up stage, is doing likewise and incorporating regular surveys to their process, says Broden Giambrone. Already, that feedback has helped the Fund reconsider its approach. When it began, there were limited guidelines for the application process because activists wanted to keep it as open as possible. After a few cycles, though, they had to change because they were getting way too

many applications, and reviewers were becoming overwhelmed. While keeping things open to start made sense, they learned the value of iterating on their structure periodically.

Allison Johnson Heist of Headwaters Foundation for Justice recommends that grantmakers interested in participatory grantmaking get used to having conversations about the hard questions that will continually surface in these processes, such as: How much time/resources can you put into this? How much shared power can you stomach? What if the group makes a decision that the board or staff doesn't like? What's your appetite for challenges that arise? What's

## FOR FUNDERS WHO SAY THEY CAN'T DO PARTICIPATORY GRANTMAKING

**Not all funders will be able to implement their own participatory grantmaking processes because their institutions, policies, and/or structures just won't allow for it. But the good news is that they can support the approach in several ways:**

- ◆ Support other participatory grantmaking funds and initiatives. Identify strong intermediaries that are working with organizations directly “on the ground” and fund them to serve as regrants. One large international foundation, for example, has integrated the use of these kinds of intermediaries as a recommended part of each program's overall strategy. A criterion for support is that the intermediaries need to show that they're using or plan to use some kind of peer-led participatory grantmaking process. A number of the participatory grantmaking initiatives featured in this report are supported by other foundations who recognize that these grantmakers are uniquely positioned—with existing infrastructure and trusted relationships with communities—to carry out their own participatory grantmaking processes.

When the Bush Foundation realized that smaller groups weren't able to absorb the larger grants it gives, it tapped the Headwaters Foundation for Justice to serve as an intermediary. Headwaters facilitated several participatory grantmaking processes that not only moved money to these smaller groups but also helped build relationships between them and the Bush Foundation. “I think the Bush Foundation, says Melissa Rudnick, “would say that entrusting us with the resources to do this participatory grantmaking has broadened their pool of people who've received their resources and helped them get closer to community.”

- ◆ Sponsor convenings, educational forums, and other gatherings that encourage more understanding and awareness of participatory approaches, including grantmaking. The Human Rights Funders Network, for example, has a special working group dedicated to participatory grantmaking and holds workshops at the annual conference and throughout the year.
- ◆ Provide resources to develop and expand participatory models and infrastructure; the Ford Foundation, for example, is supporting a collaborative of place-based public foundations such as Social Justice Fund Northwest and North Star Fund and a coalition of Detroit community-organizing groups.
- ◆ Allocate adequate funding for designing and conducting rigorous research and evaluation efforts about participatory grantmaking that can assess its value added, outcomes, and benefits. Also be willing to support new and alternative approaches to evaluation that can capture the more nuanced, iterative, and relational aspects of social justice work—something that would benefit philanthropy overall.
- ◆ Support youth grantmaking, an approach to participatory grantmaking in which young people award monetary contributions to organizations of their choice through established institutions or governing bodies. According to Moukhtar Kocache of Rawa Fund, it's worth encouraging young people to take up the mantle of participatory approaches because “once we create these spaces and formats, the younger generation are going to adopt and use them as a given.” To learn more about youth grantmaking, visit [youthgiving.org](https://youthgiving.org).

your plan for dealing with things if they're harder than you thought? What will you do if people don't like what you're doing or saying? Are you ready to train your board to be comfortable with turning over the power to the committee? "Ask yourselves these questions because many or all of them will crop up eventually. And understand that those challenges aren't bad; they're just part of doing work this way."

Grantmakers who aren't used to getting honest feedback—especially immediate feedback—may struggle to adjust, but it's worth it, says Osgood, a peer grantmaker with Maine Initiatives. "I have so much respect for them because they asked questions when they arose, and if participants said something was missing or they didn't feel like they were being treated as partners, they listened and then revamped the process based on that feedback. There was a real spirit of co-learning. They learned from us, and I've learned so much more about how grantmaking works."

Osgood notes that being open to feedback and learning can also help when conflicts—including power dynamics—emerge. "People doing this work are definitely passionate because so many are from oppressed groups. Maine Initiatives had excellent facilitation that encouraged honesty and learning, which allowed us to steer through those moments. They're humble. They integrate feedback. They care a lot but they don't micromanage. They have a lot of trust in us as a community. They used their role as a funder to do transformative—not transactional—organizing.

They're using their positioning to leverage their power on behalf of the community. They're not just giving to community but building community around funding. All of that is so different from traditional funders.

### CONSULT OTHERS WHO HAVE DONE IT.

It sounds obvious, but it's surprising how often grantmakers forget that their colleagues can often provide valuable advice. Broden Giambrone says that before they launched the International Trans Fund, they spent a lot of time talking to other funders like the Red Umbrella Fund. "There's so much work being done in participatory grantmaking and by people who've been doing it for a while. Talk and learn from them—don't reinvent the wheel. Yes, the way you apply their knowledge may be different, but it's ok to tweak because you have to start somewhere."

### DISCUSSION QUESTIONS

- ◆ Does your organization have the capacity and/or culture to engage in a participatory grantmaking program? If not, what would need to happen to have a program?
- ◆ If your organization isn't able to dive into participatory grantmaking, are there other ways it could support this practice?
- ◆ What would be a simple and reasonable first step to shift your practice to be participatory?
- ◆ If you're a seasoned practitioner, what insights from other participatory grantmakers can you apply to your work?

### LOOKING FOR MORE?

This guide, along with an array of helpful resources are all available at [grantcraft.org/participatorygrantmaking](https://grantcraft.org/participatorygrantmaking). You'll find videos of participatory grantmakers answering commonly asked questions, detailed accounts of different approaches to participatory grantmaking—what we're calling "the mechanics", and a live list of additional resources. Additionally, check out reports, evaluations, infographics, and other publications in our IssueLab special collection: [participatorygrantmaking.issuelab.org](https://participatorygrantmaking.issuelab.org). Affinity groups such as [Grassroots Grantmakers](#), [Human Rights Funders Network](#), and [EDGE Funders Alliance](#) also have special convenings and peer information sharing dedicated to participatory grantmaking practice. Know of a resource that's not listed? Reach out to us at [participatorygrantmaking@foundationcenter.org](mailto:participatorygrantmaking@foundationcenter.org).



## APPENDIX

# Models of Participation

Here, we share three models of participation that can help frame scales of participation. The first two models are two of the most referenced in participatory research. The third is a model specific to participatory grantmaking developed for *Participatory Grantmaking: Has Its Time Come in 2017*,<sup>10</sup> which inspired much of how participatory grantmaking was framed in this paper.

### ARNSTEIN LADDER OF PARTICIPATION

**Citizen Control.** Participants (“the public”) handle the entire job of planning, policy making, and managing a program or initiative with no intermediaries.

**Delegated Power.** Participants have a clear majority of seats on committees with delegated powers to make decisions and assure accountability.

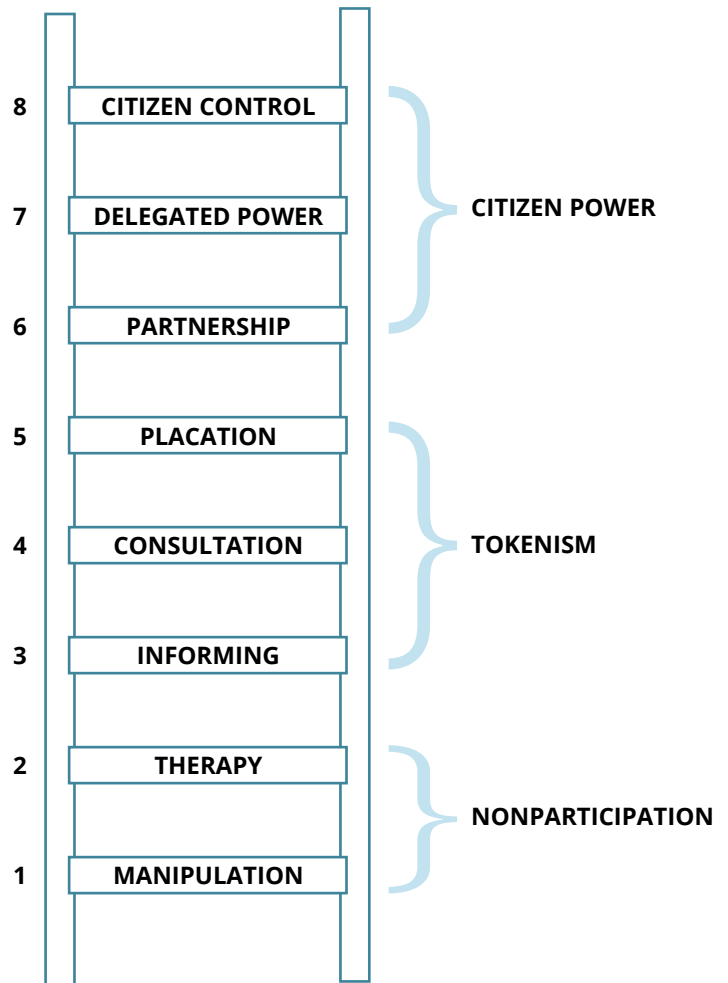
**Partnership.** Planning and decision-making responsibilities are shared through joint committees of participants and public officials/experts.

**Placation.** Participants can advise but public officials and other power holders have the right to judge the legitimacy or feasibility of the input.

**Consultation.** Public officials and other decision makers use surveys, community meetings, and public inquiries to elicit and gauge participants' opinions.

**Informing.** Public officials and other power holders create a one-way information flow with no feedback channels for participant reactions or input.

**Manipulation and Therapy (Nonparticipatory).** Public officials and other power holders seek to “cure” or “educate” participants, using public relations strategies to build public support.



Sherry Arnstein's “ladder of citizen participation,” developed in the 1960s, depicts several categories of involvement ranging from a high to low participation.

## PUBLIC ENGAGEMENT SPECTRUM

INCREASING LEVEL OF PUBLIC IMPACT					
PROMISE TO THE PUBLIC	INFORM	CONSULT	INVOLVE	COLLABORATE	EMPOWER
	We will keep you informed.	We will keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how public input influenced the decision.	We will work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how public input influenced the decisions.	We will look to you for advice and innovation in formulating solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible.	We will implement what you decide.

The International Association for Public Participation (IAP2) developed the Spectrum of Public Participation to define the varying roles of the public in participatory processes. The spectrum is based on IAP2's belief that participatory approaches depend on factors such as goals, timeframes, and available resources.

## FRAMEWORK FOR PARTICIPATORY GRANTMAKING



This framework, developed by the Ford Foundation, is a “starter” framework for participatory grantmaking and outlines forms of communication and responsibilities of grantmakers and non-grantmakers.

# Endnotes

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