**Practical Guide to Equitable Grantmaking Strategies**

**Efficient and Effective Examples**

**Introduction**

What does your foundation want to be known for in your community? This first starts with a values conversation - what values does your organization hold up? Equitable grantmaking is an outcome of a foundation living into its vision, mission, and values. It is not an end goal, it is a tool to better equip a foundation to reach its vision.

During our collective daily work in philanthropy (and some of us historically from the other side of the table as grantees), we see how some practices have an inequitable impact on grantees. We see how burdensome and laborious some of our requests are on certain organizations - many of whom don’t ultimately receive funding. We see that our portfolios lack diversity.

Our Hull Fellows Capstone Project aimed to research and interrogate current grantmaking practices that occur in differing types of philanthropic institutions. We heard first-hand from grantees and learned from other funders how grantmaking processes can be improved to move from an inherent power dynamic to a partnership. We looked at the full picture and structured our guide to equitable grantmaking strategies in three sections:

* Funding Parameters and Outreach,
* Application and Review, and
* Evaluation and Reporting.

Being more equitable throughout our processes allows us to widen our engagement pool, bring more great ideas to the table, and raise the tide for all the people we serve.

**Starting Point: Grant Partner Feedback**

Through our research and design of this toolkit, we wanted to incorporate different voices and perspectives on the grantmaking process. We began by surveying nonprofit organizations in the Southeast. 60 respondents from 11 southeastern states participated in the survey, representing a mix of nonprofit organizations focusing on diverse causes areas. The survey was open for approximately 3 weeks in July 2022. The purpose of the survey was to gather feedback from organizations to identify the pain points they experience when seeking, applying for, and securing funding. All responses were completely anonymous and aggregated with other organizations. There is something that all funders can learn from these results. You can find survey highlights in each section of the guide. Later in this toolkit, you will find personal reflections on the survey results from each of our Capstone group members.

**Examples in Action and Best Practices**

In addition to gathering research on current trends and best practices in philanthropy, we interviewed several foundations on the changes they’ve made in efforts to increase equity in their processes. From those interviews, we compiled case studies, which we are calling Examples in Action. These examples provide tangible practices from funders that have made transformational changes, resulting in more investments to underfunded organizations and a more diverse funding portfolio. Using all the information, we outlined some efficient and effective practices that funders can use at whatever point they are in on their journey.

As grant management staff we know that there are multiple layers to reforming our funding priorities, opportunities, and processes. Even the most progressive of us understand that it’s a huge step from one-time small, project-based grants to multi-year unrestricted funding. We also know that there are at least five changes we can all make to help us build trust with our nonprofit partners and embark on the road to equity. This guide is designed to help essential staff identify practices that perpetuate inequities and provide them with specific examples of how they can start to make positive changes.

**Funding Parameters and Outreach**

**By: Melissa Furr (Blackbaud), Wankeeta Jackson (Foundation for Louisiana), and Aerial Ozuzu (Community Foundation of Greater Memphis)**

Most grantmakers have established funding parameters for their grants which help a prospective applicant determine whether or not they fit the portfolio overall and whether they should bother applying for funding. In most cases these parameters and funding strategies are created without diverse perspectives and voices and often overlook what communities define as their needs. How often, if ever, do grantmakers step back and reassess their funding parameters to ensure they are incorporating diversity, equity, and inclusion into them? What are some ways they can ensure they are not systematically excluding prospective grantees? With outreach being equally as important, how do grantmakers reach all the communities they aspire to serve and ensure they receive inquiries or requests from new, emerging, and diverse organizations? This section will take a close look at funding parameters and outreach from the grantee perspective and describe how some funders are innovating to be more inclusive in these areas.

**Survey Response Highlights:**

Survey respondents have reported the following as barriers or impediments they are experiencing:

* Most funders have been somewhat collaborative in working with organizations to decide their goals, strategies, and outcomes for their grantmaking programs. (52%)
* Respondents desire more collaborative processes to ensure funding priorities and proposals align with the needs of the community.
* Organizations are not always getting clear goals and strategies from funders. Many respondents identified that it is helpful when funders are clear about their focus areas, funding priorities and grantmaking programs.
* Organizations get information about funding opportunities in many different ways - the highest being researching funder websites (85%) and word of mouth (82%)

**EXAMPLE IN ACTION: Medtronic Foundation (Corporate Foundation)**

*Medtronic Foundation launches their* [*STEM funding*](https://news.medtronic.com/2022-01-21-Medtronic-Foundation-launches-new-STEM-partnerships-to-serve-over-60%2C000-underserved-and-underrepresented-students) *portfolio.*

The Medtronic Foundation partners to improve health for underserved populations, as well as supports communities where Medtronic employees live and give. They work at three strategic levels - as strong partners with organizations striving to improve health outcomes, as volunteers serving as integral members of the community, and as a global citizen engaged on issues affecting underserved populations.

Medtronic made the deliberate choice to look closely at any existing inequities in funding and to do research into the concept of decolonizing funding. As a result, they prioritized a more inclusive outreach process for their grantmaking to ensure that more diverse grantees would be included in their funding. They’ve set a goal of 60% diversified organizations funded through this funding portfolio and are well on their way to realizing this vision.

**Organizational and Process Shifts:**

* Created employee nomination process to increase and diversify organizations that were screened and invited to apply for funding
* Hosts open forum information sessions to help educate potential grantees on funding priorities and processes
* Increased accessibility of information, materials, and assistance to ensure they are reflective of the cultural and regional nuances of those regions where a cycle is taking place
* Offers technical support to organizations from inquiry to post-award

**EXAMPLE IN ACTION: Nielsen Foundation (Private Foundation)**

*Nielsen Foundation funds a whole new slate of grantees.*

[The Nielsen Foundation](https://nielsen-foundation.org/) is a private foundation originally funded by Nielsen, a global data and analytics company. Their mission is to support organizations that give voice and opportunities to historically under-represented groups and communities. The Nielsen Foundation provided more than $1.97 million in grants to 49 nonprofit organizations in 2021 across their priority areas of educational access and persistence, economic mobility and well-being, and representation in media and technology.

Through the [2021 Data for Good](https://nielsen-foundation.org/2021/12/16/nielsen-foundation-announces-2021-data-for-good-grantees/) grants program, the Nielsen Foundation committed $250,000 in grants to build data capacity and strengthen the programs of five diverse-led organizations advancing economic mobility and well-being in historically underserved communities across the United States. With the 2021 Data for Good grantmaking cycle, the foundation prioritized small, diverse-led nonprofit organizations -- a category which has been historically under-served by traditional philanthropy. The Nielsen Foundation also leaned on a wide range of sources to help connect them to prospective grantees that were not previously on their radar. They relied on employees (including members of their Business Resource Groups), Foundation board members, and philanthropic consultants to help diversify the list of organizations they would invite to apply for funding. As a result, they succeeded in creating a cohort of grantees that had not previously received funding from the Nielsen Foundation and, in some cases, from larger corporate donors and foundations. They were careful to provide very clear funding eligibility guidelines to applicants and in many cases conducted “cold” outreach to organizations to introduce the foundation, their funding opportunity and invite them to apply. This personal touch and follow up yielded a more inclusive and accessible process for grantees. The 2021 call for proposals noted: “Recognizing the serious systemic inequities and racial disparities in today’s philanthropic funding environment, [the 2021] Data for Good grants program focused on smaller, diverse-led organizations to help build their capacity and support their work to use data to inform decision-making, improve their programs and expand their support and impact.”

**Toolkit - Efficient and Effective Practices:**

* Incorporate diverse voices and perspectives in the creation of funding parameters and strategies - ideally community members, but at the very least program staff.
* Funders should interrogate how the knowledge of funding opportunities are being shared with the communities they serve and seek out exclusionary language or behaviors.
* Create multiple opportunities for the community to learn about the funding opportunities, eligibility, parameters, and grant process in a live information session (virtually or in-person). Allow recordings to live on the website for easier access for sharing.
* Commit to a practice of intentionally seeking grantee partners from community-based organizations with deep roots in community and traditionally overlooked by philanthropic institutions such as BIPOC/LGBTQ+ led organizations.
* Create pathways for community members to be connected to your work such as a newsletter and a link to sign up for the newsletter where opportunities will be distributed to subscribers.

**Application and Review**

**By: Aerial Ozuzu (Community Foundation of Greater Memphis), Suzanne Philemon (Cannon Foundation), Ashley Whitt (Spartanburg County Foundation), and Chloe Wiley (The Blue Cross Blue Shield of Louisiana Foundation)**

Applications are widely used as the method to source and screen nonprofits to identify and select the organizations that align with the funders goals and will be supported to do their work. While inequities exist within all the steps of the grant process, organizations experience them most during the application and review. Everything from how the application is structured and what is accepted to who reviews and makes decisions affects the applying organizations. In this section, we look at the current practices and processes and offer examples and recommendations on how funders can make changes to lessen the burden on organizations and increase equity in their applicant pool and selection of grantees.

**Survey Response Highlights:**

* The majority of respondents spend an average of 20 hours on the proposal process
* Nearly half of respondents receive no communication during the review process making it hard for funders to build relationships with nonprofit partners.
	+ The majority of respondents noted that they only wanted to be engaged when there was a significant change during the review (i.e. meaningful communications as the application advanced in the process).
	+ Funders often make decisions based on the application alone vs. meeting with grant seekers.
* Organizations noted and appreciated feedback on funding decisions to help improve the grant seeking process.
* 52% of respondents noted grantmakers asked for feedback on the process while less than 10% of funders incorporated that feedback into their grantmaking.
* The majority of organizations have to conduct research or find information requested on applications (70%).
* Most organizations have access to the internet and the technology they need to submit applications electronically (98%).
* More than half of the respondents received notification within 4-6 months.

**EXAMPLE IN ACTION: Winston-Salem Foundation (Community Foundation)**

The Winston-Salem Foundation, founded in 1919, is a community foundation focused on Forsyth County, North Carolina. Until 2016, the Foundation had a history of serving as a responsive grantmaker for any type of projects within the geographic boundary of Forsyth County. That year, they began to shift their community investment work to develop an emergent grant strategy that was informed and guided by their community partners. The Community Investment staff began using an “evocative grantmaking model” in which collaborative relationships are formed with grantees that cultivate critical thinking, learning, and adaptation vs. the traditional behavior (like a bank loan officer) of giving grants in return for prescribed programs and outcomes. This shift in Winston-Salem Foundation’s grantmaking practice created an equitable environment of allyship where each organization brought their own strengths, their own expertise, and put down the walls of traditional power structures to learn together.

**Organizational and Process Shifts:**

* Shifted foundation culture by operationalizing their values
* Hosted community listening sessions and identified two broad focus areas in the most pressing community challenges.
* Decreased funder/grantee dynamic and created authentic partnerships by implementing new tools based on the principles of Trust-Based Philanthropy and Emergent Learning Practices
	+ Transitioned from traditional application to Before Action Review where program staff complete questions with potential grantees to identify goals, challenges, and success
	+ Transitioned from traditional reporting to After Action Review where they collectively compare actual and intended results and identify
	+ Increased transparency with grantees by sharing screens during reviews

**EXAMPLE IN ACTION: The Blue Cross and Blue Shield of North Carolina Foundation (Corporate Foundation)**

The [Blue Cross and Blue Shield of North Carolina Foundation](https://www.bcbsncfoundation.org) is a private, charitable foundation established as an independent entity by Blue Cross and Blue Shield of North Carolina in 2000. Over the past two decades they have invested more than $190 million in North Carolina through nearly 1,300 grants, collaborations, and special initiatives. They operate under the mission to improve the health and well-being of everyone in North Carolina.

The BCBSNC Foundation team believes that grantmaking is one of the most significant means by which they can impact racial equity. They began their organization’s equity journey about six years ago and staff are proud of the changes made to their grantmaking processes to simplify and make them more accessible to community-based, grass roots organizations, resulting in a more diverse portfolio of grant partners across the state.

**Organizational and Process Shifts:**

* Expanded and diversified team: grown from 7 all white team members in 2016 to 15 representing a deeper reflection of the communities served; the majority of staff and leadership are now people of color.
* Right-sized applications based on award amount.
* Prioritized offering more intensive technical supports prior to submission deadlines which include one-on-one consultations
* Enlisted and paid community stakeholders to review LOIs and participant site visits
* Shifted to site visits vs. formal written application

**Toolkit - Efficient and Effective Practices:**

* Transparency/public facing commitments are key to accountability.
	+ Host informational webinars at least 2 months prior to application deadline.
	+ Provide one-on-one consultation appointments.
* Replace application with site visit questions and include community level experts to serve as reviewers.
* Share real example(s) of a previously awarded grant when putting out an RFP.
* Try community-informed grantmaking as a step towards participatory grantmaking.
* Pay and/or offer small grants for community advisors and organizations that make it to final consideration to honor effort and build trust.
* Funders should leverage their own staff to find public documents (Guidestar, 990s, etc.) and work with other funding partners to create a streamlined list of commonly required documents for submission.

**Evaluation and Reporting**

**By: Tabinda Ghani (Humana Foundation), Wankeeta Jackson (Foundation for Louisiana), Leah Jones-Marcus (Dogwood Health Trust), and Chloe Wiley (Blue Cross Blue Shield of Louisiana)**

This section focuses on what happens after the award is made. This can look like many things for many organizations, but in general looking at how funders measure and define progress towards the goals of the funding. What question or set of questions does your organization want to be able to answer or solve with this individual grant or this body of work? It can be centered around the work carried out by a grantee partner, or it can look at the overall strategic vision of a funder.

**Survey highlights:**

* Nearly 96% of survey respondents stated that funders wanted written grant reports.
	+ With approximately 50% of those also requesting a site visit or phone call
	+ While the ways that grantees prefer to report on grant progress was widely varied:
		- 26.5% prefer a written report only
		- 24.5% prefer a phone or zoom call to discuss
		- 22.5% prefer to complete a pre-agreed upon checklist or set of questions during a conversation with staff
		- 18.4% preferred other options with many saying it should depend on the size or type of the grant
		- 8.2% prefer a site visit only
* More than 60% of respondents shared that funders don’t ask for feedback or share their learnings back with the grantee.
	+ While about 86% of respondents shared that the learning would be valuable to their organization

**EXAMPLE IN ACTION: The Blue Cross and Blue Shield of North Carolina Foundation (Private Foundation)**

*Conversational Reporting Process*

The [Blue Cross and Blue Shield of North Carolina Foundation](https://www.bcbsncfoundation.org) is a private, charitable foundation established as an independent entity by Blue Cross and Blue Shield of North Carolina in 2000. Over the past two decades they have invested more than $190 million in North Carolina through nearly 1,300 grants, collaborations, and special initiatives. They operate under the mission to improve the health and well-being of everyone in North Carolina.

The staff at the BCBSNC Foundation set the intention of taking a more relational approach to their grant reporting processes to reduce the workload on grantees and facilitate strategic learning for both grant partners and the Foundation. This mindset shift led them to pilot and then implement a conversational reporting process which relies more heavily on conversations between Program Officers and grantees. A 60 minute Annual Learning Call takes the place of formal written reports; the process is outlined below:

**Process:**

* The Program Officer and the Director of Learning and Evaluation identify strategic learning questions to cover during the annual learning call.
* Annual Learning Call reminder emails are sent to grantees 30, 15, and 10 days before the due date.
* The Program Officer sends questions to grantees at least a week in advance of scheduled calls.
* During the call, the PO will ask pre-identified questions about:
	+ Progress towards outcomes: questions focus on biggest accomplishments and challenges.
	+ Strategic learning questions identified during approval process
	+ Feedback for the Foundation: questions about the grantee’s experience with the Foundation and how team can improve their work and processes
* The Program Officer captures notes from these calls, enters into the grants management system, and within one-week of the call, emails the grantee the notes to increase transparency, check the information gathered, and see if the grantee would like to provide any additional details.

**EXAMPLE IN ACTION: The Colorado Health Foundation (Private Healthcare Conversion Foundation)**

The Colorado Health Foundation is a private foundation focused on improving the health of Coloradans. They actively engage closely with communities across the state through investing, policy advocacy, learning and capacity building. In 2021, the Colorado Health Foundation awarded more than $113 million in grants and contributions to bring health in reach for all Coloradans.

The Colorado Health Foundation uses the Equitable Evaluation Framework as a starting point around how they evaluate the work of the Foundation as a whole. They always come to work with a questioning attitude. They ask themselves the following questions at the outset of any evaluation initiative:

* Who gets to make choices about this evaluation?
* Who is making meaning and drawing conclusions about the data?
* What is the focus of the evaluation?
* Which perspectives are prioritized and which are missing?
* Why are we answering this set of questions?
* Why are we choosing this particular methodology?

Kelci Price, Senior Director of Learning and Evaluation, talks more about why the questions are so important: “Some of our evaluations are actually not about the work, but about how we have understood the problem. We can execute all day, but if we got the question wrong, what are we really impacting?” She also added that bringing the right voices into the room plays a key role in the questioning process as well - you always want to include the folks who are ultimately affected by whatever it is that you are trying to impact, but think about how you make it worth your time and their time.

The most empowering thing that Kelci shared with me during our conversation was that “It was surprisingly easy to start making our evaluation practice more equitable. We didn’t need to spend months crafting a strategy. We found success by identifying small day-to-day ways we could align how we work and think with principles of equity.”

**Toolkit - Efficient and Effective Practices:**

* Funders should evaluate themselves and find what it is that’s motivating them, and what they’re actually doing about it. Do that first before even starting on the grant process.
* Take time for staff to unlearn what they’ve learned.
* Be careful about not attributing change–or lack thereof–to specific grants or grantees. This approach requires a realistic understanding of the complexity of social change and the myriad factors that influence the bigger picture.
* Seek out participatory evaluations. Invite grantee partners to help interpret the data and inform how it affects your grantmaking strategy.
* Always be mindful of the power dynamic that exists between funder and grantee.

**Five Commitments Funders Can Make**

1. Start with a values conversation - How is your organization operationalizing its values?

2. Build Relationships with your current grantees to meet them where they are and reduce the power dynamic.

3. Clearly communicate the types of projects you fund, give examples, and give feedback when an organization is not funded.

4. Include community voice in the grantmaking process.

5. Introduce a feedback loop that gives grantee partners, peer funders, and community members space to provide comments and perspective that will be used in creating an actionable strategy for the work.

**Reflections on Grantee Partner Survey Results from the Fellows**

“The survey results really made me think about how much our non-profit partners value transparency throughout the grantmaking process. I feel that we can do so much more to help make our funding priorities more clear upfront, so that organizations can truly determine funding fits before wasting time on an application. I was shocked at how much time our partners were spending on grant applications instead of doing the important work in our communities. In reviewing our application, it was clear that we could cut many questions and really drill down to what was most helpful to reviewers. We get so much more information about proposals from talking to grant seekers vs. the application anyway. It was also clear that reporting requirements were complicated and annoying. As the person who reads them, I agree. **There has to be a way to make these more useful and less burdensome for partners.** I think making some adjustments on our current processes will help non-profits feel heard and valued. A few key small changes we plan on making as a result include:

* Update our website to include funded grant proposal overviews (who do we fund and why) and our scoring rubric
* Cut most application uploads – have staff pull and save 990s, check Guidestar, etc.
* Cut application questions down to most essential for reviewers
* Allow for video/interview proposal submissions
* Collect reporting data through site visits and help partners use for social media/additional supporter outreach opportunities” **- Chloe Wiley**

“It was really valuable to hear directly from funders about some of the creative ways they are intentionally incorporating DEI into their grantmaking. **My key takeaway is that funders can learn much from each other. Community, family, private, and corporate foundations can all learn from each other’s successes and failures in this realm**. For example, the survey results pointed to a lack of inclusive outreach to prospective applicants, which results in a less diverse pipeline of potential grantees. This is a problem that we might easily overlook because we’re so used to promoting our grant programs in a particular way. The funders highlighted in this report have implemented new ideas to have a more targeted approach to outreach and are seeing great results. Any funder can experiment with these ideas and hopefully yield similar results.” **-** **Melissa Furr**

“After reviewing the results of the survey compiled by our group, specifically related to the application process, my biggest takeaway is **the need for personal interaction and relationship building between the funding organization and the grantee**. I think this would greatly reduce the amount of time a grantee spends working on an application. The relationship can also help the funding organization better understand accessibility to information needed in the application to find the best possible solution for compiling information with all stakeholders in mind. At The Cannon Foundation, we try to make the process less like a transaction and provide numerous touchpoints for the Program Officer and grantee throughout the process. Additionally, much of the ambiguity of the grant process can be eliminated as those relationships are built. **Program Officers learn the most when they are in person visiting the requesting organization.** We have sought to minimize the “paper” duties of the Program Officer so they can spend more time in the communities they are serving. The Foundation continues to analyze, and often reduce, the number of questions being asked. We are looking towards a more interactional Final Reporting process and trying to make changes with grantees’ time in mind.” **-** **Suzanne Philemon**

“The survey results revealed that there is no one-size-fits-all solution. Our grantee partners all have different needs and development levels. **What our partners need most is for funders to meet them where they are**. Does one grantee work best by submitting you data spreadsheets? Does another grantee work best by bringing you on-site and showing you the work in progress? Great! Both ways of reporting and showing progress are valid, and can provide great learning. Do you want to track something differently than they have historically tracked their work? No problem - provide them additional funding and technical assistance or staffing so they can adjust. Make sure the difficulty of the application and reporting process is commensurate with the grant amount. Be sure to ask your grantees often (and anonymously) what you can do to better serve them. **Communicate clearly the types of projects you are willing to fund** so that grantees don’t waste their time applying for a project you are not interested in funding. Allow grantees the opportunity to meet with you and have an idea session so you can map together if they are a good fit to apply for funding. Be open to learning about new innovations in funding to see if it may be a helpful avenue for you to try with your grantees.” **- Leah Jones-Marcus**

“The survey responses solidified what we already know – **inclusive voices reflective of the communities we serve are not included in establishing funding priorities, applications are too long and time consuming, grant reporting is too frequent, extensive, and there are not enough healthy, trusting relationships/partnerships between funders and organizations.** As long as I’ve been in philanthropy, funders have always talked about these things. **Most disheartening is that following the social justice movements of 2020 and during the pandemic, many of us had started implementing the changes that grantee partners wanted to see but have reverted to the old ways of grantmaking. We have always had the power to make changes, but we need a strong desire and will to ensure that equity is embedded in our policies, practices, and culture of our organizations.** My biggest takeaway from the survey results and interviews is that so much more can be done to give marginalized organizations and communities the attention, funding, support, and care they deserve. There needs to be huge leaps to make substantive and sustainable changes but taking immediate incremental steps will help jumpstart the process and build trust. As a result, we have committed to:

* Creating a more equitable application by performing due diligence research internally, removing application questions that don’t truly inform decisions, and offering flexibility on formats accepted
* Assessing the financial health of organizations based on where they currently are in their life cycles instead of prioritizing sustainability, risk, and suitability
* Including representatives of diverse communities in the development of funding priorities and grantmaking decisions
* Introducing a feedback loop that gives grantee partners, peer funders, and community members space to provide comments and perspective that will be used in creating an actionable strategy for our work” **- Aerial Ozuzu**

“I was quite surprised at the percentage of NPO's (21% of the sample set) who stated foundations were not collaborative at all in working with them to decide goals, strategies, and outcomes in their grantmaking programs. It asks the question who's driving the work? If the foundations are setting the agendas and the goals, it creates an apparent power imbalance. NPOs are then just tailoring their programs to fit the foundation's agenda and not the agenda that organically developed from the communities closest to the issues that create inequities. In deeper analysis, I would like to see if there are any correlations between the types of NPO's who answered not collaborative at all and the focus areas of the foundations they regularly interact with.

There is much room for learning when it comes to how clearly a foundation or a funder communicates their goals and strategies in their grant outreach, with close to 50% of the sample set answering that they are somewhat clear. What would it take for grantees to feel that they clearly understand goals and strategies before using time and resources to apply. I would think some equitable strategies to address this are webinars and information sessions where potential applicants can ask questions in real time. I do see this quite frequently with large national funders, however I would like to see the frequency of smaller, regional foundations in providing webinars or informational sessions. And if they are offered, how accessible are they to the applicants. For example, are they announced well in advance? Are they advertised over social media? or included in the RFP announcement? Is more than one session provided? Are the sessions recorded for prospective applicants to access if they could not attend?

A quarter of respondents indicated that funders are not involved at all with the development of grant proposals and applications. Over 50% are somewhat involved. This leaves me to wonder the specific level of engagement when funders are involved in grant proposals. For example, do the funders provide general workshops on developing a proposal? Do funders give feedback on proposals before submission?

Among respondents, most spend 11-20 hours developing a proposal. For a small grassroots organization that seems entirely too much time. Which leads to my question of what is being asked in the majority of grant applications. I can see how this might relate to how much time the funder 'invests' in the relationship between them and the grantee partner. Rather than using an application to discern alignment, discussions before hand and webinars might help elevate the need to ask questions that seek to find out if the grantee is the 'right fit' rather than just getting to the nitty gritty of the work they do, the issues they are addressing, and why their approach works and needs to be funded.

The vast majority of respondents (96%) say their foundation partners still collect written reports. I would have liked to learn a bit more about the average amount of time it takes to pull reports together and if they've experienced funders allowing the use of previously written reports created for other funders or for donors. Also what is being communicated to the grantee as to the uses of the grant reports that are received?

When asked “Is there any type of assistance that would be helpful to you when applying for funding?” a response that resonated with me was the request to not disqualify an applicant for an error. Reflecting on this, I often see grantees being 'weeded out' due to grammatical errors, or errors with uploading documents, and they are labeled as organizations who don't follow directions. However, it questions how equitable that might be for a funder to use syntax or grammatical errors as basis for disqualifications. There are a myriad of reasons that an error might occur, and although it might put extra work on the funder, it would be a more people-centered approach to reach out to grantees when errors are seen to allow them to correct it, if it interferes with the overall understanding of the proposal Errors doesn't mean organizations are less deserving of funding for the real world work that they do.” **- Wankeeta Jackson**

“The survey results really impressed upon me the need for grantmakers to continually revisit their grant giving. There’s been so much work and research done in this space, but it seems there is still a bit of a disconnect between funders and grant seekers. I was surprised to see how long organizations are spending on applications, while also acknowledging that many also utilize contract grant writers.

Over 80% of respondents to the survey indicated that they typically found grant opportunities by word of mouth. It creates the question - How are grantors spreading the word in the communities that need it the most?

The survey also made me go back and think about our applications. Numerous respondents commented that apps often ask the same questions in different words. 70% of respondents indicated that they have to research or go back through historical files to complete applications. Grant applications need to be more clear about what is being asked and why we are asking. My largest reflection and, something that was reiterated while doing research on equitable evaluation process is, over 60% of our survey respondents don’t receive feedback from funders about what was learned from their reporting. How can foundations disseminate this information to communities that were the most affected, and in an equitable way?” **- Tabinda Ghani**

“The survey results indicate that the **most beneficial part of the grant process is the** **interaction between nonprofit staff and foundation/funder staff. It builds or strengthens the relationship, brings greater clarity and understanding to what is being requested and how it aligns with foundation priorities, and creates an opportunity for further dialogue to break down the inherent power dynamic.** I think we found through our Capstone group discussions that foundation program staff also see great value in the interactions we have with current and potential grantees. So, why can’t we put more time and effort into the relationship building aspect of the grant review process? Whether an organization is funded or not, the time is valuable because it creates or builds a relationship. One of the survey respondents best captured the answer to this question:

*Wanting outcomes is understandable, however, most grants are 1-3 years, so for those of us*

*who are engaged in relational, complex, systemic-change work, we have to operate with a*

*relational mindset in the actual work that we do. However, grantmakers often lean toward a*

*more industrial mindset with timelines and benchmarks that don't take into account the*

*relational nature of large scale social change. We have to walk a fine line between "what can*

*we quantify in order to put in a report" and "what relationships we need to develop that can*

*then be leveraged to create change." The latter doesn't fit in most grantmakers reporting*

*mechanisms. The former is more about short-term, but the latter is about long-term.*

Foundations that want to work in the areas of system change will first need to disrupt their own system in order to lead the way for change. External systems change should be secondary after deconstructing the box that already exists in many foundations. That takes time. The bright spots are that we can make incremental change along the way by:

* Reducing the number of questions to only those necessary / removing repetitive questions
* Ensuring that the amount of time spent completing the application matches the anticipated grant dollar amount
* Providing more substantial communication, clarity, and transparency around funding priorities, fit and likelihood of funding, and feedback on why a grant was not funded
* Stating the odds of a grant request getting funding (i.e., We receive approximately X number of applications, and typically fund X number of organizations at X amount)
* Matching reporting requirements to the size and nature of the grant and be creative in how we might conduct reporting, especially if we are more in the grant monitoring space vs. grant evaluation
* Creating feedback opportunities when we don’t have them, and if we do, then report back what we learned from feedback requested (54% of nonprofit respondents said funders do not report back)
* Collaborate to find solutions to shared challenges that arise during the grant period and beyond
* See our role as more than a funder and instead a builder and sustainer of the work” **- Ashley Whitt**

**Appendix**

**Thank you**

Thank you to the following people who spoke with us as we researched these topics:

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* Rena Payan, Director of Grantmaking, Justice Outside
* Lasinra Webb, former Grants Manager, The Blue Cross and Blue Shield of North Carolina Foundation
* Sarah Smith, Director of Learning and Evaluation, The Blue Cross and Blue Shield of North Carolina Foundation
* Michelle Bidwell, Granted Advisors
* Isabel Barrios, The Greater New Orleans Foundation
* Brittney Gaspari, VP Community Investment, Winston-Salem Foundation
* Ramona Dallum, VP Equity & Impact, Community Foundation of Louisville
* Shannon Coyne Rosado - Nielsen Foundation
* Lara Federov - Medtronic Foundation
* Keva Wombal, (formerly) Senior Vice President & Director, Community Programs, Foundation For The Carolinas
* Elizabeth Trotman, Senior Vice President, Civic Leadership Programs and Initiatives, Foundation for the Carolinas
* Robert Killins, Jr.Director of Special Initiatives, Greater Cincinnati Foundation
* Samuel Jackson, VP of Programs and Grants, The Healing Trust

[Grantee Feedback Survey Template](https://docs.google.com/document/d/1-YTHCm6lid6pKkzF9BKL8lpzlhhp3pPOrMgR0mC5Wys/edit?usp=share_link)

[Practical Guide to Equitable Grantmaking Strategies Survey Responses.pdf](https://drive.google.com/file/d/1WEnXfle7XT6WGMlW9TlIl_-x97zjbHrr/view?usp=sharing)

**Reference Articles/Readings/Books:**

* [Measuring Social Change](https://www.sup.org/books/title/?id=27990) by Alnoor Ebrahim
* [Center for Evaluation Innovation](https://www.evaluationinnovation.org/) - thoughtful posts and webinars (they include recordings of past webinars on their website)
* [Equitable Evaluation Initiative](https://www.equitableeval.org/framework) - this is a group focused on shifting the evaluation paradigm to one which centers equity
* [A Shift Toward Equitable Evaluation Means Starting Small](https://cssp.org/2019/10/a-shift-toward-equitable-evaluation-means-starting-small/) by Kelci Price
* [The Casey Foundation’s Journey Toward Equitable Grantmaking](https://www.peakgrantmaking.org/insights/the-casey-foundations-journey-toward-equitable-grantmaking/?utm_source=PEAK+Grantmaking&utm_campaign=a93167dc22-peak-weekly-6-17-22&utm_medium=email&utm_term=0_c620ac67b2-a93167dc22-479084438&mc_cid=a93167dc22&mc_eid=2682f60808) by Katie Tetrault
* [Learning and Unlearning: Centering Equity in Our Evaluation Practice](https://coloradohealth.org/insights/good-health/learning-and-unlearning-centering-equity-our-evaluation-practice) by Kelci Price
* [Centering Equity through Flexible, Reliable Funding](https://www.geofunders.org/resources/centering-equity-through-flexible-reliable-funding-1371) by Grantmakers for Effective Organizations
* [Change Leaders in Philanthropy: A Conversation with Rebecca Cisek of Bainum Family Foundation](https://www.geofunders.org/about-us/perspectives/198) by Grantmakers for Effective Organizations
* [Demystifying Grantmaking Transparency and Compliance](https://www.peakgrantmaking.org/insights/demystifying-grantmaking-transparency-and-compliance/) by David Hazeltine
* [Glasspockets by Candid](https://dev.glasspockets.org/openforgood) - Featuring the voices of "knowledge sharing champions" from across the field, exploring new tools, practices, and examples showing how foundations are opening up about what they are learning and sharing that knowledge for the benefit of the philanthropic sector, and for the greater good.
* [Kresge Foundation’s Strategic Learning, Research & Evaluation](https://kresge.org/our-work/strategic-learning-research-evaluation/)
* [Three Ways to Operationalize Trust-Based Philanthropy Practices](https://www.peakgrantmaking.org/insights/three-ways-to-operationalize-trust-based-practices/?utm_source=PEAK+Grantmaking&utm_campaign=96ef70f730-monthly-july-2022&utm_medium=email&utm_term=0_c620ac67b2-96ef70f730-479084438&mc_cid=96ef70f730&mc_eid=2682f60808) by Malila Becton-Consuegra, Brandi Howard, Elaine Mui, Daniel Oviedo
* [Expanding the Scope of Trust-Based Philanthropy: How Funders are Helping Reshape Learning & Evaluation](https://www.trustbasedphilanthropy.org/blog-1/7-7-22-expanding-the-scope-of-trust-based-philanthropy) by Jazmin Segura, Fund for an Inclusive California and Maricela Piña, MPH, Community Centered Evaluation & Research
* [Transforming Our Evaluation Practice: Examples and Case Studies](https://coloradohealth.org/insights/good-health/transforming-our-evaluation-practice-examples-and-case-studies) by Kelci Price
* [The Data Equity Framework](https://weallcount.com/the-data-process/) by We All Count
* [*Shifting Relationships with Grantees: Advancing Trust-Based Philanthropy through Emergent Learning*](https://drive.google.com/drive/folders/1ZJO72ak4YonodHLIPTg2O8A_EaGzY16t) by Brittney Gaspari, VP Community Investment, Winston-Salem Foundation
* Engage R+D, a learning and evaluation firm based in CA, recently released a [field guide](https://www.engagerd.com/feature/el-foundations) for Learning and Evaluation staff at Foundations. As you think about changes at your organization, you may find some of their info helpful. Particularly their framing of “polarities.”