



CENTERING COMMUNITY VOICE

A BLUEPRINT FOR INCORPORATING LIVED EXPERIENCE INTO THE GRANTMAKING PROCESS

United Way for Southeastern Michigan and Detroit Future City

Spring 2021

DETROIT
FUTURE
CITY

 National Fund
for Workforce Solutions

United
Way 

United Way
for Southeastern Michigan

CONTENTS

Acknowledgments	2
Foreword from United Way for Southeastern Michigan	5
Introduction	6
Lived experience	7
Why lived experience?	8
Who should use this blueprint?	11
When should you use this blueprint?	11
Where to instill lived experience into your process	12
<i>In your operations</i>	13
<i>In your grantmaking</i>	14
Guiding principles for centering lived experience	15
<i>Detroit Champions for Hope: A story from a local initiative</i>	17
<i>Levels of engagement for incorporating lived experience</i>	18
Centering community voice toolkit	20
Additional tools and resources	47

ACKNOWLEDGMENTS

Developing this report involved a research effort that included conducting a national scan of literature, models, and toolkits centered on equity, justice, and inclusion, along with conversations with practitioners, community-based organizations, and southeastern Michigan residents. The expertise of these subject matter experts and people with lived experience enriched this blueprint. We are grateful for the time, passion, and knowledge shared with us from Wende Randall and Emily Madsen - Kent County Essential Needs Task Force; Julie Quiroz, Jan Jaffe, and Sindhu Knots - Grantmaking with a Racial Justice Lens; Kip Holley - Kirwin Institute for the Study of Race and Ethnicity; Cynthia Gibson - Cynthesis Consulting; Kathryn Firmin-Sellers - United Way of Central Carolinas; Lisa Machesky - Oakland Literacy Council; Furqan Khaldun - Hope; Starts Here Detroit Champions for Hope; University of Michigan Employment Equity Learning and Action Committee; United Way for Southeastern Michigan former and current staff; a host of staff from community-based organizations in southeastern Michigan; and southeastern Michigan residents who shared their lived experience: Anika H., Clare C., Bertha M., Tommara G., Karen H., Lakila S., Pamela T., Stephanie J., Tommie O., and a host of other organizations and residents that took time to complete surveys.

This report, jointly funded by the National Fund for Workforce Solutions and the Detroit Regional Workforce Fund, was prepared by Detroit Future City on behalf of United Way for Southeastern Michigan.

United Way for Southeastern Michigan

The mission of United Way for Southeastern Michigan is to mobilize the caring power of Detroit and southeastern Michigan to improve communities and individuals' lives in measurable and lasting ways.

We Live United for universal success and prosperity in southeastern Michigan. To that end, we work with public, private, and nonprofit partners to help families become stable and ensure children have the support they need to thrive.

[Learn more at **UnitedWaySEM.org/**](https://www.unitedwaysem.org/)

Detroit Future City Center for Equity, Engagement, and Research

Detroit Future City (DFC) is a nonprofit organization that plays a crucial role in Detroit as an independent think tank, policy advocate, and innovation engine focused on the future of the city and the implementation of strategies that advance the recommendations laid out in the Strategic Framework, a shared vision for Detroit's future that resulted from a robust citywide public engagement effort. DFC is committed to advancing the quality of life for all Detroiters.

With equity and engagement as two guiding principles, DFC's new division, the Center for Equity, Engagement, and Research, continues to build upon DFC's research portfolio of publications and special reports, which provides up-to-date information to residents and key stakeholders.

[Learn more at **DetroitFutureCity.com.**](https://www.detroitfuturecity.com/)

CENTERING COMMUNITY VOICE: A BLUEPRINT FOR INCORPORATING LIVED EXPERIENCE INTO THE GRANTMAKING PROCESS

PROJECT TEAM:

United Way for Southeastern Michigan

Jordan Falby

Rachel Gallagher

Detroit Future City

Shari Williams

Sema Abulhab

Drew Irwin

Madeleine March-Meenagh

Design and Editorial Support

Ashley Williams Clark

Edward Lynch

Cities Reimagined

Mpowrd Analytics, LLC

Van Dyke Horn Public Relations

Graphic Design

Alex Johnston

Colin Mealey

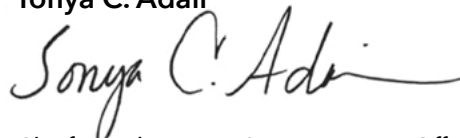
FOREWORD

United Way for Southeastern Michigan is pleased to share Centering Community Voice: A Blueprint for Incorporating Lived Experience into the Grantmaking Process - a set of recommendations, tools, and action steps for funders and other community organizations who are committed to more equitable grantmaking. United Way received support from the National Fund for Workforce Solutions to create this blueprint, which provides tools for centering equity in both existing and future programming and systems-change work, with a particular focus on incorporating lived experience. It is the culmination of extensive research of best practices from around the country, conversations with United Way staff and partners, and focus groups with community-based organizations and community members with lived experience.

The intent of this blueprint is to bring awareness to the need for the voice of the community to be centered in our work; to provide tools for grantmakers to begin examining current processes and practices; and to describe key actions for organizations to move equity work

forward. United Way strongly believes that equity should be the foundation of community investments. Our commitment to practices that disrupt unfair systems and provide access to opportunity for all is one of our guiding principles; it is central to our work and embedded in our investments. We recognize that a key component of this equity work is seeking out, valuing, and incorporating the voice of the community into grantmaking. It is one of the most effective ways to better understand and effectively respond to community needs, strengthen relationships, and achieve lasting impacts. Ultimately, we hope that this blueprint and the tools it provides will inspire and encourage grantmakers to continue the pursuit of more equitable grantmaking practices and, as a result, deeper and more meaningful impacts in the communities they serve.

Tonya C. Adair



*Chief People, Equity & Engagement Officer
United Way for Southeastern Michigan*

INTRODUCTION

Inequities are part of a complex, deeply rooted legacy of oppression and discrimination that continues to permeate all facets of society. Funders across the country work diligently to address these inequities through their grantmaking, yet economic prosperity consistently continues to be merely a dream for millions of Americans. It is time to advance the way grantmaking is done to better meet the needs of the communities that funders seek to serve through their philanthropy and financial contributions.

Incorporating lived experience through an equity lens within your organization, and at all levels of the grantmaking process, is an important and effective way to support system changes, shift power dynamics, and ultimately move individuals in underserved communities closer to having their basic needs met long term and to reducing the inequities that exist.

Developing this blueprint involved conducting a national study of literature and toolkits centered on equity, justice, and inclusion, along with conversations among practitioners, community-based organizations, and southeastern Michigan residents with lived experience.

This blueprint begins by introducing a basic framework, which includes context from research and people with lived experiences. The framework describes the need for centering community voice and highlights opportunities throughout the grant cycle for incorporating lived experience. Following the framework is a user-friendly toolkit that includes four short organizational assessments and a list of tools. The four short assessments will help your organization evaluate where you are on your journey and includes space to create an action plan towards advancing inclusive practices within your organization by incorporating lived experience. The library of tools follows the assessment and action plan section to support you with navigating the road ahead.

LIVED EXPERIENCE

Lived experience describes the expertise that comes from a person's past or present experiences; this level of expertise provides context to a given issue. People with lived experience are also called context experts. Lived experience makes individuals distinctively equipped to understand the unique challenges of their communities and therefore what is needed to make resources and processes more equitable.

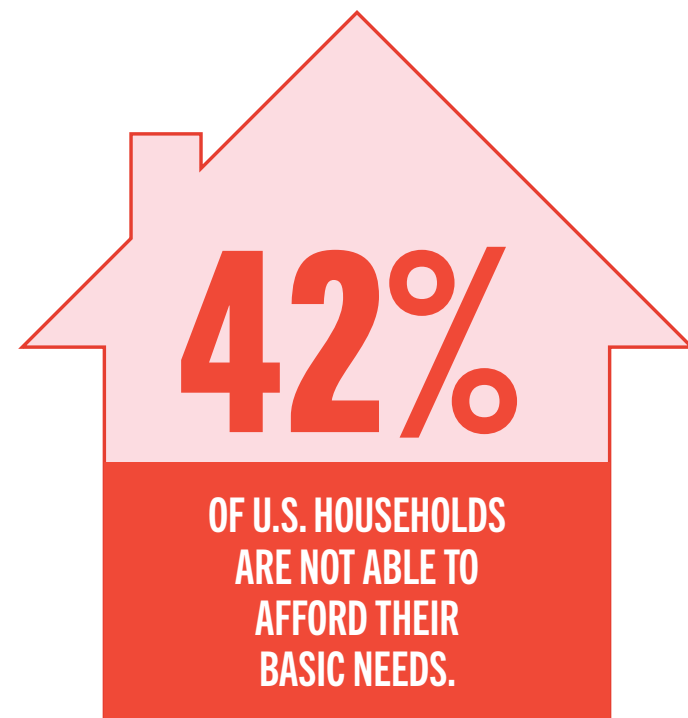


WHY LIVED EXPERIENCE?

To affect long-term and sustainable movement toward equity in grantmaking, systemic issues must be acknowledged and solutions must address underlying biases and power dynamics. For example, place-based health outcomes and job opportunities can still largely be determined by race and ethnicity, as people of color have had less choice in where they live and which jobs they can pursue.¹³ Centering lived experiences in the grantmaking process strengthens community agency and power to disrupt the systems of oppression that hinder people's capacity for reaching economic prosperity.

In 2018, of the 121 million households in the U.S., 51 million could not afford basic necessities of housing, childcare, food, transportation, health care, a smart phone plan, and taxes. This includes 16 million who were living in poverty, meaning they earned below the Federal Poverty Level (FPL) and 35 million that were Asset Limited, Income Constrained, Employed (ALICE).¹⁵ In 2020, the COVID-19 pandemic exacerbated these disparities, reducing opportunity for economic advancement for many.

Households in the ALICE population are our friends, our neighbors, our children's teachers, and frontline workers who risk their lives to keep us safe and healthy¹³. Their experiences matter and should be incorporated into the very programs and grants intended to serve them.



WHY LIVED EXPERIENCE? (CONTINUED)

In Metro Detroit, there are approximately 1.8 million jobs, with the number of jobs in the region growing steadily since 2010. However, there are still fewer jobs than in 2001¹⁸, and 61 percent of jobs in Michigan pay less than \$20 per hour¹³. There is a substantial premium for those with a four-year degree. The median four-year degree holder in Metro Detroit makes \$32.68 per hour compared to \$17.58 for those without one¹⁰. With new jobs being largely low-wage, wealth and health gaps continue to increase. In 2019, there were more than 1.5 million Michigan households – nearly 40% of households in the state – living below the ALICE threshold which is the the average income that a household needs to afford the household basics defined by the Household Survival Budget for each county.”¹⁵ A disproportionate percentage of these households are Hispanic (48%), Black (60%) and single-headed households with children (73%)¹³.

The Michigan Department of Labor and Economic Opportunity (LEO) points to several economic challenges that hinder people’s ability to reach self-sufficiency. They are:

- **Economic mobility has stalled:** Although the economy is strong, prosperity is not widely shared across various demographic groups.
- **Skill and credential gaps persist despite available jobs:** Good jobs require learning after high school.
- **Too many people face non-skill barriers to opportunity:** Poverty and systemic barriers prevent many from being able to move up the career ladder.
- **The talent pool isn’t growing fast enough:** Michigan faces more potential decline in population by 2030.
- **Future economic shifts pose threats to families:** Michigan is highly exposed to automation and recession, with 42% of Michigan jobs projected to be at least partially automatable by 2040.
- **The ecosystem is not generating enough economic growth:** Failure to translate R&D investment into growth and employment.²⁵

WHY LIVED EXPERIENCE?

The fundamental goal of grantmaking is to support the ability of nonprofits to make progress on complex issues within communities. Grantmakers work hard through their philanthropy to combat the inequities that stifle opportunity and justice. Yet, at the same time, funders are frequently contributing to those inequities through grantmaking practices that control the accumulation of wealth and its distribution in communities, in many cases hindering a nonprofit's ability to produce social goods that truly meet the needs of the community and support systems change. Fully, deeply, and equitably incorporating lived experience first requires reckoning with these trends and challenges, both locally and nationally.

Now is the time for funders to refine grantmaking approaches to better meet the needs of community members by incorporating lived experiences into the grantmaking and decision-making processes. This includes residents and staff within community-based organizations (CBO). In doing so, funders will design better programs and solutions that close systemic gaps and drive opportunities for economic mobility.

"The lack of incorporating voices on the ground is why systems are essentially broken. When we start aligning solutions to on the ground experience, we strengthen systems and better meet the needs in the community."

– Anonymous community resident

"The value of incorporating lived experience into grantmaking and decision making is the chance for a more just and equitable society."

– Stephanie J., community resident

WHO SHOULD USE THIS BLUEPRINT?

Operationalizing lived experience to ensure equitable grantmaking processes is an iterative process that can start at any point within the organization. Although organizational leaders may typically set the precedent, staff should also acknowledge that they too have the power to move the organization towards equity and inclusion.

This blueprint is primarily intended for boards, leadership, and staff across departments to guide their efforts to better incorporate lived experiences throughout the grant-making process. The toolkit portion of this document provides flexible framing and exercises that may also be useful for community based organizations (CBO) in their efforts to better incorporate and leverage context experts.

WHEN SHOULD YOU USE THIS BLUEPRINT?

The short answer: as much as you can! This blueprint is intended to move you closer to creating a more equitable and long-lasting impact in the communities you serve. Users of this blueprint may find that it requires you to ask difficult questions, grapple with complex problems, and foster creative solutions. It is OK to get uncomfortable on your journey; just remember that any step made is considered progress, and continuous progress takes you closer to your goal. Small steps can catalyze further conversation and larger actions. They are a necessary and worthwhile contribution in and of themselves and as part of continued equity work.

“Funders, nonprofits, and government agencies need a guide like this. Often we as residents feel like organizations and government agencies are only coming to us as a checkbox. Our perspectives, experiences, and input is not really valued.”

– Karen. H., community resident



WHERE TO INSTILL LIVED EXPERIENCE INTO YOUR PROCESS

For most funders, grant-making processes and practices vary across departments and programs. That is why lived experience should be incorporated into both your organizational values and operations as well as within grant-making processes. Doing this helps to ensure that, despite tight grant deadlines or program parameters, community voice is central and integrated.

During community-based organization (CBO) focus groups, when asked, “What do you think funders could do better to have more equitable grant processes and improve the ways they are incorporating lived experience?” CBOs expressed a desire to see funders dedicate staff to community engagement and implement participatory practices that involve community members in various parts of their processes. They noted a lack of people of color in decision-making roles and offered suggestions for improving how they can more authentically engage people with lived experience. Some of those suggestions included:

- *Co-designing and co-learning with community panels of residents and CBOs to inform policies, priorities, and processes.*
- *Find talent in the communities you serve to sit on your board and join your staff.*
- *Look internally to understand how your staff demographics reflect the community and pay attention to who is receiving your funds most often. Do those organizations reflect the communities in which they serve?*

IN YOUR OPERATIONS

Operationalizing lived experience, which is instilling lived experience into your organizational values and operations, requires deliberate measures that “drive inclusive behaviors and actions into the organization at the group, team, and individual level to identify both the positive behaviors and the biases/resistances that may prevent inclusion from flourishing.”²⁷ People with lived experiences should be reflected in your board and on your staff. Increasing the number of context experts on boards and in staff is an appropriate step towards operationalizing lived experience. Recruiting context experts for board or staff positions may require your organization to leverage new and existing community relationships and existing staff with lived experience to bridge connections that will support your outreach efforts.

The board, along with the organization’s leadership, has a vital responsibility to build the foundation that will support operationalizing lived experience, which includes building in protocols and policies that monitor and track advancements in the organization’s culture of practice. **See Operations Tools in the Additional Resources Section.**

“I’d like to see funders lower barriers and become more inclusive as to who qualifies for funding”

– Tommie O., community resident

“Grantors want a fully fledged program from the get-go that will be effective but it takes some time, experimentation, system building, refinements, and yes, failures to make a program good and effective. This means investing for the long haul and recognizing that we move an ecosystem forward when we are allowed to learn from our failure. Our current system of funding leaves so many nonprofit leaders feeling like failures and then they leave the sector, but it is those leaders we need to invest in because they will build better organizations next time.”

– Lisa M., Executive Director
at Local Nonprofit

IN YOUR GRANT-MAKING

Centering community voice throughout the grant-making process creates an opportunity to combat power imbalances among foundations and nonprofits and people with lived experience. This shift in grant-making shares power with context experts, giving them agency to change systems and produce more equitable outcomes in their community. Funders should instill lived experience throughout the entire grant-making process, which includes three primary stages: **pre-grant, granting, and post-grant**. At each stage, there is the opportunity to incorporate lived experience, which may inform outcomes, funding priorities, distribution plans, and overall impacts.

“I shouldn’t need to chat with a CPA and a nonprofit lawyer to understand how to fill out the application and/or where to find how to apply to the grant. It’s hard enough to be black, a woman, a founder of a grassroots nonprofit that’s already not funded broadly because of systemic racism - can someone cut us a break already?”

– Vic B., Executive Director of local nonprofit

“Funders need to include us throughout the entire process, But most importantly during the pre-grant stage.”

– Clare C., community resident



GUIDING PRINCIPLES FOR CENTERING LIVED EXPERIENCE

Authentic engagement is described as “the intentional process of co-creating solutions in partnership with people who know best, through their own experiences, the barriers to opportunity. This is grounded in building relationships based on mutual respect that acknowledges each person’s added value to developing solutions together.”⁴ When authentically engaging people with lived experience, remember to embrace them as experts, respect their power, give them credit and refrain from tokenizing or sympathizing with them.

Being a champion for authentic engagement activities occurs throughout various levels of your internal processes, including when you are engaging people with lived experience or community-based organizations (CBOs), or evaluating the CBOs’ approaches to involving context experts as well. The five principles on the following page should guide you in being a champion of authentic engagement activities.



GUIDING PRINCIPLES FOR CENTERING LIVED EXPERIENCE (CONTINUED)

1. BE OPEN, TRANSPARENT AND RESPONSIVE

Be open, honest, and vulnerable when engaging people with lived experience to maintain relationships that are rooted in trust and shared accountability. Modeling openness signifies to the people you are engaging with that they can show up more fully and genuinely.²⁶

2. SOLICIT AND ACT ON FEEDBACK

When obtaining input from those individuals with lived experience or CBOs, “acknowledge and affirm” by sharing what you heard, explaining how the feedback will impact your actions, and following through on those actions. This helps to strengthen trust and create accountability.²⁶

3. HIGHLIGHT THE STRENGTHS OF THE COMMUNITY

Highlight the strengths of the community or organization rather than its needs. This process, known as asset mapping, will help your organization unlock and activate the full potential of community spaces, community leaders, and business partners that can help support ongoing engagement. Asset mapping also fosters mutual accountability and creates environments of engagement that are accessible and hospitable for all.¹ See the Asset Mapping Tool on page 45 to facilitate this approach.

4. BE AWARE OF YOUR BIASES

“Unconscious biases are the implicit positive or negative preferences for things, individuals, or groups shaped through our individual experiences.”³ These biases may lead you to make decisions or judgments about someone’s abilities, competence, or experiences that are untrue to that person or group.³ Be aware of your biases before engaging to reduce the chance groups and individuals are left out of funding opportunities or that they feel tokenized. Establish internal practices to prevent unconscious bias from trickling into your work and how funds are distributed. See the Implicit Bias and its Role in Philanthropy and Grantmaking Tool in the Additional Resources section on page 47 for a list of interventions that may support you and your team.

5. BE GENUINELY INCLUSIVE

Being genuinely inclusive requires “listening with attention, addressing concerns in ways that are relevant to the community, framing engagements in terms of shared values and opportunity, and cultivating a sense of belonging. This is important, especially, in communities with long histories of distrust, disaffection, and disenfranchisement between community members and established institutions of power, such as schools, police departments, or local governmental bodies.”⁹

DETROIT CHAMPIONS FOR HOPE: A STORY FROM A LOCAL INITIATIVE

“Parent and Caregiver Engagement team started our engagement with a focus on parent-serving organizations , parents, caregiver, child care providers, and community members towards creating an early childhood advocacy network. The participants quickly let us know the network needed to include engagement and advocacy because families must be engaged to be able to advocate. The community also indicated the network should be made up of at least 50% parents and caregivers, as the priorities needed to be created for and by parents and caregivers.

Listening and following parent/community voice began the process of building a parent engagement and advocacy network, complete with an infrastructure that paid parents and caregivers for their expert contributions to outreach, engagement activities, and advocacy efforts. Community voice led to us switching from three geographic areas of focus (called HUBS at the time) to seven areas, aligned with the seven City Council districts of Detroit. The new infrastructure created opportunities for participants to build their resumes and get paid for their time, while leveraging their perspectives and experiences to engage more hard-to-reach families in making real change for all of Detroit’s children.

Because our team members are paid more than \$16 an hour, many have been able to secure reliable transportation, buy homes, secure better housing, purchase appliances, and increase their overall standard of living for themselves and their families. This has been critically essential during the pandemic.

Funders and CBOs must do a better job of truly including people with lived experience, specifically those most impacted by the program, policy, system or service to be created/delivered. Feedback for a strategy created without them is insufficient. Rather co-creation in the beginning with continuous engagement and updates throughout is essential for true impact.

Take the time to hear, value, and integrate the community voice. They may not express things the way you would, but their lived experience is expertise that should be valued and compensated for.”

– **Furqan Khaldun**

*Family Engagement & Advocacy Co-Coordinator
Hope Starts Here, Detroit Champions for Hope*

LEVELS OF ENGAGEMENT FOR INCORPORATING LIVED EXPERIENCE

Proven engagement tactics fall into three categorical levels of participation: **co-learning, co-designing, and power-sharing**. Tactics that include co-designing and power-sharing activities tend to involve people with lived experience more intimately and have the most transformative potential. Marginalization should be avoided, and informing should be combined with a deeper level of engagement that involves people with lived experience.

“Listen to us, and take our suggestions into consideration. Don’t just engage us to say that you’ve engaged the community.”

– Lakila S., community resident



LEVELS OF ENGAGEMENT FOR INCORPORATING LIVED EXPERIENCE (CONTINUED)

Levels of Engagement and Approaches					
Level of Engagement	Marginalization <i>(excluding)</i>	Informing <i>(one-way communication)</i>	Co-learning <i>(feedback, input, consulting)</i>	Co-designing <i>(involving, advising, and consulting)</i>	Power-sharing <i>(collaborating, agenda-setting, and decision-making)</i>
Description	Excludes certain populations from decision making and creates barriers to participation. ⁷	This involves one-way communication out to the community to provide objective information.	This is a two-way exchange that establishes transparent dialogue and a feedback loop that offers the community an opportunity to provide input on plans or concepts, plans, or analysis.	This is a two-way exchange that strengthens peer networks and contributes to sustainable programs and initiatives. Community members are involved throughout processes and their input is integrated into plans.	This is a two-way exchange that creates a strong, long-term bond between an organization and the community by integrating the community in decision-making processes and placing decisions in their hands.
Example Activities	<ul style="list-style-type: none"> Developing funding opportunities based on assumptions Over-relying on previous relationships or a good history with certain organizations Not taking time to identify who is missing 	<ul style="list-style-type: none"> Newsletters Emails Websites Webinar presentations 	<ul style="list-style-type: none"> Focus groups Asset mapping Learning communities 	<ul style="list-style-type: none"> Advisory boards and councils Workshops Working groups 	<ul style="list-style-type: none"> Participatory budgeting Participatory grant-making



CENTERING
COMMUNITY VOICE
TOOLKIT

ASSESSMENTS AND TOOLS

This toolkit provides user-friendly assessments and tools to support funders on their journey to improving the ways in which they incorporate lived experience in the grant-making process.

The assessments are fillable forms that your organization can use to assess where the organization is on its journey to incorporating lived experience. Each assessment identifies tools to support you on your journey and includes space to list out goals, action steps and ways you intend to connect your actions to the outcomes you wish to see. The assessments can be done alone, but are most impactful if filled out and discussed among your team, board, or the entire organization. These assessments will help you examine four areas:

OPERATIONS

PRE-GRANT

GRANTING

POST-GRANT

Following the assessments are tools that your organization can implement to better incorporate lived experience. In addition to the tools provided in this blueprint, there are a plethora of additional tools and resources that can be accessed online. A condensed list of some of these tools and resources is included in the **Additional Tools and Resources** section.

Consistent, continual steps towards your goal will yield positive results for your organization and those you seek to serve. As you proceed on this journey, be clear about the value of this work for you, be a champion for authentic engagement activities, and build in time to check in on your progress and assess your next steps.

YOUR ROADMAP TO CENTERING COMMUNITY VOICE

Operations	Pre-grant	Granting	Post-grant
<p>Operationalize internal practices to strengthen commitment to incorporating lived experience among board members and staff.</p>	<p>The period within the grant-making process where the funder is setting priorities, determining equity metrics, and preparing their grant opportunity.</p>	<p>The period within the grant-making process where the funder is ensuring there is a diverse applicant pool, providing necessary assistance, and developing an inclusive review board.</p>	<p>The period within the grant-making process where a funder is incorporating qualitative feedback and assessing the impact of their grants to inform the next grant cycle.</p>
Indicators and Considerations			
<ol style="list-style-type: none"> 1. Board commitment 2. Board structure 3. Hiring practices 4. Performance measures 	<ol style="list-style-type: none"> 1. Evaluate grant pipeline 2. Engage unfamiliar CBOs 3. Involve community members setting funding priorities 4. Develop RFPs that are centered on lived experience 5. Spend time in communities you seek to support 6. Simplify and streamline the grant process for grantees 	<ol style="list-style-type: none"> 1. Inclusive decision board 2. Technical assistance and office hours 3. Disseminate RFPs to unfamiliar, under-resourced, or grassroots groups 4. Support indirect costs and unrestricted funding 5. Provide multi-year support 6. Support grantees after the check 	<ol style="list-style-type: none"> 1. Collect qualitative data 2. Assess program metrics to promote system change 3. Hold close-out meetings with grantees and people with lived experience
Tools			
<ul style="list-style-type: none"> • Comprehensive tools • Navigating difficult Conversations • Participatory grantmaking • Trust-based philanthropy project • Who is at your table? 	<ul style="list-style-type: none"> • Asset mapping • Community engagement • RFP tool • Site visit • Unconscious bias • Who is at your table? 	<ul style="list-style-type: none"> • Asset mapping • RFP tool • Unconscious bias • Who is at your table? 	<ul style="list-style-type: none"> • Community engagement • Data • Empathy map • Trust-based philanthropy project • Who is at your table?

BEGIN WITH AN ASSESSMENT AND ACTION PLAN

Using the following scorecards, assess your progress toward centering lived experience in your grant-making practices before using the tools in the toolkit. There are four scorecards, one for each pillar on the roadmap:

- 1** OPERATIONS
- 2** PRE-GRANT
- 3** GRANTING
- 4** POST-GRANT

OPERATIONS

CENTERING LIVED EXPERIENCE ASSESSMENT

Scoring Descriptions

0 = not achieved, no activity/involvement

1 = minimal achievement or involvement

2 = making progress, noteworthy achievement, or involvement

3 = fully achieved or integrated

Indicator	Where are we now? (Score)	What tool can help us get there?
1. The board and organizational leadership value lived experience and believe that incorporating lived experience in the grantmaking process is relevant and valuable.		<ul style="list-style-type: none"> • ABFE's responsive philanthropy in black communities • Empathy map • Navigating difficult conversations • Site visits
2. A commitment to incorporating lived experience is reflected in the strategic priorities of the organization, in the mission statement, and/or the organizational values.		<ul style="list-style-type: none"> • Empathy map • Navigating difficult conversations • Operations tools
3. People with lived experience serve on our organization's board.		<ul style="list-style-type: none"> • Operations tools • Who is at your table?
4. People with lived experience make recommendations to the board and inform board decisions (e.g. through an advisory committee).		<ul style="list-style-type: none"> • Asset mapping tools • Community engagement tools • Unconscious bias tools
5. We incorporate lived experience as part of performance measures within our organization.		<ul style="list-style-type: none"> • Operations tools
6. We hire people on our staff with lived experience.		<ul style="list-style-type: none"> • Operations tools • Who is at your table?

OPERATIONS ACTION PLAN

Goals:	
Actions steps:	
Anticipated barriers:	
Approach to address barriers:	
How often will we revisit this plan:	

PRE-GRANT CENTERING LIVED EXPERIENCE ASSESSMENT

Scoring Descriptions

0 = not achieved, no activity/involvement

1 = minimal achievement or involvement

2 = making progress, noteworthy achievement, or involvement

3 = fully achieved or integrated

Indicator	Where are we now? (Score)	What tool can help us get there?
1. Staff spend time in the communities being served through our grant-making to establish relationships and bridge connections.		<ul style="list-style-type: none"> • Community engagement tools • Comprehensive tools • Site visits
2. Funding priorities are identified with the priorities of community agencies or individuals with lived experience.		<ul style="list-style-type: none"> • Community engagement tools • Participatory grantmaking tools • Who is at your table?
3. We take time to learn the ecosystem and identify under-resourced and grassroots organizations that could be served through our grant-making.		<ul style="list-style-type: none"> • Community engagement tools • Mapping assets and engaging community
4. We have simple and streamlined grant processes that are transparent and easy to access.		<ul style="list-style-type: none"> • Designing equitable grant opportunities and review processes • Operations tools
5. We engage people with lived experience in the development of our grant opportunities.		<ul style="list-style-type: none"> • Designing equitable grant opportunities and review processes • Unconscious bias tools • Participatory grantmaking tools
6. We evaluate our grant pipelines to ensure unfamiliar or grassroots have access to our grants.		<ul style="list-style-type: none"> • Designing equitable grant opportunities and review processes • Unconscious bias tools

PRE-GRANT ACTION PLAN

Goals:	
Actions steps:	
Anticipated barriers:	
Approach to address barriers:	
How often will we revisit this plan:	

GRANTING

CENTERING LIVED EXPERIENCE

ASSESSMENT

Scoring Descriptions

0 = not achieved, no activity/involvement

1 = minimal achievement or involvement

2 = making progress, noteworthy achievement, or involvement

3 = fully achieved or integrated

Indicator	Where are we now? (Score)	What tool can help us get there?
1. We have an inclusive and diverse review committee that includes people with lived experience.		<ul style="list-style-type: none"> • Designing equitable grant opportunities and review processes • Who is at your table?
2. We support multi-year and unrestricted funds to better meet the needs of the community.		<ul style="list-style-type: none"> • Designing equitable grant opportunities and review processes • Operations tools
3. We use an inclusion lens when evaluating proposals to understand how potential grantees include lived experience in their processes.		<ul style="list-style-type: none"> • Designing equitable grant opportunities and review processes
4. We disseminate RFPs to unfamiliar, under-resourced, or grassroots groups.		<ul style="list-style-type: none"> • Designing equitable grant opportunities and review processes
5. We support indirect costs and unrestricted funding which strengthens CBOs capacity to better meet community needs.		<ul style="list-style-type: none"> • Designing equitable grant opportunities and review processes • Operations tools
6. We assess previous granting efforts to identify gaps and improve our grant-making.		<ul style="list-style-type: none"> • Data tools • Site visits

GRANTING ACTION PLAN

Goals:	
Actions steps:	
Anticipated barriers:	
Approach to address barriers:	
How often will we revisit this plan:	

POST-GRANT CENTERING LIVED EXPERIENCE ASSESSMENT

Scoring Descriptions

0 = not achieved, no activity/involvement

1 = minimal achievement or involvement

2 = making progress, noteworthy achievement, or involvement

3 = fully achieved or integrated

Indicator	Where are we now? (Score)	What tool can help us get there?
1. We collect qualitative data centered on community voice and experience to better understand the impacts of our grant beyond the numbers.		<ul style="list-style-type: none"> • Data tools
2. The categories and metrics we use to evaluate our impact include metrics that predict power and access.		<ul style="list-style-type: none"> • Data tools
3. We disaggregate data, including all identity markers that aren't associated with access and privilege, to understand where gaps and/or inequities exist.		<ul style="list-style-type: none"> • Data tools
4. We hold close-out meetings with our grantees to learn what can be improved.		<ul style="list-style-type: none"> • Participatory grantmaking tools
5. Our close-out meetings include people with lived experience who are being served by our grantees.		<ul style="list-style-type: none"> • Community engagement tools • Empathy map • Who is at your table?
6. We are assessing program metrics to promote system change.		<ul style="list-style-type: none"> • Data tools
7. We support grantees after the check is distributed.		<ul style="list-style-type: none"> • Operations tools: trust-based philanthropy project

POST-GRANT ACTION PLAN

Goals:	
Actions steps:	
Anticipated barriers:	
Approach to address barriers:	
How often will we revisit this plan:	

TOOL LIBRARY

33

DESIGNING EQUITABLE GRANT OPPORTUNITIES AND REVIEW PROCESSES

This tool can be used to help you develop equitable grant opportunities that center lived experience by guiding you in evaluating your existing grant pipeline, integrating RFP questions that place value in incorporating lived experience, determining equitable indicators to evaluate applications, and creating an equitable review plan that includes people with lived experience.

39

WHO IS AT YOUR TABLE?

This tool can be used to help you determine who your currently involved stakeholders are, as they relate to the target population or issue area, identify gaps in representation and discuss opportunities to engage appropriate people with lived experience.

41

SITE VISITS

This tool helps you create a more meaningful, inclusive, and equitable site visit that incorporates the voice of program recipients. This checklist can serve as a guide for site visits with current grantees or for site visits with a potential grantee.

44

MAPPING ASSETS AND ENGAGING COMMUNITY

This tool helps you to leverage people with lived experience in identifying the strengths and resources that currently exist within a community, the assets that may inform current or future programs or initiatives, and determine community-led solutions to community challenges.

TOOL 1: DESIGNING EQUITABLE GRANT OPPORTUNITIES AND REVIEW PROCESSES

Purpose of this tool:

To help you develop equitable grant opportunities for potential grantees by systematically and authentically centering those with lived experience by guiding you in:

- *Evaluating your existing grant pipeline*
- *Integrating RFP questions that place value in incorporating lived experience*
- *Determining equitable indicators to evaluate applications*
- *Creating an equitable review plan that includes people with lived experience*

Suggested use:

The RFP process is a complex and essential part of the grant-making process. This tool was developed to support grant-makers with developing an RFP that is equitable from beginning to end. This tool is divided into three components, which can be used concurrently or on their own. The components of this tool includes:

- **Creating Equity Focused Grant Opportunities** which offers a checklist of considerations to support you in designing your next grant opportunity.
- **Developing Equity Focused Grant Application Questions** which provides you with a sample menu of equity-focused questions that can be used in your grant application.
- **Developing your Review Board** which helps you design an equitable review process.



TIP: Consider reaching those you want to engage through trusted organizations and networks (e.g. current or past grantees) and/or identifying individuals with lived experience within your own organization.

This tool was informed and developed from a variety of sources.^{8, 16, 22}

TOOL 1: DESIGNING EQUITABLE GRANT OPPORTUNITIES AND REVIEW PROCESSES

CREATING EQUITY FOCUSED GRANT OPPORTUNITIES

This checklist offers considerations to support you in designing your grant opportunity. It includes a mix of best practices and suggestions from community-based organizations that participated in focus groups. Choose at least one option from each of the sub-headers below and on the next page to support you in developing an equity-focused grant opportunity.



TIP: Before designing your funding opportunity ask: What are the current inequities in the community around a specific focus area (e.g. workforce development, education, health)? What does equity look like?

Remove barriers to accessing your grant opportunities

<input type="checkbox"/>	<p>Gather user experience feedback by asking past or current grantees about their experience with the grant application and process and make changes that reflect that feedback.</p> <p><i>Some examples may include how much time did it take to complete the application, was it overburdensome, was there enough time to apply, did you receive any/enough technical assistance, how did you find out about our grant opportunities?</i></p>	<input type="checkbox"/>	<p>Make your application language accessible for all. This may include reducing jargon, having multiple language options, or using simpler wording in your application.</p> <p><i>Use this Readability Test to check your application language</i></p>
<input type="checkbox"/>	<p>Give applicants more time to apply by setting a minimum application period.</p> <p><i>A minimum of five weeks may be appropriate, but a longer application period is ideal.</i></p>	<input type="checkbox"/>	<p>Provide multiple options for submission.</p> <p><i>Some examples include: non web-based options, videos of the program "in action", or applications that have been submitted to other funders.</i></p>
<input type="checkbox"/>	<p>Provide technical assistance and/or office hours to answer questions and clarify funding goals to applicants.</p>	<input type="checkbox"/>	<p>Build your scoring rubric into the application so that applicants are aware of how they will be assessed.</p>
<input type="checkbox"/>		<input type="checkbox"/>	<p>Build in time to provide customized feedback to applicants that are not funded.</p>

This tool was informed and developed from a variety of sources. ^{8, 16, 22}

TOOL 1: DESIGNING EQUITABLE GRANT OPPORTUNITIES AND REVIEW PROCESSES

Analyze who is a part of the process		Analyze your current and past grantmaking with an equity lens	
<input type="checkbox"/>	Involve those with lived experience in the process of designing the opportunity so they can help shape the goals, criteria, and questions that will be asked.	<input type="checkbox"/>	Analyze what populations your current and past grantees (race, gender, sexual orientation, disability, age, etc.) serve to determine who is missing.
<input type="checkbox"/>	Compensate people with lived experience for their time and input.	<input type="checkbox"/>	Analyze the composition (race, gender, sexual orientation, disability, age, etc.) of staff at funded organizations.
<input type="checkbox"/>	Engage people with lived experience to identify appropriate equity metrics and identify community assets.	<input type="checkbox"/>	Evaluate how your current and past grantees authentically engage people with lived experience.
		<input type="checkbox"/>	Conduct targeted outreach for each opportunity that is customized for key groups that have been historically underrepresented in your grant process.

This tool was informed and developed from a variety of sources.^{8, 16, 22}

TOOL 1: DESIGNING EQUITABLE GRANT OPPORTUNITIES AND REVIEW PROCESSES

DEVELOPING EQUITY-FOCUSED GRANT APPLICATION QUESTIONS

Below and on the following page is a sample menu of equity-focused questions that can be used in your grant RFP application. Incorporating some of these questions into the application or into conversations with potential grantees will provide an opportunity to learn how organizations are thinking about equity

and incorporating lived experience into their operations and programs. Consider including at least one of these questions in your application. These questions can also serve as a guide when developing your scoring system for evaluating proposals.

Question	What is the value in asking this question?
How are community members engaged in your work?	Describes engagement between potential grantees and the community/communities served and illuminates the depth and authenticity of engagement.
How are the perspectives of community members with lived experience included in program design and delivery?	Identifies mechanisms by which clients and community members are involved in the planning and development of program, services, and community initiatives. This can help funders identify how the potential grantee understands the needs of the community.
How do you gather and document feedback from program participants?	Shows the level of engagement a potential grantee has with its service recipients.
What actions have you taken as a result of feedback you have received from program participants?	Ensures equitable and authentic engagement practices in the community that are truly addressing community needs and concerns. This ensures funder dollars are used to best meet the needs of the community as described by the community itself.

This tool was informed and developed from a variety of sources.^{8, 16, 22}

TOOL 1: DESIGNING EQUITABLE GRANT OPPORTUNITIES AND REVIEW PROCESSES

DEVELOPING EQUITY-FOCUSED GRANT APPLICATION QUESTIONS (CONTINUED)

Question	What is the value in asking this question?
<p>Do you currently or have plans to collect demographic information about your organization’s staff, board, and senior leadership?</p>	<p>Shows that the applicant includes or intends to include lived experience as part of their operations by reflecting the demographics of the communities they are serving.</p>
<p>How does your thinking about equity inform how you create and implement programs?</p>	<p>Highlights potential grantee’s strategies (or lack thereof) to increase focus on marginalized groups.</p>
<p>Do you currently include equity measures in your service delivery?</p>	<p>Demonstrates commitment to data-driven and equitable service delivery, ensuring that community needs are more equitably met.</p>
<p>Do you identify specific demographic groups (age, race, ethnicity, income, gender, etc.) that may not be accessing services/resources? If so, how? And if not, how might you?</p>	<p>Describes actions that the organization is taking to reduce disparities and increase equitable outcomes.</p>
<p>How does your programming support long-term impacts in the community that you serve?</p>	<p>Increases the likelihood that your funds will have lasting impacts in the community.</p>

This tool was informed and developed from a variety of sources.^{8, 16, 22}

TOOL 1: DESIGNING EQUITABLE GRANT OPPORTUNITIES AND REVIEW PROCESSES

DEVELOPING YOUR REVIEW BOARD

Developing an equitable review board should start early. Determine your equity metrics early, develop a diverse review board, and address biases directly.

During the RFP development and while in conversations with potential applicants, be open and transparent with your applicant from the beginning about how final decisions will be made and who will make them. Use the matrix below to support you in developing an equitable review board.



EXAMPLE: Organization ABC sought to hire an evaluation team to assess a new program. Before releasing the RFP, they spoke with several leaders in the field and learned that independent evaluators were typically outbid for opportunities by large entities like universities and evaluation companies. This resulted in Organization ABC to include equity criteria for independent consultants upon release of the RFP.

Tool	Activity	Purpose
Who is at your table?	Diverse review team	A truly diverse review team will be inclusive of those with lived experience, content experts who are knowledgeable about the community without directly being a part of it, and people who more broadly understand the inequities that exist in the ecosystem.
Fishbone diagram tool	Identify equity metrics to evaluate RFPs	Be intentional about identifying where there are inequities early on to make sure you are doing your due diligence at this stage. These metrics may vary by program focus.
5 Sources of bias in your grant application	Combat bias in the review process	Carefully structure your review process to reduce bias. Not doing so can unintentionally distort results, which in turn can distort your mission.” By combating bias in the review process, you are better positioned to select the best organizations for your grant. ²⁰



TIP: To ensure accessibility, develop user-friendly scoring systems (a simplified RFP process benefits the potential grantee as well), provide training on how to conduct the reviews, and encourage open communication and questions throughout.

This tool was informed and developed from a variety of sources.^{8, 16, 22}

TOOL 2: WHO IS AT YOUR TABLE?

Purpose of this tool:

- *To determine who your currently involved stakeholders are, as they relate to the target population or issue.*
- *To identify gaps in representation and discuss opportunities to engage appropriate stakeholders.*

Suggested use:

Use this tool with your currently involved stakeholders to determine who is at your table and derive a plan to recruit appropriate stakeholders. If your table is not developed yet, you can use this tool to help initiate your stakeholder group.[†]

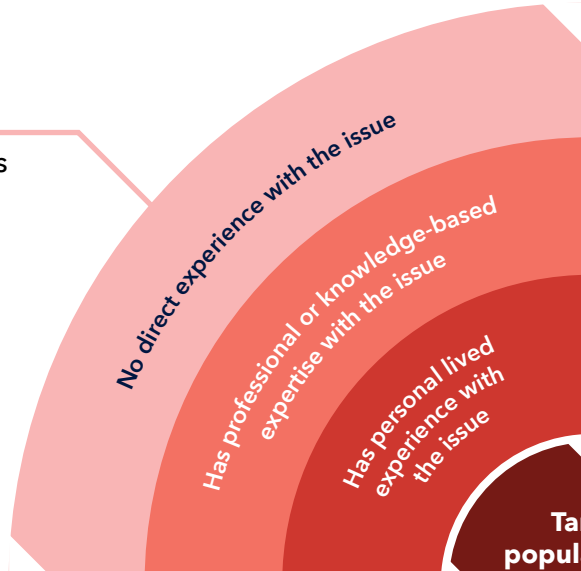
1. Begin by ensuring the group has a common understanding of the intended beneficiaries or the issue being addressed.
2. Provide each member of the current group an opportunity to identify where they fall within each of the four quadrants (Direct Engagement, Geographic Relevance, Demographic Relevance, Issue Experience).
3. Discuss where the group primarily lies within each quadrant. How does this affect your work (positively or negatively)? If there is only one person in the inner circle or in any of the inner rings, are they comfortable sharing their experience working with the group (do they feel fully valued, included, and/or equipped? Tokenized? Dismissed? Negative group behaviors may be unconscious but should still be identified and addressed if possible).
4. Discuss the goals of the group and where the group is in the process. Given that information, what is the ideal representation?
5. Identify any gaps and discuss opportunities to bring more people into the work.

[†] This tool is a modified version of the Kent County ENTF toolkit, which was developed by Inclusive Performance Strategies to equip a Kent County action team with tools that foster inclusive and collaborative environments designed to achieve equitable outcomes throughout.¹¹

TOOL 2: WHO IS AT YOUR TABLE?

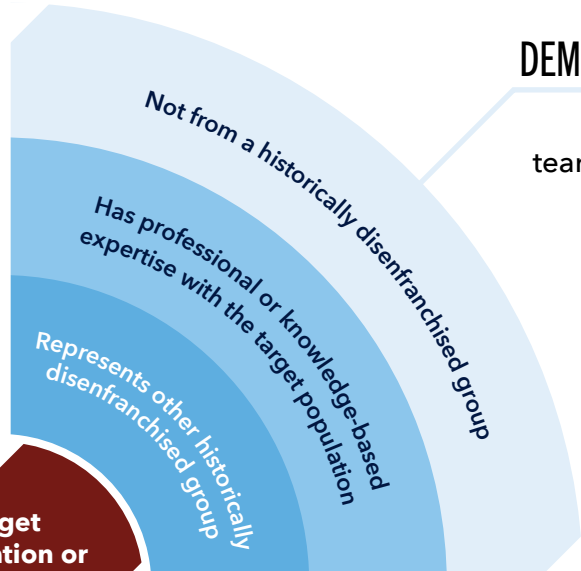
EXPERIENCE WITH THE ISSUE

How many people on this team have been directly impacted by this issue?



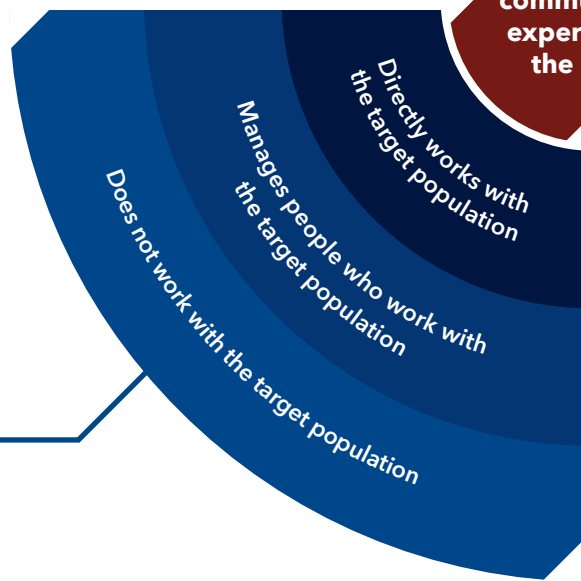
DEMOGRAPHIC RELATIONSHIP

How many people on this team demographically reflect the target population?



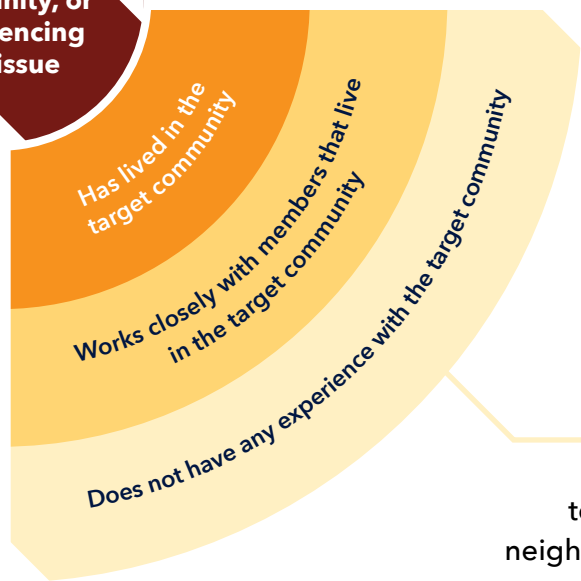
DIRECT ENGAGEMENT

How many people work directly with the target population?



GEOGRAPHIC RELATIONSHIP

How many people on this team grew up or live in the neighborhood you are serving?



Target population or community, or experiencing the issue

† This tool is a modified version of the Kent County ENTF toolkit, which was developed by Inclusive Performance Strategies to equip a Kent County action team with tools that foster inclusive and collaborative environments designed to achieve equitable outcomes throughout.¹¹

TOOL 3: SITE VISITS

Purpose of this tool:

To create a more meaningful, inclusive, and equitable site visit that centers community voice and incorporates the voice of program recipients. This checklist and sample questions can serve as a guide for site visits with current grantees or for site visits with a potential grantee.

Suggested use:

Use this tool to help you during your next site visit. This tool helps you approach your engagement with CBOs more meaningfully and equitably.



TIP: Be transparent, express vulnerability, and use your authentic engagement principles in your conversations with grantees.

This tool was informed and developed from a variety of sources.^{21,28}

TOOL 3: SITE VISITS

A CHECKLIST FOR EQUITABLE SITE VISITS

Before the visit	
<input type="checkbox"/>	Schedule the site visit well in advance by giving the CBO at least two weeks advance notice so they have ample time to prepare for your visit.
<input type="checkbox"/>	Co-create the agenda with the CBO and invite their input in designing the site visit.
<input type="checkbox"/>	Ask to see the program "in action."
<input type="checkbox"/>	Do your homework and prepare appropriate questions beforehand that are relevant to the CBO. Share the agenda and questions you'll be asking with the organization in advance of the visit.

During the site visit	
<input type="checkbox"/>	During the site visit, pay attention to what is happening both at the organization and in the community surrounding the site. Look and listen to what is happening both at the site and in the community surrounding the site.
<input type="checkbox"/>	Remember the site visit is not an inspection, it is a conversation.
<input type="checkbox"/>	Ask questions about how the group includes community in their work. Are community members involved in decision making, ideation, evaluation? What methods are used to engage? Are they authentically engaging community members?
<input type="checkbox"/>	Ask the CBO what the funder can do for them/what they can do to be more supportive.
<input type="checkbox"/>	If you decide to engage program recipients, ask the CBO what kind of client engagement is appropriate (all requests should be in the best interest of the client, NOT the funder or the organization).
<input type="checkbox"/>	Express your thanks and inform the CBO of the next steps, the decision-making process, and your timelines.

This tool was informed and developed from a variety of sources.^{21,28}

Sample questions for site visits

What are you working on now that you're really excited about or proud of?

What success story can you share about this program or your organization? What was the impact on the community you serve?

If we were to give a grant to your organization, what do you think the best use of our dollars would be?

Tell us about your budget: How does it reflect your organization's model, mission, and priorities? If there are indirect costs or operational costs, how are you currently supported?

What are some of the greatest opportunities to better meet the needs of the community you serve?

Do you involve people with lived experience in your organization, either as participants or volunteers?

How do you engage community members with lived experience in your program design and implementation?

This tool was informed and developed from a variety of sources.^{21, 28}

TOOL 4: MAPPING ASSETS AND ENGAGING COMMUNITY

Purpose of this tool:

- Identify the strengths and resources that currently exist within a community.
- Identify the assets that may inform current or future programs or initiatives.
- Identify community-led solutions to community challenges

Suggested use:

The foundation of this tool is intended to center the strengths of the community with respect to the variety of assets that exists within it.

1. Begin by reviewing the values below to better understand the framework of this tool and to guide you in this activity.
2. Align your mission, values, and goals for doing this activity.
 - *How does this effort align with our organizational mission?*
 - *How does our organizational values manifest in this?*
 - *How does this effort help us meet our goals?*
3. Review the descriptions of asset dimensions on the following page. This will help you understand the layers within the community to explore for an equitable asset-mapping experience.
4. Explore the critical questions to ask to help you identify the assets based on the asset dimensions. The Critical questions

to ask chart provides you with a list of questions for each dimension. Each question helps you to identify the individuals and organizations who form the structures and strengths in the community and those that stand to benefit from services.

5. Then, review the Types of Assets Diagram to help you determine the types of assets you want to identify in the target community.
6. Use the form at the end to develop your asset-mapping plan.

Values:

Transparency: Embrace potential conflicts, histories of actions/inaction, power dynamics, and the history of limited resources.

Collaboration: Shift from a paradigm of seeking feedback on programs to an effort indicative of an authentic co-construction of ideas and plans based on assets.

Equity: Align with current educational standards of equity which means intentional examination of organizational practices in both a historical and sociocultural context.

Ways to engage:

- *Interviews*
- *Site visits*
- *Survey*
- *Focus group*
- *Neighborhood visit*
- *Grantee application*

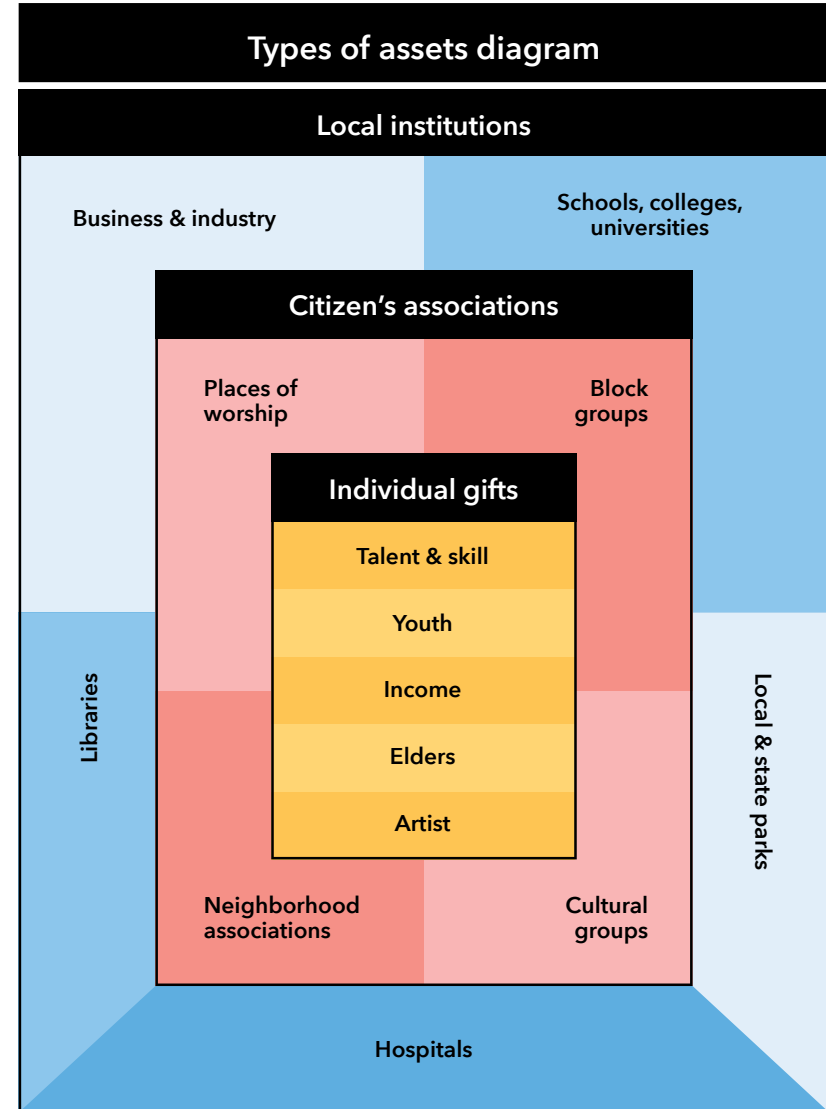


TIP: A community can be any target group you are seeking to map out assets for. Like an organization, a company, a specific geographic area, a sector, etc.

This tool is a modification of two tools, the American Institutes for Research Community Asset Mapping: A Planning Tool for Your Program and the Community Engagement Framework. Review the Community Engagement Framework for a comprehensive asset mapping tool.^{1,2}

TOOL 4: MAPPING ASSETS AND ENGAGING COMMUNITY

Critical questions to ask	
Primary Assets	Who are the people involved with the most direct influence on the project/relationship? Who can help us do what we want to do better?
	Who are the clients targeted for service as part of the project? How are they being included?
Secondary Assets	Who else is in the organization might support the work of the relationship? (i.e. research, finance, funding, planning, graphic design, technology, other programs etc.)
	Who are other clients you serve who are not targeted by the project/relationship, but might benefit from it?
Community Assets	Who are some people in your community you already partner with or whose knowledge and expertise might support the relationship?
	Who are some people in the community who might use your services but do not work in your organization? Who are people who currently/can benefit from the relationship? What are potential new program areas to start?
Historical and Sociocultural Assets	Who are the people who started your organization? Are they still around? Who traditionally has been a part of designing and developing relationships?
	Who has the organization typically served? How would the organization like that to grow or change? What efforts have been made to reach out to potential clients, customers, and stakeholders, especially from underserved communities? What opportunities exist to collaborate on regional needs in the community?



Attribution: Srmjohns, CC0, via Wikimedia Commons

This tool is a modification of two tools, the American Institutes for Research Community Asset Mapping: A Planning Tool for Your Program and the Community Engagement Framework. Review the Community Engagement Framework for a comprehensive asset mapping tool.^{1,2}

TOOL 4: MAPPING ASSETS AND ENGAGING COMMUNITY

Your Plan:			
2	Align your mission, values, and goals	Mission: How does this align with our organizational mission/vision?	
		Values: How does our organizational values manifest in this?	
		Goals: How does this project help us meet our goals? What specific goals of this project will help us meet those goals?	
3	How will you involve stakeholders?		
4	Critical questions to ask	Primary assets:	Secondary assets:
		Community assets:	Historical and Sociocultural assets:
5	Types of assets to identify		

This tool is a modification of two tools, the American Institutes for Research Community Asset Mapping: A Planning Tool for Your Program and the Community Engagement Framework. Review the Community Engagement Framework for a comprehensive asset mapping tool.^{1,2}



ADDITIONAL TOOLS AND RESOURCES

ADDITIONAL TOOLS AND RESOURCES

Asset Mapping PRE-GRANT GRANTING

- This [Asset Mapping Handbook](#) provides three approaches to asset mapping: whole assets, storytelling, and heritage.
- This [Community Engagement Framework](#) centers the strengths of the organization using an asset-based approach.

ABFE's Responsive Philanthropy in Black Communities OPERATIONS

- [ABFE's Responsive Philanthropy in Black Communities \(RPBC\) framework](#) and set of tools are designed to increase the capacity of all philanthropy – grant-making entities, collective giving models and donors – to do their work more effectively.

Community Engagement PRE-GRANT POST-GRANT

- This [Community Engagement Framework](#) centers the strengths of the organization to forge sustainable relationships between groups and individuals.
- [King County Community Engagement Worksheet](#) was designed to help departments and agencies increase equity and social justice work.
- [The Power of Authentic Engagement](#) presentation explores values and benefits of authentic engagement in collective impact work.
- [The Tamarack Community Engagement Planning Canvas](#) can help you work through the main considerations of community engagement.

Comprehensive Tools OPERATIONS PRE-GRANT GRANTING POST-GRANT

- [The United Way Worldwide Equity Framework](#) allows you to choose one or more “equity levers”: data; community mobilization and engagement; communications and awareness-building; policy and advocacy; fund-raising, resource allocation, and grantmaking; and local capacity building.
- [The Kent County Equity Toolkit](#) includes several tools to encourage representation of target markets, understanding of racial and economic disparity, authentic engagement, identification of power dynamics, and creative problem-solving.
- [Race Matters Toolkit](#) provides resources around five principles to advance racial equity in your department, organization, community, or network.

Data POST-GRANT

- [Racial Equity Tools](#) has a list of tools, tips, and examples around data used in assessing racial equity work, methods for securing quality data, and some of the challenges of using existing databases.
- [Centering Equity Throughout Data Integration](#) seeks to encourage shifts of awareness and practice by centering racial equity and community voice within the context of data integration and use.
- [By The Numbers](#) provides insights on how using disaggregated data on race and ethnicity affects the lives of children and communities through two case studies.
- [Considering Culture: Building the Best Evidence-Based Practices for Children of Color](#) discusses the effectiveness of evidence-based programs and practices in relevant community programs.

ADDITIONAL TOOLS AND RESOURCES

Empathy Map POST-GRANT

- This [Empathy Map Tool](#) will help you consider the perspectives of those who your project serves or affects. It will help your team consider the forces around your users and customers that affect their experiences. Fill out the provided exercise worksheet template to get started.

Navigating Difficult Conversations OPERATIONS

- [POWER MOVES](#) is an essential philanthropy self-assessment guide for equity and justice to help you determine how well you are building, sharing, and wielding power.
- [Guidelines for Authentic Conversations About Race](#) is a brief and direct guide for engaging in candid, productive conversations about this often difficult topic.
- [Changing the Conversation](#) is a report that aims to bridge the gap between foundations and community organizers in Detroit.

Operations Tools OPERATIONS POST-GRANT

- [The Trust-Based Philanthropy Project](#) is an initiative meant to address the inherent power imbalances between foundations and nonprofits by redistributing power.
- [Operationalizing Equity](#) looks at the Annie E. Casey Foundation's journey to promote race equity and inclusion to help other funders and grant-making organizations as they seek to embed the values of equity into their programming and operations.

- The purpose of the [Equity-Based Decision-Making Framework](#) is to ensure that service providers respond to the COVID-19 pandemic, system processes and policies proactively to eliminate racial inequalities and advance equity.
- [Awake to Woke to Work](#) explores the levers that drive change and the stages that mark transformation to provide insights, tactics, and best practices to shift organizational culture and operationalize equity.
- [Racial Equity Toolkit An Opportunity to Operationalize Equity](#) is designed to integrate explicit considerations of racial equity in decisions, including policies, practices, programs, and budgets.
- [Grantmaking with a Racial Justice Lens](#) provides grant makers with reflections, frameworks and tools built from the direct experience of activists and funders for advancing racial justice in any philanthropic setting.

ADDITIONAL TOOLS AND RESOURCES

Participatory Grantmaking

OPERATIONS

- [Deciding Together](#) is a guide that looks at why and how funders are engaging in participatory grant-making and shifting decision-making power to the very communities impacted by funding decisions.
- [Learn and Let Learn](#) is a research report that provides key teachings on learning communities through six case studies.
- [Race Equity and Inclusion Guide](#) is a seven-step action plan that provides a clear framework for undertaking race equity and inclusion at every stage of an organization's work.
- [Incorporating DEI In Your Grantmaking Process](#) is a checklist of actionable ideas on how to incorporate diversity, equity, and inclusion in grant-making processes.
- [The Participatory Budgeting Project](#) provides support for participatory budgeting processes to advance equity and inclusion.

Racial Equity Impact Assessment

OPERATIONS

POST-GRANT

- [Tools for Thought: Using Racial Equity Impact Assessments for Effective Policymaking](#) discusses how racial equity impact assessments center decision-making on facts and can lead to smarter, more targeted public investment.

Unconscious Bias

PRE-GRANT

GRANTING

- Visit [Project Implicit](#) to select an Implicit Association Test to learn more about your unconscious biases.
- This [Diversity In Action Toolkit](#) is geared toward supporting you in your efforts to increase diversity and adopt inclusive policies and practices.
- [5 Sources of Bias in Your Grant Application Review Process](#) is a visual guide to bias in the grant review process.
- [Resources to Fight Racism and Unconscious Bias](#) includes a list of resources to support your fighting implicit bias and to advance progress.
- [Implicit Bias and its Role in Philanthropy and Grantmaking](#) includes a list of strategies to reduce bias in philanthropy.

REFERENCES

- 1 [Actionable Intelligence for Social Policy \(AISP\) \(2015\). Community Engagement Framework. University of Pennsylvania.](#)
- 2 [Actionable Intelligence for Social Policy. \(2020\). Rep. A Toolkit for Centering Racial Equity Throughout Data Integration. University of Pennsylvania.](#)
- 3 [Aperian Global. \(2020\). Three Steps to Address Unconscious Bias.](#)
- 4 [Attygalle, Lisa. \(2017\). The Context Experts. Tamarack Institute.](#)
- 5 [Community Engagement. \(2021\). Tamarack Institute.](#)
- 6 [Equity vs. Equality and Other Racial Justice Definitions. \(2021\). The Annie E. Casey Foundation.](#)
- 7 [Facilitating Power. \(2019\). The Spectrum of Community Engagement to Ownership. Movement Strategy Center.](#)
- 8 [GrantCraft \(2007\). Implementing a Commitment to Racial Equity in Policy + Practice. Candid.](#)
- 9 [Holley, K. \(2016\). The Principles for Equitable and Inclusive Civic Engagement. Kirwan Institute for the Study of Race and Ethnicity. The Ohio State University.](#)
- 10 [IPUMS USA. \(2019\).](#)
- 11 [Inclusive Performance Strategies. \(2020\). Equity Toolkit. Kent County Essential Needs Task Force \(ENTF\).](#)
- 12 [Kauh, T. \(2018\). Can Capturing More Detailed Data Advance Health Equity? Robert Wood Johnson Foundation.](#)
- 13 [Michigan Association of United Ways. \(2021\). ALICE in Michigan: A Financial Hardship Study. United for ALICE.](#)
- 14 [Office of Strategic Diversity and Inclusion Programs. Unconscious Bias. Lawrence Livermore National Library.](#)
- 15 [On Uneven Ground: ALICE and Financial Hardship in the U.S. \(2020\). United for ALICE.](#)
- 16 [Philanthropic Institute for Racial Equity. \(2019\). Grantmaking with a Racial Justice Lens.](#)
- 17 [Poverty Solutions. \(2020\). Rep. Investing in Us. University of Michigan.](#)
- 18 [Quarterly Workforce Indicators. \(2001-2019\).](#)
- 19 [Sources of Power. Boundless.](#)
- 20 [Submittable. \(2020\). 5 Sources of Bias in Your Grant Application Review Process.](#)
- 21 [Teen Philanthropy Cafe: Site Visits. \(2015\). Exponent Philanthropy.](#)
- 22 [The Center for Effective Philanthropy. \(2018\). Nonprofit Diversity Efforts: Current Practices and the Role of Foundations.](#)
- 23 [The Empathy Map. \(2017\). Tamarack Institute.](#)
- 24 [The Equity Manifesto. \(2018\). Policy Link.](#)
- 25 [Trent, Kim. \(2020\). Employment Equity Learning Community. Michigan Department of Labor and Economic Opportunity.](#)
- 26 [Trust-Based Philanthropy Project. \(2021\). Trust-Based Philanthropy: An Overview.](#)
- 27 [Valerio, Anna Marie. \(2020\). Operationalizing Inclusion: Where Strategy, Tactics, and Values Intersect. Society for Human Resource Management.](#)
- 28 [What Funders Get Wrong About Site Visits \(2020\). Philanthropy without Borders.](#)

APPENDIX

KEY TERMS AND CONCEPTS

- **Equity** is “just and fair inclusion into a society in which all can participate, prosper, and reach their full potential”¹⁸ and “involves trying to understand and give people what they need to enjoy full, healthy lives.”⁵
- **Inclusion** is “the action or state of including or of being included within a group or structure. More than simply diversity and numerical representation, inclusion involves authentic and empowered participation and a true sense of belonging.”⁵
- **Authentic engagement** is “the intentional process of co-creating solutions in partnership with people who know best, through their own experiences, the barriers to opportunity. This is grounded in building relationships based on mutual respect that acknowledges each person’s added value to developing solutions together.”³
- **Power** is the ability to get things done and influence actions and behaviors to achieve a goal for the greater good.¹⁴
- **Community engagement** is “the process by which citizens are engaged to work and learn together on behalf of their communities to create and realize bold visions for the future”⁴; it is a method by which one can plan and problem-solve more equitably.
- **Unconscious Bias** is a social stereotype about certain groups of people that an individual forms outside their own conscious awareness.¹⁰ These biases may lead you to make decisions or judgments about someone’s abilities, competence, or experiences that are untrue to that person or group.²
- **Asset Mapping** is a community-engagement approach that centers the strengths of the community or organization rather than its needs. This approach builds sustainable relationships between groups and individuals.¹
- **Empathy mapping** is a tool that encourages the user to consider the perspectives of those whom an initiative serves or affects by considering what they are thinking, seeing, doing, and feeling.¹⁷
- **Content experts** are “professionals, staff in your organization, service providers, and leaders with formal power who have knowledge, tools, and resources to address the issue.”³
- **Context experts** are “people with lived experience of the situation, including children and youth. They are the people who experientially know about the issue.”³

METHODOLOGY

United Way for Southeastern Michigan (UWSEM) partnered with Detroit Future City (DFC), a nonprofit think and do tank that focuses on economic development and environmental sustainability through a race and equity lens, to develop this blueprint. Through a combination of activities that took place in two phases – research (phase one) and engagement (phase two) – DFC sought to create a usable document that informs ways in which funders could better integrate lived experience throughout their grant-making processes to improve equitable outcomes.

Getting to a blueprint involved:

- *Producing a research findings report*
- *Interviewing thought leaders in the field*
- *Engaging the UWSEM program staff through a series of workshops*
- *Conducting four focus groups with community-based organizations (CBO) and southeastern Michigan residents*
- *Disseminating surveys to residents in southeastern Michigan*

Phase One

During phase one, DFC produced a research finding report that provided a synopsis of similar literature, national models, toolkits, and interviews with thought leaders. Guiding DFC's research was the question, "How can UWSEM and other southeast Michigan funders better integrate lived experience throughout their

grant-making process to improve equitable outcomes?" The report outlines three main themes from DFC's research that inform how funders can better integrate lived experience with an equity lens:

- *Operationalizing equity*
- *Capturing lived experience*
- *Participatory grantmaking*

During phase one, DFC also worked closely with UWSEM to determine the aspects of equity to be emphasized, understand current challenges, and establish a shared vision of success. These efforts informed the framework for this equity blueprint and the engagement approach that took place in phase two.

Phase Two

Phase two commenced with a series of workshops with UWSEM program staff. These individuals represented four program areas within the organizations and were not tied to or familiar with this project. The goals for these workshops were to:

- *Introduce this project to UWSEM staff*
- *Establish a shared vision of success*
- *Understand current challenges*
- *Learn best practices*
- *Establish collective values*
- *Determine the key areas throughout the grant processes to incorporate lived experience*

METHODOLOGY (CONTINUED)

Four virtual focus groups were also conducted during phase two. Two focus groups were focused on community-based organizations (CBO), and two were focused on residents in southeastern Michigan who were involved with programs or received services from a CBO. During the focus groups with CBOs DFC facilitated discussions to learn best practices for engaging residents and learn where CBOs felt funders could better incorporate lived experience in their processes. Focus groups with residents were centered on learning their needs and interests, lifting best practices in engagement, and documenting their input on incorporating lived experience in the grant-making process. Representatives of CBOs and residents not able to attend the focus groups were offered an opportunity to complete a survey focused on capturing their input and experiences.

**DETROIT
FUTURE
CITY**

 **National Fund**
for Workforce Solutions



United Way
for Southeastern Michigan