

TOOLKIT:
CREATING MORE
INCLUSIVE
FUNDER COLLABORATIVES

ABOUT THIS TOOLKIT

At a meeting of funder collaboratives from around the world in October 2018, a group of funders, collaborative fund leaders, and nonprofit leaders asked a series of questions about how to improve the functioning of funder collaboratives. They decided that one important way is to ensure that philanthropy does not become an echo chamber of donors talking to each other, but that funders include, in meaningful ways, the points of view of people who might not be in the room or already have a seat at the table. This is critical, they noted, because these underrepresented people and groups are often the ones that funders intend to benefit.

To help advance better listening and more inclusivity, some of the meeting's participants* developed a toolkit for funders and funder collaboratives to elevate underrepresented voices in their work. The toolkit, which is evolving under the auspices of Fund for Shared Insight, is licensed under Creative Commons so funders and funder collaboratives can use and adapt it. We hope to add to and improve it over time. If you have ideas, feedback, or examples we should consider adding, please email rick@fundforsharedinsight.org.



*Lindsay Louie, William and Flora Hewlett Foundation, and Fay Twersky, when she was at Hewlett, wrote the original version, in consultation with Judith Bell, Nagma Mulla, Hilary Pennington, Nadia Roumani, Vidya Shah, and Melinda Tuan. Fay, who is now at The Arthur M. Blank Foundation, and Lindsay, are pictured (center) here.

INTRODUCTION

Collaborative funds are growing increasingly common in philanthropy globally, likely for a few key reasons. First, many funders have realized they cannot tackle the problems and challenges they seek to address on their own. Second, collaboratives expand capacity beyond a single foundation's walls and may enable more innovation and risk-taking than the foundation alone would be willing to do. Further, collaboratives create a mechanism by which high-net-worth individual donors can work together with private foundations to achieve common goals. For more information on collaboratives, please see recent research, [How Philanthropic Collaborations Succeed, and Why They Fail](#), by Alison Powell, Susan Wolf Dittkoff, and Fay Twersky.

In parallel, there is a growing awareness among funders that their work should be better informed by the people whose lives are affected by their strategy and grantmaking decisions. As a funder collaborative itself, Fund for Shared Insight's goal is that funders and nonprofits be more meaningfully connected to the people and communities at the heart of their work, and more responsive to input and feedback.

Putting these two lines of work together – collaborative funds and listening to those most impacted by the decisions funders and nonprofits make – we realized there are few resources for collaborative funds that want not only to listen better to people whose voices have been excluded or left out, but also meaningfully include those voices in their work. And in exploring how funders might improve such engagement, it quickly became apparent that there is no one right way. Thus, we appreciated the work done on this menu of ways collaboratives might change their systems and structures to bring new and underrepresented voices meaningfully to the table — and decided to share the full toolkit, and continue to work on it, with you.



Finally, no matter which approach you choose to elevate the voices of underrepresented groups, we encourage you to make sure your practices are responsible and effective. If you are going to ask for people's time, for example, compensate them. If you are going to include new and underrepresented people in a meeting, be thoughtful about who facilitates and how to be sure all participants feel as welcome, safe, and included as possible.¹ This may mean doing things differently than you have in the past, such as by working with different facilitators, working at a different pace, working in multiple languages, or meeting in different places and spaces. You might also employ new practices, such as by getting feedback from participants in ways you haven't regularly before, having anonymous channels for questions or comments, being more open to learning and improving over time, or recognizing that some people in the room are used to "stepping up" instead of "stepping back." Overall, wherever possible, we encourage you to go beyond transactional interactions to build ongoing relationships based in trust.

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In the same spirit, as you approach the exercises in this toolkit, we encourage you to seek to center equity. This toolkit is not a substitute for other work on racial equity, structural racism, diversity, inclusion, anti-racist practice, and/or implicit bias. (For more work in those areas, we encourage you to explore other resources and to bring in supports, facilitators, and coaches as needed.) But we are hopeful that the work you do here advances equity inside and outside your collaboratives.

¹<https://www.fastcompany.com/90516384/research-shows-us-workplaces-need-this-level-of-diversity-to-prevent-tokenism>

HOW TO USE THE TOOLKIT EFFECTIVELY

To help funds use the toolkit effectively and put the menu's ideas into practice, we include three worksheets.

STEP 1 / Identify Underrepresented Groups in Your Collaborative

STEP 2 / Review and Consider the Menu of Approaches

STEP 3 / Create a Plan to Make Your Collaborative More Inclusive

We suggest that individual members of a collaborative complete the worksheets on their own, then come together to discuss their answers and thoughts about the work of the collaborative, what groups to engage and how, and next steps.

Just as there is no one right way to engage underrepresented groups, there is also not one universal set of underrepresented groups. The answer to the question, **“What groups might be underrepresented in your collaborative fund?”** will depend wholly on the type of work you do, where you do it, and whom you have already engaged in the fund to date. You might consider whether you have engaged:

- Foundations
- Businesses
- Individual donors
- Nonprofit leaders
- Government agencies
- People and Communities most affected by the funding decisions you make

Across all these categories, we encourage you to consider geographic representation and the representation of people of different races, ethnicities, genders, socioeconomic classes, ages, and abilities.

STEP 1 / Identify Underrepresented Groups in Your Collaborative

1. Think of a philanthropic collaborative you're a part of. Consider these dimensions of that collaborative, then fill out the table below.

- Who does the collaborative aim to serve in its work? Whose lives will be most affected by the work and decisions of the collaborative?
- What is the current make-up of your fund structure? What groups are represented, and in what ways? Who has power to make decisions about focus and funding?
- What group or groups might be missing altogether? (Groups can be defined in many ways. They can be nonprofit leaders and staff; the people you seek to serve or those who will be most impacted by your work; government agencies; businesses; or foundation, corporate, or individual donors. And across all these categories, groups can be defined as people of different races, ethnicities, genders, socioeconomic classes, ages, and abilities.)

STEP 1 / Identify Underrepresented Groups in Your Collaborative CONTINUED

| Dimensions of your collaborative fund structure. | What groups are currently represented, and in what ways? | Who isn't currently represented, and whose representation and perspective might add important dimensions to your work? |
|---|--|--|
| Fund Leadership (Include the governing or advisory board(s) and senior staff.) | | |
| Fund Membership (If different from fund leadership.) | | |
| Fund Programming (Who determines agendas for funder and/or grantee events and meetings?) | | |
| Fund Staff and Consultants | | |
| Grantees/Partners (What groups get funded? What groups do grantee leaders represent?) | | |
| The People You Seek to Serve | | |
| Other Dimensions (Groups or dimensions of the work that are important and not included above.) | | |

STEP 1 / Identify Underrepresented Groups in Your Collaborative CONTINUED

2. Pick one dimension of fund structure (from the left column above) and its corresponding underrepresented group or groups (from the right column above) to focus on, starting to think about ways to increase and amplify representation.

3. Why is it important to include underrepresented groups? For each of the underrepresented groups outlined in the table above, consider:

→ How will your work be better or stronger if you include that voice in different dimensions of your fund structure?

→ How might your work be weaker if you don't?

→ Are there aspects of your work where you think that this isn't relevant or applicable? Name those and discuss with colleagues to ensure you're on the same page, and also that you haven't missed anything or made an assumption about something that others see differently.

STEP 2 / Review and Consider the Menu of Approaches

| Applicable for you? | Idea / Approach | Notes |
|---------------------|---|-------|
| | Hire people to work with your collaborative from groups currently underrepresented in the collaborative. | |
| | Invite members of underrepresented groups to be voting members of your collaborative. (They would attend and participate in meetings, receive communications, etc., and participate in decision-making.) This allows for relationship-building over time and power-sharing. | |
| | Invite members of underrepresented groups to be non-voting members of your collaborative. (Among other interactions, they would attend and participate in meetings and receive communications.) This will build relationships over time. | |
| | Create an advisory board of underrepresented group(s). | |
| | Create a participatory design process for input into strategy development or grantmaking criteria and processes. | |
| | Routinely make at least a portion of your funds available for participatory grantmaking — and then take the time to learn from those who participate about their thinking, approach, decisions, etc. This allows for power-sharing. | |
| | Have periodic town hall meetings or community conversations where your funders and staff can connect with underrepresented groups who have experience and perspectives on the issues you're working on. | |
| | Build systematic feedback loops with members of underrepresented groups so their points of view are included in data you use. | |
| | Do systematic polling or data collection so that you have representative perspectives of underrepresented voices for consideration. | |
| | Consider and be thoughtful about where you hold your meetings. Take time to learn together about the issues for people there (e.g., for funders in the United States that are working on racial justice, hold your meetings in a location with historic significance, like Montgomery, Ala.). | |
| | Other ideas/approaches: | |

STEP 3 / Create a Plan to Make Your Collaborative More Inclusive

Note: Like many things in life, there are ways to do the above items well, and ways to do them poorly or even create harm. Each would need thoughtful implementation. For example, if you are asking for people's time, you should be clear from the start that you will fairly compensate them for it. Be clear about the commitment and if/how you want to share their personal information. Also, it's important to build in accountability mechanisms to ensure longer-term commitment and follow-through at your collaborative and responsibility to those you are engaging. Running town halls, for examples, requires a plan to report back to the people who participated what you heard and what you're doing in response.

1. What would you like to try working on from the menu above?

2. How will you get started? What action will you take now or soon?

3. Who else can be a champion with you?

STEP 3 / **Create a Plan to Make Your Collaborative More Inclusive** CONTINUED

4. Create a timeline for taking your first steps:

5. What might your timeline be for the whole process?

6. What are your biggest concerns about implementing these changes? What might get in your way of making progress?

7. How could you potentially confront or mitigate these concerns and challenges?