

Resources for Funders Ready to Go

When you are ready to start planning your participatory work, go here for sample documents and templates, like budgets and a project outline.

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Operating Budget Checklist

Each participatory philanthropy program is unique, but this checklist will give you a general idea of what to consider when planning your operating budget. Not all of these items are necessary for every participatory process, but it's important to secure adequate support for the things your organization will need to implement a participatory process. Many of these resources can be covered within your organization's existing structures and operating costs, so may not present as additional costs. Those costs particular to participatory philanthropy have an asterisk (*) next to them.

What to consider when planning your operating budget:

Staffing and management

- ✓ Staff resources or consultant fees for planning, design, project management
- ✓ Equity, Diversity, and Inclusion consultants or staff expertise in this area
- ✓ Legal and/or HR consultants/staff to provide support and help manage risks
- ✓ Finance/Operations consultants/staff (software tools, travel, payments, etc.)
- ✓ Fundraising consultants/staff (raising funds, reporting to donors, etc.)
- ✓ Designers and/or video editors for materials produced
- ✓ Professional translation and/or interpretation
- ✓ Communications resources (especially for reaching larger audiences)
- ✓ Evaluation consultants/staff or an external evaluation firm

Participation

- ✓ Coaching for staff (e.g., on decision-making approaches and tools, facilitation)*
- ✓ Accessibility costs and support (e.g., meeting accommodations or providing equipment or internet to participate)
- ✓ Trainings for participants (e.g., philanthropy, decision making, addressing bias)*
- ✓ Honoraria/payments for stakeholders (consultation phase)*
- ✓ Honoraria/payments for participants (designers or decision makers)*
- ✓ Care packages/support for participants (sickness, hardship, etc.) or gifts for participants*

Meeting and convenings

- ✓ Professional facilitators (for meetings/convenings and asynchronous participation)*
- ✓ Celebration expenses (branded merchandise, convenings, gifts, etc.) Travel, food, accommodation and care expenses (for in-person and hybrid gatherings)
- ✓ Meeting expenses for in-person gatherings (venue, activities, equipment, insurance, etc.)*
- ✓ Hybrid meeting support and additional equipment rental fees (for hybrid gatherings)
- ✓ Graphic recorder (for in-person or virtual gatherings)
- ✓ Communications resources (especially for reaching larger audiences)

Participatory Project Outline

While we do not expect that funders will replicate the approach we took for our [Participatory Climate Initiative](#) in full, this outline can help you incorporate participation into your organization and different phases of the philanthropic cycle.



Sample Project Scope

Shared Insight developed this Project Scope for our [Participatory Climate Initiative](#). Below are the initiative's learning goals, requirements, and recommendations – defined by the funders and passed along to our Design Team. Consider what are the required parameters of your funding before opening up decision making to those outside of the foundation.

Learning Goals

The project, focused on climate change, will support funders to deepen their practices in these two areas:

Funding work that involves people in the policy decisions that impact them, with a focus on those least heard and most impacted by those policy decisions.

Participatory grantmaking as a way to elevate beneficiary voices and share power, with a focus on those least heard and most impacted by funding decisions.

Requirements for the project

Requirements are firm decisions that are made by Shared Insight's Advocacy/Policy Change Committee before the participatory design phase. The participatory design team must abide by these requirements.

Grants will fund work in the broad area of climate change policy.

Grants will fund work that involves people in policy decisions that impact them.

The grantmaking process and the design phase will be participatory.

The participatory design team will integrate equity/diversity/inclusion lenses from the beginning of the design phase, and be explicit about including the voices of people most impacted and least heard.

No climate deniers will be involved with the participatory design phase.

Grants will fund work happening only in the U.S. (inclusive of all 50 states, territories, and Washington D.C.). (Note: We are discussing language that will also be inclusive of tribal nations and Native communities that may not be adequately included in this definition.)

Requirements around grantmaking will be defined by our fiscal sponsor. Shared Insight will not add additional requirements that narrow the parameters set by our fiscal sponsor.

Recommendations to design team about the project

Recommendations will be considered by the design team, but they are not requirements. Shared Insight's Advocacy/Policy Change Committee will accept the decision of the design team in these areas, even if they diverge from recommendations.

Design for learning. For example, a focus on a specific geographic area may enable us to more effectively trace results and learn from them.

Consider integrating this work with decision-making tables that already exist and could benefit from more community involvement with policy decisions.

Align the geographic or thematic focus with work that Shared Insight members are already involved in to encourage interest in the results among funder institutions.

Avoid the use of terms like "climate justice" in favor of a "big tent" approach that adopts inclusive language that will not alienate stakeholders.

Consider focusing grants exclusively on Native or Indigenous communities, and take into account the historic exclusion of Native or Indigenous people from advocacy and philanthropy.

Project Roles

While we don't anticipate that all elements of our approach would be fully adopted by another funder, below are the roles, phases of involvement, and engagement levels of our initiative that can help you think about yours.

- **Very light engagement:** less than an average of 2 hours/month during the active phases identified
- **Light engagement:** less than an average of 3 hours/week during the active phases identified
- **Medium engagement:** less than an average of 15 hours/week during the active phases identified
- **Significant engagement:** more than an average of 15 hours/week during the active phases identified

Fundors			
ROLE	DESCRIPTION	PHASE INVOLVED	ENGAGEMENT
Funders	Contributed to the initiative budget and overall governance of the donor collaborative that housed the initiative; reviewed and approved plans and budgets and each phase of the initiative; participated in learning activities related to the initiative several times throughout the year.	<ul style="list-style-type: none"> • Planning • Design • Grantmaking • Implementation & Learning 	Very light
Committee Members	Funders who sat on Shared Insight's Advocacy/Policy Committee that initiated this work; played an active role during the planning phase; participated in learning activities related to the initiative about every other month; responsible for bringing learning back to their home organizations.	<ul style="list-style-type: none"> • Planning • Design • Grantmaking • Implementation & Learning 	Very light
Committee Co-Chairs	Members of Shared Insight's Advocacy/Policy Committee who were more active and involved with planning this work; met regularly with the project sponsor and project managers throughout the initiative to offer feedback and guidance.	<ul style="list-style-type: none"> • Planning • Design • Grantmaking • Implementation & Learning 	Light
Funder Representatives	One funder representative joined the Design Team as liaison with Shared Insight's funder committee; two funder representatives joined the Grantmaking Group. The funder representatives participated as observers and were charged with bringing their observations and learning back to the funder committee and beyond.	<ul style="list-style-type: none"> • Planning • Design • Grantmaking 	Medium
Project managers and support and support team			
ROLE	DESCRIPTION	PHASE INVOLVED	ENGAGEMENT
Project Sponsor	The managing director of Fund for Shared Insight was responsible for hiring the Consultants and supervising the project under the direction of the Advocacy/Policy Committee.	<ul style="list-style-type: none"> • Planning • Design • Grantmaking • Implementation & Learning 	Medium
Support Team	Support from Fund for Shared Insight and Rockefeller Philanthropy Advisors' team of staff and contractors included grants administration, disbursing payments, communications, design, equity/diversity/inclusion support, logistics, and more.	<ul style="list-style-type: none"> • Planning • Design • Grantmaking • Implementation & Learning 	Medium
Facilitators & project managers	The project managers planned and implemented each phase of the initiative under the direction of the project sponsor. Consultants with expertise in participatory philanthropy and group work served as facilitators and project managers. They were responsible for supporting the Design Team, Grantmaking Group, and Learning Community meetings and asynchronous collaboration. (These roles could be separated.)	<ul style="list-style-type: none"> • Planning • Design • Grantmaking • Implementation & Learning 	Significant

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Project Roles *(continued)*

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- **Significant engagement:** more than an average of 15 hours/week during the active phases identified

Community members			
ROLE	DESCRIPTION	PHASE INVOLVED	ENGAGEMENT
Stakeholders Consulted	Stakeholders participated in 30-to-60-minute phone/video calls during the Planning and Design Phases. Stakeholders had experience with issues on climate and environment, philanthropic funding flows locally, and community leadership efforts.	<ul style="list-style-type: none"> • Planning • Design 	Very light
Partner Selectors	12 partner organizations deeply embedded in regional work at the intersection of climate/environment and advocacy/policy were invited to select someone from their community to join the Design Team.	<ul style="list-style-type: none"> • Design 	Light
Design Team Members	12 Design Team members with strong connections to their region and climate/environment issues considered key design questions and created a purpose statement for the fund; 11 members continued their engagement during the Grantmaking Phase; several joined the Grantmaking Group.	<ul style="list-style-type: none"> • Design • Grantmaking 	Medium
Nominators	Stakeholders with specific expertise were invited to nominate groups for funding that met the criteria created by the Design Team.	<ul style="list-style-type: none"> • Grantmaking 	Very light
Grantmaking Group members	14 Grantmaking Group members (seven from each region) made decisions about how \$1 million would be distributed in each region; they also communicated funding decisions; some joined the Learning Community.	<ul style="list-style-type: none"> • Grantmaking • Implementation & Learning 	Medium
Grantees	35 groups/organizations participated in the application process and received grants; some joined the Learning Community.	<ul style="list-style-type: none"> • Grantmaking • Implementation & Learning 	Light
Learning Community	Mix of Design Team, Grantmaking Group members, and funders who are interested in exploring the productive tensions in philanthropy; convened once a quarter or so to discuss these issues with an optional in-person gathering.	<ul style="list-style-type: none"> • Learning 	Light

**Have questions about the toolkit?
Or want to learn more?**

Please reach out to Katy Love (katy@fundforsharedinsight.org), the toolkit's co-author with Winifred Olliff, both consultants with experience and expertise in participatory grantmaking.



[Contact Katy](#)