

# Funder Readiness Assessment

Find here questions and discussion prompts to advance conversations about participatory philanthropy within your organization before deciding how you might implement new practices or programs.

- Financial Resources
- Power
- Capacity and Time Constraints
- Practitioner Skills

## Financial Resources

Understanding what investment is required by your organization up-front can be an intimidating challenge for organizations that are new to participatory philanthropy. Use these questions to demystify this challenge.

### Discussion Prompts

Do you have sufficient resources to support an operating budget that will make your participatory philanthropy efforts successful?

[See Operating Budget Checklist](#)

**Q.** Does your organization have resources available to make participatory philanthropy happen?

Do you have sufficient resources, like a substantial grant budget?

It is important to have meaningful resources for the participants to decide about. What is meaningful will depend on the context.

Do you have funds available to compensate participants?

Payments to participants are another way you can resource and support communities and payments will make it possible for more people to participate. Compensating participants can make the process more equitable and less extractive, honoring the expertise, networks, reputations, and credibility you are asking participants to share. An appropriate hourly rate might be comparable to what your foundation pays other staff or consultants. Always disclose the details of these payments to participants to ensure they understand what payments will be taxable and must be reported to the IRS. Be mindful that payments may have tax implications for participants or affect their eligibility for public benefits.

[See Participant Compensation Resources](#)

Have you invested in building sufficient expertise in-house not only to initiate this program but also to carry the work forward?

Remember that the skills required for successful participatory philanthropy may be very different from those required for a traditional grantmaking program. The role of the program team in participatory philanthropy tends to shift toward managing the process on the back end, engaging participants, and liaising with fund applicants. If you do not have this expertise in-house, consider how you can bring it into the process, build your expertise in the long term, and make plans that are realistic and achievable for your organization at this time.

[See Roles & Engagement Levels](#)



The costs of participatory philanthropy may seem intimidating at first, but will decrease as the programs and practices become a regular part of your organization's operating strategy. Many costs are one-time start-up costs and will not be required over time. If you are having difficulty making a case for its value with respect to cost, focus on the many benefits that go beyond making high-quality and impactful decisions, such as building long-term trust and credibility with the communities your organization works with.

# Power

Sharing power is at the heart of participatory philanthropy, yet it is a challenge for many organizations to discuss power dynamics explicitly. While these discussions are not always comfortable, they are absolutely necessary. There is a substantial difference between inviting people's feedback or consulting them and ceding decision-making power.

Q.

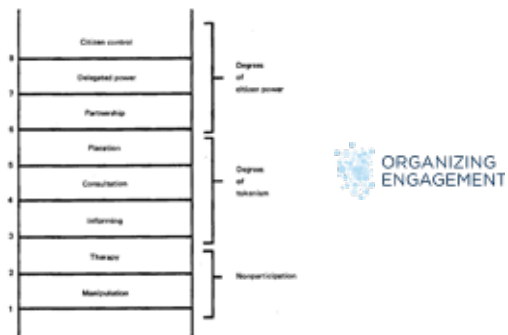
Where and how is your organization ready to cede power to participants in meaningful ways?

## Discussion Prompts

### Where will you fall on the spectrum of participatory decision making?

When you invite people's input but you intend to make decisions, be explicit about that. When power sharing is overstated, you risk breaking trust with participants when the "real decision makers" do not follow through on their decisions or recommendations after a lengthy participatory process. And when the norms and practices of power are not made explicit, everyone operates from their own assumptions – and those with less formal power will bear the consequences of the resulting confusion.

See Sherry Arnstein's Ladder of Citizen Participation to consider where you will fall on the spectrum of participatory decision making.



Sherry Arnstein's Ladder of Citizen Participation

### Have you identified who the key decision makers are in your organization or community who will need to commit to ceding power in order to move forward?

They may be people in formal or informal positions of power within your organization or community, such as leadership like board members, directors, or community leaders.

### Do decision makers require training and/or support to fully understand what it means to cede power in this context?

If this is not fully understood, any commitments they make may not be meaningful. It is critical for you to understand any concerns or barriers, and any requirements that decision makers have established.

### Are you able to secure wholehearted, firm, and specific commitments from decision makers, preferably in writing or in a context that is public or recorded?

It may feel easier to informally agree to the principles of sharing power, but you may want to create an agreement to refer back to during the process. Keeping decision makers informed and involved will facilitate good communication and avoid difficulties.

### A Funder's Reflections on a Participatory Philanthropy Initiative



[Read viewpoint](#)

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## Power *(continued)*

### Discussion Prompts

Does the decision makers' agreement clearly define and document the parameters, conditions, and limits of how power is being ceded to participants?

Setting clear boundaries will help decision makers feel confident and could even reveal opportunities to cede more power in the future as your practice grows. This allows you to communicate clearly with participants so that they do not lose trust in the process.

Participation benefits a foundation by ensuring grant decisions are more grounded in context, but ask yourself, how will it benefit those who join in and participate?

How can you be sure to cause no harm? How will you ensure people who become involved benefit from their experience?



If you are still having difficulty securing the agreement of decision makers, consider whether or not there are ways you can further limit the scope of your participatory philanthropy work in order to secure their commitment. For example, can you shift to a time-bound project or a smaller grant budget? If you need to make adjustments, apply the budget recommendations to ensure results will still justify your investment. Evaluate whether or not your work can still be considered participatory if you are using that terminology.

[See Glossary of Terms](#)

## Capacity and Time Constraints

People are often excited when starting their participatory philanthropy journeys, but planning overly ambitious or aggressive timelines for participatory work is a common pitfall that can lead to less-than-ideal results.

Q.

What requirements do you have for the timeline for your participatory philanthropy work, and do you truly have the capacity to implement your participatory philanthropy work within that timeline?

### Discussion Prompts

Has your organization already built up a substantial foundation of knowledge and a substantial network in the issue area you would like to influence?

If not, your planning and design phase should take at least several months to a year and will likely require significant resources, including staff and/or consultant time.

Is your organization committed to important principles that are relevant to your participatory work?

Examples of relevant principles are racial justice, disability justice, language justice, and gender justice.

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## Capacity and Time Constraints *(continued)*

### Discussion Prompts

What factors will influence the schedules and availability of potential stakeholders?

These may be seasonal considerations, a need for some folks to plan far in advance, or availability at certain times that may not align with a traditional work day. Ask your potential stakeholders before you assume you understand all the barriers and needs.

Do the project sponsors and key staff/consultants already have sufficient skill, knowledge, and awareness to begin to carry this work forward?

If not, plan time to build your team's capacity for this work before you move beyond the planning phase.

Are your estimates for how long it will take to complete work in each phase truly realistic?

You will want to take into account the complexity of your field of stakeholders, limits on their availability that may make it difficult to schedule things in a timely way, how the pace of your work with participants impacts project outcomes, overlapping phases of work that could stretch capacity, and scheduling dependencies.

### **Resources for Funders Ready to Go**

Sample templates (e.g., budgets and project outlines), practical tips, and other resources for when you are ready to start your participatory work

- Operating Budget Checklist
- Participatory Project Outline
- Sample Project Scope
- Project Roles
- Participant Compensation
- Conflicts of Interest
- Participatory Learning and Evaluation



If your organization is simply not ready to proceed or if you need to learn more before building your organization's capacity in the long term, consider funding intermediaries (i.e., community foundations or regranters) that use participatory processes to direct resources and/or join a funder collaborative that practices participatory grantmaking.

## Practitioner Skills

Below you will find a list of skills that practitioners utilize to deliver high-quality participatory processes.

### Discussion Prompts

How much capacity is there on your staff team in areas such as facilitation and group decision-making processes?

**Q.** Which are the areas where you might need to grow your team's capacity?

Do staff members have the interest and time to build up capacity in the short and/or long-term?

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## Practitioner Skills *(continued)*

### Discussion Prompts

In which areas might you be able to get external support or training?



Use this inventory to help assess what skills your organization has and might need.

#### Facilitation & group management

- ✓ Experience recognizing and mitigating bias in people and systems
- ✓ Practice of radical hospitality and inclusion
- ✓ Knowledge of care practices
- ✓ Competence in listening, paraphrasing, and holding multiple perspectives
- ✓ Facility with a wide range of decision-making tools and techniques
- ✓ Facilitation expertise specific to online or in-person environments, if required
- ✓ Comfort navigating and destigmatizing conflicts of interest
- ✓ General facilitation expertise, including difficult conversations and inclusive methods
- ✓ Understanding of “do no harm” principle as it relates to working with stakeholders outside of the foundation
- ✓ Knowledge of and comfort with exploring and navigating power dynamics

#### Analysis, influence & decision making

- ✓ Ability to thrive in complex multi-stakeholder environments
- ✓ Skill in leading through influence and by motivating others
- ✓ Facility with analyzing and synthesizing information from many sources
- ✓ Comfort with making decisions that involve trade-offs, guided by values

#### Philanthropy experience & commitment

- ✓ Knowledge of participatory philanthropy principles
- ✓ Knowledge of trust-based philanthropy principles
- ✓ Commitment to a grantee-centered approach at every stage of the process

#### Project management

- ✓ Strong project management skills, including scheduling expertise

#### Cultural & language competencies

- ✓ Skill navigating and managing multilingual environments
- ✓ Cultural competency, as relevant
- ✓ Multilingualism, as relevant
- ✓ Network weaving
- ✓ Willingness to experiment, innovate, fail, and learn
- ✓ Careful use of language that honors the intentions of participants
- ✓ Competence with disability accessibility, and inclusion

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

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



[Contact Katy](#)