

PARTICIPATORY GRANTMAKING IN THE JEWISH COMMUNITY AND BEYOND



Guides
for Intelligent
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MARCH 2022

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INTRODUCTORY LETTER

When Crown Family Philanthropies approached Jewish Funders Network (JFN) about commissioning a guide to participatory grantmaking (PGM), we jumped at the opportunity. This new, inclusive approach to grantmaking is increasingly popular in the mainstream philanthropic world, yet little known in the Jewish community, and we believe it will be of interest to many Jewish funders.

In publishing this guide, we are neither championing nor dismissing PGM. Rather, we are affirming that it is an important innovation in philanthropy, one that funders can use to varying degrees, and one that offers many potential benefits. In particular, PGM has the potential for strengthening grantmaker-grantseeker relationships and leading to more informed funding decisions, ones that incorporate the perspectives of the people and communities most affected by these decisions.

While PGM is indeed noteworthy, it is important to recognize that it will not appeal to all funders and that even those who choose to pursue it may find aspects of it both challenging and costly. As noted in this guide, PGM can be time- and labor-intensive, and it requires skillful facilitation. It is also a relatively young and untested practice, and much more evaluation, research, and experimentation will be required to determine its relative effectiveness. While PGM as it is currently defined is an emerging approach, some forms of "participatory grantmaking" have, in fact, been practiced by Jewish communities for centuries, from community councils in Eastern European *kehillot* to allocations committees in American Federations. A study of the successes and shortcomings of those practices can also be enriching.

One of the nice things about PGM is that it is not an all-or-nothing approach, and it offers a wide array of options and levels of intensity for funders who seek to make their grantmaking more participatory.

Our goal at Jewish Funders Network is to empower our members, and the broader Jewish philanthropic field, to be as strategic, generous, and impactful as possible. We do this by encouraging partnerships and collaborations, and by sharing information about needs, best practices, and the many tools and approaches that will help funders put their money to the best use possible and make the world a better place. In some cases, like this one, we can serve as "cultural translators," taking a trend from the secular world and exploring its relevance for the Jewish world.

We hope this report will be widely read and discussed and that it will inspire more experimentation and research in the practice of PGM. Whether or not you choose to incorporate PGM into your grantmaking, we hope reading this helps you clarify your philanthropic goals and strategies and encourages you to think deeply about how best to make, and evaluate, funding decisions.

We would like to thank the many people who participated in the birth of this project: The Third Plateau team did a stellar and very thorough job of researching and writing this report, and we

are grateful to the reviewers (listed on page TK) who took the time to read early drafts and offer valuable feedback.

On JFN's staff, Julie Wiener helped plan the scope of this project and edited multiple drafts, offering substantive feedback while also helping to ensure it would be a good read. Alana Rahmani helped manage the project's many moving parts. Most of all, we are grateful to the Crown Family Philanthropies for generously funding this project.

We are looking forward to hearing what you, the reader, think and to watching the Jewish PGM field continue to grow and develop. **To be kept up to date on Jewish PGM programming or to share your reactions to this guide, please email us at pgm@jfunders.org.**

Sincerely,

Andrés Spokoiny, President and CEO
Tamar Frydman, Senior Director of Programs
Jewish Funders Network
March 2022

PREFACE

Which individuals or groups are best qualified to make meaningful philanthropic impact in a given organization, community, city, or ecosystem, and in what contexts? This guidebook provides an overview of participatory grantmaking (PGM), a practice deeply connected to Jewish philanthropic values and with a [rich history](#), which offers a range of opportunities for grantmakers to incorporate and empower community voices in philanthropic decisions. PGM is a spectrum, ranging from integrating perspectives of those with lived experience to shifting decision-making power to the communities that grantmakers seek to support. It continues to gain attention from many corners of the philanthropic landscape.

PGM offers numerous benefits, but it also poses a number of dilemmas, so grantmakers will have varied reactions to it based on their values, priorities, and worldviews. We recognize PGM is not for every grantmaker. Still, as grantmakers consider how to be more effective, strategic, collaborative, and thoughtful about their philanthropy, we believe PGM is a valuable practice to explore and consider incorporating into their toolboxes.

We will discuss PGM's relevance for all grantmakers, with a particular focus on exploring how it might play a role in Jewish philanthropy. We also offer resources for those considering incorporating elements of PGM into their work. At a moment in time when many organizations and foundations are examining their roles in complex systems of power, it is our hope that the knowledge and ideas shared in the pages ahead will help grantmakers reflect on their own practices and explore the benefits and challenges of sharing power.

Much has been written on this topic by researchers, journalists, grantmakers, and those who practice PGM. This guidebook draws heavily on existing research, while adding a focus on implications for Jewish philanthropy. We would like to call special attention to three particularly useful publications. The authors of these pieces have consulted with numerous practitioners, carefully documented PGM in practice, and have compiled several of the most authoritative sources on PGM to date. We encourage interested readers to review the [Time-line of PGM Resources](#) at the end of this guidebook, and to consult the recently published "[Letting Go: How Philanthropists and Impact Investors Can Do the Most Good by Giving Up Control](#)," by Ben Wrobel and Meg Massey (2021); "[Deciding Together: Shifting Power and Resources Through Participatory Grantmaking](#)," a guide by Grantcraft authored by Cynthia Gibson and Jen Bokoff (2018); and "[Participatory Grantmaking: Has Its Time Come?](#)," funded by the Ford Foundation and authored by Cynthia Gibson (2017). These pieces are valuable for anyone interested in learning more.

Throughout our research into the highly collaborative world of participatory grantmaking, we have been met with generosity and support at every turn. Our conversations with passionate philanthropic, nonprofit, and Jewish communal professionals have helped us explore the spectrum of participatory practices within and beyond the Jewish grantmaking world. We are so fortunate to have been welcomed into the PGM space in this way and extend our deepest

gratitude to each of the interviewees who took time to share their perspectives and help us understand their work.

Thank you to Geoffrey Banks, Dr. Felicia Herman, Ilana Kaufman, Wendy Platt Newberger, and Kari Saratovsky for reviewing drafts of this guidebook and pushing us to think more critically and carefully. We would like to extend a special thank you to the team at Crown Family Philanthropies for taking the initiative to invite Jewish Funders Network to explore participatory grantmaking and for providing the financial support for this publication.

Finally, we offer our thanks and appreciation to the communities and individuals who have been practicing and advocating for greater participation in funding decisions long before our team began this learning process. We know there are many cultures that have been engaged with community philanthropy for decades and centuries, and that marginalized groups in the United States have long needed to rely only on themselves for support. The international effort to highlight and empower more voices would not be where it is today were it not for their ongoing and often underappreciated efforts.

With gratitude,



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EXECUTIVE SUMMARY

Overview

For millennia, Jewish religious tradition and communal leaders have put community philanthropy at the center of Jewish life. This ethos offers an important lens to explore participatory grantmaking (PGM), an increasingly popular and accessible approach to bridging the gap between grantmakers and those they serve, helping to include and/or empower the people affected by funding decisions to participate in the decision-making. **PGM creates opportunities for those closest to the community affected by grantmaking decisions to influence and, at times, direct the grantmaking process itself.** Just as Rabbi Hillel taught, “Do not separate yourself from the community ... and do not judge your fellow until you arrive at the same situation,”¹ PGM invites grantmakers to include more voices from the community in order to make better informed philanthropic decisions that are rooted in the needs of the community.

At a moment in time when many organizations and foundations are examining their roles in complex systems of power, it is our hope that the knowledge and ideas shared in this guidebook will help grantmakers reflect on their own practices and explore the benefits and challenges of sharing decision-making power. **Participation is not a binary – grantmakers need not either cede all power or none at all.** There are many ways to empower community voices throughout different stages of the grantmaking process, and PGM runs the gamut, from listening to community members, providing opportunities for participants to help set strategy, incorporating participant input during grant review, designating a number of voting committee or board seats for participants, to ceding grantmaking power to a participant committee.

PGM offers numerous benefits and dilemmas, so grantmakers will have varied feelings about the practice based on their values, priorities, and worldviews. For grantmakers considering how to be more effective, strategic, collaborative, and thoughtful about their philanthropy, PGM is a valuable practice to explore and consider incorporating into their toolboxes. **As you read the guidebook, we suggest you consider the following questions:**

- **In what circumstances, if any, might it make sense for your organization to incorporate greater “participant” input or decision-making power in your grantmaking?**
- **Who are the “participants” your organization might choose to engage in grantmaking?**
- **When you think about the communities, values, and cultural contexts of those making funding decisions and those receiving funds, how large or small is the experiential gap between them?**

¹ *Mishna Avot 2:4* (“Ethics of the Fathers”)

PGM Background and Jewish Philanthropy

In recent years, **rising wealth inequality, heightened societal focus on racial and economic justice, and the Covid-19 pandemic have sparked new scrutiny of the modern philanthropic enterprise, and have motivated many grantmakers to revisit how they approach funding.** Increased emphasis on transparency, collaboration, and accountability, in concert with a growing philanthropic emphasis on reflection, have contributed to increased exploration of participatory methods. In the North American Jewish community, many Jews of Color (JoC), Russian-speaking Jews, ultra-Orthodox populations, Mizrahi and Sephardi Jews, and other Jewish subpopulations have different narratives and experiences from those who are familiar with more mainstream Jewish communal organizations (e.g., youth group, camp, synagogue, Federation, etc.). Members of these groups are often overlooked or excluded from developing meaningful relationships with grantmakers because of these differences.

Both American Jewish philanthropy and participatory grantmaking are similarly rooted in community philanthropy, relying on individuals of and from the community to address collective needs. Whereas the origins of the Federation model were participatory in nature, today, Federations generally rely more heavily on individual donor generosity. Though many of those who sit on Federation allocations committees have firsthand experiences with organizations and communities that receive funding, **a more participatory model might invite more diverse members of Jewish communities, spanning income levels, race, denomination and observance level, language, and country of origin to play decision-making roles in some or all components of the funding process.** As the Jewish community continues to change in its communal priorities, racial identities, and political ideologies, the Jewish philanthropic landscape is ripe with opportunity to bring a more diverse Jewish population to the decision-making table.

Why Pursue PGM?

Participatory grantmaking benefits fall into two categories: process outcomes and grant outcomes. Process outcomes relate to *how* grants are awarded and focus on the changes in the skills, capacity, and relationships of both the individuals involved in decision-making and the grantmaking professionals – what they learn to do and how they build relationships and trust with one another. Grant outcomes relate to *which* grants are awarded and *how* effective they are. How attractive or persuasive each of these benefits may be depends heavily on *why* a grantmaking body pursues its work, what impact it seeks to have, and who it thinks is best equipped to achieve that impact.

MANY JEWS OF COLOR (JOC), RUSSIAN-SPEAKING JEWS, ULTRA-ORTHODOX POPULATIONS, MIZRACHI AND SEPHARDI JEWS, AND OTHER JEWISH SUBPOPULATIONS HAVE DIFFERENT NARRATIVES AND EXPERIENCES FROM THOSE WHO ARE FAMILIAR WITH MORE MAINSTREAM JEWISH COMMUNAL ORGANIZATIONS.

Champions of PGM say that its benefits include increased accountability, greater grantmaker-grantseeker alignment, better-managed expectations, innovation, flexibility, transparency,

cost-effectiveness, and solidarity.² PGM can rectify power imbalances and confer increased legitimacy on grant decisions.³ **PGM can close the experiential gap between grantmakers and grantseekers by increasing trust and improving relationships.** Empowering community voices also makes for a more transparent funding process, a key contributor to developing trust in organizational systems. PGM can expose grantmakers to leaders and nonprofits with whom they were not previously engaged. At its best, PGM helps strengthen the ecosystem of grantseeking organizations by increasing both their agency and philanthropic know-how. A need remains for greater data collection on the impacts of PGM on grant effectiveness.

Even those who are most enthusiastic about PGM acknowledge that it can add nuances and complexities that require additional time and resources. Exploring PGM requires certain mindsets, including openness to making mistakes, a commitment to ongoing learning, and a willingness to implement changes. These costs can be taxing for grantmakers, especially smaller shops that lack the staff capacity for additional responsibilities. **PGM may not be right for all foundations all the time, as it can be “complex, time consuming, expensive, and challenging.”**⁴ If a PGM process results in funding organizations that the grantmakers themselves would have supported anyway, those focused on grant outcomes may wonder if the time and resources were worth it.

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For first-time and repeat participant grantmakers, the PGM process involves similarly steep learning curves and demands significant time and staff capacity. PGM is a time-consuming process that can take busy activists, organizers, and community leaders away from the day jobs where they are needed. Navigating organizational differences, politics, and group decision-making processes requires patience, time, and adept facilitation. Learning about the grantmaking cycle and the numerous considerations that go into designing, implementing, and assessing philanthropic activity takes time and skill.

PGM Mechanics

For participatory grantmaking to be successful, grantmakers must first explore their own rationales for *why* they are interested in PGM and what they hope to accomplish through it. They must then consider what is to be gained and/or lost as a result, and may want to connect with other experimenting grantmakers to share best practices through the [PGM community of practice](#). The next step is to identify nonprofit leaders, researchers, community representatives, activists, or members of a specific locale, and decide at which stage(s) of the grantmaking process to involve them, and how. A skilled facilitator should inform or lead PGM processes because it requires adept navigation of group dynamics, honoring multiple viewpoints, steering discussion toward desired outcomes, holding space for processing, and

² “Who Decides? How Participatory Grantmaking Benefits Donors, Communities, and Movements,” The Lafayette Practice, no date given, <http://www.thelafayettepractice.com/wp-content/uploads/2014/04/Lafayette-Report.pdf>. Pgs. 16-29

³ Rose Longhurst, “Five reasons to support participatory grantmaking,” Alliance Magazine (blog), August 7, 2017, <https://www.alliancemagazine.org/blog/five-reasons-support-participatory-grantmaking/>

⁴ Gibson, “Participatory Grantmaking: Has Its Time Come?” Pg. 21



PHOTO COURTESY OF TZEDEK SOCIAL JUSTICE FUND

adapting to challenges and roadblocks in real time. Grantmakers can make space to discuss their motivations and desired outcomes openly, and invite feedback on them from the group of participants to help build more authentic relationships and trust at the outset.

Defining Success & Measuring Impact

There is limited available research directly measuring how PGM-funded organizational outcomes compare against traditionally-funded organizational outcomes, and questions remain about how to define PGM success, which key metrics are most relevant to track, and how to measure impact. **It is unclear to what extent traditional measurement and evaluation are appropriate for participatory practices or if PGM evaluations merit an approach that considers the impact on those involved in the PGM process.** Evaluators may want to consider what key problems the participants sought to solve, what they hoped to get out of engaging in the grantmaking process, and how they might have benefited or been affected by the process. Incorporating grant recipients in the design of evaluation processes can also help determine what impacts are really important to the community being served.

For grantmakers seeking to strengthen or expand their diversity, equity, and inclusion work, evaluating process outcomes can help demonstrate potential shifts in power dynamics, trust,

and dialogue with marginalized or underrepresented communities. While some may see the benefits of PGM as self-evident, for it to become a more widely accepted practice throughout the philanthropic sector, there will need to be a strong evidence base that it leads to more effective grantmaking.

Conclusion

Many questions about participatory grantmaking remain unanswered, both in the broader philanthropic sector and, more specifically, in the Jewish community. As such, **the Jewish philanthropic community has an exciting opportunity to collaborate, explore, test, and measure how PGM might benefit grantmaking, where its limitations lie, and which kinds of organizations are best suited to benefit from its practices.** Such endeavors would add valuable learning for Jewish grantmakers and all grantmakers interested in PGM, in the United States and abroad. With this in mind, we have listed several ideas for continued learning:

- Convening a collaborative of Jewish grantmakers who want to test out PGM and share their experiences through a community of practice
- Drafting lessons learned "by grantmakers, for grantmakers" from exploring PGM
- Commissioning research comparing PGM grant outcomes versus traditional grant outcomes
- Bringing in PGM consultants to navigate different scenarios and offer support as to how to get started
- Convening panels of PGM grantmakers and recipients to speak about their experiences

Whether or not PGM is right for your grantmaking organization at this time, it is our hope that this guidebook gives you an opportunity for pause and reflection: a chance to revisit the key values that inform your giving and the impacts you hope to have. Balancing internal goals, knowledge, and power with external experiences, priorities, and social movements is an ongoing dance, one that each grantmaker must perform for themselves, at their own tempo.

The Talmud speaks to the importance of balance between internal motivations with external relationships: Rabban Gamliel would permit into the hallowed study hall, the *beit midrash*, only students whose inner thoughts and feelings matched their outward-facing conduct and character – *tocho k'varo*.⁵ It is with this ethos that we believe participatory grantmaking can offer grantmakers a powerful opportunity to explore enhancing the parity between their work and the communities they serve, by looking in, and looking out.

5 Babylonian Talmud, Tractate Brachot, 28A

INTRODUCTION

For millennia, Jewish religious tradition and communal leaders have emphasized the importance of caring for vulnerable community members. From biblical commandments to medieval *tzedakah* (philanthropic) funds to 19th-century mutual-aid societies to modern day Federations, Jews across time and geography have made community philanthropy a central feature of Jewish life. Generations of rabbinic authorities have opined on how and when to give communal resources, exploring the different ways, detailing the community's obligations to build support systems for its members, and emphasizing each person's duty to participate according to their means.

The Jewish philanthropic ethos offers an important lens to explore participatory grantmaking, an increasingly popular and accessible approach to bridging the gap between grantmakers and those they serve, helping to empower the people affected by funding decisions to participate in the decision-making. Put simply, *PGM creates opportunities for those closest to the community affected by grantmaking decisions to influence, and at times, direct, the grantmaking process itself*. In practice, PGM can take many forms, including inviting organizational leaders, community members, activists, or experts to co-create funding strategies, develop grant proposals, inform or help decide grant decisions, and build evaluations. Just as Rabbi Hillel taught "Do not separate yourself from the community ... and do not judge your fellow until you arrive at the same situation,"⁶ PGM invites grantmakers to incorporate and empower more voices from the community to make better-informed philanthropic decisions, rooted in the needs of the community.

It is no secret that those in positions of philanthropic power often make more informed and more impactful funding decisions when they incorporate expertise outside of their own. Grantmakers have long relied on advisory committees, industry experts, board members from varied fields, review committees, and consultants to round out their own perspectives and shape philanthropic activity. A January 2021 survey of the largest foundations in the United States found that approximately 83 percent of foundations reported soliciting some form of *input* from the organizations they fund, and yet only 10 percent reported allowing grantees or community members most affected by the funding to *decide* how grant funds should be allocated.⁷ A significant gap often remains between the lived experiences, perspectives, understanding of need, and power of those making granting decisions and the organizations receiving funds (as well as the constituents served by those funds).

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⁶ *Mishna Avot 2:4* ("Ethics of the Fathers")

⁷ Kelly Husted, Emily Finchum-Mason, David Suárez. "Sharing Power? The Landscape of Participatory Practices and Grantmaking Among Large US Foundations," 2021. Pg. 3

What does PGM look like in the Jewish community, where grantmaker and grantseeker social relationships often overlap in communal spaces (e.g., synagogue, youth programs, cultural events), and grantmakers may have firsthand experience of programs they are funding? Despite these connections, there can still be ample distance between grantmakers and grantseekers such as age, participation in Jewish life, denominational affiliation, observance, income levels, race, language, and country of origin.

Distance can help a grantmaker to be neutral and driven by a bird's-eye view of the organizational ecosystem. While this vantage point can benefit grantseekers, there is a need to balance it with the perspectives and knowledge of those on the ground. This guidebook will provide a more detailed exploration of the various ways PGM can introduce such a balance. It's important to recognize that PGM need not be an all-or-nothing endeavor, but can be incorporated to varying degrees and can offer a new way of thinking. To what extent and at what stage(s) of the grantmaking cycle might we incorporate greater participation, and what is to be gained or lost by doing so?

To answer these questions, each funding organization must identify its "why," that is, the reasons, values, and motivations underlying its activities and funding priorities.

This guidebook is designed to provide the Jewish funding world and the broader philanthropic community essential information about participatory grantmaking, with ample opportunity for continued learning. The research for this project was guided by three key questions:

TO WHAT EXTENT AND AT WHAT STAGE(S) OF THE GRANTMAKING CYCLE MIGHT WE INCORPORATE GREATER PARTICIPATION, AND WHAT IS TO BE GAINED OR LOST BY DOING SO?

- **What models exist for participatory grantmaking, and how do philanthropic thought leaders approach it?**
- **Who in the Jewish philanthropic community engages in participatory grantmaking, and what is the landscape of this practice in Israel?**
- **What evidence exists about the benefits and limitations of participatory grantmaking, and what are the best practices and frameworks for measuring them?**

Methodology

To answer these questions, we reviewed over 50 reports, articles, op-eds, studies, and videos from the ever-increasing body of participatory grantmaking literature, most of which have been published within the past five years. We conducted 22 interviews representing a broad range of perspectives, including professionals employed by both national and local grantmakers, Jewish foundations and Federations, and participatory grantmaking practitioners and researchers. We also spoke with one grantseeker who received funding through participatory practices.

We invited a group of external reviewers to help ensure this guidebook would provide an accurate reflection of participatory grantmaking's history, ethos, opportunities, and challenges. These reviewers represent a broad range of professional perspectives and offer decades of experience from the nonprofit, philanthropic, and Jewish communal fields, including direct experience with participatory grantmaking. They provided invaluable feedback and guidance in shaping this report and were offered modest honoraria in appreciation of their time.

Terms

Participatory Grantmaking / PGM: The range of practices that help shift decision-making power over grantmaking to the very communities most affected by the grants⁸

Participant Grantmaker / Panelist: An individual who is not a professional grantmaker who takes part in a participatory grantmaking process. (e.g., nonprofit professional, community member, activist)

PGM Practitioner: A grantmaker that uses participatory grantmaking

Grantmaker: An individual or organization that allocates funding to nonprofit organizations and causes (e.g., community funds, foundations, Federations, and public charities.)

Grantseeker: An individual or organization that requests funding for their nonprofit or cause (e.g., executive director, development professional, community organizer)

Lived Experience: The knowledge, relationships, and familiarity one develops from being a part of a specific community or geography, often but not exclusively connected to a marginalized identity

Jewish Philanthropic Community: The network of Jewish grantmakers who give funds to organizations, causes, and communities in the Jewish world and/or beyond, often giving through a Jewish lens

How to Use this Guidebook

This guidebook is intended to help grantmakers learn about participatory grantmaking, reflect on their own funding priorities and practices, and incorporate participatory values and practices into their work, should they choose to. To that end, we have provided a synthesis of existing PGM research, ideas, practices, and outcomes, and have compiled several appendices with resources for any interested party.

Each section in the guidebook can be read as a stand-alone unit and thus certain terms and concepts are repeated. We have provided a brief overview of each section and its focus:

- **PGM Background** offers a working definition of PGM, details key moments in recent PGM history, and explores its increasing popularity in the philanthropic world.

⁸ Ben Wrobel and Meg Massey, *Letting Go: How Philanthropists and Impact Investors Can Do the Most Good by Giving Up*, Published independently, 2021. Pg. 50

- **PGM and Jewish Philanthropy** offers an overview of the participatory landscape in the North American Jewish community and in Israel.
- **Why Pursue PGM** explores the benefits and limitations of PGM processes and discusses the overlap between Jewish communal funding priorities and elements of the PGM approach.
- **PGM Mechanics** reviews different PGM models, details how to incorporate various participatory approaches, and provides suggestions and resources for doing so.
- **Defining Success and Measuring Impact** offers models for evaluation and outcomes assessment for participatory activities.
- **The Appendices** include a timeline of PGM resources, a list of possible evaluation questions, and a list of grantmakers using PGM.

Our review of the PGM landscape has helped us appreciate introspection as a necessary precursor to effecting meaningful change in grantmaking practices. The Jewish community is well-accustomed to this kind of self-examination, particularly preceding the High Holidays, a time of personal and communal reflection. Similarly, the participatory grantmaking ethos calls on us to conduct an institutional *cheshbon hanefesh* – an accounting of the funding organization's "soul."

The Jewish community has a powerful opportunity to explore how and in what circumstances participatory grantmaking might help funders meet tomorrow's most pressing needs. If you are reading this guidebook, we imagine you are curious about and possibly even eager to improve some component of how your grantmaking organization seeks to accomplish its mission. And so, we invite you to begin by looking inward, at your and your organization's approaches to achieving the impact you seek, and consider addressing the following questions to help you engage with the key issues that will come up in the pages ahead. It is our hope that by reflecting on these questions, you will be able to connect information about participatory grantmaking to your own organizational context.

- > **In what circumstances, if any, might it make sense for your organization to incorporate greater "participant" input or decision-making power in your grantmaking?**
- > **Who are the "participants" your organization might choose to engage in grantmaking?**
- > **When you think about the communities, values, and cultural contexts of those making funding decisions and those receiving funds, how large or small is the experiential gap between them?**

A group of people are sitting in a circle, holding hands, suggesting a community or collaborative effort. The image is overlaid with a semi-transparent red rectangle in the center, which contains the title text in white, uppercase letters. The background is slightly blurred, focusing attention on the hands and the text.

PARTICIPATORY GRANTMAKING: BACKGROUND

Community involvement in charity and resource allocation is an age-old practice spanning millennia and cultures worldwide; there is no one origin. The Babylonian Talmud describes two models for communal funds: one that any needy person may draw from on a daily basis (“*Tamchui*”) and one from which food is given out to the locale’s hungry residents each week, on the eve of the Sabbath (“*Kupah*”).⁹ In the 12th century, the rabbinic scholar Maimonides noted that “we have never seen or heard of a Jewish community that does not have a *tzedakah* [philanthropic] fund.”¹⁰ Throughout the Middle Ages, as Jews were forced to navigate unstable economic positions, insecure property ownership, and innumerable persecutions, massacres, and expulsions, their capacity for “rehabilitation and social regeneration [had] their basis in the broadening of scope and consistent application of charity.”¹¹

Many [indigenous groups](#) and [people of African descent](#) have deeply-rooted practices of sharing communal resources. In the United States, Black communities coordinated mutual aid societies such as the Free African Society (1780), The New York Society for Mutual Relief (1809), and numerous others to support “health and life insurance for their members—care of the sick, burials for the dead, and support for widows and orphans” and eventually education and job training.¹² Jewish immigrants to the United States established an extensive network of mutual aid societies.

These and other models of community-driven charity are rooted in two essential principles: Those within the community are accountable to support one another, and those within the community are most familiar with and thus best equipped to address the needs of the community. It is critical to note a key contextual factor in the emergence of these and many other community-driven funding practices: As marginalized members of the larger society, if these communities did not take care of themselves, no government or other economic powers would.

These same community-centered principles inform the participatory grantmaking ethos. Christy Prah, Program Director for Health and Human Services Grantmaking at Crown Family Philanthropies, noted that the most critical components of participatory grantmaking include “grantmaking that is centered around people and communities that the grants are serving. It not only elevates the voices of those with lived experiences, but cedes and shares decision making.”¹³ This approach closely echoes the most commonly used PGM definition.

⁹ Babylonian Talmud, Tractate Bava Batra, 8B

¹⁰ Maimonides, *Mishneh Torah*, Laws of Gifts to the Poor, 9:3

¹¹ Ben-Sasson, Haim H. “Charity.” *Encyclopedia Judaica*, Edited by Fred Skolnik and Michael Berenbaum, Second ed. Vol. 4, Macmillan Reference USA in Association with Keter Publishing House Ltd, 2007, p. 572. [http://www.jevzajcg.me/enciklopedia/Encyclopaedia%20Judaica,%20v.%2004%20\(Blu-Cof\).pdf](http://www.jevzajcg.me/enciklopedia/Encyclopaedia%20Judaica,%20v.%2004%20(Blu-Cof).pdf)

¹² “Mutual Benefit Societies, African American Community during Slavery, African American Identity: Vol. I, 1500-1865,” Primary Resources in U.S. History and Literature, Toolbox Library, National Humanities Center, March 2007, <http://nationalhumanitiescenter.org/pds/maai/community/text5/text5read.htm>

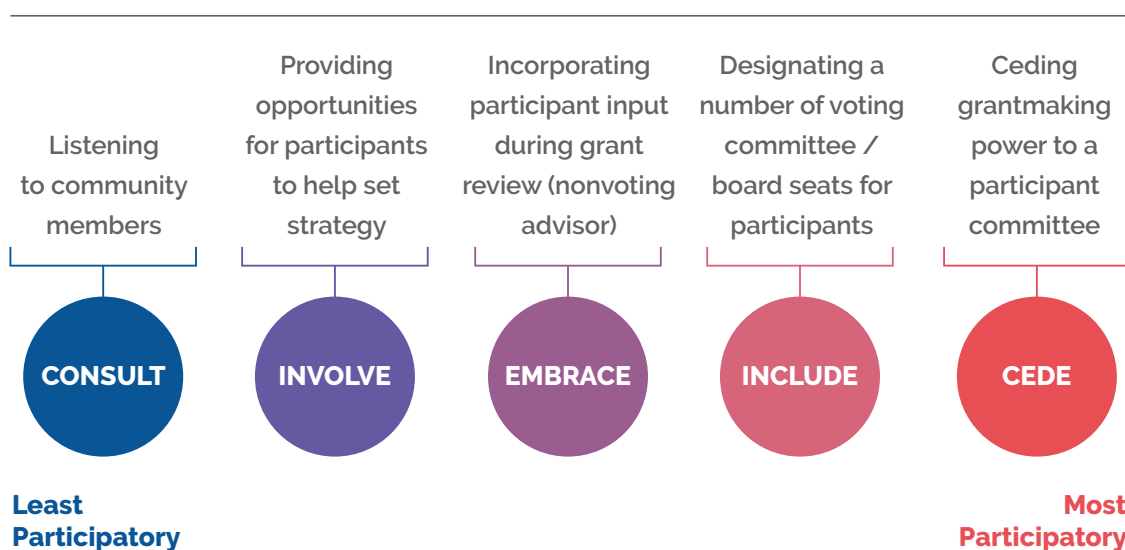
¹³ Christy Prah, interviewed by Third Plateau, September 2, 2021.

DEFINING PGM

Participatory grantmaking cedes decision-making power about funding decisions—including the strategy and criteria behind those decisions—to the very communities that a foundation aims to serve.¹⁴

Cynthia Gibson, the author of two comprehensive reports and numerous articles on the history, practice, and efficacy of participatory grantmaking, notes with Jen Bokoff in their 2018 report [“Deciding Together,”](#) that while there is “no formal definition, practitioners doing this work agree that it emphasizes ‘nothing about us without us,’” – a mantra most commonly associated with the disabilities rights movement that calls for decisions affecting a specific community to be made by members of that community – “and shifts power in grantmaking decisions from foundation staff to the people most affected by the issues.”¹⁵ Though there may be no “official” definition, it does seem that Gibson’s phrasing has been widely accepted since the time of publication. In their recently published book [“Letting Go: How Philanthropists and Impact Investors Can Do the Most Good by Giving Up Control,”](#) authors Ben Wrobel and Meg Massey rely on a similar definition, noting that “decision-making power over grantmaking or investing” must shift “to the very communities most affected” by those decisions.¹⁶

We will rely on Wrobel and Massey’s definition moving forward and offer an exploration into the spectrum of how and where funders can incorporate elements of PGM into different steps of the grantmaking cycle. We recognize that grantmakers may have varied reactions to this definition, based on their values, funding structure, and openness to sharing some of their grantmaking authority. At the same time, many grantmakers may already be incorporating some participatory practices, as depicted below:



¹⁴ Cynthia Gibson and Jen Bokoff, “Deciding Together: Shifting Power and Resources Through Participatory Grantmaking,” Grantcraft by Candid, October 2, 2018, <https://grantcraft.org/content/guides/deciding-together/?platform=hootsuite> (Pg. 8)

¹⁵ Gibson and Bokoff, Deciding Together, (Pg. 7)

¹⁶ *Letting Go*, Pg. 50

Participation is not a binary – grantmakers need not either cede all power or none at all. There are many ways to empower community voices throughout different stages of the grantmaking process. The key is to find room where funding processes can go a step “beyond simply institutionalizing the act of listening” and instead make “a structural change to give outsiders a voice in the process.”¹⁷

PGM'S ENTRY INTO FOUNDATIONS

Following the rise of individual wealth and the growth of private foundations throughout the 20th century, some activists and heirs to family fortunes coalesced in the 1970s to experiment with a new type of philanthropy. Ben Wrobel and Meg Massey detail the story of George Pillsbury, heir to the Pillsbury Company, who after graduating from Yale met other young heirs in Boston. Influenced by the social activism of the time, Pillsbury and his peers pooled resources to start a different kind of philanthropic enterprise. These wealthy individuals wanted to empower social activists to be decision-makers in receiving the funds they needed to advance their causes. Whereas previous generations “gave to the symphony,” Pillsbury and his peers invited activists to apply for grants that were ultimately approved by a regional community board of activists across New England.¹⁸ They called it the [Haymarket People's Fund](#), named in honor of “the 1886 working people's event in Chicago which paved the way to the 8-hour work day,” and it gave out over \$31 million through its participatory model.¹⁹ In the years that followed, similar community-based models emerged around the country, and some banded together to create The Funding Exchange, a network of community funds sharing resources and best practices.²⁰

Several decades later, the rise of the internet and resulting increase in information accessibility was accompanied by a cultural emphasis on transparency and desire to democratize philanthropy. Roughly 10 years into the Case Foundation's grantmaking, AOL Co-Founder Steve Case reached an important inflection point and decided to move away from “safer bet” support for legacy organizations such as the Boys and Girls Club or Habitat for Humanity. Instead he used technology to level the playing field so that more people could give to causes they care about. The Case Foundation developed and implemented the “Make It Your Own Awards” during the infancy of online giving platforms, whetting the philanthropic appetite for conversations around moving beyond “just investing dollars” to “involving people in a process.”²¹

¹⁷ Ibid. Pg. 49

¹⁸ Ibid. Pgs. 53-55

¹⁹ “Our Story,” Haymarket People's Fund, <https://www.haymarket.org/our-story>

²⁰ After several decades of collaboration, The Funding Exchange voted to disband in 2013. See “Change, Not Charity: The Story of the Funding Exchange” for a comprehensive account of the organization's work, successes, challenges and lessons learned.

²¹ Kari Saratovsky, interviewed by Third Plateau, September 27, 2021.

The "Make It Your Own Awards" provided a form of contest-philanthropy and represented a crucial step toward including community voices in philanthropic decision-making, with the ideas that got the most public votes receiving some investment from funders. Kari Saratovsky²² worked at the Case Foundation and helped oversee the "Make It Your Own Awards" with Cynthia Gibson, the aforementioned author of numerous reports on participatory grant-making. Saratovsky described the "Make It Your Own Awards" as "participatory in every stage," gathering public perspectives before the request for proposals (RFP) was released, involving peer reviewers to give feedback, and including the public in selecting the pool of finalists. Expert judges selected the top 20 winners, the Case Foundation vetted the finalists, and online community voting determined the final four winners.²³ Though in 2022 many similar funding and crowdsourcing initiatives exist, in 2007, when the Case Foundation launched these awards, "it turned philanthropy on its head."^{24,25}

Between 2007 and 2020, numerous domestic and international mission-focused funds were established by activists, organizers, and grantmakers interested in exploring participatory models. They sought to pool resources for marginalized, disadvantaged, and oppressed minorities, often in developing countries, and to empower them to make funding decisions that would impact their own lives. These funds are often cited as PGM leaders in that they are truly by and for the people they aim to serve, and raise capital from individuals and larger institutional donors to do so. Examples include the [Disability Rights Fund](#),²⁶ the [Edge Fund](#), and [FRIDA](#), which "provides young feminist organizers with the resources they need to amplify their voices and bring attention to the social justice issues they care about."²⁷ In the last five years, an increasing number of American foundations have explored how they might involve or increase participation in their grantmaking, a phenomenon accelerated by the changing social and political priorities of this time.

TODAY'S CLIMATE

In recent years, rising wealth inequality, heightened societal focus on racial and economic justice, and the Covid-19 pandemic have sparked new scrutiny of the modern philanthropic enterprise, and have motivated grantmakers to revisit their approach to funding. Recent publications like Edgar Villanueva's "[Decolonizing Wealth](#)" and the Groundswell Fund's "[Open Letter to Philanthropy, from People of Color-led, Movement-accountable Public Foundations](#)" call for a fundamental reallocation of resources. At the same time that wealth has become increasingly concentrated in the hands of ultrahigh-net-worth individuals, small- to mid-size

²² Previously a Principal at Third Plateau Social Impact Strategies (the researchers and authors of this publication), most recently President and CEO at Jewish Federation of Greater Houston, and a reviewer for this guidebook.

²³ [Click here for the full evaluation report](#) of the Make It Your Own awards, "Citizen-Centered Solutions."

²⁴ Kari Saratovsky, interviewed by Third Plateau, September 27, 2021.

²⁵ For other examples of crowdsourced grantmaking, see "[Social Compact in a Changing World](#)" Pg. 22

²⁶ Since 2008, the Disability Rights Fund has distributed more than \$38 million in grants to over 300 organizations of persons with disabilities across 34 countries. <https://disabilityrightsfund.org/announcement/>

²⁷ "About Us," FRIDA, <https://youngfeministfund.org/about-us/>

individual giving has declined.²⁸ Many observers have expressed alarm that this consolidation of financial power will further perpetuate social and racial inequities.

The murder of George Floyd and racial justice protests that followed it have placed renewed and heightened attention on the funding disparities that have chronically and systematically disadvantaged Black people, indigenous people and People of Color, and have prompted a reckoning with the philanthropic sector's role in maintaining unequal structures.²⁹ In a July 2021 article for *Inside Philanthropy*, writer Mike Scutari noted how, as a result of these trends, philanthropic leaders "...are now giving participatory grantmaking a second look, drawn to its ability to build trust with historically underserved demographics, demystify philanthropy, and rebalance longstanding power dynamics."³⁰

In 2017, Cynthia Gibson described "a pronounced shift from hierarchical systems...to streamlined systems that allow for collaboration, openness, and horizontal decision-making" across industries, and an increase in technological innovations that allow for real-time organizing, communication, and coworking.³¹ This trend has only intensified throughout the Covid-19 pandemic, as organizations in all sectors have had to navigate collaborating online, rather than in-person. Increased emphasis on transparency, collaboration, and accountability, in concert with increasing philanthropic pressure and motivation to reflect, have contributed to a field-wide increase in exploration of participatory methods.

The Jewish philanthropic community wrestles with many of the same issues facing the broader philanthropic community. Though Jewish grantmaking professionals and those seeking funds at times share a cultural and communal proximity (e.g., "Her daughter is my child's teacher;" "We go to the same synagogue;" "I went to camp with her dad;" "We were in youth group together;" etc.), substantial differences in power, relationships, and lived experience can impede the grantseeker's ability to access funds and limit the grantmaker's potential for impact. Many Jews do not participate in organized Jewish life and thus lack access to these relationships.³² Moreover, many Jewish foundations also give to secular causes where they may have greater distance from those "on the ground."

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²⁸ "Anticipate & embrace what's next: 11 Trends in Philanthropy for 2021," Dorothy A. Johnson Center for Philanthropy, January 19, 2021, <https://johnsoncenter.org/wp-content/uploads/2021/01/11-Trends-for-2021-WEB.pdf> Pg. 6

²⁹ Ibid. Pg. 7

³⁰ Mike Scutari, "We Set the Priorities Ourselves: How Sex Workers Lead This Participatory Grantmaker's Global Giving," *Inside Philanthropy*, July 26, 2021, <https://www.insidephilanthropy.com/home/2021/7/26/we-set-the-priorities-ourselves-how-sex-workers-lead-this-participatory-grantmakers-global-giving>

³¹ Cynthia Gibson, "Participatory Grantmaking: Has Its Time Come?" Ford Foundation, October 2017, <https://www.ncfp.org/wp-content/uploads/2020/08/Participatory-Grantmaking-Has-Its-Time-Come-Fdn-2017.pdf> pg. 8

³² Pew Research Center, "Jewish Americans in 2020," May 11, 2021, Pgs. 23, and 109



Legacy funders and institutions have increasingly begun to confront their own biases, assumptions, and racism regarding “who counts” as a Jewish person, including focusing on more diverse audiences. Isaac Luria, Director of Voice, Creativity, and Culture at the Nathan Cummings Foundation, notes how the professionals making granting decisions are often too far removed from Jews who are in interfaith families, are economically marginalized, or are members of racially diverse Jewish communities. He describes how there are important differences related to gender, race, and economic class that affect how Jewish grantmakers and Jewish grantseekers interact.³³ In the North American Jewish community, Jews of Color, Russian-speaking Jews, ultra-Orthodox populations, Mizrahi and Sephardi Jews, and other Jewish subpopulations have different narratives and experiences from those who are familiar with more mainstream Jewish communal organizations (i.e. youth group, camp, synagogue, Federation, etc.). Members of these groups are often overlooked or excluded from developing meaningful relationships with funders because of these differences.

Though there have always been Jews of Color (JoC) in the United States, in the past five years, they have organized, launching new nonprofits for the JoC community, and creating opportunities for JoC to convene at an accelerated rate. This phenomenon is due in no small part to the work of Ilana Kaufman³⁴ and her colleagues at [The Jews of Color Initiative](#), who, backed

by several national Jewish funders, lead a “national effort focused on building and advancing the professional, organizational, and communal field for Jews of Color.”³⁵ This initiative and myriad partner organizations in the Jews of Color space see the values of justice, equity, and empowering communities to make philanthropic decisions as central to their missions.

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Whereas 10 years ago PGM received little attention in mainstream philanthropic discourse, in the past three years, reports from [Deloitte's Monitor Institute](#) (2021) and [Rockefeller Philanthropy Advisors](#) (2019) point to the importance of including participation in grantmaking decisions. As will be discussed later in this guidebook, the Ford, Hewlett, MacArthur and Crown foundations have also invested staff and capital into researching and employing participatory methods. We do not mean to imply that PGM should be viewed as more legitimate or worthwhile because large foundations and consulting firms have taken notice. Rather, the fact that legacy institutions with influence

and power have named the importance of participatory practices shows the increasing attention and relevance PGM has earned, thanks to the advocates, practitioners, organizers, and writers who have long championed the cause.

³³ Interview, Isaac Luria, Third Plateau, October 13, 2021

³⁴ Executive Director of the Jews of Color Initiative and a reviewer for this guidebook. Previously Public Affairs and Civic Engagement Director at the Bay Area Jewish Community Relations Council and Program Officer at the San Francisco Jewish Community Federation and Endowment Fund

³⁵ “What We Do,” Jews of Color Initiative, <https://jewsofcolorinitiative.org/what-we-do/>

A photograph showing the hands and forearms of a diverse group of people stacked together in a circle. The hands are of various skin tones and are wearing different colored sleeves, including white, blue, and patterned fabrics. The background is a warm, wooden floor. A semi-transparent red rectangular overlay is positioned in the upper half of the image, containing the title text in white.

PARTICIPATORY GRANTMAKING AND JEWISH PHILANTHROPY

Participatory grantmaking and Jewish philanthropy share fundamental values; there is a long history of PGM-like giving in the Jewish community. And, there exist ample opportunities throughout the Jewish funding landscape for increased participation. Though many Jewish grantmakers are committed to increased diversity, equity, and inclusion efforts, we found few who view their philanthropy as participatory grantmaking *per se*. This chapter will explore several Jewish communal institutions and the landscape of Israeli philanthropy as they relate to PGM and will pose questions for reflection to help readers use the contents to inform practice.

ROOTS

The Talmud describes how community funds were distributed to the locale's poor by charity wardens, who were well-known and trusted members of the community.³⁶ No fewer than three wardens were required to distribute both emergency funds and food, to ensure this communal duty was not centralized with any one person.³⁷ Both American Jewish philanthropy and participatory grantmaking are similarly rooted in community philanthropy, relying on individuals of and from the community to address collective needs. Guided by this tradition and responding to social exclusion from American institutions and opportunities, Jewish immigrants to the United States developed associations and organizations to support their own.

Dr. Felicia Herman,³⁸ a scholar of American Jewish history who has worked in Jewish philanthropy for 20 years, notes that the American Jewish philanthropic and communal infrastructure traces its roots to the promise that the first Jews who arrived in New Amsterdam in 1654 made as a condition of their settlement: that they would take care of their own and not become a burden to the community. Drawing on historical models of communal care and the requirements – and values – of *tzedakah*, American Jews pooled their resources to support one another, developing their own networks to care for the needy. This agreement “formed the bedrock of the Jewish philanthropic and communal infrastructure in America, which expanded in size and complexity as the Jewish population grew.”³⁹

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³⁶ “Charity (Tzedakah): Charity Throughout Jewish History,” Jewish Virtual Library, no date given, <https://www.jewishvirtuallibrary.org/charity-throughout-jewish-history>

³⁷ Babylonian Talmud, Tractate Bava Batra, 8B

³⁸ Dr. Herman is also Managing Editor of SAPIR and a Reviewer of this Guidebook

³⁹ Felicia Herman, “Jews with Money,” Tablet Magazine, July 25, 2021, <https://www.tabletmag.com/sections/community/articles/jews-with-money-lila-corwin-berman-jewish-philanthropy>

Between 1880 and 1920, Jewish Americans established mutual aid societies called “Landsmanshaften” to help support the influx of Eastern European Jews arriving to the United States. By 1892, more than 80 such organizations existed in New York City alone, each focusing on Jewish immigrants from a specific town of origin. By 1910 that number had grown to more than 2,000, representing people from hundreds of European cities and towns.⁴⁰ These societies pooled members’ resources to help immigrating “Landsman” (“Countrymen”) resettle and procure basic needs. Their motivation and success were rooted in the members’ shared backgrounds (Jewish, Eastern European descent) and shared experiences (oppression, seeking refuge, immigration).

FEDERATIONS

Similar to mutual aid societies in mission but larger in scope, the first Jewish Federation was founded in Boston in 1895 to pool Jewish community resources for distribution to immigrants and others in need. By consolidating the efforts of different fundraising and relief organizations, the Federation aimed to address the Jewish population’s health, social, and welfare needs at the community level.⁴¹ In the decades that followed, Jewish communities in other cities took note and established their own Federations, which helped shape modern-day American philanthropy.⁴² Today, the Jewish Federations of North America represent 146 Federations and more than 300 communities in the United States and Canada that collectively raise and distribute more than \$3 billion annually through annual campaigns, planned giving, and endowment programs.⁴³

Federations have adapted their funding priorities as the needs of the Jewish community have evolved. Isaac Luria, Director of Voice, Creativity and Culture at the Nathan Cummings Foundation described how during the early days of the Federation model, “everyone in the community had a role and there were public conversations about where resources were directed,” highlighting the community-driven approach to allocation.⁴⁴ Over time, most Federations have transitioned to leveraging committees of major donors to vote on community funding decisions. At UJA-Federation of New York, fundraising professionals liaise with major donors to invite them to join a committee based on their area of interest, where they volunteer and serve for approximately three years.

Federation grant committees around the country are similarly populated by donors committed to using their wealth to better the Jewish community and public good. Whereas the

⁴⁰ Egon Mayer, “The Production of Philanthropy: A Case Study of the Imagery and Methodology of Jewish Fundraising,” Center for the Study of Philanthropy, 2001, http://www.philanthropy.org/documents/FG_TheProductionofPhilanthropyACaseStudyoftheImageryandMethodologyofJewishFundraising.pdf

⁴¹ Donald Feldstein, “The Jewish Federation: The First Hundred Years” In N., Linzer., D.J. Schnall, J.A. Chanes(eds.). *A portrait of the American Jewish community*. 1998, Praeger Publishers. Pg. 70.

⁴² Founded in 1913, the Cleveland Foundation is viewed as one of the United States’ oldest public charities, and was modeled after the Jewish Federation. See <http://www.clevelandfoundation100.org/foundation-of-change/invention/introduction/>

⁴³ “About JFNA,” The Jewish Federations of North America. <https://www.jewishfederations.org/about-jfna>

⁴⁴ Interview, Isaac Luria, Third Plateau, October 13, 2021

Federation's origins were participatory in nature, today, the model generally relies more heavily on individual donor generosity. It is important to consider how one is asked to join such a committee, what perspectives committee members bring, and what infrastructure

may or may not exist to ensure community-wide representation. Though many who sit on Federation grant committees certainly have firsthand experiences with organizations and communities that receive funding, a more participatory model might invite more diverse members of Jewish communities, spanning income levels, race, denomination and observance level, language, and country of origin to play decision-making roles in some or all components of the funding process.

THOUGH MANY WHO SIT ON FEDERATION GRANT COMMITTEES CERTAINLY HAVE FIRSTHAND EXPERIENCES WITH ORGANIZATIONS AND COMMUNITIES THAT RECEIVE FUNDING, A MORE PARTICIPATORY MODEL MIGHT INVITE MORE DIVERSE MEMBERS OF JEWISH COMMUNITIES.

In Alabama, the Jewish Federation of Birmingham is seeking to increase communal representation across many of its practices. Under the leadership of Danny Cohn, the Federation convened an allocations process committee as part of its strategic planning. The committee was populated by a wide range of community members, selected for their experiences, skills, and ability to consider and act upon changes to existing allocations that might allow the Federation to better serve the Birmingham Jewish community. Similarly, the Federation's board has been structured to be representative of

the Birmingham Jewish community. In both instances, Cohn's priority was "equal representation" from the community, as opposed to a minimum gift amount. He shared that "When you put a dollar amount on something you automatically exclude those from the table who may be able to further your organization."⁴⁵ He notes that for central convening bodies of intermediate and smaller communities, representation has to be prioritized over financial contributions to make decisions effectively that ensure the viability of the community.

SPOTLIGHT: TZEDEK SOCIAL JUSTICE FUND

For the better part of 30 years, Amy Mandel has been on a philanthropic journey of learning and reflection. In the mid-1980s, with funds made available by her parents, Cleveland philanthropists Barbara and Mort Mandel (of the Barbara and Morton Mandel Family Foundation and the [Jack, Joseph and Morton Mandel Foundation](#)), she started giving to values-aligned nonprofits and eventually joined with her partner, Katina Rodis, to establish the Amy Mandel and Katina Rodis Fund. Mandel was living in Boston and attended conferences of the Haymarket People's Fund (the collective co-founded by George Pillsbury and others with inherited wealth noted earlier in this report) and the Funding Exchange, where she got to know a growing network of participatory grantmakers backing grassroots social justice movements.

⁴⁵ Interview, Danny Cohn, Third Plateau, January 24, 2021

In the late 2000s, she reassessed her funding priorities and doubled down on supporting nonprofits advocating for LGBTQ rights and both Jewish and broader-sector organizations fighting for social justice.⁴⁶

Mandel hired Jennifer Langton in 2011 to develop relationships with grantees and organize the grantmaking process. In 2012, the fund launched a social justice leadership development program in Asheville, North Carolina, initially for young Jewish leaders, based on Jewish values and committed to empowering the LGBT community, and other marginalized communities.⁴⁷ They called it the Tzedek Social Justice Residency, after the Hebrew word for "justice" or "charity," and recruited aspiring nonprofit professionals to work with grantee organizations while participating in a cohort, attending conferences, and developing skills. Over time, the fellowship focused more deeply on social justice alongside LGBTQ justice, racial justice, and combating antisemitism.⁴⁸

The political events of 2016 led to important reflections from the fund's leadership and pivotal conversations about their path forward. [As someone who had experienced antisemitism, homophobia, and ableism](#), Mandel increasingly prioritized centering the voices of the community her fund aimed to support in the battle against racism and other forms of oppression. Because she was a beneficiary of generational wealth, she recognized the limitations of her own perspective in addressing systemic issues of race, class, privilege, and power. She became increasingly aware of "inequities in the philanthropy system," learning from grantees about practices that felt "extractive," that is, demanding of performance, metrics, outcomes, and foundation-driven priorities, as opposed to supportive or rooted in relationship.⁴⁹

In 2017, noting that its staff was made up entirely of white women whose lived experiences differed dramatically from many of the grantees, the fund conducted an equity audit with the [Ad-away Group](#), which reviewed its grantmaking practices and interviewed diverse stakeholders, including grantee partners. The fund ultimately concluded that greater impact and expression of its social justice values required its work to be informed by the strategy and leadership of organizers and activists of color in the Asheville community. As a result, in 2018, Mandel and her team paused the Fellowship "to assess, evaluate, and do internal work as an organization on structural racism, class, disability ... to provide an even better program going forward."⁵⁰

⁴⁶ Interview, Amy Mandel, Third Plateau, November 17, 2021

⁴⁷ Seth Chalmer, "Member Spotlight: The Amy Mandel & Katina Rodis Fund," Jewish Funders Network, September 22, 2015, https://www.jfunders.org/member_spotlight_the_amy_mandel_katina_rodiss_fund

⁴⁸ Amy Mandel, Jennifer Langton, Marsha Davis, Lindsay Majer, Heather Laine Talley, "Pause for the Cause Update," Tzedek Social Justice Fund, August 27, 2018, <https://tzedeksocialjusticefund.org/pause-for-the-cause-update/>

⁴⁹ Interview, Amy Mandel, Third Plateau, November 17, 2021

⁵⁰ Amy Mandel, "Pause for the Cause Update," Tzedek Social Justice Fund, October 26, 2017, <https://tzedeksocialjusticefund.org/pause-for-the-cause/>



PHOTO COURTESY OF THE JEWISH TEEN EDUCATION AND ENGAGEMENT FUNDER COLLABORATIVE AND 4FRONT BALTIMORE

To help better align the fund's processes and funding decisions with the realities of its grant-seekers, in 2018 and 2019, the fund worked with consultants to help its staff build relationships with the fund's expanding network of grant recipients and focus on the fund's internal culture. Additionally, it completed a community-based research process to gather perspectives about how the fund could best serve Asheville communities via grantmaking and programming. The fund also solicited grantee feedback about what it was like to work with it.⁵¹ The fund went through a values and vision clarification process, rooted in Mandel's funding priorities and incorporating staff buy-in to arrive at a set of guiding organizational values. It developed relationships with 11 trusted advisors from the Asheville social justice community, some of whom were grantees, who met monthly to inform the organizational visioning process. The values and vision, in concert with the findings from the research, became the foundation for the fund's strategic plan.⁵² In 2020, the team formally renamed the fund the [Tzedek Social Justice Fund](#).

⁵¹ "Amy's Story: Using Privilege to Promote Equity Part TWO," Tzedek Social Justice Fund, February 28, 2019, <https://tzedeksocialjusticefund.org/amys-story-using-privilege-to-promote-equity-part-two/>

⁵² Interview, Amy Mandel, Third Plateau, November 17, 2021

Throughout this highly intentional process, Mandel examined the perspectives, lenses, and positions of power that informed how she approached philanthropy, and took stock of how those things influenced the fund and its grantmaking decisions. She asked herself, “Why are we not listening to the people doing the work?” During one videoconferenced team meeting, she was able to step back and reflect on the group’s dynamics: “I was watching what was happening in the Zoom room: These are wonderful, skilled, pretty brilliant people who were also closer to the ground. I was watching that everyone was orienting to me and my reactions to various suggestions – I had the power still as the funder and as their boss. There wasn’t a way to equalize that without stepping back.”

Mandel ultimately concluded that as a wealthy white person trying to ally with communities of color, she was not the right person to solely direct funding decisions. This move did not come lightly – “it was hard but also so right. It felt good.” She saw that the team would flourish if she wasn’t in the room, and that they would be empowered to take bolder action. What Mandel concluded for herself echoes the advice Geoffrey Banks of the MacArthur Foundation shared in an interview with us, that “it is necessary to extricate yourself from the process and give up power in order to allow for the changes you want to see happen to happen.”⁵³ Mandel stepped away as Tzedek’s board chair at the end of 2020 and supported a new board of trustees, all of whom were community leaders from Asheville. Shortly thereafter, *Tzedek* hired a former grantee and community advisor as the new Director of Community-led Grantmaking and rolled out a participatory grantmaking model in 2021.

SPOTLIGHT: THE JEWS OF COLOR INITIATIVE

Launched in 2017, the Jews of Color Initiative “hosts the nation’s first-ever philanthropic and capacity building fund expressly dedicated to supporting Jews of Color.”⁵⁴ Executive Director Ilana Kaufman (who also served as a reviewer of this guidebook) explained that, at the outset, white funders were uncomfortable making granting decisions on behalf of Jews of Color (JoC) and sought to divest their power to the JoC they wanted to support. The Jews of Color Initiative met this need by populating its grant advisory committee entirely with JoC. In the Initiative’s first year, the members of the grant advisory committee were also the grantees, and thus needed to explore a shared decision-making process to allocate resources by and for their communities.

As the Initiative has grown, advisory committee members are still exclusively Jews of Color leaders from across the organizational landscape. Though members cannot sit on the committee and receive grants in the same year, Kaufman noted that the Initiative has a “lighter lift” building trust with grantseekers than other grantmakers do because the diverse racial identities and lived experiences of those making the grant decisions are proximate to those of the

⁵³ Interview, Geoffrey Banks, Third Plateau, October 5, 2021

⁵⁴ “What We Do,” Jews of Color Initiative, <https://jewsofcolorinitiative.org/what-we-do/>

Jews of Color seeking grants.⁵⁵ Unlike other grantmakers, they have not felt the need to seek out or build relationships with more Jews of Color, because their leadership and grant-makers are already deeply rooted in JoC communities. They are connected throughout JoC networks that inform every aspect of how the grantmaking process has been built and is carried out.

In light of the clear alignment between the Initiative's funding ethos and PGM's values, we wanted to understand why there has not been a more formal attempt to incorporate increased participation in the Initiative's grantmaking. Kaufman's response both highlights some of the aforementioned challenges of adopting PGM and may be instructive for grantmakers interested in incorporating more participatory practices. The Jews of Color Initiative has limited staff capacity and has been primarily focused on building its own operations, securing and allocating funds, and building the field of Jews of Color. Were a donor to endow the Initiative and thus obviate the ongoing pressure to secure funds, "we would absolutely rethink our grantmaking strategy and consider participatory grantmaking," said Kaufman.⁵⁶

THE JEWS OF COLOR INITIATIVE'S LEADERSHIP AND GRANTMAKERS ARE ALREADY DEEPLY ROOTED IN JOC COMMUNITIES.

Given the Initiative's need to maintain fiscal stability and carefully manage its resources and capacity, adopting PGM would be costly from a time and human capital perspective without a compelling value-add, since the Initiative is already deeply connected to its audiences. Nonetheless, the Jews of Color Initiative recognizes the importance of increasing participation and "would love to be a laboratory for that space," Kaufman said.⁵⁷

JEWISH TEEN PROGRAMS

Funders and program providers in the Jewish teen engagement space have long championed the importance of putting teens in the driver's seat of their own activities. For decades, [The B'nai Brith Youth Organization](#) (BBYO) has operated on the premise that empowering teens to run their own youth group chapters, elections, events, conventions, and programming will lead to more participant buy-in, a greater sense of belonging, and more effective outcomes. The establishment of the Jewish [Teen Education and Engagement Funder Collaborative](#), a group of grantmakers from 10 cities across the United States who invest in their local Jewish teen programming and adopted shared measures of success to assess the impacts, was rooted in "privileging the voices, needs and interests" of Jewish teens and their families.⁵⁸

⁵⁵ Interview, Ilana Kaufman, Third Plateau, October 14, 2021

⁵⁶ Ibid

⁵⁷ Ibid

⁵⁸ "Signs Along the Way: A Funder Collaborative Assesses its Influence," Jewish Teen Education and Engagement Funder collaborative and Rosov Consulting, June 2020
<http://www.teenfundercollaborative.com/wp-content/uploads/2020/07/FC-Case-Study-3-Final-20200603RC37745.pdf> Pg. 8

Recognizing the ongoing importance of empowering teens to be co-creators of their own programs, the collaborative adopted the “nothing about us without us” ethos, exemplified by Baltimore’s JCC, which has reserved two permanent spots on its board for teens, and by the San Francisco Federation’s Innovation Accelerator, “for which applicants must demonstrate the ways in which teens were involved in the design of the program.”⁵⁹ Before the Covid-19 pandemic, funders in Los Angeles, San Diego, Baltimore, Cincinnati, and Boston directed grants to teens to design and implement peer-to-peer programming, and in some instances, employed teen selection committees to assess funding eligibility.⁶⁰

Giving teens a role in planning their own programs may in part be a way to channel their developmental needs for independence and self-governance into Jewish engagement. Nonetheless, these practices have found success because it is often the teen participants who are best equipped to assess, describe, and oftentimes act on their demographic’s needs, even though adult supervision and involvement is at times necessary. As noted earlier, the process of sharing power with teens is itself a key part of the learning.

RECOGNIZING
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“NOTHING ABOUT US
WITHOUT US” ETHOS.

PGM IN ISRAEL

The Israeli philanthropic sector is younger and less developed than its counterpart in the United States. Sigal Yaniv Feller, Executive Director of the Jewish Funders Network Israel, shared with us that there is no such legal entity as a foundation in Israel.⁶¹ Israelis may choose to give directly to an organization out of pocket, create a nonprofit that then awards funds to grant-seekers, or establish a donor-advised fund (a new option, created by JFN and several partners in 2019, and which has [more restrictions](#) than the U.S. equivalent). Grantmaking in Israel is less formal than in the United States: Many funders lack staff and boards. When boards do exist, it is rare for grant recipients to sit on the boards of the organizations that fund them.

Talia Horev is the Director of the Forum of Foundations in Israel, a community of 90 foundations from Israel and abroad who network and collaborate to benefit Israeli society. She shared with us that while grantseekers are at times consulted and work collaboratively with the grantmaker in the development of the funding proposal, it is rare to find a funder in Israel that engages grantseekers in decision-making or grantmaking.⁶² It seems that participatory grantmaking as defined by and discussed in this report is not yet a known practice within Israeli philanthropy.⁶³

⁵⁹ Ibid, Pg. 9

⁶⁰ Ibid, Pg. 10

⁶¹ Interview, Sigal Yaniv Feller, Third Plateau, October 4, 2021

⁶² Interview, Talia Horev, Third Plateau, October 14, 2021

⁶³ Interview, Sigal Yaniv Feller, Third Plateau, October 4, 2021

This is not to say that grant-givers do not recognize the importance of identity and lived experience in their grantmaking. Yaniv Feller described “a foundation that works in the Arab sector and made a point to hire three Arab grant officers” because of their relevant and community-informed perspectives. Similarly, “a foundation that works with disabilities will try to hire people with disabilities to make sure they have direct experience with population they’re trying to serve.”⁶⁴

Thanks to Israel’s relatively small population and compact geography, Israeli grantmakers often have very close relationships with grantseekers. These relationships can evolve into funding opportunities in a fluid way. This is in contrast to more formal processes common in the United States and Canada, where many foundations accept funding proposals only at specific times of the year. In Israel, the process is more open, Yaniv Feller reported.⁶⁵ Israeli funders who do hire staff to support their giving efforts are often already intimately connected with a specific cause or community (e.g., youth engagement) and have the relationships and geographic proximity to explore the funding landscape.⁶⁶

Though our research did not formally explore participatory grantmaking in Arab and Palestinian communities, one Palestinian fund appeared repeatedly in the PGM literature and merits special mention here. The [Rawa Creative Palestinian Communities Fund](#) “entrusts local people to set funding priorities and allocate resources for innovative community development.”⁶⁷ Since government and NGO support of Palestinian communities is subject to a wide range of geopolitical forces, with ample opportunity for well-intentioned funding goals to fall short of benefiting the communities most in need, Rawa’s founders have created a participatory model to empower Palestinian people to identify and address their own needs directly. Using a three-part iterative process, community “clusters” in Israel, Gaza, and the West Bank first identify local initiatives in need of support (“Prospecting”). They then review and score submitted proposals (“Selecting and Voting”), and finally offer development and implementation support to the projects that are chosen (“Additional Support and Community Evaluation”).⁶⁸ Participants in the funding clusters evaluate their processes on an ongoing basis and continually iterate to improve the following year’s funding cycle. Rawa is concluding a three-year pilot and believes that “lasting solutions come from local people who are steeped in the knowledge, culture, and strengths of their communities, and are accountable to them.”⁶⁹

An interesting model is being developed in Jerusalem for Jewish and Palestinian artists. An organization called Jerusalem Culture Unlimited (JCU) convenes several giving circles that share values with PGM. They raise money from local, small-amount donors and solicit matching funds from foundations abroad, primarily in the United States. JCU Program Director Yaakov Malomet shared that while JCU’s primary activities are convening local artists

64 Ibid.

65 Ibid.

66 Interview, Talia Horev, Third Plateau, October 14, 2021

67 “About,” Rawa Fund, <http://rawafund.org/about>

68 “Our Model,” Rawa Fund, <http://rawafund.org/our-model>

69 Ibid.

for capacity- and relationship-building, part of the way it enhances Jerusalem's cultural scene is by empowering artists to make decisions about funding. The organization is currently in the early stages of launching a giving circle for Ethiopian Israeli artists, using matching funds from a family foundation. In this giving circle, a committee of Ethiopian Israeli activists, artists, and community leaders will evaluate and approve grant requests.⁷⁰ JCU facilitates a similar model for Palestinian artists in East Jerusalem, where a committee of Palestinian artists and community leaders evaluate and approve grants, with resources from a U.S.-based foundation that has ceded decision-making power to the committee.

In response to Covid-19, JCU implemented a relief grants program that pooled resources from local donors and matched funding from philanthropic partners such as the Leichtag Foundation, Nathan Cummings Foundation, and others, and distributed them to artists and cultural organizations whose programs were in need. The proximity of local donors and "the feeling that they were being supported by people who know them and know their work" was particularly meaningful as demonstrations of solidarity, civic participation, and mutual investment in their work.⁷¹

SUMMARY

Jewish philanthropy is fundamentally rooted in the needs of the Jewish community, which are simultaneously familiar and ever-evolving. As the Jewish community continues to change in its communal priorities, racial identities, and political ideologies, the Jewish philanthropic landscape is ripe with opportunity to bring a more diverse Jewish population to the decision-making table. Building relationships with and soliciting participation from members of less-represented groups can help close the gap between grantmakers and members of marginalized Jewish subpopulations to create more inclusive and wider-reaching philanthropic impact. Jonathan Hornstein, Program Director at The Harry and Jeanette Weinberg Foundation, sees the opportunity as an imperative for the Jewish philanthropic community: "This is a must. Too often, philanthropy has the perception of being in an ivory tower; failing to carefully consider the perspectives of those doing the work on the ground and, most importantly, those we aim to serve. Incorporating perspectives rooted in lived experience is essential. In my view, the philanthropic community is making significant strides toward authentic grounding for its work, as opposed to operating out of theory or assumption."⁷²

THE JEWISH
PHILANTHROPIC
LANDSCAPE IS RIFE
WITH OPPORTUNITY
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DIVERSE JEWISH
POPULATION TO THE
DECISION-MAKING
TABLE.

⁷⁰ Yaakov Malomet, email exchange, October 13, 2021

⁷¹ Ibid.

⁷² Interview, Jonathan Hornstein, Third Plateau, November 2, 2021

In "[Grantees and their Funders](#)," a 2020 JFN-commissioned report that explores grantseeker perceptions of their relationships with grantmakers in the Jewish community, Dr. Jack Wertheimer concludes with a series of recommendations for grantmaker and grantseeker partnerships, reviewed and informed by 14 veteran Jewish communal grantmakers and professionals, advising the Jewish philanthropic community to:

- Build Trust and Understanding;
- Increase Transparency;
- Improve Communications;
- Amplify Positive Norms;
- Establish New Norms; and
- Educate and Train Grantmakers and Grantseekers.⁷³

These goals map neatly with many of the impacts participatory grantmaking can have, described in the next chapter and throughout this report. These suggestions for improving how the Jewish community approaches philanthropy may in part be realized by empowering the members of the Jewish community with relevant lived experience to inform, advise, and/or decide how dollars might best benefit their efforts and organizations.

As you consider the contents of this chapter, we offer the following questions for continued reflection and learning:

- > **How accurate is this picture of the Jewish philanthropic community, and what perspectives might be missing?**
- > **Where could PGM be valuable or pose a challenge in the Jewish community? How might this inform how you think about and deliver your work?**
- > **What are your suggestions for how Jewish funders might engage in PGM?**
- > **What other Jewish texts, values, or practices would enhance our appreciation of PGM?**
- > **What are the opportunities and challenges associated with different Jewish philanthropic audiences (Federations, larger foundations, family foundations, community funds) using this guidebook?**

To share your answers and reactions please email JFN at pgm@jfunders.org.

73 Jack Wertheimer, "Grantees and Their Funders." Pg. 49

WHY PURSUE PARTICIPATORY GRANTMAKING?



"Who is the one that is wise? The one who learns from all people."
Pirkei Avot, 4:1 ("Ethics of the Fathers")

Judaism emphasizes the importance of wisdom in communal leadership. Following the Exodus from Egypt, when Moses institutes a tiered magistrate system to help manage the ever-increasing number of legal matters before him, he appoints leaders from each tribe who are not only wise but *known to their communities*.⁷⁴ This system recognizes that familiarity with the community is an essential component of being able to make decisions that are rooted in the community's needs.

"Who knows best" is at the heart of the question of whether to explore participatory approaches in philanthropy. Which individuals or groups are truly the best qualified to make meaningful philanthropic impact in a given community, organization, city, or ecosystem, and in what contexts? What is the most "effective" way to balance a grantmaker's resources and 30,000-foot view of systems with grounding in the experiences and considerations of those they are funding? PGM presents different opportunities to explore these questions. The following list, derived from Cynthia Gibson's work, offers several theories of change for how PGM advances different philanthropic aims, and flags their challenges and costs:

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OR ECOSYSTEM, AND IN
WHAT CONTEXTS?

PGM can help democratize philanthropy: Because participatory grantmaking broadens control of funding decisions to non-professional grantmakers, it opens up a process that has long been closed to the people closest to the ground and thus leads to more people engaged in philanthropy overall.

Challenge: Participation may skew toward "mob rule" if there are no filters or gatekeepers.

PGM can lead to better decisions/outcomes: Participation of non-professional grantmakers in funding decisions can lead to more informed and effective grantmaking.

Challenge: It can be difficult to navigate who is at the table, who decides who gets to be at the table, and how much weight participant voices should be given (i.e., giving input, consulting, deciding).

⁷⁴ Exodus 18:25 and Deuteronomy 1:13. See commentary by Ibn Ezra on Exodus 18:25.
<https://www.sefaria.org/Exodus.18.25?lang=bi&with=Ibn%20Ezra&lang2=en>

PGM promotes social justice/equity: Participation of traditionally marginalized groups in philanthropic activities can help increase participants' agency, leadership, and control over decisions affecting their lives.

Challenge: This may lead to an overemphasis on process rather than outcomes. The absence of broader perspectives, including experts, may constrain information-gathering needed for decisions.

PGM promotes community engagement: Participation of non-grantmakers in decisions on important issues strengthens communities overall because individuals and groups that are directly affected by those decisions are connected, informed, and engaged.

Challenge: To the extent that lots of people and interests are involved, conflicts of interest can arise and it may be difficult to determine accountability for decision-making and outcomes.⁷⁵

Grantmakers generally want to know if participatory grantmaking will lead to more effective philanthropy. As they have increasingly prioritized metrics and outcomes, grantmakers are committed to learning about new ways to "move the needle." There is a need for additional research to test the claim that involving community participants yields more effective grantmaking with more optimal outcomes. This research should consider not only measurable grant outcomes but also how the process itself impacts the people and organizations involved. Grantmakers focused on movement-building, increased transparency, and enhancing relationships with marginalized audiences may include these process outcomes in a more holistic understanding of "moving the needle." This focus introduces a range of additional questions grantmakers may consider as they explore the reasons to pursue or avoid PGM.

THERE IS A NEED FOR
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GRANTMAKING
WITH MORE OPTIMAL
OUTCOMES.

In a 2015 report for the Winston Churchill Fellowship, Lani Evans, Head of the Vodafone Aotearoa Foundation, addressed several key questions funders face when considering PGM: "Are we willing to let go of the power we hold? What would it look like and feel like to hand over power to the communities we are funding in a deep and supported way? And can communities handle it? Do we fundamentally believe that communities will do good if we give them the education, the tools and the opportunities? But perhaps a better question is, if we trust people, put good practice in place and let go of control and ego, how might we be able to deeply support change?"⁷⁶

This section will explore answers to these central questions by discussing the benefits and limitations of participatory methods.

⁷⁵ Cynthia Gibson, "Participatory Grantmaking: Has Its Time Come?" Ford Foundation, October 2017, <https://www.ncfp.org/wp-content/uploads/2020/08/Participatory-Grantmaking-Has-Its-Time-Come-Ford-Fdn-2017.pdf> Pg. 20.

⁷⁶ Lani Evans, "Participatory Philanthropy, An Overview," Winston Churchill Fellowship 2015 Report, <https://participatorygrantmaking.issuelab.org/resources/33090/33090.pdf> Pg. 7

BENEFITS OF PGM

As more foundations incorporate participatory grantmaking and increase their commitments to exploring its benefits, there is a growing body of evidence supporting its positive outcomes for grantmakers and grantseekers alike. These positive outcomes include increased accountability, grantmaker–grantseeker alignment, better-managed expectations, innovation, flexibility, transparency, cost-effectiveness, and solidarity.⁷⁷ Participatory grantmaking can narrow power imbalances and confer increased legitimacy on grant decisions.⁷⁸ Still, Evans notes that “many [funders engaged in participatory grantmaking] believe the benefits of this approach are self-evident,” and a need remains for greater data collection on the impacts of PGM on grantmaking and the nonprofits it supports, as well as data collection on the process of PGM itself.⁷⁹ That is why, in 2019, the Ford Foundation commissioned [nine research projects](#) about PGM.⁸⁰

Existing research indicates that participatory grantmaking can close the experiential gap between funders and grantseekers by increasing trust and improving relationships. In addition, PGM can expose funders to leaders and nonprofits with whom they were not previously engaged. At its best, PGM helps strengthen the ecosystem of grantseeking organizations by increasing both their agency and philanthropic know-how.

Process Outcomes and Grant Outcomes

PGM benefits fall into two categories. The first relates to *how* grants are awarded. Chris Cardona, Senior Program Officer at the Ford Foundation, calls these “process outcomes,” because they affect the relationships among the participant grantmakers with one another and with the funding institution, and can affect the way the funding institution does its work.⁸¹ Process outcomes refer to changes in the skills, capacity, and relationships of both the individuals involved in decision-making and the grantmaking professionals – what they learn to do and how they build relationships and trust with one another. Participant grantmakers may also generate ideas and innovations that can help the funding institution modify how it makes grant decisions, such as identifying funding priorities, drafting requests for proposals, inviting applications, and identifying how grant decisions will be made and communicated.

PROCESS OUTCOMES REFER TO CHANGES IN THE SKILLS, CAPACITY, AND RELATIONSHIPS OF BOTH THE INDIVIDUALS INVOLVED IN DECISION-MAKING AND THE GRANTMAKING PROFESSIONALS.

77 “Who Decides? How Participatory Grantmaking Benefits Donors, Communities, and Movements,” The Lafayette Practice, no date given, <http://www.thelafayettepractice.com/wp-content/uploads/2014/04/Lafayette-Report.pdf>. Pgs. 16–29

78 Rose Longhurst, “Five reasons to support participatory grantmaking,” Alliance Magazine (blog), August 7, 2017, <https://www.alliancemagazine.org/blog/five-reasons-support-participatory-grantmaking/>

79 Cynthia Gibson, “Participatory Grantmaking: Has Its Time Come?” Ford Foundation, October 2017, <https://www.ncfp.org/wp-content/uploads/2020/08/Participatory-Grantmaking-Has-Its-Time-Come-Ford-Fdn-2017.pdf>. Pg. 23

80 Christopher Cardona, “Participatory Grantmaking Matters Now More than Ever,” Ford Foundation, November 9, 2020, <https://www.fordfoundation.org/work/learning/learning-reflections/participatory-grantmaking-matters-now-more-than-ever/> The report “Sharing Power? The Landscape of Participatory Practices and Grantmaking Among Large US Foundations,” cited throughout this guidebook, is one such example

81 Interview, Chris Cardona, Third Plateau, October 14, 2021

Each of these components is influenced by the relationships and trust between the funding body and those seeking funds, and incorporating participatory practices can affect the individuals who engage in collective decision-making with the funder.

The second category of PGM benefits relates to *which* grants are awarded. Cardona calls these "grant outcomes," referring to whom or what the money actually goes to.⁸²

Process Outcome: Improved Trust - Improved Relationships

In today's cultural and political environment in which [trust in public institutions has deteriorated](#), there is "a growing chorus urging change within philanthropy."⁸³ The Center for Effective Philanthropy conducted a survey in 2018, soliciting perspectives from a nationally

representative sample of 244 nonprofit leaders about working with foundations. One of the most common findings was "a desire for funder-grantee relationships grounded in trust, honesty, and openness."⁸⁴ Foundation professionals and grantseekers alike recognize that philanthropy is just as much about the relationships between interested parties as it is about the impact an organization seeks to make.

MORE GRANTMAKERS
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Trust between grantmakers and grantseekers is the foundation for more open and honest communication channels, which can lead to more effective funding relationships, and thus better support for grant recipients. Readers may be familiar with the adage "Philanthropy moves at the speed of trust," which suggests trust is both the fuel for and obstacle to effective grantmaking. In a series of

white papers titled "[Move with the Speed of Trust](#)," aimed at helping organizational leaders achieve results during the unpredictability wrought by the Covid-19 pandemic, author Stephen M. R. Covey suggested that "the greatest currency leaders have is the trust people have in them" and that the greatest power they have lies in how they choose to extend trust to others."⁸⁵ It is reassuring, then, that "more grantmakers are looking to balance out power dynamics with nonprofit grantees and shift to more equitable funding practices."⁸⁶ The emergence of the [Trust-Based Philanthropy Project](#), an organization focused on reimagining the power dynamic between funders and nonprofits, speaks directly to this goal.⁸⁷

⁸² Ibid.

⁸³ John Esterle, "The Urgency of Trust-based Philanthropy," The Center for Effective Philanthropy, March 31, 2020, <https://cep.org/the-urgency-of-trust-based-philanthropy/>

⁸⁴ Naomi Orensten, "Grantee Voice: Relationships Matter," The Center for Effective Philanthropy, February 28, 2019, <https://cep.org/relationships-matter/>

⁸⁵ Stephen M. R. Covey, "Move with the Speed of Trust," Franklin Covey, no date given, <https://www.franklincoveysuriname.com/wp-content/uploads/2020/03/move-with-the-speed-of-trust1-1.pdf> Pg. 1

⁸⁶ "Anticipate & embrace what's next: 11 Trends in Philanthropy for 2021," Dorothy A. Johnson Center for Philanthropy, January 19, 2021, <https://johnsoncenter.org/wp-content/uploads/2021/01/11-Trends-for-2021-WEB.pdf> Pg. 9

⁸⁷ This peer-to-peer funder initiative tries to address "the inherent power imbalances between foundations and nonprofits...to help advance equity, shift power, and build mutually accountable relationships." <https://www.trustbasedphilanthropy.org/>

CASE STUDY: JAY AND ROSE PHILLIPS FAMILY FOUNDATION

Founded by children of Russian Jewish immigrants and rooted in Jewish values of charity, lovingkindness and social justice, in 2016 the Jay and Rose Phillips Family Foundation of Minnesota overhauled its funding priorities to enhance impact in North Minneapolis. In a 2017 blog post, Executive Director Patrick Troska described how the organization's leadership did not live in the northern part of town, and as an all-white staff and board, realized they did not understand the needs of the people they were trying to serve. They were not a part of this community and thus needed to build trust.

The foundation learned that trust is "a fragile commodity" that must be nurtured and re-earned constantly by showing up time and again, and "staying engaged even when the conversation gets difficult and your very presence is called into question." The foundation staff pursued greater transparency in their relationships and fostered a willingness to "enter and stay in uncomfortable and unfamiliar space."

Based on information provided in "[Change Happens at the Speed of Trust](#)" by Patrick Troska*.

* Patrick Troska, "Change Happens at the Speed of Trust," The Jay and Rose Phillips Family Foundation of Minnesota, February 7, 2017, <https://phillipsfamilymn.org/2017/02/07/change-happens-at-the-speed-of-trust/>

The Jewish philanthropic community is no exception to these trends. JFN's "[Grantees and their Funders](#)" inspired JFN and the Jewish nonprofit UpStart to jointly launch in 2021 a project called GrantED aimed at strengthening relationships between grantmakers and grantseekers in the Jewish community. In the report, Dr. Jack Wertheimer shares accounts from Jewish nonprofit leaders who, while referring in positive terms to their funders, also bemoaned the "multiple ways they feel forced to play games, to engage in a 'dance' with funders, and feel they in turn are treated with a lack of transparency by their funders."⁸⁸ These behaviors erode trust on both sides of the funding table. Conversely, Jewish nonprofit leaders say they appreciate when funders respect their expertise and value them as individuals.⁸⁹ This respect and valuing lies at the core of the participatory grantmaking ethos.

Whether in developing the grantmaking process, vetting grant proposals, selecting and working with grant recipients, or measuring grant impacts, participatory grantmaking empowers community stakeholders, organizational leaders, and people with lived experience to

⁸⁸ Jack Wertheimer, "Grantees and Their Funders." Pg. 45

⁸⁹ Ibid. Pg. 18

contribute to and at times control elements of funding decisions that affect their lives. Authentic participation can lead to "real, deep trust conversations,"⁹⁰ and "help grantmakers build trust and credibility among constituencies and communities with which they work."⁹¹ Empowering community voices also makes for a more transparent funding process, a key contributor to developing trust in organizational systems.

Amy Arbreton, Evaluation Officer at the William and Flora Hewlett Foundation, is currently working on an exploratory assessment of some of the foundation's participatory grantmaking efforts. In an interview with us, she emphasized that building trust is not only an outcome of participatory practices but an essential and intentional part of the process itself. PGM requires funders to invest in relationships with representatives from the grant recipients' communities, cede power to them to make decisions, maintain an openness to ongoing learning, and thus develop trust.⁹²

AUTHENTIC PARTICIPATION CAN "HELP GRANTMAKERS REBUILD TRUST AND CREDIBILITY AMONG CONSTITUENCIES AND COMMUNITIES WITH WHICH THEY WORK."

— Gillian Gaynair

Process Outcome: Closing the Experience Gap

The need for increased trust between grantmakers and grantseekers is rooted in the "experiential gap" between funders and the lived experiences of those in organizations they seek to fund. One Jewish communal funder who preferred to remain anonymous shared with us that "all philanthropy is trust-based; it just depends on whom you trust." She reflected that the philanthropic community doesn't grapple well with the question of "whom you trust," and that grantmakers would do well to spend time reflecting on why they might trust an individual or an organization: "How much of why I trust them is because they look like me or are similar to me or have similar experiences to me or have perspectives that I have?"⁹³

There are numerous differences between grantmakers and grantseekers that can contribute to the experiential gap, including race, gender, wealth and lived experience, and perhaps most of all, the underlying power dynamic inherent in any grantmaker-grantseeker relationship. In the Jewish community, the experiential gap can at times be smaller, but these differences can overlap and compound with components of Jewish identity such as affiliation, denomination, country of origin, Jewish cultural group, etc.

In "Grantees and Their Funders," Dr. Wertheimer detailed the boundary issues that can arise in the Jewish communal sector when funders are overly self-assured of their grantmaking

⁹⁰ Gillian Gaynair, "Participatory Grantmaking Aims to Dismantle Power Imbalances between Funders and the Communities They Serve," Urban Institute, May 12, 2021, <https://www.urban.org/urban-wire/participatory-grantmaking-aims-dismantle-power-imbalances-between-funders-and-communities-they-serve>

⁹¹ Cynthia Gibson, "Participatory Grantmaking: Has Its Time Come?" Ford Foundation, October 2017, <https://www.ncfp.org/wp-content/uploads/2020/08/Participatory-Grantmaking-Has-Its-Time-Come-Ford-Fdn-2017.pdf>. Pg. 22

⁹² Interview, Amy Arbreton, Third Plateau, September 10, 2021

⁹³ Interview, Funder (anonymous), Third Plateau, Fall 2021



PHOTO COURTESY OF TZEDEK SOCIAL JUSTICE FUND

expertise, noting how "the belief that they know better than professionals solely by virtue of being rich and successful in their careers" can lead to overconfidence and an "unwillingness to listen and learn."⁹⁴ This sentiment was echoed by Douglas Bitonti Stewart of the Max and Marjorie Fisher Foundation, who told us: "I don't see a correlation between having the ability to accumulate wealth and having the solutions to social and environmental challenges. We all need to listen to those closest to the issues."⁹⁵

The distance and misalignment between grantmakers and grantseekers can impede both the grantmaker and grant recipient in achieving their desired impacts. A professional working at a large Jewish family foundation who preferred to remain anonymous described to us how diversity, equity, and inclusion are core values of the foundation, noting, "In places where the diversity of the people you are trying to impact is not represented on your team, you have the possibility of making inequitable decisions and poor decisions. Your particular biases, ones you don't realize you have, can get in the way."⁹⁶

⁹⁴ Jack Wertheimer, "Grantees and Their Funders." Pg. 35

⁹⁵ Interview, Douglas Stewart, Third Plateau, September 27, 2021

⁹⁶ Interview, Funder (anonymous), Third Plateau, Fall 2021.

It is in part for this reason that the Jews of Color Initiative, which funds organizations led by and for Jews of Color (JoC) and multi-racial Jewish families, awards grants with an advisory council populated entirely by JoC. Though there are still differences in power, access, information, and relationships between the initiative's grantmaking team and those seeking funding, the initiative's Executive Director Ilana Kaufman (who also served as a reviewer of this guidebook) noted that the experiential gap is much narrower than elsewhere in the Jewish community because the JoC grantmakers have similar lived experiences to the grantseekers.⁹⁷ This proximity between the initiative and the JoC grantseekers helps foster collaboration, transparent communication, and ongoing learning for all who are involved, Kaufman reported.

"IN PLACES WHERE THE DIVERSITY OF THE PEOPLE YOU ARE TRYING TO IMPACT IS NOT REPRESENTED ON YOUR TEAM, YOU HAVE THE POSSIBILITY OF MAKING INEQUITABLE DECISIONS AND POOR DECISIONS."

—Grantmaking professional at a large Jewish foundation

Ceding power at different stages of the funding process to those with lived experience relevant to the community the grantmaker seeks to serve can narrow the experiential distance between all parties, honor the "nothing about us without us" imperative, and thus help ensure grantmaker assumptions and priorities are aligned with those whom they seek to support.

Process Outcome: Exposure to Organizations and Leaders

A symptom of the experiential gap between grantmakers and grantseekers is funders' limited exposure to the full range of leaders and organizations doing mission-aligned work. There is a well-known and well-documented phenomenon in philanthropy, broadly speaking and in the Jewish communal sector, that "funding attracts funding." Often the organizations that have already received grants are the ones most likely to attract and receive future grants, and foundations "tend to favor projects, bids, and proposals that reflect their identities – their demographics, outlooks and worldviews."⁹⁸ Foundations are attracted to applicants with a proven track record of receiving grants because having been approved for grants is viewed by many, whether explicitly or implicitly, as a sort of seal of approval, an indication that someone has vetted them for organizational health and promise.

The other side of this dynamic is that leaders perceived as different from funders, in race, class, community of origin, and beyond, are viewed as "riskier bets." Stanford University Professor Jennifer Eberhardt addressed this phenomenon in her book, "Biased," explaining that people are hard-wired to feel safer with leaders and methodologies with which they are familiar. This familiarity leads to perceived safety, and safety leads to trust, "a key driver of decision making for investments, power sharing, and support."⁹⁹

⁹⁷ Interview, Ilana Kaufman, Third Plateau, October 14, 2021

⁹⁸ Wrobel and Massey, "Letting Go," Pg. 28

⁹⁹ Angela Jackson, John Kania, Tulaine Montgomery, "Effective Change Requires Proximate Leaders, October 2, 2020, https://ssir.org/articles/entry/effective_change_requires_proximate_leaders

In the Jewish philanthropic world, foundation staff readily share the good work they see in the field with one another, which in turn opens up "the club" for further funding opportunities.¹⁰⁰ This practice can make it challenging for newer, lesser-known organizations to receive attention and funding from foundations, leaving those left out of the club feeling "frustrated and resentful."¹⁰¹

Addressing the importance of empowering community leaders outside the mainstream organizational structure, a Stanford Social Innovation Review article titled "[Effective Change Requires Proximate Leaders](#)" argued that "leaders who are proximate to the communities and issues they serve have the experience, relationships, data, and knowledge that are essential for developing solutions with measurable and sustainable impact."¹⁰² These individuals can identify and leverage community assets that those with different lived experience (i.e., grant-makers) may overlook.

Employing participatory methods can help funders connect with leaders and nonprofits not previously on their radars. It can help fund groups that would not typically receive funder attention, especially smaller organizations that lack staffing capacity to navigate the at times complex world of cultivating foundation relationships and submitting grant proposals.¹⁰³ By ceding power to those on the ground, working in and with communities, participatory grant-making "gives smaller organizations more of a shot by neutralizing the advantage of money and connection."¹⁰⁴

Process Outcome: Capacity-Building for Grantseekers and Social Movements

Just as grantmakers can learn from the PGM process, participatory grantmaking can bestow ecosystem-wide benefits and learning for grantseekers. When representatives of grant-seeking organizations are exposed firsthand to the grantmaking process, they develop familiarity with how grantmaking works and can better help their organizations secure future funding and navigate the grant proposal process in other contexts. The PGM process serves as a learning lab for both grantseekers and traditional funders. Funders are exposed to new ideas and organizations, and participants gain "access to the skills needed to raise money from funders," because the nonprofit leader "gets to put herself in the shoes of a funder for a period of time, learning how funders talk and how they make decisions."¹⁰⁵

THE PGM
PROCESS SERVES
AS A LEARNING
LAB FOR BOTH
GRANTSEEKERS
AND TRADITIONAL
FUNDERS.

¹⁰⁰ Jack Wertheimer, "Grantees and Their Funders." Pg. 10

¹⁰¹ Ibid

¹⁰² Jackson, Kania, Montgomery, "Effective Change"

¹⁰³ A recent report from The Foundation Review notes that "size is a consistent predictor of whether an organization receives a grant from foundation and government funders." Oktawia Wojcik, LesLeigh Ford, Keely Hanson, Claire Boyd, Shena Ashley "Participatory Grantmaking: A Test of Rubric Scoring Versus Popular Voting Selection in a Blinded Grantmaking Process," *The Foundation Review*, 12, no. 1 (2020), <https://doi.org/10.9707/1944-5660.1503>

¹⁰⁴ Wrobel and Massey, *Letting Go*. Pg. 69

¹⁰⁵ Ibid.

PGM can also create space for movement leaders to gather, reflect, and share. Funders with goals around increasing diversity, equity and inclusion (DEI); reducing power dynamics with their grant recipients; giving voice to marginalized communities, and investing in leadership development may be especially focused on this outcome, because it highlights how PGM can support movement building. Involving those who are most directly affected by the issue addressed "allows funders to be led by the movement they seek to support." PGM can be used for movement-wide agenda-setting by empowering those with lived experience to help shape philanthropy.¹⁰⁶

Grant Outcome: Accountability and Effectiveness

Nonprofit PGM funding recipients describe a heightened sense of accountability when they receive funding through PGM processes. Instead of being selected by and reporting to foundation professionals (who, as noted above, are not necessarily a part of the same racial, economic, religious, or other group), representatives of nonprofits that receive funds through PGM feel they have been chosen by their own community. Wrobel and Massey described how account-

ability is rooted in process: "What checks and balances are there on any given decision? Who defines what success looks like?...Whose opinion is consulted beyond the room where the decision is made?"¹⁰⁷ PGM helps distribute the answers to these questions across a broader range of engaged stakeholders than foundation professionals alone. Hannah Paterson, Churchill Fellow on Participatory Grantmaking described how some participatory grant recipients feel both a sense of accountability and backing from their community.¹⁰⁸

The MacArthur Foundation launched its Culture, Equity and the Arts program in 2019 and recruited a panel of Chicagoans representing a range of racial and ethnic groups, life experiences, and careers to review and rate applications.¹⁰⁹ Geoffrey Banks, a Senior Program Officer at the John D. and Catherine T. MacArthur Foundation who oversees these

grants (and a reviewer of this guidebook), shared that PGM can help empower grant recipients by providing them with opportunities for reflection that can ultimately help shift their own practices.¹¹⁰ He observed how the Foundation's PGM activities led to more exploration of diversity, equity and inclusion (DEI) practices internally at organizations vying for funding as that became a key component of grant assessment processes. He also noted that grant recipients were "thrilled to know that they had been selected by a panel of community representatives" and were inspired to make their communities proud by meeting their goals and having significant

PGM CAN BRING ABOUT BETTER GRANTMAKING BECAUSE COMMUNITIES THEMSELVES ARE MOST LIKELY TO MAKE DECISIONS THAT WORK FOR THEM.

¹⁰⁶ The Participatory Grantmaking Collective, "From silos to solidarity: Can grantmaking be part of movement-building?" Alliance Magazine (blog), June 5, 2020, <https://www.alliancemagazine.org/blog/from-silos-to-solidarity-can-grantmaking-be-part-of-movement-building/>

¹⁰⁷ Wrobel and Massey, *Letting Go*. Pg. 27

¹⁰⁸ Interview, Hannah Paterson, Third Plateau, October 4, 2021

¹⁰⁹ Geoffrey Banks, "A Work in Progress: Participatory Grantmaking in the Arts," MacArthur Foundation, March 10, 2020, <https://www.macfound.org/press/perspectives/work-progress-participatory-grantmaking-arts>

¹¹⁰ Geoffrey Banks is a reviewer of this guidebook

impact.¹¹¹ Ruby Reyes, Director of the Boston Education Justice Alliance, and a grant recipient from the Haymarket People's Fund, shared a similar sentiment. The PGM grant interviews are by a "funding panel made up of people of the community," who ask interview questions that feel less scripted or "checking the box" than typical foundation questions, and instead are rooted in a shared understanding of the community's needs.

Many foundation professionals also believe that engaging stakeholders directly in processes of governance and grantmaking leads to more effective grantmaking and promotes innovative solutions to the problems the foundation seeks to address.¹¹² Put succinctly, PGM can bring about better grantmaking because communities themselves are most likely to make decisions that work for them.¹¹³ This is in part why the MacArthur Foundation decided to employ [a participatory approach to allocating \\$82 million](#) designated for advancing racial and ethnic justice.¹¹⁴ As noted earlier, there is a need for additional research on the effectiveness of organizations and initiatives funded through participatory methods. See the [Defining Success and Measuring Impact of Participatory Grantmaking](#) section of this guidebook for an in-depth exploration of evaluating participatory processes.

SUMMARY: PGM BENEFITS

A growing number of foundations are realizing that listening to funding recipients and members of the communities affected by funding decisions and creating robust feedback loops can make it easier to identify needs, increase the effectiveness of their programs, and enhance trust and credibility. Empowering a wide range of stakeholders can yield better knowledge, relationships, and decision-making.¹¹⁵ Both process outcomes and grant outcomes help close the experiential gap between funders and grantseekers and help strengthen relationships between these audiences. In this way, the participatory grantmaking process is itself a key benefit.

Employing participatory methods at one or more stages of the grantmaking process can yield benefits for grant recipients, their communities, and the funder in a variety of ways. Incorporating PGM into the grantmaking process can be done in many ways; there is no one-size-fits-all approach to PGM, and there are numerous possible benefits of including participatory practices. How attractive or persuasive each of these benefits may be depends heavily on why a grantmaking body pursues its work, what impact it seeks to have, and who it thinks is best equipped to achieve that impact.

¹¹¹ Interview, Geoffrey Banks, Third Plateau, October 5, 2021

¹¹² Kelly Husted, Emily Finchum-Mason, David Suárez. "Sharing Power?" Pg. 5

¹¹³ Ceri Hutton, "Monitoring and Evaluating Participatory Grantmaking," Discussion paper for the Baring Foundation, January 2016, <https://baringfoundation.org.uk/wp-content/uploads/2016/06/Discussion-Paper-ME-for-Participatory-Grantmaking.pdf>. Pg. 4

¹¹⁴ Geoffrey Banks, John Palfrey, "Co-Creating our Equitable Recovery Grantmaking," May 18, 2021, <https://www.macfound.org/press/perspectives/co-creating-our-equitable-recovery-grantmaking>

¹¹⁵ Melissa A. Berman, Renee Karibi-Whyte, Olga Tarasov, "Social Compact in a Changing World: How philanthropies are grappling with growing scrutiny and critique," Rockefeller Philanthropy Advisors, 2019, <https://www.rockpa.org/wp-content/uploads/2019/09/Social-Compact-in-a-Changing-World.pdf>. Pgs. 21-23



PHOTO COURTESY OF TZEDEK SOCIAL JUSTICE FUND

DILEMMAS AND CHALLENGES OF PGM

Participatory grantmaking can add nuances and complexities that require additional time and resources. Like any kind of organizational change, exploring PGM entails certain mindsets, including openness to making mistakes, a commitment to ongoing learning, and a willingness to implement changes. These costs can be taxing for grantmakers, especially smaller shops that lack the staff capacity for additional responsibilities. Cynthia Gibson, author of numerous reports on PGM, noted in a 2020 paper commissioned by the Ford Foundation that PGM may not be right for all foundations all the time. Incorporating participation can be “complex, time consuming, expensive, and challenging.”¹¹⁶ If a PGM process results in funding organizations that the funders themselves would have supported anyway, those focused on grant outcomes may wonder if the time and resources were worth it.

¹¹⁶ Gibson, “Participatory Grantmaking: Has Its Time Come?” Pg. 21

For first-time and even repeat participant grantmakers, there are similarly steep learning curves and demands on time. Navigating organizational differences, politics, and group decision-making processes requires patience, time, and adept facilitation. Learning about the grantmaking cycle and the numerous considerations that go into designing, implementing, and assessing philanthropic activity takes time and skill.¹¹⁷

Demands on Time and Capacity

Participatory grantmaking is time-intensive and process-heavy for both professionals/traditional funders and the participants. For participants, PGM can entail time in meetings, learning about and/or helping to create the PGM process, navigating organizational relationships and dynamics, reviewing grant proposals, and preserving ongoing connections with those who get funded. This can put additional burden on already hardworking organizational leaders and activists. PGM is a time-consuming process that can take busy activists, organizers, and community leaders away from the day jobs where they are needed.

For members of low-income communities, this time also can cut into their hours available for paid work or family obligations. It is important for organizations led by people with privileged identities to balance efforts to include and empower less privileged identities with the toll it can have on the individuals themselves and the organizations that rely on their leadership.

For foundations and other grantmaking organizations, PGM can entail a combination of designing a grantmaking process, identifying community leaders, soliciting their participation, scheduling and facilitating meetings, and supporting the group's ongoing questions and learning. Many funders lack the internal capacity, such as time and personnel, to implement the steps required by PGM.¹¹⁸ Even larger, better resourced grantmakers can be deterred by the time-consuming nature of PGM processes. Christy Prah at Crown Family Philanthropies described how foundation staff had to work after hours because of the increased time PGM required, including the need to meet with participants in the evenings or other non-business hours.¹¹⁹

PGM IS A TIME-CONSUMING PROCESS THAT CAN TAKE BUSY ACTIVISTS, ORGANIZERS, AND COMMUNITY LEADERS AWAY FROM THE DAY JOBS WHERE THEY ARE NEEDED.

The PGM ethos is rooted in an ongoing commitment to organizational reflection and learning, which can be viewed both as its benefit and its cost. Reflection and learning can require extensive time and energy, especially in a setting where funders are experimenting with how best to incorporate participation. Prah noted the importance of deep, authentic engagement with stakeholders: "You can never meet with stakeholders just once – it has to be multiple times"

¹¹⁷ For additional examples of the limitations of PGM, see *Deciding Together*, Pgs. 24-31

¹¹⁸ Kelly Husted, Emily Finchum-Mason, David Suárez. "Sharing Power?" Pg. 28

¹¹⁹ Interview, Christy Prah, Third Plateau, September 2, 2021

for it to become a more familiar, more streamlined, and ultimately more effective practice.¹²⁰ Because of PGM's often time-intensive nature, some experts claim it is not ideal for rapid responses, when urgent action is required to move money for immediate aid. While launching a PGM process would certainly take valuable time during a crisis, organizations that have participation built into their DNA can have an established process for moving quickly. The [Disability Inclusion Fund](#), a five-year, \$12 million fund supporting U.S. groups run by and for people with disabilities, makes funding decisions by a committee in which at least half the members are individuals with disabilities.¹²¹ During the Covid-19 pandemic, the fund allocated \$225,000 in rapid response grants to organizations serving people with disabilities in need through participatory processes.¹²²

Complications of Convening Stakeholders

Convening organizational leaders, navigating the histories of their relationships, and facilitating a productive process is no small feat. It can be challenging to balance the need for diverse perspectives, whether in informing the granting process or sitting on a grantmaking committee,

and maintaining a manageable number of participants. For committees, there is value in having a small enough group that members feel "belonging, ownership, and responsibility," and yet it is important to ensure representation from a range of identities and perspectives.¹²³ Consider, for example, the challenges that may arise from uniting community leaders with political, cultural, and religious values that differ radically from one another and/or from the funder. How might a Jewish funder focused on social justice, Russian-speaking Jews, and supporting low-income *haredi* (ultra-Orthodox) Jews unite representatives from each of these communities in a productive process?

CHALLENGES MAY
ARISE FROM UNITING
COMMUNITY
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POLITICAL,
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AND/OR FROM THE
FUNDER.

For these reasons, PGM often requires deep and authentic investments in creating and sustaining relationships among funders and participants. Pushing a group toward shared purpose and agreement requires substantial focus and can be taxing: It can be challenging to leave politics at the door and achieve group consensus. This challenge

can be exacerbated when a facilitator "is not aware of power dynamics or what people are giving up to be in the room."¹²⁴ It is important to ensure participants leave feeling that they have been honored and valued, a task that can be easy or hard depending on the relationships between the convening funder and participants.

¹²⁰ Ibid

¹²¹ Wrobel and Massey, *Letting Go*. Pg. 38

¹²² "A Year of Radical Inclusion: The Disability Inclusion Fund Year 1 Summary," Borealis Philanthropy and the Disability Inclusion Fund, no date given, https://disabilityphilanthropy.org/wp-content/uploads/2021/05/DisabilityInclusionFund_Year1Summary.pdf

¹²³ "Reflecting a Movement's Principles in Grantmaking Structure: Evidence of the Benefits of Participation from the Disability Rights Fund and Disability Rights Advocacy Fund," BLE Solutions, November 2021, https://disabilityrightsfund.org/wp-content/uploads/ReflectingMovementsPrinciples_Nov2021_noQ.pdf

¹²⁴ Interview, Hannah Paterson, Third Plateau, October 4, 2021

Conflicts of Interest

If participant grantmakers are influencing allocations for their own organizations, it may be tempting to “trade horses” (“you fund my project and I fund yours”). Politics, rivalries, and complexities of longstanding relationships can intensify granting processes and lead to poor funding decisions.

Complexities of Empowering Participants

Participatory grantmaking seeks to change the power dynamics between those allocating and receiving funds, and so it is natural that those involved step into unfamiliar roles. Participating community members and organizational leaders are invited to engage in grantmaking, temporarily putting on program officer hats. While they bring expertise in the form of lived experience, programmatic and relational knowledge, and connections to “the work on the ground,” these participant grantmakers can lack experience making funding decisions and may need support to do so effectively. Geoffrey Banks at the MacArthur Foundation employs a model where participants on the grantmaking panel change with regularity and so “a key part of the process is training and positioning external actors to step into the role of program officers for a period of time.”¹²⁵

As they help participant grantmakers navigate the various demands of requesting and reviewing grant proposals and then deciding on grants, foundation professionals take on the role of facilitators and advisors. Though the foundation professionals are still responsible for governance, compliance, and legal matters, they become philanthropic educators who help situate and clarify the process. This learning curve can be taxing for participants and foundation professionals alike.

In addition, there is a delicate balance between empowering non-profit professionals and community leaders to participate in grantmaking and taking them away from the very networks they work to support. In a conversation on the JFN podcast “What Gives?,” President and Director of the Arthur M. Blank Foundation Fay Twersky,¹²⁶ who was involved with participatory grantmaking in her previous job at the Hewlett Foundation, noted how the more context, framing, responsibility, and information participatory panelists are given, the more they become like professional grantmakers and the less they are representing their communities. The question then is, “How much engagement can [a participant grantmaker] handle until they are over-engaged?”¹²⁷

**“HOW MUCH
ENGAGEMENT CAN
[A PARTICIPANT
GRANTMAKER]
HANDLE UNTIL
THEY ARE OVER-
ENGAGED?”**

—Fay Twersky

¹²⁵ Interview, Geoffrey Banks, Third Plateau, October 5, 2021

¹²⁶ Fay Twersky was previously Vice President of the William and Flora Hewlett Foundation

¹²⁷ Andrés Spokoiny (Host), December 15, 2021, “Fay Twersky: Philanthropy That Listens and Responds” (no. 26), [Audio podcast episode], In *What Gives?*, https://www.jfunders.org/podcast_twersky

Rather than developing in-house participatory practices, some funders decide to support community funds and community-led organizations that distribute capital to nonprofits in their networks. This practice helps limit the time demands for funders and grantseekers while avoiding replicating existing processes. It is also a straightforward way for funders to acknowledge that other organizations, built by and for specific communities, may be better equipped to deliver the change those communities seek. It is in part for this reason that a number of Jewish funders provide unrestricted grants to the Jews of Color Initiative, for the initiative to redistribute as it sees fit. The [Groundswell Fund](#), a major funder of women-of-color-led nonprofits in the U.S., supports this approach and has asked philanthropists to help move resources “into control of institutions where People of Color, who are primarily accountable to their communities, have the ultimate decision-making power over where dollars go.”¹²⁸

Summary: Dilemmas and Challenges of PGM

Incorporating participatory practices can be taxing and time-consuming for foundation professionals and the participants engaged in the process. PGM pushes those involved to explore new roles and responsibilities and navigate complex relationships and networks. A key underlying question for anyone exploring PGM is how to weigh the costs of PGM against the risks of simply continuing the status quo. Chris Cardona of the Ford Foundation addressed this decision by focusing on “when and where” funders want to spend the time: “If you believe [PGM] leads to better grant decisions because of relationships, the trust that is generated, the credibility of having folks closer to the ground involved in making those [granting] decisions, then the time you’ve spent up front is worth it.”

This contrasts with what he views as the time costs that can emerge after a grant process that did not incorporate participation, when decisions that are not grounded in a community’s understanding of itself and its needs may have to be explained or justified, and bruised relationships assuaged.¹²⁹ While using fewer people to make funding decisions may be more streamlined, if those decisions rely on ideas or assumptions that turn out to be disconnected from the people they aim to support, the grant may be less effective than desired.¹³⁰

¹²⁸ <https://groundswellfund.org/open-letter-philanthropy/>

¹²⁹ Interview, Chris Cardona, Third Plateau, October 14, 2021

¹³⁰ “Who Decides?” The Lafayette Practice. Pg. 25

A close-up photograph of several interlocking metal gears. The gears are made of a dark, possibly steel, material and show signs of wear and lubrication. A semi-transparent red rectangular overlay is positioned in the upper-middle section of the image, containing the title text in white. The background is dark and out of focus, emphasizing the mechanical components.

PARTICIPATORY GRANTMAKING MECHANICS

Interest in participatory grantmaking is on the rise, both in the United States and internationally, which has fueled a growing body of literature detailing the various models and approaches to the practice.¹³¹ Any funder interested in trying PGM will want to know where to begin, how and where to implement the participation, best practices, what pitfalls to avoid, and what models already exist. In this section, we answer these questions, relying heavily on earlier publications that provide practical, specific steps for grantmakers to bring more participation into their funding decisions.

WHERE TO BEGIN

Anchor In Your “Why”

There are myriad opportunities at various stages to incorporate community members or others who are not traditionally part of the grantmaking process, but to do this effectively and purposefully, grantmakers must first explore their own rationales for why they are interested in participatory grantmaking and what they hope to accomplish through it. As we noted at the beginning of this guidebook, incorporating participatory practices into the grantmaking cycle need not be a binary “yes or no” decision but rather a question of degree and focus. Being clear about your motivations for pursuing PGM will help you identify appropriate next steps and what participatory models to explore.¹³²

GRANTMAKERS MUST EXPLORE THEIR OWN RATIONALES FOR WHY THEY ARE INTERESTED IN PARTICIPATORY GRANTMAKING AND WHAT THEY HOPE TO ACCOMPLISH THROUGH IT.

Below are several questions to help you reflect on why PGM might be a valuable tool to further your philanthropic impact. These can be used for individual reflection in advance of institutional discussions about PGM, or in a group setting, to facilitate conversation:

- > **When you envision success, which people, organizations, causes, and communities benefit and in what ways?**
- > **In what ways, if any, can PGM help advance funding goals around meaningful change and impact?**
- > **To what extent can PGM improve the efficacy of your grantmaking?**
- > **What are your specific motivations for exploring participatory grantmaking?**
 - o What are your foundation leaders' motivations for exploring participatory grantmaking, and to what extent, if any, might they be similar to or different from your own?

¹³¹ Bill Pitkin, “Moving the Rooms of Power: Participatory is Gaining More Traction” Inside Philanthropy, June 24, 2020, <https://www.insidephilanthropy.com/home/2020/6/24/moving-the-rooms-of-power-participatory-philanthropy-is-gaining-more-traction>

¹³² Interview, Hannah Paterson, Third Plateau, October 4, 2021

- In what circumstances, if any, might it make sense for your foundation to incorporate greater participant input or decision-making power in your grantmaking?
- Who are the participants your organization might choose to engage in grantmaking?
 - What specific perspectives, lived experiences, and/or identities do these participants bring to the table that ought to be included in grantmaking decisions?
 - Whose voices are not involved in your organization's funding decisions? Which identities do not currently have a seat at the table?
- When you think about the communities, values, and cultural contexts of those currently making funding decisions and those receiving funds, how large or small is the experiential gap between them?
- What concerns or fears do you have about participatory grantmaking?
- What do you think your role as a funder should be in supporting or empowering grantseeking organizations and others in the community?

Whether you respond to one or all of these questions, in your own private reflection exercise or as part of a group conversation, having clear answers will help ensure your compass remains "pointing north." And, naturally, as you engage in the process and inevitably learn from the experience, your answers to these questions may change, which in turn will affect how you approach PGM in future iterations.

This change is to be encouraged: As grantmakers improve at reflecting upon their own priorities, funding processes, and experiential gaps, they improve at supporting and impacting the communities they care most about.

Assess Possible Benefits and Costs

As with any important decision, considering what is to be gained and what may be lost as a result is a helpful initial step. In addition to reviewing the [PGM benefits](#) and [challenges](#) earlier in this guidebook, funders may consider the following questions to help formalize their calculations.

INCORPORATING PARTICIPATORY PRACTICES INTO THE GRANTMAKING CYCLE NEED NOT BE A BINARY "YES OR NO" DECISION BUT RATHER A QUESTION OF DEGREE AND FOCUS.

Benefits

- What might our foundation gain from exploring PGM?
- Specifically, to what extent might this process:
 - Increase trust with different communities, organizations, and/or individuals?
 - Expose us to leaders and/or organizations not currently on our radar?
 - Be a valuable learning opportunity for our staff and for the participants we engage?
 - Strengthen the relationships between organizations and/or individuals participating?
 - Advance our foundation's mission / desired impact in the field?
 - Enhance how we are perceived or respected by peer organizations and/or our grant recipients?
 - Help us live out our diversity, equity, and inclusion (DEI) values?
 - Lead to better grant decisions?
 - Lead to better grant outcomes?
 - How can our experience exploring PGM help move the (Jewish) philanthropic field forward?

Costs

- What will it cost our organization to explore PGM?
- Specifically, to what extent might PGM:
 - Damage our relationships with different communities, organizations, and/or individuals?
 - Create confusion, conflict, and/or tension among the organizations and/or individuals participating?
 - Require our staff members to develop new skills?
 - Tax our staff beyond their current capacity?
 - Demand a lot of time?
 - Result in decisions that are misaligned with the interests of our current board or that don't reflect our grantmaking priorities and/or requirements?
 - Lead to the same or worse grant decisions compared to how we normally make funding decisions?
 - Lead to the same or worse grant outcomes compared to how we normally make funding decisions?

An August 2021 Stanford Social Innovation Review article titled "[Understanding the Risks of Nonparticipation in Philanthropy](#)" offers a comprehensive framework for grantmakers to assess their own funding decisions to see how and in what ways they do (or don't) incorporate community involvement. As this article notes, the process of PGM does not solve all the problems inherent in the relationships between funders and the communities they aim to impact, and "even meaningful participatory philanthropic programs can make mistakes."¹³³ However,

133 Daniel Parks, "Understanding the Risks of Nonparticipation in Philanthropy," Stanford Social Innovation Review, August 25, 2021, https://ssir.org/articles/entry/understanding_the_risks_of_nonparticipation_in_philanthropy

the article asserts, grantmakers should remain reflective and open to learning from all PGM outcomes, constructive and critical, in furtherance of arriving at more effective and more inclusive funding practices.

Find Peers and Support Systems

There is no need to explore PGM alone! Grantmakers experimenting with PGM can benefit from one another's experiences and learning, and share best practices. One important resource is the Participatory Grantmakers Community, a growing [PGM community of practice](#) made up of grantmakers, nonprofit leaders, and researchers from around the world who share resources, advice, and feedback and support one another's PGM endeavors. Founded in 2020 by a small group of practitioners, the community had, by the end of 2021, hosted 28 virtual events for 3,000 attendees, and enlisted over 800 members.¹³⁴ The group boasts an

active and highly supportive Slack channel where one can peruse and contribute to ongoing conversations about participatory philanthropy and engage directly with a wide range of professionals from foundations and funds of different sizes, as well as with authors and activists. In October of 2021, the community of practice launched a "buddying scheme" for those interested in peer learning and in forging more formal connections with others in the wider PGM community. It is thanks in no small part to this Slack channel and community of practice that our team was able to identify many of the reports and resources cited in this guidebook. The daily dialogue on these platforms — replete with sharing of best practices, exchanging of reports, and exploring of new models — highlights the increasingly resonant appeal of participatory methods.

ONE IMPORTANT RESOURCE IS THE PARTICIPATORY GRANTMAKERS COMMUNITY, A GROWING PGM COMMUNITY OF PRACTICE MADE UP OF GRANTMAKERS, NONPROFIT LEADERS, AND RESEARCHERS FROM AROUND THE WORLD.

Choose Audiences to Involve and Decide When to Involve Them

Deciding who should be included in the PGM process and formalizing *how* to decide who should be included are essential pieces of creating an intentional and effective committee, and relies in part on which

[PGM models](#) will be most effective in achieving your PGM goals. One approach is for foundations to identify the community and/or organizational leaders they think will be good fits for decision-making. While this approach can be effective, it also runs the risk of significant selection bias: It's human nature to choose decision-makers who look like, think like, and operate like ourselves. Even if foundation leaders and staff are adept at seeking out opinions different from their own, they are limited by their own relationships and networks.

Another approach is for grantmakers to solicit input from and/or empower trusted partners and leaders in the field to select participant decision-makers. This itself can be an initial act of trust-building and power-ceding. Consider inviting four to eight nonprofit or community

¹³⁴ Data shared by PGM Community of Practice leadership via email on December 7 and 21, 2021



PHOTO COURTESY OF TZEDEK SOCIAL JUSTICE FUND

leaders to nominate one to three candidates each for the grantmaking committee. This approach is a model for how grantmakers can nurture their relationships with these community leaders while inviting new voices to the decision-making table.

A third approach is to issue an open call for community involvement. While some grantmakers may be more comfortable inviting the leaders of organizations in a given sub-sector, others may welcome any interested community member to review applications and cast votes.

Regardless of the specific model for "deciding who decides," what matters most is that the process for choosing individuals to involve in participatory grantmaking is rooted in the foundation's goals for what it wants to accomplish. With these goals in mind, and by asking "whose voice is not represented" in this process, foundations can ensure their PGM is structured in a manner that is both inclusive and effective.

There are multiple touchpoints throughout the grantmaking cycle when PGM can play a role; PGM need not be an all or nothing decision. Whether in creating the PGM process itself, determining grant recipient eligibility, drafting the request for proposals, reviewing grant proposals, voting on allocations, or identifying evaluation criteria, the typical funding cycle provides a range of opportunities to include participation.¹³⁵ For additional questions to help guide conversations about PGM structure, see [Deciding Together](#), page 39.

PGM MODELS

As grantmaking organizations have explored various approaches to empowering participant decision-makers, several different models have emerged. The descriptions below draw directly from Kelley Buhles' "[Primer for Participatory Grantmaking](#),"¹³⁶ her [video describing these models](#),¹³⁷ and Lani Evans' "[Participatory Philanthropy](#),"¹³⁸ all of which should be consulted for a more robust explanation of these models and examples of organizations that employ them.

Representative Committee: This model includes sector experts, organizational leaders, organizers, and/or activists with relevant lived experience. It can range from including as few as two to three individuals to inviting a large group. It should be noted that asking one person to speak on behalf of or otherwise represent an entire group, especially one that has a marginalized identity, can lead to harmful tokenism. It is necessary to be thoughtful and intentional about the identities and groups represented at the decision-making table and what peers or allies they have in the room.

Lani Evans, Head of the Vodafone Aotearoa Foundation, described an intriguing inverse scenario, where a grantmaking committee made up almost entirely of participants included just one rotating seat for a donor. Every six months a new donor would replace the previous donor in this seat, bringing a new perspective to the group while also learning from the panel.¹³⁹

Convening a group or board of people from the community can alleviate issues of tokenism and create an environment ripe for multivocal learning.

Mixed Model: In this approach, the foundation board reserves a fixed number of the voting seats for its members and fills the remaining open seats through a different process, like a democratic public election. It is important to note that this kind of election can entail chal-

¹³⁵ Ben Wrobel and Meg Massey, *Letting Go: How Philanthropists and Impact Investors Can Do the Most Good by Giving Up*, Published independently, 2021, Pgs. 31-32. Includes an overview of how PGM can be included throughout the funding cycle

¹³⁶ Kelley Buhles, "A Primer for Participatory Grantmaking," Nonprofit Quarterly, November 2, 2021, <https://nonprofitquarterly.org/a-primer-for-participatory-grantmaking/>

¹³⁷ Kelly Buhles, Rose Longhurst, Violeta Rubiana, "Models of Participatory Grantmaking," Participatory Grantmaking Community, June 3 and 4, 2021, <https://www.youtube.com/watch?v=FXiofZ7JzP4&t=486s>

¹³⁸ Lani Evans, "Participatory Philanthropy, An Overview," Winston Churchill Fellowship 2015 Report, <https://participatorygrantmaking.issueelab.org/resources/33090/33090.pdf>. Pg. 8.

¹³⁹ Ibid.



PHOTO COURTESY OF TZEDEK SOCIAL JUSTICE FUND

lenges, such as when only the most motivated or “in the know” community members vote, or when the vote is merely a popularity contest. The mixed model helps ensure that a healthy balance of skills and perspectives are represented in the decision-making about funding. Allowing the board to control a portion of the seats provides a safety net for stakeholders who want to guarantee certain organizational skills and perspectives are represented or who are concerned about ceding too much authority. At the same time, it still empowers community voices be part of the decision-making.

Community Committee: In this model, all decision-makers are from the community or communities benefiting from the funding process. This can include both nonprofit professionals, lay leaders, and individuals.

Rolling Applicant Committee: Professionals at grant-receiving organizations become the grant decision-makers for the subsequent round of funding. They thus get to wear multiple hats and experience both applying for and allocating funds through participatory practices. This model is intended to help build opportunities for collaboration across organizations. Chal-

Challenges can arise with conflicts of interest and tensions between peer organizations awarding funds to each other. The grant recipients-turned-grantmakers must be properly coached and managed to ensure they follow funding criteria and avoid conflicts of interest.

Closed Collectives: Focused on a specific community or geography, this model is “closed” because only those seeking funds are a part of the decision-making process. Relevant stakeholders and grant-seeking organizations convene, and after discussing trends and key considerations, vote on how to allocate funds to one another. Though this puts a time burden on the applicants, it can also help expose organizations and leaders to new ideas and it allows them to learn more about the landscape of their own issue-areas.

Open Collectives: Also focused on a specific community or geography, this model involves both applicants and all interested community members to make funding decisions.

In “Participatory Grantmaking: Has its Time Come?” Cynthia Gibson offers the following list of ways that foundations have explored integrating PGM:

- Inviting input and active participation from non-grantmakers about program strategies, priorities, and/or grantmaking on a regular basis.
- Adding new functions or departments that strengthen foundations' capacity to engage non-grantmakers more effectively, e.g. communications, public outreach, research, etc.
- Instituting hiring policies that ask about and value potential employees' commitment to non-grantmaker participation in the funding process.
- Stipulating that advisory or board committees include non-grantmakers.
- Engaging the board in discussions about the benefits and drawbacks of non-grantmaker participation and making decisions about which approaches are most appropriate for the foundation and why.
- Integrating a public participation component in all of the institutions' activities.
- Redesigning the role of program staff to serve as partners with non-grantmakers in various parts of the grantmaking process.
- Designating a specific number of board or committee seats for non-grantmakers.
- Initiating field-wide discussions that explore how/whether non-grantmakers' participation in grantmaking processes can lead to more effective decisions about resource allocation and/or grantee outcomes.

- Being explicit about transparency as an institutional value and practice by: consistently making information and data about funded projects publicly available; providing open access to grant-funded solutions that grantees are producing; making evaluation results available to the public (including negative results); and posting updates on grant programs and asking for public comment.
- Making adherence to the above practices part of staff members' performance reviews and compensation/ promotion decisions¹⁴⁰

SETTING UP FOR SUCCESS

While some grantmakers, like the MacArthur and Ford foundations, use participatory grant-making for a portion of their larger portfolio, other foundations are wholly built on and dedicated to this practice. In their book "Letting Go," Ben Wrobel and Deb Massey estimate that there are 40 such funds around the world, and they categorize them into "movement builders" and "community builders."¹⁴¹ Movement builders "seek to reorient philanthropy away from a mindset of 'fixing' marginalized communities, and toward supporting their grassroots organizing and advocacy work."¹⁴² They use PGM as the vehicle to move resources and power from philanthropy to movement leaders and their efforts. Community builders, in contrast, focus on a specific group of people, often in a city or other geographic area, and seek to "develop a comprehensive, long-term set of strategies to address the social, health, and economic needs of marginalized people in their corner of the world – and to make sure that the most marginalized voices are at the table when that strategy is developed."¹⁴³

The Jewish philanthropic world can consider both of these approaches in its efforts to create more vibrant, just, and thriving communities. Jewish organizations focused on social justice and human services may be the most obvious candidates for incorporating PGM since they generally engage communities with significantly different lived experience from those in the funding world. Similarly, Jewish foundations with non-Jewish portfolios are likely to have more interaction with diverse audiences than those

"IN REGARD TO ANY DIRECT SERVICES, SUCH AS ANTI-POVERTY PROGRAMS OR DOMESTIC VIOLENCE PREVENTION AND TREATMENT PROGRAMS, THE PHILANTHROPIC COMMUNITY MUST ENGAGE WITH PEOPLE WITH LIVED EXPERIENCE TO INFORM GRANTMAKING AND PROGRAM DESIGN."

Jonathan Hornstein
Program Director at
The Harry and Jeanette
Weinberg Foundation

¹⁴⁰ Cynthia Gibson, "Participatory Grantmaking: Has Its Time Come?" Ford Foundation, October 2017, <https://www.ncfp.org/wp-content/uploads/2020/08/Participatory-Grantmaking-Has-Its-Time-Come-Ford-Fdn-2017.pdf> Pg. 13.

¹⁴¹ *Letting Go*. Pg. 79.

¹⁴² *Ibid.*

¹⁴³ *Ibid.*

that focus mostly or exclusively on the Jewish community. Since these grantmakers regularly engage with a broader range of grant recipients and program participants, they may be more likely to have training and philosophies that make them natural fits for exploring how PGM can help them better support these populations.¹⁴⁴

At the other end of the spectrum, we recognize that family foundations, especially those in which the family member(s) who earned the wealth and established the foundations are still living, may be more resistant to the concept of sharing decision-making power. These grantmakers have greater proximity to the source of the wealth and thus may be reluctant to involve

others in deciding how it is allocated. In addition, funders focused on disruptive innovation “from the outside” may find the challenges of getting to consensus with multiple stakeholders are not conducive to the kind of innovation they seek.

AS A GRANTMAKER, HOW DO YOU KNOW IF YOUR ORGANIZATION IS WELL-SITUATED TO EXPERIMENT WITH PARTICIPATORY METHODS?

As a grantmaker, how do you know if your organization is well-situated to experiment with participatory methods? What questions would you need to answer to help diagnose your current practices and “PGM readiness?” Grantmakers asking these questions who may be interested in creating a diagnostic tool to let grantmaking professionals reflect on their institution’s existing practices and norms, should [email pgm@jfunders.org](mailto:pgm@jfunders.org). Of note, a more robust and community-informed participatory audit tool is currently being created by a group com-

posed of PGM practitioners and community leaders: Katy Love, an independent consultant and former Director of Grantmaking / Community Resources at the [Wikimedia Foundation](#); and Diana Samarasan, the founding Executive Director and current Senior Advisor to the [Disability Rights Fund](#). The first phase of their tool aims to help funders explore the concept of participation in their organizations and supports them in considering how they might increase it in their practices. Grantmakers interested in learning more about this tool can contact [Love](#) (katylovework@gmail.com) and [Samarasan](#) (diana.now@gmail.com) directly.

In addition, the following suggestions can help steer participatory efforts toward success.

Stay Open to Listening, Learning, and Evolving

PGM exploration can begin with an interested program officer, since stakeholder engagement efforts tend to be implemented at the suggestion of motivated staff or senior leadership¹⁴⁵ When program officers push themselves to solicit a diversity of perspectives and remain open to learning from them, they allow new ideas to take root: “There must be an ongoing commitment to asking who is NOT at the table, and a willingness to identify and reach out to

¹⁴⁴ Interview, Ilana Kaufman, Third Plateau, October 14, 2021

¹⁴⁵ Kelly Husted, Emily Finchum-Mason, David Suárez. “Sharing Power? The Landscape of Participatory Practices & Grantmaking Among Large U.S. Foundations” The Evans School of Public Policy and Governance, University of Washington, June 2021, <https://evans.uw.edu/wp-content/uploads/2021/07/Participatory-Practices-and-Grantmaking-Report-June-2021.pdf>. Pg. 27.

people who are missing. Like most of the work in participatory grantmaking, this is an iterative process, recognizing the need for ongoing learning and change."¹⁴⁶

Being open to new voices and perspectives also means listening to those outside of the participatory grantmaking committee. It is important to continually bring new voices into the process by varying the community members participating in PGM over time, either by instituting term limits or a rotation model. This helps ensure that those making the funding decisions continue to be of and speak for the community they represent.¹⁴⁷

Invest in Skilled Facilitation

Facilitating PGM processes requires a number of skills: navigating group dynamics, honoring multiple viewpoints, steering discussion toward desired outcomes, holding space for processing, and adapting to challenges and roadblocks in real time. It's important to ensure that a skilled facilitator informs or leads PGM processes. This facilitator may be part of the foundation staff, one of the participant grantmakers themselves, or a third party with PGM experience. Grantmakers and nonprofit professionals who engage with or lead different participatory processes may be open to helping you and your PGM efforts be successful. Consider connecting with the PGM community of practice or reaching out directly to an organization on the [list of grantmakers using PGM](#).

MAKING SPACE TO DISCUSS YOUR FUNDING ORGANIZATION'S MOTIVATIONS AND DESIRED OUTCOMES OPENLY, AND INVITING FEEDBACK ON THEM FROM THE GROUP OF PARTICIPANTS, CAN HELP BUILD MORE AUTHENTIC RELATIONSHIPS AND TRUST AT THE OUTSET.

Create Shared Understanding of Purpose

Being transparent with all participants about why your foundation is pursuing PGM and what you hope the process will generate can help those involved better understand what is expected of them and what they should expect from the process. Similarly, making space to discuss your funding organization's motivations and desired outcomes openly, and inviting feedback on them from the group of participants, can help build more authentic relationships and trust at the outset. Establishing clearly defined roles and decision-making processes will help the group have a clear path forward.

Compensate Participants for their Time

Paying participant grantmakers for the time and energy they have invested in the PGM process is a way to show thanks for their time and energy. In addition, providing compensation is a way to be inclusive of those who have less financial stability or who can't afford to take unpaid time off of work.¹⁴⁸

¹⁴⁶ Dr. Stellan Wairimu Bosire, Rose Longhurst, Katy Love and Diana Samarasan, "Participatory grantmaking: can we afford not to do it?" Alliance Magazine, December 10, 2019, <https://www.alliancemagazine.org/analysis/participatory-grantmaking-can-we-afford-not-to-do-it/>

¹⁴⁷ Ibid.

¹⁴⁸ Ibid.

WHAT ABOUT GIVING CIRCLES?

Giving circles convene individuals with shared values and philanthropic interests to pool their resources and decide on one or more recipients, and thus provide a more democratized form of philanthropy than institutionalized models. Because the values inherent in the giving circle model — such as collaboration, appreciation for diverse perspectives, empowerment of all levels of givers — overlap with the values inherent to participatory grantmaking, giving circles offer a similarly attractive approach to rooting philanthropy in the needs of the community. When members of giving circles research and discuss recipients, they often become more directly involved in causes that matter to them and can bring about change “not only through their donations but through their volunteerism and voice.”¹⁴⁹ Similar to PGM, members of giving circles can identify and fund organizations that might not be known to or receive support from foundations.

In 2014, the Natan Fund launched [Amplifier](#) with the mission of “supporting giving circles inspired by Jewish values.” With 120 giving circles to date, Amplifier (which in October 2020 became part of the Jewish Federations of North America) has learned that being a part of a giving circle imbues donors with more meaning and purpose in their giving and that they “understand how they can most influence and create change they want.”¹⁵⁰ As with PGM, involving a wider range of voices in funding decisions can enhance the philanthropic process for both givers and receivers, because, as the Amplifier website put it, “our communities and our nonprofit sector are stronger when more people give and more voices are heard.”¹⁵¹

“OUR COMMUNITIES
AND OUR
NONPROFIT SECTOR
ARE STRONGER
WHEN MORE PEOPLE
GIVE AND MORE
VOICES ARE HEARD.”

— Amplifier

Just as PGM provides opportunities for grantmakers to solicit and empower nonprofessional grantmaking voices, giving circles can provide an opportunity to shift power dynamics between givers and receivers, change mindsets about who is considered a philanthropist, support underfunded groups, and raise the visibility of these groups. These are four goals of [Philanthropy Together](#), an organization founded in April 2020 in collaboration with Amplifier and several other giving circle network organizations, to “connect and catalyze the field of giving circles to democratize and diversify philanthropy.”¹⁵² By of-

fering training programs for people who want to start their own giving circles and numerous resources for all steps of the process, Philanthropy Together aims to work with 3,000 active giving circles, including involving 350,000 individuals, by 2025.

¹⁴⁹ Michael Layton, “Giving Circles: A Way Forward For Democratizing Philanthropy,” Dorothy A. Johnson Center for Philanthropy, April 20, 2021, https://johnsoncenter.org/blog/giving-circles-a-way-forward-for-democratizing-philanthropy/?utm_source=Johnson+Center+e-Newsletters&utm_campaign=c696a54bbe-Field-Notes-April2021&utm_medium=email&utm_term=0_e86623ff86-c696a54bbe-398955317&mc_cid=c696a54bbe&mc_eid=f96e6dcb5f

¹⁵⁰ <https://www.amplifiergiving.org/about-us/basic-page/>

¹⁵¹ Ibid.

¹⁵² “Celebrating One Year: April 2020 – March 2021,” Philanthropy Together, <https://impact.philanthropytogether.org/>

CASE STUDY: GIVING AS PARTNERS

Jewish Family and Children's Service (JFCS) of Greater Philadelphia has recently employed a giving circle model that incorporates a degree of community participation to ensure the funds it distributes are targeting the recipients' needs. In 2021, JFCS donors David and Marjorie Rosenberg established a giving circle called Giving As Partners (GAP) to "respond to the needs of non-Jewish individuals and families across the Greater Philadelphia region."

The GAP donors consult with potential fund recipients to ensure they have a voice in the process

and that giving is responsive to their needs. David Rosenberg acknowledged that "what is right for me and what feels like a good structure for me, is not necessarily what is good for the Black and brown community." They learned that JFCS's non-Jewish clients were looking for partnership rather than top-down charity and built this into how GAP approaches giving.

Based on information provided in ["A Local Jewish Philanthropy Steps Up its Efforts to Look Beyond the Jewish Community" by Simone Ellin.*](#)

* Simone Ellin, "A Local Jewish Philanthropy Steps Up its Efforts to Look Beyond the Jewish Community," *Inside Philanthropy*, March 18, 2021. <https://www.insidephilanthropy.com/home/2021/3/18/a-local-jewish-philanthropy-steps-up-its-efforts-to-look-beyond-jewish-causes>

Though giving circles offer a compelling path to increase the number of people involved in philanthropy and diversify the causes that get funded, they do not necessarily solicit the involvement of the communities receiving funds. While giving circle participants may of their own accord reach out to potential recipients to incorporate their voices in the process, the model is different from PGM because it is rooted in empowering the donors participating in the giving circle to decide where the funds are directed, rather than the community or organizational leaders who are benefiting from the resources. Nonetheless, giving circles can include participatory grantmaking, should those involved choose to do so.

A photograph of a group of young people in a workshop or meeting. In the foreground, a person wearing a red baseball cap and a red and blue plaid shirt is partially visible. Behind them, a young man with reddish hair, wearing a pink patterned shirt, is looking towards the camera with his hand near his face. To his right, a young woman with long dark hair, wearing a white t-shirt and large headphones, is smiling. The background is slightly blurred, showing a whiteboard with some faint writing. A semi-transparent red rectangular box is overlaid on the image, containing the title text in white.

DEFINING SUCCESS AND MEASURING IMPACT OF PARTICIPATORY GRANTMAKING

This guidebook has explored the benefits and challenges of participatory grantmaking as evidenced by a body of PGM literature, research, and firsthand accounts. And yet, questions remain about how to define PGM success, which key metrics are most relevant to track, and how to define and measure impact. In light of how PGM seeks to shift power from grantmakers to community leaders, it is unclear to what extent traditional measurement and evaluation are appropriate for participatory practices or if PGM evaluations merit a different kind of approach. There is a need for additional research that tests the assumption that involving community participants yields more effective grantmaking with more optimal outcomes.¹⁵³

In this section we explore what forms of measurement and evaluation might be appropriate for PGM, emphasizing the importance of measuring the funding process itself. To help funders, evaluators, and PGM participants craft intentional and effective evaluations, we have drafted a series of evaluation questions both for reflection in advance of evaluation design, and for the actual implementation of the evaluation, which can be found in [Appendix B](#).

Background

In a 2009 collection of perspectives about philanthropic evaluation, Grantmakers for Effective Organizations ([GEO](#)), and the [Council on Foundations](#) explored the relationship between learning and evaluation. This 2009 publication recognized multiple avenues for learning as a continuous process and defined evaluation in philanthropy as "systematic information gathering and research about grantmaker-supported activities that informs learning and drives improvement."¹⁵⁴ Relying on this definition, the question, then, is how might information-gathering and research about participatory grantmaking inform learning and drive improvement — and *for whom*? Just as PGM provides opportunities for participant grantmakers to own a piece of the process, so too can PGM evaluation provide opportunities for them to be not only objects of study but key audiences and architects of the process.

In response to widespread reckonings with racial justice and the Covid-19 pandemic, many grantmakers have offered larger numbers of unrestricted grants, loosened their reporting guidelines, and revisited their learning and evaluation practices. According to the [Center for Evaluation Innovation](#), recent shifts in grantmaking evaluation include questioning traditional, top-down approaches, and incorporating data-collection efforts that are rooted in relationships and conversations with grant recipients (as opposed to external evaluation data). Strong relationships

HOW MIGHT
INFORMATION-
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AND FOR WHOM?

¹⁵³ Cynthia Gibson, "Participatory Grantmaking: Has the Time Come?," The Ford Foundation, October 2017, https://www.fordfoundation.org/media/3599/participatory_grantmaking-lmv7.pdf (p. 22)

¹⁵⁴ William H. Woodwell Jr., "Evaluation in Philanthropy Perspectives from The Field," Grantmakers for Effective Organizations and the Council on Foundations, 2009, <https://www.issuelab.org/resources/27153/27153.pdf>

with grantseekers and a willingness to experiment with new measurement models are key to the ability to shift and respond to changing needs and priorities.¹⁵⁵

A DIFFERENT EVALUATIVE APPROACH

Traditional program evaluation explores the extent to which an organization or program brings about desired outcomes and what mechanisms it employs to do so (documenting key factors for successes, roadblocks, inefficiencies, etc.). Funders use this data both to help the program or organization improve and also, inevitably, to calculate their “return on investment” (ROI). Evaluation data helps grantmakers measure the extent to which their dollars have helped create the kind of impact they seek. With funders increasingly stipulating that grantees undergo evaluation, it is only natural to question what kinds of evaluation might be required of organizations that receive funding through participatory practices, and if/how funders ought to measure the impacts of the participatory practice itself. Grantmakers will want to know if using participatory methods actually leads to different grant outcomes than if those same grants were made through more traditional methods.

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Since participatory grantmaking is an emergent practice for many funders, they understandably seek information about its measurable impacts, specifically a desire for proof that PGM positively improves the roster of funded organizations and the communities they serve. There is limited available research directly measuring how PGM-funded organizational outcomes compare against traditionally funded organizational outcomes. While this question is central to gaining a more complete understanding of PGM’s impacts, it is also valuable to consider PGM’s process outcomes and not only the grant outcomes. Because PGM is heavily focused on the process of how granting decisions are made, it is essential to consider the impact on those involved in this process, and not limit definitions of success and audiences for evaluation to the funded organizations or projects themselves. In “Whose Impact Are We Measuring,”

Atlantic Fellow Rose Longhurst described how “external, top-down” metrics can be at odds with the PGM ethos and suggested that, instead, the community should help define success. Evaluations that focus only on pre-determined grant outcomes may miss meaningful benefits from the participatory process.¹⁵⁶

¹⁵⁵ Ben Liadsky, Andrew Taylor, Tanya Beer, Julia Coffman, and Jane Reisman, “Can Foundations Radically Transform How They Learn?” Center for Evaluation Innovation and Taylor Newberry Consulting, <https://www.evaluationinnovation.org/insight/can-foundations-radically-transform-how-they-learn/>

¹⁵⁶ Longhurst, Rose, “Whose Impact Are We Measuring? Proving the Efficacy of Participatory Grantmaking?” Grantcraft by Candid, December 19, 2018, <https://grantcraft.org/content/blog/whose-impact-are-we-measuring-proving-the-efficacy-of-participatory-grantmaking/>

Hannah Paterson, Churchill Fellow on Participatory Grantmaking, noted that funders often seek proof that PGM is “working,” more so than with other forms of philanthropy. Paterson suggested that grantmakers should instead focus on the impact of the participatory process itself, examining what, if anything, changed about who got funded, which ideas or values were prioritized, and which leaders and causes were given voice because of who was involved in the process.¹⁵⁷

For funders seeking to strengthen or expand their diversity, equity, and inclusion (DEI) work, focusing on process outcomes can help demonstrate potential shifts in power dynamics, trust, and dialogue with marginalized or underrepresented communities. Since participatory processes can help build relationships, increase organizational capacity, and prioritize community voices in the philanthropic process, designing evaluations that focus on these outcomes can yield valuable insights about social change, empowerment, and movement-building.

Evaluation of participatory practices can make the experience of the participant grantmaker a key unit of measurement and impact. Focusing on how participant grantmakers—including advisory board members, grant reviewers, grant-seeking organizations, community leaders, and others who may be involved—are affected by the process and how it influences their relationships, both with one another and with the funder, can be instructive for improving future PGM iterations.

As previously mentioned, in 2019, the Ford Foundation commissioned [nine research projects](#) about PGM. One of the projects, led by [the New England Grassroots Environment Fund](#), aims to answer the following questions about PGM evaluation:

- What are the best evaluation strategies for ongoing adaptations using real-time feedback from participants necessitated by [participatory grantmaking] processes?
- How can we ensure we [grantmakers] learn alongside frontline organizers on the strategies with greatest on-the-ground impacts in order to adapt and provide support in ways that reflect current reality and urgency?
- What are impacts of participatory grantmaking on all those participating – readers & grantmaking committee, applicants & grantees?

“ONCE WE RECOGNIZE LEARNING AS A SOCIAL MEANING MAKING ACTIVITY RATHER THAN A TECHNICAL TASK, IT BECOMES OBVIOUS THAT OUR ABILITY TO DO IT WELL IS CONNECTED TO THE RELATIONSHIPS WE HAVE BOTH INTERNALLY AND EXTERNALLY.”

—Center for Evaluation Innovation

¹⁵⁷ Interview, Hannah Paterson, Third Plateau, October 4, 2021

- How does that impact feed into opportunities to deepen in-person & virtual communities of practice to further collective learning and movement building?¹⁵⁸

Findings from this and the other projects are forthcoming.¹⁵⁹

EQUITABLE EVALUATION

Those who champion participatory grantmaking describe the need for a “shift in mindset” when discussing PGM, including prioritizing equity in grantmaking practices and evaluation. While some grantmakers may be more attracted to traditional program evaluation methods, since funding outcomes, organizational change, and process improvement can be complex and difficult to measure,¹⁶⁰ funders can look beyond to understand the impact of PGM funding. This includes adopting and incorporating a mindset that accounts for the systemic barriers many people with marginalized identities face (e.g., Jews of color, *haredi* [ultra-Orthodox] Jews, immigrants etc.).

Amy Arbretton, Evaluation Officer in the Effective Philanthropy Group at The William and Flora Hewlett Foundation, shared how as the foundation developed its approach to assessing its PGM efforts, it consulted [The Equitable Evaluation Framework](#)TM and associated principles.¹⁶¹ This Framework was co-created by partners with philanthropic, evaluation, and nonprofit experience to help evaluation work answer critical questions about the ways in which historical and structural decisions have contributed to the condition to be addressed, how strategies affect different populations, and ways in which cultural context is tangled up in both the structural conditions and the change initiative itself.¹⁶²

The Equitable Evaluation Framework places equity at the core of learning and evaluation work at every stage of the process. This includes disseminating the evaluation findings, a piece sometimes overlooked. The Equitable Evaluation Framework calls for learning to be shared broadly, across the field and back to the communities who are impacted by the project. This mindset shift also requires evaluation work to be “multiculturally valid” and “oriented toward participant ownership.”¹⁶³

¹⁵⁸ Christopher Cardona, “Participatory Grantmaking Matters Now More than Ever,” Ford Foundation, November 9, 2020, <https://www.fordfoundation.org/work/learning/learning-reflections/participatory-grantmaking-matters-now-more-than-ever/>

¹⁵⁹ At the time of publishing, two of the nine reports have been released: [Sharing Power: The Landscape of Participatory Practices and Grantmaking Among Large U.S. Foundations](#) and [Reflecting a Movement’s Principles in Grantmaking Structure: Evidence of the Benefits of Participation from the Disability Right’s Fund and Disability Rights Advocacy Fund](#)

¹⁶⁰ Interview, Anonymous, Third Plateau, October 2021

¹⁶¹ Interview, Amy Arbretton, Third Plateau, September 10, 2021

¹⁶² “Shifting the Evaluation Paradigm: The Equitable Evaluation FrameworkTM,” Equitable Evaluation Initiative (EEI) and Grantmakers for Effective Organizations, 2021, <https://drive.google.com/file/d/1UasrdkYCTrmunMLcXAiole5SoFttSeZ5/view>

¹⁶³ Ibid.

PARTICIPANT-CENTERED DESIGN

Participatory grantmaking invites a shift toward a more participant-centered design in evaluation. This means focusing on how the PGM process impacted those who participated in it, in addition to (or in some cases, instead of) the predetermined desired outcomes of the programs that were funded. Evaluators would consider what key problems the participants sought to solve, what they hoped to get out of engaging in the grantmaking process, and how they might have benefited or been affected by the process. Then they would build measurement models to address those lenses.

Kelley Buhles, an independent PGM consultant who launched [RSF](#)'s participatory grantmaking programs and who is one of the leaders of Participatory Grantmakers Community, a community of practice for people exploring PGM, described how some grantmakers approach their funding as "investments," which makes the ensuing evaluation/learning process more contractual than trust-based. Buhles suggested focusing on measurement/evaluation criteria that address the efficacy of the PGM process itself and its usefulness to PGM participants, such as asking about their relationships with other organizations. She encouraged using questions that allow for broad and nuanced learning.

PGM CONSULTANT
KELLEY BUHLES
SUGGESTED FOCUSING
ON MEASUREMENT/
EVALUATION CRITERIA
THAT ADDRESS THE
EFFICACY OF THE PGM
PROCESS ITSELF AND
ITS USEFULNESS TO
PGM PARTICIPANTS,

Some examples might include:

- To what extent, if any, was engaging in participatory grantmaking an effective use of your time?
- How did the time spent on the process measure against the amount of grants you were able to allocate?
- To what extent did this experience create meaningful or valuable relationships with other organizations?
- To what extent were there / do you expect there will continue to be collaborations with other organizations?¹⁶⁴

Answers to these types of questions can yield informative insights about the PGM experience for the participants, and how the process might be made more equitable, meaningful, and effective in the future.

¹⁶⁴ Interview, Kelley Buhles, Third Plateau, September 23, 2021



PHOTO COURTESY OF TZEDEK SOCIAL JUSTICE FUND

PARTICIPATORY EVALUATION

Grant recipients can participate in the evaluation design. A funder who asked to remain anonymous highlighted the importance of shifting from asking grantseekers for proof of their program's impact, and instead letting the grantseekers drive learning and measurement efforts.¹⁶⁵ This directive echoes the goals of [participatory evaluation](#), an approach with roots in international development work that has valuable applications for involving the key stakeholders, in this case grant recipients, in the development of the evaluation goals, key questions, and process.¹⁶⁶

Participatory evaluation allows grant recipients to share their own experiences and expertise, raising important questions that can yield more complete responses to evaluation questions and reduce reporting burdens for those involved. Incorporating grant recipients in the design of evaluation processes can help determine what impacts are really important to the com-

¹⁶⁵ Interview, Anonymous, Third Plateau, October 2021

¹⁶⁶ The Pace Center for Girls [recently reported](#) on the benefits of making program participants "full partners in evaluation, as experts of their own experience."

munity being served, in addition to (or perhaps even instead of) the funder's measurement priorities. This can help ensure that evaluations gather helpful information for grant recipients while minimizing burdens on staff time and capacity. Grant recipients can also be involved in the analysis of the findings, helping researchers make meaning of the themes and key trends. This form of [participatory analysis](#) has been employed by evaluators for decades, including recently by researchers measuring the benefits of participation in the Disability Rights Fund and Disability Rights Advocacy Fund, who "elicited participants' insights into the meaning of key findings and their significance within the context of the research objectives" to arrive at more accurate and resonant conclusions.¹⁶⁷

Amy Arbreton offered a view into The William and Flora Hewlett Foundation's efforts to incorporate grantseeker perspectives into the evaluation design: "Often evaluation is done to grantees without engaging them in the process. We've been trying to go in the other direction with our exploratory assessment of our participatory grantmaking efforts. What are they already doing in their own evaluation and learning process, and how can we build from their processes to inform ours? Where might we fund some of that for them?"¹⁶⁸

Grantmakers can strengthen their relationships with grant recipients by creating more opportunities up front for input about data collection. It is also helpful to allocate funding to cover the costs of complying with reporting requirements and to stay in regular communication as evaluations unfold. Isaac Luria, Director of Voice, Creativity and Culture at Nathan Cummings Foundation, shared that trust and transparency in the grantmaker-grantseeker relationship is paramount to deepening understanding both of the issue areas as well as the surrounding ecosystems and networks that can work together toward solutions.¹⁶⁹ Participant-centered approaches to learning and evaluation can lead to a more holistic understanding of an issue area and the community's needs, while opening the door for increasing trust in the relationship.

INCORPORATING GRANT RECIPIENTS IN THE DESIGN OF EVALUATION PROCESSES CAN HELP DETERMINE WHAT IMPACTS ARE REALLY IMPORTANT TO THE COMMUNITY BEING SERVED.

Incorporating PGM participants and/or grant recipients in evaluation design can also introduce challenges. Just as participatory grantmaking itself requires adept facilitation and carefully constructed processes to navigate and incorporate myriad perspectives, participatory evaluation can stray away from collective measurement goals and create confusion. Once again, strong facilitation, process expertise, and clarity of purpose are essential for developing successful participant-informed evaluations. Another challenge with participatory evaluation is the uniqueness of each evaluation. Since participatory evaluation is, by definition, a more customized

¹⁶⁷ Carlisle Levine, Melanie Kawano-Chiu. "Reflecting a Movement's Principles in Grantmaking Structure." 2021. Pg. 41. https://disabilityrightsfund.org/wp-content/uploads/ReflectingMovementsPrinciples_Nov2021_noQ.pdf

¹⁶⁸ Interview, Amy Arbreton, Third Plateau, September 10, 2021

¹⁶⁹ Interview, Isaac Luria, Third Plateau, October 13, 2021

approach to measurement, it entails more nuanced learning and responsive solutions. This customized approach can make it time-intensive and difficult to replicate.

SUMMARY

Evaluation models for participatory grantmaking exist, but because this is an emergent field, many questions remain about best practices for defining the purposes and audiences for PGM evaluation. The broader PGM community continues to work collaboratively on these questions, sharing learning and relevant frameworks through the PGM community of practice. Just as participatory grantmaking seeks to shift funding power from traditional grantmakers to the community, evaluating these efforts' effectiveness invites a shift from looking at grant outcomes to looking at process outcomes. While some may see the benefits of PGM as self-evident, for it to become a more widely accepted practice across philanthropy, there will need to be a strong evidence base that it leads to more effective grantmaking.¹⁷⁰

¹⁷⁰ Cynthia Gibson, "Participatory Grantmaking: Has the Time Come?," The Ford Foundation, October 2017, https://www.fordfoundation.org/media/3599/participatory_grantmaking-lmv7.pdf (p. 22)



PARTICIPATORY GRANTMAKING IN THE JEWISH COMMUNITY AND BEYOND

Many questions about participatory grantmaking remain unanswered, both in the broader philanthropic sector and, more specifically, in the Jewish community. As such, the Jewish philanthropic community has an exciting opportunity to collaborate, explore, test, and measure how PGM might benefit grantmaking, where its limitations are, and which kinds of organizations are best suited to benefit from its practices. Such endeavors would add valuable learning for Jewish grantmakers and all funders interested in PGM, in the United States and abroad. With this in mind, we have listed several ideas for continued learning below:

- **Convening a collaborative of Jewish grantmakers who want to test out PGM and share their experiences through a community of practice**
- **Drafting lessons learned “by grantmakers, for grantmakers” from exploring PGM**
- **Commissioning research comparing PGM grant outcomes vs traditional grant outcomes**
- **Bringing in PGM consultants to navigate different scenarios and offer support as to how to get started**
- **Convening panels of PGM funders and recipients to speak about their experiences**

Whether or not PGM is right for your organization at this time, it is our hope that this guidebook gives you an opportunity for pause and reflection: a chance to revisit the key values that inform your giving and the impacts you hope to have. Throughout the myriad conversations, reports, and articles that have informed our research, we have learned time and again the importance of introspection, both for organizational alignment and as a prerequisite to engaging with the field. Balancing internal goals, knowledge, and power with external experiences, priorities, and social movements is an ongoing dance, one that each grantmaker must perform for themselves, at their own tempo.

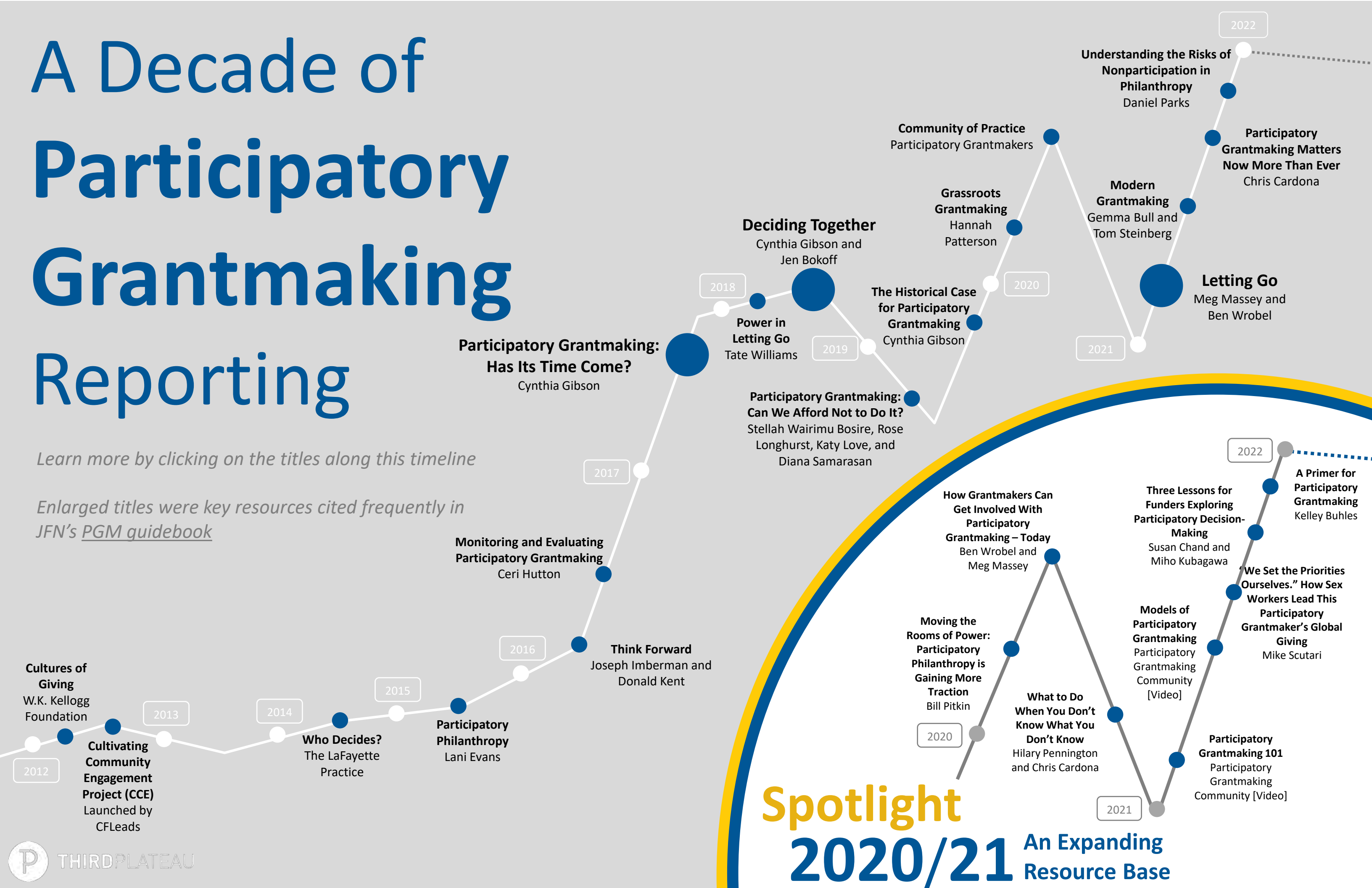
The Talmud speaks to the importance of balance between internal motivations with external relationships: Rabban Gamliel would permit into the hallowed study hall, the *beit midrash*, only students whose inner thoughts and feelings matched their outward-facing conduct and character – *tocho k'varo*.¹⁷¹ It is with this ethos that we believe participatory grantmaking can offer grantmakers a powerful opportunity to explore enhancing the parity between their work and the communities they serve.

¹⁷¹ Babylonian Talmud, Tractate Brachot, 28A

A Decade of Participatory Grantmaking Reporting

Learn more by clicking on the titles along this timeline

Enlarged titles were key resources cited frequently in JFN's PGM guidebook



APPENDIX B: PGM EVALUATION QUESTIONS

These questions are intended as a starting point to help grantmakers reflect on their PGM evaluation processes and to help focus on learning goals for measuring impact. There are two sets of questions:

- **Looking In:** These questions offer structure to help steer planning conversations for evaluating PGM, driving towards clarity about evaluation goals and the measurement process. These questions may help highlight opportunities for input and co-designing evaluations with participant grantmakers.
- **Looking Out:** These questions offer potential conversation starters with participant grantmakers and grant recipients as part of the evaluation itself.

The questions are not exhaustive. Organizations should iterate and customize for respective project and community needs. The items below have been informed by the overall research for the PGM guidebook and in particular by the following reports:

- Hannah Paterson, "[Evaluating Participatory Grantmaking](#)," Medium, November 14, 2019
- Fay Twersky, Amy Arbreton, Prithi Trivedi, "[Evaluation Principles and Practices: A Guide to Evaluation at the William and Flora Hewlett Foundation](#)," William and Flora Hewlett Foundation, March 2019

For additional questions to guide evaluation and research, see "[Deciding Together: Shifting Power and Resources Through Participatory Grantmaking](#)" by Cynthia Gibson and Jen Bokoff, page 46.

Looking In: Reflection questions for grantmakers and partners to consider in advance of evaluations

1. In thinking about the specific purpose of this evaluation, to what extent are we...
 - a. ...trying to understand the impact of the grant(s) on recipients?
 - b. ...trying to understand the impact of the participatory process?
 - c. ...trying to understand the impact on the community being funded?
 - d. ...trying to demonstrate the efficacy of participatory grantmaking?
2. Who or what is the unit of measurement? We will try to measure impact/outcomes/change *for whom*?
3. Who is involved in designing the evaluation?
 - a. What, if any, existing evaluation models will inform this evaluation?
 - b. What, if any, new approaches might we incorporate?

- c. Which voices are missing from the research and from informing the evaluation design?
 - i. How can we ensure representation from all relevant voices in this evaluation?
4. What data is involved in the evaluation?
 - a. Who is providing the data?
 - b. What are the time and resources required?
5. How can we best collect information to meet the learning goals?
 - a. What support do we need to gather information?
6. Who participates in the evaluation process?
 - a. What are their roles and responsibilities?
 - b. To what extent have we considered relevant power dynamics?
 - i. What, if any, actions should we take to mitigate these dynamics?
7. What are expectations for grantseeker involvement in the evaluation process?
 - a. How and when are these expectations communicated?
8. Who is the receiving audience for this evaluation? In other words, who will the findings be given to and to what end?
 - a. Are there other audiences who would/should benefit from the findings?
9. How will evaluation findings inform action?
 - a. What future decisions might this evaluation shape?

Looking Out: Questions to ask PGM participants and community partners in evaluation

1. What are you hoping to learn from this evaluation?
 - a. How can this evaluation best serve your needs programmatically and communally?
2. What has PGM funding allowed you to do?
 - a. How has this impacted the community you are a part of?
3. What are you most pleased with about the PGM process?
 - a. Why?
4. To what extent, if any, was participating in PGM a good use of your time?
5. [Grant recipients] How did receiving PGM funds feel similar or different from other forms of philanthropy?

6. What challenges did you encounter throughout the PGM process?
7. What are your biggest takeaways from this PGM experience?
8. What suggestions do you have for structuring the PGM process to be more effective/
successful in the future?
9. What, if anything, would you change about this PGM process?

APPENDIX C: GRANTMAKERS WHO USE PGM

This appendix provides an overview of organizations involved with participatory grantmaking, providing links to their websites and an overview of their funding focuses. Many of these organizations are featured throughout the Guidebook and others came up throughout the research process. This list is not exhaustive of all organizations in the PGM space.

[Brooklyn Community Foundation](#)

Brooklyn, NY
Focuses: Youth, Immigrants, Older Adults, Nonprofit Incubator

[Contigo Fund](#)

Central Florida
Focuses: LGBTQ Rights, Latinx, Immigrants, People of Color

[Crown Family Philanthropies](#)

Chicago, IL
Focuses: Education, Environment, Global Health, Health and Human Services, Jewish Giving

[Disability Inclusion Fund](#)

Minneapolis, MN
Focus: Disability Inclusion

[Disability Rights Fund](#)

Boston, MA
Focus: Disability Rights

[Edge Fund](#)

United Kingdom
Focuses: Social, Economic, and Environmental Justice

[Ford Foundation](#)

New York, NY
Focuses: Challenging Inequality - Civic Engagement, Creativity and Expression, Disability Inclusion, Climate Change, Workers, Technology, Gender, Racial, and Ethnic Justice

[FRIDA](#)

Toronto, Canada
Focuses: Women's and LGBTQ rights, Social Justice

[Global Greengrants Fund](#)

Boulder, CO and London, United Kingdom
Focuses: Climate Justice, Environmental

[Haymarket People's Fund](#)

Boston, MA
Focus: Social Justice

[Headwaters Foundation for Justice](#)

Minneapolis, MN
Focus: Social Justice

[Knight Foundation](#)

Miami, FL
Focuses: Education, Technology, Journalism

[Liberty Hill](#)

Los Angeles, CA
Focuses: Social Change, Racial Justice, Youth and Transformative Justice, LGBTQ and Gender Justice

[John D. and Catherine T. MacArthur Foundation](#)

Chicago, IL
Focuses: Climate Change, Nuclear Risk, Local Justice Reform, Reducing Corruption in Africa

[Mosaic](#)

San Francisco, CA
Focuses: Climate Change, Clean Air and Water, Healthy Communities

[National Lottery Community Fund](#)

United Kingdom
Focuses: Community, Culture Preservation

[Native Voices Rising](#)

Oakland, CA
Focuses: Advocacy and Civic Engagement in American Indian, Alaska Native, and Native Hawaiian Communities

[New England Grassroots Environment Fund](#)

Newmarket, NH
Focus: Grassroot Funding

NoVo Foundation

Brooklyn, NY
Focuses: Healing, Connection

Rawa Creative Palestinian Communities Fund

Ramallah, West Bank
Focuses: Civic Engagement, Palestinian Community Development

Red Umbrella Fund

Amsterdam, Noord-Holland
Focuses: Human Rights, Sex Worker Rights

RSF Social Finance

San Francisco, CA
Focuses: Economic Development, Equity and Inclusion

The Case Foundation

Washington, D.C.
Focuses: Social Change, Technology, Entrepreneurship

The Harry and Jeanette Weinberg Foundation

Baltimore, MD
Focuses: Place-based Grantmaking in Baltimore, Youth, Homelessness, and Jewish Poverty

The Hyams Foundation

Boston, MA
Focuses: Social and Economic Justice

The New York Women's Foundation

New York, NY
Focuses: Women's Rights, LGBTQ Rights

The Other Foundation

Johannesburg, South Africa
Focuses: LGBTQ and Human Rights in Africa

The William and Flora

Hewlett Foundation

Menlo Park, CA
Focuses: Education, Environment, Gender Equity, Governance, U.S. Democracy

Trans Justice Funding Project

San Francisco, CA
Focuses: LGBTQ Rights, Social Justice

Tzedek Social Justice Fund

Asheville, NC
Focuses: LGBTQ and Racial Justice, Antisemitism

UHAI EASHRI

Nairobi, Kenya
Focuses: Sex Worker Rights, LGBTQ Rights

Vodafone Aotearoa Foundation

New Zealand
Focus: Indigenous Rights

Wikimedia Foundation

San Francisco, CA
Focuses: Education, Technology

Jewish Funders Network is an international community of foundations and philanthropists with over 2,500 members from 15 countries around the world. Its mission is to promote meaningful giving and take an active part in the processes that change the thinking and action patterns of philanthropy in the Jewish world. Fully a quarter of JFN's members are Israeli, and JFN Israel is a leader in developing the country's philanthropic field by advocating for giving-friendly government policies, introducing donor-advised funds, and offering a variety of services.

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