

**SEMI-ANNUAL CONFERENCE
SAN FRANCISCO
JANUARY 24-25, 2013**

Inclusive Grantmaking for Impact: Strategies to Strengthen Movements

Thursday, January 24, 2013

10:00am-12:00pm

***Please note that these notes have not been reviewed
by the speakers or organizers of this session***

Session Organizers:

- Mónica Enríquez-Enríquez, Program Officer, Astraea Lesbian Foundation for Justice
- Annie Hillar, Learning and Evaluation Specialist, Mama Cash
- Kellea Shay Miller, Program Manager, Astraea Lesbian Foundation for Justice
- Diana Samarasan, Executive Director, Disability Rights Fund

Facilitator:

- Vini Bhansali, Executive Director, International Development Exchange (IDEX)

Panelists:

- Mónica Enríquez-Enríquez, Program Officer, Astraea Lesbian Foundation for Justice
- Annie Hillar, Learning and Evaluation Specialist, Mama Cash
- Diana Samarasan, Executive Director, Disability Rights Fund

Sponsors:

- IHRFG Disability Rights Working Group
 - Astraea Lesbian Foundation for Justice
 - Disability Rights Fund
 - Mama Cash
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This session focused on strategies for being more inclusive in three specific aspects of grantmaking: convening, budgeting, and communications.

Vini asked the panelists what inclusive grantmaking means to their organizations.

- Diana Samarasan responded that at the Disability Rights Fund (DRF), attention to inclusivity happens at many levels. When looking at an organization, you have to consider the structure and who benefiting from the funds, from the governance, to the advisory, to the staff. Persons with disabilities must participate in decision making that affects them. DRF started with a year of dialogue between donors and activists and persons with disabilities, which reflects our core belief: “nothing about us without us.” One active strategy is supporting grantee convenings annually. Another key element of our work is encouraging other funders to include persons with disabilities in their grantmaking.

- Mónica Enríquez-Enríquez responded that Astraea sees inclusivity as a feminist value. It is critical to not speak *for* the other/grantee but speak *nearby*. Astraea's work goes beyond advocating for same sex marriage and includes issues such as access to healthcare for transgender persons and policy advocacy on gender identity laws. Inclusivity is part of who is funded, who makes decisions, and how funding happens. Astraea provides flexible funding to grassroots groups led by LGBTQ persons. In the U.S. 90% of groups supported are led by people of color or are mixed, with a commitment to racial justice.
- Annie Hillar responded that Mama Cash looks at inclusive grantmaking as a process: how decisions are made (strategies and messages); who is involved, how grants are communicated (does communications staff ask grantees if they feel authentically represented in materials). It is about resources and power. How do you make grantmaking decisions without being directive? Funders raise and grant money because groups need funding to do their work and shouldn't have to spend all of their time doing that. It's about accompanying and walking along with. Funders often emphasize organizations working to push status quo, but funders also need to think about whether they are pushing the status quo within the philanthropic community.

Vini asked how the panelists suggested being inclusive with regard to communications, convenings, and budgeting.

- Mónica responded that inclusive communication is a must. Thinking about the politics of representation is important and to be careful about images and the meaning they convey. Also always ask permission and credit the photographer.
- Diana presented a video to illustrate points on inclusive communication. In terms of convening aims, this can be used to increase diversity and depth of the movement, bring marginalized voices in, build joint advocacy strategies, and connect with key actors – government, civil society, etc.
- Annie responded translations are important to show that we are attempting to reach diverse language groups. Building movement is important, we do this through convenings, but it is also important to recognize that the process of creating the convening to be as important as the convening itself. For example, who is creating the agenda? There is also a distinction between convenings funders host and convenings grantees host. When grantees are invited to speak at convenings, they are taking time out of on the ground activism. Mama Cash has learned, for example, when inviting girls to conferences funders need to budget more for adult supervision so that their parents are comfortable with them leaving the country.

Vini asked about challenges to inclusive grantmaking.

- Annie responded that in Mama Cash's budget, at least 5% (190,000 Euro) is designated to support girl-led organizations and every year, they have failed in reaching this target. They realized that they are making targets without asking girls what they really need. It's about safe spaces (not about money for legally registered NGOs) and putting into place a community of practice. It may not be that 5% will go out in grants for girls, but that may support convenings or other activities based on what they want.

- Diana responded that it is important to take into account power dynamics within movements. Within the disability rights movement, for example, power is generally concentrated among men with physical disabilities. When a funder brings more marginalized groups into the conversation, these new voices challenge the power dynamics within the group. As one example, DRF funds a group of people with dwarfism in Uganda who had never been in a meeting with other groups in the disability movement. They were jeered at by others in the disability rights movement and it took a lot of process work. But now, five years later, little people are included within the larger disability movement and are recognized as people with disabilities by the Ugandan government. Bringing in marginalized communities upsets success for some time and slows down movements because of a need for the movement to reconstitute itself. Do we go after impact to tell our donors (contributed to passing this law) or process (where everyone is included)?
- Mónica shared that Astraea funded a convening that brought U.S. women of color grantees to a North-South convening. It was difficult for them to realize their power compared with the activists from the South as they are marginalized in the U.S., but are less so comparatively. Another challenge relates to making funding available for health. Astraea is funding a group in Guatemala working on passing a gender identity law. The Executive Director approached Astraea for support because of health issues she was facing as a transgender woman and they realized they had no funds to support her. Either there needs to be a fund able to provide this type of support or a line for health/benefits needs to be built into funders' budgets. Transgender people cannot access the public health system without encountering transphobia.

Question & Answer:

- Sometimes there are grants that don't work out ("failing forward"), but are still a success because they raise visibility or for other reasons. How do you talk to your donors or peers about this type of funding when there is such an emphasis on impact?
 - "Failing forward" is an intentional approach; it's about movement building. These grants can support groups to come together and empower themselves. One potential example of "failing forward" is an organization closing because the activists went on to other efforts. Failures are often lessons learned to improve grantmaking moving forward.
 - Contextualize and understand that this work takes time. As one example, a gender identity law just passed in Argentina, but people have been working on this since 1997.
 - DRF had to explain that it is in the business of supporting movement building rather than building one organization's capacity. There is a tension – how much time and money do you devote to singular organizations vs. the overall movement?
- Some foundations recognize that inclusion is an important piece of their work but they do not prioritize it. Inclusive practices cost money and budgets are tight. For example, additional funds need to be built in when supporting a person with a disability to attend a convening. How do you make the case for integrating inclusion throughout a foundation?
 - Foster open conversations, educate at large, and meet often with communications teams.
 - There is a cost to inclusion but there is also one to exclusion, which should be made clear through conversations. Presenting these cases to donors can highlight exclusion: how much do you know about disability rights in the global south? How many

organizations can you name? This would show ineffective strategies as the donors may show a lack of knowledge, credibility, and accessibility.

- Astraea, USAID, and Williams Institute work together in the Global LGBT Human Rights Partnership and look at the costs of exclusion. Encourage finance and operations staff to travel with you to meet with grantees so that they have a better sense of the programmatic work.
- It's difficult for grantees to say no when asked to convene by funders. How do you ascertain when grantees really want to be convened?
 - Involve grantees in the organizing committee from the start and support convenings coming from grantee partners themselves.
 - DRF makes clear that receiving a grant involves participation. All convenings are arranged with grantee partners.
 - Mama Cash is developing an internal protocol for convenings in order to make space where grantees may bring their wisdom and expertise. For example, a grantee may propose sessions and other grantees would vote on it and that may yield different sessions than Mama Cash wanted to include.
- How do you define the role of grantmakers beyond grantmaking?
 - Grantmakers are part of an educational process: receiving feedback in order to learn how to strengthen movements and educate others. DRF uses grantmaking and advocacy as its two major strategies.
 - The intention of inclusion at the core makes donors become more than grantmakers as they walk in solidarity.
 - What does it mean to be an ally? Thinking about personal places of privilege may cause internal processes of transformation.
 - Mama Cash engages in advocacy, grantmaking, and resource mobilization.

Small Group Discussion: Convening:

Panelists:

- Emily Martinez, Director, Rights Initiatives, Open Society Foundations
- Diana Samarasan, Executive Director, Disability Rights Fund
- Wanja Muguongo, Executive Director, UHAI-the East African Sexual Health and Rights Initiative

The small group discussion centered around the following questions:

1. What's important to you about convening? Why do you care?
 - One challenge is raising funds for convenings. Global Fund for Women's convenings usually happen from restricted funding yet demand a lot of time and money to organize. Due to the content of the convenings, it is much easier to raise money for capacity-building or training.
 - The Association for Women's Rights in Development (AWID) tri-annual forum costs \$4 million. Convenings are part of the process and are not added events; this is easier to explain to funders. The lead up to forums is as important as the forums themselves.
 - UHAI does not get consultants to work on convenings but rather a committee of grantees.
 - Learn by experience and attendance. For example, it is important to utilize evaluation to continually reshape convenings.

- The Dublin platform for human rights defenders, where all sessions are led by HRDs, is at risk. It is critical to have these convenings in order for people to feel valued.
 - Work with professional volunteers and look for innovation and replication as convenings are important.
 - With criminal justice, three convenings took place and it took the third to find the people who were needed in the room. These events catalyzed a movement, which ten years later this led to a formerly incarcerated people's movement.
2. What are we not seeing that is critical to inclusive grantmaking?
- Convenings that bring together a variety of grantees and donors, as well as cross movement convenings
 - Hearing more about inclusive convenings and creative ways to address conflict
 - Convenings that are more politically involved or having a readiness to expand the purpose of the convenings. The risk involved with this is the increased threat to activists.
 - Funders spending more time attending civil society organized convenings in addition to hosting their "own" convenings
 - IFIP. 60% donors, 20% indigenous leaders, 20% NGOs. Use the diversity matrix to call for indigenous peoples to attend the conferences. Create more access to donor conferences, inviting a greater diversity of people to attend.
 - Create follow ups following conferences. Will there be funds from grantmakers available for continued collaboration? Will there be logistical support?

Participant examples:

UHAJ has a grantmaking system that is inclusive by design. Convenings have different attendants and spaces every two years. Decisions about the content of the convenings are made by the grantee partners. UHAJ ensures funding for these and chooses the venue in order to manage security. Interpretation and translation of material is included. Additionally, every organization nominates people as a means of including those who do not ordinarily attend conferences.

Open Society Foundations: In working on a convening about the right to legal capacity within disability funding, we engaged an expert consultant who called and interviewed every participant attending the meeting and used the responses to develop an agenda. At the convening, grantees presented to one another, which established the baseline for conversation. With criminal justice reform, OSF supports groups to form coalitions, but bringing groups together may cause confusion: Why are only grantees attending the meeting? Who does this meeting serve—the donor or the grantees? Still trying to understand the funder role in doing this well.

Small Group Discussion: Communication

Panelists:

- Mónica Enríquez-Enríquez, Program Officer, Astraea Lesbian Foundation for Justice
- Rauda Morcos, Co-Founder, Aswat; Regional and Community organizer, MENA region, MantiQitna Qamb (Palestine)

The small group discussion centered around the following questions:

1. What is important to you about inclusion in communication and why do you care?
2. What are we seeing/tracking that is vital to impact communications?

Key points included:

- Define the relationship between the grantee and the donor, or the partner and the organization. Once it is defined, it is easier to understand the dynamics, the limitations, the boundaries, and the other's perspective. Communication also becomes easier because it is clear where each side stands in the relationship. This helps in the process of setting borders for the relationship, and to recognize what decisions are made by whom and when.
- Respect confidentiality in communications, reporting, etc. Understand that sometimes we, as grantmakers, can't report certain things, names of people, etc., for security reasons.
- The other side of communication, related to images used by foundations, is not really linked to the ground. Not many funders ask the grantee/partner if a photo can be used. Grantmakers should be sure to ask for permission to use photos and to give credit to who deserves it.
- Try to communicate all the values, acknowledge that the context affects the meaning of what is being communicated.
- Some words are difficult to use across borders. Translation of language is a big issue.
- What is a success story for a donor might not be for a grantee. Is not just a matter of giving the credit to who deserves it, it goes deeper than that.
- Partner's contributions need to be communicated to other organizations and funders.
- Using communications to tell success stories is also a challenge. Telling the story, not just showing a photo, can be more helpful. Maybe a video can help more. We are about supporting processes, not results, so we need to use communication to support their processes. It is about how to capture reality. This needs to be in the plan.
- It is also a matter of the donor letting go. Donor has a sense of control sometimes, which is not good for collaboration. The fact is that an unequal power relationship will always remain.

Small Group Discussion: Budgeting

Panelists:

- Annie Hillar, Learning and Evaluation Specialist, Mama Cash
- Andrea Lynch, Program Officer, Foundation for a Just Society
- Lauren Garcia, Executive Director, Semillas (Mexico)

The small group discussion centered around the following questions:

1. How do you budget more inclusively?
2. How do you look at various departments in your organization and make their work more inclusive, too?

Laura Garcia began the discussion by listing some ways Semillas strives to be more inclusive of grantees through its budgeting process. Semillas budgets to include all staff in site visits, not only program officers. This is important for administrative staff, for example, to gain more understanding about challenges of various communities. Semillas also contracts former grantees to do capacity building for new grantees. When Semillas is invited to speak at an event, they sometimes ask grantees to go so that they may speak for themselves. Because Semillas is both a grantmaker and a grantseeker, they are

always aware that what we ask of our funders should be what we provide to grantees (for example, flexibility).

The following key points emerged in the discussion:

- It is critical to introduce the Board of Directors to the ideas and processes of inclusion and to ensure their understanding and support.
- Ensuring accessibility for disabled individuals is another crucial way to be inclusive. This can mean budgeting for personal assistants on long flights, for instance, as a budget line item rather than an extra line item. There are some ways to be more accessible that don't cost much money, like making a website's font larger.
- Recognizing the costs of exclusion can be a motivator to begin to budget for inclusion.

Andrea Lynch closed the discussion by offering several take-away points:

- It is important to reflect on one's own organization's capacity to be transparent and participatory. At the same time, it is crucial to assess the transparency of other organizations, such as grantees, as well.
- Find ways to bring grantees into the entire chain of decision-making.
- Be careful to think ahead when planning participatory strategies, trying to anticipate potential problems. For example, think about the implications of sharing your budget with grantees who may raise concerns about large expenditures.

Report back in Plenary:

- Think more about joint convenings
- Think carefully about language used. What is meant by "partner"? Is it okay to be just a funder and grantee if there really isn't a partnership?
- Budgeting: importance of exposing operations and administrative staff to grantees to understand the context

What are we not talking about?

- The role of new media and how to talk about it and interact with grantees; privacy and security challenges
- Pushing back on "expensive" language and reframe; use different language when talking to donors, as movement building does not happen solely through grants
- Conflict in inclusive convenings (bringing together people who have never worked together before)

If grantees teach funders anything, it is that they need to push beyond their comfort zones and ensure that they can do their work most effectively. If that means funders look hard at their internal practices and make changes, then that's what it takes.