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**JULY 15-16, 2014**

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**Bringing the Field to Philanthropy: The Role of Participatory Grantmaking**

July 15, 2014  
3:30-5:00pm

***Session Organizers:***

- Nadia van der Linde, Coordinator, Red Umbrella Fund
- Matthew Hart, Principle, The Lafayette Practice

***Facilitator:***

- Catherine Townsend, Program Officer, Wellspring Advisors

***Panelists:***

- Matthew Hart, Principal, The Lafayette Practice
- Ruby Johnson, Co-Coordinator, FRIDA | Young Feminist Fund
- Surina Khan, Interim Director, Democratic and Accountable Government, Ford Foundation
- Diana Samarasan, Founding Executive Director, Disability Rights Fund

***Sponsors:***

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| • FRIDA   Young Feminist Fund | • IHRFG Disability Rights Working Group |
| • Levi Strauss Foundation     | • Wikimedia Foundation                  |
| • Mama Cash                   | • Red Umbrella Fund                     |
| • Disability Rights Fund      |   |

Catherine Townsend from Wellspring Advisors introduced the panel as an exploration of why participatory human rights funders are important. Participatory Grantmaking Funders (PGFs) are not a homogenous group, and the panel explored how more traditional funders can add some participatory practices to their structures.

Mathew Hart from the Lafayette Practice presented an overview of a recently completed baseline study of PGFs. It aimed to illuminate best practices of PGFs and to establish a baseline for future models. The role of peer reviews was key to the study, enabling accountability to the populations and communities with vital expertise and lived experience. The review also found that few donor partners have participatory funders but the vast majority of their budgets go to grantmaking. PGFs also use consultants and, although none have endowments, they are generally financially stable. Leadership and mentorship is the point of entry for many grassroots leaders into philanthropy, so participatory funders act as a pipeline for bringing grassroots

leaders into philanthropy. Furthermore, having grassroots leaders involved with philanthropy adds to grantmakers' responsiveness because of their ongoing on-the-ground knowledge.

The study found that PGFs are consistently under-resourced and funders are reluctant to give funds to PGFs. Moreover, PGFs often have to deal with complex logistics. For example: convening grantee approval committees requires a lot of logistical planning. Overall the study showed there to be a lot of benefits to using PGFs; they are overwhelmingly effective, they serve as powerful intermediaries and a learning hub, and they are all professionally managed.

Diana Samarasan discussed ways the Disability Rights Fund (DRF) is reinforcing the PGF model. When initiating the fund, Diana to contend with the fact that people living with disabilities (PWDs) were rarely thought about prior to the 2008 Convention on Persons with Disabilities, and few donors knew much about people with disabilities as human rights activists, often regarding disability as a charity issue rather than as a human rights issue. There were also very few funded organizations led by people with disabilities.

DRF became a space for people with disabilities and donors to learn from each other.

DRF has a 12 member global advisory panel whose members are largely nominated by the International Disability Alliance. The grantmaking committee of the Fund combines these activist voices with donor participation, affirming the basic human rights principle of participation underlying the Convention on Persons with Disabilities. DRF is influential for knowledge sharing: disability rights activists often do not know much about grantmaking, and donors do not know about issues faced by PWDs. Working with a PGF like DRF encourages donor to be more aware of disability issues in their broader grantmaking.

Ruby Johnson from FRIDA explained the organization's formation in 2010 and their focus on strengthening young feminist groups and movements working on human rights, (including LTBI and sex worker rights). Their grantmaking includes ways to make groups multi-generational, increase and improve resources for young feminist activists, and ensure young feminists are present in advocacy spaces. Applicants who apply for funding vote for where the grants go within their region. FRIDA trusts them to make these decisions and the organization sees this as key for creating leadership and shifting dynamics in philanthropy. It also enables them to reach grassroots groups to keep movements growing. FRIDA ensures applicants can learn and share experiences, remaining accountable to each other rather than the funder.

Surina Khan from the Ford Foundation described their experience working with PGFs, and their focus on getting input from peers as they develop strategic grantmaking. Surina trained community activists in grantmaking, finding activists were experts in local needs but needed to learn how to do philanthropy. Because the convening took so much time and effort, taking activists away from their work, she decided that moving forward she would use communities and activists in an advisory way while maintaining a commitment to inclusiveness and transparency.

The overall theme to each presenter's PGF is that they are leveraging the expertise that's in the field while developing leadership skills of community activists. FRIDA have found that by using the democratic process applicants voting for cohorts of grantees, the diversity of finalist grantees usually comes naturally. FRIDA sometimes sees familiar fractions appearing within

movements. A challenge is to ensure a diverse set of grantees, such as trans\* and youth-led organizations. FRIDA is also looking at their own outreach and voting processes to see how they can better reach marginalized groups. They are considering thematic voting and they have already started regional voting in several languages. While they do not have a thematic portfolio, it is an opportunity to note trends in priorities among young feminists worldwide.

Diana Samarasan spoke about the perception that PGFs take up too much time and money, and that there will always be conflicts of interest. However, it is her contention that without participation throughout the grantmaking process, funders and activists lose more time and money in the long run. A lot of funding strategies of “traditional funders” have gone wrong due to lack of understanding of the field. Although including PWDs in the DRF structure adds costs for accessibility, this has been money well spent and DRF is able to model the practice of inclusion. Another challenge is the three-year rotational structure of the advisory panel and grantmaking committee. New ideas come in with each new cohort, which is great, but training is needed and it often necessitates changes in grantmaking strategies, guidelines and templates. Three of the seats in the advisory panel are reserved for human rights experts from other fields who are called Bridge Builders to encourage sharing of lessons learned between movements. The rotational process and including people from other movements enables DRF to be a true learning organization and leaves open space for innovation.

Surina echoed that there is often a tension in philanthropy between funding for the long-term while cycling in new partners and new opportunities. New people come in and there are new ideas. This is part of philanthropy and social change work and funders need to be responsive. Matthew concluded that funders need to realize that PGFs are high-trust environments where traditional philanthropy can do learning, exploration and network building. It doesn’t have to be a new program, but it is an important area to explore.

### **Question and Answer**

**What is more important, the process or the grant itself? Are these time-bound processes that have a beginning or end?**

Ruby underlined that the process is definitely as important as the grant. The learning starts with the moment of application. Applicants can begin to learn about other groups and form relationships. FRIDA also provides capacity development support, which is an ongoing process. FRIDA is continuing to figure out its role in terms of time: Is it FRIDA’s role to continue to fund groups year after year? FRIDA sees its role as supporting groups to grow and leverage new resources. Diana agreed and emphasized that even if a grantee is rejected, they learn a lot from the process.

**How much time do you take in trust-building?**

Diana emphasized that trust building depends on the structure of the Fund; the majority of staff, advisors, and governance are PWDs because that is how DRF builds credibility and legitimacy in the disability rights field. DRF also takes a movement-building approach, partially supported through the holding of grantee convenings in its target countries every year so that grantees can build collaboration, trust, and joint advocacy strategies. Surina agreed that trust building is key in a PGF model. People need to trust each other to disagree and to agree, as well as to ask tough

questions. Those relationships are important and happen informally. Matthew added that trust is also needed between traditional philanthropy organizations and PGFs.

### **How do PGFs balance conflicting priorities between traditional donors who support the PGFs and the participants' priorities?**

Diana said this has not been a huge conflict within DRF. DRF provides a way for large donors to reach communities that they can't reach otherwise. It is a matter of finding a vehicle that allows traditional donors to be able to grant where they need to. DRF is often that vehicle for donors. DRF takes on the burden of supervision, financial management, and reporting, and does not pass on that burden to its grantees. Ruby added that it is not as dichotomous as one might think. FRIDA has been a bridge between donors and grassroots and an advocate for creative and participatory ways to capture change. Donors often ask FRIDA: What are priorities of young feminists? FRIDA is well positioned to know. In terms of mobilizing resources, FRIDA sees giving as a political act and it looks to young feminist philanthropists as a main target. It is also about deciding from whom or which institution FRIDA accepts money, who they do not accept money from and how it connected to FRIDA's politics.

### **Is there potential to make large grants with the PGF approach?**

Matthew said that PGFs are ready to go to scale. They have everything in place to handle the money and the capacity to handle the necessary requirements. All the pieces are there. Both Ruby and Diana emphasized that they could handle much large sums of money and have the capacity to make those grants.

### ***Biographies of Panelists:***



#### **Matthew Hart, Principle, The Lafayette Practice**

Matthew Hart is Funders Concerned About Aids' (FCAA) Senior Strategist for Europe and is the founder and Principle of the Paris-based Lafayette Practice, a philanthropic management and advisory firm. Matthew's philanthropic leadership is exemplified by his role as President of the Board of Directors of the Calamus Foundation, and a Board member of Funders for LGBTQ Issues. Matthew consults widely with foundations and individual philanthropists to advance LGBT equity and human rights. He is known for founding Spiral Q, Philadelphia's nationally acclaimed nonprofit cultural organization. Matthew served as Founding Executive Director of the Spiral Q for eight years, founding numerous citywide events that continue to this day. While in Philadelphia, Matthew served as a member of the community funding board of the Bread & Roses Fund, the Philadelphia Cultural Fund, PHILAGRAFIKA, the Sustainable Business Network, and The Leeway Foundation for Women and the Arts and other regional foundation Boards.



#### **Ruby Johnson, Co-Coordinator, FRIDA | The Young Feminist Fund**

Ruby Johnson is a young feminist activist from Sydney, Australia. She is currently based in Oaxaca, Mexico, where she works as FRIDA | The Young Feminist Fund's Co-Coordinator. Ruby spent two years working in Cambodia with UN Women in the area of governance, CEDAW and women's human rights, in particular supporting young Cambodian women's leadership and advocacy. Ruby

also worked with Amnesty International in Australia for three and a half years in human rights activism, organizing and campaigning. Prior to joining FRIDA, Ruby coordinated a program on eliminating avoidable blindness in Cambodia and Palestine and led the design of a gender strategy at the Fred Hollows Foundation. Ruby has also spent time working in remote indigenous communities in Australia and Mexico alongside women's collectives, working on women's human rights and social change. She holds a Masters in International and Community Development focused in Gender from Deakin University, Australia and a Bachelor of Arts in International Studies from the University of New South Wales, Australia.



**Surina Khan, Interim Director, Democratic and Accountable Government, Ford Foundation**

Surina Khan is interim director of Ford Foundation's work in democratic participation, where she oversees three grantmaking initiatives focused on increasing civic and political participation, promoting electoral reform and democratic participation, and promoting transparent, effective and accountable government. She previously directed Ford Foundation's work on LGBT rights, women's rights and HIV/AIDS, and comes to her work with more than two decades of experience in the social justice sector. Before joining the foundation, Surina served as Vice President of Programs for the Women's Foundation of California, providing strategic direction for grantmaking, strengthening the organizational effectiveness of social justice organizations and overseeing the Women's Policy Institute, a policy advocacy training program for community-based leaders. She previously served as Executive Director of the International Gay and Lesbian Human Rights Commission, where she worked to advance the human rights of LGBT people and help people living with HIV/AIDS worldwide utilize human rights legal instruments. Surina has also worked as a research analyst for Political Research Associates, conducting groundbreaking research on the ex-gay movement and the anti-LGBT religious right. Surina was the 2010 Regents' Lecturer in the Community Studies Department at the University of California, Santa Cruz.



**Diana Samarasan, Executive Director, Disability Rights Fund**

Prior to her position as Executive Director at Disability Rights Fund, Diana directed the Mental Disability Advocacy Center in Budapest, Hungary, a legal advocacy organization which litigates abuses of rights of persons with mental disabilities in Eastern Europe and Central Asia. Diana also worked with the American Refugee Committee and Doctors of the World, addressing issues such as access of vulnerable populations to reproductive health services, tuberculosis control, and deinstitutionalization. Diana has advanced degrees in Public Administration and Psychology, and is a Board member of the United States International Council on Disability and on the Steering Committees of the International Human Rights Funders Group and Opportunity Collaboration.

**Catherine Townsend, Program Officer, Wellspring Advisors**

Catherine is a Program Officer at Wellspring Advisors and serves on the board of the Disability Rights Fund as the co-chair. From 2004-2008, she coordinated programming for the International Human Rights Funders Group, organizing semi-annual meetings and managing membership development and communications. Previously, Catherine worked at the Mertz Gilmore foundation and the LuEsther T. Mertz Charitable Trust.