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SHIFTING POWER

**The Social Innovation Forum's
Participatory Philanthropy Pilot**

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About the Social Innovation Forum

The Social Innovation Forum (SIF) is a place-based intermediary. Located in and serving Eastern Massachusetts, its mission is to create positive social change by engaging leaders, strengthening organizations, and building networks. **SIF is a connector and capacity builder, bridging the gap between funders and deserving, but often overlooked, grassroots nonprofits.** Since its inception in 2003 (originally as a program of Root Cause and becoming an independent nonprofit organization in 2015), SIF has directed \$61.9 million in cash and in-kind resources to nonprofits.

SIF's flagship program, the Social Innovator Accelerator, helps nonprofit organizations gain visibility, expand their networks, and connect with philanthropic and in-kind resources to accelerate their work. Each year, SIF partners with local funders to select up to eight nonprofits to receive 24 months of focused support from SIF and its partners, including consulting, executive coaching, and presentation advising.

In the first year of the program, after a focused consulting engagement, SIF hosts its annual Showcase event, where nonprofits pitch to an audience of local business and philanthropic leaders. After the Showcase, they stay in the SIF network and can continue to access support and services from SIF and its in-kind partners.

Philanthropy and Power

As an intermediary, SIF acts as a link between funders and nonprofits. In this role, the SIF team seeks to mitigate the power imbalances inherent in philanthropy.

Philanthropy has existed in some form in the United States since before the country's founding. From the establishment of religious and learning institutions in the early-to-mid 1600s that sought to aid the less fortunate, to charitable giving totaling nearly \$500 billion in 2022 alone, philanthropy has become an integral piece in ensuring the social welfare of people in the U.S.¹

A significant portion of the wealth amassed in the U.S. and distributed through philanthropic giving can be traced back to extractive and exploitative practices, such as slavery and displacement, which primarily affected communities of color. Today, when analyzing the amount of philanthropic dollars being funneled back into these communities, percentages fail to reach even 10% of total giving year over year.² Representation of communities of color is also lacking amongst the staff of philanthropic foundations. A study conducted by the Council on Foundations found that people of color make up 28.9% of full-time positions. When moving up the promotional pipeline, this number shrinks to 12% at the CEO level.³

Philanthropic organizations control giving agendas and criteria applicants must fulfill to be eligible for awards, oftentimes with a lack of proximity to and knowledge of social issues and impacted communities.⁴ In tandem with the limited organizational capacity and resources of small and grassroots nonprofits, this practice can eliminate promising nonprofits from applicant pools. To attract or maintain funding, nonprofits often face pressure from funders to disproportionately prioritize scaling their

operations to serve more individuals, sometimes at the cost of programmatic depth or innovation that may address root causes of social issues in addition to symptoms.⁵ Furthermore, funds that are given to communities of color are more likely to come with strings attached in the form of restrictions dictating when, where, and how they can be spent. One study found that Black-led organizations had 76% fewer unrestricted assets than white-led ones did.⁶

Against this backdrop of power imbalance and inequity in philanthropy, the SIF team decided to pilot a new iteration of the selection process for the Social Innovator Accelerator — one that was based on the tenets of participatory philanthropy.

Participatory philanthropy is an approach in which funders cede decision-making power to impacted communities.⁷ In practice, this deliberate redistribution of power can center impacted communities as subject matter experts, distribute power among communal stakeholders, operate with a social justice lens, challenge inequitable selection processes, and expand beyond monetary giving into intangible assets.⁸

In 2021 and 2022, SIF embarked upon a two-year participatory philanthropy pilot. While SIF's standard Accelerator selection process involves more participation than the traditional philanthropic model due to its involvement of local issue experts, the organization recognized it could do more. The team's intention was to shift traditional power dynamics between funders and nonprofits by shifting decision-making for SIF's Social Innovator Accelerator selection process from funders to nonprofit leaders with lived and learned experience, who they believed were uniquely positioned to evaluate applicants for the Accelerator program.

Participatory Philanthropy at SIF

Before SIF started its participatory philanthropy pilot in 2021, the traditional Accelerator selection process involved three steps:

- › **Creating Social Issue Tracks:** After drafting a list of social issue areas that SIF aimed to target during a specific Accelerator cycle, the organization then collaborated with “**track partners**” or funders interested in supporting organizations addressing the identified social issue areas. Together with local issue experts, the SIF team and track partners developed “**social issue tracks,**” including criteria about what SIF and track partners were looking for in applications.
- › **Application Process:** Accelerator applicants submitted a first-round application, which was reviewed by the SIF team and track partner. Together, they selected semi-finalists, who were invited to submit a second-round application. An evaluation committee composed of nonprofit leaders, academics, funders, and other groups with knowledge of the social issue area evaluated the second-round applications and gave input to narrow down the pool on each track to three or four finalists. The finalists hosted site visits with SIF staff and track partners.
- › **Selection:** On each track, SIF staff and track partners selected one finalist to be the “Social Innovator” and participate in SIF's Accelerator program.

Timeline

The following is a comprehensive timeline of how SIF approached designing and executing the participatory philanthropy pilot.



December 2020

SIF staff met with their Alumni Council, composed of past Social Innovators, to select a track topic for the pilot. The group decided upon Community Approaches to Advancing Racial Justice. Recognizing that racial injustice often intersects with a number of related social issues, the SIF team and Alumni Council maintained a broad definition of racial justice. The SIF team then drafted a one-pager to send to prospective track partners interested in the participatory philanthropy pilot.



January 2021

SIF staff developed a budget for the pilot, incorporating funding to pay past Social Innovators for their participation, to share learnings from the pilot, and to account for staff time developing the pilot. SIF staff began holding a series of one-on-one meetings with prospective track partners. They also held a focus group with Social Innovator Alumni to review their application process and consider any changes for the pilot selection process.



February 2021

SIF staff secured four track partners for the first pilot. A significant shift from their traditional roles, track partners would no longer be key decision-makers with the SIF team but rather learners throughout the participatory pilot.



March 2021

SIF began recruitment for a key piece of the new participatory model, “consultants.” The SIF team drafted a job description for future consultants, who were past Social Innovators, advertised the role in their newsletter, and conducted interviews with those who expressed interest. SIF selected six consultants who would be decision-makers throughout the process, including developing criteria for the social issue track description, reviewing applications, selecting the second round and finalist round applicants, attending site visits, and selecting the Social Innovator.



April 2021

The SIF team held an orientation for consultants and track partners.



May 2021

SIF staff facilitated a learning session on the racial justice track topic. During the session, consultants shared their expertise on the topic, while track members and SIF staff were in a learner role. After documenting information shared during the learning session, SIF staff drafted the racial justice track description. The SIF team finalized the description after receiving feedback from consultants.



June 2021

SIF launched its first round of applications for the participatory philanthropy pilot.



July 2021

The first-round application period closed and the SIF team sent applications to consultants and track partners with specific instructions for the upcoming evaluation session. Consultants were to read through the documents and come ready to discuss which applicants should advance while track partners were to read through the documents and make note of questions they had about applicants.



August 2021

SIF staff held the first-round evaluation session attended by consultants, track partners, and SIF staff. Consultants discussed and voted on which applicants to move on to the second round while track partners listened to the consultants' discussion. SIF also conducted mid-way check-ins with consultants and track partners to get feedback on how the pilot was progressing from their perspectives and ask about any desired shifts to the process.



September 2021

Applicants submitted their second round of written applications. The SIF team again sent applications to consultants and track partners to read.



October 2021

SIF staff held the second-round evaluation session, again attended by consultants, track partners, and SIF staff. During this session, the SIF team presented themes from the mid-way check-ins and proposed some adjustments based on those. The most notable adjustment was for funders to participate more actively in the application evaluation conversation, while still reserving decision-making rights for the consultants. Consultants voted

on which applicants would be named finalists and advance to the final round of the evaluation process.



November 2021

SIF staff, consultants, and track partners attended site visits with the finalists before meeting to select the final Innovator. Consultants reviewed the three finalists and came to a consensus decision to select Transformational Prison Project.



January 2022

The SIF team debriefed with consultants and track partners through one-on-one meetings and also collected feedback via a survey.

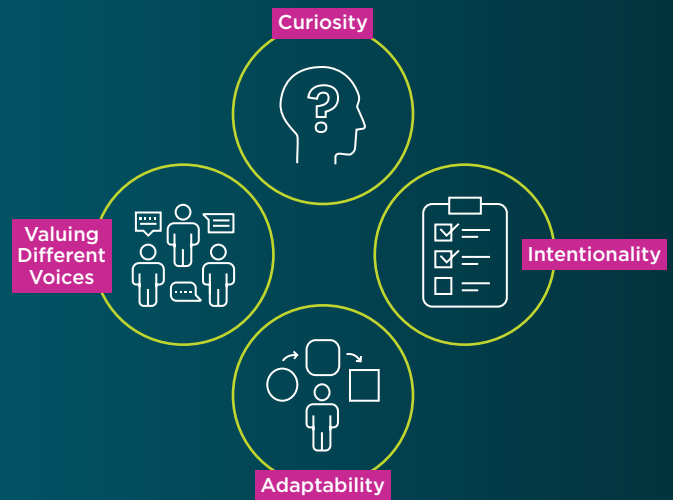


March 2022 - January 2023

After the successful conclusion of the first pilot, SIF launched a second cycle of the participatory pilot in March 2022 with two participatory tracks: (1) Advancing Holistic Education Opportunities for Youth and Young Adults and (2) Equitable Outcomes in the Health and Wellbeing of Communities in the Fall River and New Bedford Areas. The second pilot cycle mirrored the first but implemented feedback that had been collected from consultants and track partners.

Lessons Learned

Interviews with consultants, track partners, and SIF staff who participated in the pilot revealed four foundational elements key to launching their journey into participatory philanthropy: curiosity, intentionality, adaptability, and valuing different voices.



Curiosity

SIF staff began molding the participatory track process by outlining roles for consultants and track partners. Consultants were to share their knowledge of social issues with track partners and the SIF team and make decisions to narrow the applicant pool and select a Social Innovator, while track partners were to learn from consultants and about the track's social issue area and share their learnings with other funders in their network. These roles set the stage for an atmosphere of learning and curiosity.

While SIF staff created space for curiosity to flourish, they also needed open-minded, curious participants. All consultants and track partners proved to be so. When asked about any set expectations interviewees had when entering the participatory process, few were listed. Lily Sargeant, Program Officer for US Partnerships at the Wagner Foundation (2022-23 Track Partner), shared "I knew we'd have a final Innovator and a set number of engagements throughout the process, but beyond that I had very loose expectations."

Marquis Victor, Executive Director of Elevated Thought (Consultant, both cycles), felt the process could be a step towards changing the philanthropic landscape and an opportunity to promote an alternative model. Jim Valone, Advisory Board Member at the Wellington Management Foundation (2022-23 Track Partner), hoped the process would be fair, transparent, and result in the most deserving nonprofit being selected as the Social Innovator. Rather than listing preconceived expectations of the process or fellow participants, interviewees stated they entered the pilot process curious above all.

Consultants and track partners were curious about one another. Sheri Gurock, Executive Director at the Beker Foundation (2021-22 Track Partner), shared that she was curious to observe how consultants approached evaluating and selecting the final Social Innovator and whether the approach would align with her internal process as a funder.

All consultants and track partners stated that they were excited to better understand how their respective areas of expertise would inform how they perceived the applicants. They also wanted to use this understanding to inform their future organizational decisions.

How could reading applications alongside funders give consultants a new perspective to bring to their own application writing? How could track partners apply a nonprofit-informed lens to expand evaluation beyond quantity to quality?

As the organization piloting the participatory track, the SIF team committed to curiosity and continuous learning, which ultimately helped inform changes made to future participatory tracks and the Accelerator selection process more broadly.

Intentionality



During the planning phase of the participatory philanthropy pilot, SIF staff met with consultants and track partners individually. Conversations affirmed consultants' status as sole decision makers and track partners' status as learners. They also provided space for consultants and track partners to ask questions and raise any concerns related to how relationships may unfold during the selection process. Because consultants and track partners were both engaging in roles not traditionally assigned to them in the standard philanthropic model, discussing roles early and often was essential.

At the start of the participatory track, the SIF team also set aside time for trust building. Consultants and track partners were able to meet, introduce themselves, explain why they chose the respective social issue areas, and share personal goals before getting down to business. Jim Valone, a track partner, cited this time as essential to establishing a baseline of trust and rapport that carried through the entire process.

Consultants identified SIF's facilitation as a vital asset during the participatory

track. Marquis Victor, a consultant, noted that SIF's logistics management allowed consultants and track partners to focus on their roles. Ronda Alexander, Director of National Partnerships at Vital Village Networks (Consultant, both cycles), highlighted how SIF staff were intentional in checking in with consultants and track partners about their experience and ensuring everyone felt seen, heard, and welcomed in the space.

During and after concluding each participatory track pilot, SIF staff solicited feedback from consultants and track partners to refine the process. When interviewed, Aditi Dholakia, an SIF employee, shared that "feedback is like gold" at SIF. SIF recognizes its value in pushing the organization and sector forward. However, the SIF team also had to be intentional about what feedback they chose to apply and when. Jenna Nackel, also an SIF employee, stressed the importance of considering staff capacity and being intentional with any changes made.

Adaptability



A core value at SIF is nimbleness. The organization prioritizes its ability to remain flexible and respond to community needs as they evolve. As the participatory philanthropy pilot progressed, the SIF team, consultants, and track partners embodied this core value. The pilot required all involved to pivot quickly and continually adapt the participatory model into one that was more efficient and positively impacted evaluators and applicants alike.

At the start of the pilot, the SIF team reversed traditional roles, repositioning track partners from decision-makers to observers and learners. This dynamic proved awkward and unhelpful to both consultants and track partners. Consultants felt like they were in a fishbowl constantly

questioning what track partners were thinking. Track partners felt they could not fully engage as learners.

During mid-way check-ins with the SIF team, consultants and track partners alike shared they felt it would be more impactful for all parties to actively engage in evaluation discussions, while still reserving decision-making rights for consultants. With participation, funders still had to find their footing. Lily Sargeant, a track partner, discussed the importance of finding a balance between listening to consultants and also sharing pertinent information about her organization and their grantmaking strategy. Jim Valone, a track partner, also discussed learning to be comfortable when track partners and consultants disagreed and moving on when consultants did not select an organization he preferred.

The most significant pivots occurred in the application process. In interviews, all consultants and track partners commented on how unnecessarily extensive they perceived the application process to be. Ronda Alexander, a consultant, felt the process was reductive and focused too much on quantitative metrics. Corinn Williams, Executive Director at Community Economic Development Center New Bedford (2022-23 Consultant), felt the application was intense and could have contributed to the smaller applicant pool seen during the second pilot. After receiving this feedback, SIF staff chose to eliminate the second round of the written application across all social issue tracks moving forward.

In its place, consultants and track partners devoted more attention to site visits. Marquis Victor, a consultant, insisted that the quicker site visits happen, the better. From his perspective, written applications cannot fully capture the identity and work of grassroots nonprofits the way site visits allow. This shift influenced Sheri Gurock,

a track partner, to implement a similar application process at the Beker Foundation. Instead of requiring extensive written materials, the Beker Foundation evaluates prospective grantees through direct meetings, at which applicants can present whatever materials they feel best represent their organization. Since implementation, the Beker Foundation has received positive feedback from both employees and prospective grantees.

Valuing Different Voices



When the SIF team hired nonprofit leaders as decision-makers in their selection process, they created a seat at the philanthropic decision-making table. They also took a step further.

SIF staff prioritized these nonprofit leaders' voices first and shifted the table to revolve around their input instead of funder input.

In this new landscape, consultants, track partners, and SIF staff each brought valuable perspectives to the table.

SIF staff held institutional knowledge of the Accelerator program that consultants needed to effectively evaluate and make decisions on applicants. Consultants had experienced the Accelerator application process as end users, but not as developers.

Input from track partners filled knowledge gaps identified by consultants. Marquis Victor, a consultant, noted that he was typically influenced more by narratives rather than numbers. By sharing their perspective and asking questions, track partners helped consultants create a balanced evaluation that did not reduce

people to numbers, but also did not completely dismiss the story in numbers.

At times, some consultants felt that they wanted more space to explore and amplify their own ideas, and asked SIF staff and track partners to share less.

Consultants held expertise about social issue areas and how grassroots nonprofits approached solutions to these issue areas. The culmination of their experiences as previous applicants, Social Innovators, and nonprofit leaders made them the foremost authority at the table.

Sheri Gurock, a track partner, highlighted key differences between consultant and track partner perspectives. For example, early in the application process, a clear frontrunner emerged on her track. In an effort to be considerate of their time, she suggested eliminating other applicants who were not as strong in the written application.

However, consultants held a different perspective. They knew site visits would allow applicants an opportunity to better showcase their work, especially organizations that “didn’t look as pretty on paper.” They considered how access to other resources through SIF’s broader networks might impact the long-term success of finalists. Their experience enabled them to recognize organizations that were right for the opportunity even if they appeared to be more of a risk. In her words, Sheri thought about how the application process would affect the prospective organizations’ next three weeks while consultants thought about the next three weeks and next three years.

Conclusion

Curiosity, intentionality, adaptability, and the value of all voices emerged as key themes that made the participatory selection process successful from the perspective of the funders, nonprofit consultants, and SIF team members who participated in it. Since the completion of the two-year participatory philanthropy pilot, SIF seeks to integrate at least two participatory selection tracks into the Accelerator each year and continues to iterate on the model.

Each cycle of a participatory track process offers a new set of funders and nonprofit consultants an opportunity to learn together, experiment with new and more equitable practices, and try out ways of being in relationship with each other that provide an alternative to traditional dynamics of power in the sector. Participants can then take their experience and learning with them and apply it in their own work beyond the context of SIF’s selection process.

SIF holds continuous learning as one of the organization’s core values. As the team embarked on this pilot, they leaned into this core value and invited all those involved to do so as well. Sharing the learning, in the form of this paper, with SIF’s community is a way to make this learning visible and to contribute to the broader conversation about participatory philanthropy.

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Jim Valone, Wellington Management Foundation, Track Partner

Marquis Victor, Elevated Thought, Consultant

Community Approaches to Advancing Racial Justice

Ronda Alexander, Vital Village Networks, Consultant

Cherie Craft, Smart from the Start, Consultant

Katherine Gross, The Charlotte Foundation, Track Partner

Bior Guigni, Beat The Streets New England, Consultant

Sheri Gurock, The Beker Foundation, Track Partner

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Suzanne Offit, Track Partner

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