

How Wisconsin Community Fund is making grant allocation more participatory and more efficient

Community activist at WCF Open Space Technology event, April 2010



Key Illuminations:

- 1) Grantmaking can be made more participatory and more efficient at the same time.
- 2) Power sharing is an ever-evolving, dynamic process.
- 3) Fundraising, resource sharing, grant requesting and grantmaking can all happen at one event!
- 4) Letting go of bureaucratic control is a great opportunity for creativity.

The August 2009 grant cycle was the last time the Wisconsin Community Fund (WCF) used a community grantmaking *committee*. Instead, they are transitioning into a short-lived, low-bureaucracy participatory *process*, which repositions WCF closer to the organizations they support. Utilizing Technology of Participation and Open Space Technology methods, they are moving towards larger community involvement in the grantmaking process and maximizing results by leveraging more resources at once.

What is Technology of Participation?⁴

The Technology of Participation (ToP[®]) teaches team members how to collaborate on projects and group facilitators how to effectively lead their team. ToP[®] provides methods that:

- Recognize and honor contributions of all
- Let a group deal with more data in less time
- Pool individual contributions into larger more informative patterns
- Welcome diversity while minimizing polarization and conflict

What is Open Space Technology?

Open Space Technology⁵ was developed by organizational dynamics expert, Harrison Owen, in the 1980s. Owen found that at most of the meetings he attended, the coffee breaks produced the best conversations! So he began developing a method which would literally “open space” for large group collaborations, meetings, retreats or planning events that would have the same kind of spontaneous feeling as a coffee break conversation. “Opening space” is an intentional leadership practice; it highlights common ground among diverse groups of people and encourages cooperation.

The process can accommodate between 5 and 2,000 people in time frames ranging from weekly staff meetings to 3-day events, making it an ideal, flexible model for organizations that need to work with a large number of stakeholders. Each Open Space event focuses on a specific task or theme, but begins without any pre-conceived formal agenda. Open Space Technology works best when a complex issue has arisen, such that no single person or small group fully understands or can solve the issue and when a high level of diversity in skills and people are required for a successful resolution to be found.

Harrison Owen developed four principles that are usually explained during the opening of an Open Space meeting:

- 1) “Whoever comes is the right people” reminds participants that you don’t need the CEO to get something done, you need people who care.
- 2) “Whenever it starts is the right time” reminds participants that “spirit and creativity do not run on the clock.”
- 3) “Whatever happens is the only thing that could have” reminds participants that once something has happened, it’s done and no amount of fretting or rehashing can change that.
- 4) “When it’s over, it’s over” reminds participants that we never know how long it will take to resolve an issue, but that whenever the work or conversation is finished, move on to the next thing. Do the work, not the time.

Owen has also developed the Law of Two Feet, which states *If at any time during our time together you find yourself in any situation where you are neither learning nor contributing, use your two feet, go someplace else.* All participants are given both the right and the responsibility to maximize their own learning and contribution.⁶

Bridging divides by opening space

WCF had been dealing with an historic power struggle between board members and the grant allocation committee for years. A deep divide existed between the core activists who did the site visits and the board who questioned their decisions. Each side resented the other and key people had left the organization due to the tension. One thing that everyone agreed on was that they wanted to start fresh and move on. They just weren't sure how to do it.

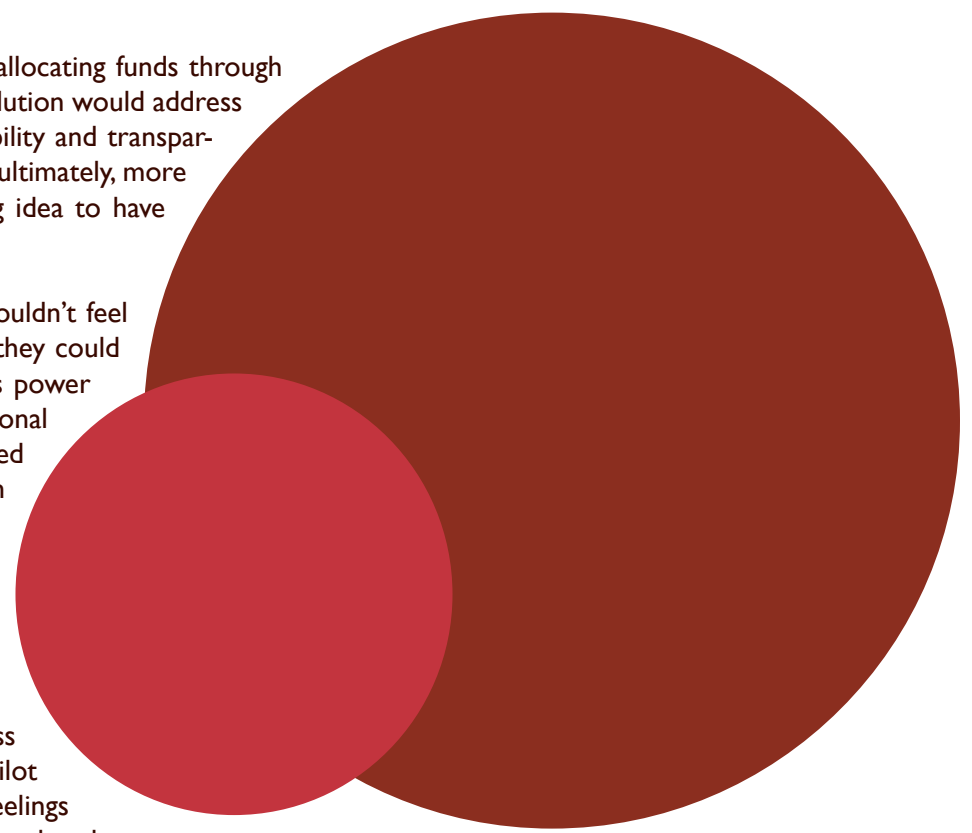
When Jeff Streier, WCF Program Coordinator, brought up the possibility of allocating funds through an Open Space Technology event, the staff immediately recognized that this solution would address everything they wanted out of their grant cycle: building solidarity, accountability and transparency, less competition between grantees, more collaboration for funding and ultimately, more effective social justice movements. It also seemed like a fantastic fundraising idea to have donors more directly involved.

However, there was a significant concern that marginalized constituencies wouldn't feel empowered to take the lead in self-organized groups. The board did all that they could to ensure that people from diverse communities were there and to address power dynamics. In the end, the board approved the idea mainly because the traditional grantmaking process wasn't exactly as participatory as they would have liked either; uncomfortable power dynamics were already present in the organization and everyone was ready for change. Figuring that no solution would be perfect, the WCF community took a chance with Open Space.

Piloting new frontiers in grantmaking

A lot of groups use Open Space Technology for planning and strategizing, but only one other organization had used it for grantmaking: the Motherload Foundation. WCF got some great advice from Motherload, but the planning process was still characterized by nervousness and anticipation leading up to the pilot event. Cindy Fesemyer, Chief Development Officer at WCF, summarized her feelings about planning: "The hardest part in the planning process is that you have to trust that the right people are there and the right decisions will come out of the group. I'm nervous about it because the typical grantees aren't jumping in to participate. It's hard to plan for something when you have no idea of what the result will be" (personal communication, March 16, 2010).

The three planning phases included a Community Input Phase, Design Phase (the Design Team included Jeff, Cindy, and 3 trained facilitators), and the one-day Community Grantmaking event. The Community Grantmaking event would not start with a pre-arranged agenda, but rather, with a theme. The theme was comprised of the following questions:



What are you passionate about to create social justice and strong equitable communities in WI?
 What are you willing to take responsibility for?
 What other community assets and opportunities do you have and how could you share that?
 How should we allocate at least \$5,000?
 Should the US Social Forum be prioritized in how we allocate this money?

These questions were clearly indicated on the invitations to potential participants. The Design Team invited anyone who had gotten a grant or a site visit in the last 3 years, donors who they thought would be interested, all of the board, and a few new groups in the area. All in all, 70-75 people were invited and about 1/3 of the invitees came.

On April 10, 2010, WCF piloted their Community Grantmaking event with a group of 23 board members, staff, donors, potential grantees and activists. In one day, these participants created grant proposals on the spot, raised an additional \$3,000 in response to a matching challenge from a major donor during the day and decided on grant allocations of that \$10,000! Two-thirds of the participants in the room were activists and each group walked away with a grant.

Finding opportunity in chaos

Three topics came out of the Breakout proposal session. *Breakout One*, included a facilitator, a board member, a staff member and only one group that came seeking a grant. This group had been organizing against factory farms in their county; but as a result of the discussion, they decided

to take their activism to a state level. This group was made up of working class farmers trying to preserve their way of life, but the Open Space collaboration process gave them a space and an opportunity to think bigger.

Breakout Two was comprised of three organizations with similar interests who never had a chance to sit down and think about how to work together. As a result of their conversation, they actually formed a new coalition right on the spot and ended up requesting one grant to be split three ways for collective work.

Breakout Three was made of three groups who are more support-oriented rather than direct action or organizing-oriented. They proposed three separate grant applications when reporting back to the larger group. However, the grants they proposed included the collaborative spirit of their breakout session. For example, one group asked for a grant to pay for their organizers to go to another group's training.

Each of the groups had to submit a formal one-page grant proposal with 7 questions, which they filled out AFTER the grant allocations had been decided!

One unique part of the day was the inclusion of a "Community Asset Bank" (posted on the wall). Participants could add expertise or services to the bank throughout the day, such as program development or lending out vans. These non-financial items helped groups save money that might normally come from WCF grants.

Open Space Community Grantmaking schedule

9:30-10:00	Coffee/sign in
10:00-11:00	Introduction/overview of day
11:00-11:30	Participants propose Breakout topics
11:30-1:00	Breakout sessions
1:00-2:30	Breakout group report back to the larger group on key themes, and requested assets, plus Q&A
2:30-3:30	Decisions are made for grant allocations
3:30-4:30	Closing circle

In addition, they doubled the available grant funding during the process! The WCF Board had previously voted to start the “Cash Bank” (also posted on the wall) at \$5,000. Then, Cindy raised \$2,000 more from a donor a few days before the event. Finally, during the day, one of the donors in attendance put up a matching grant challenge in order to raise \$3,000 more. Every participant gave something and they ended up with \$10,000 to give away by the end of the process.

After the Breakout groups reported back to the larger group, the total requested funding came out to almost \$18,000; so, the group had to cut that amount down to \$10,000 together. This was a challenging and tense moment in the day. One of the Design Team members suggested everyone cutting an equal percentage out of their own proposals, but the participants pushed back on that egalitarian idea. Honest conversation ensued between grassroots organizations, mainly comprised of people of color, and support organizations, which were white in majority; people had strong opinions about funding priorities. Facilitation was very minimal during this time, but in the end, the group decided to cut everyone’s proposal by a little bit, but to cut the support organizations’ requests by a larger percentage than the others.

“If we had a more structured decision-making process in place it would have been a more constructive conversation because some of the opinions were expressed in a way that some folks felt was destructive. On the other hand, a higher level of facilitation may have prevented the true differences in opinion from being expressed at all, even in what might be called a harsh manner, and I wonder if that’s an injustice in the long run” (J. Streier, personal communication, April 23, 2010).

“If we’re truly supporting the people we say we are—grassroots activists, community organizers, organizations who are new, controversial and small—then the fact is that they are going to be doing the work whether there is money or not. If my job is to support them, this participatory process is a better way to do it than having them submit a RFP – even to an activist-led committee. There’s still a level of hierarchy in activist-led grantmaking committees that doesn’t allow for as much participation from as many people as we saw in the Open Space process: participation in raising funds, decision-making, sharing information, collaboration, and setting priorities. And that’s how I see myself ensuring that I do my job better. This participatory process means better support for our grantees and for the larger movement.” Jeff Streier

One anonymous participant noted, “I was surprised by how much I liked the process. It brings up challenging yet honest conversation which helps move

us to a much more effective collective decision regarding funding priorities.”

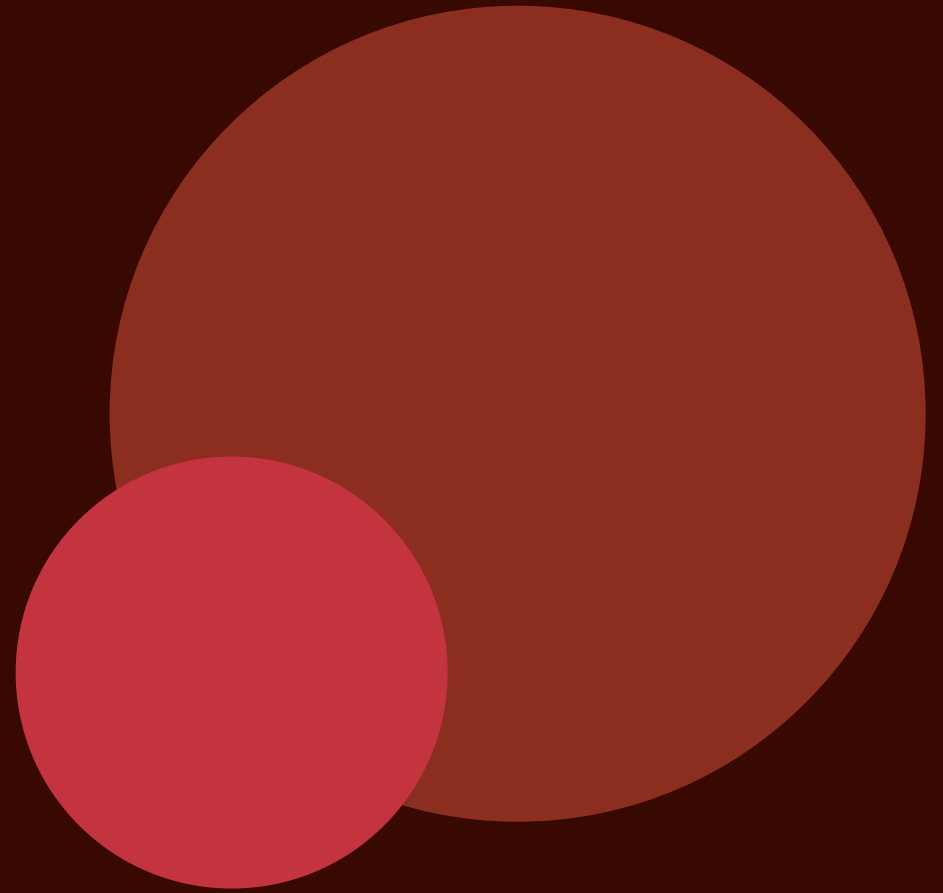
Cost

WCF budgeted \$5,000 for grants + \$2,000 for materials, travel stipends and three facilitators. Volunteer labor significantly lowered the cost. Staff time spent on research and development was large, since it was the pilot, and they still have more research and development to do on it.

Moving forward

Three stages of evaluation included the closing circle at the event, the Design Team debriefing, and a written follow-up survey of all participants. WCF’s main performance indicator was the survey question, “How likely is it that you would recommend community grantmaking to a friend or colleague?” On a scale of 1-10, 55.5% answered extremely likely (9 or 10), 39% answered that they were passively satisfied (7 or 8), and only 5.5% was unlikely to recommend (0-6). All evaluation was summarized and discussed at a following board meeting. *After discussing the evaluations, the board approved all grant recommendations and also endorsed pursuing the program again in the next fiscal year!*

There was a lot of negotiation over the grant amounts, but all the other benefits grantees came away with—collaboration, asset exchange, creativity, and information exchange—were things they probably would not have found on their own. People who have never been involved in grantmaking realized how hard it is. Others, who may not have seen themselves as donors had the chance to donate in a collaborative way. Everyone there had the opportunity to be grant-seekers, grant-makers, and donors all in one day!



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