HEALING WORK
AN ACTION GUIDE TO EQUITABLE GRANTMAKING SUPPORTING YOUTH OF COLOR
Why Equitable Grantmaking Matters

Every day, children and youth of color experience the sting of racism. The media portrays them in ways that deny their humanity, they experience harmful microagressions and full-on assaults on their humanity in school, and they bear witness to the indignities of systemic racism in their communities and in their lives in myriad ways. The intergenerational weight of this oppression is heavily felt as their parents and caregivers watch their children endure the same atrocities that were barriers to their own thriving from childhood.

Racism traumatizes people. The dehumanization of people of color has deeply wounded the bodies and minds of generations of people. Research shows that youth of color exposed to discrimination have poor sleep habits, higher levels of stress hormones, and higher levels of obesity. Additionally, these youth also have higher levels of depression and suicide, and display symptoms of post-traumatic stress disorder. The effects of racism follow them throughout their lives and manifests as hypertension, heart disease, and other chronic illnesses in adulthood.

Research on trauma and adversity has become part of the discourse on youth development and has been widely adopted by funders as a lens through which to view investments to positively impact families. Despite strong evidence that racism and colonialism have clear traumatic impacts, the concept of racialized trauma is largely absent from discussions about trauma and adversity. Far greater attention is being paid to individually focused trauma than the systems that enact racial trauma on families of color. Funders focus on family poverty, child welfare, hunger, and interpersonal violence—without acknowledging that these issues were created by generations of racist policies and practices. The focus on individual childhood traumas leaves no room to discuss the overarching oppression of racism and dehumanization that collectively impacts people of color. We must acknowledge racialized trauma as a component of the trauma work that must be done to enable children of color and their families to heal, grow, and thrive.

Attention to racism as a real factor in the lives of children, youth, and families of color is critical to making change. The ability for youth development organizations to effectively support healing from racism as a part of their programming is critical to the success, health, and well-being of children and youth of color. Moreover, it is crucial for media organizations to disrupt negative narratives and speak the truth about people of color. And, it is essential that community organizers and policy advocates elevate the structural and implicit biases that impede progress of people of color.
The Expertise of the Healers Matters

Organizations built and led by people of color are best positioned to address the healing of people of color and the communities where they live. These organizations are led by individuals who intimately understand issues of racism, colonization, and dehumanization. They are most effective at implementing culturally responsive approaches to racial trauma in their youth programming, leading with authentic, asset-framed narratives of the lived experiences of those in communities, and mobilizing youth and others to be change agents and advocates.

The unfortunate truth is that these organizations are less likely to be funded by philanthropy despite their deep knowledge and expertise in tackling the issues caused by racialized trauma. Equitable grantmaking must start with a belief that people within communities of color are the most capable of generating and directing the solutions for their own healing. Secondly, funders must believe that the models that are lifted up as “credible” are not the only models that exist, and that culturally responsive models of this work have equal value. It is vital that philanthropies do the work to understand culturally relevant and healing centered work, rooted in cultural history and pedagogy, as an effective solution to addressing racialized trauma and systemic oppression. Without this understanding, it will be difficult for organizations to describe their work in ways that resonate with foundations and their reviewers. Finally, funders must be willing to interrogate their own implicit biases that often make them less trusting of organizations led by people of color, resulting in immense roadblocks or requirements attached to dollars.
What Funders Can Do

There is significant disparity in the proportion of philanthropic dollars that go to organizations run by people of color and they are far less likely to receive funding through traditional processes, even for initiatives and projects that focus on communities of color. POC-led organizations are often younger, have smaller budgets, and have leaner staff. They are less likely than white-led organizations to have full-time development or grant writing staff. These organizations face major barriers in fundraising, such as lacking funder relationships and strong social networks, being expected to educate potential funders about their issues, the undervaluing of their work, and continually having to prove themselves in ways that white-led organizations do not. These barriers makes POC-led organizations more vulnerable, especially during times of economic downturn or crisis when many foundations fund less while organizations need more.

Equitable grantmaking can only happen with an overt commitment to stop replicating the deep and documented history of racial disparity in funding. To rectify the silencing of communities of color in their own healing, philanthropy must be intentional about implementing an effective set of equitable practices which allows them to hold space for, learn from, and better support the communities they wish to serve.

To begin, funders must be more transparent about the proportion of POC-led organizations in their portfolios and their goals in this regard. Equitable grantmaking will require that philanthropies continually interrogate their funding practices to ensure alignment with their goals. They must also prioritize seeking out organizations created and run by people of color as part of their grantmaking focus. They must then put a strategy in place which demonstrates that commitment at every step of the grantmaking process, from the formulation of calls for proposals through the final selection process. In so doing, philanthropies can identify and partner with passionate, high-quality grantee organizations that would ordinarily face significant barriers navigating the hoops established by traditional grantmaking processes.

In the last three years, Forward Promise has learned from our grantmaking processes and developed an intentional equity approach that provides well-qualified leaders and programs the opportunity to share their knowledge about effective, culturally responsive healing practices. Without this intentionality, our grantmaking, technical assistance, and leadership development efforts would uphold the same systemic inequities and marginalization we wish to eradicate. Forward Promise has identified six points of opportunities in the grantmaking process where funders can use more equitable approaches to improve the quality of their grantmaking and yield more diverse grantees:

1. Call for Proposals
2. Dissemination of Proposal Announcement
3. Reviewer Pool
4. Review Process
5. Data Gathering and Analysis
6. Site Visits

By adopting the effective practices outlined in this action guide, philanthropy can better serve its mission in communities of color by ending the marginalization of organizations built and run by people of color.
Problem:

The language used in calls for proposals is extremely important. If the language in a call for proposals does not also use language that signals to organizations that there is a basic alignment between their approach and the funder’s direction and desired outcomes, organizations will not even try to apply. Calls for proposals that do not explicitly name a commitment to equity, combatting racialized outcomes, or an interest in people of color may be inadvertently turning away the very organizations that the funder seeks. External grant reviewers used by the foundation also may score proposals quite differently if the call for proposals does not explicitly name these priorities. If funders are serious about supporting work in communities of color with organizations run by people of color, their calls for proposals should be framed to clearly reflect that.

Effective Practices:

1. Before beginning to draft a call for proposals, it is important to discuss and fully understand the problem that you hope to solve and the way that problem specifically manifests for people of color. Think about the types of approaches to solving the problem that your foundation wants to support, and learn about how these approaches work in multiple types of communities. Consider that approaches to this problem differ by culture. Do not assume that they will look the same—or even remotely similar—in communities of color. Work to ensure that the breadth of the problem and potential approaches is reflected in the call for proposals document.

2. After drafting a call for proposals, engage others to undergo a critical review process. Identify a small group of partners willing to read and provide feedback on the draft. Reviewers should have a clear understanding of the problem you hope to solve, how it impacts people of color, and approaches you seek to fund to solve this problem. Their goal should be to assess whether it is clear from your language that you are striving to attract a diverse pool and, ultimately, select a diverse group of organizations to fund.

3. Use the feedback from reviewers to amend the call for proposals. This feedback loop is designed to make the call for proposals stronger. Though time is potentially added to the process, the feedback loop helps to ensure that a larger, more diverse group of organizations will see their work as relevant to the call for proposals and consider applying.
Lessons Learned:
Forward Promise came to understand that organizations working with boys and young men of color of different racial/ethnic groups use varying language to describe their work. When some of those terms do not appear in a call for proposals, organizations think that they may be ineligible or have only a slim chance of selection. For example, use of the word “racism” is not sufficiently inclusive because it is not a term used by Native Americans to describe their experience. Also including terms like “colonization” and “dehumanization” in the narrative offers more clarity to the organization that their issues and approach are welcomed in the applicant pool. We use a subset of our external grant proposal reviewers to review our calls for proposals and suggest edits that make the document more inclusive.

Questions to Consider:
- What problem do we hope to solve with these resources?
- How does this problem uniquely manifest in communities of color?
- What approaches do we really hope to fund to solve this problem?
- Do these approaches include the work of organizations led by people of color?
- What kinds of organizations solve this problem?
- How do those organizations talk about their approach to solving the problem?
- How does their language align with the language or philosophy of the foundation?
Problem:

Funders often lament the insufficient diversity in their applicant pools which makes it impossible to have more diversity in their investment portfolio. Conversely, many organizations led by people of color share that they either do not know about funding opportunities or find out about them too late. Their social networks in philanthropy are not robust. Funders must develop an intentional outreach strategy focused on organizations led by people of color. Allowing people to sign up for an email list for funding opportunities is insufficient. Targeted outreach is necessary to proactively improve the diversity of the applicant pool.

Effective Practices:

Establish formal partnerships with the communications officers in funder affinity groups and national or regional member-based organizations working on behalf of racial and ethnic groups. These leaders can share calls for proposals with their networks.

1. Enlist partner organizations to share proposal information with their member lists via email. Develop standard email templates for their use to facilitate sharing.

2. Develop a coordinated social media strategy with partners. Create a social media toolkit for them with instructions for sharing information widely.

3. Host webinars in partnership with national member-based organizations and funder affinity groups for their members. Ensure these are conducted early in the application process to share information about the proposal and answer questions.

4. Gather data about the dissemination process. Request data on the number of individuals who received targeted emails and participated in co-sponsored webinars. Include an application question to determine the number of applicants who were encouraged to submit applications because of these forms of outreach. Ask questions about staff and board composition to identify organizations primarily run by people of color.
Lessons Learned:
Forward Promise learned that outreach and partnership made a significant difference in the diversity of applicant pool. Since African American and Latino organizations are generally prevalent in the applicant pool for funds to organizations working with people of color, we knew that we would have to target outreach to Native and Asian/Pacific Islander communities. And, understanding that fewer dollars typically go to organizations located in Southern communities, we also focused our efforts there to yield more applications.

For each grant cycle, we used the practices described and received a number of Asian/Pacific Islander and Native American applicants from across the country. We also received a significant number of applications from Southern organizations. While we did not rank these applicants any differently in the review process, their presence in the pool provided us an opportunity achieve a stated goal of our grantmaking—to select quality organizations that reflect regional and racial diversity. Without these efforts, it is much less likely that these high-quality organizations would be present in our pool of applicants.

Questions to Consider:
- Which populations do we seek to prioritize that are currently underserved in our foundation’s grantmaking?
- What organizations are currently actively engaged with this population?
- How can we partner on outreach?
- How can we measure the impact of this additional outreach?
STEP 3: Establish Diverse Reviewer Pool

Problem:
One of the biggest barriers in the grant process is that the pool of decision makers often lacks diversity. Funding decisions made without a deep knowledge of the population and issues they face (beyond professional and theoretical experience) often lack the nuance needed to see beneath the layers of proposals to identify strengths and potential weaknesses. Before beginning grant reviews, it is important to identify the skills, perspectives, and diverse backgrounds you need from your reviewers. Then assess how well the diversity and capabilities of your current cadre of reviewers meets those needs. Reviewers from other programmatic areas, or external reviewers, may be used to add depth to your reviewer pool.

Effective Practices:
In the same way that culturally responsive programming is defined as springing from the wisdom of the populations served, equitable grantmaking prioritizes the perspectives of those closest to the impacted community.

1. Be clear about who you want to fund:
   - Are there particular sectors that your calls for proposals are designed to fund?
   - Are there particular regions of the country that your foundation is focused on?
   - What racial or ethnic groups are a priority for this work?

2. To ensure diversity of thoughts and opinions, look to balance the group of reviewers by considering the following:
   - Racial/ethnic diversity
   - Geographic spread
   - Expertise in the key sectors targeted in the proposal, i.e. business, communications, nonprofit leadership, child and youth development, physical and mental health, community organizing, workforce development, education, research, etc.
   - Demonstrated commitment to racial equity, as evidenced in their professional work through writings, presentations, or other forms of engagement.

3. Recruiting reviewers may require that a foundation looks beyond its existing personal relationships. To build a representative cadre of thought leaders to review proposals, consider some of the following strategies:
   - Seek advisement from organizations doing culturally responsive work with youth, as well as colleagues working in foundations with a similar desire to fund work focused on people of color.
   - Conduct searches of the recent scholarly writings on your areas of interest to identify strong potential partners.
   - Search the internet using relevant terms to identify leaders in the field in various parts of the country.
   - Review the boards of highly respected organizations centered on people of color.
Lessons Learned:
At the beginning of its national program, Forward Promise identified an expert group of advisors to help us with grantmaking. The diversity of our advisory group has been key to our success in being attentive to issues of equity. Our advisors are reflective of the communities, racial/ethnic groups, issue areas, and age that we prioritize in grantmaking. This group of advisors helps us to shape our calls for proposals by sharing their input on goals, strategy, and language. They also review grant proposals in their areas of expertise. On site visits, they ask thoughtful, probing questions to help them to understand the nuances of each organization’s work.

Questions to Consider:
• What kinds of organizations are we seeking to fund?
• Are there particular sectors that our call for proposals is designed to fund?
• Are there particular regions of the country that our foundation is focused on?
• What racial or ethnic groups are a priority for this work?
• Does our pool of reviewers reflect the sectors, geographic regions, and racial/ethnic diversity that we are seeking?
• What recruitment strategies will be used to research and identify potential reviewers?
• Which foundation staff member or team will be responsible for implementing these strategies?
Problem:

Unconscious bias about people of color is a significant barrier in grantmaking, particularly because philanthropy is largely led by affluent white individuals. These biases are compounded by the subjectivity of the grant application review process. Many organizations use mechanisms such as multiple reviewers and aggregate scoring to reduce subjectivity. It is critical that grantmakers provide parameters for reviewers that identify biases that could enter the review process and solutions to reduce them. Despite these measures, the chances for selection are still skewed against POC-led organizations, especially if the pool of reviewers is not diverse.

Effective Practices:

1. Recognize that English may not be the applicant’s primary language. As reviewers screen proposals, do not create an unnecessary barrier for applicants by automatically deducting points for grammar or spelling.

2. Acknowledge that the work of professional grant writers often shines brightly in review processes because they are skilled at following the exact template, researching the buzz words and priorities of the foundation, and strategically infusing that language into the proposal. Many POC-led organizations do not have the capacity to employ a full-time grant writer or development director on their team. Ask reviewers to dig deeper into proposals to discover how applicants approach their work.

3. Do not disqualify applications based on small technicalities. Often, when foundations get many proposals, applications may be disqualified based on technicalities to narrow the pool for reviewers. It is very likely that POC-led organizations are over-represented in this pool of disqualified applicants.

4. Consider including a video component into the application for individuals who express themselves better verbally than in written form.

5. Gather data on the number and percentage of applications from POC-led organizations that are started, submitted, and reviewed. Determine if a disproportionate number are disqualified and if your applicant pool, at each stage of review process, contains the representation that you aspire to have in your funding portfolio.
Questions to Consider:

- Has the foundation developed written guidelines for equitable grant review? What types of barriers have we committed to removing for potential applicants?
- How will we accommodate POC-led organizations that don’t have the benefit of full-time grant writing or development staff?
- How will we share equitable application scoring procedures with reviewers?
- Do we have capacity to accept video components to applications? Are there other ways we can solicit detailed information from applicants?

Lessons Learned:

To level the playing field for applicant organizations, Forward Promise provided its reviewers with criteria aimed at improving equity in scoring the applications. We then conducted a webinar to introduce reviewers to the parameters and made a recording of the training available for those who wanted it for reference during the review period.

During grant review, we gathered data at every step of the process. And, at the end of each phase, we counted how many POC-led organizations were either moved to the next phase or disqualified. When large numbers of POC-led organizations were disqualified, we created space for discussions with reviewers about the applications to ensure the scoring was appropriately balanced. In some cases, the decision remained the same. In others, qualified organizations were put back into the pool of potential grantees and moved to the next phase.
STEP 5: Gather & Analyze Data

**Problem:**
Funders often state desire for, and commitment to, equitable grantmaking without quantitative goals for identifying success. Collecting data and strategically assessing the applicant pool at each step in the grantmaking process is critical to determining progress toward equity goals and identifying the areas of the grantmaking process that may require adjustments.

**Effective Practices:**
Collect and discuss data at seven critical points in the application process:

1. During the open application period
2. At the close of the application period
3. After initial application screening
4. After application review
5. After selection of finalists for site visits
6. After site visits
7. Before final submission of organizations recommended for funding

This data should serve as an internal audit investigating how well the organization’s values are aligned with their funding decisions, and what measures can be taken to continuously remove barriers to success from the selection process.

After each step, funders should look at the data and to analyze the story it tells about the grantmaking process. Mining this data allows funders to be more aware of the points where bias may show up in the process, and to potentially do some course correction. Waiting until the process is complete to look back is likely too late.
Lessons Learned:
Forward Promise determined the type of work we wanted in our funding portfolio and set internal targets for how many applications we would like to receive from POC-led organizations that carry out that work. We included questions on the application to ascertain the breakdown of the racial/ethnic population(s) the applicant primarily serves. Aggregating the data, we determined whether applications submitted by POC-led organizations which focus on particular populations are being disproportionately removed from the applicant pool—and at which point removal occurs.

Questions to Consider:
- What is our goal for the number of proposals we would like to receive?
- What is our goal for the number of POC-led organizations that we seek to fund?
- How can we track our progress toward our goals during the grantmaking process?
- What can we do during this grantmaking process if we are not meeting our goals?
- What lessons can we learn to improve our next grantmaking process?
STEP 6: Conduct Inclusive Site Visits

Problem:
Many foundations use site visits as a final step in the grant application process. The visit is designed to allow reviewers to interact with the applicant in ways that add context and human connection to the written application. It is also an opportunity for the funder to ask any questions about the application and perhaps to see their work in action. Many POC-led organizations complain that site visits feel, at best, like a “dog and pony show” and, at worst, like an exploitative process where they must parade the pain of people of color. Approaching site visits with a spirit of humility and learning is key to engaging well and creating lasting relationships with organizations.

Effective Practices:

1. Identify which application reviewers are most familiar with the social and political landscape in communities where finalist organizations are located. Be intentional about scheduling reviewers with that knowledge for site visits in those communities.

2. Allow organizations to take the lead on the agenda for the site visit. Provide guidelines and basic components, but allow them to create an experience that they believe represents the essence of their organization.

3. Ask organizations if there are cultural or spiritual norms that need to be observed, or if any particular practices will be a part of the site visit. Ensure that both the visiting reviewers and the organizational staff are comfortable.

4. Provide ample lead time for site visit scheduling and be mindful of any cultural holidays or remembrances.

5. Be as transparent as possible with organizations about the purpose of the visit, their chances for funding, and the timeline for decisions. Answering their questions fully helps to engender trust.
Lessons Learned:
Site visits are often tense and intimidating for grantees, which circumvents the mutual exchange of knowledge. For this reason, Forward Promise chose to approach its site visits as communal learning opportunities. Whenever possible, we matched sites to reviewers who were familiar with the social and/or political landscape in the communities so reviewers could ask relevant questions about the local context in which the grantee operates. Rather than following our prescribed agenda, we allowed applicants to exercise greater leadership over the site visit by asking them to craft an agenda that included some required elements. Before site visits, we asked applicants to share cultural norms that we ought to be mindful of and how to respectfully visit with their organizations and communities. This approach created a comfort level that encouraged applicants to more authentically share how the organization functions and its strengths in the community. Applicants were also more transparent about areas where they would value technical assistance or support. The intentionality we built into our site visits often led to invitations to participate in meaningful cultural experiences during our time with the organization. This deepened our understanding of their work and fostered positive relationships when they became grantees.

Questions to Consider:
- Which of our reviewers are familiar with the social and political landscape in communities where finalist organizations are located?
- In what ways can we support and encourage organizations to take the lead on the agenda for the site visit?
- Which cultural or spiritual norms may need to be observed during the site visit?
The language used in calls for proposals is extremely important. Calls for proposals that do not explicitly name a commitment to equity, combatting racialized outcomes, or an interest in people of color may be inadvertently turning away the very organizations that the funder seeks. If funders are serious about supporting work in communities of color with organizations run by people of color, their calls for proposals should be framed to clearly reflect that.

Use these questions to guide your thinking and writing process:

Before drafting calls for proposals

What problem do we hope to solve with these resources?

How does this problem uniquely manifest in communities of color?

What approaches do we really hope to fund to solve this problem?

Do these approaches include the work of organizations led by people of color?

What kinds of organizations solve this problem?

How do those organizations talk about their approach to solving the problem?

How does their language align with the language or philosophy of the foundation?
Reviewing draft calls for proposals

Is the problem to be solved clear?

Is the language inviting?

Does the language include key words that resonate with and/or reflect the ways communities of color frame their work to solve this problem?

Is it explicitly stated that organizations using cultural approaches are welcome to apply?

Do the stated requirements for “research-based” or “proven strategies” inadvertently eliminate innovative programs from applying?

Is there anything that raises a red flag for the reviewer in the call for proposals?

What edits should be made to ensure that a larger, more diverse group of organizations will see their work as relevant to the call for proposals and consider applying?
Funders often lament the insufficient diversity in their applicant pools which makes it impossible to have more diversity in their investment portfolio. Conversely, many organizations led by people of color share that they either do not know about funding opportunities or find out about them too late. Their social networks in philanthropy are not robust. Funders must develop an intentional outreach strategy focused on organizations led by people of color. Targeted outreach is necessary to proactively improve the diversity of the applicant pool. Partnering with organizations that work with underrepresented populations is a good way to increase your reach.

Use these questions to develop a plan for dissemination with partners:

Which populations do we seek to prioritize that are currently underserved in our foundation’s grantmaking?

What organizations are currently actively engaged with this population?

How can we partner on outreach?

Who will lead this effort in our organization?

How can we measure the impact of this additional outreach?
One of the biggest barriers in the grant process is that the pool of decision makers often lack diversity. Far too often, the decision makers are individuals with little or no lived experience related to the issues being elevated by the funding announcement. Or, they have very little experience with the communities of color where the issues are most prevalent. Therefore, the funding decisions from these reviewers lack in-depth understanding of the issues and the population beyond professional and theoretical experience. A deep knowledge of the issues lends itself to the nuance needed to see beneath the layers of proposals to identify strengths and potential weaknesses.

Use these questions to develop a plan for establishing a more diverse reviewer pool:

**Aligning the call for proposals with the reviewer group**

What kinds of organizations do we seek to fund?

Are there particular sectors that our call for proposals is designed to fund?

Are there particular regions of the country that our foundation is focused on?

What racial or ethnic groups are a priority for this work?

Does our pool of reviewers reflect the sectors, geographic regions, and racial/ethnic diversity that we are seeking?
Recruitment Strategies

What recruitment strategies will be used to research and identify potential reviewers?

Which foundation staff member or team will be responsible for implementing these strategies?

Chart for Potential Reviewers

After identifying priority sector(s), audience(s), and geographic area(s), use the following chart to generate a list of potential reviewers and assess how well their background and knowledge aligns with the foundation’s goals and priorities. Track acceptance of the invitation and review for balance in the overall group. Determine if additional outreach is needed. Copy this chart if additional columns are needed.
<table>
<thead>
<tr>
<th>Knowledge Area &amp; Unique Strengths</th>
<th>Name/Organization</th>
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<tr>
<td>Demonstrated Commitment to Racial Equity</td>
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<td>Expertise in Priority Sector A</td>
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<td>Expertise in Priority Sector B</td>
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<td>Expertise in Priority Sector C</td>
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<td>Knowledge of Audience A</td>
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<td>Knowledge of Geographic Area C</td>
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<td>Outreach Made</td>
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<td>Acceptance of Invitation to Review</td>
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Unconscious bias about people of color is a significant barrier in grantmaking, particularly because philanthropy is largely led by affluent white individuals. These biases are compounded by the subjectivity of the grant application review process. Many organizations use mechanisms such as multiple reviewers and aggregate scoring to reduce subjectivity. It is critical to grantmakers provide parameters for reviewers that identify biases that could enter the review process and solutions to reduce them. Despite these measures, the chances for selection are still skewed against POC-led organizations, especially if the pool of reviewers is not diverse.

Use these questions to help create a fairer application review process:

Has the foundation developed written guidelines for equitable grant review?

What types of barriers have we committed to removing for potential applicants?

How will we share equitable application scoring procedures with reviewers?

Do we have capacity to accept video components to applications?

Are there other ways we can solicit detailed information from applicants?
Funders often state desire for, and commitment to, equitable grantmaking without quantitative goals for identifying success. Collecting data and strategically assessing the applicant pool at each step in the grantmaking process is critical to determining progress toward equity goals and identifying the areas of the grantmaking process that may require adjustments.

WORKSHEET 5
Gathering and Analyzing Data

INTEREST IN CALL FOR PROPOSALS
APPLICATIONS STARTED
APPLICATIONS SUBMITTED
APPLICATIONS PASSED INITIAL SCREENING
APPLICATIONS REVIEWED
APPLICATIONS SELECTED AS FINALISTS
APPLICANTS VISITED
SELECTED FOR FUNDING
Use these questions to create a process for gathering and analyzing data:

What is our goal for the number of proposals we would like to receive?

What is our goal for the number of POC-led organizations that we seek to fund?

How can we track our progress toward our goals during the grantmaking process?

**During the open application period**
- How many organizations attended events to promote the call for proposals (conference calls, webinars, Twitter chats, FB Live events) or reached out for additional information?

**At the close of the application period**
- How many completed applications were submitted? How many of these are POC-led organizations?

- How many applications were started but not finished? How many of these are POC-led organizations? What reason do they cite for failure to complete the application?

**After initial application screening**
- How many applications were disqualified during screening? How many of them are POC-led organizations?
After application review
• What proportion of applications have very high, medium, and low scores?

• What proportion of these applications in each category are POC-led organizations?

• What can we do during this grantmaking process if we are not meeting our goals?

During selection of finalists for site visits
• Do these applicants reflect the diversity that the foundation is seeking in its grant portfolio? Why or why not?

After site visits
• What proportion of applications have very high, medium, and low scores? What proportion of these applications in each category are POC-led organizations?

Before final submission of recommended organizations for funding
• Does this pool of grantees reflect the foundation’s stated commitment to equity? Why or why not?

What lessons can we learn to improve our next grantmaking process?
Many foundations use site visits as a final step in the grant application process. The visit is designed to allow reviewers to interact with the applicant in ways that add context and human connection to the written application. It is also an opportunity for the funder to ask any questions about the application, and perhaps to see their work in action. Many POC-led organizations complain that site visits feel, at best, like a “dog and pony show” and, at worst, like an exploitative process where they must parade the pain of people of color. Approaching site visits with a spirit of humility and learning is key to engaging well and creating lasting relationships with organizations.

**Use these questions to think about the site visit process:**

Which of our reviewers are familiar with the social and political landscape in communities where finalist organizations are located?

In what ways can we support or encourage organizations to take the lead on the agenda for the site visit?

Which cultural or spiritual norms may need to be observed during the site visit?