



Letting Go of Power, Centering Community

The Share Fund's Story of Incorporating Participatory Grantmaking in Family Philanthropy

Introduction

This guide offers insights and inspiration for family philanthropists to consider how they can implement participatory grantmaking into their giving. It shares how one family, the Marklyns, established The Share Fund, a participatory giving model that is not funded with endowed funds, but by their deliberate, annual redistribution of their assets to their mission. Their experience is an offering — to the broader philanthropic community and families curious about the model — to learn about one family’s journey to developing a participatory grantmaking model that is intentionally designed to shift power and redistribute wealth. As one of The Share Fund Group members expressed, their model is about “creating something new in a way that will be able to serve the community without strings attached.”

Families interested in alternative grantmaking models should know that “participatory grantmaking is both a power-shifting ethos and a process that places the community they wish to serve at the center.”¹ It is a flexible, iterative model that offers families an opportunity to democratize their private philanthropy by shifting decision-making power to the communities most adversely impacted by inequity. If families commit to their own learning and growth, participatory grantmaking can offer an expansive way to deepen their family legacy through the values alignment of granting out dollars with a community-centric, equitable process.

¹ Gibson, C., 2018. *Deciding Together: Shifting Power and Resources Through Participatory Grantmaking*. Foundation Center. https://learningforunders.candid.org/wp-content/uploads/sites/2/2018/12/DecidingTogether_Final_20181002.pdf

How to Use the Guide

This guide is written in three sections:

- 1. Section 1** documents the history and basic principles of participatory grantmaking. It explores its philosophical tenets and how the model is aligned with an activist ethos. It also offers examples of philanthropic giving that are using the participatory grantmaking model, including historical examples, funding collaboratives, and family philanthropy.
- 2. Section 2** summarizes The Share Fund's first cycle of funding across Washington state. This includes the Marklyns' journey to wealth and their decision to pursue participatory grantmaking. This section also discusses initial stakeholder conversations and recruiting for the Design Group. It covers how the Group built relationships, practiced collaboration and power-shifting, designed the grants program, and finalized grantmaking decisions.
- 3. Section 3** highlights key takeaways from The Share Fund's participatory grantmaking process. Many of the individuals involved in The Share Fund implied or directly stated, "You don't know what you don't know." This section offers lessons gleaned from how The Share Fund design and funding process unfolded for the Marklyns, the Group members, and Grantees, so that another family may gain enough insight to establish their own methodology. This, of course, comes with the caveat that no two experiences are alike. Perhaps the biggest takeaway for a family curious about participatory grantmaking is that it is emergent, innovative, and flexible.

There are also two standalone sections incorporated into the guide on investments and grantees. These two sections are relevant because investment strategies and grantee relationships are additional areas for families to enact their values.

1 Background

Participatory Grantmaking

What Is Participatory Grantmaking?

Participatory grantmaking is a flexible giving approach with an intent to shift power: the power to decide where, how, and to whom to give. Historically, those who have accumulated wealth and have established a means to give are the ones who have held decision-making power. Participatory grantmaking offers an alternative vision to give decision-making power to communities who haven't historically been invited into philanthropy. It disrupts the assumption that those with wealth and those in power should decide where the dollars go. Since "participatory grantmaking cedes decision-making power about funding — including the strategy and criteria behind those decisions — to the very communities that funders aim to serve," each community has the opportunity to create their own process.² More foundations and donors have begun to explore participatory grantmaking over the past few years, spurred on by increasing global wealth inequities exacerbated by the COVID-19 pandemic and cross-racial movements against racism and police violence. Practitioners of participatory grantmaking estimate there are hundreds of new participatory grantmaking processes across the globe.³

Why Is Participatory Grantmaking Important?

At its roots, participatory grantmaking is about interrogating the established philanthropic status quo. As Anand Giridharadas states in *Winners Take All: The Elite Charade of Changing the World*, "elites have spread the idea that people must be helped, but only in market-friendly ways that do not upset fundamental power equations."⁴ For example, wealthy families seeking to become philanthropists are offered options that help to preserve donor wealth through tax deductions and minimal giving requirements, such as a private foundation, or increasingly, a Donor-Advised Fund (DAF). These options also limit charitable giving to registered nonprofit organizations. Giridharadas also highlights that "more and more of the money given to charity has been delayed, sometimes for decades, if not marooned indefinitely in the endowments of private foundations and in the Donor Advised Funds, which are akin to 401(k)s for philanthropy but have few regulations or requirements."⁵

² Gibson, C., 2018. *Deciding Together: Shifting Power and Resources Through Participatory Grantmaking*. Foundation Center. https://learningforfunders.candid.org/wp-content/uploads/sites/2/2018/12/DecidingTogether_Final_20181002.pdf

³ Health & Environmental Funders Network, 2022. *Participatory Grantmaking 101 Webinar*. <https://www.youtube.com/watch?v=aO68BKNx12I>

⁴ Giridharadas, A., 2019. *Winners Take All: The Elite Charade of Changing the World*. New York: Knopf.

⁵ Kulish, N., 2021. "How Long Should It Take To Give Away Millions?" *The New York Times*. <https://www.nytimes.com/2021/06/09/business/donor-advised-funds-philanthropy.html>

Additionally, since much of philanthropy is still donor-centric, granting through a top-down, often opaque process, it keeps the donor comfortable in their position of power. Often, funders set strategies, review applications, and make grant decisions without engaging with outside stakeholders. Although donor-centric grantmaking may *intend* to center the community that receives the grants, the inherent power dynamic limits this possibility. If they are not in conversation with grantees, donor-led grantmakers at best can only guess what their grantees will most benefit from. Sometimes those guesses may align, but often they don't, which can stifle grassroots work toward addressing systemic issues.

Therefore, there can be no sustainable change without centering community wisdom. The global disability rights movement has coined an apt statement that supports that tenet: "Nothing about us without us." Only the community itself can speak to the complexity of its experiences, the impacts of systemic forces, and the most uplifting approaches for healing and wellness.⁶ Participatory grantmaking centers those at the margins and offers them an active stake in their vision of justice.

Participatory Grantmaking, Power, & Equity

The shift toward participatory grantmaking and other forms of donor-decentralized philanthropy has not occurred in a vacuum. Activists and social justice leaders have long highlighted how the institution of philanthropy has perpetuated inequity. Most notably, *The Revolution Will Not Be Funded: Beyond the Non-Profit Industrial Complex*, written by the collective INCITE! Women of Color Against Violence and published in 2007, is an accumulation of the thoughts and perspectives that have been discussed in community spaces for many decades. In the early 1900s in the US, philanthropy received an enormous boost through legal and tax stipulations, most notably The Revenue Act of 1913, which exempted charitable organizations from the newly established income tax.⁷ While well-intended at the time, this and subsequent tax exemptions ushered in the era of wealth accumulation. Since then, the growing over-reliance on nonprofits for meeting public welfare needs has stymied movements for social justice. Because of the constant need to fund their organization, community leaders are left with little room to imagine solutions beyond what philanthropy has deemed possible and, therefore, fundable. The nonprofit model also limits how communities can organize and advocate for change through political donation stipulations.

The shift toward participatory grantmaking can relieve some of these burdens built into the system. It can also provide an opening for funders to establish a radical trust with their grantees. As the philanthropic field works toward equitable grantmaking approaches, this

⁶ Paterson, H., 2020. *Grassroots Grantmaking: Embedding Participatory Approaches in Funding*. Winston Churchill Memorial Trust. <https://hannahpatersoncom.files.wordpress.com/2020/11/grassroots-grantmaking-embedding-participatory-approaches-in-funding.pdf>

⁷ INCITE! Women of Color Against Violence. *The Revolution Will Not Be Funded: Beyond the Non-Profit Industrial Complex*. South End Press, 2007.

history needs to be acknowledged and accounted for through bold funding approaches such as participatory grantmaking.⁸

Philanthropy is often framed as a unidirectional relationship: The philanthropist gives money and the organization receives money. In addition, implicit biases of those in power often impact grantmaking values, processes, and decisions. Within this relationship, there is no room to engage with entrenched systemic inequities and to invest in imagining a different approach. The philanthropist–nonprofit funding model relies on historical systemic inequities of [resource extraction and wealth accumulation](#).⁹

Participatory grantmaking opens conversations about equity that consider race, language, disability, and many other intersecting identities that are often left out of conversations about power and wealth. Participatory grantmaking proactively grapples with inequity, with all stakeholders involved striving toward equity in its design and approach. It brings into focus the needs of the people who have been most impacted by the unequal distribution of wealth, and by extension offers philanthropy an opportunity for accountability.

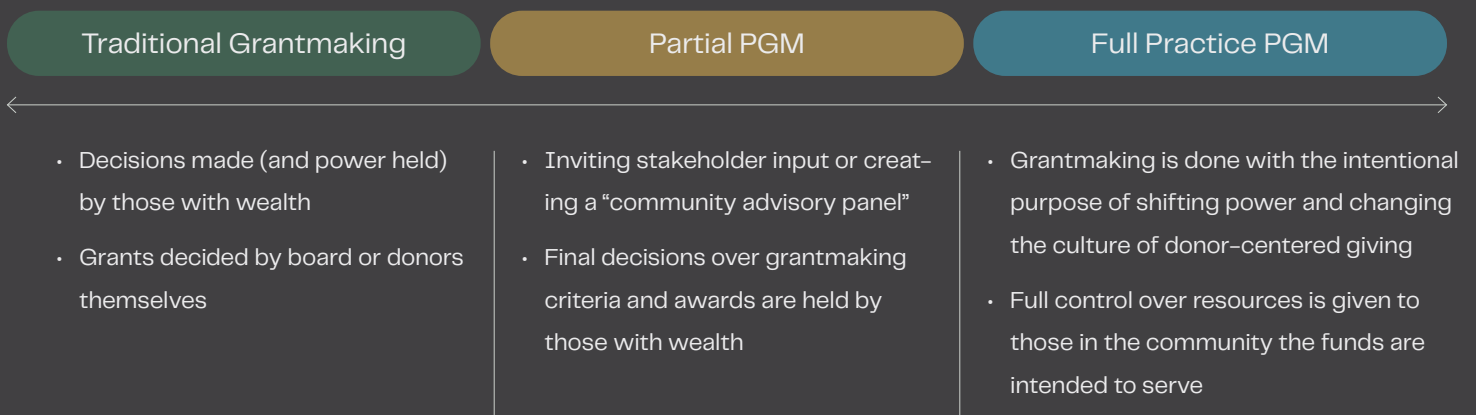
History

Participatory grantmaking approaches have been around for as long as charity has been around. As Cynthia Gibson shares in *The Historical Case For Participatory Grantmaking*, “Communities of color have particularly rich traditions of giving on which to draw, often forged out of necessity when the larger society actively sought to discourage their collective action.”¹⁰ Communities, collectives, and families have historically been giving in a decentralized manner for much longer than the modern development of philanthropy. As for foundations and family philanthropy, many have been incorporating participatory approaches, such as giving everyone a voice/vote on grantmaking regardless of financial input,

⁸ INCITE! Women of Color Against Violence. *The Revolution Will Not Be Funded: Beyond the Non-Profit Industrial Complex*. South End Press, 2007.

⁹ Justice Funders and The Resonance Collaborative, 2019. “Stifled Generosity: How Philanthropy Has Fueled the Accumulation and Privatization of Wealth.” *Justice Funders*. <https://justicefunders.org/resonance/>

¹⁰ Gibson, C., 2019. “The Historical Case for Participatory Grantmaking.” *HistPhil*. <https://histphil.org/2019/08/15/the-historical-case-for-participatory-grantmaking/>



or bringing in community experts to inform decision-making. However, these approaches have been piecemeal. Participatory grantmaking is most effective when aligned with the intentional purpose of shifting power and changing the culture of donor-centric giving with its implementation.

The Funding Exchange

The history of participatory grantmaking as a community-driven process and power-shifting approach started with the [Funding Exchange](#), a US-based national network of social justice foundations created in 1979. The founding members were young activists with inherited wealth who envisioned a “change, not charity” approach in their giving. This perspective allowed the collective to imagine and incorporate much of what we see in the field today: inviting in and giving power to community members, providing seed funding and unrestricted operational support, and directly funding grassroots social justice movements. The Funding Exchange was legally dissolved in 2018, but the 16 independent member foundations continue to operate grantmaking programs in their respective regions.¹¹

Southern Partners Fund

In 1994, the Bert & Mary Meyer Foundation recognized the importance of having community leaders in decision-making power. So they invited 18 grassroots community leaders from the rural South to become part of a new grantmaking program that would support grassroots community organizing across a 12-state region (Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, South Carolina, Tennessee, Virginia, and West Virginia). The group became known as the [Southern Partners Fund](#), incorporating into their own philanthropic organization in 1998. It has a two-tiered board and member selection process that ensures everyone elected to positions are connected to the movements they fund, evidenced by the demographics of their membership. The majority are Black & Latino community leaders and many are previous grantees.

Disability Rights Fund

Participatory grantmaking is often leveraged to organize and elevate communities who have faced historical barriers to wealth due to extractive and oppressive policies. Therefore, many of the funds that do utilize participatory grantmaking have an explicit activist element and owe much to the visioning of community organizers. A well-known example of participatory grantmaking is the [Disability Rights Fund](#), a global grantmaking collaborative between donors and the global disability rights community that has been centering disability-inclusive approaches since 2008. The Disability Rights Fund leverages its pooled fund to grant in a flexible way to grassroots organizations. Since “only 2 percent of global human rights and international development funding goes to people with disabilities,” the Disability Rights

¹¹ Lurie, T., 2016. *Change, Not Charity: The Story of the Funding Exchange – A Pioneer in Social Justice Philanthropy*. The Funding Exchange. https://www.fex.org/content/uploads/2017/05/funding_exchange_history_spring_2017.pdf

Fund’s participatory grantmaking strategies that work directly with persons with disabilities are a necessary shift.¹²

Indigenous Women’s Flow Fund

The [Indigenous Women’s Flow Fund](#) (IWFF) is a multigenerational cohort of Indigenous women from across the United States committed to “breaking open predictable patterns of philanthropic decision-making.”¹³ With the Kindle Project providing capacity as a philanthropic intermediary, the IWFF donors trusted the cohort with the entire grantmaking process. Through emergent design, co-creation, and co-facilitation, the cohort granted \$315,000 to 22 Indigenous-led grantees across the United States in 2020, its first year. The Fund also built in a shared learning process, where the donors and grantmaking cohort creatively reflected on the process of collectively shifting power. Both donors and the cohort expressed gratitude for participating in a grantmaking relationship that trusted the wisdom of Indigenous women.

Family Philanthropy: The Conant Family Foundation & Tzedek Social Justice Fund

Participatory grantmaking in the family giving context comes with its own particular considerations. Relative to the broader philanthropic field, there are fewer families visibly implementing participatory grantmaking – but curiosity and momentum are growing. In the past few years, more participatory grantmaking dialogues in the broader philanthropy sector have been incorporating family voices.

One such foundation, the [Conant Family Foundation](#), was an early model for The Share Fund. In early 2020, the third-generation members of the Chicago-based Conant Family Foundation realized that it was one thing for the foundation to fund racial justice, but a whole other thing to do racial justice work. In response, the foundation put aside \$250,000 for what they called “an experiment in decolonizing wealth.”¹⁴ With the help of Conant’s executive director, the family foundation reached out to three well-respected and highly connected Chicago nonprofits working on social and racial equity, asking for recommendations of BIPOC (Black, Indigenous, People of Color) community members who could serve on a review team. The 10 people who comprised the group were paid stipends for their work and developed a rubric for reviewing and making grants to 17 Chicago-based organizations.

Another example is the [Tzedek Social Justice Fund](#), based in Asheville, North Carolina. In 2021, after a “year-long community research and reflection process,” Tzedek intentionally shifted its role to be a “community-accountable funder” that “partners with grantees in the fight for liberation for all people.”¹⁵ With that came a shift in its grantmaking practices,

13 2021. *Indigenous Women’s Flow Fund: 2020–2021 Storytelling*. Kindle Project. <https://kindleproject.org/wp-content/uploads/2021/06/IWFF-Storytelling-Report.pdf>

14 Ramyk, L., 2020. “Shifting Power and Co-Creating Equity: An Experiment in Decolonizing Wealth.” *Conant Family Foundation*. https://www.conantfamilyfoundation.org/reviewteamprocess_1

15 Davis, M., 2020. “Accelerating Change: A Model for a Funding Response to COVID-19.” *NCFP*. <https://www.ncfp.org/2020/05/12/accelerating-change-a-model-for-a-funding-response-to-covid-19/>

and the fund recruited its first cohort of Community Grantmaking Fellows for its new Community-Led Grantmaking process. The cohort collectively decided the theme for the 2021 funding cycle to be Collective Liberation. After five months of relationship building, designing, and facilitating their participatory process, the Community Grantmaking Fellows awarded \$250,000 to 10 organizations.¹⁶

Family Philanthropy & Participatory Grantmaking

What makes the family giving context different when considering participatory grantmaking? This section will focus on three variables that emerged in the literature and in conversations with professionals who work with high net-wealth families to design their giving.

Inherited Wealth & Legacy

Challenges may arise if multiple family members have varying feelings on giving. In particular, it can be emotionally tricky for family members with inherited wealth to honor their family's giving legacy while exploring different funding models. The first generation of family members who accumulate wealth often establish a giving plan based on their interests at that time. And although they may want to try something different, younger generations often feel a responsibility to follow their grandparents' (or great grandparents') original vision. This can be coupled with the feeling that they didn't earn the money, so they don't have the right to change things. Younger generations may also need to prove that their ideas are "worth the investment," especially when it comes to lesser-known funding approaches. For example, there are anecdotes of younger family members requesting older family members to fund smaller, one-time participatory grantmaking processes as an experiment to prove that it could be effective.

Legacy can be a leverage point or it can be a sticking point. It is an intimate matter that ties together the identity of a family, and therefore will bring up a lot of emotions. It can feel scary to try something different or new. If families are feeling stuck, it may be helpful to revisit the initial values that inspired them to give and see how those align with participatory grantmaking. There may be an opportunity to reframe legacy to include uplifting and centering community in grantmaking.

Administrative & Programmatic Support

According to data from the [National Center for Family Philanthropy](#), about 15% of family foundations are unstaffed. Another 15% of family foundations have family serving as staff, often as unpaid volunteers.¹⁷ The smaller the foundation's assets, the less likely they are to have a full-time staff member managing day-to-day operations. In traditional donor-centric grantmaking, this level of staff support might be sufficient. But participatory grantmaking is time- and resource-intensive, and will need staff support to provide project management.

This is to ensure the burden of tasks — such as scheduling meetings, setting agendas, taking notes, following up on action items, and grants management — do not fall on the participatory grantmaking cohort. Having staff skilled in project management helps ensure the integrity and sustainability of the participatory grantmaking process.

Integrating Participatory Processes vs. Building Participatory Grantmaking

A few themes emerged regarding families' perspectives on participatory grantmaking in interviews with philanthropy professionals working in family giving. When introduced to the model, families were varied in their responses. There was often a curiosity mixed with hesitation and uncertainty. Although participatory grantmaking is gaining traction in philanthropy circles, it is clear that unless the family is engaged in conversations on equity and power, it will more often than not be an unfamiliar model.

Curiosities & Concerns

Upon learning that participatory grantmaking intends to democratize philanthropy, families may express excitement about the potential to shift their grantmaking. However, imagining handing over power to others outside the family, albeit members of communities who would benefit most from their grantmaking, can be a challenge. A few practitioners have shared that many families are open to community shaping the process and being a part of a grantmaking panel but still prefer to be involved in the grantmaking decisions, and/or have a “final say.” Although the family may hope to support issues of equity, they struggle to imagine handing over that power (and their public legacy). Uncertainty and fear arise regularly, and if not grappled with, can influence a family's commitment to participatory grantmaking.

Therefore, families approaching the possibility of utilizing participatory grantmaking for their philanthropic giving generally use one of two approaches: those that incorporate participatory processes into already established grantmaking strategies, or those that build a fund that is an explicit vehicle for the participatory grantmaking process. Both options provide an opportunity to engage with the participatory process, but only the latter is considered participatory grantmaking in its fullest sense.

Integrating Participatory Grantmaking

There are challenges in integrating piecemeal participatory grantmaking strategies into an already established grantmaking process. This statement is not meant to dissuade families who are considering incorporating participatory processes, but to provide context so that they are aware of the potential challenges they may encounter. Families might assess unfamiliar participatory processes in contrast to “how it's been done before.” This can set up a false dichotomy for a participatory process to seem like it is failing. In other words, families

might feel that their established funding styles exist in opposition to a new and perhaps more challenging mindset, resulting in their choice to continue with what is comfortable. The important thing to remember, though, is that participatory grantmaking is often unfamiliar, and its measures of success and sustainability are hard to track against traditional metrics. This implicit bias that favors a specific type of quantitative data is a philanthropy-wide issue.¹⁸

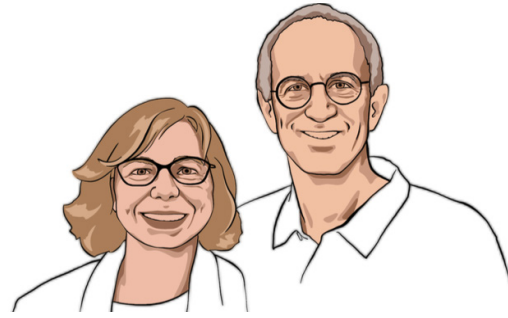
A family may hesitate to explore the potential of participatory processes because of the uneasiness they experience in trying to fit it into their previous operating standards. They may then opt to return to their more familiar grantmaking approach. Anecdotally, one family philanthropy advisor estimates that this reversion to the donor-centric style of grantmaking is most likely to occur at about three years and/or three grant cycles into a family's integration of participatory processes. However, given that participatory grantmaking is gaining momentum and visibility, there seems to be more of an appetite and opportunity for families to talk frankly about their hesitations and find a peer network from which they can learn. Part of the intention of this resource guide is that it becomes an opening for future dialogue with families who are shifting their giving practices to be more equity-driven and community-centric.

Launching Participatory Grantmaking

Families seeking to launch a participatory grantmaking fund must recognize the time and financial resources it will take. They must also understand and appreciate how participatory grantmaking offers them a chance to deepen their values of transparency, community, learning, commitment, flexibility, and justice. This commitment to the process starts early, when they release power and control of the design to the community. Many remain involved in the grantmaking process by either being a part of the decision-making body or having a board member or staff member as a proxy. However, even these family-adjacent individuals can sway the community members from fully investing in a power-shifting process. There are very few examples of families completely giving up their access to the process like the Marklyns have done with The Share Fund. But there is a hope that more family funds will emerge as models for participatory grantmaking far into the future.

¹⁸ Savage, B., et al, 2020. "Overcoming the Racial Bias in Philanthropic Funding." *Stanford Social Innovation Review*. https://ssir.org/articles/entry/overcoming_the_racial_bias_in_philanthropic_funding#

2 The Share Fund Vision and Process



The Marklyns

Early Philanthropy

Bill and Holly Marklyn are a white couple who accumulated their wealth as early Microsoft employees who received stock in the company. They are each part of the first generation in their family to acquire wealth. However, they have committed to giving away their wealth and not having it accumulate beyond their generation. The Share Fund emerged after several years of exploring and envisioning a grantmaking process that would align with their values of gender and racial equity and wealth redistribution.

Holly and Bill were committed to philanthropy in their early years together, utilizing Microsoft's generous employee matching program. Like many families, their early giving focused on their personal interests and involvement, such as giving to arts and culture organizations whose events they attended. Gender and racial equity influenced this giving to some extent, but upon further reflection and with deeper understanding, they came to realize the importance of making these inequities their primary focus.

Working With Phīla Engaged Giving

The Marklyns had been learning about and reflecting on their power and privilege for decades, influencing decisions such as where to live, where to send their kids to school, and how to focus their philanthropy. Over the past five years, they have deepened their analysis of racial and gender inequity, wealth redistribution, and their role as wealthy white allies. This analysis informed how they approached establishing a giving plan that aligned with their values.

In 2018, the Marklyns began working with Stephanie Ellis-Smith, CEO & Principal of Phīla Engaged Giving (pronounced "phy-la"/with a long "i" sound), a Black-owned, values-driven, philanthropic advisory firm. As founder of the firm, Stephanie has a 20-year track record of social sector leadership in the Seattle area. The selection of a Black-owned firm was deliberate as well as opportune. The Marklyns first became aware of her community work in 2001, when she worked on the [Jacob Lawrence Catalogue Raisonné Project](#), a prestigious art history endeavor (and the first ever done for a Black artist) that located, cataloged, re-photographed, and published the 1,100-work portfolio of the artist. Without ever meeting Stephanie in person until 2018, they followed her work building social change organizations like the Central District Forum for Arts & Ideas, and much later, Giving Gap (formerly known as Give Bck). Once Stephanie began her practice in donor advising, they reached out to her for the first time.

With the guidance of Stephanie and her colleague Lauren Janus, a philanthropic advisor and COO of the firm, the Marklyns clarified the values that had inherently been a part of their giving. In their Giving Plan, they made explicit their focus on gender and racial equity, utilizing the framework of [targeted universalism](#) to direct funding to organizations serving the most impacted populations, as well as investing power in organizations led by women and BIPOC folks. The Marklyns also planned to significantly increase their giving amount and explore more carefully how it could be done.

Because they did not want their giving to be limited to nonprofit organizations (as required with a foundation or DAF), the Marklyns financed The Share Fund through a DAF and their active investments. This gave them more flexibility to fund nonprofits, for-profit entities, and individuals. While not necessary, the Marklyns established a limited liability company (LLC) to create an umbrella under which all The Share Fund expenses and grants could be managed. Funds that the Marklyns need for future The Share Fund grants — as well as their own living expenses — are invested in line with The Share Fund’s overall mission of furthering race and gender justice (which will be further discussed in the “Investments Pop-Out”).

The Aha Moment: Participatory Grantmaking

The Marklyns recognized their giving couldn’t rely on the familiar top-down decision-making if they were focusing on wealth redistribution and racial and gender justice. They did not want to perpetuate further inequity through their funding process and knew they should not be the ones deciding the grantmaking. Many of the giving strategies they had learned about or heard about through their peer network of family donors didn’t capture the intentional equity-driven vision they sought. When Stephanie shared a Justice Funders webinar about [just transition](#) practices in philanthropy in spring 2020 that discussed participatory grantmaking, the Marklyns saw the potential for their values and vision to align.

The Marklyns have committed fully to a model that requires them to cede power and control. They acknowledge the occasional desire to offer their own thoughts, but have worked hard to accept those feelings, withhold their suggestions, and trust their vision. They modeled this trust from the beginning: They did not interview the Group members, instead trusting that the Phīla team would find the right participants. They also did not have any final decision-making say on the type and amount of grants. The Marklyns’ sole contributions to The Share Fund are financial.

Redefining Legacy

The Marklyns expressed that they are not interested in upholding a family legacy through their name. Bill stated their current giving plan and future funding vision are based solely on the question, “Can we change the system somehow?” They saw this first year of The Share Fund as building a flexible blueprint for future cycles to use as a model. The Marklyns have also committed to sustainably growing the fund over the years. By documenting the

process of The Share Fund, they are offering the field of family philanthropy insights into their experience of establishing an equitable giving model. Finally, they hope their work will bolster grantees' ongoing advocacy to shift philanthropy to be more just and proximate to the communities they are serving (which will be further discussed in the "Grantee Pop-Out").

The Share Fund Design Process

Outreach & Research

Once the Marklyns made the decision to pursue participatory grantmaking as their primary funding model, the Phīla team began conversations with practitioners of participatory grantmaking to learn more about the model. They also connected with a broader group of stakeholders, which they called the Input Group, to learn more about how to implement the model in Washington state and to begin their recruitment process.

As mentioned in previous sections, although participatory grantmaking has a history in the broader field of philanthropy, it is much less common in family philanthropy. Therefore, outreach conversations comprised grantmakers who were implementing this model *across the philanthropic sector*, not just in family giving. Phīla talked to several individuals either studying or practicing participatory grantmaking. Many spoke to the emergent and iterative nature of participatory grantmaking and the need for committed resources, transparency, and flexibility. They also stressed the importance of setting expectations early on with participatory group members, and simplifying processes in both the overall program design and the grants application.

The Phīla team assembled the Input Group through recommendations from their extensive network. This part of the process greatly benefitted from having a Black-led advisory team with deep ties throughout Washington state. Phīla's outreach led to an Input Group of nearly 20 BIPOC community members in local government, the public sector, and nonprofits across the state. Of these individuals, Phīla requested feedback on the initial proposal of The Share Fund (see Appendix A, "Overview of The Share Fund") and asked for additional reflections on how to support the role of the participatory group. A few key points emerged across the conversations: the necessity for a stipend, thoughtful formation of a diverse group, the importance of relationship building, and community-driven strategies for getting the word out about the grants process.

Recruitment

The Input Group also served as a key recruitment vehicle for the five individuals who comprised the Design Group. The Marklyns offered their hopes for some of the traits they'd like to see in Group members, but they refrained from being a part of the process so they wouldn't influence who would be invited. From the over 40 names offered by this Input Group, Phīla



**BRIDGETTE
HEMPSTEAD**

Founder and Executive
Director of African
American breast
cancer nonprofit



**ELISHEBA
JOHNSON**

Curator, Poet, Public
Artist, and Consultant



**ESTAKIO
BELTRAN**

Director at Yakima
Valley Community
Foundation



**KARLA
BROLLIER**

Environmental
Justice Advocate



**RASHAD
NORRIS**

Founder of Relevant
Engagement
Consulting, LLC

narrowed down a list based on geography, issue area expertise, gender, and race, and met with each of them individually. Through the meetings, they shared their hope for the Share Fund process, providing written materials highlighting their vision and the proposed role of the Design Group (see Appendix B, “The Share Fund Roles and Responsibilities”).

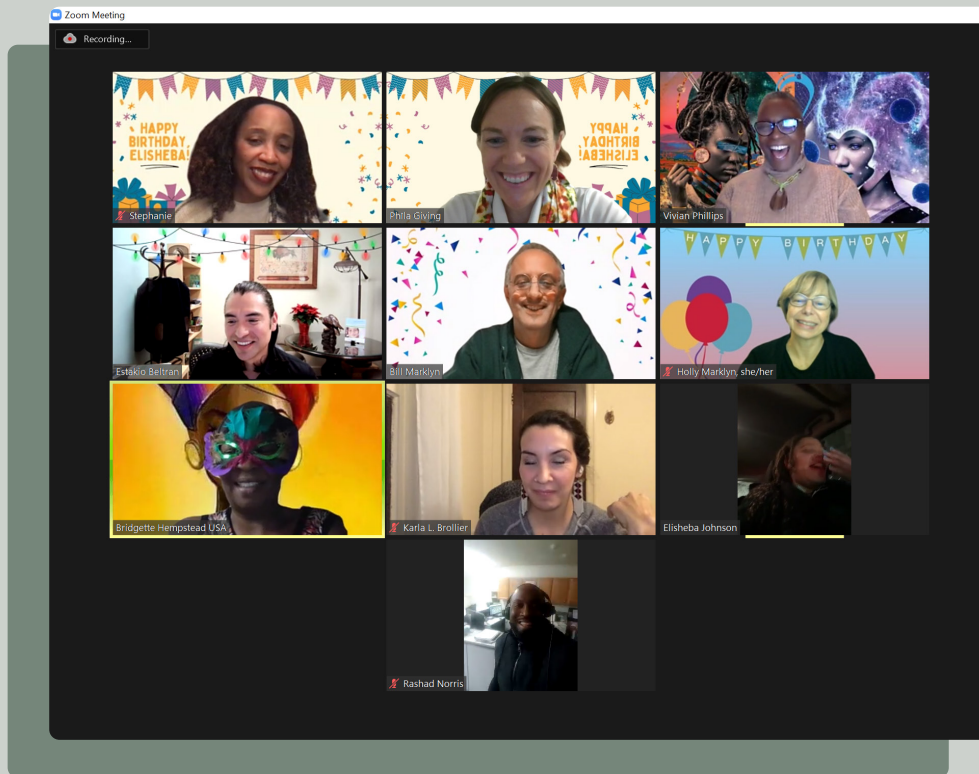
Group Traits

The Marklyns and Phīla were looking for potential Group members who were flexible, group-driven, had a clear vision of justice, and were able to sit with the discomfort and ambiguity of an unknown process. As Stephanie stated, they sought individuals “with a propensity to be trusting and trustworthy.” As in many industries, there are philanthropy and nonprofit leaders who see themselves as experts, and offer their expertise regularly in group settings. Regardless of these leaders’ intentions, their voice and perspective can be dominating and intimidating. This type of leader could influence the dynamic of a small group tasked with collaboratively building an entire program. So recruitment conversations were an opportunity to learn more about each individual and assess their leadership style.

The Design Group Five

The Share Fund invited only five individuals to be a part of the Design Group and all five agreed. The members spoke to the excitement of being a part of something innovative in the grantmaking sphere. As individuals who had been both applicants of grants and participants in other grantmaking processes, they were hopeful about the potential of contributing to a power-shifting model. One spoke to their dissatisfaction with previous funding processes they had taken part in and saw their involvement in The Share Fund as an opportunity to “convert that energy for a momentum toward something better” in the philanthropic realm.

The individuals that composed the Design Group came from varying backgrounds and geographic regions. All five are BIPOC; specifically, three are Black and two are Indigenous. This is important, as BIPOC is a catchall term for all people of color, which erases the specific lived experiences of Black and Indigenous folks who often face much greater barriers to



access.¹⁹ Three out of five are women. This was a purposeful recruiting decision because The Share Fund has an explicit focus on both racial and gender equity. All Group members have had some experience in the nonprofit world, either as nonprofit leaders and founders, involved community members, employees of nonprofits, or as grantmakers to nonprofits. As is the case with many BIPOC leaders, they hold many different roles as professionals, mentors/teachers, activists, artists, and family members.

Finding the Right Facilitator

The facilitator, Vivian Philips, also joined The Share Fund at this time. From conversations with the Input Group, Phīla and the Marklyns knew that they would need an outside facilitator to guide the meetings through at least the first year of The Share Fund. Given the fact that both Stephanie and Lauren were so deeply involved since its inception as well as their having a growing closeness to the Marklyns themselves, it seemed important to have an impartial outsider who could help lead the Group without any undue bias.

Vivian was chosen for the role because Stephanie knew her personally and professionally for over 20 years. Vivian is a well-respected mentor to many in Seattle's arts community and is a Black woman with a strong background in communication and facilitation. She taught at

¹⁹ Grady, C., 2020. "Why the term 'BIPOC' is so complicated, explained by linguists." Vox. <https://www.vox.com/2020/6/30/21300294/bipoc-what-does-it-mean-critical-race-linguistics-jonathan-rosa-deandra-miles-hercules>

the university level for decades and had experience serving on numerous statewide non-profit boards and grant panels, which gave her insight into how to facilitate The Share Fund's process with respect and inclusivity.

Whole-Self Approach

Group members were balancing many commitments and responsibilities during an especially stressful time, including the second year of the COVID-19 pandemic, wildfires and other climate disasters in their communities, and ongoing racist violence. The Share Fund process built in a “whole-self” approach that honored the holistic expertise of each Group member. BIPOC communities and other marginalized communities must often fit into a dominant-culture approach — i.e., one that empowers white supremacy and other intersecting systems of oppression — that invalidates much of their expertise rooted in their identities and lived experience. As one Group member shared about previous experiences working with white people in power, “I have a lot of heartache from having to prove [myself].” The Share Fund participants collectively understood prioritizing the whole self was one way they could commit to an equitable process. With that foundation, Group members began building trust with each other, knowing that their identities and experiences were respected.

Initial Meetings

The Share Fund created an initial timeline of 12 monthly meetings from January to December 2021. Each Zoom meeting ranged from an hour to two hours. Vivian and Phīla created a loose agenda for each meeting, which provided room for the Design Group to address agreements and stipends before focusing on grantmaking design and decisions.

Prior to the first meeting, the Design Group received preliminary materials, including the Marklyns' Giving Plan and a memo on The Share Fund. The intention was for the members of the Design Group to begin their role with enough information to understand the vision without overwhelming them with potentially taxing pre-work. The Marklyns attended the first meeting so the Design Group could hear from them directly and ask questions. Both the Marklyns and Group members expressed the overall feeling of this first meeting was a timid openness. None of the Group members knew each other, and none of them had met the Marklyns. Everyone was new to each other, but they all understood the potential of what they were embarking on together. So they were all working, in real time, to trust each other. To open the space, Vivian asked an icebreaker question (a standard practice for each meeting). The meeting then continued with a logistical and administrative overview.

The Marklyns did not attend future meetings. Instead, they watched the meeting recordings and discussed them with the Phīla team in what they named Soul Check-Ins. These check-ins made room for feelings rather than the play-by-play of the committee. They also created a space for the Marklyns to reflect on their personal growth while supporting the participatory grantmaking journey.

Balancing Sharing the Power With Bearing the Burden

From the beginning, the Marklyns told the Design Group they had the power to imagine and implement a grantmaking process to support communities working on racial and gender equity. They trusted the self-organization of the Design Group and prioritized a much more hands-off approach. Although Stephanie and Lauren attended meetings as observers, they were explicitly told not to interject. They sometimes provided additional clarity about the Marklyns' vision. This became tricky when they shared data but it was misinterpreted as a suggestion. They worked to balance sharing information without implying a decision or direction.

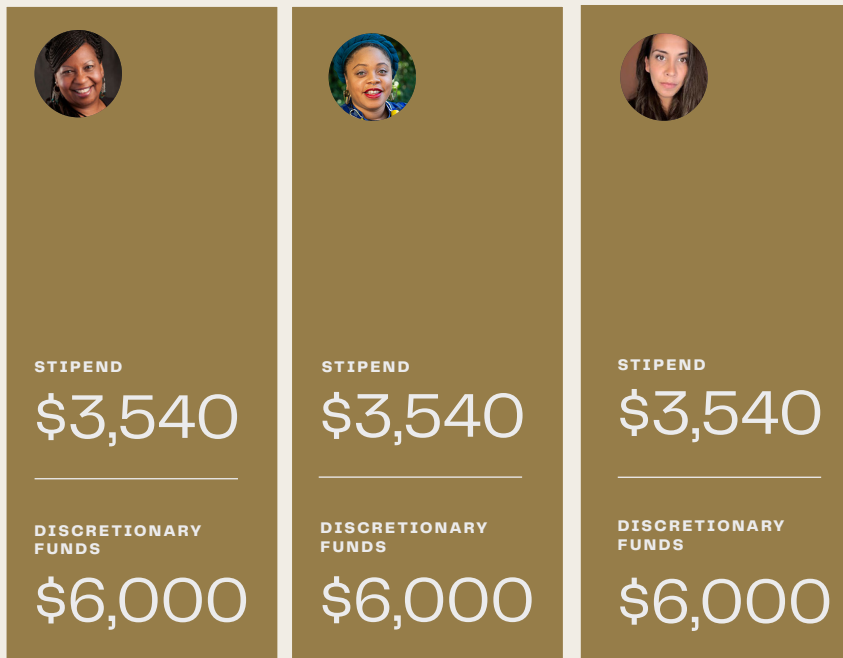
This hands-off approach also left the Design Group wondering how to manage their time between administrative and visioning work. After a few meetings and individual check-ins, the Marklyns and the Phīla team learned that the free-rein approach felt more burdensome than empowering. The Design Group found themselves doing more administrative work than they preferred. So the Phīla team began to play a more active administrative role, taking on the monthly tasks of agenda items, notes, and task follow-up, which freed up the Design Group to use their skills for designing the participatory process.

Power-Shifting in Real Time: The Conflict of Interest Policy

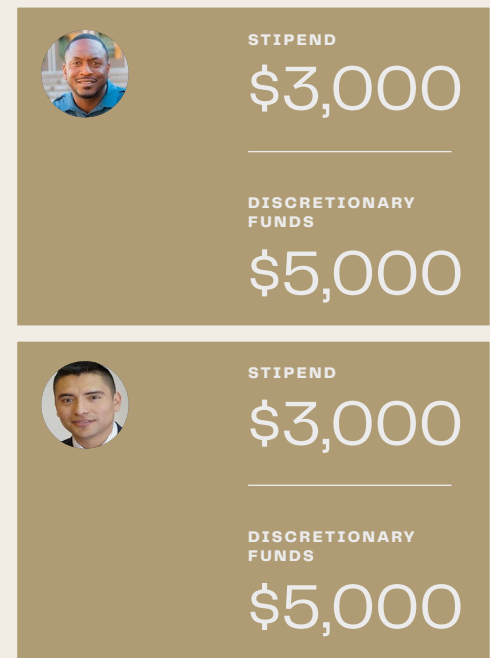
The Design Group dedicated the first few meetings to establishing group agreements, building trust with each other, and addressing previously established agenda items. In February 2021, the Group dove into conversations regarding the Conflict of Interest policy. While there was an assumption that there would be some policy, they were given a traditional policy as a template and the option to edit it as they saw fit. They discussed the Conflict of Interest as rooted in a colonial construct that wouldn't account for the reality that many BIPOC communities have overlapping roles and relationships. They stressed how their community leaders thoughtfully and transparently navigate being in relationship with each other when they occupy various professional, cultural, and familial roles. Therefore, the Conflict of Interest in its current form felt punitive because, as one member stated, it "inferred guilt [and] we're somehow not capable of being trusted to be a person of integrity." Instead, the Group collaborated on a new document that captured their vision: "The Community Trust and Transparency Policy" (see Appendix C).

They also drafted and finalized a Letter of Commitment to the Marklyns in the March meeting (see Appendix D). This was in response to the Marklyns' Letter of Commitment (see Appendix E), which they received prior to their meeting in January. This letter from the Design Group to the Marklyns stated, "Throughout this process, we commit to being learners and adapting our work as needed. As a team, we will develop our own ways of working, recognizing the importance of our individual voices in our collective decisions. We will expect integrity and transparency of each other in all aspects of this work." This letter signified the Group's understanding of what they had been asked to step into as members of The Share Fund, and that they were invested in the participatory process as much as the Marklyns

WOMEN



MEN



were.

Power-Shifting in Real Time: The Stipend

A significant portion of the spring meetings also focused on the stipend each Group member would receive for their involvement in The Share Fund. Conversations focused on how the Group could exemplify their vision of gender equity through the stipend amount each member would receive. Focusing on the “how” continued to be a theme in Design Group meetings. They spent time reflecting on the process to ensure it was just as equitable in their communication, materials, leadership, and relationships as the end product itself. Initially, the plan was for each member to receive a \$3,000 project-based stipend. In stakeholder conversations, this was the highest amount suggested for the Group’s time and skills over the year. Each Group member also had a \$5,000 discretionary grant they could grant to an organization of their choosing without consulting the rest of the Group. In February, the Group mentioned recalculating the stipend via a gender lens, and used most of the March meeting to discuss how to address gender equity through the stipend and grant.

The Group used both the lived experience of how gender oppression impacts access to resources, as well as data on gender inequities, to inform their discussion and final decision. Gender bias is a systemic issue with many impacts. It impacts individuals through the wage and wealth gap, and it also impacts philanthropic giving. Recent reports put funding to women’s

groups in the US as 1.9% of total charitable giving in 2021.²⁰ The Group continued to elevate the why of the discussion, naming how “women are central to culture and communities.” They affirmed the necessity of investing in women’s leadership because their perspectives continue to strengthen movements for social justice.

In the April and May meetings, the Group grappled with the nuance of changing the stipend using a gender lens. According to wage gap data, women make 82 cents on the dollar. But once disaggregated for race, this disparity increases for Black women (62 cents) and Indigenous women (57 cents).²¹ The Group discussed how the intersections of race and gender impact women differently based on race (not including other intersections). Ultimately, the Group members finalized the decision in May to increase the stipend by 18% for the women in the Group to address the overall wage gap of 18 cents. They also increased the women’s discretionary grant to \$6,000 (a little over 18%). They did so with the caveat that this one decision could not fully capture the complexity of inequity and required ongoing transparency and reflection, a process that future cohorts could revisit.

The stipend conversations allowed the Group to flexibly use their power for the vision of gender equity. This relatively low-risk decision (as opposed to the grants funding criteria and deliberations that occupied much of their time in May and beyond), proved to be a critical collaboration point for the Group members. It enabled them to communicate their individual and shared values, raise challenging feedback in real time, and synchronize their dynamic as they moved into the grantmaking design process. And even as it increased the Marklyns’ initial administrative expenses, it also showed their commitment to the Group’s vision.

Power-Shifting in Real Time: Funding Parameters

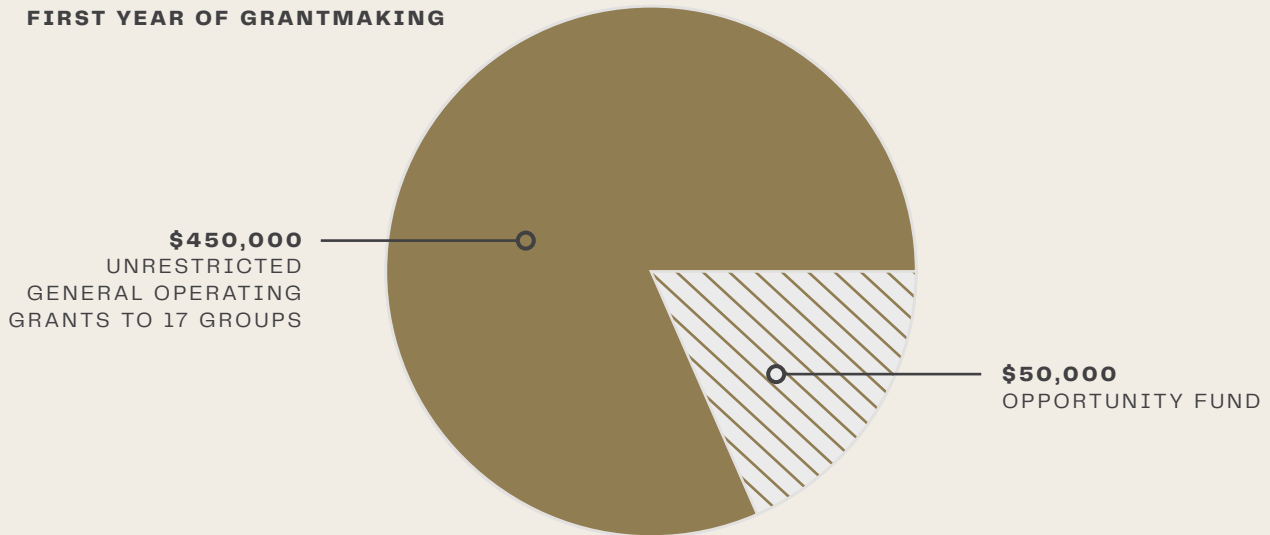
The Marklyns had designated \$500,000 for The Share Fund’s first year of grantmaking and they trusted the Design Group with imagining and designing all the grantmaking parameters. This included the tax status of the entity, grant amounts, the type of grant (multiyear, one-time, restricted, general operating), and the application process. In March, the Group brainstormed potential issue areas (which they called “buckets”), understanding that, except for the Fund’s explicit focus on racial and gender equity, everything they were sharing was flexible.

In April, Vivian and the Phīla team made time to meet with Group members one-on-one to help each Group member understand their grantmaking options before they started making decisions. Vivian and Phīla wanted to make sure that each Group member had clarity about their role and a chance to ask questions they might not yet feel comfortable asking in the larger meetings. From the beginning, the Group stressed they didn’t want to perpetuate inequitable approaches from previous funding structures they had been involved with. One member explicitly expressed

²⁰ Skidmore, T., and J. Bergdoll, 2021. *The Women & Girls Index: Measuring Giving to Women’s and Girls’ Causes*. Indiana University Lilly Family School of Philanthropy. <https://scholarworks.iupui.edu/bitstream/handle/1805/26857/wgi21-report.pdf>

²¹ Bleiweis, R., 2020. “Quick Facts About the Gender Wage Gap.” *Center for American Progress*. <https://www.americanprogress.org/article/quick-facts-gender-wage-gap/>

**THE SHARE FUND'S
FIRST YEAR OF GRANTMAKING**



their “yearning to disrupt systems” of funding that continued to center the wealthy white donor. Much of Vivian’s facilitation in early meetings focused on reaffirming this radical vision and holding space to imagine and articulate alternatives. Through the ethos of the participatory grantmaking model, the Group members could hold the important “why” of the work, which was to shift power and center the community who would most benefit from reducing barriers to access. Transparency and trust were at the forefront of this approach. They all agreed early on that potential Grantees knew what was best for their community, and they trusted Grantees to use the funds however they needed. Therefore, the Group worked to design a transparent process that considered their potential Grantees’ time and resources.

The Design Group identified who they were seeking to fund, which included grassroots, start-up, and small organizations with solutions-oriented and/or short-term projects. The potential groups would have BIPOC leadership that had to include BIPOC women. Through discussion, the Group confirmed that many of the community groups that they knew had been doing the consistent and often invisible work of on-the-ground community building. So they decided The Share Fund Grantees would most benefit from unrestricted general operating grants with no reporting requirements.

From the initial \$500,000 allotted for the 2021 Grant year, \$450,000 went to unrestricted general operating grants. The other \$50,000 became an Opportunity Fund, designated by the Group to “benefit the health, aspirations and broader well-being” of the Grantee’s team, with examples offered like buying ergonomic office equipment, attending trainings, and paying for childcare. Providing separate funds for each Grantee to spend on well-being aligned with the whole-person approach that is foundational to The Share Fund’s process. As a Grantee shared, the Opportunity Fund showed the Group focused “attention to individuals on the receiving end.” It highlighted a clear understanding of the effort it takes to do community-based work, and the necessity of supporting individuals doing that work.

Low-Barrier Design

Although the initial timeline had the Design Group making their funding decisions in September, the Group took time to structure the grants process to be low-barrier for their Grantees. As one member explained, “it was a process of breaking down and implementing a new system of giving, a process that was talked about but not implemented.” The Group had opted to do away with a formal application process. Instead, they conducted outreach to community members and did their own research to find community groups doing meaningful work that might be too small or not as consistently funded as well-known nonprofits.

The Design Group also took into consideration that many of the communities they were hoping to fund most likely wouldn’t have the time, resources, or institutional connections to apply for and successfully receive big grants. So they did much of the due diligence that often weighs down a grant application themselves, including verifying that the potential Grantee’s leadership was BIPOC-led and that their work focused on gender and racial equity. The Group discussed that even a request for a formal interview could feel anxiety-inducing for a potential Grantee. They didn’t want to put the burden on the Grantee to perform a certain way in order to be eligible for the grants, so the Group sought out necessary information through website research and brief, informal conversations (see Appendix F, “Potential Grantee Conversation Template”).

Deliberations

The Design Group used the September meeting to share how their outreach and research process was going, ask questions and gain advice on how to approach community members, and talk through how their potential Grantees aligned with the values set out by The Share Fund. In the October meeting, each member recommended three of their five groups to receive a one-time unrestricted general operating grant. Although the Group had initially considered multiyear grants, they chose to allot only one-time grants because with the time constraints they came up against in the first year, they felt they wouldn’t be able to do the necessary work to adequately assess multiyear grants.

Deliberation carried over to November because the October meeting also made time for the Group to meet and ask questions of the Marklyns’ Investment Firm, Re-Envision Wealth (see the “Investments Pop-Out”). And after nearly a year of investing their time and insights into this process, in November, the Group collectively agreed to fund 17 groups with one-time unrestricted general operating grants ranging from \$1,000 to \$55,000. After learning of the Grantees, Holly shared, “it was so rewarding to make the actual payments to such compelling organizations that we never would have found on our own without this process.” Each Grantee aligned with The Share Fund’s values: They were local, BIPOC-led (majority BIPOC women-led) groups focused on their communities’ vision of justice and well-being. The Grantees address a wide variety of racial and gender equity issues through their work, such as reproductive justice, economic justice, housing security, police violence against the Black community, and Indigenous education

Every Grantee, regardless of their grant amount, also received the \$3,000 Opportunity Fund grant.

“Feel Good Friday”

Two Design Group members called Grantees on a Friday afternoon in December, which affectionately became known as “Feel Good Friday.” None of the Grantees knew they were being considered for a grant through The Share Fund since the Design Group did not have a formal application process. The two members connected with Grantees via phone so they could get first reactions from individuals, offer further details, and answer questions.

The thread that tied the phone calls together was an initial shock that led to deep gratitude. Grantees expressed appreciation for the grant and for being seen in their vital community work. After this, the Group members’ responsibilities wrapped up for the first grantmaking cycle. Phīla then stepped in as administrative support for the grant agreements. They worked with each Grantee to disburse funds and answer additional questions about The Share Fund’s grants process.

Grantee Pop-Out

The Share Fund's BIPOC-led participatory grantmaking process prioritized the needs of their BIPOC communities. This fundamentally shifted the barriers to access that are baked into donor-led philanthropy. Grantees shared their gratitude for The Share Fund's no-barrier, trust-based approach, still a rare experience in philanthropy. One Grantee shared, "I am sitting here knocking on doors for so long and nobody has been opening up and then I get this call from you, thank you!" Another Grantee shared, "to be seen by my community is deeply touching."

In traditional philanthropy, grantees often have to justify their work or fit their work to a donor's vision, which is often opaque and can change. This process can feel demoralizing throughout, from the time it takes to do initial donor research, to finding eligible grants, to the application questions themselves, to site visits. This donor-centric grantmaking process prioritizes donors' perspectives on what is worthwhile community work, which reinforces a power dynamic that puts the grantee in a lesser position. As one Design Group member shared, "our communities are used to people passing through." Grantees have unfortunately learned to accept these transactional relationships built into philanthropy that continue to perpetuate inequity.

It should not solely be on grantees to advocate for a shift in these practices. If a donor implements participatory grantmaking, they are committing to a donor-grantee relationship that is generative instead of performative. A donor can move beyond just words and show in action that they are a trustworthy ally to grantees. They can invite grantees to share challenges and offer feedback, with the transparent guarantee that funding will not be contingent on grantees being polite or only affirming the donor. Donors can advocate for shifting grantmaking to be more community-centric, including advocating for policies that require philanthropists to give more of their endowments and be more transparent in their processes. And as donors are shifting their giving practices, they can be honest and speak from experience. They can share the challenges of unlearning top-down donor-centric giving while reiterating their commitment to shift to community-centric giving. Finally, donors can affirm and celebrate any grantee who advocates for a more just and participatory grantmaking process, and take their feedback into account as they continue to refine their own grantmaking processes.

As for grantees, they can inform themselves, ask questions, and advocate. Through a donor's communications (website, application, correspondence with the family or staff), grantees can discern whether donors might be open to having challenging conversations about race, power, and equity without being punitive. In addition, if a grantee has a long-term funding relationship with a donor family, they can leverage that trust and familiarity to start a conversation about the inequities of the grantmaking process. A cohort of grantees can also get together and strategize how to approach a donor with both gratitude for their support and an invitation to shift their funding practices. In all conversations, grantees should come informed with resources and examples of other donors (such as this guide) who are implementing a participatory model. As with any relationship with power inequities, assessing the risk of fallout is essential. There might be adverse impacts, but there can also be beneficial shifts. Grantee advocacy can help a donor on the edge of changing their practices to be more equitable to take that last step.

Investments Pop-Out

From the outset of creating The Share Fund, the Marklyns made a conscious decision to incorporate mission-related investing into their Giving Plan. As part of their overall commitment to wealth redistribution, they recognized the need to approach both their grantmaking and their investments with a robust equity lens.

Foundations are federally required to give away 5% of their endowments each year. The other 95% can be invested in the stock market. Many of these investments help grow the endowment but often contradict principles of the foundations' grantmaking. For example, some foundations grant to anti-poverty organizations but invest in private prisons or companies with labor-busting practices.¹ This also stifles the possibility of true systemic change, even as grantees work hard to counter large-scale impacts of extractive investments. But mission-related investing, or aligning investments to reflect the foundation's values, is gaining traction in philanthropy. For example, the Ford Foundation, which has been a major donor to climate justice organizations, made a recent announcement that they would be divesting from fossil fuel companies in favor of alternative and renewable energy companies.²

The Marklyns initially focused on finding a financial planning group that could understand the nuance of investing for social good with a clear racial and gender equity lens. Doing so meant moving their investments from their longtime wealth manager at a Wall Street investment house. An impact investing advisor, Nancy Reid, introduced Bill and Holly to [Re-Envision Wealth](#), a Black-owned investment advisory firm. There are very few Black-owned investment firms, and the Marklyns' decision to work with Re-Envision Wealth was beneficial for their investment strategy and aligned with their vision for equity in the financial services field. They receive insight and guidance from a firm with financial expertise and a focused dedication to closing the racial wealth gap.

The Marklyns' investment significantly increased the pool of funds under Re-Envision Wealth's financial management. This means that Re-Envision Wealth can offer a more expansive and cost-effective set of investment opportunities to their client base. Re-Envision Wealth's client base is over 80% BIPOC, so the Marklyns are supporting families who may not have had access to higher-end wealth-building opportunities that only come from a firm having a certain amount of assets under management (AUM). By seeking and committing to thoughtful partnership, the Marklyns exemplify how family philanthropy can support economic justice by influencing access to financial advice and opportunity.

When they first began working together, the Marklyns and Re-Envision Wealth discussed their theory of change. This included clarifying their definition of equity and what values informed both their investments and giving. The result was an Investment Alignment that was used as a roadmap for their investment strategy. As the Marklyns are investing and funding through their active investments, Re-Envision Wealth is working to ensure sustainable growth and returns that would

¹ Winters, C., 2018. "Foundations Have a Not-So-Charitable Secret." *YES! Magazine*. <https://www.yesmagazine.org/issue/good-money/2018/11/27/your-favorite-charity-has-most-of-its-money-in-wall-street>

² 2021. "Ford Foundation Announces Plan To End Investments In Fossil Fuels." *Ford Foundation*. <https://www.fordfoundation.org/news-and-stories/news-and-press/news/ford-foundation-announces-plan-to-end-investments-in-fossil-fuels/>

support the Marklyns' vision of increasing The Share Fund's amount over the years as well as their basic living expenses.

There is an ongoing misconception that investing for social good will sacrifice financial returns. Over the decades, as social impact investing has grown, this has turned out to be an unfounded concern. When a family begins their shift toward social impact investing, the investments tend to be long-term, but they still have similar returns compared to more traditional investments. And families don't need to immediately shift the entirety of their assets. Investment firms can work with a family to create a strategy and timeline that works for them.

Racial inequity has been shown to have negative impacts on the economy. A Citi study estimates that over the past two decades, racial inequality has negatively impacted the US economy upwards of \$16 trillion because of the ongoing four key racial gaps for the Black community – wages, education, housing, and investment. If these gaps were closed, it could add an estimated \$5 trillion to the US GDP over the next five years.³ Therefore, social impact investing offers the possibility for families to invest in a larger economic shift that will benefit the communities most economically impacted by racial and gender inequity.

³ Peterson, D., and C. Mann, 2020. "Closing the Racial Inequality Gaps." *CitiGPS*. <https://www.citivelocity.com/citigps/closing-the-racial-inequality-gaps/>

3 The Share Fund Learnings



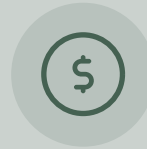
Clarify your values before embarking on participatory grantmaking



Elevate equity in the process



Commit to your personal journey around power, equity, and wealth



Provide adequate compensation for committee members



Be transparent about power, be proactive about soliciting feedback



It will take more time than you expect – be flexible and transparent



Trust the process, trust the participants



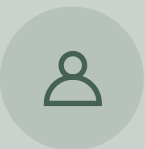
There are no failures, only learnings



Recruit with equity in mind



Alleviate burdens for grantees



Invest in administration and facilitation



Recognize grantee investment in your vision



Prioritize ongoing relationship building

Family

Clarify your values before embarking on participatory grantmaking

Although participatory grantmaking is gaining traction in philanthropy circles and may seem like the right fit for your family's giving plan, there are critical things to consider before making the shift. Take the time to reflect on the following questions:

- What is your comfort level with uncertainty and change?
- Are you willing to give up decision-making power, and if not, what is preventing you from doing so? What are the most important values in your grantmaking and how do they align with the values of participatory grantmaking?
- Are you willing to invest your time as well as financial resources?
- What is your metric of success? In many iterative models, success is difficult to pinpoint. Participatory grantmaking interrogates power and recenters community agency. This can be difficult to track, but it will benefit your community of grantees.

Clarify your giving plan before embarking on a participatory grantmaking process. If you have strong thoughts about how you define your giving scope and the issue areas your family is most passionate about, ensure your family agrees. Make sure this is understood by your participatory grantmaking group as well — for example, the Marklyns' giving plan focuses on gender and racial equity. The Group created a grantmaking program that honored that in their design process and final selection of Grantees.

Commit to your personal journey around power, equity, and wealth

There is no one way to learn about power and privilege, but it is vital to approach it as work that requires your dedication, openness, and humility. Families may seek coaching, peer networks, and online groups to support this work. It is vital to make room for discomfort because there will be moments when hard truths and contradictions will stretch you. For example, it may challenge families to learn about the racist roots of wealth inequity. As Edgar Villanueva writes in his book *Decolonizing Wealth*, “The basis of traditional philanthropy is to preserve wealth, and that wealth is fundamentally money that’s been twice stolen, once through the exploitation of natural resources and cheap labor, and the second time, through tax evasion.”²² Learning is a lifelong commitment, especially with emergent work such as participatory grantmaking.²³

Be transparent about power, be proactive about soliciting feedback

A Group member shared their hope that more people in power will work to “realize they’re not

²² Villanueva, E. *Decolonizing Wealth: Indigenous Wisdom to Heal Divides and Restore Balance*. Berrett-Koehler Publishers, 2018.

²³ Weijs, M., 2017. “Dealing with power relations in participatory grant-making.” FundAction. <https://medium.com/@FundAction/dealing-with-power-relations-in-participatory-grant-making-8cb82a2832d9>

the best people to make the decisions.” This is foundational to participatory grantmaking processes. As a family, letting go of your power will be the foundation of much of your work. And much of the work of making power transparent will fall to the family or the proxy for the family.

With The Share Fund, Vivian and the Phīla team were vigilant in watching for potential power dynamics in meetings. Over the months, and after a few tweaks of the facilitation approach that included incorporating co-facilitation, they found a balance that worked for them. Some Group members also admit it took them a while to trust that Bill and Holly had completely given them control. It would be wise for families to remember that there is an inherent power dynamic in wealth and philanthropy. Even as individuals commit to working together to implement a model that interrogates that dynamic, they still come with their own lived experiences, assumptions, biases, and projections. So as much as the family can, they should reconfirm their commitment to the process, allow ample time for all parties to build trust amongst each other, and commit to learning alongside one another.

Families should actively and regularly solicit feedback and be prepared to change parts of the process that don't align with their participatory grantmaking vision. For example, one of the first moments for critical engagement around power was the Conflict of Interest statement. The Design Group took a big risk with the Marklyns early in the process by stating that the Conflict of Interest was a colonial construct. Although unfamiliar with this perspective, the Marklyns remained curious about the Group's approach, which was to create a Community Trust and Transparency Agreement. Ultimately, this established an even deeper engagement for the Group because they could put in their own words their experiences and approaches working in community. And the Marklyns learned alongside them that equity requires an active engagement with the entire context of a process.

Trust the process, trust the participants

After the first meeting in which the Marklyns introduced themselves, they didn't meet regularly with the Design Group. They intentionally avoided interactions that would influence the Group's direction. Bill shared that he knew going in, there would be “so much power behind our suggestions.” So they gave the Group plenty of space to own the entire process. As previously mentioned, the Marklyns also worked with Vivian and Phīla to find the sweet spot of sharing their thoughts without it seeming like a mandate. And the Marklyns were clear from the outset that they would fund whoever the Design Group decided on, regardless of their opinions.

There were many moments the Marklyns could have exerted their influence by claiming the process was taking too long, costing too much, feeling too murky, or not aligning (yet) with their vision. But Holly expressed, “the fundamental piece of rethinking philanthropy is how to have more trust.” So even when it felt challenging or uncertain, the Marklyns chose to trust the participants and their process, recognizing it as fundamental to participatory

grantmaking overall. Families should work to actively trust from the beginning of the relationship. Once you have communicated your values and offered over the process to participants, it's crucial to continue to work actively to trust them, especially in moments that have you questioning the group's direction. It can be important to engage in conversation about the how and why of their process, but as the Marklyns learned, it is equally important to be careful not to come in with recommendations. A facilitated conversation can help if you would like to have a discussion with participants. But before you do, ask yourself why — is it your discomfort, or is there something you are genuinely curious about?

Group

Recruit with equity in mind

The Share Fund's recruitment approach for the Design Group was driven through network outreach. Although the Marklyns offered some parameters, they didn't suggest the candidates, didn't interview them, and weren't involved in deciding who to invite. The Phila team managed the recruitment process, keeping Bill and Holly's vision in mind. It is therefore worth considering hiring advisory services if your family establishes a similar recruitment strategy.

However, if your family wants to recruit on your own, you can start with community leaders you know from across industries who have lived experience, an analysis of systemic inequities, and a track record of working alongside the community. Come prepared with an overview of your ideal grantmaking program. The Overview of The Share Fund (see Appendix A) may be a useful resource to help create your own. The overview should introduce the family's vision, outline the ideal grantmaking process, and offer a detailed role description with a timeline. Ask for a list of potential community members from their deep network of connections. There's also a benefit to expanding beyond your usual network for diverse community voices. Connecting with a broader community can provide insights that will help shape your funding process in bold ways that you may not have been able to imagine.

Keep your focus on finding equity-minded, committed individuals who will bring their unique perspective and skill set to your grantmaking approach. Creating a group is equal parts diligence, intention, and magic. Some individuals look great on paper but may not gel in a group setting. So when you are meeting potential members, ask yourself questions that serve your core vision of leveraging participatory grantmaking as a vehicle for shifting power. Is the individual relationship-focused? Is the person flexible and open to uncertainty? Participatory grantmaking is most effective when trust and relationship are central. Has the person grappled honestly with power, or are they willing to? Is their leadership and communication style informed by individualism or by decolonized forms of leadership more likely cultivated in BIPOC communities? This last question is important, but given a donor family's background and implicit biases, they may not be the best ones to assess this. So an equity-based advisor

or consultant can guide you.

There is no perfect assessment of an individual. We all have assumptions and biases. But if you are hesitant that they don't seem to align with others involved in recruitment (like other family members or consultants), then sit with those concerns honestly. Is it about your discomfort with what the person brings to the group? Are they explicit about their commitment to dismantling structures of power and oppression? Have they asked questions about your family's wealth that made you uncomfortable? These feelings go back to the first section on tips for the family: Keep learning, keep growing, and find support when you are grappling with letting go of power. Be open to a diversity of experiences and expertise. Many community leaders doing transformative work may not have degrees or professional titles, but their community respects them. These are the people that will honor your core values and shape your grantmaking with integrity and transparency.

Invest in administration and facilitation

Participatory grantmaking requires a lot of financial investment. For the process to be sustainable, at least initially, it needs ongoing administrative support and experienced facilitation support. Since the purpose of participatory grantmaking is to center community members and shift power, it is up to the family to minimize any additional burdens that could pull the group members away from their role of designing an equitable grantmaking process. The Marklyns invested heavily early on for consultation to organize and facilitate meetings, write up minutes, check in with Group members about tasks like writing letters and creating the website, and to offer administrative support for the Grantees.

Vivian was essential to creating a trusting environment where everyone felt affirmed and secure despite the virtual setting. For example, she started by asking an opening question each meeting so Group members could get to know each other more personally. As the meetings went on, Vivian skillfully drew out their ideas and began to enlist them as co-facilitators to slowly cede her role in leading the meetings, giving them greater agency in their outcomes. By investing in a skilled facilitator and working closely with them to understand group dynamics and how they can help steward relationship building, you can establish a foundation for group cohesion.

The facilitator should flexibly guide collaboration, affirm conflict as part of the process, and be aware of communication dynamics. Vivian did not have philanthropy facilitation experience, which felt like a strength because she didn't come in with preconceived notions of how the funding design should go. She was chosen for her ability to sense a group's dynamics and hold space for nuance and contradiction. As she shared, she "focused early on a level of equal voices" within the Group and worked to ensure that "a level of respect was ever present, even through the frustration" that is often part of an emergent and ambiguous process. So finding a skilled facilitator is an investment in relationship building. As Vivian said, the facilitator role is a "mix of compassion, listening, humanity, and taskmaster." A resource

for potential facilitators of participatory grantmaking processes is *The Facilitator's Guide to Participatory Decision-Making* by Lenny Lind and Sam Kaner. With any guide, however, there is a possibility that the facilitator could get prescriptive. It is more important that the facilitator is someone who can hold the complexities of feelings that a participatory process may bring up while finding collaborative openings for a group to work creatively.

Prioritize ongoing relationship building

The Share Fund recruited and convened five individuals across Washington state. They didn't know each other, yet they were expected to step into a vulnerable process of sharing and defining values to create an equity-aligned funding approach. Therefore, it was necessary to first focus on relationship building to establish trust and intimacy. The Share Fund held their meetings virtually because of safety protocols during the COVID-19 pandemic. So many traditional relationship-building options, such as all-day retreats, in-person icebreakers, or meals, were unavailable. This made relationship building challenging but not impossible.

Families should also provide opportunities for relationship building early and often. For the Marklyns, it was important that they weren't seen as influencing the grantmaking design and decision-making process, which is why they consciously chose not to attend meetings. But both the Marklyns and the Phila team made it clear that any Group member could reach out to Bill and Holly anytime. And in September 2021, the Marklyns held an in-person outdoor gathering for The Share Fund Group at their home. This meal helped one member in particular feel less guarded and more connected with the Marklyns and their vision.

Provide ample opportunity for your group members to interact with you, and continue to find points of relationship building that show these members that while they're investing in your vision, you're also investing in their connection.

Elevate equity in the process

Offer initial opportunities for the group to communicate their equity values and work together to find common overlap. The Share Fund found the stipend conversation to be that opportunity. That conversation was a proxy for the bigger conversations the Group would have about creating a participatory process and a grantmaking strategy that integrated gender and racial equity. By investing time in discussions about how to exemplify equity in their stipends, they grappled in real time with the complexities of racial and gender equity and learned about each other's commitment to the vision. It was an organic moment of building trust.

Building lower-risk engagements into the process might be challenging or time-consuming, but they are necessary. Systemic inequity impacts everything from where you are having meetings and how long folks have to travel to get there, to the digital software you use to create grantmaking materials. Going through a group process with any of these potential discussions can be beneficial for the group's cohesion, as they can collectively explore how

to collaborate mindfully when faced with an inequity. There are many ways to address inequity in a process, and each group is unique. You must be transparent that equity — and by extension, interrogating power in philanthropy — is a foundational part of your participatory grantmaking model.

In participatory grantmaking, the process is just as important, if not more important, than the end product of granting out the money. If your group could not critically shift how you give, that requires reflection. Where did the focus on equity and shifting power slip away? And what pulled them away from it?

Provide adequate compensation for committee members

The community members you are most likely to recruit are often asked to lend their time and advice for free. They have chosen to commit to your process, which is great! But there are probably three to five other ways, at minimum, that they could use those hours they spend with your family and your grants process. It is a challenging balance for a family to hand over power without creating an additional burden. In order to appreciate and uplift your group members' vital expertise and voice, think critically about compensation. There are several ways you can do it. Would you want to pay them hourly? Or a set stipend? Be clear about how much you can commit financially to their work — because it is work.

Listen thoughtfully if your members have feedback about the approach or the amount of compensation. Is the compensation method convenient for them, or are you having them fill out additional forms? Is it divided over the time they work with you, so they receive regular compensation instead of one lump sum at the end? You can express your ongoing gratitude through other ways as well — direct appreciation, highlighting their work on your websites, connecting them to colleagues and peers you know who may also want to work with them in the future. But monetary compensation is the most consistent suggestion when discussing participatory grantmaking, from the Input Group to practitioners interviewed for this guide from online listservs. Clarify compensation even before you recruit because it signals you recognize and respect the time and expertise your potential Group members are offering you.

It will take more time than you expect—be flexible and transparent

When The Share Fund first established their timeline, they hoped to make Grantee selections in early fall. However, they ultimately made the Grantee selections in late fall. The timeline shifted because the Group spent many of the spring meetings on relationship building and reflecting on the process. Equity is about the process, not the product. Building out a participatory grantmaking program centering equity and the community members most at the margins of power in philanthropy may take more time than you expect. But there are also impacts to extending timelines. For The Share Fund, it meant less time and, therefore, more urgency in December as they worked to reach Grantees and process their grants before the end of the fiscal year.

Address your willingness to shift timelines early, either before or in the first meeting, and discuss potential impacts. This shows your willingness to be flexible to a group working to build their trust with you, a family with power and wealth. However, it is also important to set expectations and clarify you would not want the group to invest extra time indefinitely, as that would quickly become a burden. By being transparent early on, you are not only building trust but also ensuring that the direction you go in the participatory process will allow room for dialogue, feedback, and learning. By acknowledging you are understanding of shifting timelines, group members will feel less pressure to get things done just to get them done. It will open up more room for the group to engage in a participatory process aligned with their collective values.

There are no failures, only learnings

Many who were involved in the process shared that they came in with an excitement to be a part of something novel, which meant they were also embracing the potential for failure that is inherent in trying something new. The prospect of failure may feel scary. White supremacist social and cultural norms have trained us to avoid it at all costs. The beauty of participatory grantmaking is that one goes in prepared for failure, growth, and change — all of which are prerequisites to the endeavor. One Design Group member shared their initial understanding of what they had signed up for: “This is the first time and we might make mistakes and it’s okay to make mistakes.”

Although families may be unfamiliar with this approach, learning alongside the committee will exemplify your commitment to shifting power in philanthropy. Affirm the imagination and risk-taking inherent in a participatory grantmaking process. Stay curious about some of the challenging moments in the process, and let that guide you to further refine your values. This will help you commit even further in your vision to center communities most impacted by inequity.

Grantees

Alleviate burdens for grantees

Only half of the 2021 The Share Fund Grantees were nonprofits. The other half of the Grantees were 501(c)(4)s, LLCs, and individuals. Choosing to grant to smaller, less-resourced groups highlighted burdens that the Design Group worked to alleviate. The Design Group removed barriers in the application process by doing their own research to recommend Grantees. The Share Fund also did not have a grant reporting requirement, instead using a trust-based approach. They trusted that a Grantee would use the general operating funds in the best way for their work (see Appendix G, “2021 Grantee Award Letter”).

Thinking proactively about your grantee’s needs is another place for you to practice equity. For example, you may have to figure out how to disburse funds to an organization that doesn’t have a bank account or translate your forms to languages other than English. These practices signal to your grantees that they are being respected and seen in the work they’re doing, just as they are.

There should be no push to change their model if it works for their community. However, if they ask for support or advice, it can be an opening for the family to support their vision, either by offering capacity building or mentorship. You can provide fiscal sponsorship or commit to funding grantees regardless of nonprofit status (talk to your legal and financial team regarding this option). Don’t make assumptions about what a group may need; when in doubt, ask, and be prepared to offer.

Recognize grantee investment in your vision

Grantees know intimately what works and what doesn’t in the grantmaking process. They will support your vision of grantmaking if it thoughtfully considers power dynamics and centers their experiences. So be transparent to grantees about your process. Share with them how you arrived at your decisions, your commitment to shifting grantmaking, and your openness to feedback. As with many initial grantee interactions, they may express mostly gratitude and agreement. But stay in relationship with grantees after the grant is made, and reiterate you are open to their feedback; decouple any implications that feedback could impact their future funding. By establishing a long-term relationship with grantees, you will gain more nuanced knowledge about the joys and struggles in their community work, what works and what doesn’t, and other community groups they could connect you to. This will strengthen your participatory processes and your equitable grantmaking in the long term.

The Share Fund

Conclusion

The Share Fund imagined this guide as a resource for family giving to step boldly into more equitable practices. As with considering anything new, the first step is often learning more. We hope the experience of The Share Fund provides much to reflect on, through the history, the case study, and the resulting outcomes of their first transformative year. Participatory grantmaking is an intentional practice that, when given adequate time, reflection, and resources, can be a powerful foundation for a family to enact equity in their giving.

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Estakio Beltran
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Bridgette Hempstead
Elisheba Johnson
Rashad Norris

Philanthropic Advisors and Project Managers

Stephanie Ellis Smith, Phila Engaged Giving
Lauren Janus, Phila Engaged Giving
Claudia DeCasas, Phila Engaged Giving

The Share Fund Facilitator

Vivian Phillips

Financial Professionals

Keith Beverly, Re-Envision Wealth
Kamila Elliott, Collective Wealth Partners

Report Writer

Ami Patel

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Copy Editor

Nadia Q. Ahmad

Designers

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Lee Anderson

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Investments & Equity

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A thorough guide providing a definition of racial equity investing, case studies, and possibilities for implementation.

Adeyanju, Deborah. "Racial Equity Investing: What It Is And Why It Matters." *Re-Envision Wealth*, 2021, grid202partners.com/blog/racial-equity-investing-what-it-is-and-why-it-matters

A concise blog post highlighting racial equity investing strategies.

Bengabsia, Essma. *Racial Equity Investing: Opportunities for Impact & Alpha*. 2020, missioninvestors.org/sites/default/files/resources/Racial_Equity_Investing_Full_Primer%20%281%29.pdf

Explores the historical impacts of inequitable capital allocation, case studies, and guiding questions for investors. Feels more investment professional-centered.

Foundational Resources for Community-Centric Philanthropy

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Considered by many as the first comprehensive guide to participatory grantmaking. Sections are interspersed with visual diagrams. Also included are first-person insights from participants and potential challenges to look out for in the model.

Gibson, Cynthia. *Participatory Grantmaking: Has Its Time Come?* Ford Foundation, 2017, participatorygrantmaking.issuelab.org/resource/participatory-grantmaking-has-its-time-come.html

A Ford Foundation-commissioned report with a landscape scan of how participatory processes are being integrated in philanthropy. Gibson also shares lessons from

outside philanthropy that could be useful for families as they are implementing participatory grantmaking.

Paterson, Hannah. *Grassroots Grantmaking: Embedding Participatory Approaches in Funding*. Winston Churchill Memorial Trust, 2020, <https://hannahpatersoncom.files.wordpress.com/2020/11/grassroots-grantmaking-embedding-participatory-approaches-in-funding.pdf>

A visually engaging report comprising learnings from a yearlong fellowship exploring global participatory processes. Paterson discusses decentering power, grassroots organizing, and relationship building.

Books on Wealth, Power, and Transforming Philanthropy

Villanueva, Edgar. *Decolonizing Wealth: Indigenous Wisdom to Heal Divides and Restore Balance*. Berrett-Koehler Publishers, 2018

Written by an Indigenous philanthropy professional who articulates how philanthropy perpetuates colonial systems of oppression and exclusion; offers funders a path for healing and radically shifting the sector.

Wrobel, Ben, and Meg Massey. *Letting Go: How Philanthropists and Impact Investors Can Do the Most Good by Giving Up Control*. 2021

Discusses the limitations of “billionaire philanthropy” and advocates for those with wealth to let go of power and support participatory processes.

Giridharadas, Anand. *Winners Take All: The Elite Charade of Changing the World*. Knopf, 2019.

A journalist’s examination of how wealthy donors are complicit in perpetuating injustice and inequity by their funding priorities, with a focus on equitable funding through the public sector.

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Hart, Matthew, et al. *Who Decides? How Participatory Grantmaking Benefits Donors, Communities and Movements*. The Lafayette Practice, 2014, www.thelafayettepractice.com/wp-content/uploads/2014/04/Lafayette-Report.pdf

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Hodgson, Jenny, and Anna Pond. *How Community Philanthropy Shifts Power: What Donors Can Do to Help Make That Happen*. Grantcraft, 2018, www.issuelab.org/resources/30193/30193.pdf

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A Q&A-style article addressing introductory considerations for participatory grant-making, with additional linked sources.

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Written in a Q&A format for donors seeking to shift their grantmaking practices to share decision-making power.

Paterson, Hannah, and Katy Love. “Participatory Grantmaking: It Can Be Done — Here’s How.” *Alliance Magazine*, 2022, www.alliancemagazine.org/blog/participatory-grantmaking-it-can-be-done-heres-how/

Interview-style blog post between two participatory grantmaking practitioners discussing the nuances of facilitating a collective process.

Curated Content Series

- Candid Learning for Funders. learningforfunders.candid.org/content-series/participatory-grantmaking/
- Participatory Grantmakers Community. www.participatorygrantmaking.org/
- Participatory Grantmaking Community YouTube Channel. www.youtube.com/user/HannahPwelfare/videos
- Subscribe to a Participatory Grantmaking Community Listserv. www.participatorygrantmaking.org/about#join-us

Appendix Summary

The appendix comprises forms and materials from The Share Fund's first year of operation. These forms helped align The Share Fund's vision with its implementation.

They are being offered here in the good faith that families will create their own set of forms and materials that will best support their unique participatory grantmaking approach.

Appendix A: Overview of The Share Fund

Phila shared this overview with community leaders to receive feedback on the initial vision. They also used it as an opening to ask for possible members to join.

Appendix B: The Share Fund Roles and Responsibilities

The document sent to individuals interested in joining the Funding Committee.

Appendix C: Community Trust and Transparency Agreement

The Design Group's collectively written statement in lieu of a conflict of interest policy.

Appendix D: Design Group Letter of Commitment to the Marklyns

The Design Group's letter to the Marklyns outlining their commitment to the Marklyns' vision for The Share Fund.

Appendix E: The Marklyn's Letter of Commitment

An introductory letter to the newly assembled Design Group outlining the Marklyn's vision and goals for The Share Fund.

Appendix F: Potential Grantee Conversation Template

A template for gathering information from grantee conversations in lieu of a formal interview process.

Appendix G: 2021 Grantee Award Letter

First-year Grantee letter detailing general operating grant along with the additional Opportunity Fund grant supporting Grantee well-being.

Appendix A

Overview of The Share Fund

The Share Fund

Share the wealth, share the power

“If you have come here to help me, you are wasting your time. But if you have come because your liberation is bound up with mine, then let us work together.”

– Lilla Watson, Aboriginal activist and artist

Overview of The Share Fund

About Us

We are Bill and Holly Marklyn. We live in Seattle, where we raised our three children and are active community members. As white, educated, early employees of Microsoft, we are keenly aware of our privilege and have embarked on a journey to redistribute our wealth back into society in a socially just manner. It has been said that with great power comes great responsibility. We believe the same is true for wealth. Current levels of wealth and income inequality are unjust and, as wealthy privileged citizens, we consider it our responsibility to help change the systems that create these inequalities and to provide relief to those most harmed.

The Share Fund

The Share Fund is the collective implementation of our giving, focused on racial and gender equity and comprised of charitable giving, socially responsible investing, and political giving. Where possible, we will use the framework of [Targeted Universalism](#) to direct our philanthropy, choosing organizations that serve the populations most severely impacted in our areas of focus. And we will invest power in organizations on the ground—particularly those led by women and people of color—to do the work they need to do.

We favor large-scale systems change over direct relief. We believe in funding projects even if they carry a risk of failure, because innovative solutions often involve trial and error. We believe that initiating change, however imperfect, is better than waiting for a perfect solution.

Lastly, we recognize that those involved in the communities we wish to serve are the most qualified to make judgments and decisions regarding their communities. As such, we have decided to use **Participatory Grantmaking (PGM)** for our giving. PGM is a relatively new method for ceding decision-making power to the communities that a funder aims to serve.

How It Will Work

The Share Fund will convene a **Funding Committee** made up of BIPOC community members to implement our grantmaking program. In order to step out of traditional power structures of donor control, we will supply the funds, the Funding Committee will determine their distribution.

Initially, The Share Fund will distribute about \$500,000 per year. This amount will increase over time. The Fund will award grants to organizations focused on social and economic justice, and racial and gender equity in the United States. Grants will be made to 501c3 and 501c4 nonprofits, as well as political leaders, individuals and organizations, as decided by the Funding Committee.

We are very excited to embark upon this project and welcome questions, which can be e-mailed to Lauren Janus at Phila Engaged Giving (lauren@philagiving.com).

Appendix B

The Share Fund Roles and Responsibilities

The Share Fund

Share the wealth, share the power

“If you have come here to help me, you are wasting your time. But if you have come because your liberation is bound up with mine, then let us work together.”

– Lilla Watson, Aboriginal activist and artist

Roles and Responsibilities of the Funding Committee

The Share Fund’s full Funding Committee will convene in mid-2021 to implement the grantmaking model set out by the Design Group. Given that the Design Group will have full control over recruiting and selecting Funding Committee members, below is simply a starting point for the Design Team to use in finding appropriate members to fill out the Funding Committee.

Funding Committee Roles and Responsibilities

Committee members should expect to:

- Work as a team to evaluate applications and award yearly grants. Members will assess focus areas under the broader heading of “social and economic justice, racial and gender equity” and determine where to direct funds for that year.
- Be open to learning and adapting as we go through this process. Participatory Grantmaking (PGM) is a relatively new area of philanthropy and there’s no agreed upon “best practice”. We will all be learning and will need to make adjustments as we go along, appreciating that this is new territory for us as grant-makers.
- Be committed to attending a limited number of meetings, plus some independent grant review time. We request your full commitment because we will be relying on your perspective and expertise. We in turn will respect your time and energy, and provide compensation for your work.
- Be committed to integrity in all aspects of the grantmaking process. We wish to operate with respect, honesty, open-mindedness, and professionalism.
- Sign a Conflict of Interest Policy and a contract for your work.

Funding Committee Recruitment Criteria

We anticipate a nine-member Funding Committee dedicated to social and economic justice, and racial and gender equity. Ideally, the Funding Committee will represent a diversity of backgrounds, experiences, and demographics, specifically:

- Experience: Direct involvement in organizations working on issues of racial and gender equity, as well as broader community experience such as journalism, education, politics, etc.
- Areas of Expertise: Representational expertise within the committee across areas such as maternal health, education, arts, economic, and environmental justice, etc.
- Age: Young members relatively new to activism and fundraising, as well as more experienced leaders
- Locale: Eastern, Central and Western Washington, with the possible addition of national or other states in later years
- Race: BIPOC members with a diversity of lived experiences
- Gender: Open to all, but the majority should identify as women

Additionally, we seek members who are/have:

- Demonstrated passion and commitment to racial/gender equity work.
- Open-minded with a willingness (even eagerness) to learn about issues and organizations before jumping to conclusions or established beliefs.
- Flexible, comfortable with ambiguity, and committed to the process of PGM, which is currently more of an art than a science.
- Dependable, committed, and experienced in working within a diverse, egalitarian team to plan and make decisions.
- Committed to open, transparent processes, and sharing of PGM lessons learned.
- We will work hard to schedule meetings at a time convenient for everyone, and have hired Vivian Phillips to be the facilitator keeping the meetings on track and on time.

Benefits to all members of the Funding Committee

- The opportunity to be in the vanguard of the PGM movement, learning and adapting your methods along the way.
- The chance to be part of a team that has full autonomy to develop and drive this process of putting funds in the hands of people and organizations who need it most.

- An expanded network of activists and grant-makers from within Washington state and around the country.
- The opportunity to learn about and direct needed funds to organizations working in the areas of social and economic justice, and racial and gender equity.
- Compensation for your time and expertise.

We are very excited to embark upon this project and welcome questions, which can be emailed to Lauren Janus at Phila Engaged Giving.

Appendix C

Community Trust and Transparency Agreement



The Share Fund Design Group Community Trust and Transparency Policy

Purpose

The Share Fund welcomes members of the Design Group to exercise substantial influence over grants decisions and financial allocations. The service of a Design Group member is intended to illustrate the ability of a community-based decision-making body to have greater influence over the distribution of funds in support of racial and gender equity. In this service, the Design Group adopts a policy of trust and transparency in order to maintain the highest level of integrity within the group and in the grant-making process.

This policy is built on the following agreements:

- **Trust** – each member operates with a high degree of trust among members. This means that real or perceived conflicts are fully disclosed and offered for discussion. Each member trusts that all fellow members are honest and truthful in their actions and decision-making.
- **Integrity** – each member agrees to employ their highest degree of personal integrity in decision-making. Should a member experience any real or considered impairment in making decisions, the member will disclose this conflict for resolution with the group.
- **Transparency** – full transparency is encouraged and welcomed, meaning that all members will openly share connections and affiliations to any potential grantee. Connections and affiliations are defined as family members, business partners, personal financial interests, or relationships that may result in influence over grantees use of grant funds.
- **Full Disclosure** – the spirit of this agreement is one intended to engender a collaborative working environment where full disclosure is representative of the group's personality.
- **Violation of agreements** – the group agrees to internally resolve and agree upon any methods of sanction should a member be found to be in violation of this agreement.

Because committee members may be involved in other organizations that may have business dealings or affiliations with or seek grants from the Fund, the following general principles have been agreed upon

- Each committee member will maintain the highest level of ethical conduct and will exercise the highest standard of care, diligence, and prudence when conducting any activity on behalf of The Share Fund.
- In the event any committee member, or a member of their immediate family has a personal or business interest in, or is involved in any way with, an organization with whom the Fund is considering a grant request or business contract, such interest or involvement will be disclosed to the Design Group. In such an event, any committee member may answer pertinent questions of other committee members when knowledge regarding the matter will assist the Fund.
- The meeting notes will indicate that the interested committee member disclosed the interest or involvement in the matter being considered by the Committee and performed all requested actions as directed by the Committee.

I HAVE READ AND UNDERSTAND THE COMMUNITY TRUST AND TRANSPARENCY POLICY. I AGREE TO ITS TERMS, AND MY ACTIONS HAVE BEEN AND WILL CONTINUE TO BE GUIDED BY THIS POLICY .

Verbally agreed to by The Share Fund Design Group members

April 15, 2021

Estakio Beltran

Karla Brollier

Bridgette Hempstead

Elisheba Johnson

Rashad Norris

Appendix D

Design Group Letter of Commitment to the Marklyns



Letter of Commitment from The Share Fund Committee to Bill and Holly Marklyn

March 18, 2021

We, the five-member Funding Committee of The Share Fund, acknowledge and thank Bill and Holly Marklyn for the “Letter of Commitment” sent to us in January 2021.

We recognize and appreciate that the purpose of the work of The Share Fund is to put funds into the hands of those addressing racial and gender inequity in our society. We also appreciate that in distributing those funds through a participatory grantmaking process, we’re building a model for a more equitable practice of philanthropy. We are intentionally working toward dismantling white supremacy in philanthropy by shifting the power dynamic, and we are proud to be part of this work.

Throughout this process, we commit to being learners and adapting our work as needed. As a team, we will develop our own ways of working, recognizing the importance of our individual voices in our collective decisions. We will expect integrity and transparency of each other in all aspects of this work.

We look forward to embarking on this work together.

The Share Fund Funding Committee members:

Estakio Beltran

Karla Brollier

Bridgette Hempstead

Elisheba Johnson

Rashad Norris

Appendix E

The Marklyn's Letter of Commitment



The Marklyn's Letter of Commitment

Dear Committee Members:

Thank you so much for joining us on this philanthropic journey, we're looking forward to meeting all of you in person soon. In particular, thank you for being willing to give your time to this project – we know everyone is busy at the best of times, and these are far from the best of times, so we very much appreciate your participation. When Stephanie and Lauren told us about who had been selected for the Design Committee, we couldn't have been happier. You each bring such a wealth of knowledge and experience to the process that we know we will be starting off in very good hands!

Since we know all of you will have received our Giving Plan and Share Fund documents, we wanted to focus a moment here on the specifics of our new, as yet undefined, grantmaking process. We are so excited to start down this path with each of you towards greater equity in philanthropy, and are curious and hopeful about where it will take us.

We have two main goals for this effort. The primary purpose is to put funds into the hands of those who are working to address racial and gender inequity in our society. But in distributing those funds, we also wish to find better, more equitable ways to engage in philanthropy. This, to us, means shifting power and decision-making to those more directly connected to the work.

In this participatory grantmaking process, we commit to you our curiosity and open-mindedness, our enthusiastic support of your decisions, and our integrity. Our intent is to be observers and supporters of the process, making no decisions, but being available to answer any and all questions or concerns you may have.

In return, we look forward to learning from all of you, gaining greater insight into the issues and challenges faced, as well as learning more about the amazing people and organizations doing work to better our society. This will make us not only better, more knowledgeable individual funders, but will also help us to advocate for more equitable ways of giving in the larger philanthropic community.

Let us begin!

Holly & Bill Marklyn

Appendix F

Potential Grantee Conversation Template



Potential Grantee Conversation Template

Purpose: To provide questions members of the Funding Committee could ask of potential Share Fund grantees, within the context of a casual conversation.

The purpose of these conversations is not to “interview” potential grantees. Instead, the intent is to engage them in a humble, relationship-building discussion that can help the Funding Committee member to decide whether or not to nominate the individual or group for a 2021 Share Fund grant.

These questions are neither exhaustive nor mandatory. At the end of the conversation process, the Funding Committee member will share the completed templates with the rest of the Committee for use in making final grant decisions.

Funding Committee Member	
Name of Organization	
Date of Conversation	

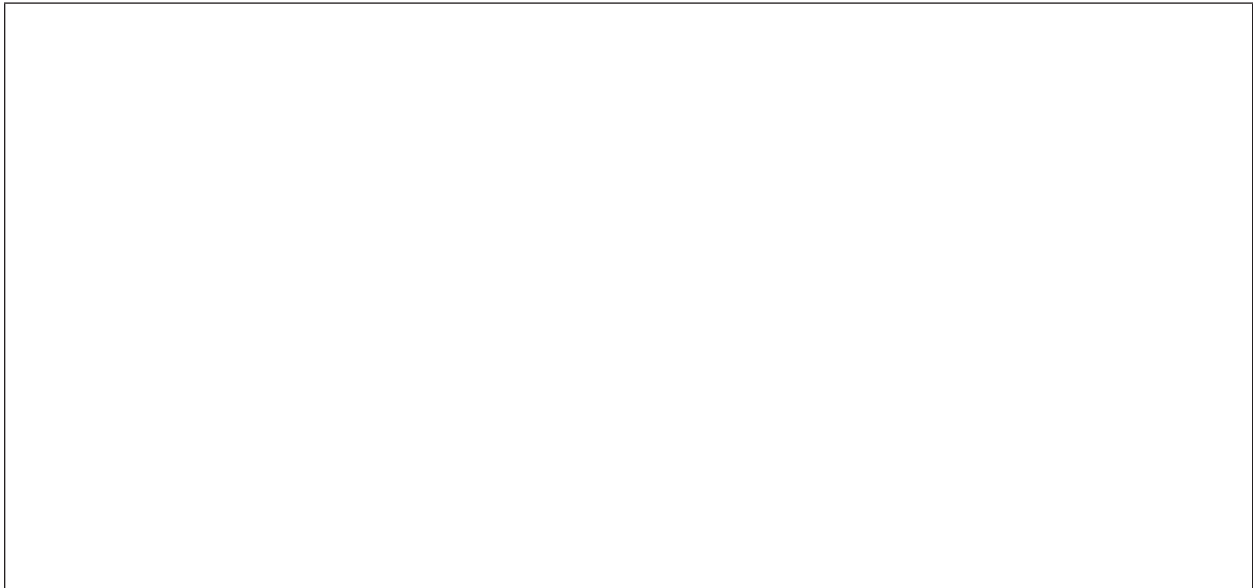
Information gathered from online research:

1. Who does the organization serve?

2. What is the organization’s mission statement?

Questions to ask through conversation (again, you may not need to ask all questions):

- What percentage of your leadership team identifies as female?
- How many members of your leadership team are persons of color?
- What is your dream project, and what is the greatest obstacle you face in achieving it?
- Can you talk a bit about your mission statement? What problem does it seek to solve? Have you made any adjustments to your mission statement or the way you work over the past year?
- What is the best meal you've ever had, and why?
- Is there any additional information you'd like to share?



Appendix G

2021 Grantee Award Letter



NAME

ORGANIZATION

ADDRESS

DATE

Dear GRANTEE:

It is our pleasure to inform you that ORGANIZATION has been chosen by The Share Fund Funding Committee to receive an unconditional, unrestricted general operating grant of \$XXX in support of your work furthering racial and gender justice in Washington State.

The Share Fund is a new grantmaking organization in Washington state, which operates using a participatory grantmaking model. While the financial support for the Fund comes from a Seattle couple, funding decisions are made by a five-member, Washington state-based BIPOC Funding Committee. All members of the Funding Committee agreed that you at ORGANIZATION are doing invaluable work in our community. We wish to honor and support you with this funding.

While we recognize the importance of financial support to your work, we also believe strongly in supporting you --the leader who gives your skills, passion and so much more to furthering racial and gender justice in our state.

That's why we're enclosing an additional \$3,000 for you from our Opportunity Fund, a fund we created in recognition that small nonprofits are often responsible for solving big issues that can take a toll on staff. As a group of BIPOC individuals, we know too well the tendency to ignore our own needs in favor of those around us. That's why we are giving you this additional money with the express request that you spend it in ways that benefit the health, aspirations and broader wellbeing of you and your team.

Here are some examples of ways you might choose to spend the money from The Share Fund Opportunity Fund:

- Conference fees
- Childcare/babysitters
- Personal, health or professional coaching

- Fitness classes
- Courses on any subject
- Books on any topic
- Massages
- Meals
- Healthy snacks
- Coffee with a colleague
- Ergonomic office equipment

While there is no requirement that you report back to us on how you used your \$XXXX in grant money, it is our hope that you will share with us something about how you spend the money from the Opportunity Fund. We would love to see a picture of you enjoying a meal with a friend or showing off your new dance moves--anything, really!

When you do book that needed massage or take your team to see some live music, we recommend you join us in supporting BIPOC-owned businesses. Some of us like finding new local business at The Intentionalist (<https://intentionalist.com/>).

Finally, if you would like, we'd love to receive a brief quote, picture or recording related to your work that we could share on our website at www.thesharefund.org. This is entirely optional, however, as we know you have many demands on your time. You can email anything you'd like to share--or any questions you have--to Lauren Janus at info@thesharefund.org. You could also call us at 206-487-4300.

Thank you for the work you do in our community. We at The Share Fund want you to know that we see you, and we value you.

In gratitude,

The Share Fund Funding Committee:

Estakio Beltran

Karla Brollier

Bridgette Hempstead

Elisheba Johnson

Rashad Norris

