P4HE Workshops – Moving to Action:
Better Health for All

PARTNERS for ADVANCING HEALTH EQUITY

How to Use this Resource

This resource provides examples of power-sharing practices in philanthropy aimed at achieving health equity. Use this resource to incorporate these practices into your philanthropic efforts to promote better health for all.

For more context on philanthropy and health equity

To get the most out of this resource, Partners for Advancing Health Equity (P4HE Collaborative) recommends reviewing the level-setting resources provided to participants during the workshop sprint. For more background information on philanthropy and health equity, see *Approaches for Health Equity: Better Health for All*.

Level Setting

New to the intersection of philanthropy and health equity? Below are level-setting resources recommended by the workshop facilitators.

Read

› Case Study: Headwaters Foundation - Redefining How Philanthropies Evaluate
› Trust-Based Evaluation: Honoring Community Wisdom
› A Journey from Traditional Grantmaking to Trust-Based Philanthropy
› Trust-Based Philanthropy is Grounded in Mutual Accountability and Learning
› Practicing Trust-Based Philanthropy
› The Origins of Trust-Based Philanthropy: An Interview with Pia Infante

Listen

› Trust-Based Philanthropy Resources
› The Future is Trust-Based

Watch

› What is trust-based philanthropy?
› "In the Right Hands" Documentary

Workshop Focus

The Partners for Advancing Health Equity Collaborative partnered with Grantmakers In Health (GIH) to host a three series workshop sprint on health equity, community engagement, and power sharing in philanthropy. GIH is a national nonprofit educational organization dedicated to improving the health of all people.

› **Session 1** speakers introduced trust-based philanthropy as a tool to make grantmaking more equitable. Speakers included Jill Miller, president and CEO of Bethesda Inc. and the bi3 fund, and Erin Switalski, program director at the Headwaters Foundation.

› **Session 2** speakers discussed organizational practices to meaningfully engage communities. Speakers included Earl Lui, managing director at The California Wellness Foundation; Nikki Highsmith Vernick, president and CEO at the Horizon Foundation; and Kenitra Fokwa Kengne, program director at the Horizon Foundation.

› **Session 3** speakers explored how funders can meaningfully engage with communities. Speakers included Brenda Sharpe, president and CEO at REACH Healthcare Foundation, and Damon Daniel, president and CEO at AdHoc Group Against Crime.

Moving to Action

Below is a summary of the three sessions and an overview of the power sharing and trust-based approaches shared to disrupt traditional philanthropic approaches.

Leveraging Trust-Based Approaches for Equitable Grant-making

"Trust-based philanthropy is a continuous journey. Our environments are constantly changing, the needs of our non-profits are constantly changing, and we need to be constantly examining our practices." - Jill Miller, President and CEO, Bethesda Inc.

› **Continually Examine Practices**

Continually examining practices and structures looking for ways to improve and evolve is crucial to a trust-based approach. It is important that organizations think about more than just hanging values on their walls, but also creating guiding principles around those values. Questions to ask your organization:

- › How are we going to show up?
- › How are we going to use our values every day to create a more equitable organization and community?
- › If this is our vision – what are we going to do to advance health equity?
- › What are our policies?
- › What current policies and procedures may not reflect a trust-based approach?

› **Consider how your organization defines success**

Examine how your organization is measuring success. Shift thinking from a metrics-based approach to a focus on mutual accountability. For funders, this may include:

- › How do we hold ourselves accountable to the values that we uphold as an organization?
- › How do we hold ourselves accountable to earning trust from community?
- › How do we hold ourselves accountable when trying to build power?
- › Are we behaving the way that we want to create the type of relationship and trust that we think is necessary to generate greater change?
- › How will we assess our impact on our grantee and the community at large?
- › What key outcomes do we want to measure?
- › What learnings do we want to capture along the way?
- › How do the things we have chosen to measure align with our overall goals?

This reflection process requires aligning the questions with the expectations of applicants to internal equity goals. Changes to grant process may include questions on the racial demographics of potential grantees board and executive teams such as:

- › What does racial equity mean to our organization?

- › How does racial equity show up in some of the practices in our organization?
- › What does power building mean to your organization?
- › How has your organization contributed toto power building?
- › What trainings have your staff completed?
- › What is your organization doing to address equity now?
- › What are things that given the opportunity your organization would do in the future?

Case Study: Partnering for Effective Measurement

It can be challenging to effectively measure and share the impact of equity work. Particularly when doing work through initiatives such as violence prevention where the alignment between the number of people you may have been able to affect does not directly correlate with a metric such as rates of crime. By collaborating with a research company, AdHoc Group Against Crime was able to better tell their story and establish better evaluation tools. In doing so, they were able to explore these questions:

- › How do we make sure we have something in place to maintain contact withthose we have served?
- › How do we ensure that we are not just moving from one crisis to another?
- › How can we ensure we are responsible and transparent with our funding?
- › How can we communicate the work we are doing?
- › How can we effectively communicate the impact we are having in the community?

Building Organizational Practices for Community Engagement

Trust starts within the organization: between the CEO and the board, and the board and the staff. Staff build relationships with the grant partners, who have the trust of the community. Consider this circle of trust when decisions are being made by asking: *Would these decisions be supported by the community?*

› Acknowledge inherent power dynamics

"I think it's important for us funders to address the elephant in the room and to talk about it and say, 'you know, we recognize we're giving you a grant, but we really want you to lean in and try new things and we want to learn with you. If something does not go right we are not going to pull your funding – we are in this with you.'" - Jill Miller, President and CEO, Bethesda Inc.

Address power dynamics between community partners and foundations by considering:

- › How are we creating unnecessary barriers?
- › How can use available tools differently?
- › How can we better align our funding to indicate value in the work that is being done?
- › How can we provide timely access to supplemental funding for capacity building?

Sharing power requires acknowledgement of inherent power dynamics and reimagining grantmaking practices to make sure they are inclusive and centering trust. Examine internal practices by considering:

> - How do we build more collaborative relationships with our grantees?
> - How can we allow our grantees to be able to take greater risks and lean into innovative strategies?
> - How can we think about the learning to produce more equitable, impactful results?
> - How can we learn more about and better partner with anticipated grantees?
> - How are our expectations aligned with our funding?
> - Are we being transparent about what we do and do not fund?
> - How can we do some of that discovery phase upfront?
> - How can we strengthen relationships and better understand our partners?

Changing how funders communicate with grantees can address power dynamics and build trust. Encouraging grantees to share challenges and successes helps funders provide better support by addressing ongoing obstacles.

"What I learned very early on was I really wasn't speaking the language of the foundation. I didn't really have anyone coaching me through that. It was one of those experiences where I was like, wait a minute I thought that violence is a social determinant of health? I thought that this could be an opportunity. [We were doing the work] but I just didn't have the terminology ." - Damon Daniel, President and CEO, AdHoc Group Against Crime

> ### Foster an organizational shift to power sharing

Mission, vision, values, and all other work from budgets to programs to internal policy have a cascading effect. To truly shift towards power sharing approach, all practices, processes, and culture need to change together.

> - Educate your board on trust-based approaches and how they can lead to greater impacts. This enables them to weigh in strategically.
> - Rather than having review committees and grant cycles, spend time in the community, identifying partners and creating space for people to come to your organization. Provide smaller grants with general operating dollars that can open doors for relationships and foster understanding of what work is ongoing in the communities served by your organization.

> ### Define roles and responsibilities

"As a foundation we are accountable to the communities that we serve – yet there aren't a lot of accountability measures for foundations" – Erin Switalski, Program Director, Headwaters Foundation

Clearly define the roles and expectations of staff, board members, and grantees. Set the expectation of accountability and give the board a role in helping the foundation remain accountable to those goals. Consider how board members are chosen and what their accountability will look like. For

example, a set of skills they wish to acquire, how they will evaluate their work, if they attend meetings and participate in committees, etc.

> For example, at the Headwaters Foundation, the board's role is to provide high-level oversight. They are not involved in day-to-day grant reviews and approvals. This indicates the trust in the staff. For accountability, the foundation staff develop a broad program plan annually that describes grantmaking priorities and staff goals.

Case Study: Building A Culture of Trust from the Ground Up

The Headwaters Foundation had a blank slate at the start. The CEO met with as many community-based organizations and community members as possible to ask:

> What are the issues in your community?
> What should we as a foundation be doing to address Health in in your community?

This community-focused approach informed the strategic framework for the Headwaters Foundation and their focus on the social determinants of health.

Strategizing for Effective Community Engagement

Effectively engaging communities requires consideration about *how communities are currently being engaged.*

› Rebuild trust

Providing supportive spaces where funders are not present can help to rebuild trust and relationships. This starts with acknowledgement of communities and community-based organizations past experiences with funders. For example, there is a lot of warranted fear and lack of trust in the Black community with philanthropy. Decades of experience with unstable funding begs the question: *how long are they going to stick around?*

Listen to grantee and community needs

Ask grantees what they need. This can range from tangible resources and trainings for capacity building to fostering connections and providing communications support.

> For example, the REACH Foundation identified five key consultants with extensive experience and various areas of expertise. The foundation compensates these consultants and connects them with organizations that serve Black communities based on specific needs (e.g., communications support, fund development, accounting, and finance). This approach provided communities access to trusted consultants within the community. The consultants work with organizations to identify their needs and provide recommendations. They then funded those priorities along with opportunities for leadership development, professional growth, and networking. These spaces offered paid opportunities for networking with a structured agenda, which aimed to foster and maintain support networks, friendships, and professional relationships.

› Convene communities and let them take the lead

"We often talk about voices that have ben unheard as voices that were not really asked. They had been systematically excluded. So how could we rebuild that trust in community and rebuild relationships? How can we do thoughtful co-creation between board, staff, and community?" - Nikki Highsmith Vernick, President and CEO, Horizon Foundation

Funders can play a vital role in engaging communities by providing opportunities and spaces for convenings. For example, every first Thursday the Horizon Foundation offers space for a community-led convening. Attendees can engage with their residents and neighbors and talk about issues, challenges, activities, or strategies that they're seeing in the community and how they could potentially work together.

Focus groups with grantees are also a way to learn about what your organization and staff are doing well as well as where things can be improved. Brainstorm ways to listen to grantees and communities through listening sessions, focus groups, telephonic surveys, or door-to-door canvassing, and encourage discussion about the community barriers to living a vibrant, healthy life.

Case Study: Honoring Lived Experience

› The Horizon Foundation provided Halo grants to community partners that allowed them to provide feedback and be compensated for their time. Grantees discuss their organization, their passions, and their challenges. The foundation shares how they align.

› The Headwaters Foundation hosted an event called Voices and Visions in collaboration with the Salish Kootenai College in Montana. The goal of the event was to center community priorities to drive future funding. The event provided an opportunity to hear directly from residents about community health challenges and proposed solutions. The Headwaters Foundation partnered with the Salish County College on a grant to hire a design thinking firm to train a set of community leaders in design thinking. Once trained, they were able to hold a two-day convening during which over 200 attendees, tribal and non-tribal, identified and prioritized what they would like Headwaters to fund. The Headwaters Foundation improved understanding by ceding power and listening to community feedback, funding projects that they otherwise would not have prioritized without community input.

To learn more about these issues, or Partners for Health Equity's calls to action, a resource library including a full recording of this, and all previous P4HE Workshops, can be found on the P4HE