

REPORT: HCF'S PARTICIPATORY GRANTING PILOT PHASE 3

PREPARED FOR

HAMILTON
COMMUNITY
FOUNDATION

PREPARED BY

MELA SWAYZE, PHD
SHIVA MAZROUEI, MA

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EXECUTIVE SUMMARY

This report summarizes the outcomes of Phase 3 of Hamilton Community Foundation's (HCF) Participatory Granting Pilot, which launched in January 2024. The pilot forms part of HCF's overall Equity, Diversity, and Inclusion (EDI) strategy, with the goal of enhancing equitable resource distribution and community empowerment among equity-deserving community (EDC) organizations in Hamilton. Building upon the groundwork laid in previous phases of preparatory work and community consultations, Phase 3 included the establishment of a Community Advisory Panel and the convening of a Granting Circle, both aimed at prioritizing community ownership and EDC leadership in decision-making. The Granting Circle will convene annually over three years to decide how to distribute funds amongst the group based on community needs.

The report outlines the hybrid model employed, highlights the lessons learned from the project to date and puts forth recommendations to guide HCF's participatory granting work moving forward. We summarize the broader impact of the pilot as part of efforts towards greater community autonomy and enhanced wellbeing of equity-deserving communities. As the pilot unfolds over the coming months and years, it holds the promise of driving lasting change rooted in equity, community empowerment, and collaboration.

BACKGROUND ON THE PILOT

In recognition of the importance for equitable resource distribution and community-driven decision-making, many foundations and grant-makers have embraced more participatory funding approaches. These initiatives respond to critiques of traditional philanthropy as hierarchical, exclusive, and insufficiently responsive to the needs of equity-deserving communities. Hamilton Community Foundation (HCF) has identified local funding disparities, with 9% of donor-led granting and 25% of foundation-led granting to equity-deserving led or partnered organizations in Hamilton in the 2023-2024 fiscal year.

Following a year of preparatory work and community consultations, HCF launched its Participatory Granting Pilot in January 2024. This initiative, focusing on equity-deserving community (EDC) organizations in Hamilton, aims to bolster the capacity of EDC-led organizations and foster stronger relationships between HCF and these organizations. HCF identified six priority equity-deserving groups: Black, racialized, Indigenous, Deaf persons/persons with disabilities, women and gender diverse, and 2SLGBTQ+. By elevating the voices and experiences of those most affected by funding decisions, the pilot seeks to enhance the capacity of EDC organizations and cultivate deeper partnerships between HCF and the community. Additionally, in consultation with local Indigenous organizations, a parallel Indigenous granting strategy is in development.

Based on the results of the preparatory work and consultations, the pilot was designed to incorporate shared community values, prioritizing community ownership and centering the needs of EDC-led organizations. To maximize the decision making power of EDC organizations while also minimizing administrative burden, a hybrid model was proposed to structure the pilot. While a Community Advisory Panel (Community Panel) created the Expression of Interest and the eligibility criteria, the Granting Circle itself determined organizational needs and made final decisions about how to distribute funds amongst the circle.

OVERVIEW OF PHASE 3

This report summarizes findings from Phase 3 of the Hamilton Community Foundation’s preparatory activities for its participatory granting (PG) pilot. As a reminder, Phase 1 consisted of a literature review, which informed HCF on models and best practices to guide the PG pilot, as well as a community scan and mapping resource of equity-deserving community (EDC) -led and -partnered organizations to identify funding gaps and potential participants. Phase 2 included knowledge sharing with regional partners with experience in participatory granting, strategic facilitation with the Grants and Community Initiatives team, and comprehensive community consultations through interviews and focus groups with a range of community partners and leaders. This phase informed the creation of a hybrid model for the pilot, which features both the use of a Community Panel and a Granting Circle of EDC-led organizations.

Staged Activities for Participatory Granting Pilot

| PHASE 1 Jan.-Mar. 2023 Setting the Stage | PHASE 2 Apr.-Oct. 2023 Centering Local Needs | PHASE 3 Nov. 2023-Jun. 2024 Launching the PG Pilot |
|--|--|--|
| Literature Review | Knowledge Sharing | Convene Community Panel |
| Community Scan | Community Consultations | Launch Expression of Interest |
| Mapping Resource | Facilitation for GCI Team | Convene Granting Circle |



KEY ACTIVITIES & FINDINGS

This section provides a detailed summary of the key activities and findings from Phase 3 of the pilot, including convening the Community Panel and the Granting Circle, as well as the outcomes of these interactions. The approach to these engagements was centered on facilitating processes recommended through community consultation, embodying the guiding principles and values prioritized by the involved communities, and crafting sessions based on best practices in participatory adult learning. Throughout these sessions, the focus remained on encouraging active participation and prioritizing community leadership, aligning closely with the guiding principles and values identified in consultations. These sessions aimed for high involvement and co-design by participants, fostering participatory and engaging environments. The activities from the Community Panel and Granting Circle are summarized below.

→ COMMUNITY PANEL

OVERVIEW

The Community Panel was formed with the goal of guiding and shaping the Participatory Granting Pilot in alignment with community needs and aspirations. Composed of six community leaders with experience in nonprofits and local EDC community needs, the panel played a pivotal role in establishing the groundwork for the pilot. The panelists were selected due to their prior relationships with HCF, their leadership experience with non-profits, and their lived and professional experience with EDC communities locally. Several had also participated in the community consultations and information gathering that informed the project.

The Panel played a role in enhancing community ownership by directing the creation of Expression of Interest, but also served to reduce some of the administrative burden of the process from Granting Circle participants. Over three sessions, panelists created the Expression of Interest, adjudicated applicants, and ultimately selected successful applicants for the Granting Circle. Panelists were compensated for their time and contributions with an honorarium. Sessions were facilitated by external consultants.

Activities for Community Panel

| SESSION 1 January 2024 | SESSION 2 February 2024 | Between Sessions March-April 2024 | SESSION 3 April 2024 |
|---|--|---|--|
| Refined Pilot values and drafted Expression of Interest (EOI) | Defined decision making process and created scoring matrix | Independent review of applications | Adjudication and final ranking of applicants for Granting Circle |

→ COMMUNITY PANEL

Session 1

During the first session, the panel focused on crafting the Expression of Interest (EOI) and defining the criteria for applicant evaluation. The group reviewed findings from the broader community consultations and considered how to incorporate guiding values into their process. Based on emerging discussions and values from the consultations, the Panel drafted an Expression of Interest with eligibility criteria and application questions. The EOI included minor additions from HCF, including financial requirements related to charitable status or sponsorship. The panelists had the opportunity to review drafts of the Expression of Interest before it was posted and distributed. (Appendix A: Expression of Interest). The Panel decided to accept both written applications and video submissions in an effort to enhance accessibility and comfort. They also advised that HCF should post the EOI in English as well as French, Spanish, Arabic and Somali.

Session 2

While the call for EOI was open, the Community Panel met again to refine its decision making process - how it would adjudicate applicants and work as a group to make decisions that reflected community values. Using the determined criteria from the EOI, the Panel established application questions and a scoring matrix with criteria weighed based on community values and priorities. Panelists decided to use the scoring matrix to independently score applicants, using their individual rankings as a starting point for discussion and consensus building. (Appendix B: Scoring Matrix)

The group also determined its process for dealing with conflicts of interest. In participatory work, we recognized that "conflicts" might be better framed as multiple relationships or positions. The group recognized that everyone had multiple dynamic relationships in the community which were assets and not necessarily negative. However, the Panel agreed to the process for conflicts of interest defined by HCF, including declaring and sitting out of discussions where a panelist had a position or relationship that would potentially influence decision making, or had the appearance of influencing decision making.

→ COMMUNITY PANEL

Applications and Independent Review

The call for Expressions of Interest was open for a month during which HCF engaged potential applicants through two information sessions attended by 18 participants. HCF also offered additional support through one-on-one calls to support the applicants with questions. After the application period closed, HCF performed due diligence to ensure that applications met basic criteria, including financial sponsorship information and inclusion of all attachments. Out of 22 applications received, 21 were deemed eligible based on the established criteria. These applications represented organizations led by and serving 4 of the 6 identified priority groups: Black, racialized, women and gender diverse, and persons with disabilities. There were no applications from 2SLGBTQ+ or Indigenous-led and serving organizations.

Three organizations incorporated video submissions. Before meeting as a group, each panel member independently reviewed and scored the applications using a structured scoring sheet, arriving at Session 3 prepared with individual scores ready for discussion.

→ COMMUNITY PANEL

Session 3

The third session of the Community Panel aimed at finalizing the selection of participants for the granting circle. An HCF representative briefly joined the session to clarify the due diligence process, ensuring all application attachments were correct and aligned with financial and sponsorship requirements. The Panel engaged in a robust review of the values and processes guiding their decisions, with particular attention paid to the scoring and discussions around each application. Those with declared conflicts sat out of scoring and discussion related to specific applications.

The adjudication process was intensive but supported by structured scoring criteria and a strong facilitation framework. The Panel used a balanced scoring system where each panelist independently scored the applications before the session. These scores were averaged for each applicant, providing a quantitative baseline that ensured consistent evaluation standards. The top and bottom 3-4 applications were used as a starting point for discussion and to establish a baseline for evaluation. This method of individual reviews combined with averaged scores and discussion allowed for a structured but responsive consensus-building process.

After significant discussion, the Panel selected the top 10 organizations to be included in the granting circle, who will convene over three years. This list represents a diverse group of initiatives that promise to strengthen community ties and enhance the impact of the pilot:

- African Caribbean Cultural Potpourri Inc
- BLK OWNED
- Disability Justice Network of Ontario
- Hamilton Centre for Civic Inclusion
- Mishka Social Services
- Mizizi Inc.
- Refuge: Hamilton Centre for Newcomer Health
- Sexual Assault Centre (Hamilton and Area)
- Sisters in Sync
- Somali Community In Hamilton



→ REFLECTION ON COMMUNITY PANEL

Reflecting on the process, panelists expressed satisfaction with the outcome, acknowledging the demanding nature of the review but appreciating the comprehensive approach that ensured a balanced representation of impactful organizations within the granting circle. While personal familiarity with the organizations sometimes enhanced trust in their ability to effectively manage funds, it also sparked crucial discussions about potential biases and highlighted the necessity for an objective and balanced review process. The video submissions added a personal element to the applications, although technical issues with captioning sometimes affected comprehension. Panelists actively sought strategies to ensure that neither video presentations nor personal connections unduly influenced their evaluations, emphasizing the importance of focusing on the established scoring criteria.

This situation highlights the nuanced nature of community-based participatory grant-making. The panelists' deep community knowledge is an invaluable asset, and it is impossible—and not desirable—to completely detach from their existing awareness and relationships within the community. This underscores that the idea of perfectly impartial or objective decision-making is unrealistic and potentially at odds with the principles of participatory, community-engaged grant-making. Instead, recognizing and managing these dynamics transparently can enhance the process, making it more reflective of the community's actual needs and strengths.

In the feedback surveys, panelists expressed appreciation for their involvement in the review process, acknowledging their fellow panelists, applicants and facilitators. They highlighted the positive experience and a high level of satisfaction with the interaction and the collaborative environment. Despite the convenience of the online sessions, some panelists suggested that an in-person session could have enhanced the process. While participants agreed that the decision-making was challenging, feedback indicated it was overall a positive experience for panelists.

→ GRANTING CIRCLE

Overview

The Granting Circle was formed with the ten organizations selected based on the Community Panel's selections. Representatives from these organizations were convened over two sessions, with pre-materials sent in advance that included an overview, agenda, guiding principles, short pre-readings on participatory granting, logistical details, and a summary of each participating organization. The overall approach was designed to orient participants to the process, lay the groundwork for building relationships, emphasize the sharing of non-financial resources, and create an interpersonal dynamic conducive to making informed decisions about distributing year 1 of a \$500,000 fund among themselves. This Granting Circle will convene for three years total.

Session 1

Orientation and Group Process

The first day involved a virtual session where participants were welcomed and given a comprehensive background on the Participatory Granting Pilot's phases. The session aimed to orient participants to the process, introduce them to each other, and begin the crucial work of building relationships. During this session, participants reviewed the values derived from earlier community consultations and discussed their roles within the granting circle. This included establishing group norms and decision-making processes, emphasizing respectful communication, openness to different perspectives, and managing conflicts of interest transparently.

→ GRANTING CIRCLE

Session 2

Resource Sharing and Fund Distribution

The second session of the Granting Circle, conducted in person, delved into defining the community and organizational needs, setting the stage for collaboration and decision-making. Participants opened by adding to group norms and expressing a mix of excitement and apprehension about the process ahead. There was an honest acknowledgment of vulnerabilities, with concerns about being judged or scrutinized and a fear that the process might inadvertently pit equity-deserving communities against each other. Despite aiming to foster a spirit of abundance and reciprocity, participants recognized the practical constraints imposed by a fixed budget.

The session revisited key themes from earlier community consultations, highlighting both recent collaborative successes and the pressing challenges confronting equity-deserving communities. Participants discussed the increasing oppression, crackdown on EDI initiatives, and the scarcity of material resources that significantly impact these communities and the organizations' work. These conversations shaped the decision-making processes throughout the day. Next, each organization presented their specific capacity-building needs along with non-financial resources they could contribute, which was documented for mutual benefit.

The session involved significant discussion about how to allocate the \$500,000 fund. Facilitators came prepared with some options for participants to consider. One option was to use a Shared Gifting model where each organization initially receives \$50,000, keeps \$10,000 and decides how to redistribute any additional funds among themselves. A second option was to grant each organization their top 3 capacity building priorities, based on their submitted budgets. Early in the session, participants themselves suggested a third option: for each organization to receive \$50,000 - in other words, to divide the fund equally among themselves.

→ GRANTING CIRCLE

After considerable discussion, the group reached a consensus and selected option 3, primarily for its simplicity and fairness in their initial meeting. As a new group who are still getting to know and trust one another, this option avoided the complexities of scrutinizing each other's detailed budget proposals and ensured that no organization felt unduly judged, disadvantaged or rejected. As organizations led by equity-deserving communities, the participants felt cautious about critiquing each other at this stage. One participant referenced Shine Theory (Sow and Friedman) stating "If you shine, I shine, we all shine" - prioritizing mutual support and collective uplift, rather than competition. Organizations requesting over \$50,000 agreed to accept less to ensure equitable distribution, while those requesting less were trusted to use the additional funds effectively. The group plans to revisit their funding distribution approach in subsequent years, adapting as their relationships evolve.

After making the decision to allocate the funds equally, the group returned to the resource and asset sharing list, adding additional items to offer the Granting Circle, including offers of: space, equipment, granting writing support, strategic advising and coaching, advocacy support, networking connections and cross-promotion. This exchange not only diversified the support each organization could access but also embodied the project's values of reciprocity, generosity, and abundance. By actively contributing and leveraging their unique capabilities, participants reinforced a sense of community and mutual aid that went beyond financial assistance, showing a commitment to supporting each other's growth and impact within the community. The session concluded with reflections on the process and discussions on future engagements and support mechanisms from HCF.

REFLECTIONS ON THE GRANTING CIRCLE

Participants in the Granting Circle reflected positively on the experience, appreciating the opportunity to build meaningful connections and potential collaborations with other organizations. The atmosphere was described as supportive and conducive to open discussion. Participants were energized by the generosity of non-financial resources shared among the group and planned to connect independently to support each other outside of HCF's planned Learning Exchange sessions. Facilitators observed a notable level of agency and boldness among Granting Circle participants, who chose an option for fund distribution that hadn't been initially presented, signaling the participants' comfort and safety within the group. This decision demonstrated the participants' readiness to embrace their roles as active decision-makers in the granting process. Participants also noted the power of being in a room and making collective decisions with other leaders from equity-deserving communities. One member shared that this was their first experience in a group process where they were not the only racialized person present.

Survey respondents indicated a high degree of satisfaction with the outcomes of the Granting Circle (average ranking of 4.8 out of 5). Key feedback for future improvements included requests for more detailed information about each organization prior to decision-making which would enhance their ability to make informed decisions during the granting process. Further feedback from the Granting Circle participants will be captured by the external evaluation team. (Appendix C)



Photo Credit: Sisters in Sync

→ LESSONS LEARNED

Throughout Phase 3 of the Hamilton Community Foundation's Participatory Granting Pilot, several key lessons emerged highlighting the complexities and rewards of participatory granting models:

1. **Shifting Power Takes Time:**

The processes of setting up, conducting, and reflecting on the sessions underscored that building trust and understanding among participants in community-driven decision-making takes significant time and thoughtful facilitation. The granting circle's decision to allocate funds equally in their initial meeting highlighted the importance of allowing space for relationships to form before diving into more complex decision-making. The lack of applicants from 2SLGBTQ+ and Indigenous-led organizations indicates there may be an opportunity for further relationship building to encourage more robust participation across EDC communities.

2. **Context Matters:**

The context of equity-deserving communities, including increased oppression, crackdowns on EDI initiatives, and the impact of scarcity in material resources, informed organizational needs and group process. The historical underfunding and competition among underfunded organizations shaped what was possible and comfortable for the group, influencing their collective decisions and strategies.

3. **Value of Building Trust and Safety:**

The establishment of group norms and the creation of a supportive atmosphere was crucial for empowering participants within the Granting Circle as well as the Panel. In a context involving significant financial decisions and collaboration among diverse organizations, fostering a sense of trust and safety enabled open dialogue and mutual respect.

→ LESSONS LEARNED

4. Emphasizing Resource Sharing and Non-Financial Support:

The enthusiastic exchange of resources during the granting circle sessions demonstrated the value of non-financial support and the potential for mutual aid among community organizations, which can be as critical as direct funding.

5. Preparation Support:

The importance of clear pre-materials and thoughtful planning was underscored throughout the sessions. Well-prepared materials helped orient participants to the process, set expectations, and facilitated a smoother engagement in discussions and decision-making.

6. Technological Considerations:

Balancing the accessibility and scheduling ease of virtual meetings against the deeper connection and engagement possible via in-person meetings was a recurring theme. Decisions on the format had significant implications for how comfortably and effectively participants could engage with each other and the material. In addition, innovations like video submissions, which serve to enhance submission access for some, also require attention to details like ensuring proper captioning to ensure all forms of communication are accessible and effectively integrated into the decision-making process.

RECOMENDATIONS

This section outlines key recommendations for HCF's upcoming participatory granting pilot, based on the learnings from the first Community Panel and Granting Circle.

RECOMMENDATIONS

1. Facilitate Interactive Learning Exchange Sessions:

Plan and implement Learning Exchange sessions in Fall 2024 and Winter 2025 to foster collaboration, share achievements, and discuss challenges among the Granting Circle participants. These sessions should be designed as interactive and engaging forums that encourage verbal sharing and storytelling, minimizing the administrative burden on EDC organizations. By allowing participants to report back in an accessible and community-centered manner, these sessions will embody principles of trust and mutual accountability.

2. Document and Share Learnings:

Continue documenting the learnings and outcomes from the pilot to build a body of knowledge that supports iteration and responsiveness. Ensure these insights are shared not only within the philanthropic sector through reports, conferences and knowledge sharing, but also continuously with the Granting Circle Participants, Community Panel, and all those involved in initial and ongoing community consultations. Consider developing a Community of Practice for other funders exploring participatory granting to share best practices and collaborative problem-solving.

3. Prepare for Sustainability and Scalability:

Create a detailed, multi-year strategy that anticipates the future expansion and sustainability of the pilot. This strategy should outline key steps for gradually increasing the scope and scale of the initiative, including onboarding new participants, securing sustainable funding and building infrastructure for scalability.

RECOMMENDATIONS

4. Expand Non-Financial Support and Resource Sharing

Opportunities:

Provide training and resources to EDC organizations to enhance their capacity and impact. This could involve leadership development programs, grant writing workshops, and governance training - all common requests of Granting Circle applicants.

Develop a formalized platform or mechanism for continued resource sharing among the Granting Circle participants. This could include a shared digital space where resources can be listed, requested, and exchanged, fostering ongoing collaboration beyond the formal session and/or facilitating in-person gatherings.

5. Address Funding Disparities Across HCF's Funding Streams

Continue development of the strategic initiative aimed at redirecting a greater proportion of donor-advised and discretionary funds towards equity-deserving community (EDC) organizations. Recognizing the historic underfunding of these groups locally, this strategy includes educational outreach to donors about the importance of equity in philanthropy and the unique impact and needs of EDC organizations, and ongoing staff education. On the donor-advised side, the strategy could be bolstered by enhanced mechanisms for donors to connect meaningfully with EDC-led initiatives, potentially by showcasing successful projects and demonstrating the impact of targeted funding. Efforts should also be made to create formal targets related to funding allocation to organizations led by equity-deserving communities across all granting streams. This approach not only advances HCF's EDI Theory of Change but also contributes to the long-term sustainability and resilience of EDC organizations by broadening their funding base.

CONCLUSION

Phase 3 of the Participatory Granting Pilot has highlighted the transformative potential of community-driven funding models as well as its nuances and challenges. The establishment of the Community Panel and the Granting Circle is one effort to redistribute resources in alignment with the principles of equity and reciprocity, while enhancing a sense of ownership and collaboration among equity-deserving communities in Hamilton. The insights from the pilot underscore the importance of thorough preparation, the value of building trust and safety, understanding the specific context of equity-deserving communities, and the sharing of non-financial resources. These insights will guide the refinement of the pilot and underscore the need for ongoing evaluation and iteration.

As HCF continues to navigate the complexities of participatory granting, the experiences from this pilot offer valuable lessons for future participatory, trust-based initiatives, ensuring that the Foundation's actions remain closely aligned with its commitment to equity, diversity, and inclusion. This initiative has considerable promise at enhancing the capacity of equity-deserving community organizations, who are uniquely positioned to enhance the health and wellness of the communities served. The path forward involves not only expanding these participatory approaches but also scaling them in a way that respects the unique needs and contributions of all participants.

APPENDIX A: HCF PARTICIPATORY GRANTING CIRCLE - EXPRESSION OF INTEREST

Participatory granting is a trust-based, community-engaged approach to granting that shifts decision-making power to those most impacted by the funding. Hamilton Community Foundation's Participatory Granting Pilot invites applications from organizations who serve and are led by equity-deserving communities (EDCs) to join a granting circle to determine community needs and allocate funds. The focus and purpose of funds is capacity building for equity-deserving community-led (EDC-led) organizations. These organizations are uniquely positioned to respond to pressing local needs and have the knowledge and expertise to make the most positive impact on the lives and health of EDCs.

The funding available for the Participatory Granting Pilot in 2024 is \$500,000. Organizations participating in the Granting Circle will receive a minimum grant of \$10,000. The remaining funding allocations will be determined by the Granting Circle.

Eligibility

To be eligible, the organization must represent at least one of the six priority EDC communities listed below for the project and have an annual operating budget of less than \$1,000,000.

Who are the priority EDC communities for HCF's Participatory Granting Pilot?

- 2SLGBTQ+
- Black
- Deaf and disability
- Indigenous
- Racialized
- Women, girls and gender diverse

What is an EDC-led organization?

To be eligible for this expression of interest, EDC-led organizations must have each of these aspects:

- An explicit mandate to serve the EDC population.
- A majority of leadership, board and staff that reflect the EDC.
- A mission and activities that are informed by the EDC's experience and knowledge.

APPENDIX A: HCF PARTICIPATORY GRANTING CIRCLE - EXPRESSION OF INTEREST

In addition, eligible organizations will demonstrate the following:

- An operating budget of less than \$1M.
- Capacity-building needs related to operational, programmatic, financial, or organizational maturity.
- A willingness to participate in a collaborative granting experience that will determine priorities and allocation of available funds. We anticipate that this will take place over two half-days in April.
- Charitable status or fiscal sponsorship. Organizations without a fiscal sponsor are encouraged to contact HCF.

How does HCF's Participatory Granting Pilot model work?

There are two decision-making groups in HCF's Participatory Granting Project:

- 1) the Community Advisory Panel and
- 2) the Granting Circle.

The Community Advisory Panel has designed the Call for expressions of interest (EOIs) and will review all eligible EOIs received by the deadline. The Granting Circle will be made up of the organizations that are selected by the Community Panel through the EOI process.

The following are key steps in the process:

1. EDC-led organizations submit EOIs.
2. HCF staff review all EOIs/organizations for eligibility.
3. All eligible EOIs are passed to the Community Panel for review.
4. The Community Panel reviews EOIs and selects up to 10 organizations to make up the Granting Circle.
5. The Granting Circle meets over two half-day sessions and, together with the support of a facilitator, determines how to distribute the available funding among themselves. Organizations selected for the Granting Circle will receive a minimum grant of \$10,000.
6. The Granting Circle will convene again in 2025 and 2026 to review capacity-building needs and distribute available funds among Circle members.

APPENDIX A: HCF PARTICIPATORY GRANTING CIRCLE - EXPRESSION OF INTEREST

Funding purpose and priorities

This funding aims to support capacity-building for Equity-deserving community-led (EDC-led) organizations. The Community Panel has defined capacity building as whatever is needed to bring an organization to the next level of operational, programmatic, financial, or organizational maturity. The following are examples of capacity building activities:

Nurturing people:

- Activities to strengthen, build and support human resources, such as developing HR, operational or governance policies and structures; developing recruitment and retention strategies; providing internal mental health support, mentorship and coaching; volunteer management and upskilling; youth leadership expansion such as convening advisory boards; and increasing knowledge of labour/workers' rights.
- Planning and implementing EDI and Reconciliation initiatives and building networks and collaboration.

Nurturing systems and structures:

- Building or acquiring systems and structures to increase capacity and becoming trained in those systems. For example, contact management systems, financial administration and accounting systems, systems for digital operations and communication tools and systems.
- Building plans and structures to enable growth, such as developing a communications strategy and/or fundraising strategy; and conducting a governance review and governance training.
- Building systems and structures for compliance and responsiveness to established and emerging accountabilities, for example data management and privacy, health and safety responsibilities, and accessibility and Accessibility for Ontarians with Disabilities Act (AODA) compliance.

Nurturing program and service capacity:

- Acquiring the skills, knowledge and or/resources needed to support quality improvement and/or cultural practice capacity to meet community needs.
- Acquiring the skills and knowledge and or resources to support program and service growth, for example evaluation and redesign, communications and public relations skills including grant writing.

APPENDIX A: HCF PARTICIPATORY GRANTING CIRCLE - EXPRESSION OF INTEREST

How Expressions of Interest will be assessed

Expressions of Interest from eligible organizations will be reviewed by the Community Panel, and assessed on the following criteria:

- **Alignment (25% of score):** The EOI aligns with the funding priorities, with a clear connection to capacity building and organizational maturity. The aim or achievements of work proposed are realistic based on the funding available.
- **Need (20% of score):** The organizations and EOIs demonstrate alignment with the funding priorities to support capacity building for EDC-led organizations.
- **Potential impact (35% of score):** The organizations seek funds to support capacity- building efforts that will have considerable impact on ability to serve EDC communities and respond to current and future community needs and issues.
- **Engagement and collaboration (20% of score):** The organizations demonstrate a willingness and ability to participate in a collaborative experience. Organizations have experience working with diverse community partners and/or intend to collaborate with partners to enhance capacity to serve new populations.

APPENDIX B: SCORING MATRIX (SAMPLE)

Community Panel Review Tracker - HCF Participatory Granting Pilot

Instructions:

Use the drop-down menus to score EOIs on each assessment criteria in columns C,D,E and F. Score from 1 to 6, where 1 is weak and 6 is strong. The total score, based on the weighting of each category, will populate in column G. Highest possible score is 60.

| | | Assessment criteria | | | | | |
|---|-----------------|---|--|---|---|----------------|---------------------------------|
| | Applicant | Capacity Building Needs (20%) *Provides a clear explanation of current capacity *Identifies need/gap in organization and opportunity for growth in organizational maturity | Funding Request and Alignment with Priorities (25%) *Request aligns with priorities, clear connection to capacity building, organizational maturity *Realistic aim or achievement based on the amount requested | Potential Impact (35%) *Considers lasting impact or transformation from the initiative/ intervention *Impact is realistic and specific *Identifies internal and external benefits/ impact, such as reducing of barriers for organization and/or community | Collaboration (20%) *Demonstrates understanding of the needs of different equity-deserving communities *Shows willingness to work with others, real world examples demonstrate commitment to collaboration | Weighted score | Comments / Questions / Concerns |
| 1 | Organization #1 | | | | | | |

APPENDIX C: SUMMARY OF INITIAL GRANTING CIRCLE FEEDBACK

| Survey Prompt | Average Ranking (out of 5) |
|---|----------------------------|
| The pre-materials and communications from HCF helped me to prepare for the session. | 4 |
| The goals of the session were clear. | 4.3 |
| The facilitators created a productive and supportive space for active participation and engagement. | 4.7 |
| The decision making process was transparent and fair. | 4.2 |
| I had the opportunity to contribute to the conversations, discussions and decisions. | 4.8 |
| The group was highly collaborative and supportive. | 5 |
| I am satisfied with the outcomes of the granting circle. | 4.8 |