



Insights and ideas to deepen community responsiveness and systems impact

Research by:



In partnership with:

vancouver
foundation

Short Summary

Purpose

This paper shares learning from ten weeks of research on what's driving Vancouver Foundation's systems change grantmaking practice, and identifies concrete ideas to deepen equity and impact. Its purpose is to prompt rich conversation, and help us determine the bounds for prototyping and experimentation.

You'll find:

Page 3_ **Scene setting** is an introduction to the impetus behind this work and InWithForward's mandate.

Page 4_ **Process** gets at the why, what, and how of our approach. In it, you'll find:

- Our understanding of grantmaking as a system in itself;
- A two-track time horizon to learning about how to shift that system, and to what end; and,
- How we have learned about Vancouver Foundation's current practice through observation and interviews

Page 6_ **Understanding Practice** describes and reckons with what we've observed about current grantmaking practice:

- Core tenets of VF's grant making practice and the values they are informed by;
- Our analysis of why some key practices might have the effect of limiting equity and systems impact;
- Trends emerging about who is and who isn't submitting applications, with what success rates

Page 8_ **Holding Patterns** introduces a framework that proposes three elements of what keeps systems fixed in place, and correspondingly, where the levers of change are. We argue that strengthening equity and impact isn't simply about making a few tweaks, but about probing what's keeping current practice in place.

Page 11_ **Framing Change** sets the stage for a series of ideas we could test to learn how to shift Vancouver Foundation's grantmaking towards more equitable and system-impacting outcomes. Here we suggest that the COVID-19 pandemic has highlighted the argument for why Vancouver Foundation should continue to deepen its investment in the informal realms of civil society, alongside the organizational and institutional, where shared values and commitments are discovered, debated, and affirmed, and to consider this as crucial action towards systems change.

Page 12_ **Opportunities for Change** sets out six areas for experimentation and learning, drawing on recent research on the barriers to philanthropic equity. We flesh out these six areas with 15+ small and big ideas for different ways to be proactive and community responsive; fair and open; relational and influential.

Page 18_ **International Inspiration** presents some of the reference points that intrigued us and fueled our thinking, but it also makes visible gaps in practice we found on the global stage. These gaps point to some of the challenges that crop up in achieving community governance of broad, equity-seeking, systems change work.

Page 20_ **Grantee Perspectives** offers first thoughts from 10 interviews with grantees, many of whom see a more substantive role for Vancouver Foundation to play, beyond that of a neutral funder and decision-maker.

Page 22_ **Appendix**

Scene Setting

Five years ago, Vancouver Foundation made a big, prescient move: shifting from a focus on social good to systemic change, from plugging symptomatic holes to excavating root causes. At a moment when racial riots are rocking the US, hate crimes in Canada are climbing, and public health and social care systems worldwide are struggling to catch-up to the emergent realities of COVID-19, we see how inadequate band-aids are against deep-seated inequity — and how, in many ways, Vancouver Foundation has laid the groundwork for now.

"[I'm proud] that we are doing systems change grantmaking. I have a lot of questions of how, but I still believe it's quite bold that we've made a commitment to this work."

Executive Team

"[I'm proud] that we're looking at our work not just through a short-term lens, but through a longer term lens that can lead to real impact. I think it's easy to look for band-aid solutions to problems. Systems change is getting to the root causes and it's harder work. I'm proud that we're prepared to do that heavier lifting that needs to be done within the foundation movement and demonstrates leadership."

Board Member

"[I'm proud] of our evolution towards system change. We decided to do something we said we would always do. Being able to anchor all of our work to that — to addressing the root causes of issues — and bringing people along, internally and externally, I was happy and proud."

Staff Member



The evaluation of Vancouver Foundation's system change grantmaking from 2015-2018 shows strong progress fostering two of four conditions for systems change: the supply of and demand for systemic solutions. **But, solutions from whose perspective?**

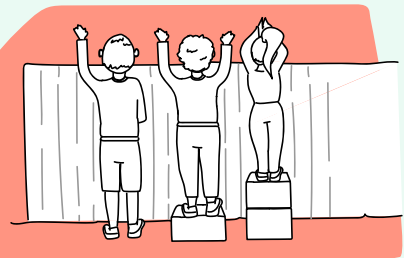
The same evaluation acknowledges smaller, rural, Indigenous and historically marginalized communities have less capacity to apply for systems change grants, and recommends adapting grantmaking to "increase access and equity." **But, equity isn't only about leveling the playing field. Equity is also reckoning with whose field is being played on.**

As one board member puts it, "I'm really curious about what we think we mean by systems change, and how we go about it. In other words, whose worldview are we using to define the so-called system and what should it look like moving forward?"

leveling the playing field



whose playing field? whose worldview?



Over the past 10 weeks, our team at InWithForward has partnered with Vancouver Foundation's Grants and Community Initiatives team to act on the evaluation results:

- First, by understanding what's driving current grantmaking practice
- Then, by generating ideas for ways to **shift power imbalances and deepen systemic impact**
- Next, by testing a handful of ideas to figure out what could actually work.

This briefing paper shares our emerging insights and ideas. The goal is to prompt lively conversation, invite alternative points of view, and gain permission for experimentation.

How do we recognize and shift the power imbalances within Vancouver Foundation's system change grantmaking, deepening community responsiveness and impact in a COVID-19 era?

Our Process

We're applying a systemic design approach to strengthening systems change grantmaking. Sure, that sounds meta, but we're starting with the premise that grantmaking is its own system, underpinned by mental models, relationships, power dynamics, resource flows, policies and practices. Shifting grantmaking, then, requires an approach that can grapple with complexity by both understanding and interrupting patterns.

This is an approach characterized by:



Convergence & divergence

We zoom in and out: widening our viewfinder to gather a multiplicity of perspectives, and narrowing our viewfinder to identify trends and opportunities.



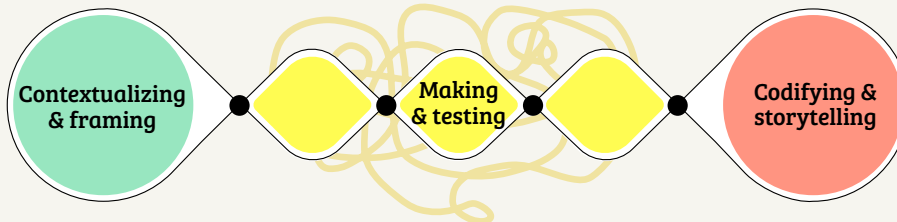
Human centeredness

Systems are made-up of lots of people, each with their own interests and perspectives. We look, listen and learn from people with different vantage points to make and test interventions that hopefully hit a sweet spot by responding to a multiplicity of needs.



Learning by doing

Systems are messy and emergent, often undermining conventional planning and risk mitigation. Prototyping, by contrast, enables real-time learning, rapid iteration, and feedback. We make and test practices, at small scales, in order to surface challenges and maneuver around barriers.



Engaging 1st phase



- VF staff: GCI team & others
- VF board & leadership
- Current grantees
- Thought leaders

In addition for 2nd phase



- Declined applicants
- Potential applicants
- Advisors
- General public
- Donors?
- Experts

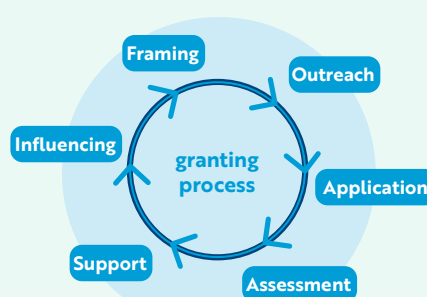
We're contextualizing

Our design process is in three phrases: a contextualization phase, a testing phase, and a codification phase. We've been in the **contextualization phase**, where we listen to stakeholders, observe practice, analyze data, read literature, find international examples, and generate early ideas. This briefing paper shares what we've learned. Next up, we'll test a handful of alternative grantmaking practices, all so we can figure out what works and what doesn't, to inform longer-term thinking and implementation.

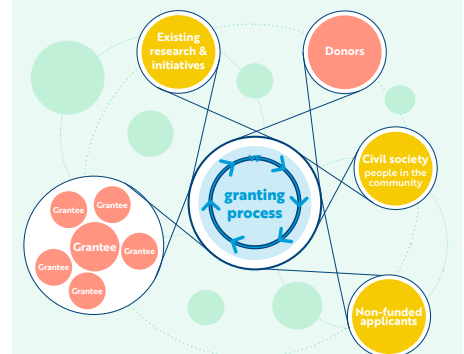
Two time horizons

We're working at two paces: (1) a fast track, to make small tweaks to the 2020-2 systems change grant cycle and set-up iterations to the 2021-1 cycle, and (2) a slow track, to develop longer-term systems change practices. While the fast track is exploring alternative grantmaking practices — e.g prioritization, application formats, decision-making tools — the slow track is also looking at practices beyond grantmaking — e.g capacity building and advocacy functions.

Fast track: tweaking granting



Slow track: longer-term change



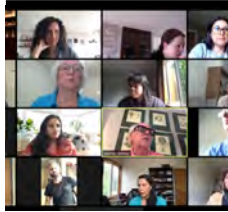
Research



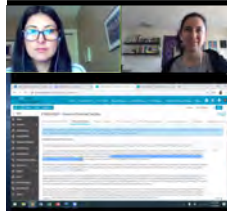
Timeline workshop with all GCI staff



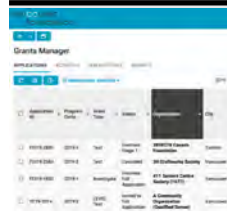
Interviews with staff, board members, leaders, grantees



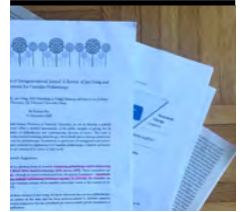
Observed advisory committee meetings



Shadowed reading systems change grant applications

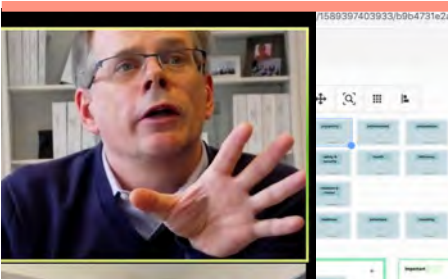


Analyzed historic applicants' data



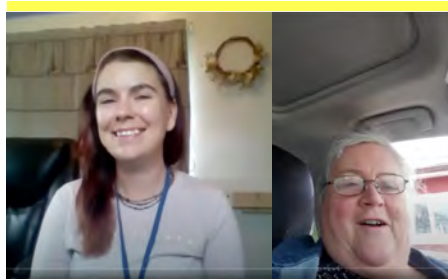
Literature review & desk research

So far, we've engaged over 30 staff, executive leaders, board members, and grantees. Here's a sampling of who we've met, and their reference points for systems change.



Kevin, president and CEO

"...I was once part of a \$1.5 billion dollar collaborative on maternal and child health. That was the most successful thing I've been part of. I would love to be part of that scale again But I want the charities to pick the moonshot."



Long-term Inmates Now in the Community (LINC), systems change grantee

"We're small. We're grassroots. Our office is literally a tiny home! ... We're the only organization founded and driven by ex-offenders. We're still well positioned to achieve systems change in light of COVID because we work at the intersections of food security, transformative justice, barriered workforce, etc."



Joe, board member

"When we talk about something like system change, what we see is a colonial system imposed on a population that has really marginalized their whole social and economic outcomes. And so, do we mean system change where it's comfortable or that starts with a different worldview, teachings and values? I have examples of how we've done that in healthcare, when it comes to things like cultural safety, humility, addressing systemic racism and, along with personal racism and biases."



Mike, grant manager

"My undergrad is in political science, and I think that gives me an institutional bias towards certain types of systems change, on changes made through laws, parliament, etc. I still check applications that are a natural 'yes' because I understand that persists."

What's a system?

"Natural and engineered systems cannot be other than what they are. Human activity systems, on the other hand, are manifested through the perceptions of human beings who are free to attribute a variety of meanings to what they perceive. There will never be a single account of human activity systems, only a set of possible accounts, all valid according to a particular Weltanschauungen [world view]."

Peter Checkland, 1981

Understanding Practice

Systemic design research unfolds in the places and spaces where people act. Systems change grantmaking largely takes place in two contexts: via (1) the online grant management system and (2) Community Advisor committee meetings. We've spent time in both contexts, observing how staff and Community Advisors operate, and exploring relationships between what people say and what people do.

Staff and board members repeatedly use the words 'community-driven' and 'community-inspired' to describe their grantmaking practice, and unanimously select *equity* as a core value underpinning their practice. Diving into what this grantmaking practice actually looks like, we see five core features:

Feature 1: Open Agnosticism

Systems change grants are open to any qualified donee (charity, university, municipality) on any systems change topic for up to \$300K for three years. On any given day, staff might toggle between an application from a rural charity addressing the animal welfare system to an application from a large university looking at the drug treatment system.

Open doors and open calls produce a high volume of applications: in 2019, staff read over 400 applications. Workloads prevent relationship building or content specialization: *"We don't build connections doing the work we do; we just don't have the time to go out there into the community."* The same knowledge gaps can exist for Community Advisors, who must also contend with applications across systems, sectors, and geographies. As one advisor put it during a committee meeting: *"I am not familiar with this sector. I honestly don't know how to evaluate given what I don't know."* That struggle is familiar to foundation leaders: *"Even though we truly believe in community informed priorities, it is tough to say we're system agnostic, because somewhere in our process we need the competency to assess things...and I know not all staff and advisors can be across all areas."*

Why this matters for equity & impact?

- Open doors and open calls arguably support equality more than equity. An equity approach recognizes what it takes to knock at the door, along with what it takes to successfully enter the door.
- The high volumes of applicants coupled with the breadth of issues sets up a transactional rather than developmental relationship with grantees. The demands of administration can override community outreach, knowledge building, and co-learning.

Feature 2: Two Times Written

Staff and advisors spend most of their time interacting with the written word. While applicants can reach out to staff for phone consultations, applicants are largely assessed on the basis of their prose. Both the first and full application stages rely on a narrative-based application where the quality of the writing can overshadow the quality of the ideas.

Across committee meetings, clarity of writing was a decisive factor in recommendations. As one advisor noted, *"This [application] is an urgent and emergent issue, but the purpose and intent were just not well-expressed."* Yet, staff frequently find writing stymies clear communication. As one staff member put it: *"I am often surprised by how much more eloquent people can be when they talk about their work than when they write."*

Why this matters for equity & impact?

- Grant writing is a specialist skill that larger and better resourced organizations have greater opportunity to hone. An equity approach recognizes that strong ideas and strong leadership can be expressed in a multitude of ways, and should not be constrained to one medium or one standard of excellence.
- Written systems change applications prize linear over relational thinking, and might miss an opportunity to showcase systems thinking using network maps and visual theories of change.

Feature 3: Solitary Assessment

Applications are read and scored one-by-one. After reviewing upwards of 50 applications in a given cycle, staff find it hard to keep track of, let alone see similarities between, applications assigned to other staff members. Similarly, advisors are asked to comment on the merits of each proposal, without a mechanism to see related proposals from prior grant cycles, or that may be in front of other committees. The result is that applicants addressing a common systemic issue across sectors – for example, decolonizing education versus healthcare versus social services – are likely to be assessed separately, rather than as parts of a whole. While staff offer brief summaries of each application during committee meetings, they try not to steer the conversation. *“We don’t want to be an intervening force,”* said one staff member. Another noted that, *“Maybe 45-50 per cent of the time, the decisions the committee makes might not have been mine, but that’s by design.”*

Feature 4: In the Room

Community-driven decision-making comes down to which community members are in the room. In every committee meeting observed, a persuasive Community Advisor could strongly influence the funding outcome. As one committee chair noted: *“We never have perfect information, but you are the experts so we just ask your judgment, and we will be comfortable.”* Most often, judgments came from the firsthand knowledge of a handful of Community Advisors. Because committee meetings are held at Vancouver Foundation (or now, virtually), out of the contexts in which applicants operate, an advisor’s familiarity with the organization or locality can hold significant weight. Without ways to see the context or hear directly from people affected by the issue, an organization’s reputation seems to be a decisive factor – along with perceived project feasibility and quantity of partnerships. For example, take this exchange:

Advisor 1: *“I was a strong recommend, though I will disclose a personal bias. I have a personal history in this community and I can see the strong need, and can vouch for their relational approach...”*

Advisor 2: *“I am glad to hear the feedback on the local context...I can be a strong recommend.”*

Advisor 3: *“I was a strong maybe before. I think I will adjust my score now...”*

Feature 5: Hands-Off

Once funding decisions are made, and monies are allocated, Vancouver Foundation staff and advisors step back. They have no ongoing role. There is no mechanism for bringing the lessons of prior granting cycles into present-day decision making. While successful grantees submit progress reports, to date, advisors haven’t been privy to that information. *“Our approach to learning and evaluation didn’t prioritize learning for advisors or grantees,”* said an executive leader. Staff members also voice uncertainty with what to do with grantee learning: *“When we read progress reports, we’re not supposed to have opinions. We get it’s messy. We’re just officers to manage the dollars. We don’t want to be an intervening force.”* Only some grantees would welcome more interventions: *“The online application was very regimented... there was no personal contact. When you are trying to make systems change, the human connection is nice. Even though I see Vancouver Foundation as funder, the lack of sharing/discussion was a bit odd.”*

Why this matters for equity & impact?

- Attention to the relationships between parts is a defining feature of systems change. Impact likely requires sustained & coordinated efforts to shift structures, relationships, and mental models. Funding a little bit of everything arguably prevents that sustained & coordinated effort, inadvertently emphasizing parts over the whole.
- Organizations with weaker applications may fare poorly when considered on their own, but gain viability when assessed as part of a cluster of projects working towards a similar purpose and goal.

Why this matters for equity & impact?

- Decisions transpire behind closed doors with no opportunity for applicants to challenge interpretations and contest perceived biases. Equity approaches typically embrace full transparency.
- Advisors reflect a slice of community: trending towards educated professionals with capacity to volunteer their time. Systems change is strengthened by seeking out alternative logics and perspectives. Valuable, but underrepresented, are those with lived experience of inequitable systems, limited financial means, and without organizational affiliations.

Why this matters for equity & impact?

- Taking a hands-off approach significantly slows active learning and iteration, which are hallmarks of systems change approaches.
- Taking a backseat role assumes organizations have equivalent capacity and means to effectively act, rather than recognizing some organizations might require more support and access to resources beyond money.

Identifying Patterns

Community-driven, community-inspired, and equity are deeply held sentiments within the Foundation, but they are not synonymous. A community-driven and inspired approach is not necessarily equitable: it depends on who in the community is driving and inspiring decisions, and who may be left behind.

We can look at the data and pose three sorts of questions:

1. Who is knocking at Vancouver Foundation's door and getting in?
2. Who might not be knocking at Vancouver Foundation's doors?
3. Who is making decisions? What perspectives and positions hold weight?

What the data cannot tell us is who should be driving and inspiring decisions, and whether Vancouver Foundation has a role to play beyond opening its doors to eligible organizations. One executive leader isn't so sure:

"I struggle a bit with the notion that we are responsible for who comes in our doors. If we set up an open system and people don't come in, is that our issue? I'd have to think about that. Is it a problem in achieving our goals?"

Acknowledging limits

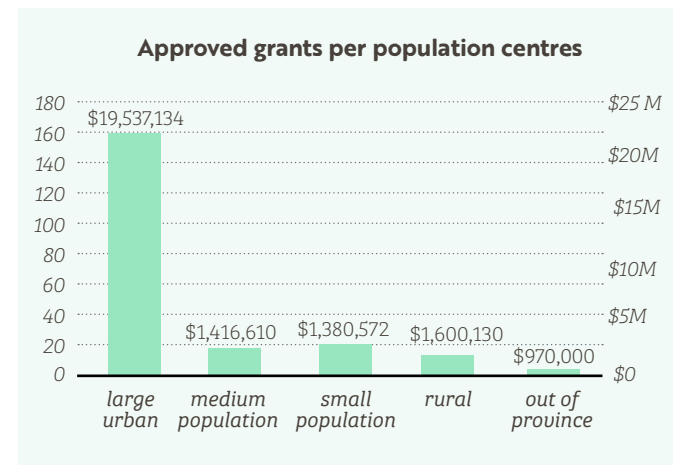
Looking to the data to map equity has significant limits. Vancouver Foundation does not collect demographic data about organizations or its leaders. By pulling census data, we can piece together a geographical analysis. By pulling CRA data, we can piece together an analysis about organizational age and size. We do not have data to understand other axes of diversity such as gender, race, ethnicity, experiences of marginalization, etc.

1. Who is successfully coming in the door?

Urban areas receive more funding.

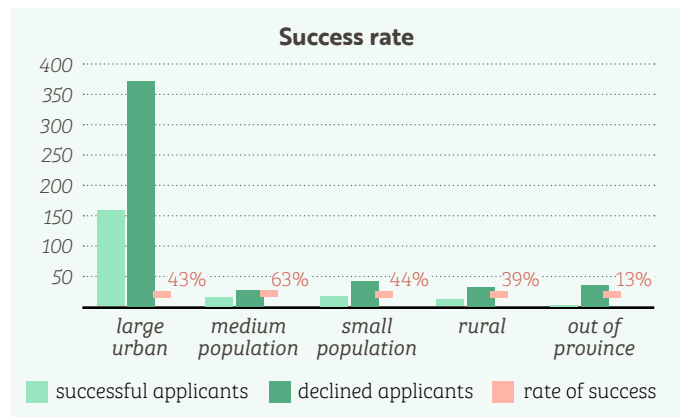
Based on current granting amounts, Vancouver Foundation grants out about \$6.80 to each person in large urban areas, \$2.40 in medium population centres, \$2.53 in small population centres, and \$2.53 in rural areas. While there isn't currently an ideal number for what granting amounts should look like in each area, there is clearly a larger amount going to urban cores. There may be several reasons why: more social issues to address, larger applicant pools, or the outreach of programming. Regardless, there seems to be a disparity between who receives funding from Vancouver Foundation based purely on location.

This chart details the LEVEL and FOI grants delivered across BC in 2019.



While more money flows to urban areas, success rates by geography are similar.

In other words, organizations from urban centres knock more, and so get a bigger distribution of dollars, but when organizations from medium and small areas come to the door, they are just about as successful. This chart looks at the success rate of organizations by geographical distribution.

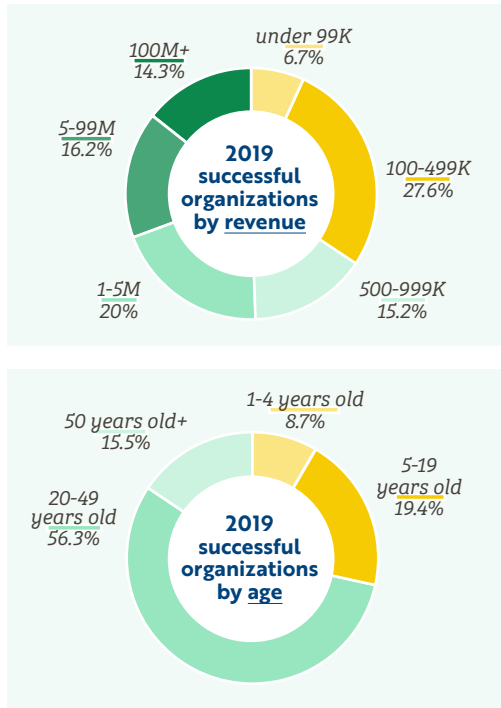


But, when we just look at decline rates for FOI grants, we see a bigger rural discrepancy. Organizations from 83 different localities have applied for FOI grants since 2018. Organizations from 50 different localities have been successful. So who hasn't been? Of the 23 unsuccessful localities, 20 were under 20,000 people. Here's the small and rural communities with a 0% success rate:

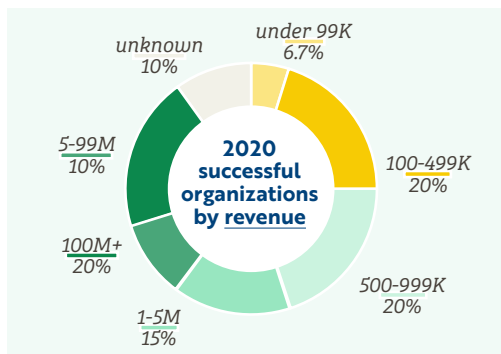
- Chase
- Sooke
- Masset
- Terrace
- Nakusp
- Dog Creek
- Esquimalt
- Fort Steele
- Gold River
- Grindrod
- Lady Smith
- McBride
- Revelstoke
- Brackendale
- Port Rowan
- Salmon Arm
- Shawnigan Lake
- Riske Creeke
- Williams Lake
- Mansons Landing

Larger, established organizations are well represented

71% of successful organizations in 2019 have been around for twenty years or more, and 67% of successful organizations have annual revenue over \$500K a year.



The trend is very similar for 2020 Develop Grants, where 65% of successful organizations had revenue over \$500K, and 75% were twenty years or older. Since Develop Grants are one of the entry points for longer term systems change work, they arguably set the stage for Test and Scale grants. If there's a trend towards certain organizations at the Develop stage that may continue into subsequent stages.



It is certainly worth noting that comparing 2018 to 2019 data shows movement away from established organizations with large budgets. Comparing data between these two years shows that success rates have dipped for bigger and older organizations. Please see the appendix for a full comparison. With only two years of data to compare, and 2020 Develop Grants suggesting continuity from 2019, it's too soon to draw conclusions. What is clear is that organizations aged 20-40 and with annual revenue of \$1-5M continue to make-up a significant percentage of successful applications.

Universities receive the most multiple grants

About 67% of organizations who apply to Vancouver Foundation are not successful. Of the successful organizations, most have received just one grant from the Vancouver Foundation since 2018. Eleven organizations have received two FOI grants from the Vancouver Foundation -- seemingly using the Convene and Develop grants as springboards for Test and Scale grants. Three organizations have received four or more grants from the Vancouver Foundation: UBC with seven grants, SFU with six grants, and University of Victoria with four grants. That means 9% of all successful FOI grants flowed to three universities.



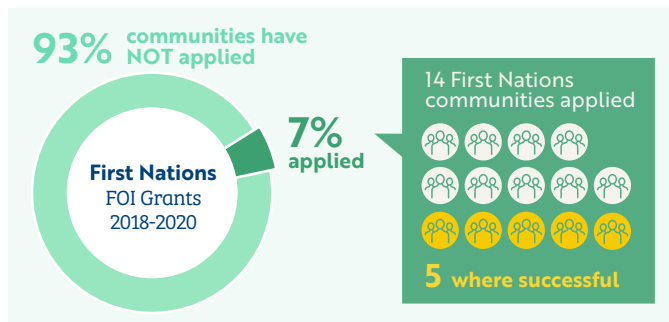
2. Who is not coming in the door?

British Columbia is home to about 12,000 charities — of which about 500 have applied for systems change funding since 2018. That means 96 per cent of charitable organizations have not engaged with systems change funding, keeping in mind, that many charities will not be doing systems change work. From an equity perspective, the question is: **which kinds of organizations, representing which communities, could and should be accessing systems change funding that are not?**

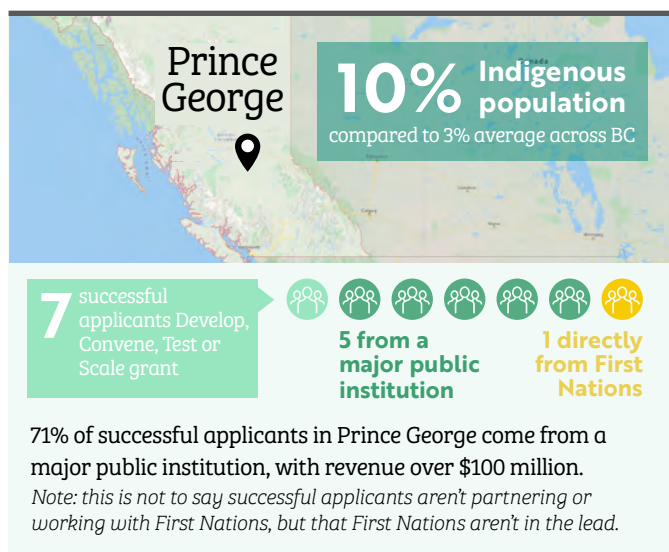


First Nations

Ninety-three per cent of British Columbia's 198 First Nations have not applied for a Develop, Develop Cohort, Convene, Test, or Scale grant over the last 2.5 years. Of the 14 First Nations who have directly applied for funds, 36% have been successful. This number does not take into account Indigenous organizations operating independently of First Nations.

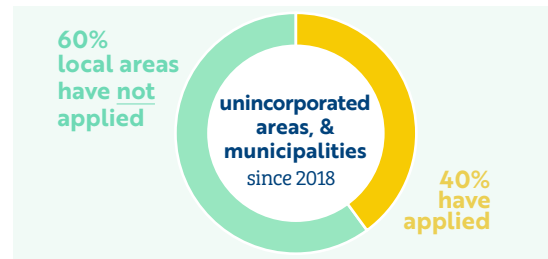


Zooming into localities with higher Indigenous populations, Indigenous-led applications are still a small percentage.



Small and rural communities

British Columbia has 190 municipalities and unincorporated areas. Excluding out-of-province applicants, it appears organizations from 78 different municipalities and unincorporated areas have applied for systems change grants since 2018. That leaves about 60% of local areas who have not come through the door, nearly all of whom are classified as small or rural.



3. Who is making decisions? What perspectives & positions hold weight?

Seventy-five community members volunteer their time as Community Advisors, spending upwards of 40 hours a year reading, scoring and discussing applications across a wide berth of issues -- from arts to the environment to health and social care. Advisors backgrounds reflect this sectoral diversity. Professional experiences are prominently featured in advisor bios.

Discourse analysis of 57 bios on the Vancouver Foundation's website shows that 89% lead with their professional credentials, while 14% also position their perspectives in terms of their lived experiences and personal values, including 3% who share their Indigenous cultures.



Choosing to share one's lived experience in a public-facing biography says little about people's actual life experiences, and perhaps more about an advisory culture that prizes formal knowledge and expertise. As one executive leader pondered:

"I think there is a formal, professional culture that I watch mirrored at all levels... As a new person, you look around, and think 'Oh, OK, that's how I act.' I think the culture leads people to listing their professional identity first. From the advisors I know, I think there is a decent amount of lived experience: sexuality, race, gender, and class maybe to some degree, but class would be hardest to know."

- Executive Leader

Framing Change

The existential core of a community foundation is, perhaps quite obviously, community. What's far less obvious is what defines community, and who speaks for community. Systems change grants give credence to organizations and sector experts.

When we build up organizations and sector experts, but take for granted the **informal and community-level interactions** through which values like equity are socialized, debated, and affirmed, we may (inadvertently) erode the ground that nurtures our social and political systems. That's the perspective of scholar *Bruce Sievers*, who positions community foundations as critical infrastructure for civil society. **Civil society** consists of both institutions (for rule of law, free speech, voluntary work, and free expression) but also of normative values such as commitment to individual rights, tolerance, and the common good. The health of the two are closely connected.

We see that during COVID-19, where both the strengths and weaknesses of our institutions and normative values are all too apparent. Robust institutions and organizations, high levels of trust and empathy, and nimble grassroots action are critical conditions for inclusive, community health.

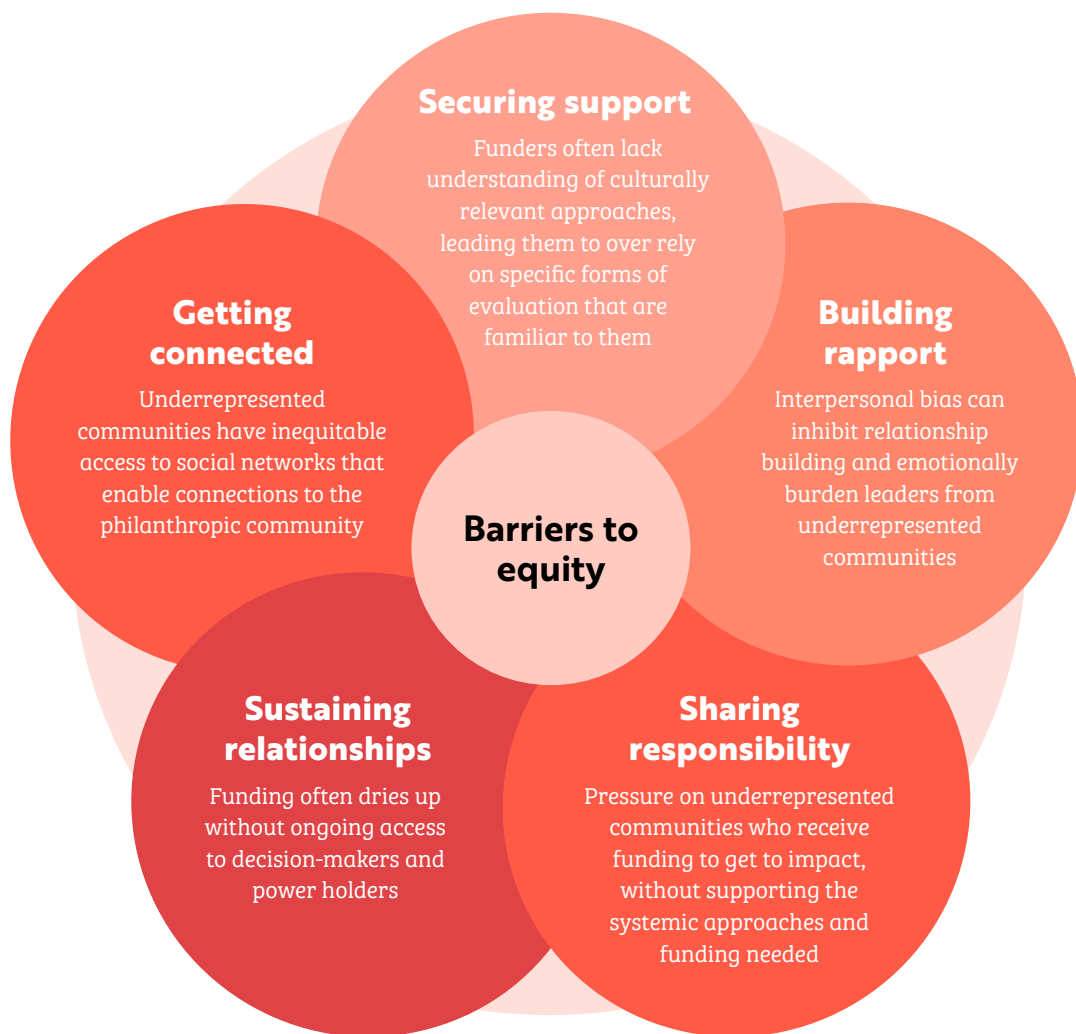
The Community Advisor role and decision-making process relies on the normative values of civil society (community members review and discuss applications with a shared desire to make equitable and fair choices for the common good), **but there is a real opportunity, especially now, to more actively nourish and host forums in which values can be identified, modelled, tested, and celebrated within and outside advisory committees.** *Sievers* argues that it is the normative, and not the institutional, side of civil society that is likely the vanguard of change for our generation after decades of comparative neglect.

How might Vancouver Foundation use systems change grants to host a community-wide inquiry into what it means to pursue equitable systems change?

Opportunities for Change

So, how might we use systems change grants to strengthen civil society, advance equity and deepen impact, especially in an era of COVID-19 and anti-racism?





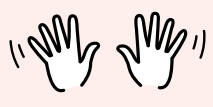
Research published at the beginning of May, by Bridgespan Consulting and Echoing Green, both exposes systemic underfunding of organizations led by people of color, and makes explicit what is standing in the way of equity. We can frame each of these barriers as opportunities for change, and generate concrete ideas for how to grow connection, support, rapport, shared responsibility, and ongoing relationships. Over the pages that follow, we set out scenarios for “what could be” with the intent of opening-up space for research & development. We don’t have “the” answer, but we do have starting points for action learning.



Heavily adapted from Cheryl Dorsey, Peter Kim, Cora Daniels, Lyell Sakaue and Britt Savage, "Overcoming the Racial Bias in Philanthropic Funding (2020)."

Six What Ifs

We can flip each of the barriers to philanthropic equity into opportunities for change, focusing on each phase of the grant cycle from outreach to application to assessment to funding and support.

Barriers ... Getting connected Open call can privilege organizations in the know and with capacity to knock. 	>	What If ... Opportunity #1: Front-end participatory process could hone focus, actively build networks and relationships. Grant phase: outreach
Securing support Two-stage written application process privileges one skill set and form of expression. 	>	Opportunity #2: Alternative application formats could allow for multiple forms of expression, along with decision-making tools & rituals. Grant phase: application
Building rapport Community Advisor process prioritizes professional expertise; valuable, but under-represented are people with lived experience of inequitable systems, limited financial means, and without organizational affiliations. 	>	Opportunity #3: Paid roles, feedback and learning for advisors could broaden and deepen perspectives. Grant phase: assessment
Sharing responsibility Funding applications one-by-one puts unrealistic pressure on individual projects for systems change, even though systems change is inherently relational. 	>	Opportunity #4: Assessing and funding projects as part of a whole could enable shared responsibility and collective effort. Grant phase: assessment
Sustaining relationships Hands-off funding limits learning, future opportunities and ongoing support. 	>	Opportunity #5: Learning loops and advocacy agendas could amplify organizational access & impact. Grant phase: support & influencing
Reckoning with the barriers to equity Moving towards equity is an ongoing commitment, not a one-time act.	>	Opportunity #6: Creating reflective spaces across departments and hierarchies to continue the hard work of equity. Grant phase: across all

What could we do to pursue each opportunity area? Next, we offer up 15+ small and big ideas. Each idea is a provocation, more than a fleshed out concept, intended to prompt discussion and further brainstorming. We will mock-up promising ideas with stakeholders and try them out, for a defined period of time, to learn what works and what doesn't, and what would be required for steady state implementation.

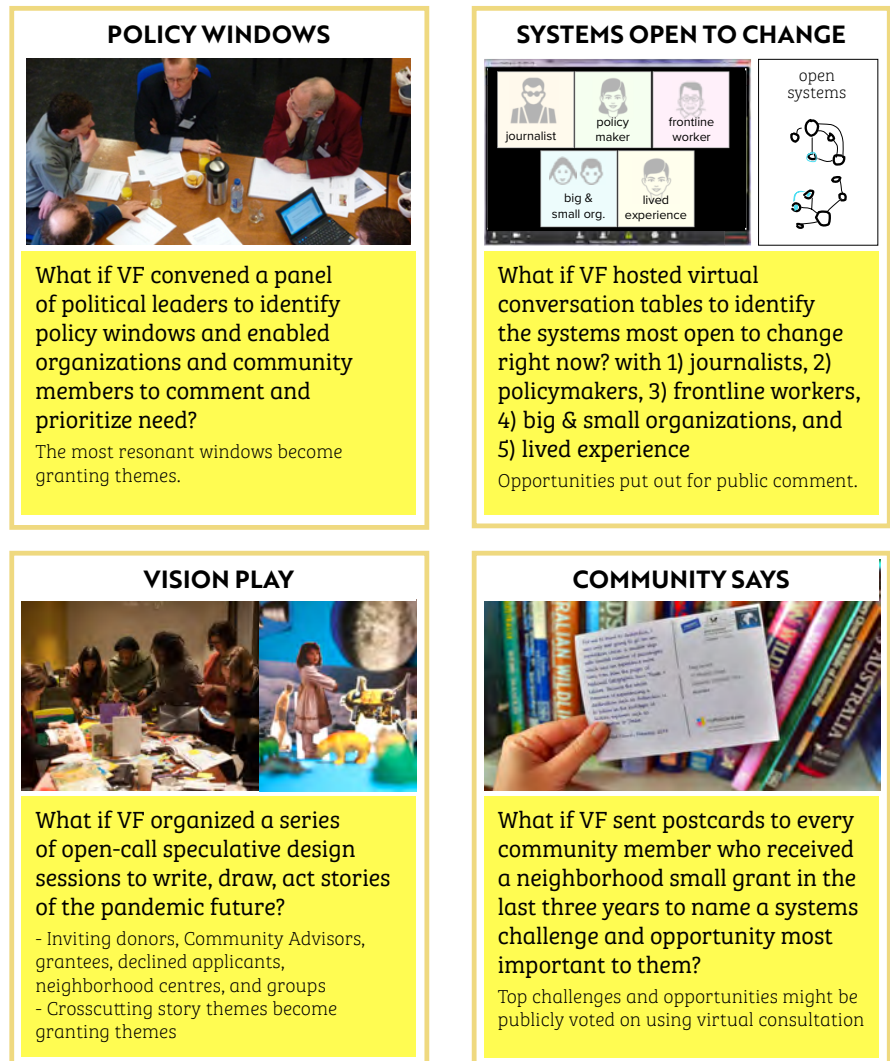
Opportunity space #1

Front-end participatory process to hone focus, actively build networks and relationships.

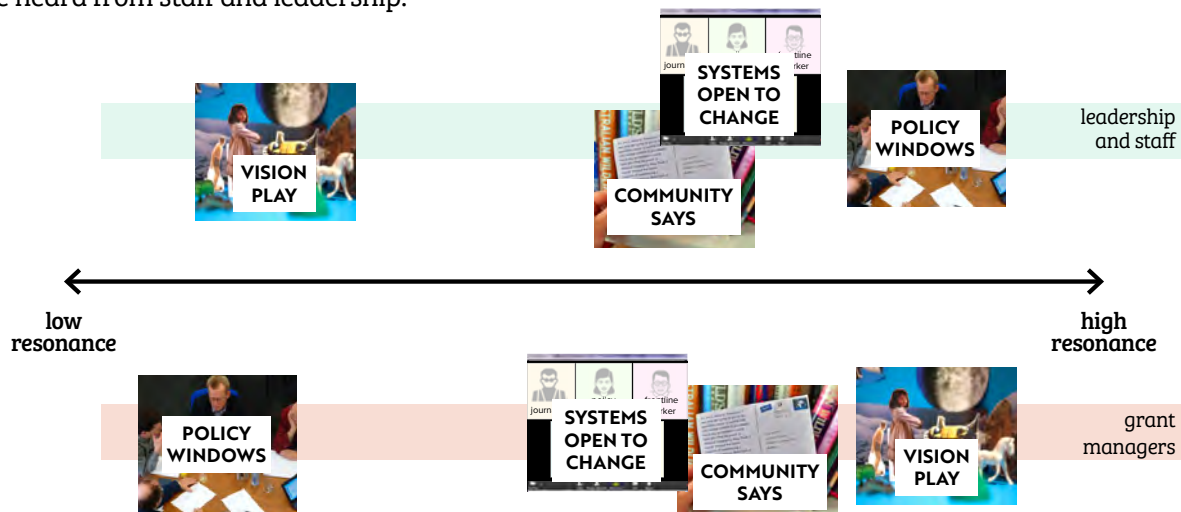
We want to learn:

- What does it take to engage the unusual suspects?
- Does engaging the unusual suspects lead to a different mix of applications?
- How do we build and broker relationships?
- What does it take to responsively (and meaningfully) prioritize where to put the focus?

This might look like:



What we heard from staff and leadership:



Opportunity space #2


Alternative application formats to allow for multiple forms of expression, along with decision-making tools and rituals.

We want to learn:

- How does changing the format shift who applies and the quality of systems change ideas?
- How does changing the format change conversations and decisions at advisory committees?
- What kinds of support do applicants need for different formats?

This might look like:

CHATTER BOX



What if the applications were recorded conversations with VF staff, individuals with lived experience, and peer organizations?

The edited transcripts from conversations can become the written record for advisors


STORY TIME



What if solutions journalists were hired to write applications for short-listed candidates so they were all in same voice and applicants had a product they could use?

Journalism stories based on interviews and documentation

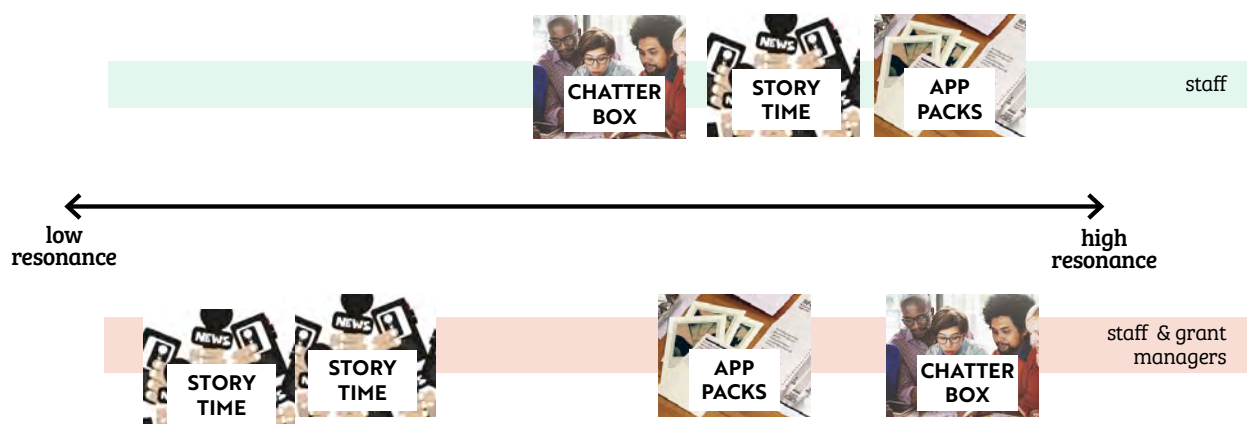
APP PACKS



What if applications came as a probe pack with fillable worksheets and tools to document and develop a system changing idea?

Could have a lot of optional elements, useful for engaging staff and community constituencies in process

What we heard from staff & grant managers:



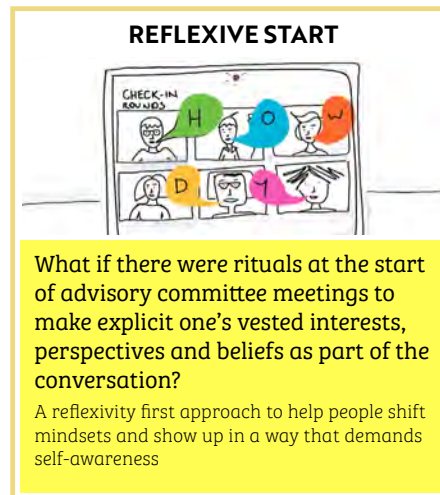
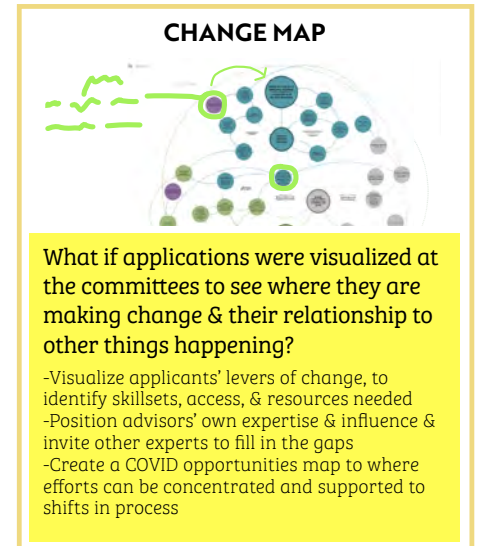
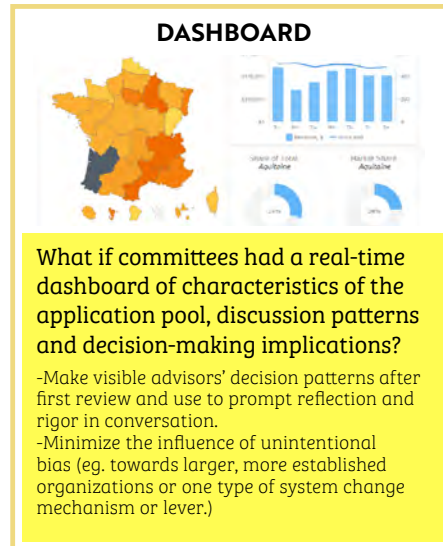
Opportunity space #3

Paid roles, feedback and learning for advisors to broaden and deepen perspectives.

We want to learn:

- How do visual tools shift the understanding of systems change levers?
- How do visual tools shift decisions at advisory committees?
- How does timely information about the distribution of funding affect decision making?

This might look like:



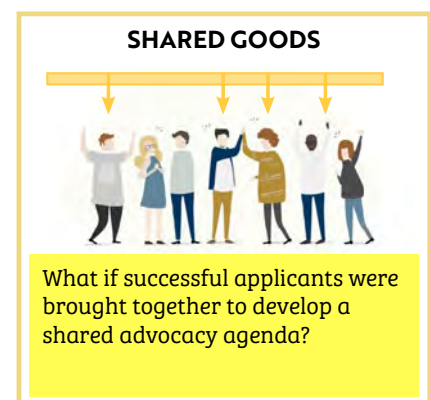
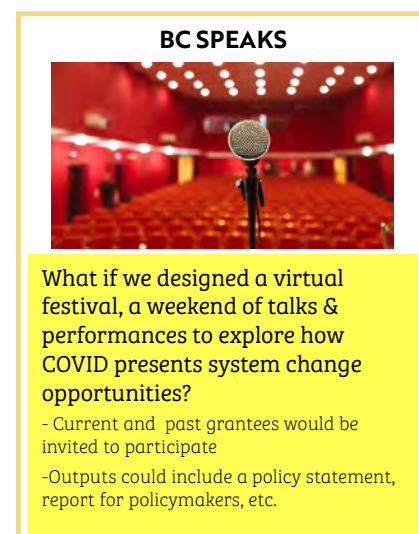
Opportunity space #4

Assessing and funding projects as part of a whole to enable shared responsibility and collective effort.

We want to learn:

- Can an advocacy agenda be more than the sum of its parts?
- Are feedback loops sufficient to help grantees shift from solution-focused to inquiry-focused action?
- Are grantees confident to report learning from failure?

This might look like:



Opportunity space #5


Learning loops and advocacy agendas to amplify organizational access & impact.

We want to learn:

- What perspectives could complement current Community Advisors?
- What value proposition would motivate advisors to engage more time in systems change learning and equity-seeking processes?

This might look like:


ADVISOR JOURNEY



What if the Community Advisor role was sought after as a hands-on, applied two-year learning experience in systems change?

What if the advisor journey was like a certificate program, with a credential, with learning alongside assessing grants?

EXPERIENCE CRITICS



What if people with lived experience had a paid role in the process and opportunity to refine understandings of equitable systems change strategy?

- Have conversations with applicants to learn more about their approach
- Share an appreciative inquiry back to organizations and advisors

Opportunity space #6

Creating reflective spaces across departments and hierarchies to continue the hard work of equity.

We want to learn:

- How can VF model equity-seeking behaviour?
- What are the conditions for open and honest conversation across levels and functions?
- What kinds of rituals and practices can foster shared understanding, language and reference points?

International Inspiration

What can we learn about participatory grantmaking practice from community foundations also grappling with systems change? While plenty of foundations bring community members into upfront processes to define funding priorities and make decisions, most are doing so in a bounded way: having already dedicated their funds to a particular population group, neighbourhood, or issue. Their specificity makes it easier to identify community members from the very communities the fund aims to serve, which is a core tenet of participatory grantmaking.

Community governance is less evident at foundations where systems change of any variety is the goal. Such a broad, and to some degree, abstract mission makes it hard to determine the right people to set agendas. Sector experts and professionals often drive decision-making, rather than “every day” community members most affected by the issues, many of whom have no organizational or professional affiliation. **The opportunity is for Vancouver Foundation to find fresh ways to bring together professional expertise with community engagement.**

Case study: Brooklyn Community Foundation's Brooklyn Elders Fund shaped by diverse elders



Practice: Participatory agenda setting

The fund's strategy and priorities were developed through *Elders Insights*, a series of 15 listening sessions with over 150 older adults across the borough, followed by two roundtables with experts from the elder care sector. The data and stories collected through the process led to the selection of three funding focus areas.

Practice: Values based advice

Members of the affected communities make granting decisions, through the Brooklyn Elders Fund Advisory Council, which is made up of community members aged 54-77. Their biographies focus on values, motivations, and lived experience -- rather than profession, education, or credentials.



"I remember when my family was denied access to purchase housing because of our color. So at the age of 10, I promised myself to always live in my own community and make it better."

Selma Jackson, Bedford Stuyvesant

"I have been a community activist from my teen years. I don't feel people should just complain but be involved in creating change. I've been arrested twice for protesting injustices."

Vera Reid, East New York



Case study: Lankelly Chase invests in inquiry-led action based on a vision of how more equitable systems behave

Lankelly Chase

UK-based Lankelly Chase Foundation funds process, over solutions. They invest in inquiry: deep learning about how to create the conditions of a system with equitable behaviours. Lankelly Chase has identified core behaviours that help systems function better for people facing severe and multiple disadvantages. They fall under three headings -- perspective, power, and participation -- and consist of descriptions of healthy, equitable systems. For example, decision-making is devolved: "Those people closest to a complex situation are free to engage with its uniqueness and context and to use their initiative to respond to it."

Practice: Funding attached to a process, rather than a solution

Rather than investing to reach a particular solution, like a policy change, they invest in shared inquiries about how to improve the "fitness of a system" such as "How do we build a field of people capable of analysing and disrupting systems?" They don't believe that single projects or actors have the capacity to move the needle, so instead, they support inquiry processes that engage multiple actors, with the intent of holding space for system behaviours to be tested, understood and promoted.

The Denver Foundation looks inward to increase inclusivity



In an attempt to create space within the foundation for productive learning and dialogue on complex issues, the Denver Foundation created an internal community of practice, whose members (from all departments) meet quarterly to learn about and discuss topics of interest.

Practice: Internal investments in common reference points

A staff book club features racial and LGBT issues, and a film club hosts discussions about economic equity. An inclusiveness committee organizes training and serves as a source of culturally and racially diverse new leaders among staff. This inside-out approach conceptualizes equity and inclusion as a learning journey, rather than an outcome.

Grantee Perspectives

We reached out to 10 current grantees to start a conversation and temperature check early ideas: what could be the role of the Foundation moving forward, how might grantees engage with a participatory process, and what have been the effects of COVID-19?

Thanks to the help of Kiri Bird, we engaged a cross-section of current develop, test and scale grantees in 45-minute conversations -- seeking out small and large organizations, urban and rural organizations across multiple fields of interest. Organizations included:

- LINC (Longterm Inmates Now in the Community)
- CCPA (Canadian Centre for Policy Alternatives / Centre Canadien Depolitiques Alternatives)
- Whistler Centre for Sustainability Institute Society
- Dzawada'enuxw First Nation
- Simon Fraser University - RADIUS
- Inter-Cultural Association of Greater Victoria
- Kootenay Employment Services Society
- Lillooet Area Library Association
- Gathering Voices Society
- Nelson Civic Theatre Society

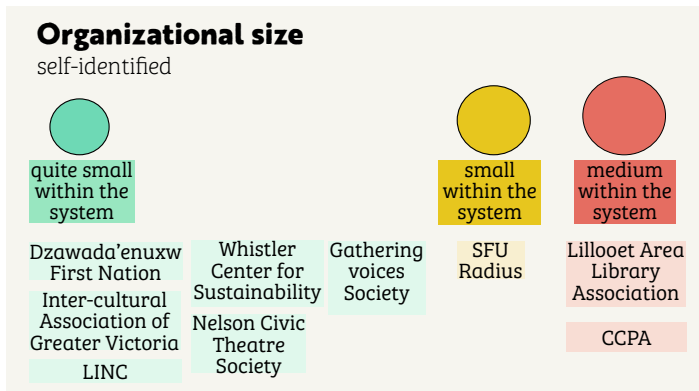
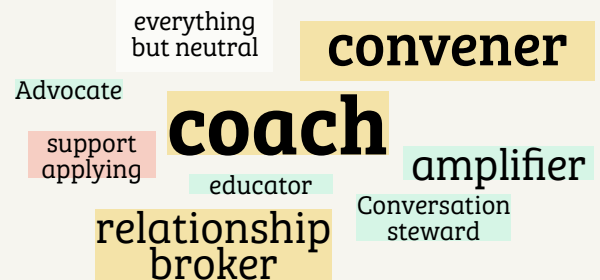
Perceived role

All grantees asked about whether they would like to see Vancouver Foundation play a more hands-on role said 'yes,' to some degree. The most cited roles for VF to consider -- in addition to the funder role -- included coach, convener, advocate and amplifier. Educator (such as in the arts develop cohort) and relationship steward were also mentioned. As a relationship steward, VF might make introductions between grassroots groups and charitable intermediaries, acting in a mentorship capacity.

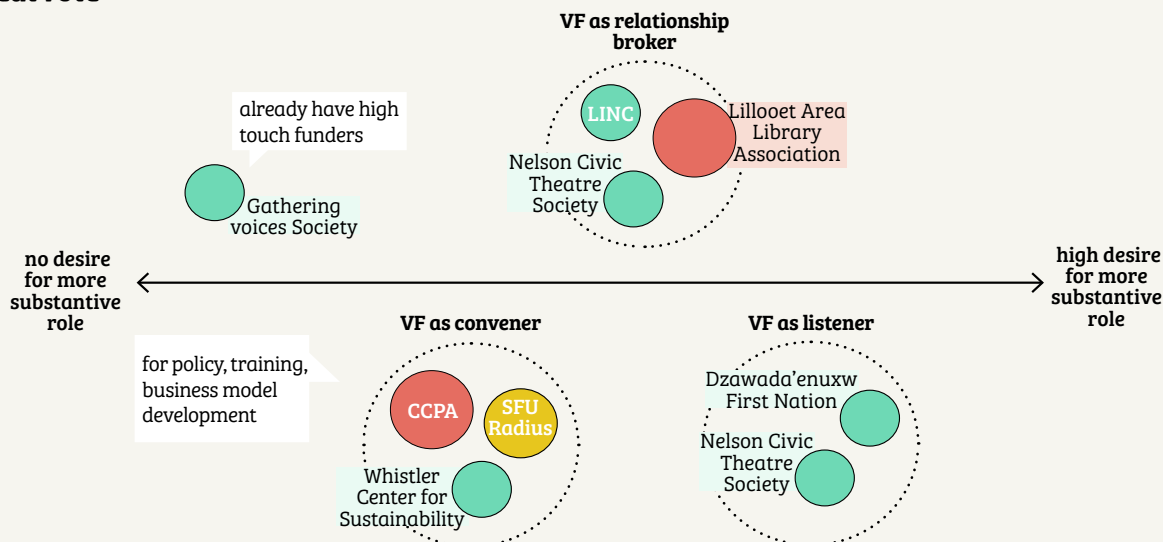
Some organizations explicitly did not want VF to be a neutral decision-maker. While a handful of grantees acknowledged the importance of the open call to diversify who comes to the door, they would like the Foundation to put some flags in the ground and advocate around pressing issues. The idea of a parallel process or bifurcated organization came up twice.



Ideal VF role



Unpacking ideal role



Participatory process design

Grantees expressed willingness to participate in an open priority-setting process, and also identified what might keep them from taking part. Many offered to connect us to their local networks. From their input, we imagine a good participatory process would:

- Get past gatekeepers to talk to people impacted by initiatives directly
- Offer a range of ways to engage, including light-touch interactions and deeper engagements
- Recognize professional and family life is a jumble at the moment, and allow for flexibility or even whole-family engagement
- Use a range of modalities, not just relying on Zoom or digital platforms that can be exhausting and exclusive

Emerging issues

For grantees, COVID-19 has heightened the urgency to:

Go deep

- Pursue deeper questions about power and inequity
- Advance anti-racism work

Go local

- Incentivize investment in local economies, highlight Indigenous ways of doing business, and position investment co-ops as critical infrastructure
- Return to the land and gardening practices

Go to the margins

- Get people out of prison
- Address food insecurity and gender-based violence
- Re-imagine private elder care and transit for seniors
- Creatively respond to social isolation

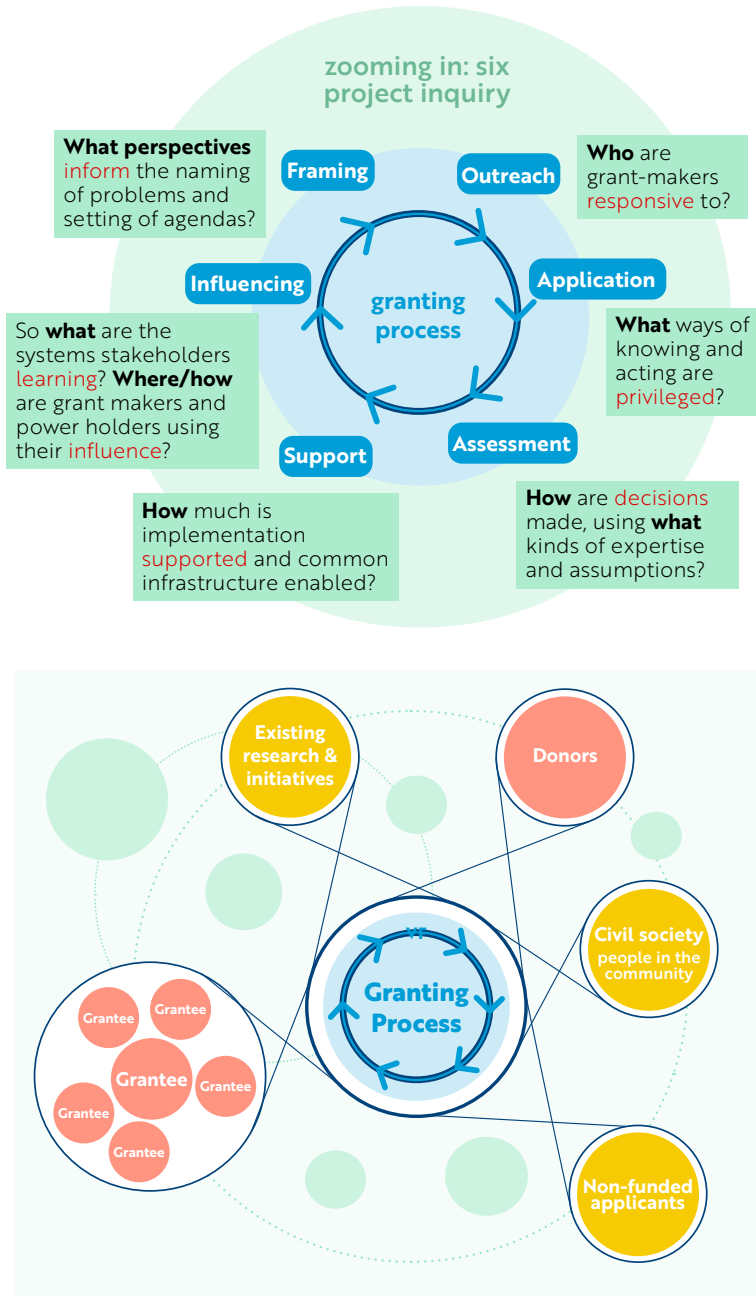
Embed policy

- Preserve policies that have been introduced in areas like: safe drug supply, precarious worker pay, free transit, etc

Appendix

Process

The specific recommendations from the Systems Change Grantmaking Evaluation we are responding to:



Evaluation report recommendations

Outreach

Rec 6

Increase access to promising initiatives led by underrepresented communities regardless of proposal development capacity

Rec 7

Make Systems Change Grants accessible and meaningful for indigenous communities and initiatives

Influencing

Rec 3

Continue to build internal knowledge on systems change and apply throughout the grants program

Rec 4

Influence other funders to support systems change work and to improve their granting practices to better meet the needs of community organizers

Rec 5

Leverage the connections and influence of the Foundation to make connections between power holders working on systems change

Rec 12

Share achievement and big-picture learning through external communications and engagement

Assessment

Rec 2

Connect other parts of the Foundation to Systems

Application

Rec 8

Streamline the application process to emphasize the most important function at each stage

Support

Rec 9

Provide mentorship and skill building on systems change

Rec 10

Support relationship brokering and convening in a limited number of fields based on need and momentum

Rec 11

Develop and improve a Systems Change Grant monitoring and evaluation strategy

Notes on Data Calculations

Geographical distributions

The 2016 census tells us that the current population of BC totals 4,648,060. Of which, 2,873,700 (62%) live in large urban cores, 597,525 (13%) in medium population centres, 544,910 (12%) in small population centres, and 631,855 (14%) in rural areas

Definitions

A population centre has a population of at least 1,000 and a population density of 400 persons or more per square kilometre, based on population counts from the current Census of Population. All areas outside population centres are classified as rural areas. Taken together, population centres and rural areas cover all of Canada.

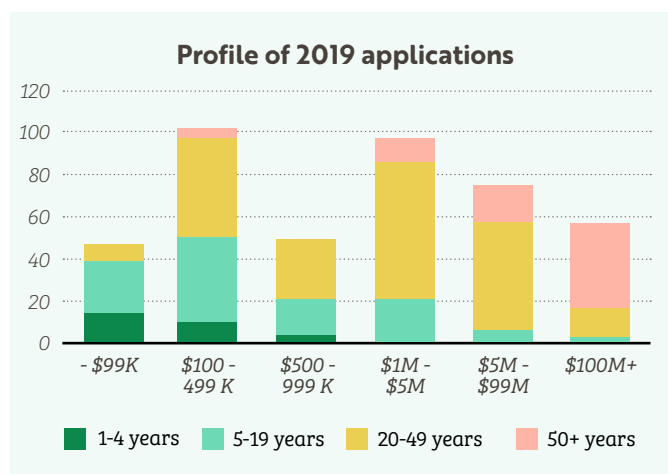
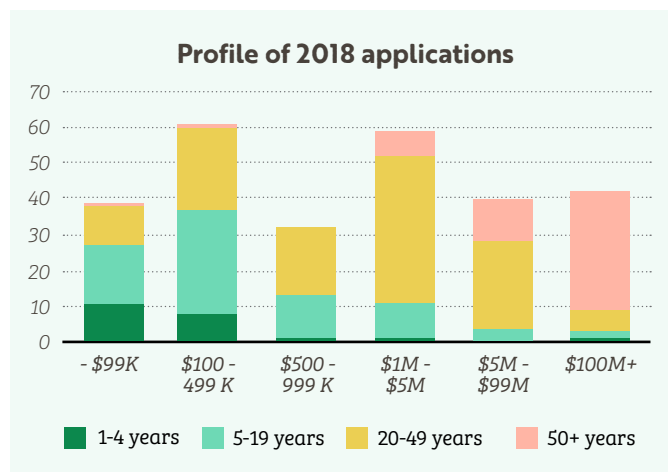
- *small population centres*, with a population between 1,000 and 29,999
- *medium population centres*, with a population between 30,000 and 99,999
- *large urban population centres*, with a population of 100,000 or more.
- *Rural areas (RAs)* include all territory lying outside population centres. Taken together, population centres and rural areas cover all of Canada.

Age and revenue distributions

Application Profiles:

The charts below represent total number of applications submitted to FOI Grants in 2018 and LEVEL & FOI Grants in 2019 organized by the applicant organization's annual revenue and year registered with CRA as posted in their T1330 forms. All annual revenue data was pulled from their respective year of file, excluding 20 applicants who has yet to file at the time of this report, their 2018 annually reported revenue was used instead.

Our largest group of applications come from organizations that sit in the \$100k - \$499k & \$1m-\$5m annual revenue established 20-49 years ago. The 20-49 years group also represents the largest group in most annual revenue categories excluding \$100m+. Also notable is that the \$100M+ revenue applications are only made up of 9 organizations while the \$0-99K represent 25 unique organizations in 2018. 2019 showed a similar pattern.



Success Rates:

We initially assumed that organizations with the largest budgets and the most experiences are more likely to receive grants from the Vancouver Foundation. While they're most certainly well represented in applications. Their success rates seemed to have dipped from 2018 – 2019. There is almost a clear drop across the board except for organizations with \$100k-\$499k in annual revenue and some organizations with at least 5 years of experience.

2018 Rates of Success	\$0-\$99K	\$100K - \$499K	\$500K - \$999K	\$1M - \$5M	\$5M - \$99M	\$100M+
1-4 Year	36%	25%	N/A	0%	N/A	0%
5-19 Years	44%	28%	25%	10%	25%	50%
20-49 Years	36%	39%	32%	24%	46%	17%
50+ Years	N/A	0%	N/A	43%	57%	45%

2019 Rates of Success	\$0-\$99K	\$100K - \$499K	\$500K - \$999K	\$1M - \$5M	\$5M - \$99M	\$100M+
1-4 Year	29%	40%	50%	N/A	N/A	N/A
5-19 Years	8%	25%	29%	0%	33%	33%
20-49 Years	13%	28%	32%	29%	23%	29%
50+ Years	N/A	20%	N/A	18%	18%	25%



Thanks for reading
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