

NORTH CAROLINA COLLABORATIVE FOR STRONG LATINX COMMUNITIES

The North Carolina Collaborative for Strong Latinx Communities (NCCSLC) brought together 15 leaders to be part of a Unifying Council that led their first participatory grantmaking process in North Carolina. This Council was formed by 11 Latinx leaders representing the East, West, the Triangle and Triad regions, and organizations with statewide reach; in addition to 3 members of supporting foundations.

The purpose of this Council was to create a more equitable process in which Latinx leaders who are leading their communities to improve the rights and life of Latinx North Carolinians were part of the funding decision making table.

The organizations and groups that received grants as a result of this process are Latinx serving organizations that have Latinx leadership; organizations that have demonstrated strong connections and collaborations with other Latinx communities across the state; and organizations that work to build long-term power in the state's Latinx community.

Over five months and five extensive virtual meetings, the Unifying Council completed the process to award financial support. The Council's work plan was comprehensive as it included developing agreements and processes for the proper functioning of the group and the process. The council worked hard to achieve the following:

- Step 1: Develop/refine values, group agreements, conflict of interest
- Step 2: Edit and approve requests for proposals (RFPs)
- Step 3: Clarify due diligence process
- Step 4: Support the distribution of the RFP
- Step 5: Review and score applications
- Step 6: Review, discuss, and finalize list of grantees recommended for funding
- Step 7: Provide feedback during one-on-one meetings with consultant documentation
- Step 8: Attend a debrief meeting at the end of the process

This process could not have been achieved without the coordination and leadership of Zulayka Santiago, who prepared the content of the meetings, facilitated the conversations, and provided technical assistance to the council members and organizations that applied for the scholarship.

Documenting the participatory grantmaking process

Through individual interviews with Council members, a consultant documented the process. During these meetings the members shared their reflections, learnings, and suggestions to improve this process. Initially, it was proposed to include images taken by the members of the Council as part of the documentation of the process, but the results that were expected were not achieved. In retrospect, more in-person training is necessary and should be provided for members to better understand the concept of Literacy Through Photography.

Strengths of the participatory process

- **This Unifying Council led their first participatory process and is now a model for shifting power dynamics.** The Council knew that the process would not be perfect as it was the first time being done, but they understood the importance of this work and were committed to giving their best with a good attitude, sharing their opinions, and emotions. One participant shared, *"It will not be a perfect process the first time, but it is about time it was carried out this way and decisions were taken from the foundations."* Council members walked together building this process. This process reflected the diverse Latinx community and brought those very important voices to the decision-making table.
- **Council members received a lot of support and opportunities to share suggestions and reflections.** Zulayka constantly listened to the group's suggestions and was a great facilitator in the process. Indeed, as one council member stated, *"We came into the process with our eyes closed and Zulayka held our hands."* She fostered a lot of trust to help members express their needs and created moments of silence to give opportunity for more comments and reflections. She always came into meetings prepared and with questions that helped the Council make decisions and think critically. There were moments when strong opinions were shared and that brought up heavy emotions from the participants. This was a natural and understood part of the process given the shared lived experiences the council members have with the issues being discussed. Zulayka managed the space in the best possible way validating feelings and redirecting the group to the goal of the council.
- **This process was very important to the Latinx leaders that participated because for many years they had been asking to be part of a decision-making process that is usually led by foundations.** These leaders are closer to the impacted communities and many are part of them, which is why they have a greater understanding of the needs, priorities, and solutions to problems of the Latinx community. Most had never been in the funding decision role. The leaders recognized the efforts of the foundations to finally listen to their recommendations and to be included in this process and they appreciate the space that was created. One participant reflected on this reality: *"Finally, a process was done that included us as a community and it must be repeated, we hope it's not something they do once."* The way in which the Council was formed to be part of the process from beginning to end demonstrated that it was done with a true intention of inclusion and of shifting the power to the communities, as it intended.

- **The Council was formed by Latinx leaders with different experiences, work backgrounds, education levels, age, and from different regions of the state.** This richness made the space and conversations more diverse and brought different points of view and diverse lived experiences to the table.
- **Involving grassroots leaders** in this process was important to truly reflect the diversity of the state's working immigrant communities. One council member emphasized these groups generally *"receive less funding and less engagement as they are not from established organizations."* It was important that these groups are supported with funds when possible but also that they are supported and invited to this type of process. These leaders bring a lot of expertise and experience to this type of space and can share their knowledge with others as they are the ones doing the work on the ground in their communities.
- **There is renewed hope that foundations will rethink how they approach equity through these kinds of participatory processes to ultimately expand access to resources for grassroots groups.** A repeated theme from interviews focused on the barriers to receiving funding from traditional philanthropy. The application requirements usually consist of a long list of cumbersome requirements. A common refrain heard in this evaluation process was *"Grassroots groups don't have the resources for someone to help us write scholarships."* While grassroots groups have experience and expertise when it comes to community outreach, they usually have no paid staff with grant writing experience.
- **The documentation of the process was critical and well received by the Council.** One council member stated: *"this documentation process helps us create stories and models, I have learned a lot by reflecting during this conversation, and I am grateful for the opportunity."* Documenting the process proved to be invaluable to reflect on collective and individual lessons learned for the group. It was especially important to document the journey of a new process being conducted for the first time. Ultimately, it helped participants share what they learned, their suggestions to improve the process, and reflect on why they got involved in the immigrant movement in the first place.
- **There were many long conversations, but it was very important that everyone understood. Having patience and listening to each other was powerful** *"It is not like other meetings; we take the time to listen. This job is not as simple as it seems to be."* This process brought Latinx leaders closer and gave them the space to meet other groups and organizations that represent various parts of the state. Council members learned a lot from each other and built relationships. *"Money does not equal success. It is the networks between groups, the relationships, the support and the training that make them stronger."*

Opportunities to improve the participatory grantmaking process

- **A lot of information was shared in the meeting, causing members to feel overwhelmed at times trying to process everything shared.** The Council worked very hard and kept a fast pace in order to make decisions and distribute funds in the midst of a

pandemic, when the community needed it most. It would have been helpful to have more opportunities to have discussions in small groups in order to allow members who tend to be quieter or who are introverted to have more opportunities to share and engage in the process. These discussions could also help control the more dominant voices, and to give space to digest the information in smaller groups.

- **The time allotted to complete this process was challenging. Ideally, the Council would have had more time to carry out the selection process. Many members noted that they “...need time to get to know the organizations better or we will be repeating what the traditional applications process does. People in community work need a different model.”** The meetings were long, and they had to move quickly. In addition, the diversity of the group required more time to get to know each other better, to be able to understand the information, especially because Council members came with different levels of understanding of the grant-making process. This created another layer of challenges that was felt by all in the group. As one member noted, *“a process like this requires more time to meet and discuss the organizations and grant decisions.”* Finally, some members would have liked to be even more involved in preparing materials and agendas between meetings in order to increase their participation and provide more input.
- **The Council wanted greater input on decision-making models used in the selection.** Several members suggested presenting information using **popular education** to learn from the knowledge that members bring to the space. A lot of time was spent discussing the difference between consent and consensus and it could have helped to use more **examples, videos, or stories** and training in general so that participants had different options for understanding the information.
- **Council members suggested a refined application that reflects the true need of the project proposed.** There are insufficient funds to support all the organizations and groups that applied for funding. **It is important that the applications reflect an accurate budget for their work and that they do not ask for more than they really need.** Foundations have helped to push organizations to ask for more funds because they often are given less. Members saw this as an obstacle for better decision making on their part: *“there are organizations that need 20k, but they asked for 60k. We need to know the true amount they need to get the job done and so we can make better decisions. So that no one leaves without anything.”* This way, a greater effort could be made to support more organizations.
- **Strengthen the role of the Council members.** Strengthen the requirements for leaders who are part of this process. Provide more opportunities to receive training to improve their role in this process, and to strengthen their work as leaders. Indeed, the majority of Council members believe *“this Council has the potential to continue growing and improving the immigrant movement in Carolina.”* In addition, some members would have liked to have more clarity on the methods, logistics and processes that would be used to distribute the funds to avoid confusion and conflicts. The process can be improved based on the learnings of each grant cycle that is carried out.

- Success depends on the “forming and norming” of the group to build trust and rapport. Unfortunately, due to the COVID-19 pandemic all the work was carried out virtually. Group activities could have been better if they had been in person. **When the pandemic is over, some of future activities should be in person.** Council members felt this gap as well, believing *"we are a warm community, family-centered, and very social and it would help us a lot to meet in person to get to know each other well as colleagues in the movement."*
- **Put more effort into improving the RFP to be clearer what type of organizations and groups the Council is looking to support to reduce the number of applications received.** In an effort to broaden and simplify the application to remove barriers, details were not included to clarify what types of organizations and groups would be supported. One Council member stated, *"it would help to have a meeting before the Council met to finalize the RFP so ensure everyone had the information they needed before making decisions on how to improve the RFP and have more time to think it through."* Suggestions from Council members include creating a section of frequently asked questions on the website so that organizations and groups interested in applying can obtain more information to avoid receiving applications from organizations that did not align with the intent of this fund.
- **Improve the grant selection process.** All grant applications should be carefully reviewed without giving less consideration to organizations that are not very well known as their size or popularity might not reflect the good work they may be doing. It will be important to continue improving how Council members who reviewed applications present information to the rest of the group, perhaps by standardizing frameworks for presenting information. Those who reviewed any given set of applications can give a summary for others to ask questions based on the information presented so that more people have the information they need to comment and clarify their concerns. Overall, having more training on decision-making frameworks and how to present information in a standard and clear, concise way before the meeting would help facilitate a better process.
- **Refine conflict of interest policy.** Council members have different points of views on accepting or not accepting applications from organizations whose leaders are part of the Council. More conversations are necessary to inform this decision. If it is decided to continue giving the opportunity to apply to organizations whose council members are part of, the conflict-of-interest policy should be improved and clarified.
- **Continue working to improve values, confidentiality, transparency, accountability, respect, and promotion of collective work.** All of this will continue to be an important foundation for the Council's work.

Looking Ahead

It is difficult not to be inspired by what transpired over the course of this grant process. The purpose of Unifying Council was to create a more equitable grant-making process where Latinx leaders—who are leading their communities to improve the rights and life of Latinx North Carolinians—had a seat at the funding decision-making table. While this process felt uncomfortable and messy at times, all members of the Council leaned into the discomfort to be part of a participatory practice that felt paradigm shifting. This is true despite navigating unprecedented circumstances created by Covid-19, with each member of the Unifying Council giving their time, wisdom, and commitment to ensure the needs of the Latinx community were brought to the forefront. The funds granted are supporting groups and organizations that have been uplifting their communities in a time of so much need.

The lessons learned through this participatory grantmaking process served as a necessary journey for both participants and philanthropy to begin experimenting with and implementing new practices that shift power dynamics between a funder and community it serves and democratize decision-making. Ultimately, this was a first step for philanthropic partners in North Carolina to reimagine participatory models that are truly inclusive and rooted in equity. Lessons learned and feedback from participants can and should guide future participatory processes to continue to develop stronger communities.