



**EMERGING
REFLECTIONS
FROM THE
GLOBAL
ADVISORY
PANEL
PROCESS**



**EQUALITY
FUND**



SETTING THE SCENE¹

In mid 2020, the Equality Fund launched its inaugural call for proposals **Catalyze**—our first global **feminist funding opportunity**. *Catalyze* offers a window into the unprecedented threats facing women’s rights and feminist organizations, and focused on making funding accessible to feminist groups most in need of support. *Catalyze* prioritizes those that are advancing anti-racist, anti-colonial, and intersectional agendas. The *Catalyze* funding program also responds to rights crackdowns and supporting women, girls, youth, non-binary people, and LGBTIQ human rights defenders, addressing violence at multiple levels, and promoting economic justice.

To honour our long held belief and commitment to solidarity, accountability, and transparency to feminist movements, we worked to create a community-informed grantmaking process. At the heart of this process was a Global Advisory Panel—a tremendous group of ten feminist leaders—to support the Equality Fund to make informed decisions for the *Catalyze* program.

To create this model, we drew on good practice and learnings from the participatory grantmaking and participatory philanthropic fields. Over the course of eight months, we designed and implemented a community-informed process to make decisions on funding through our *Catalyze* grants program. By the end of May 2021, the first round of grantmaking was complete, ending the cycle with an assessment process focused on learnings and a panelist celebration.

Through a dynamic partnership, between the African Women's Development Fund (AWDF) and the Equality Fund, AWDF led a call for proposals across the African continent, ultimately selecting **42** grassroots feminist organizations for funding. The Equality Fund led a call across Asia, the Pacific, Latin America, Eastern Europe, and the Middle East, selecting **30** new grantee partners. **Together, the 72 grants total \$4,365,632.**

As the Equality Fund has a commitment to transparency, learning, and motivating others who want to shift power in philanthropy, this report aims to share some of the learnings and adaptations along the way.

ABOUT THE AUTHORS

In their role as critical thought partners, participatory grantmaking coaches, and practitioners coming from years of moving resources to grassroots movements, Ruby Johnson and Katy Love accompanied the Equality Fund’s team to create their first community-informed process. Ruby and Katy were invited to advise and support the creation of the process, offering good practice, learning from their experience, creative ideas, and guidance to the Working Group in a collaborative effort. Ruby and Katy also led an effort to document the process and served as facilitators for the process review and learning assessment—creating a final report and recommendations based on the panelist experience to date.

1. This introductory text was drawn from other Equality Fund announcements, and credit goes to Swatee Deepak and Devi Leiper O’Malley as well for some of the language.

METHODOLOGY

To create this report, Ruby and Katy conducted a series of conversations, surveys, and workshops with the Equality Fund's Global Advisory Panel, receiving feedback and input directly from nine of the ten panelists. Eight of the panelists also completed an additional survey. From these data points, we have put together a series of takeaways and recommendations for the team to take forward.

TOP TAKEAWAYS

1. Overall satisfaction: All panelists we spoke with shared how much they appreciated and truly enjoyed the EF team and EF staff support—who were called "warm and professional". Panelists felt proud and happy to be part of this process. Congratulations for stewarding such a beautiful process; it is clear there is so much love and respect for the EF team!

"I felt very honoured to be invited, and privileged. I learned a lot—from my colleagues, from the process, and from the proposals. I felt I was part of an important big thing, that EF is important for several reasons. I felt very taken care of by EF people, who were very professional and close."

– Panelist

- 2. Panelist workload and effort:** Overall, the process was well organized and well structured, and the workload was about right for panelist participants. Many expressed that they enjoyed the proposal review process and enjoyed learning about contexts beyond their own. However, some felt out of their depth as they did not have specific knowledge of the regional context and would have benefited from more context.
- 3. Timeline and timing:** The timing of the proposal review (December/January) and amount of time received some mixed feedback, with some opportunities for improvement. For some panelists, the timing at the end of year worked alright, but most preferred to move this timing to another time of the year. The amount of time allotted for the panelist proposal review was adequate for some, but it was not long enough overall for others. The deliberation meetings could be expanded in order to offer more time for meaningful and joyful engagement.
- 4. The tools:** The scoring tool and deliberations ranking tool were greatly appreciated and noted to be designed to encourage objectivity. Panelists appreciated some of the creative tools that allowed them to tap into their hearts and minds—although one panelist felt that made their experience feel less objective. While some slight improvements were suggested by panelists, such as ensuring that all groups that they review meet certain criteria, overall panelists felt that the tools and scoring were a key step as a starting point for a more in-depth discussion.

"It feels like a privilege to not just document your thoughts, but also the interactions. It was an emotional experience."

– Panelist

- 5. Panel engagement:** All noted how much they loved working with the full panel and wanted to maximize their interactions with the group, especially in the orientation events and in the deliberations meetings. Further, all participants valued their deliberations in pairs and felt there were opportunities to build on these connections. Several panelists also noted that they needed more time to work together in a meaningful way, and some were left with feelings of guilt or insufficiency.
- 6. Grant portfolio:** While panelists reported an overall feeling of satisfaction with the grants made, panelists noted several specific groups, regions, and communities were not funded in the end. These identified groups overlapped consistently with groups that are at the margins: migrants, domestic workers, indigenous peoples, women with disabilities, and more. Panelists noted specifically the Pacific, the Caribbean, and Central Asia as gaps geographically. Panelists shared their willingness to support outreach efforts. Women's funds in particular can play a strong role here, and see ways to collaborate on concrete spaces and communication tools.

SURVEY RESULTS

In addition to the conversations and/or workshops that most panelists attended, many also offered their feedback through a survey. Eight of the ten panelists completed the survey.

Here are the results:

- 90% felt the process timeline was reasonable—meaning they felt they had enough time to accomplish the tasks—and 10% said it was somewhat reasonable.
- 90% felt they made a strong connection to other advisors and/or the panel as a whole and 10% felt they somewhat did.
- 100% of respondents said they felt that the amount of work they did as panelists was the right amount.
- 90% felt the scoring matrix was a good tool for deliberations and helped them make decisions, while 10% felt it could be improved.
- 100% felt that communication, preparation, and support from EF staff was what they needed, with one person adding they felt it was absolutely brilliant!

"Thank you. It was a great experience and a journey. While being a panelist I really felt cared and connected to the EF. The matrix and instructions are great. Thank you for being able contribute and to benefit."

– Panelist



"From an admin point of view, the process was clear, brilliantly managed, and delivered. My only ask would be that, if panelists agree it would be positive, we build in a little more intra-panel interaction, either through the buddying process (which I failed on, possibly because of the holiday period and also my buddy wasn't a co-reviewer on applications I was reviewing), and/or having more time in the panel meeting (maybe a marginally longer panel meeting—time zones allowing) for discussions and agreement between reviewers."

– Panelist

"I enjoyed being part of the process: from the moment of being recommended as an advisor to the moment meeting incredible feminist activists from different parts of the world as well as reconnecting with those who I knew and worked with before."

– Panelist

RECOMMENDATIONS: TO KEEP + TO CHANGE

TO KEEP

- **Orientation:** panelists loved the videos and the time they spent together as a group early on. These investments paid off in creating a connection between the panelists.
- **Care and intentionality throughout the process:** people loved the energy, the support, and the creative elements that were scattered throughout.
- **Honoraria:** panelists were particularly grateful for this.
- **Staff support:** all panelists shared an appreciation for EF staff support and engagement.
- **Deliberations (beyond voting):** Panelists appreciated that this process, as opposed to others some had participated in, went beyond scoring. They appreciated the deliberations and conversation. Keep making time for analysis, reflection, and conversation!
- **Scoring:** Panelists appreciated the exercise and rigor of scoring proposals by the criteria proposed. They used this individual scoring task as a milestone by which to review proposals by the deadline and organize their review.
- **Feedback/reflections:** Continue to make space at the end of each round to hear from the panelists, what they liked and didn't like, in the name of continuous improvement! And share back with stakeholders.

TO CHANGE

- **Scoring:** While the Equality Fund team will never achieve a perfect scoring tool, we recommend refining the scoring criteria for the next round and increasing the support you make available during this period, focusing on understanding our own biases and power. The scoring tools could also reduce the number of criteria for panelists.
- **Increase outreach:** Many panelists noted the groups and communities who were missing from the shortlisted groups. Consider engaging panelists in outreach and increasing outreach efforts to those underrepresented in the final portfolio. The Caribbean, Central Asia, and the Pacific were specifically flagged. Language barriers were also flagged as a challenge, in particular Russian.
- **Increase panel engagement:** Panelists loved spending time together, and we suggest connecting people before the deliberations. Consider creating a buddy system that goes throughout the process so they can build their trust and relationship. Furthermore, the deliberations need and deserve more time to deepen the experience as a transformative one.
- **Share about the due diligence process:** Panelists need to understand what steps are happening when, and some high-level details on the process and, if possible, results.
- **Guide the panelist experience:** Create an infographic about the process to orient and guide panelists, especially highlighting where the panelists are needed and/or making decisions. This may help support the panelists as to where they are during the process and what is upcoming next.

"I'd suggest the Equality Fund strengthen relationships with sister women's and feminist funds both working internationally and nationally in order to establish some sort of referral or recommendation system. This system could facilitate the outreach process towards eligible feminist organizations and ultimately contribute towards the sustainability of feminist movements that often need long-term resourcing."

- Panelist

ADDITIONAL REFLECTIONS AND NEXT STEPS

- Overall, the planning and investment from Equality Fund staff really showed; the process was well designed and thoughtfully run. The care and intentionality you have woven into this process shows.
- This process validates the importance of going beyond the scoring tool, and using it as a starting space for discussion. Political depth and transformative work happen outside of individual scoring.
- The Equality Fund can consider how it might support field-building and contributing to live learnings on participatory models—including paying homage to where models come from and sharing back what you learned in the service of supporting others to learn more quickly, experiment, and adapt. A moment is happening around women's funds and philanthropy on experimentation of participatory models and the Equality Fund has a role to play in supporting this evolution.
- To deepen the practice of exchange between the women's funding community, we recommend EF builds and connects with the 5 womens funds that were part of the Advisory: *Anisha (Women's Fund Asia), Laura (Fondo de Mujeres del Sur), Saadat (FRIDA Fund), Pontso (AWDF), and Michelle (Fiji Women's Fund)*. Perhaps they could be invited to follow up separately or connected in the design of the next funding stream.

"Appreciation for all the amazing work done by folks at EF pulling together this process."

– Panelist





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