EVALUATION OF THE PILOT OF CENTERING COMMUNITY VOICE

A BLUEPRINT FOR INCORPORATING LIVED EXPERIENCE IN THE GRANTMAKING PROCESS

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EXECUTIVE SUMMARY

Centering Community Voice: A Blueprint for Incorporating Lived Experience in the Grantmaking Process was created to address structural inequities that result from power imbalances in the grantmaking process. It provides a set of principles, tools, recommendations and action steps to shift power dynamics in grantmaking by increasing the influence of individuals in underserved communities. The framework and tools included in the blueprint are the result of a rigorous review of the literature and best practices for promoting equity, justice, and inclusion. In addition to an in-depth review of the literature, development of this document was informed by conversations with and surveys of community-based organizations and southeastern Michigan residents.

While community voice has come to play a greater role in the decisions of funders and grantmakers through approaches such as participatory grantmaking, questions exist about which tactics are most effective and the effects of increasing lived experience in the funding process. To gain clarity around these issues and to gather feedback on the document itself, the United Way of Southeastern Michigan, Detroit Future City, Cities Reimagined, and Mpowrd Analytics partnered to launch a pilot of Centering Community Voice: A Blueprint for Incorporating Lived Experience in the Grantmaking Process with three funding organizations working in the southeastern region of Michigan. The pilot and the corresponding evaluation provided evidence to assess how engagement with the blueprint and the incorporation of lived experience

influenced the funding process. Specifically, the pilot and the evaluation were designed to improve understanding of (1) the opportunities and challenges that shape the incorporation of lived experience and (2) outcomes associated with increasing community voice. Additionally, given the subjective and contextual nature of lived experience, the evaluation aimed to draw on the experiences of pilot participants to articulate a definition of the term that could be operationalized into robust and generalizable metrics.

The findings in this report provide support for the theory of change that underlies the principles and tools in the blueprint. Evidence indicates that experience doing equity work, organizational capacity, a willingness to incorporate lived experience, and a window of opportunity are all preconditions for successful incorporation of lived experience. Findings from the evaluation point to leadership buy-in as a component of willingness that significantly impacted the successful incorporation of lived experience for all organizations who participated in the pilot. The evaluation also indicated that time was one of the most critical aspects of organizational capacity shaping outcomes of the efforts of pilot participants. Where time is limited, efforts to incorporate lived experience are constrained.

Evaluation findings point to clear impacts resulting from an organization's implementation of the tools and principles outlined in the blueprint. Evidence from the pilot of the document indicates reflection on internal policies and procedures, shifts in tactics for engaging community members, and expanded support for

efforts to increase lived experience are all consequences of implementing the blueprint's recommendations. Data from the evaluation also served to identify key characteristics of an operational definition of lived experience. Common characteristics across definitions of lived experience in use by pilot participants, surfaced the following definition of lived experience: an individual with lived experience has the background, identity, and day to day experiences aligned with common needs and problems experienced by members of communities being served.

The following report presents detailed data and findings from the evaluation of the pilot of Centering Community Voice: A Blueprint for Incorporating Lived Experience in the Grantmaking Process. The report begins by introducing the pilot project and the research questions that guided the evaluation. The next section provides an overview and background on the blueprint, including a description of the blueprint's theory of change. After introducing the blueprint and the pilot project, the next section specifies the evaluation methodology, including methods of recruitment, case selection, data collection, and analysis. The report then presents findings aligned to the research questions and learning objectives for the pilot project. Finally, the document ends with a summary of conclusions and recommendations.

INTRODUCTION

Across our country funders have increasingly come to recognize that addressing inequities within society requires systems change targeting historic and structural determinants of oppression and discrimination. Despite this recognition, and concerted efforts of grantmakers to address inequities, demographic factors such as race, gender, and income continue to predict divergent outcomes across individuals and communities in the United States.

Centering Community Voice: A Blueprint for Incorporating Lived Experience in the Grantmaking Process was created to address structural inequities that result from power imbalances in the grantmaking process. It provides a set of principles, tools, recommendations and action steps to shift power dynamics in grantmaking by increasing the influence of individuals in underserved communities. The solutions offered in the blueprint rest on the foundational assumption that reducing societal inequities necessitates understanding the lived experiences of individuals in target communities. While this assumption is coming to be more widely adopted by the philanthropic community, questions remain as to what is required to incorporate more lived experience and what the effects of increasing lived experience might be.

In order to provide initial responses to these questions, the United Way of Southeastern Michigan, Detroit Future City, Cities Reimagined, and Mpowrd Analytics partnered to pilot the blueprint with three funding organizations working in the southeastern region of Michigan. The pilot

and the corresponding evaluation provided evidence to assess how engagement with the blueprint and the incorporation of lived experience influenced the funding process. Specifically, the pilot and evaluation process were designed to improve understanding of (1) the opportunities and challenges that shape the incorporation of lived experience and (2) outcomes associated with increasing community voice. Additionally, given the subjective and contextual nature of lived experience, the evaluation aimed to draw on the experiences of pilot participants to articulate a definition of the term that could be operationalized into robust and generalizable metrics.

To gather information on the implementation of the blueprint's tools and principles as well as provide a generalizable method for operationalizing and defining lived experience, the research process focused on answering the following questions:

- *How do grantmakers define and operationalize the concept of lived experience? What are common characteristics across definitions that could be used to develop robust and generalizable metrics of the term?*

- *How usable is the blueprint? What challenges and opportunities do funders face in applying the tools in the blueprint?*

- *What does evidence suggest about the impact of the blueprint?*

Findings from the evaluation of the pilot of the blueprint provided answers to the research questions outlined above. Evidence indicated common characteristics across the definition of lived experience in use by

practitioners. For participants in the pilot process, individuals with lived experience were those with the background, identity, and day to day experiences aligned with common needs and problems experienced by members of communities being served. In terms of usability of the document, pilot participants' experiences indicated that the document's framework accurately mapped onto the granting cycle for organizations that employ a traditional funding process. The blueprint's roadmap provided clear insight into where and how lived experience could inform decisions around the creation of calls for proposals, the review of grant proposals, and methods of community engagement throughout the funding cycle. While participants noted that the information in the blueprint was easily digestible and provided the shared language needed to advocate for the incorporation of more lived experience, multiple individuals noted that reviewing the document in its entirety and considering how to implement its recommendations took significant time. Across all pilot participants, time and leadership buy-in were identified as the most significant factors shaping users ability to integrate more lived experience into their work. Evidence of impacts of engagement with the blueprint demonstrates that reflections on the operationalization of lived experience and the adoption of new strategies for community engagement were outcomes observed for all organizations that participated in the pilot.

What follows is a presentation of data and findings from the evaluation of the pilot of Centering Community Voice: A Blueprint for Incorporating Lived Experience in the Grantmaking Process. The report begins by providing an overview and background on the blueprint, including a description of the blueprint's theory of change. The next section describes the pilot project and evaluation process, to specify methods for selecting participant organizations, collecting data, and analyzing results. The report then presents findings aligned to the research questions and learning objectives for the pilot project. Finally, the document ends with conclusions and recommendations.

PROGRAM MODEL AND THEORY OF CHANGE

BLUEPRINT BACKGROUND AND OVERVIEW

Centering Community Voice: A Blueprint for Incorporating Lived Experience into the Grantmaking Process was created to provide readers with a framework and toolkit to enable organizations at all levels to integrate lived experience into every aspect of decision-making within the funding process. While philanthropic organizations are the anticipated primary users of this document, the principles that are outlined and the tools that are offered are also valuable for community-based organizations promoting equity and systems change.

The blueprint was jointly authored by Detroit Future City and United Way for Southeastern Michigan with support from the National Fund for Workforce Solutions. The framework and tools included in the blueprint are the result of a rigorous review of the literature and best practices for promoting equity, justice, and inclusion. In addition to an in-depth review of the literature, development of this document was informed by conversations with and surveys of community-based organizations and southeastern Michigan residents.

The process of data gathering for the creation of the blueprint asked community members to identify what was needed from the document. Listening sessions and survey responses surfaced the following goals for the document. The first goal was to create a document that provided a "plug and play guide" to build the capacity of team members in philanthropic organizations to adopt more inclusive and equitable practices. Another goal was to create a guide that allowed users to bridge gaps in service provision, while also promoting

systems change in target communities. Finally the document was created to provide a set of tools applicable to grantmaking and funding procedures.

The document that resulted from these efforts is intended to support funders and community-based organizations by providing a set of tools to improve data gathering, decision-making processes and the influence of lived experience on funders' decision making. The hope is that Centering Community Voice: A Blueprint for Incorporating Lived Experience into the Grantmaking Process fosters a collective effort that increases the influence of the lived experiences of under-represented individuals and communities.

The blueprint begins by providing a framework for specifying how lived experience can be incorporated into the funding process to produce systems change and shift power dynamics in grantmaking. Central to the framework is the primacy of lived experience. The blueprint begins by providing a definition of lived experience. The central argument is that incorporating lived experience produces long-term progress towards equity by increasing the agency and capacity of communities to disrupt systems of oppression. The framework is followed by a toolkit that includes assessments to evaluate where users are on their journey to incorporating lived experience and to facilitate the creation of an action plan for implementing inclusive practices within target organizations. The document concludes with a library of tools and resources to allow users to integrate lived experience throughout the grant cycle.

THEORY OF CHANGE
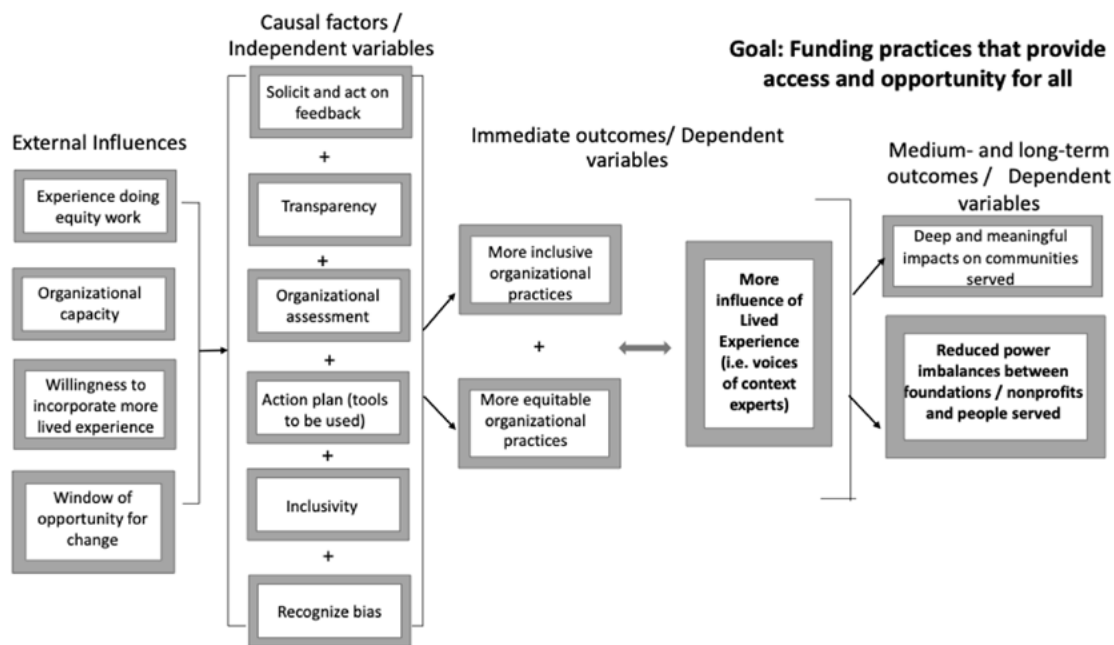
The framework, tools and guidelines offered in the blueprint are intended to provide a pathway for organizations to incorporate lived experience into their work, so that more meaningful changes are realized for individuals served and power imbalances between funders and individuals served decrease. Individuals with 'lived experience' have an intimate understanding of both community inequities and community assets. They offer invaluable knowledge and perspectives that can help organizations co-design programs and services, build stronger relationships, and improve grantmaking processes to better meet the needs of target communities.

In order for organizations to be successful at incorporating lived experience, a set of pre-conditions must be true. Organizations must have some level of experience doing equity

work, they must have the capacity to change and adapt internal practices, there must be a willingness to integrate more lived experience, and there must be an opportunity to create more equitable internal policies and practices. The assumption is that if all of these conditions are met, then an organization will be able to implement the tools and principles outlined in the blueprint.

Centering Community Voice: A Blueprint for Incorporating Lived Experience into the Grantmaking Process identifies a set of internal factors needed to increase the influence of lived experience in the funding process. These are soliciting and acting on feedback, openness and transparency, an organizational assessment, an action plan, inclusive practices, and a recognition of bias. If all of these factors are present, the consequence will be

more inclusive and equitable organizational practices that allow for more influence of lived experience in the funding process. When there is greater influence of lived experience in the funding process, there are more meaningful changes in the communities being served and power imbalances between funders and individuals served decrease.

Evaluation of the blueprint pilot sought to critically assess the logic behind this theory of change. By focusing on identifying the presence of preconditions, the manifestation of internal organizational factors, and effects on the inclusivity and equity of internal practices to engage lived experience, evaluation findings serve to assess the validity of the above theory of change based on the experiences of pilot organizations. Specifically the questions being asked in this study about current practices, challenges and opportunities funders face in applying the tools in the blueprint and the impact of the blueprint, provide evidence of the relationship between funders' organizational context and the influence of lived experience on the grantmaking process.

DESCRIPTION OF THE PILOT PROJECT

The goal of the pilot project was to conduct a comprehensive evaluation of the equity blueprint in order to determine the effectiveness of the document in helping funders to better incorporate the voice of the community throughout their grant making and decision-making processes. The pilot project was a three month effort (June - September of 2021) that involved engaging philanthropic organizations in southeastern Michigan to

introduce the blueprint, encourage use of the blueprint, and seek commitments to participate in the evaluation.

Engagement and outreach targeted philanthropic organizations within the region of southeastern Michigan. Emails were sent to a list of twenty eight organizations. Organizations varied in type and substantive focus and included groups that identified as community based organizations, corporate foundations, family foundations, community foundations, and multi-national foundations. In addition to email introductions to the blueprint and the pilot project, engagement involved one on one meetings with eleven individuals from seven philanthropic organizations to walk them through the blueprint and introduce the pilot project. Pilot participants were recruited via an intake form that captured data on their interest in participating in the pilot project. Once recruited, evaluation team members reached out to interested organizations to request participation in the pilot evaluation. Those who participated in the pilot process committed to completing a pre-survey, using at least one tool in the toolkit, meeting with the evaluation team to provide feedback on use of the tool(s), and to completing a post-survey.

DESCRIPTION OF THE EVALUATION PROCESS: DATA COLLECTION AND ANALYSIS

This evaluation sought to study the impacts of engagement with the blueprint on funding organizations. Specifically, evaluation of the pilot project was designed to provide data on how funders define and operationalize the concept of lived experience, usability of

the blueprint, challenges and opportunities influencing implementation, and impacts of engaging with the blueprint. The method of data collection and analysis that was employed were informed by the following objectives:

- *Conceptualize and develop robust metrics for lived experience*

- *Understand the "useability" of the blueprint*

- *Understand challenges and opportunities in the application of tools in the blueprint*

- *Establish a foundation of evidence for the impact of the blueprint*

The evaluation took place over a four month-period. During this time an evaluation plan was created in collaboration with key stakeholders and data was collected from six individuals who agreed to review and provide feedback on the blueprint as well as share their experiences of implementing principles and tools included in the document. These six individuals represented three funding organizations.

All organizations who participated in this study were granting organizations headquartered in and/or targeting Detroit and the region of southeastern Michigan. Questions asked during the data collection process were carefully developed to align with the research objectives and theoretical lens of the evaluation. Data collection proceeded in three phases. The first phase of data collection was designed to collect baseline data from piloting organizations using surveys with closed and open-ended questions. These questions provided data on preconditions for successful implementation of the blueprint including understanding of lived experience, experience

doing equity work, organizational capacity, willingness to incorporate lived experience, and the existence of an opportunity to implement tools and/or principles from the blueprint. Surveys also asked questions about causal factors theorized to influence the outcomes of incorporating lived experience into the grantmaking process. Surveys asked for data on the presence and manifestation of the following causal factors: soliciting and acting on feedback, transparency, completion of an organizational assessment, inclusiveness of practices, and recognition of bias. Finally, the initial phase of data collection served to gather baseline data on the outcomes of interest, the inclusivity and equity of internal practices, and the incorporation of lived experience. In sum, the goal of data collection during phase one was to identify where pilot organizations began in terms of each component of the blueprint's theory of change. The second phase of data collection consisted of in-depth interviews with program leaders from each pilot organization. The goal of data collection during phase two was to gather data on implementation and impact as it related to engaging with the blueprint. The third and final phase of data collection included a post-survey which served to measure any changes to pilot organization's practices, the incorporation of lived experience, and understandings around key concepts included in the blueprint.

This evaluation employed the method of case studies analysis to conduct structured, focused, comparisons across three organizations that participated in the pilot of "Centering Community Voice". The structure of the approach is reflected in the use of research

objectives to inform and standardize data collection. The focused nature of this method ensured that data collection included only aspects of each case that mapped directly onto our theory of change. The overarching goal of employing this method was to draw conclusions that could be applied to guide application of tools and principles in the blueprint to a general population of funders and grantmakers. This method draws on explanations from each case of fundmaking to identify common experiences and draw conclusions across cases to inform a more general theory of change as well as specify the conditions for and consequences of incorporating lived experience into the funding process.

To evaluate the theory of change that underlies the blueprint, the pilot project sought to enlist organizations with the preconditions for impact. Thus, the process of case selection identified organizations with experience doing equity work, a willingness to incorporate lived experience, the capacity to implement internal changes to organizational practices, and the presence of a window of opportunity to facilitate change. In order to allow for evaluation of the impacts of the blueprint, cases were selected to ensure that the preconditions of success were present across all participating organizations. While the method of case selection held constant the preconditions specified in the theory of change, the identification of pilot participants produced a sample with variation on internal practices identified as the causal factors theorized as leading to more equitable and inclusive practices. There was variation across organizations in terms of practices to

solicit and act on feedback, transparency, the completion of an organizational equity assessment, tools in use to incorporate lived experience, the inclusivity of current practices, and the recognition of biases that shape methods of community engagement and internal operations. By identifying commonalities in experiences and outcomes across organizations with diverse internal practices, conclusions from this evaluation are presumed to be generalizable to a wide range of organizations that meet the preconditions specified in the theory of change.

DESCRIPTION OF PARTICIPATING ORGANIZATIONS

Representatives from three funding organizations participated in the pilot of Centering Community Voice: A Blueprint for Incorporating Lived Experience into the Grantmaking Process. In order to protect the anonymity of participants in the evaluation process, descriptions of pilot participants will omit information that may serve to identify individual organizations. For the purposes of this evaluation partner organizations will be referred to according to the type of funder they are. The first partner organization is a community foundation, the second pilot organization a family foundation, and the third pilot organization a multinational foundation. The community foundation is a long-standing fixture in the region of southeastern Michigan, with a large team and multiple departments working to distribute funds across a range of issue areas. The family foundation is a small team with a long history of working to alleviate poverty in southeastern Michigan. Finally, the multinational foundation is a large organization

with a small staff supporting community development and civic engagement in Detroit specifically.

To understand how the selection of participants for the pilot map onto the theory of change for the blueprint, baseline data is presented to describe each organization in terms of their experience doing equity work, organizational capacity and willingness to incorporate lived experience, and the presence of a window of opportunity to increase the influence of lived experience on the funding process. Across the sample of pilot participants there were diverse levels of engagement with the blueprint and variation in the degree to which current practices allowed for the influence of lived experience in the grant cycle during the pilot period.

All organizations who participated in the pilot of the blueprint agreed that they had experience doing equity work. While all organizations had experience doing equity work, there was variation across entities in how deeply equity had been embedded into their practice. The multinational foundation had not only centered equity in their work, but it had also "built it into" their mission, vision, and internal procedures. The community foundation had explicitly centered equity in internal and external communications around their work, but only in the last year had they begun the work of applying an equity lens to all programs and internal procedures. One respondent described the work at the community foundation in the following way: "Equity is front and center in terms of outcomes, but we're trying to rework our processes to be more equitable." For

the family foundation, staff had engaged in several focus groups locally and nationally, as well as internally, that related to increasing equity in various facets of their work, but discussions about integrating equity into internal operations and granting processes had only recently begun. Among pilot participants the multinational foundation had the most experience incorporating lived experience, while the family foundation had the least.

Baseline data pointed to variation across organizations in terms of capacity and willingness to incorporate lived experience into their work. While all organizations in the sample had both a willingness and some level of capacity to incorporate lived experience, differences were observed in the degree to which this was currently being done. For the multinational foundation the incorporation of lived experience was foundational to their approach of community engagement. Their "grounded" approach included "deep listening" and cooperating with community members so that they "can develop the narrative" that shapes funding decisions. Given the centrality of lived experience, the representative from the multinational foundation affirmed that in this organization there was the capacity to incorporate lived experience. This is distinct from the context of the community foundation. While a number of staff within the community foundation had begun implementing practices to increase lived experience, evidence indicated that capacity to do this work varied across departments. And while all individuals who participated in the pilot had the desire and technical resources to incorporate lived experience, multiple individuals from the

community foundation recognized consistently being "understaffed and overstretched" constrained their ability to implement new practices. Finally, the representative from the family foundation emphasized not only a willingness to incorporate lived experience, but also a commitment to doing so "properly". It was affirmed that the foundation had the capacity to build in lived experience and that the team was currently "engaged in deep learning and reflection to understand how to do this appropriately". Data on capacity and willingness across pilot participants indicates that the multinational foundation had already deeply embedded this into their approach, that the family foundation was in the process of deciding how to make lived experience central to their funding process, and that the community foundation had the willingness to increase lived experience, but that the capacity to do so varied across departments.

All organizations who participated in the pilot of the blueprint affirmed the presence of a window of opportunity to increase lived experience in their funding practices. For the multinational foundation the window of opportunity for change was described as always open. In the words of their representative, the foundation is "constantly reviewing and analyzing how [they] approach equity and justice, both internally and externally." The window of opportunity at the community foundation was identified as coinciding with a directive from high-level leadership to advance equity in all facets of their work. This commitment to advancing equity corresponded to both a strategic planning "sprint" at the foundation as well as intentional efforts across department leads to implement practices for increasing community voice in the grantmaking process. At the family foundation the articulation of a statement on racial justice had led to a commitment to make internal changes in support of their public statement. These efforts produced internal reflections and "active engagement with peers and external consultants for inspiration and guidance on how to incorporate lived experience" into their work.

EVALUATION FINDINGS

The process of data collection and analysis employed in this evaluation aimed to provide empirical evidence to develop an operationalizable definition of lived experience, to gather feedback on the content and structure of the blueprint, to identify common challenges and opportunities to incorporating lived experience, and to understand how engagement with the blueprint affected internal practices of funders. What follows is a presentation of findings from the analysis of qualitative data drawn from the experience of six individuals working across three funding organizations. Individuals who participated in the evaluation had distinct roles in the funding process. Results are presented in accordance with the research objectives for the pilot and the corresponding evaluation. The discussion of results begins with a presentation of data on definitions and experiences of incorporating lived experience. Next data on participants' feedback on the blueprint is presented to show results in terms of the usability of the document. The third section of findings presents results on the challenges and opportunities that influence whether and how lived experience is incorporated into the funding process. The discussion of results concludes by presenting evidence on the impacts of engaging with the blueprint for participants and pilot organizations.

DEFINING AND INCORPORATING LIVED EXPERIENCE

One objective of the evaluation was to better understand how funding organizations define lived experience in the context of their work. The goal was to not only articulate the definition of the concept in use by funders, but to also arrive at an operational definition of lived experience, one that could be translated into metrics of success. Collectively, questions asking about an individual's baseline understanding of lived experience, how their organization is incorporating it, and how those things have both changed through engagement with the blueprint, were used to inform the operational definition of lived experience that emerged from the evaluation.

The blueprint begins by providing the following definition of lived experience: "Lived experience describes the expertise that comes from a person's past or present experiences; this level of expertise provides context to a given issue. People with lived experience are also called context experts". While all participants recognized the value in having a shared definition of lived experience, multiple individuals noted this definition could not be easily operationalized into metrics that allow for determining whether the experiences being incorporated sufficiently reflect those of individuals most affected by the funding process. One pilot participant commented that, "Just because you bring individuals to the table with the background/experience you desire, it doesn't necessarily lead to meaningful participation or authentic contributions". Thus, to be most effective in producing systems change, funders must be operating with a definition of lived experience that can be easily translated into metrics that serve to assess the representativeness of the lived experience they seek to include.

Commonalities stood out across individual definitions of lived experience. All pilot

participants noted that lived experience included the background, identity, and day-to-day life experiences of individuals. They also noted that in the context of funding organizations the individuals' lived experience they were most interested in were from communities being served and/or affected by the problem being addressed. Taken together these insights suggest that an operational definition to guide selecting and identifying individuals with lived experience should include seeking out individuals with the background, identity, and day to day experiences that align with common needs and problems among individuals in the communities being served.

While all organizations in the sample valued incorporating more lived experience into their work, data indicates that there is significant variation across organizations in the way that this is being done. In the community foundation a specific department had been created with the goal of integrating lived experience into the organizations' funding processes. In the multinational foundation lived experience was fundamental to all organizational decision making since the beginning of their funding efforts in Detroit. In the family foundation, there was significant understanding and experience incorporating lived experience for key staff, but this experience had yet to be translated into changes to policies and practices within the organization. Evidence from across the experiences of pilot participants reflected significant variation in the degree to which lived experience influenced all aspects of the granting process.

BLUEPRINT USABILITY

To understand the usability of the blueprint and aspects of the document that challenged implementation, data collection asked participants to describe strengths of the document, to identify components they were implementing in their own work and to identify what additional information was needed to ensure that the tools and principles outlined in the document were adopted.

Multiple individuals identified that the general organization and presentation of the document made the information easy to digest. Everyone who participated in the pilot said the language of the document was clear and easy to understand. At the same time, two participants made mention of the density of the information being a challenge for some readers. One participant recognized that their ability to implement the blueprint in their own work was heavily influenced by having ample work hours dedicated to solely reading and digesting the document's frameworks and guidance. Another participant noted that while they were highly motivated to read the document in its entirety, this is not likely the case for all funders. Both of these participants suggested it would be valuable to separate the blueprint into distinct documents that could be applied at different stages of the funding process.

Some specific value-adds of the document that were named included centering and beginning the discussion around a clear definition of lived experience, providing common definitions of terms, and a shared framework for understanding where and how to incorporate lived experience into the funding process. One

individual acknowledged that the blueprint provides "a starting point to reflect and justify doing things differently". Another pilot participant who was working on the pre-grant process for the first time in their career noted that the blueprint helped "understand a shared language for that process" and it illuminated what factors needed to be considered. Across all participants there was recognition that Centering Community Voice: A Blueprint for Incorporating Lived Experience into the Grantmaking Process provided a valuable starting place for establishing shared definitions and understanding of how the incorporation of lived experience can produce more equitable grantmaking.

Across pilot participants, data indicated two key areas where improvements could be made to facilitate the use of the document. One was in the area of concrete examples. All pilot participants mentioned that tactical examples of the application of tools and principles in action would be helpful for envisioning applications to their own work. Another area that was identified was the need for additional information on key aspects of the grantmaking process. The first was on designing metrics. While many participants recognized the challenge inherent in creating metrics for equity and lived experience, the majority of individuals in the pilot said that knowing how to go about creating metrics for both equity and lived experience was imperative to reflecting on and assessing the fidelity and impacts of efforts to engage more lived experience. The second area where participants recognized a need for additional support was how to engage board members

to increase the influence of lived experience on internal practices and decision making. Multiple participants recognized that the support of board members was pivotal to ensuring that changes to internal practices were broad and comprehensive. It was noted that the blueprint did not provide specific recommendations on how to involve the board in shifting internal policies and procedures.

Evidence on the usability of the blueprint indicates that pilot participants found the document to be approachable and easy to digest. High value was placed on the fact that lived experience was prioritized as the means to realizing a more equitable grantmaking process. Yet, many participants struggled to translate specific tools and recommendations from the blueprint into specific practices. Comments from multiple participants made clear the role that the structure and context of the implementing organization plays in the successful adoption of the blueprint. Tools that may work well in some contexts do not necessarily translate to others. For example, one respondent noted, equity measures around service delivery do not translate well into measures of equity in advocacy and organizing work. Providing clear tactical examples of how this work is being done successfully across organizational contexts and across issue areas would strengthen the capacity of individuals to implement the blueprint's tools and recommendations.

IMPLEMENTATION CHALLENGES AND OPPORTUNITIES

One of the primary objectives of the evaluation was to identify factors across organizations that presented challenges and opportunities for implementing the principles and tools outlined in the blueprint. Across participants a series of factors stood out as presenting a common set of challenges and/or opportunities for implementation. First and foremost was time. All participants recognized that both engaging with the blueprint and implementing changes to internal practices and policies took time. Several individuals recognized that the culture of philanthropy challenged having the time needed to adequately incorporate community voice. For many, efforts to incorporate lived experience were more time-intensive than conventional funding practices that do not seek community input as means to inform internal decisions.

When timelines are rigid, there is less flexibility to allow for addressing the inherent logistical complexities that emerge when seeking to incorporate lived experience. One participant spoke of this, "Often project timelines don't allocate sufficient time to allow for incorporating lived experience, and even if funders do understand the amount of time that is required, it is not baked into the funding process." For those individuals in our sample who most successfully integrated lived experience into their work, they had the autonomy and opportunity to design their grantmaking process to be driven by the goal of incorporating lived experience, rather than the goal of meeting pre-set deadlines.

Another factor that was lifted up through the evaluation as central to determining the effectiveness of implementing the blueprint was the level of buy-in from organizational leadership. One pilot participant noted that successfully incorporating lived experience requires senior level leadership within organizations to reflect on and adapt their practices. Both senior leaders and the board of directors were named as constituent groups that were pivotal for ensuring the implementation of principles and tools in the blueprint. Comments from program leaders provide more insight into the necessity of leadership buy-in. One participant, a program leader, commented that in the absence of a broader organizational strategy for incorporating lived experience, they faced a limit to which tools could be implemented. Thus what tools are used, and how, is determined primarily by the amount of time that is available for incorporating lived experience as well as the degree to which the organization as a whole has prioritized and adapted internal practices to allow for new procedures to incorporate community voice.

Evidence of challenges and opportunities faced in implementing the principles and recommendations from the blueprint point to two key factors that shape the success of this work. The first factor identified as conditioning the impact of efforts to increase lived experience was time. Multiple participants recognized unless leadership requires and protects time to incorporate community voice, barriers to doing so will persist. In addition to needing the time to be able to adequately capture community voice, participants

noted that leadership buy-in was essential. Adequately incorporating lived experience into the funding process requires evaluating and making adjustments to all aspects of the grantmaking process from staffing to budgets to systems of proposal submission and review. This is not work that can be done by one individual or one department within an organization. It requires openness to change and adoption of new policies and procedures at a broad-scale. This change is most likely when there is a window of opportunity to transform operations across the organization.

EVIDENCE OF IMPACT

The evaluation sought to determine if engagement with the blueprint and/or implementation of the tools affected funders' organizational practices and the incorporation of lived experience . Questions that gathered data on the impact of engagement asked about changes to internal practices and procedures, reflections on their work, tools that were used, and awareness of their own biases. Across organizations, one clear impact of engagement with the blueprint was the realization of a shared language around equity and community engagement. Evidence of impact gathered during the evaluation indicates that engagement with the blueprint also led all individuals to reflect on their own practices and the degree to which they were adequately capturing lived experience. While there was variation across respondents in the degree to which they had implemented changes specified in the blueprint, all individuals said they were planning to make changes to internal practices, and all

participants identified specific tools from the blueprint that they had or were planning to adopt.

An outcome of engagement that was observed across all individuals and organizations who participated in the pilot of the blueprint was the emergence of a common vocabulary. Participants agreed that the document gave them a framework and language to advocate for changing the way the grantmaking process operates both within their own organization and across the philanthropic sector more generally. One respondent commented that the blueprint articulates a new approach to grantmaking that can be easily communicated to garner buy-in across the organization. Having a shared language was recognized as valuable because it provides tangible recommendations for what alternative approaches to incorporate lived experience might look like. Another participant echoed this idea in noting that creating a shared language was the first step in defining more equitable practices. In this way, engagement in the pilot of the blueprint provided participating organizations with the language to both identify and advocate for specific changes to their own grantmaking process. By bringing the language of the blueprint into their organizations, pilot participants were able to impact how the grant process is discussed and understood internally. Engagement with the blueprint allowed participants to create both a shared vision of change and to mobilize others in support of their work.

In addition to creating a shared language, engagement with the blueprint impacted internal practices and procedures within the

pilot organizations. Everyone who participated in the pilot identified at least one tool from the blueprint that they were applying or planned to apply in their work. The majority of participants in the pilot said that they were incorporating multiple tools into their work. The tools respondents identified as implementing in their work included the "Who's at Your Table" tool, the "Roadmap", "designing an equitable review process", and the "Asset Mapping" tool, among others.

When asked to describe how internal practices had changed as a result of engagement with the blueprint, most pilot participants made mention of their strategies for community engagement. All participants stated that they were assessing current strategies for engagement as a result of the blueprint. One participant mentioned evaluating the formalization of their current process. The question was raised as to whether more formal or informal procedures for gathering lived experience produce a representative cross-section of community voices. Another participant noted that their experience using a review process to create a call for grant proposals illuminated the number of tactical challenges and decisions that were required to engage individuals with lived experience in a very "professionalized process". In addition to changing internal review practices to engage lived experience, multiple respondents noted that they were assessing how to incorporate lived experience earlier in the grant process to shape both high-level program strategies and internal operations. For all participants in the pilot, engagement with the blueprint caused them to evaluate and adjust their internal practices in some way.

Finally, engagement in the pilot program caused all participants to reflect on their work and systemic challenges to incorporating lived experience in the funding process. On the one hand, the blueprint expanded the vision of grantmaking for pilot participants. Multiple respondents noted that the blueprint had "generated ideas" and caused them to think "beyond the confines of the conventional grant process". Alternatively, reflections of pilot participants led them to identify limiting aspects of their current operations and the grantmaking process. One individual noted that for lived experience to be incorporated into the grantmaking process it must first be reflected in the operations of foundations, meaning who their staff is and how decisions are made. If an organization is not making efforts to incorporate lived experience when it comes to decisions such as hiring or budgeting, it is unlikely that an organization will be willing or able to make the shifts needed to deeply embed lived experience in their funding process. Another individual's comment speaks to this. They noted that within their organization "red tape makes it hard to adopt and implement inclusive practices". For example, policies around what information can be shared about funding priorities shape what information can be shared with community members with implications for levels of transparency and inclusivity in procedures to engage lived experience. Taken together these comments point to a recognition across pilot participants that integrating lived experience requires major organizational shifts in internal cultures, policies, and procedures.

Generally, individuals' experiences of participating in the pilot of the blueprint

do provide evidence that engagement with Centering Community Voice: A Blueprint for Incorporating Lived Experience into the Grantmaking Process has an impact on the incorporation of lived experience. While the timeline of the pilot project did not allow for gathering evidence on the long-term outcomes that are theorized to result from adoption of tools and principles in the blueprint, evidence does indicate that engagement produced short term impacts in regards to how participants understand lived experience, how they engage community members in their work, and reflections on opportunities and constraints in adapting current practices to become more inclusive and equitable.

CONCLUSIONS AND RECOMMENDATIONS

The goal of the creation of Centering Community Voice: A Blueprint for Incorporating Lived Experience into the Grantmaking Process was to reduce structural inequities resulting from power imbalances in the grantmaking process. The adoption of principles, tools, recommendations, and action steps outlined in the blueprint are theorized to shift power dynamics by increasing the influence of individuals in underserved communities on decision making throughout the funding cycle. To assess the effectiveness of the document, the pilot project served to provide evidence of the usability and impacts of the blueprint across three funding organizations working in southeastern Michigan. Data gathered informs conclusions about the effectiveness of the document in helping funders better incorporate the voice of the community throughout their grantmaking and decision making processes.

The findings in this report provide support for the theory of change that underlies the principles and tools in the blueprint. Evidence presented here indicates that experience doing equity work, organizational capacity, a willingness to incorporate lived experience, and a window of opportunity are all preconditions for successful incorporation of lived experience. Additionally, the experiences of pilot participants provide data to refine theoretical understandings of the relationship between organizational willingness and capacity and successful incorporation of lived experience. Findings from the evaluation point to leadership buy-in as a component of willingness that significantly impacted the successful incorporation of lived experience for all organizations who participated in the pilot. Multiple participants noted that the degree to which lived experiences were incorporated into the funding cycle depended on the degree to which senior leaders and board members understood and valued the contribution of lived experience to realizing the goals of equity and inclusivity. The evaluation also indicated that time was one of the most critical aspects of organizational capacity shaping outcomes of the efforts of pilot participants. All pilot participants recognized that procedures for incorporating community voices require time for reflection and adjustment to ensure that the voices of underrepresented community members influence decisions throughout the funding process. Where time is limited, efforts to incorporate lived experience are constrained.

In addition to validating the theory of change, the evaluation of the pilot of the blueprint surfaced specific learnings in regards to the

impacts of utilizing this document to design internal practices. The first learning is that successfully incorporating lived experience requires that organizations be adaptable. Experiences of pilot participants indicate that the work of increasing lived experience is unpredictable, requires significant amounts of time, and must build opportunities for reflection and adjustment into the funding process. Organizations that are adaptable and not beholden to strict timelines are most likely to incorporate the full range of voices needed to represent the interests of affected communities.

Evidence gathered during the pilot project indicates clear impacts can be expected to come from an organization's implementation of the tools and principles outlined in the blueprint. Across pilot participants, outcomes observed included reflection on internal policies and procedures, shifts in tactics for engaging community members, and expanded support for efforts to increase lived experience. Piloting the blueprint expanded the vision of grantmaking for participants and allowed individuals to identify aspects of policies and procedures that limited the incorporation of community voice. All organizations who participated in the pilot planned to implement new tactics for community engagement based on the tools that were provided. Finally evidence gathered indicates engaging in the pilot project led to changes in internal practices as a result of having a common language to both identify and advocate for specific shifts in internal practices.

Despite what was learned through the pilot of the blueprint, the following questions were raised as a result of the evaluation. Firstly, while evidence indicates support for the relationship between preconditions of success and the incorporation of lived experience, it is unclear whether one's experience with lived experience and equity work are the primary determinants of whether implementation of principles and tools in the blueprint produce more equitable and inclusive funding practices. All individuals in our sample had significant experience doing equity work, as well as well developed understandings of lived experience. Given this uniformity of the sample, it can not be determined if implementation would be successful when practitioners have less experience centering equity and community voice in their grantmaking process. Secondly, while all pilot participants recognized the importance of leadership buy-in (from both governing boards and executives), it is unclear from the evaluation what level of buy-in is necessary to ensure that internal efforts to incorporate community voice result in more inclusive and equitable funding practices. Unanswered questions on the role of leadership include: What role does leadership specifically play in the successful incorporation of lived experience? What level of leadership buy-in is necessary?

Despite these questions, evaluation findings indicate for the incorporation of community voice to result in more equitable and inclusive practices, organizations must have ample time to do this work and there must be broad

willingness among all staff to interrogate all internal practices and procedures that directly and indirecting shape funding decisions. Organizations most likely to succeed at creating inclusive and equitable grantmaking processes are those that have the time and willingness to engage in continuous learning as it relates to incorporating lived experience. Questions will arise and there will be uncertainty around how to implement the tools and principles in the blueprint. Successful implementation will be more likely when organizations recognize there is no single 'right' way to do this and that what experience matters will always depend on the problem being addressed and the context of experience for the individuals being served.

APPENDIX A: BASELINE SURVEY

BASELINE SURVEY

1. In the context of your work, what does "lived experience" mean to you?

   _____

   _____

   _____

2. To what extent do you agree with the following statement: we currently incorporate lived experience into our work.

   ◯   Strongly agree (1)

   ◯   Somewhat agree (2)

   ◯   Neither agree nor disagree (3)

   ◯   Somewhat disagree (4)

   ◯   Strongly disagree (5)

3. Please explain your response to the previous question. Where relevant, provide specific details to illuminate how your organization incorporates lived experience.

   _____

   _____

   _____

4. To what extent do you agree with the following statement: our organization has experience doing equity work.

   ◯   Strongly agree (1)

   ◯   Somewhat agree (2)

   ◯   Neither agree nor disagree (3)

   ◯   Somewhat disagree (4)

   ◯   Strongly disagree (5)

5. Please explain your response to the previous question. Where relevant, provide specific details to illuminate your organization's experience (or lack thereof) doing equity centered work.

   _____

   _____

   _____

6. To what extent do you agree with the following statement: our organization has the capacity to implement new practices that incorporate lived experience.

    ○ Strongly agree (1)
    ○ Somewhat agree (2)
    ○ Neither agree nor disagree (3)
    ○ Somewhat disagree (4)
    ○ Strongly disagree (5)

7. Please explain your response to the previous question. In what ways do you have or not have capacity to implement new practices that incorporate lived experience?

    _____

    _____

    _____

8. To what extent do you agree with the following statement: there is a willingness in our organization to incorporate more lived experience into our work.

    ○ Strongly agree (1)
    ○ Somewhat agree (2)
    ○ Neither agree nor disagree (3)
    ○ Somewhat disagree (4)
    ○ Strongly disagree (5)

9. Please explain your response to the previous question. Where relevant, provide specific details to illuminate the level of willingness in your organization to incorporate more lived experience.

    _____

    _____

    _____

10. To what extent do you agree with the following statement: there is an opportunity within our organization to create and implement new practices to incorporate more lived experience into our work.

    ○ Strongly agree (1)
    ○ Somewhat agree (2)
    ○ Neither agree nor disagree (3)
    ○ Somewhat disagree (4)
    ○ Strongly disagree (5)

APPENDIX A: BASELINE SURVEY

11. Please explain your response to the previous question. Where relevant, provide specific details to illuminate the opportunities (or lack thereof) to incorporate more lived experience into your work.

_____

_____

_____

12. To what extent do you agree with the following statement: our organization currently solicits and acts on feedback from the communities we serve.

    ○ Strongly agree (1)
    ○ Somewhat agree (2)
    ○ Neither agree nor disagree (3)
    ○ Somewhat disagree (4)
    ○ Strongly disagree (5)

13. Please explain your response to the previous question. Where relevant, provide specific details to illuminate how your organization does (or does not) solicit feedback from the communities you serve.

_____

_____

_____

14. To what extent do you agree with the following statement: our organization is open, transparent and responsive when engaging people with lived experience.

    ○ Strongly agree (1)
    ○ Somewhat agree (2)
    ○ Neither agree nor disagree (3)
    ○ Somewhat disagree (4)
    ○ Strongly disagree (5)

15. Please explain your response to the previous question. Where relevant, provide specific details to illuminate how your organization is (or is not) transparent and responsive.

_____

_____

_____

16. To what extent do you agree with the following statement: our organization listens with attention and addresses concerns in ways that are relevant to the community.

     ○   Strongly agree (1)
     ○   Somewhat agree (2)
     ○   Neither agree nor disagree (3)
     ○   Somewhat disagree (4)
     ○   Strongly disagree (5)

17. Please explain your response to the previous question. Where relevant, provide specific details to illuminate how your organization does (or does not) listen with attention and address the concerns of the communities you serve.

_____

_____

_____

18. To what extent do you agree with the following statement: our organization has assessed where we are on our journey to incorporating lived experience.

     ○   Strongly agree (1)
     ○   Somewhat agree (2)
     ○   Neither agree nor disagree (3)
     ○   Somewhat disagree (4)
     ○   Strongly disagree (5)

19. Please explain your response to the previous question. Where relevant, provide specific details to illuminate how your organization has (or has not) conducted a self assessment of your incorporation of lived experience.

_____

_____

_____

20. To what extent do you agree with the following statement: our organization has an action plan in place to incorporate lived experience into our work.

     ○   Strongly agree (1)
     ○   Somewhat agree (2)
     ○   Neither agree nor disagree (3)
     ○   Somewhat disagree (4)
     ○   Strongly disagree (5)

21. Please explain your response to the previous question. Where relevant, provide specific details to illuminate how your organization does (or does not) have an action plan in place to incorporate lived experience.

_____

_____

_____

22. If you are currently implementing practices to incorporate lived experience, what practices are you implementing?

_____

_____

_____

23. To what extent do you agree with the following statement: our organizational practices are inclusive.

    ◯ Strongly agree (1)

    ◯ Somewhat agree (2)

    ◯ Neither agree nor disagree (3)

    ◯ Somewhat disagree (4)

    ◯ Strongly disagree (5)

24. Please explain your response to the previous question. Where relevant, provide specific details to illuminate the degree to which organizational practices are (or are not) inclusive.

_____

_____

_____

25. To what extent do you agree with the following statement: our organizational practices are equitable.

    ◯ Strongly agree (1)

    ◯ Somewhat agree (2)

    ◯ Neither agree nor disagree (3)

    ◯ Somewhat disagree (4)

    ◯ Strongly disagree (5)

26. Please explain your response to the previous question. Where relevant, provide specific details to illuminate the degree to which organizational practices are (or are not) equitable.

_____

_____

_____

27. How does your organization define equity?

_____

_____

_____

28. What indicators (if any) does your organization employ to assess equity?

_____

_____

_____

29. Does your organization have a statement on your commitment to diversity, equity, inclusion and/or justice?

○ Yes (18)

○ No (19)

○ Other (20) _____

30. Have you participated in any formal or informal training focused on diversity, equity, and/or justice? If so, please describe.

_____

_____

_____

31. Has your organization offered you opportunities to participate in formal and/or informal trainings focused on diversity, equity, and/or justice? If so, please describe.

_____

_____

_____

APPENDIX A: BASELINE SURVEY

32. Your name:

_____

33. Your organization:

_____

34. What is the geographic focus of your organization?

- ◯ Neighborhood (1)
- ◯ City (2)
- ◯ County (3)
- ◯ State (4)
- ◯ Regional (multiple states) (5)
- ◯ National (6)
- ◯ International (7)

35. Your role at your organization:

_____

36. How long have you been working at this organization?

_____

37. How long have you been in your current role at this organization?

_____

38. I identify my race/ethnicity as:

- ◯ White (1)
- ◯ Black or African American (2)
- ◯ American Indian or Alaska Native (3)
- ◯ Asian (4)
- ◯ Native Hawaiian or Pacific Islander (5)
- ◯ Other (6)

39. I identify my gender as:

- ◯ Male (1)
- ◯ Female (2)
- ◯ Non-binary / third gender (3)
- ◯ Prefer not to say (4)

APPENDIX B: INTERVIEW SCRIPT

INTERVIEW SCRIPT

Feedback on the Blueprint:

- What motivated you to engage in this project? Why have you chosen to engage with the Blueprint?

- What have you found to be most useful about this document?

- What Pieces of the recommendations would you like to see incorporated into your work?

- How approachable is the information included in the document?
    - *Is it easy to understand?*
    - *Were you able to identify clear applications to your work?*
    - *What learnings were you able to pull out of the Blueprint?*

- How could the Blueprint be improved? Is there anything you were hoping to see that was not included?

Causal Factors:

Are there any changes to any internal practices and procedures that you are exploring as a result of your engagement with the blueprint?

- Solicit and act on feedback
    - *Transparency*
    - *Organizational Assessment*
    - *Inclusiveness of practices*
    - *Recognition of bias*
    - *Tools being used*

The implementation process:

- Have you conducted an assessment of your organization? If not, why not? If so, what have you learned?

- Any changes to understandings and definitions of lived experience as a result of your engagement with the Blueprint? Has this document caused you to think differently about how you understand and identify lived experience in your work?

- What factors need to be in place within your organization to be able to utilize the Blueprint? (e.g. support from leadership, staff capacity, etc.)

APPENDIX B: INTERVIEW SCRIPT

- Has the blueprint caused you to reflect on the inclusivity of your organizational practices? If so, explain. If not, why not?

- Has the blueprint caused you to reflect on the equity of your organizational practices? If so, explain. If not, why not?

- Through engagement with the Blueprint have you recognized biases in your work that you were previously unaware of?

- What tool(s) in the blueprint do you plan to use in your work and why?

- What do interactions with someone with lived experience look like in your organization?
    - *Who do you identify as having lived experience?*
    - *How and how often are they engaged?*
    - *Why do you define those that you do as having lived experience?*
    - *How did you identify these individuals?*

- What is the lived experience you are incorporating? Can you give an example of what is being voiced?

- What challenges and opportunities have you identified in implementing the tool(s) from the Blueprint?

- How are you measuring the outcomes of incorporating lived experience? If so, what indicators are you using? If not, why not?

APPENDIX C: FINAL SURVEY

1. Who do you think would benefit from engaging with the blueprint?

   _____

2. Who should be the target audience for the blueprint?

   _____

3. Would you be interested in attending a webinar for the official rollout of the blueprint?

   ○ No (1)
   ○ Maybe (2)
   ○ Yes (3)

4. Would you be willing to provide the names and contact information for individuals we should share the final version of the blueprint with?

   ○ No (1)
   ○ Maybe (2)
   ○ Yes (3)

5. If you responded yes to the previous question, please provide the names and contact information for individuals with whom we should share the final version of the blueprint and/or invite to an informational webinar on the blueprint

   _____

   _____

   _____

6. Do you have any suggestions for strategies to disseminate the tools/recommendations of the blueprint?

   _____

   _____

   _____

7. Are there supplemental materials you would suggest making available in addition to the blueprint to encourage implementation?

   _____

   _____

   _____

8. Would you be willing to share your experience of engaging in the blueprint with others?

    ○ No (1)
    ○ Maybe (2)
    ○ Yes (3)

9. If you answered yes to the previous question, would you be willing to share a quote to be used for promotion of the blueprint?

    ○ No (1)
    ○ Maybe (2)
    ○ Yes (3)

10. Do you see this blueprint being used within your organization following this evaluation?

    ○ No (1)
    ○ Maybe (2)
    ○ Yes (3)

11. Please explain your response to the previous question.

_____

_____

_____

12. Has your organization committed to using the blueprint? If so, how?

_____

_____

_____

13. Your name:

_____

14. Your organization:

_____