



CASE STUDY | PARTICIPATORY GRANTMAKING IN THE PEEL REGION

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What would happen if residents in a community were able to decide what organizations and services were funded in their area? What would happen if funding priorities were defined by community residents instead of philanthropic foundations? How might this change and empower a community?

These questions are what the participatory grantmaking pilot, a partnership between the WES Mariam Assefa Fund and the Tamarack Institute, wanted to answer. This case study presents key lessons learned from the Tamarack team's perspective during the first half of this two-year project, which launched in 2021.

OVERVIEW

In July 2021, the [WES Mariam Assefa Fund](#) partnered with the [Tamarack Institute](#) to launch a participatory grantmaking project. Ontario, Canada's, Peel Region was selected as the inaugural community for the project, which will run from 2021 to 2023. [Learn more about the community selection process here.](#)

In the first stage of this pilot project, Tamarack's role focused on engaging Peel residents to form a People's Panel made up of community members. The People's Panel applied their lived experiences and their knowledge of the newcomer settlement sector to identify key issues related to the economic mobility of immigrants and refugees in their community.

Tamarack worked with the People's Panel and supported them as they:

- co-designed a funding opportunity;
- defined key funding priorities; and
- made funding decisions to support the development of equitable economies for immigrants and refugees within the Peel region.

Tamarack's efforts at this stage were also supported by the [Peel Newcomer Strategy Group](#) (PNSG). PNSG offered this project valuable knowledge of the local landscape and provided important

Project Partners

The Partners of the Participatory Grantmaking Pilot work [to build equitable economies for immigrants and refugees in Peel](#):

- [WES Mariam Assefa Fund](#)
- [The Tamarack Institute](#)
- [The Peel Newcomer Strategy Group \(PNSG\)](#)
- [The People's Panel](#)

connections to the wider Peel network.

WHAT IS PARTICIPATORY GRANTMAKING?

Participatory grantmaking is a model of funding that cedes decision-making power about funding from foundation staff to the very communities that funders aim to serve. This participatory process privileges and is grounded in the lived and living experiences of the community. Such a process pulls from the community's collective wisdom to name the community's needs and appropriate solutions. At its core, it is a process that values and recognizes community members as subject matter experts who can use their collective knowledge and wisdom towards developing effective and responsive funding decisions.

The Model

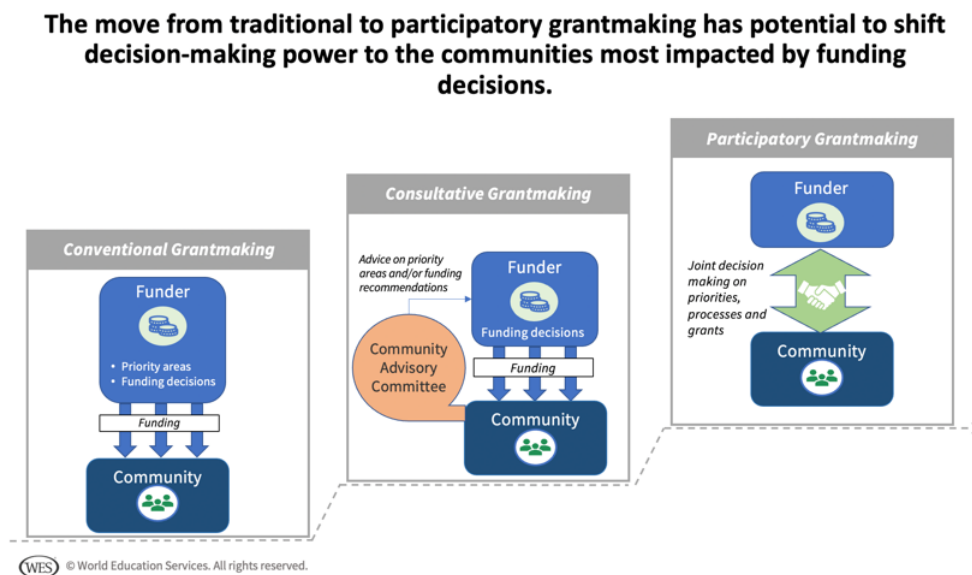


Figure 1: The Participatory Grantmaking Model

The Peel Context

The Peel Region is the only immigrant majority region within the Greater Toronto Area (GTA). In Peel, immigrants account for **51.5%** of the **1.37 million** residents. Among them, **94,105** are newcomers who arrived in Canada during the 2016 Census period, which represents **6.4%** of the annual national admissions. Furthermore, Peel is incredibly diverse, with the highest percentage (**62.3%**) of visible minorities in the GTA. Source: [PNSG 2019 Report on Peel Newcomers](#)

THE THREE STAGES

This participatory grantmaking project can be conceptualized as having three stages of work in its first year:

Stage 1: Co-Design

At this stage, Tamarack invited Peel residents to form a People’s Panel. The People’s Panel (comprising 12 engaged Peel residents) served as both content and context experts who had a strong understanding of the Peel landscape and applied their lived experience to ground this grantmaking project. They represented a diversity of experiences in the Peel community in terms of geography, ethnicity and cultural background, gender and identity, age, lived experience as immigrants or refugees and knowledge of the immigrant-serving and employment sectors.

The Panel’s Process

The Tamarack team led the Panel through a thorough and thoughtful co-design process over five virtual sessions of two hours each. Each session worked towards defining the funding opportunity.

The People’s Panel first reflected deeply on how to design the opportunity in a way that would be grounded within the needs and aspirations of the Peel community while achieving the greatest impact. They then agreed on key funding priorities to match these needs and aspirations and defined the

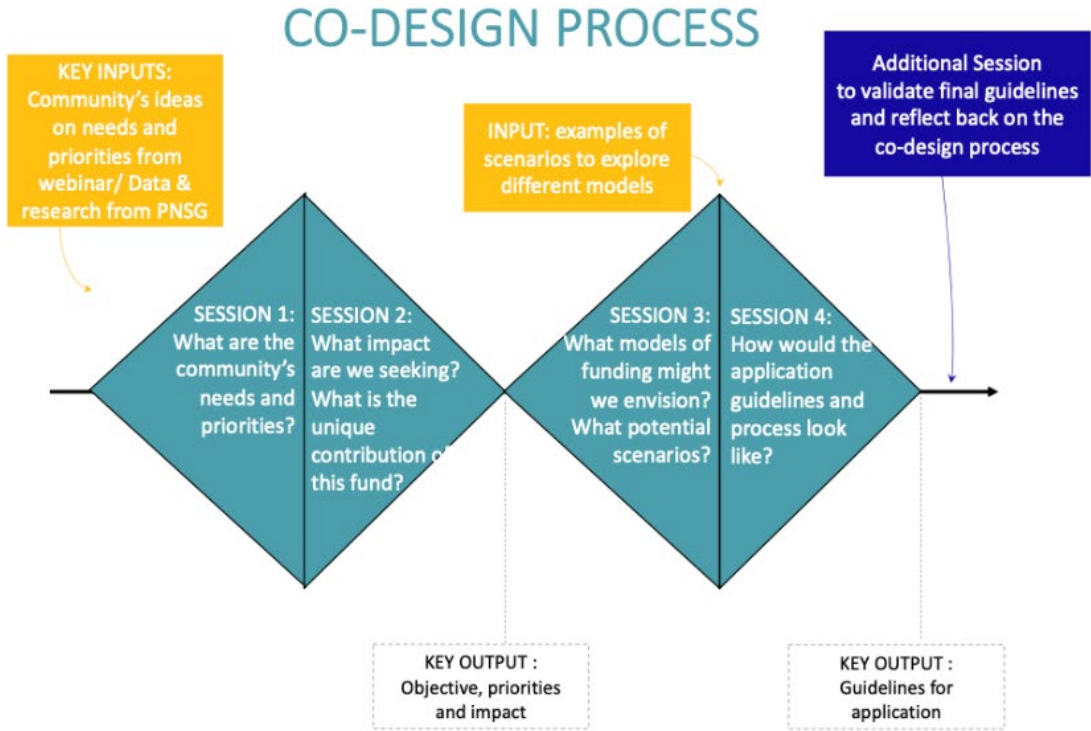


Figure 2: The Co-Design Process

parameters of a call for proposals. See Figure 2 for an overview of the co-design process, as well as key questions and outputs for each session.

Tools Used

The Tamarack team utilized several facilitation tools to help the Panel to find convergence and consensus within their dialogue. For example, the [Rose-Bud-Thorn framework](#) was used to build the Panel's capacity to provide thoughtful feedback. This framework helped to gather input from the Panel and provided an effective structure that allowed feedback conversations to stay on topic. Putting effort towards fostering an environment that encouraged constructive feedback allowed the group to navigate their diverse perspectives and find consensus.

Another tool used was the [Impact-Feasibility Matrix](#), which helped the group to select key priorities. Using this tool, the Panel was able to reflect on what kind of impact was feasible within the parameters of this pilot project. This tool also allowed the Panel to share their hopes and aspirations for this project and work towards co-creating a shared vision of what this project's impact would be. This dialogue allowed the Panel to develop a final set of priorities, which allowed this funding opportunity to take shape.

Overall, the output of this facilitation effort was the development of a funding opportunity that emphasized employment-focused efforts serving marginalized immigrant and refugee populations within the Peel Region. [Learn more about the funding priorities and guidelines here.](#)

Stage 2: Outreach

At this stage, the funding opportunity was shared widely with the broader Peel community. Upon seeing the recommendation from the People's Panel, Tamarack supplemented this outreach by conducting Coaching Calls for interested community organizations and residents who were looking for support in the application process. These Coaching Calls aimed to ensure the accessibility of the funding opportunity, and to support the capacity building of potential applicants.

The Tamarack team was also able to provide background information on the participatory process that led to the development of this funding opportunity. This gave interested applicants a better understanding of the funding opportunity and the key participatory mechanisms that would facilitate final funding decisions.

Stage 3: Grantmaking

Upon receiving 20 strong applications from interested community organizations, Tamarack supported the People's Panel in their decision-making efforts towards determining how to disburse \$600,000 in grants.

At this stage, the People's Panel spent a considerable amount of time in preparation work, reviewing and assessing applications. The criteria and priorities that the Panel had defined in the co-design stage

were used to develop an assessment matrix. Tamarack ensured their due diligence by reviewing additional documents, such as activity and financial reports.

A consensus was progressively built by the People’s Panel over two two-hour sessions through ongoing reflection and adjustment within a group dialogue. For nearly all participants, this was the first time they were involved in a grantmaking process.

The decision and grantmaking processes are summarized below:

The Grantmaking Process

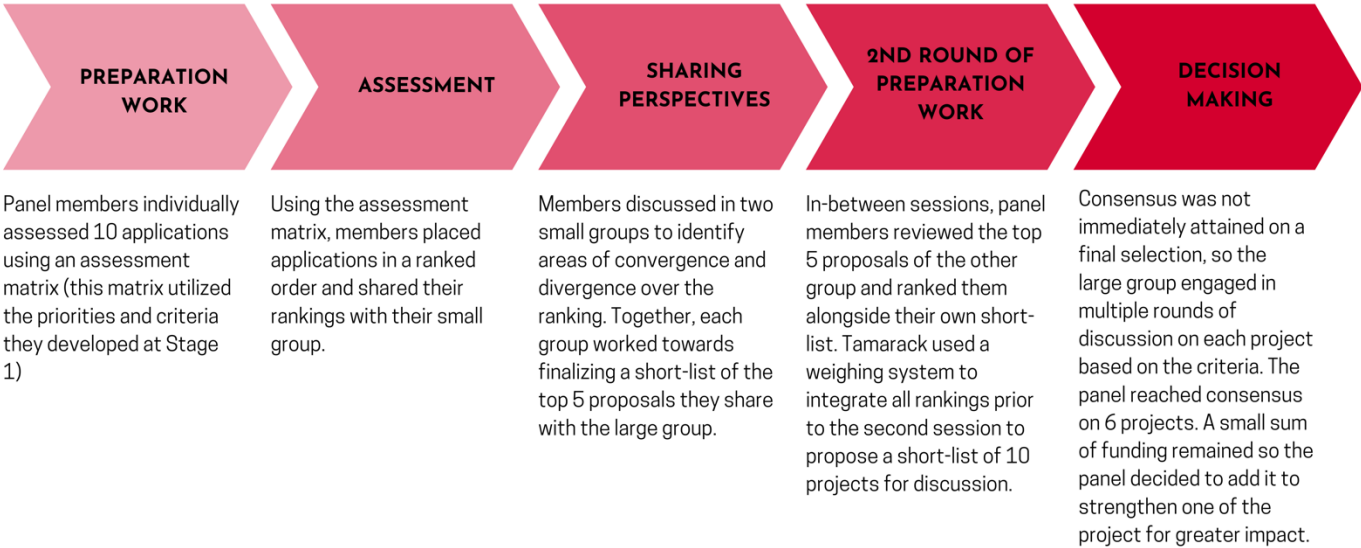


Figure 3: The Grantmaking Process

LESSONS LEARNED

Importance of Ongoing Outreach and Feedback: Throughout this project, ongoing attempts were made to engage the community (through information sessions and the People’s Panel), and this allowed the project design and development to be responsive to the local context.

Tamarack was intentional about making space for the community to provide their input. The goal was to incorporate and make visible how their efforts were shaping the trajectory of this project.

Building Local Relationships: Tamarack’s relationship with the PNSG was also critical to the success of this pilot. By having a relationship with a local community actor, Tamarack was able to connect with the wider Peel network. The PNSG offered valuable knowledge of the local landscape, and this grounded the work. Additionally, their connections to the community (via networks and community tables) connected the project to other key participants who engaged in it as either People’s Panel

members or funding recipients.

Processing and Making Input Visible: This project emphasized the importance of having a well-planned yet adaptable facilitation process, including work that occurred in-between sessions. To support the People's Panel and the strides they made in their shared dialogue, it was helpful after each session to synthesize their key points and takeaways. The following sessions would begin with a share-back where a synthesis was presented to the People's Panel to ensure that it reflected their ideas.

This process was valuable because it allowed the People's Panel to see how their contributions were being utilized to shape the project. Furthermore, this practice allowed each session to be grounded in a common understanding and to maintain engagement efficiently and effectively.

Navigating Divergence: Initially, there was a relatively high degree of divergence within the Panel during the grantmaking decision process. Every member applied their unique lens when assessing the applications. This divergence could have stalled the dialogue and presented itself as a potential roadblock within the process. What helped, however, was the Panel being able to collectively reflect on their work from the design process.

Involving Panel members in the design was key to building consensus, as they were able to ground their decision-making efforts in their shared understanding of the assessment criteria and funding objectives. It was useful to give the Panel members ample time to move through their divergence.

Fostering Trust: The trust that Panel members had for each other and the participatory process played a significant role as it gave the group confidence in their ability to navigate their divergence. This emphasized the importance of Tamarack's facilitation work within the co-design process to foster trust, connectivity and synergy, allowing the group to work towards consensus-building.

THE ROLE OF THE PEOPLE'S PANEL

Feedback from Community Participants

After each session, Panel members were encouraged to express areas of concern or improvement. They were invited to fill in a [Monitoring Collaboration tool](#) (disseminated via [Mentimeter](#)), which asked them to answer five key questions:

- What did you appreciate overall about the last session?
- How would you rate your contribution to the session?
- How much did you learn from the session?
- To what extent did you feel equipped to take part in the session (e.g., information shared before session, support with tools, Q&A)?
- How would you rate the level of trust, listening and collaboration within the group?

Each session started with a group share-back of the feedback from the previous session. This ongoing collection of feedback allowed for responsive facilitation that could be adjusted when necessary. Furthermore, an extra session was added to the initial planning to give the People’s Panel the space to reflect on the overall process and their shared learnings.

Overall, what this effort encapsulates is the culture of feedback that was embedded within the participatory process. This project’s momentum was grounded within the Panel’s diverse perspectives.

These are the elements the People’s Panel deeply valued about the participatory grantmaking process:

On Inclusivity:
“This is the first time being invited to help develop grant and funding applications. I appreciated the inclusivity of it.”

On Diversity of Voices:
“Different backgrounds and experiences were reflected.”
“Everyone respected the diversity the group represented”

On Engagement:
“The first few sessions, we focused on sharing our thoughts (we were observing), but over time it became dialogue (more reciprocal). Because people were in conversation with each other, they were listening actively. We were engaging deeply and listening keenly.”
“We went from a collaborative group to a participatory group.”

On Shared Understanding and Learnings:
“I appreciated the deep understanding we developed about the many dynamics involved in fundraising. We dug deep and got into the roots of the process.”
“I learned so much from this process and appreciated the teamwork. The diversity of the panel was a great opportunity to learn from others. [...] That made the process more fulfilling.”

Figure 4: Quotes from the People’s Panel

CONCLUSION

This participatory grantmaking pilot offers a glimpse at what the future of philanthropy could look like. Specifically, the project demonstrated for all stakeholders involved the inherent value that accompanies meaningful partnership with community. Moreover, the insight and perspective the People’s Panel brought to this project was incredibly valuable as it allowed this funding effort to be responsive and grounded in lived experiences. This was most notably demonstrated within the ongoing effort to

recognize the diversity in newcomer experiences, paying close attention to marginalized communities typically left out of newcomer programming.

The People's Panel reflected on their shared Peel context and their understanding of the newcomer settlement sector to develop key priorities and guidelines for this funding opportunity. Their effort was grounded in their commitment towards building equitable economies in the Peel region for immigrants and refugees.

Above all, the success of this project as of August 2022 came from the efforts that were taken to shift decision-making power from funders to the community. This opportunity gave the Peel community the space to make decisions and enact meaningful change that reflected the needs and aspirations of their growing immigrant and refugee populations.

Interested in learning more?

Visit the Tamarack Institute website for more information about the participatory grantmaking pilot project:

<https://www.tamarackcommunity.ca/participatory-grantmaking>