

***Making the Case***

Staff is able to communicate a compelling vision with an eye toward educating decision makers of the importance of funding groups led by and serving communities marginalized and disadvantaged based on race, class, gender, sexuality, abilities, immigration status, etc.			
Grant recommendations are presented in a manner that builds decision makers' understanding of grantee organizations as change agents, experts, and leaders.			
Recommended grants align with an equity strategy.			
Grassroots organizing groups led by women of color are intentionally recommended for funding.			

***Award and Implementation***

Learning goals, program measures, and capacity building objectives are co-created with grantees rather than imposed on them.			
Reporting requirements are appropriate to the size and length of the grant.			
Program staff proactively provides grantees with technical assistance, capacity building, and/or connections to other funders.			

***Evaluation and Learning***

Evaluation and learning activities are designed primarily for learning and adaptation, by both funder and grantees.			
Evaluation and learning activities are designed to repurpose data and learnings that grantees already collect and share.			
Information collected through the evaluation process is shared publicly with the intention of sharing information, work, progress in marginalized communities.			

***Internal Capacity***

Our staff and board have undergone training on diversity, equity and inclusion.			
Our staff and board have a shared understanding of how cultural norms, myths or popular ideas contribute to perpetuating inequity.			
Our organization had developed operational processes and screens to address racial and gender justice, such as policies on vendors.			
<b>TOTAL</b>			

*This worksheet is adapted content from Justice Funders'*

***"Harmony Initiative" and the Choir Book: A Framework for Social Justice Philanthropy.***

For more information, please see [www.justicefunders.org/Harmony-Initiative](http://www.justicefunders.org/Harmony-Initiative) and [www.justicefunders.org/Choir-Book](http://www.justicefunders.org/Choir-Book)



<b>DIRECTIONS – For each statement, choose one of the following:</b> <ul style="list-style-type: none"> <li>• Red Light: Our organization has not gone there</li> <li>• Yellow Light: Our organization has started conversations or taken some first steps</li> <li>• Green Light: Our organization is fully on board</li> </ul>	RED LIGHT	YELLOW LIGHT	GREEN LIGHT
<b><i>Strategy Development</i></b>			
We seek and substantively integrate priorities and strategies from affected indigenous communities in our strategy development process.			
Our grantmaking strategy recognizes structural racism, gender disparities, and social determinants impacting the problems we seek to address.			
Our grantmaking strategy prioritizes support for the most marginalized in the communities we fund.			
Our grantmaking strategy includes support for grassroots organizing.			
We understand that in order to support durable organizations that can take risks, we must provide multi-year, general operating support.			
<b><i>Outreach and Application</i></b>			
We proactively lessen the burden on applicants in the application process by: accepting proposals prepared for other foundations; using a common grant application format; collecting publicly available financial information; etc.			
In the application process, we seek input from under-resourced groups to identify their barriers and technical needs.			
We intentionally reach out to communities and organizations that have not been on our foundation's "radar screen" and/or are traditionally excluded.			
We "right size" application requirements to the size and length of the grant.			
<b><i>Due Diligence</i></b>			
Program staff understands how implicit bias may influence how they assess applicants, and seeks methods to mitigate its impact.			
Applications are assessed through gender and racial justice screens, including assessing authentic leadership by women and people of color.			
Applications are not declined solely because of an applicant organization's capacity to submit a polished proposal.			
Technical assistance and/or follow up is provided for applicants with promising proposals that lack polish or demonstrate lower financial or organizational capacity.			

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