

# Participatory Strategy Development

Since its inception, Amplify Fund prioritized local leadership decision-making as evidenced in our values. In contrast to other funders who use participatory grantmaking (which gives leaders decision making power over individual grants but often still relies on strategies developed by foundation staff), we used a process where local community leaders created our eight place-based grantmaking strategies. We understood that each place was unique, and the specifics of power building, racial justice, and equitable development had to be understood in the local context. In order to achieve that, we ceded power and lifted up local wisdom. This chapter provides insights on how we got here and what we have learned.

In 2018, after Amplify's initial funders created a working theory of change and selected the places Amplify would work, we sought to understand the local context of each place through a process similar to snowball sampling. Relying on existing relationships, we asked for recommendations on who else to talk to until we landed on a core group.

This time-intensive, relational work was critical for:

- Identifying Local Strategy Advisors that aligned with our theory of change, were diverse, and were experts in particular issue areas.
- Identifying specific geographies within states, unique features, prominent issues, and needed capacities to build power in each place.
- Creating local ownership of the grantmaking strategy.

## Amplify worked with 31 local strategy advisors

Plus, the local strategy for California was developed through a similar process led by the Fund for an Inclusive California, Amplify's sibling fund and grantee.



## SIX-STEP PARTICIPATORY PROCESS

- 1.** Staff traveled (a lot!) to meet with local leaders to listen and learn about the local context.
- 2.** Staff invited Local Strategy Advisors for each place. Amplify made a \$25,000 grant to each advisor for their time and expertise.
- 3.** Staff met with each advisor 1:1 to talk through Amplify's Theory of Change and learn about local opportunities, needs, and priorities.
- 4.** Advisors convened in each place for a facilitated day-long session to come to consensus about the local grantmaking strategy.
- 5.** Then, advisors co-wrote the local strategy paper with support from Amplify staff.
- 6.** Advisors & staff then presented the completed local strategy for steering committee approval (via modified consensus). Soon after approval, staff started making grants based on the guidelines created in each local strategy process.



# LESSONS LEARNED

## **CLARIFY CRITERIA FOR LOCAL STRATEGY ADVISOR SELECTION.**

Given Amplify Fund's commitment to transparency and improving philanthropic practices, we could have been more explicit and public about our Local Strategy Advisor selection process. While we provided a broad description of the advisors (to respect confidentiality), we could have also provided a list of selection criteria in alignment with our transparency value.

## **GIVE LOCAL STRATEGY ADVISORS SOMETHING TO RESPOND TO.**

The working theory of change document created at the beginning of the fund set important parameters for selecting Local Strategy Advisors and for creating the local strategy documents. The emphasis on racial justice, power building, and equitable development was broad enough for Local Strategy Advisors to select a variety of issues (e.g., housing, land justice, the environment) and capacities (e.g., communications, leadership development, organizing), while also limiting a completely “blue sky” approach to local strategies.

## **PROVIDE SPACE FOR INDIVIDUAL AND GROUP IDEATING.**

The opportunity for Local Strategy Advisors to come together in-person, learn from one another, and collectively create a strategy document led to a level of local ownership rarely seen in philanthropy. It also produced new and different relationships that bled into other spaces. However, we believe this was made possible by first building trust in 1:1, in-depth conversations with Local Strategy Advisors, and with expert facilitation during in-person group meetings. The decision about who should conduct 1:1 meetings and who should facilitate the in-person group meeting should take into account who will hold future relationships with Local Strategy Advisors.

## **CONSIDER THE ROLE LOCAL STRATEGY ADVISORS PLAY FOR THE DURATION OF THE FUND.**

We did not contemplate what role Local Strategy Advisors would have after the grantmaking strategies were launched. We believe this was a misstep as Local Strategy Advisors could have provided additional input on areas unspecified in the local strategy, supported ongoing evaluation activities, and ultimately, ensured more rigor in strategy updates along the way.

# LESSONS LEARNED

## **INTEGRATE ALL GOALS, ACTIVITIES, AND EVALUATION INTO THE LOCAL STRATEGY.**

Amplify Fund was always a two-goal fund: 1) nurture and strengthen the conditions necessary for Black and indigenous people, and people of color communities to build power, and 2) organize funders so they shift what and how they fund. Unfortunately, while we collected information about the funder landscape during initial conversations, we did not end up writing a funder organizing strategy in each of our places or, subsequently, funder organizing activities. We also missed the opportunity to include capacity building activities that aligned with the capacity goals identified within each strategy, and the opportunity to write the strategy as a set of outcomes we could later evaluate. This meant some of our activities were disconnected from the local strategies.

## **INVITE FUNDERS TO WITNESS THE PROCESS.**

National funders took part in strategy conversations in only two places, and the result of that participation was a deeper understanding of place, and a greater investment/buy-in into the locally developed strategy. Unfortunately, because of scheduling and logistical constraints, funders did not participate in any other place's local strategy process (unless they were invited to participate as Local Strategy Advisors). Given our goal around funder organizing, we wish we had invested more energy into including funders in this process, while still maintaining clarity of roles (i.e. that community leaders are the ones creating the strategy).

## **DO NOT ASSIGN WRITING RESPONSIBILITIES TO MOVEMENT LEADERS.**

Our staff carried the burden of drafting the initial strategy document for LSAs to respond to. This made it easier for movement leaders to agree to becoming Local Strategy Advisors. Writing is a time-consuming process, made even more difficult if attempting to collectively write. Having a staff person or consultant write a first draft is far more efficient and allows for a singular voice throughout strategy documents.

## **THE TIMELINE FOR DEVELOPING A STRATEGY SHOULD BE RESPONSIVE TO LOCAL NEEDS.**

Building relationships takes time, and unforeseen events can delay any process. Most of the local strategy development processes lasted 4 to 6 months, and occurred concurrently, which put a great strain on staff and advisors. Having a sustainable staffing structure that can adjust and respond to external circumstances is necessary to make this process possible.