

## bi3 Grantee Focus Groups Report

Executive Summary | October 2022

[bi3](#), a Greater Cincinnati philanthropic initiative to transform health, applies a Trust-Based Philanthropy (TBP) approach and a racial and health equity lens to its work while fostering collaboration amongst grantees and sharing lessons learned with the community. To gather feedback to improve its trust-based grantmaking practices, better support grantees, and understand the effect of bi3 funding on grantee projects, bi3 engaged [Data Shine](#), a small woman-owned evaluation agency, to host two focus groups with current and former grantees.

This executive summary presents high-level findings from the focus groups, which included 14 participants and five survey responses from invitees who could not attend. Throughout the overview, we offer "anchors" to [The 6 Grantmaking Practices of Trust-Based Philanthropy](#) and [Trust-Based Philanthropy in 4D](#), championed by the Trust-Based Philanthropy Project, to connect focus group findings to TBP practices and values. Finally, [Drawnversation by Brandon Black](#), a visual scribe, graphically recorded the focus groups in real time. Drawnversation's final illustration is presented on page 4 and offers a powerful lens to view the focus group conversations.

### What is Working

#### bi3 collaborates with grantees to increase the chances of success

bi3, data indicate, increases chances of funding success by being clear upfront about whether an idea is a good fit, ideating on proposal development, and keeping organizations "on file" for right-sized opportunities. Additionally, bi3's collaborative style moves past the application stage, providing appreciated thought and implementation partnership to improve funded initiatives.

*"Chats and discussion during the letter of intent and grant process...is a unique approach that ...is truly a gift."*



TBP  
Anchor

bi3's collaborative, supportive approach -- a theme present throughout the focus groups - strongly resonates with many TBP practices, including **do the homework**, **simplify & streamline paperwork**, **be transparent** and **responsive**, and **offer support beyond the check**, thereby

strengthening proposals and programming. Doing so expresses the values to **center relationships** and **partner in a spirit of service**.

#### bi3 trusts its grantees as "experts"

Responses illustrate that bi3 puts into practice the commitment to trust its grantees by permitting real-time adjustments to the project, being judicious in oversight requirements, and operating under the philosophy that "not everything will go as planned."

*"They **trusted us to be...experts...** I couldn't imagine going through that process with another funder."*



TBP  
Anchor

Another prominent finding, data indicate that through their pragmatic understanding and approach toward grantee pivots, bi3 embodies the TBP tenets to **trust nonprofits to know how to best spend grant money** and **embrace learning**.

#### bi3 is accessible and gives access...for the long-haul

bi3 helps nurture connective tissue amongst its network -- a tendency often noted to be in contrast with other funders -- by connecting grantees to each other and to soft and hard capital. Some further noted that bi3 utilizes close knowledge of grantees and community issues to facilitate this network and ensure these connections are salient and timely.

Another dimension is that the relationship is not tethered to a timeframe. Numerous respondents described that even after funding sunsets, bi3 checks in on the state of projects, remains an accessible resource and valuable partner, and continues to make thoughtful connections proactively.

*"bi3 goes above and beyond to say, **"We are in it with you for the long-haul...to stay connected to ensure your mission...because we've invested in you."***



TBP  
Anchor

bi3, evidence indicates, makes connections on behalf of grantees, which is consistent with the TBP practice to **provide support beyond the check** and the TBP value to **redistribute power**.

## bi3 enables grantees to "test innovation"

Multiple grantees cited that bi3 funding enabled them to innovate new programs. Notably, an undercurrent around innovation is that bi3 is not only willing to take risks, but staff also readily acknowledge and respect that outcomes, especially systems outcomes, take time.

*"They have allowed us to safely test innovation with enough time to really learn some things."*



TBP  
Anchor

A manifestation of the value to **embrace learning**, the willingness to take risks alongside grantees also signals **trust that nonprofits know best how to spend grant money** to shape programming.

## bi3 lives out equity commitment

A recurrent pattern in the meta-analysis is that bi3 puts its commitment to health and race equity into practice through consistent messaging and steady, sustained action. All in all, there was no evidence of contraction in statements, suggesting that bi3 is performative in its commitment to equity.

*"Boldly saying this is what we are doing in terms of...equity...the accountability of who they are funding [matching] what they said they would be doing."*



TBP  
Anchor

The data consistently show that bi3 is firm in its stance to **work for systemic equity** at the critical intersection of race and health.

## Constructive Suggestions for Improvement

In addition to the positive feedback outlined, respondents provided actionable ideas for improvement, which fell into the seven thematic areas discussed below. (Note, these suggestions were shaped by a participatory analysis session with two bi3 staff and four external partners.)

### 1. Be flexible & adaptive with grant check-ins

Though the general chorus is an appreciation for many aspects of bi3's reporting requirements (e.g., understanding when it comes to delays, co-creating relevant metrics, accepting alternative formats), respondents suggested making check-ins more structured with clear expectations and less frequent, in addition to using video.



TBP  
Anchor

Conversational approaches, used to **simplify & streamline paperwork** as a TBP practice, may benefit from a more formal format and clarification of expectations to help grantees feel confident that they are prepared, and the right people are present.

### 2. Clearly communicate bi3's goals, definitions, & requirements for funding

A bulk of comments merged around the sentiment that organizations struggled with feeling confident in what bi3 views as fundable or the "magic sauce." Many comments centered on uncertainty related to bi3's partnership with TriHealth and definitions of innovation and transformation.



TBP  
Anchor

Aligning with the practice to **revisit grantmaking criteria to understand how it may give unintended preference**, it may be possible that those with less bi3 history and less capacity to write grants struggle most with their interpretation of the "magic sauce" and, therefore, their eligibility status to qualify for funding.

### 3. Expand bi3's relationships with, and opportunities for, smaller, community-based organizations

A concern voiced was whether bi3 is casting a net wide enough to reach small organizations, especially those "in the trenches" tasked with doing it all, including fund development and reporting. Not only is the capacity concern on the organization side, but real (understandable) constraints also exist on the bi3 side. Suggestions to bring more small organizations to the table include offering opportunities to build grant writing skills, providing flexible and accessible funding, and asking the bi3 community to recommend organizations to fund.



TBP  
Anchor

This clear call is consistent with the TBP practice **to look beyond your usual circles to identify organizations** to fund, and the accumulated data suggest a more systemized approach to reach small organizations and bring them, capably and confidently, into the funding network.

### 4. Incorporate community voice into decision making

Most of the comments in this category coalesce around the suggestion to ensure that bi3's board has some genuine community representation. In

addition, one related comment is to "get direct feedback" from the community about impact of bi3 grantees' collective action.



TBP  
Anchor

The recommendation to center community voice has the power and potential to deepen bi3's adoption of the TBP values to **redistribute power, work for systemic equity**, and to **be accountable** to grantees and communities.

## 5. Provide feedback to applicants, particularly when grant applications are declined

A subset of quotes focused on how information on the "why" behind a declination would be helpful, given that even letters of intent require an investment of time and resources. For these recommendations, focus group discussed how the desire to "give feedback is always there," and yet this is coupled with bi3 capacity limitations. The other suggestion was to provide that simple – yet vital – piece of information upfront: the amount available for each round of funding.



TBP  
Anchor

An act of **transparency and responsiveness**, feedback on declinations can be used to inform the decision to reapply in the future, improve proposals to bi3 and other funders, and even influence strategy. The simple – yet time-consuming – practice of providing feedback can help **correct power imbalances** by reducing information asymmetries while **centering relationships** and heightening the **partnerships in the spirit of service**.

## 6. Provide operational and sustained funding

Another gathering of quotes centered on how organizations need funding to sustain working programs rather than to innovate new programs. In practice, this includes funding what is needed to operate, funding what is working to maintain programs, and making knowledgeable connections to other funders.



TBP  
Anchor

**Giving multi-year unrestricted funding** is a touchstone of the TBP approach and one that grantees hope to see more of, to fund "what is needed" (i.e., operations) and what's working (i.e., established programs).

## 7. Continue connecting & sharing out

In addition, focus group data revealed that respondents would like bi3 to more fully and frequently nurture those linkages amongst its network, including facilitating grantee-to-grantee and grantee-to-funder connections and sharing the good work and successes of peer grantees.



TBP  
Anchor

Grantee respondents would like to see more of this, which largely falls under the TBP practice to **provide support beyond the check** and lines up with the TBP value to **redistribute power** (or use power in the service of others and equity).

## Conclusion

Overall, the body of data emits the resounding theme that bi3 occupies a unique space as a funder for its current and former grantees in which it lives out an authentic relational approach to grantmaking that is grounded in trust, intentionality, learning, and a genuine desire to see grantees (and by extension, their beneficiaries) succeed. The constructive areas for improvement mentioned, if implemented, each have the potential to help deepen ties to the principles, practices, and values that combine to demonstrate a full-bodied adoption of trust-based philanthropy.

Lastly, one of the TBP main principles is to **Solicit & Act on Feedback**, of which the act of hosting the focus groups was in its very nature the implementation. Further, by hiring an external firm and articulating the clear need to establish safeguards to protect participant confidentiality from the start, bi3 helped to create a space for reflection and dialogue that considered the inherent power dynamics present in a funder/grantee relationship and, theoretically, helped to reduce bias. bi3 also compensated participants to express gratitude for their time and thought and will provide a response to the report discussing how data will be used, again major action steps in this principle.

*\*[Click here](#) to access the full bi3 Grantee Focus Groups Report, including methods and works cited.*



The final design of the live illustration of the two focus groups with bi3 current and former grantees as drawn by Drawnversation by Brandon Black.

**bi3 GRANTEE FOCUS GROUP**

- KIND
- FLEXIBLE
- TRANSPARENT
- RESPONSIVE
- bi3 IN
- SUPPORTIVE
- LEADERSHIP
- 1-3 WORDS
- INNOVATIVE
- TRUSTWORTHY & TRUSTING
- PARTNERSHIP COLLABORATIVE
- IDEAL
- BOLD
- APPROACHABLE

**MEETING YOUR NEEDS**

- \* BEYOND FUNDING
- REAL PARTNERS WALKING SIDE BY SIDE WITH US
- PROACTIVE ACCESSIBLE TO ASK FOR RESOURCES
- SHARING
- FINDING DURING PANDEMIC FOR UPGRADES
- CONNECT TO NATIONAL FUNDERS
- VISITED OUR ORG'S CAMPUS SAW OUR VISION
- A BRIDGE TO OTHER ORGS

**HOW ELSE CAN WE HELP?**

- FUND AGENCIES THAT SERVE ALL PATIENTS ACROSS ALL REGIONAL MEDICAL SYSTEMS
- CURRENTLY ANCHORED TO TRI-HEALTH
- SET ASIDE FUNDS FOR SMALL SCALE GRANTEE APPROACHES
- MORE CLARIFICATION ON WHO QUALIFIES FOR WHAT
- DEMYSTIFY GRANTMAKING
- & CORE INITIATIVES

**bi3 GRANTEE FOCUS GROUPS**

**IN GRANTEES**

- MICRO MANAGEMENT
- WE HAVE DECISION MAKING POWER
- RECEIPTS NOT REQUIRED
- DELATED REPORTING
- WILLING TO TAKE RISK TOGETHER

**TRUST**

TRANSPARENCY IN COMMUNICATION & PRACTICES

COMMUNICATION IS HONEST & FORTH-RIGHT FROM THE START

IT'S A NO... **INTEGRITY** WHAT THEY SAY = WHAT THEY DO

**IMPACT**

TEST SAFELY

SUPPORT THROUGH ALL PHASES

BETTER TECH SECURITY FOR OUR CLIENTS

CHANGING DYNAMICS

HELPED US ADAPT AND BE RESPONSIVE

AMPLE TIME TO DEVELOP

FUNDING KEPT US GOING

bi3 IS PATIENT w/ RESULTS INVESTED IN THE LONG HAUL

**bi3 GRANTEE FOCUS GROUPS**

*How might we* **IMPROVE**

**EARLY PROCESSES**

- ONE APP BIG & SMALL
- MULTIPLE TOUCH POINTS
- LOI A SIMPLE PROCESS
- CHATS WERE HELPFUL
- SELF-DEFINED
- MORE SUBMISSION FORMAT OPTIONS
- USEFUL FEEDBACK
- A. B. @ C. D.

**REPORTING SYSTEMS**

- CREATIVE METRICS
- DELAYED REPORTING

**OVERALL APPROACH**

- BATCH STEPS
- 3RD PARTY REVIEWER PRE LAUNCH
- USER FRIENDLY APP
- LESS CALLS
- COULD EMAIL TO CHECK-IN
- CONFERENCE CALLS... DELAYS, INEFFICIENT
- MORE STRUCTURE
- 1. PURPOSE
- 2. WHO
- 3. DATA PREFERENCES

**RACE & HEALTH EQUITY**

- LARGE FUNDING IN SYSTEM CHANGE
- INTENT IS LOUD & CLEARLY STATED
- KEEP LEADING BY EXAMPLE
- WHO & WHAT IT FUNDED (ART MUSEUM EVENT)
- BOARD ACCOUNTABILITY
- REQUIRE INCLUSIVE BOARDS
- CELEBRATE WHAT WORKS & ALL ABILITIES