

# bi3 Grantee Focus Groups Report

An examination of the processes &  
outcomes of a trust-based  
grantmaker

**bi3** BETHESDA  
IDEAS  
INVESTMENT  
IMPACT

Prepared by Data Shine | October 2022

# 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.

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
- LEADERSHIP
- TRUSTWORTHY & TRUSTING
- IDEAL
- BOLD
- APPROACHABLE

bi3 IN 1-3 WORDS

- SUPPORTIVE
- INNOVATIVE
- PARTNERSHIP COLLABORATIVE

**MEETING YOUR NEEDS**

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

**HOW ELSE CAN WE HELP?**

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

**bi3 GRANTEE FOCUS GROUPS**

**IN GRANTEEES**

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

**SIGNALING**

**trust**

**TRANSPARENCY IN COMMUNICATION & PRACTICES**

- COMMUNICATION IS HONEST & FORTH-RIGHT
- IT'S A NO...
- FROM THE START
- INTEGRITY
- WHAT THEY SAY = WHAT THEY DO

**TEST SAFELY**

**IMPACT**

- SUPPORT THROUGH ALL PHASES
- BETTER TECH SECURITY FOR OUR CLIENTS
- CHANGING DYNAMICS
- HELPED US ADAPT AND BE RESPONSIVE
- AMPLE TIME TO DEVELOP
- FINDING 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 OR SMALL
- MULTIPLE TOUCH POINTS
- LOI A SIMPLE PROCESS
- CHATS WERE HELPFUL
- MORE SUBMISSION FORMAT OPTIONS
- USEFUL FEEDBACK

**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
- KEEP LEADING BY EXAMPLE
- INTENT IS LOUD & CLEARLY STATED
- BOARD ACCOUNTABILITY
- WHY & WHAT IS FUNDED TO ART MUSEUM EVENT
- REQUIRE INCLUSIVE BOARDS
- CELEBRATE WHAT WORKS & ALL ABILITIES



# Introduction

To carry out its purpose of "leading the way to a day when every person has a fair and just opportunity to be as healthy as possible; when a person's health can no longer be predicted by race, ethnicity, ability or zip code," 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 and sharing lessons learned. To assess its processes around these aims, bi3 engaged Data Shine, a small woman-owned evaluation agency, to host two focus groups with current and former grantees to gather feedback to improve trust-based grantmaking practices, better support grantees, and understand the effect of bi3 funding on grantee programs.

## Methods

Data Shine began with a cursory review of the literature on the dimensions of trust and equity in philanthropy, which suggested that trust is crucial to leading successful, sustainable philanthropy that makes a difference; drives social movements; and promotes diversity, equity, and inclusion. However, at the time of our review (Spring 2022), we found little scholarly, evidence-based research specific to TBP as a philanthropic model. Most TBP literature uncovered was from a handful of notable foundations involved in trust-based philanthropy. There appeared to be more scholarly, evidence-based literature on participative grantmaking, which is a crucial aspect of TBP. *(Note, we acknowledge that the Trust-Based Philanthropy Project is committed to growing this body of work and has since published [focus group results](#) on whether executive directors perceived "shifts in power dynamics in their funder relationships," though it was not released at the time of our framing.)*

## Sample

With this framing, bi3 and Data Shine collaborated closely to develop the data collection tools, consent forms, and sampling frames. We recruited individuals using instrumental-use multiple case sampling, which is used for the purpose of informing professional

practice and program decision-making (Patton 2015). We then divided these purposefully sampled individuals into two groups: multi-year grantees and smaller, capacity building grantees, most of whom received funding for the first time during the COVID-19 response.

## Recruitment

All outreach communicate expressed the purpose of the focus groups; Data Shine's role as an external evaluator to uphold confidentiality; details on Drawnversation by Brandon Black, the visual recorder that would be present at the sessions; sign-up instructions; and current health and safety guidelines. These emails also included a consent form and a pre-questionnaire to capture an early sense of the relationship with bi3 and collect demographics. The diagram that follows depicts recruitment steps.

### Recruitment began with an announcement from bi3, which was then followed by an email invitation with sign-up details and multiple friendly reminders.

We replaced non-respondents in the capacity building grantee group. This was not possible with multi-year grantees, as the full universe was invited.



Out of 12 multi-year grantees invited, nine participated. For the 13 capacity building grantees initially invited, seven responded in the positive. To fully seat the focus group, we replaced non-respondents with six more people. In the end, we expected nine participants, though four people kindly contacted us to withdraw due to work conflicts or health reasons, leaving five total on the day of the event.

For those who were not able to attend the event or had to withdraw participation (n=9), we sent a survey containing a handful of the focus group questions; five people completed this survey, and their responses (largely resonate with what we heard in the focus groups) are seamlessly integrated with focus group data.

## Protocol

The overarching goals of the grantee focus groups – paired with findings from the high-level literature review – shaped the protocol, which went through several iterations between the bi3 and Data Shine team. After some light framing questions, the protocol first explored implementation characteristics associated with the mechanics of bi3's grantmaking, including their requests for proposals and grant reporting requirements. Next, we moved the conversation onto an examination of the various ways that bi3 lives out its commitment as a trust-based grantmaker dedicated to racial and health equity. We also dug into how bi3's support contributes to grantees' work. Seeded throughout the protocol were prompts for participants to offer recommendations to improve procedures, programs, and policies.

## Analysis

First, as mentioned earlier, Drawnversation was onsite to illustrate the focus group conversations, including themes, in real-time. The resulting visual recordings are included in this report and complement the analysis by Data Shine and participatory analysis through the data party, as described below.

In addition, we analyzed data from the pre-surveys completed by those who signed up for the focus group, using simple frequencies and unit charts due to the small number of participants.

Finally, we utilized Dedoose to run first- and second-cycle coding to identify salient meaning units in the cleaned focus group transcripts. Our eclectic coding style combines "in vivo" codes that use participants' wording with process codes (or those ending in 'ing). Our early coding process produced 44 minor codes that were rolled up into six loose categories. From here, we determined that we could further zoom out on these categories and divide them into positive feedback and opportunities for improvement. Data Shine felt confident in analyzing strengths, which is a retelling and synthesis that requires little action. For opportunities for improvement, with the help of bi3, Data Shine convened a participatory analysis session (or data party) on June 24 to request the six attendees (two bi3 staff and four external partners) to provide sensemaking assistance in making data-based recommendations. The results from the data party are featured by each major recommendation grouping.

## Limits

From the start, bi3 was clear that a firewall needed to be in place to ensure focus group participant comfort in voicing candid and perhaps even critical opinions. Therefore, Data Shine – with review from bi3 – clearly outlined how confidentiality would be protected in all pre-focus group communicate (e.g., completely de-identified data; only Data Shine would handle recordings; bi3 would not see transcripts). We also asked respondents in the pre-questionnaire what concerns they had about the focus groups to more fully address them beforehand. Even with these firewall measures in place, there may be a level of social desirability bias that we cannot control for given the clear power imbalance between funder and grantee.

In addition, to "be reflective and reflexive" the primary author/evaluator raises the possibility that their positionality may have influenced responses. For instance, the evaluator was an outsider to the community, which may have led to missing nuances or misinterpretation of data. Too, the functional role of an evaluator is often viewed as punitive, potentially polluting interactions. Finally, the evaluator's own perceptions and background can influence data collection and interpretations. Though not perfect solutions, we attempted to mitigate bias in the evaluator's inherent positionality through the participatory analysis session, where multiple people discussed implications of the data and early findings and had multiple reviewers on the report.



# Findings

## Composition + Initial Impressions

A short pre-survey sent to focus group invitees beforehand captured demographics; 14 people responded (every focus group participant). Gender identities of the focus group participants included 12 participants identifying as women and two as men. For race/ethnicity, 10 participants were white, and four were Black. We also used the presurvey to get a snapshot of the tenor of perspectives about bi3. From this survey, we first learned that respondents were generally positive about bi3 – all but two respondents were considered "promoters" as calculated using a traditional Net Promoter Score. In addition, as shown below, a substantial share of respondents feel respected by bi3, believe bi3 meets their needs, and find it easy to get support from bi3.

In a short pre-survey before the focus group, data indicated that overall, **respondents felt positive** about bi3 and their relationship to bi3.



## Thematic Analysis

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

A conversation thread that produced a general atmosphere of agreement is that bi3 is open to helping applicants determine whether they should invest the time and resources to apply for funding based on the fit of their concept to the funding opportunity. As one person stated, "You call them and **ask, is this idea something that fits...and they are**

**transparent** in general, including this isn't the pot of money for you, and it's like thank you for not making me write this grant" in which another person added, "That's the exact conversation I had...It is way better than spending hours in meetings...I left **feeling respected, that was invaluable.**" By providing this level of transparency around fit, bi3 helps organizations be more accurate in analyzing the benefits and costs of proposal development.

bi3's transparency around fit extends into their willingness to iterate concepts and proposals, an experience recounted by multiple participants. As evidenced in the following quotes, **bi3 staff dedicates energy to help organizations calibrate funding requests**, which, as one person stated, has the outcome not only of a greater likelihood of funding but, enables them to "change interventions in our community and to interact in our community differently than we could have otherwise."



- **Chats and discussion during the LOI and grant process...is a unique approach that is incredibly helpful.** We have taken advantage of multiple touch points with bi3 throughout the application process. This is truly a gift to an organization.
- I can call them and say that I have this idea...what do you think? **They will help get it into the space where I think they can fund it...** That's allowing us again to change interventions in our community and to interact in our community differently than we could have otherwise.
- It was building a relationship over time and then during the proposal process, **we would provide our pitch and then really distill it into the format their board would accept.** It was more collaborative and back and forth.
- **They ask great questions: Did you think about it this way?** Maybe you can add that to it? [bi3] allowed us to hone in on our project a lot better and write a successful grant going forward.

A few others further illustrated bi3's intentionality to increase the chances of success and support nonprofits. For instance, bi3 accepted a funding application (and subsequent report) that one respondent developed for a completely different funder. Another respondent recounted when bi3 made good on the promise to "keep [them] in mind" for right-sized and right-fit funding opportunities.

A rejection from bi3 doesn't feel like the same type of rejection from others because they say: it's a great story, it's a great project, **if something comes up, we will keep you in mind...** **They really did follow through with what they said...**They came back and really made good on it.

bi3's collaborative style moves past the application and into implementation. Focus group data suggest that grantees see **bi3 as a partner in thought and in implementation.** As one person stated, "It is being a partner along the way, and I saw them be a partner as we had to change strategies." Various grantees recollected similar experiences of bi3 staff acting as partners in the work and asking grantees how they can help innovate.

When respondents were asked to describe bi3 in one to three words, the **comments painted a picture of an authentically relational approach to grantmaking**, including being kind, responsive, trustworthy and trusting, approachable, and collaborative –

strongly resonating with the lines of inquiry further explored in the conversation and explained already.

Keywords used to describe bi3 illustrate their authentic relational approach to grantmaking.



*Drawnversation By Brandon Black*

bi3 trusts its grantees as "experts"

Along the same lines as "being real partners in this work," data suggest that bi3 puts its commitment to trust its grantees into practice. This trust, according to data, is "unheard of" and **empowered grantees to be able to adjust quickly**, especially amidst the turbulent healthcare environment COVID-19 created.



- Part of our project... wasn't going to work...and we called [bi3] and **they said 'you know your business better than we do, tell us how you want to use it, and tell us what you want to do, and we will work with you on it'...** This is trust. They trust their people that they will do it.
- **They have given us leeway when things have changed in the process**, like updating our technology during COVID-19 to be able to work with telehealth... We were able to request and get a later deadline... It made a big difference in how well we were able to use the dollars for the intended purpose, etc.
- They **trusted us to be the experts around what needed to happen**, and they provided the support which was very comforting because **I couldn't imagine going through that process with another funder.**

Further, this sense of trust is apparent in comments not only in the abstract but in a practical way: bi3 "**wholeheartedly**" **believes grantees** even without having to argue a detailed case for pivots, regular check-ins, or paper trails, thus reducing the burden and redirecting attention to mission.



- I scheduled meetings to check in, **but it wasn't like every time that something happened, I needed to contact them.** They really just trust us to get the work done within the changing environment.
- I was saving receipts, putting them in a stockpile... But they did not ask for that, and I was shocked that they didn't... I was like **they trust that you spent their money where you said you were going to spend it...** With that, all that COVID-

19 money, [others] wanted every receipt, everything... I feel like that was a great amount of trust for [bi3] to say, 'I trust that when they say that they spent this percentage, or this whatever, that that's what they did'.

bi3 signals trust by allowing grantees to be the "experts" without heavy-handed oversight or inflexible mandates. Drawnversation's visual recording depicts how various respondents signaled that bi3 trusts its grantees.



Drawnversation by Brandon Black

bi3 supports learning and adaptation

Building on the finding that bi3 trusts their grantees as "the experts," bi3 also supports learning based on practice and is forthright in their acceptance that "**not everything will go as planned.**" bi3, the data thereby indicate, enables grantees to recalibrate programs, policies, and procedures based on implementation experiences and context shifts.



- I appreciate that **bi3 is very open to learning**, and **not expecting everything to go as planned.** That's wonderful.
- Our grant was around COVID-19, and we wouldn't have been able to be responsive...if we didn't have that flexibility...**we needed to be flexible in whatever our support looked like.**
- We had a project funded that...the data didn't support that it worked. But **we could have open dialogue about that...**sometimes you learn more when something doesn't work.

## bi3 enables grantees to "test innovation"

Multiple grantees cited that bi3 funding enabled their organization to build new programs, providing evidence that **bi3 takes action congruent with a centerpiece of its mission: to fund innovation.**



- I don't know of another organization that would have **helped us to launch a brand-new program.** They have helped us more than once on that.
- I was going to say innovation for us...**The ability to be innovative** and embark on this work specific to the Cincinnati area.

Importantly, an undercurrent around innovation is that bi3 is not only willing to take risks, but the **staff readily acknowledge and respect that outcomes, especially systems-level outcomes, take time.** In this vein, they are generous in respect to a wide timeline for implementation and outcomes, and data also indicate that bi3 tends to set reasonable timelines that can shift based on need. Respondents commented that bi3 understands that some results are not immediate, and grantees were allowed to "safely test innovation with enough time to really learn some things."

Data indicate that bi3 follows through on the principles of "support beyond the check" by thoughtfully connecting current and former grantees to resources, other funders, and organizations and "investing in innovation" by allowing new programs time and space to mature.

## bi3 is accessible and gives access

Rounding out the data on the collaborative approach bi3 takes, respondents provided concrete examples of how **bi3 helps to nurture connective tissues amongst its network,** a characteristic often noted to contrast with other funders. For example, bi3 is "someone you can email" compared to "[other funders who] say to reach out if you need something...but on this timeline, and if not, you aren't going to get a response," and "Even if I didn't know [bi3 staff person] I would feel like I knew her...like, we are friends...There are grantors that you can't talk to anybody...It is all computer, all business." Several respondents emphasized that trust is not a one-way street, again emphasizing the relational nature of bi3's grantmaking.

Focus group respondents also discussed how **bi3 thoughtfully connects grantees to each other and to both soft and hard capital.** For example, some pointed to putting grantees in front of bi3's board to demonstrate "trust" and "transparency" while being "opportunity driven:" "That is an access point that they are demonstrating trust but there is also some transparency there to being asked to share your work with the board."

Still, others described how **bi3 utilizes their close knowledge of grantees and the issues to connect them with relevant funding and partnership opportunities,** helping to create relationships and facilitate opportunities that have the potential to fortify organizations and make progress on "collective impact"; see examples below.



- I've had emails saying '**Hey, were you aware of this grant?**'
- Something [bi3] has done is...introduce this person, and so they are comfortable with me, and **now we are all having a conversation and asking questions.**
- They want success for programming as much as I do as a program leader. They have **endorsed, advocated, and supported** all of our work in so many ways.

Another demonstration of bi3's access was in grantees' recap of site visits. As one person stated, "We have been in their offices, but they have been in our offices." Site visits help to personify where funding goes, and help educate and inspire, according to respondents' statements.



- The staff of bi3 accepted our invitation to visit our organization. Once on campus, they were able to not only see our vision, but **felt the impact of our programming** as well as shared our enthusiasm to serve the community.
- They come to your office. We create an advisory board for our program, they asked can we sit in and listen **as a way to understand what you are doing.**

### bi3 is "in it for the long haul"

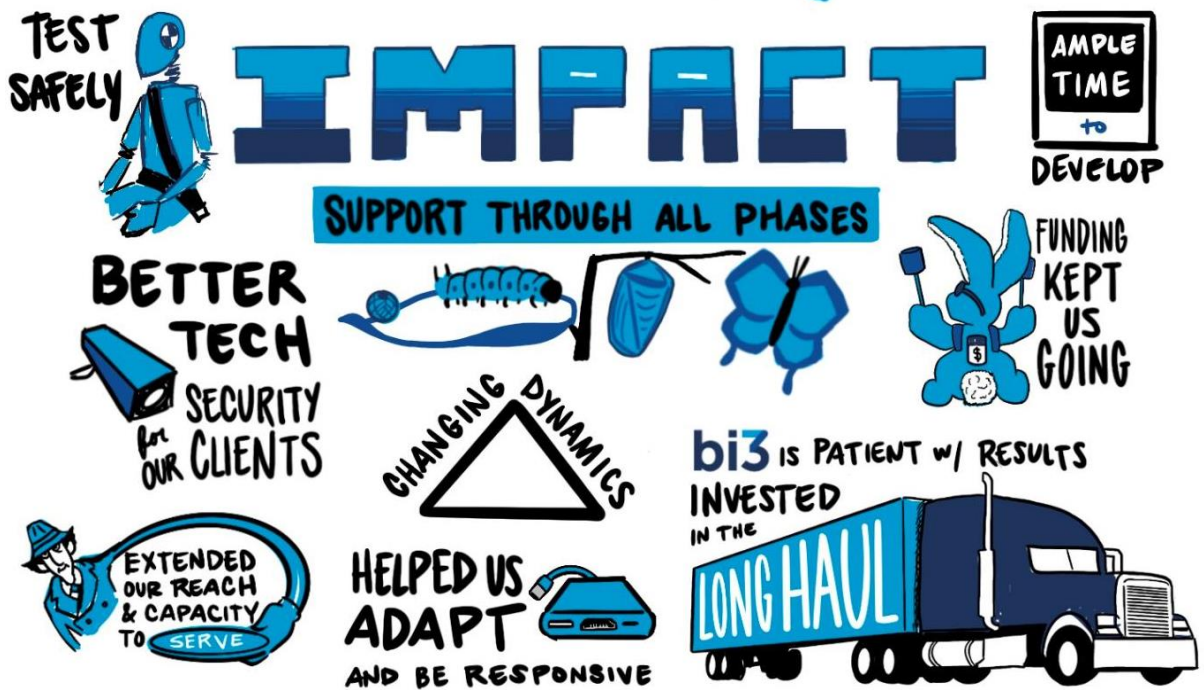
Another dimension of their relational approach to grantmaking is that the relationship with grantees is not tethered to a timeframe. Numerous respondents described that **even after funding sunsets**, bi3:

- Regularly checks in on the state of programs,
- Remains an accessible resource and partner, and
- Continues to proactively make thoughtful connections to opportunities.



- **bi3 wants to stay connected** with you even after they funded you. They always keep that eye...like a friend... You have organizations that after they fund you, you don't hear anything else from them...**bi3 goes above and beyond to say, 'We are in it with you for the long-haul...'** You can still reach out even though we're not funding you...to stay connected to ensure your mission continues because we've invested in you.'
- Even when the funding is over, they continue that...having meetings where they are **continuing to connect us to other people** in the same space with the goal for funding or advocacy or whatever it is, that's incredible...really unusual...and really valuable.

In addition to still facilitating connections with and for former grantees, a few respondents described the value of bi3's proactive involvement in media relations on behalf of grantees. One grantee shared that bi3 "**promoted us through social media**...sharing a lot of our content... It's a voice because they have more connections," while another commented, "They suggested we connect with [a news station], and they facilitated reporters coming onsite... It ended up helping capacity in a lot of ways, really after the funding was over is when the biggest win came. It truly has had an impact."



Drawnversation by Brandon Black

bi3 lives out equity commitment

A recurrent pattern in the meta-analysis of the data is that **bi3 puts into practice its commitment to health and race equity through consistency in messaging and steady, sustained action.** As evidenced in the following quotes, bi3 is consistent, responsive, and committed to its equity practice.



- **Boldly saying this is what we are doing** in terms of...equity...with the transparency of what they are funding, matching who they fund, and the accountability of who they are funding to **what they said they would be doing**. That whole transparency process for me is where the integrity lies.
- They do it **again, and again, and again**. It's not a one time or two off. You see **their language...their intentional messaging. It is consistent**.
- They are as **clear about [equity in the board room]** as they are on the **website, in meetings, where they fund**. I feel like it's the **same message** all the time... it's clearly stated, and they don't waver.

## Processes + Procedures that Work

Focus group participants outlined various bi3 systems that undergird its relational, trust-centering approach, often which occur at the time of reporting, including allowing grantees to select (and evolve) reporting metrics, utilizing user-friendly formats, and being flexible in reporting deadlines.



### Accepting (and encouraging) alternative formats

Though suggestions for improvement will be discussed later, all in all, evidence indicates that participants value the opportunity to utilize alternative formats to apply and report, such as unstructured LOIs and pitches to apply, and emails, videos, and calls to report.

- [We] had to **create our own format and send in the LOI**...I liked that better.
- We measure...social connectedness. They allow us...**interesting and innovative ways to create data, to collect data that doesn't seem like we are invading our people's sacred space**...



### Generous + flexible timeline

As mentioned earlier, bi3 acknowledges that impact takes time, so they are generous in respect to a wide timeline for implementation and outcomes. Zooming in, however, data also indicate that bi3 tends to set reasonable timelines that can shift based on need.

- I appreciate the flexibility with doing the recording...and allowing us to take a little bit more time.
- They have a long runway...I appreciate their timeline.



### Reporting on existing metrics

Respondents expressed gratitude that bi3 permits them to report on metrics they already have in place and to adjust those metrics as they go.

- I filled out what we do in the metric piece, coming alongside them [with] what they need, but also **what are things we are already looking at**.
- They allowed me to use tools that we use internally. **I created the same thing and tracked in the same way** that we have had for federal grants and different things that are far more complex.



### Straightforward, easy, and commonsense processes

Both application and reporting, most data show, are found to be uncomplicated and reasonable.

- I found it **straightforward and easy**.
- It was very **common sense** as far as reporting.





# Actionable Ideas

Actionable ideas for program improvement were interspersed throughout focus group conversations. In addition, a section of the focus groups specifically probed for constructive suggestions for improvement. To analyze data and develop recommendations, Data Shine hosted a participatory analysis session with six attendees, including bi3 staff, staff from other foundations, grants committee members, and former grantees. During the session, participants were asked to search through quotes for actionable areas for program improvement. Then, using a magic quadrant exercise ([see example here](#)), the group determined the effort and impact ratio for these ideas. This process led to the production of the following seven recommendations for consideration:

- 1** Be flexible & adaptive with grant check-ins
- 2** Clearly communicate bi3's goals, definitions, & requirements for funding
- 3** Expand bi3's relationships with, and opportunities for, smaller, community-based organizations
- 4** Incorporate community voice into decision making
- 5** Provide feedback to applicants, particularly when grant applications are declined
- 6** Provide operational and sustained funding
- 7** Continue connecting & sharing out

Below, each of these ideas is expounded upon and paired with supporting statements captured during the focus groups with current and former grantees.

## 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 metrics, accepting alternative formats), respondents enumerated a few opportunities for improvement regarding **check-in phone calls**, including providing more structure, reducing the frequency, and using video.

<b>Clarify check in purpose</b>	<ul style="list-style-type: none"> <li>I would say maybe a little more structure. There were no parameters... It might help to have...survey questions that we respond to and then...talk more in depth on the phone.</li> <li>Clarity of who should be [on the call]...We were always scrambling a bit to figure that out.</li> </ul>
<b>Reduce checks ins</b>	<ul style="list-style-type: none"> <li>There was one too many calls...The calls are beneficial, but we keep saying the same thing... I didn't have anything new to report.</li> <li>The phone calls were a little bit overkill. It could've been an email. We're smaller as well so we don't have a whole team to facilitate all these.</li> </ul>
<b>Use video for check ins</b>	<ul style="list-style-type: none"> <li>[On our] conference call, there was a lot of delay, there was 3 of us on the call, so a Zoom would've been much better... The conversation, it didn't flow very well...we had to keep repeating each other and we couldn't see who was talking.</li> </ul>

The tactical nature of the suggestions makes a relatively easy lift, such as providing the option for video and an agenda. That said, additional ideas for improvement include:

- **Providing options** for grantees to select from to identify check-in format and frequency that will work best for grantees while clearly outlining requirements and expectations
- **Outlining information sought ahead of time** so grantees can feel confident coming to the meeting prepared and with the right people present
- **Building in a feedback loop** to ensure that the check-in structure and cadence continue to work well for grantees and permitting adaptations as necessary

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

A bulk of comments merged around the sentiment that **organizations struggled with being confident in what bi3 views as fundable**: "We have applied multiple times and we have gotten one. I honestly do not know what the magic sauce is to do that." Most comments, as shown below, centered on uncertainty related to a "fog" around whether organizations must partner with TriHealth or their programs are "innovative" or "transformative" enough. Boiled down, these recommendations center on remedying communications-based pain points by **clearly defining terms**, decision points, requirements and **utilizing accessible, straightforward language**.

<b>Clarify TriHealth partnership requirements</b>	<ul style="list-style-type: none"> <li>• The question I always have with bi3 is, am I even eligible?... They would need to state whether TriHealth entities can apply.</li> <li>• Having to think about and worry about if I have TriHealth somewhere in this? When that may not be the right fit for the project or the idea...rather than forcing an idea...it would be better to just not have to think about it.</li> </ul>
<b>Clearly define terms</b>	<ul style="list-style-type: none"> <li>• We were looking to apply to [a grant] and thought it was a great fit for [us]...we kind of self-selected out...because of two words: transformative and innovative. We just weren't sure if we could meet that standard with those programs.</li> <li>• I mean if we had to point to [eligibility] and say what does that [definition] mean, do we fit, are we transformative enough?</li> </ul>
<b>Communicate regional balance</b>	<ul style="list-style-type: none"> <li>• I wonder... regionally, where [is] the focus of their resources?... I'm just wondering what the balance is there?</li> </ul>
<b>Examine the readability &amp; accessibility</b>	<ul style="list-style-type: none"> <li>• Maybe having some feedback or having a person on the outside review those grants [opportunities] before they're sent to the public...so the average person reading these grants [opportunities]...can understand...they don't need to email the person over at bi3 to understand this question.</li> </ul>

**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. As one person stated: "I just wonder for those small organizations who haven't written a grant but who go for every dollar...Do you miss those people...I always wonder how do you bring new small people to the table?" Not only is the capacity concern on the organization side, real (understandable) constraints exist on the bi3 side, too:

When we think about how philanthropy works, a lot of us have talked about relationships. What do they need to do to make sure that they have relationships with the masses? [bi3] has a small staff, too. I don't know how...funding is based off relationships and who you know. I think that it's being intentional about how you build relationships.

Grantee feedback (see quotes below for examples) and data party analysis led to the following recommendations:

- Offering **educational opportunities** to provide grant writing skills
- Establishing a **smaller flexible fund for smaller organizations** to eliminate the need to compete against larger organizations
- **Keeping processes simplified and streamlined** to ensure access for those with limited capacity
- **Leveraging current and former grantees' deep community knowledge** by asking "which organizations should we fund?"

<b>Build skills</b>	<ul style="list-style-type: none"> <li>• Our organization is working with small organizations; if we can interview them and help them do a blog, that will help them get it out. They are not going to sit there and do a blog necessarily themselves.</li> <li>• There was an event to teach grant writing... They had one on one meetings where they look at your piece with someone who had been in that grant space...and then you wrote your grant and someone edited with you, then you submitted your grant and you pitched your grant.</li> </ul>
<b>Dedicate funds</b>	<ul style="list-style-type: none"> <li>• A funder that differentiates between large-scale nonprofits and smaller scale. Because the small-scale nonprofits... can't compete. We're in the trenches.</li> <li>• I do feel that if there are additional opportunities in making sure that that information gets in the hands of that population or that group of nonprofits...smaller grants that could do so much more.</li> <li>• It would be nice if there were a formal way that was competitive but not as competitive. Those are just going to increase the network of bi3 and all the grantees, having some smaller pocket eligibility.</li> </ul>
<b>Give flexibly</b>	<ul style="list-style-type: none"> <li>• They have a separate pool of money for a BIPOC capacity building grant. Different rules, very flexible. And there were no requirements that you have to work with our organization but spreading out the introduction and giving these small organizations the capacity to sit at the same table as us...I think being able to give flexibility.</li> </ul>
<b>Keep it simple</b>	<ul style="list-style-type: none"> <li>• Being really mindful of community members...and people will say do you have a grant writer?... Grant writers are expensive. But... bi3's writing is clear. Here is the question, answer it. Here is the question, answer it. You have all the answers if you have a grasp on your job.</li> </ul>

#### 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 level of genuine community representation**. One related comment is to "get direct feedback" from the community about the impact of bi3 grantees' collective action.

An immediate suggestion (from the external evaluators) is to clearly explain if and when community **involvement in grant decisions occurs, and if it doesn't, to ideate ways that voice can be incorporated to make progress on the fundamental goal of shifting power**.

<b>Include community representation on the board</b>	<ul style="list-style-type: none"> <li>• I wonder if there is a place for community voice in decision making on their board.</li> <li>• It's spending a lot of time and you could be more innovative if you had people on the board that understood closer to the issue and there is nothing stopping you.</li> <li>• Your board, what is the role? What is their experience that you are looking for? There is an opportunity to make sure that community is represented some type of way. Specifically, the community of people being served through the work, and being clear about who that community is.</li> </ul>
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**Obtain direct feedback from community members**

- Ask [those closest to the issue]. It's always the best answer. Do you feel like we are doing a good job? Are these organizations that I am giving money to treating you properly?... Check with the people. That shouldn't be on [grantees] either.

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

A smaller subset of quotes focuses on how information on **the "why" behind a rejection** would be helpful, given that even LOIs require an investment of time and resources. As one person stated, "I literally spent so much time writing an LOI, and it was a lot of work, and then to find out I wasn't even considered."

That said, data party dialogue revealed while the desire to "give feedback is always there" for bi3, capacity limits make it difficult to do so "in a way that is constructive and helpful" to large amounts of applicants. With this in mind, recommendations crafted through the focus groups and data party are:

- **Stating upfront when feedback can be expected**, such as at a certain point in the review process (Note: bi3 currently is committed to providing feedback around declinations in the final rounds of decisions)
- **Noting the amount of funds available** in each funding opportunity along with grant ceilings

**Give feedback**

- I like the organizations that, when you don't get accepted, they go into a bit around what you could have done or say next time you can think about that.

**Offer context**

- [Fundors] only have so much money. Maybe your application is really good, but the pot of money doesn't extend. So having a conversation to share that it's actually really good but there is just no money, it's helpful.
- Just being honest about how much money there is...super helpful. We have all written proposals thinking there was one number on the table and then they come back with 10% of that.

**6 Provide operational and sustained funding**

The next gathering of quotes centers on how organizations desire (need) **funding to sustain working programs** rather than innovate new programs. From these quotes, the data party produced the following suggestions, which will require some structural changes:

- **Adding a category of grant award for next phase of funding** for innovating programs, or a continuum that might look like planning, start up to scale, to expansion
- **Giving more flexibility within innovation grants**, such as indirect costs and building in more operating funds

An additional, less formal suggestion is to explore a more expansive definition of "transformative." Can, for instance, a program be "transformative" without being new? Once this is codified internally, clearly spell it out in public-facing communications.

<b>Connect to other funders</b>	<ul style="list-style-type: none"> <li>I am still stuck on extended funding. You know this is a two-year project that is going well. You have two more in you. Who do you know in your network that can help sustain this?</li> </ul>
<b>Define terms</b>	<ul style="list-style-type: none"> <li>Those two words (innovative and transformative from the RFP). I mean if we had to point to that and say what does that mean, do we fit, are we transformative enough?</li> </ul>
<b>Fund what's needed</b>	<ul style="list-style-type: none"> <li>Someone who wants to know what exactly goes into the work... Someone who doesn't say, 'We only fund [this], or we don't fund salaries, we don't fund indirect expenses.'</li> </ul>
<b>Fund what's working</b>	<ul style="list-style-type: none"> <li>It is not only bi3, it's other funders...We just need to keep doing our work, you know... We can't afford at the moment to be transformational, and after a couple years the grant expires and then what?</li> <li>It's only 'innovate'...but...I really need to do what I am doing...the last grant had me innovate, and now I have something fresh. I need to nurture it. That's the hardest type of funding to get, general operating and you're doing good work, keep it going.</li> </ul>

## 7 Continue connecting & sharing out

Our second cycle analysis, performed after the data party, revealed additional recommendations that were intertwined with other statements. For these recommendations, the data suggest that bi3 already does these things and that respondents want to see them do more.

### Do more: connect grantees with each other and other funders

As shown here, grantee respondents value that bi3 facilitates thoughtful linkages amongst funders and other organizations, and respondents would like this to occur more.

<b>Connect peers for learning and collaboration</b>	<ul style="list-style-type: none"> <li>Bringing together grantees is really important. We all do different things...you are competing for who you are serving...but they have been transparent... They will say, 'We know this advocacy organization is doing this, can you tell me how you are different or how you are working with them...How can we create something around shared priorities, something local?'</li> <li>Where people are successful in the equity work, share it more. Why are we reinventing the wheel if they are already doing it well at your place?</li> </ul>
<b>Connect to funders</b>	<ul style="list-style-type: none"> <li>If we put together a great proposal and if you think someone else would like to fund that, please share it.</li> <li>I am still stuck on extended funding...Who do you know in your network that can help sustain this?</li> </ul>
<b>Connect to information (to learn about funding)</b>	<ul style="list-style-type: none"> <li>For a funder of bi3's magnitude, I was wondering if they are aware of other national connections of funders that maybe they can forward or let us know? Because with big national funders, you never know if there was a fit or whatever, and they probably know better than us.</li> </ul>

<b>Connect to policymakers</b>	<ul style="list-style-type: none"> <li>• We want to be able to be the extended arm from the funder to the statehouse. How can anybody in this room translate that out to your policy makers, where your full-time job is here running this amazing program and working directly with folks?</li> </ul>
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**Do more: sharing good news**

Given the tight community bi3 helps to knit, the data make it evident: in addition to wanting to connect with each other, respondents also want to celebrate each other's successes. Here we see an appreciation for when bi3 shares out success stories, which has ripple effects, especially for smaller organizations, and a desire to learn more about other's successful programs more substantively.

<b>Share back</b>	<ul style="list-style-type: none"> <li>• Did the actual work, work? And if it did, can you share it back? Not just to leaders but also to communities. So they can choose who they want to be existing with or give their money to with that information.</li> </ul>
<b>Share out</b>	<ul style="list-style-type: none"> <li>• I have a small organization and they have been helping us, they promoted us through social media. So they've been sharing a lot of our content, like when they see we've won an award or something, they're the first ones to share, like 'Congratulations to our partner!'</li> <li>• Several years ago... We presented to each other, and then the community came by. We came, we showed up, we got to walk around and see what other people were doing.</li> </ul>



# TBP Anchors

One of the primary goals of the focus groups was to gather grantee feedback to better leverage a Trust-Based Philanthropy approach. To probe into this line of inquiry, bi3 and Data Shine framed our co-created protocol using [The 6 Grantmaking Practices of Trust-Based Philanthropy](#) published by the Trust-Based Philanthropy Project (TBPP).

To then anchor our interpretation to and frame our findings with trust-based practices, we turned to TBPP's [The 6 Grantmaking Practices of Trust-Based Philanthropy](#) as a resource. As shown, the focus group data signaled that bi3 aligns with most TBP practices.<sup>1</sup>

## Give Multi-Year Unrestricted Funding



*Step 1. Make commitments for more than one year*

While bi3 provides multi-year funding (as witnessed in its multi-grantee focus group), a strand in the data is the grantee need to sustain "the work we already do" rather than being pushed to continually innovate and transform. Whereas some voiced a direct call to bi3 to provide more multi-year and unrestricted funding, others saw it as an opportunity for bi3 to expand their current practice of making warm connections to other funders for current and former grantees.



*Step 2. Trust that nonprofits know best how to spend grant money*

Through its well-documented trust in grantees as the experts, bi3 has demonstrated serious commitment to this step as witnessed in bi3 empowering grantees to make quick shifts without requiring lengthy or

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<sup>1</sup> Six areas embedded within the six practices were outside of the scope of this evaluation and may benefit from additional data collection and data/document review to shed light on internal decision making and processes (e.g., staff or board interviews, analysis of grantee composition): 1) Examine who receives multi-year unrestricted support, who doesn't, and what blind spots and biases exist in your processes, 2) Use available public records to understand prospective grantees, 3) Give grantees ample notice if you are making any changes that will affect their funding, 4) Be open and honest about your own organizational struggles, questions, and thought processes, 5) Make this offer of support clear, equitable, and optional, and 6) Inform grantees on how their input was used (or not) to inform your decision(s), and why.



onerous justifications, providing flexible project and reporting timelines, and issuing "commonsense" reporting and financial oversight requirements.

## Do the Homework



### *Step 1. Reduce pre-proposal requirements for grant applicants*

Here we find bi3's acceptance of (and even encouragement for) alternative application formats such as unstructured LOIs, oral pitches, and even proposals written for other funders were highly valued among participants. Additionally, bi3 helps take the guesswork out of the process, saving people time and resources by being clear about fit early and iterating concepts to ensure success. To further ease the burden, a strong suggestion was to offer feedback on declinations and clarify terms and requirements.



### *Step 3. Look beyond your usual circles to identify organizations...that may be overlooked due to implicit bias.*

As discussed, respondents called for more systematic outreach to small organizations while recognizing bi3's capacity constraints. Resulting recommendations included:

- Creating smaller, lower burden, and targeted grants for small organizations,
- Asking current partners who they would fund to widen the circle, and
- Training on grant writing for small organizations.



### *Step 4. Revisit your grantmaking criteria to understand how it may be giving preference to more established or well-funded organizations*

There is a strong current in the data that indicates a need to fully operationalize certain terms (that communicate criteria) to enable those with less bi3 history and less capacity to write grants to be confident in their interpretation of the "magic sauce" and, therefore, their eligibility.

## Simplify & Streamline Paperwork

The three steps TBPP outlines to progress this practice were represented in respondent statements. And while our inquiry does not paint a picture of the depth, frequency, or extent of use, **comments underscore that bi3 has adopted these practices**, and respondents appreciate them for being straightforward.

With the need to define key terms to clearly communicate eligibility requirements outlined above, a thread uncovered was that, while a "conversational approach" is appreciated, some desired structure to be built (and communicated) around their frequency and format.



### *Step 1. Accept proposals and reports written for other funders*



### *Step 2. Before inviting a full proposal, use a screening process that can help determine whether funding is likely*



### *Step 3. Consider taking a conversational approach to learning about grantees' work via phone calls, video calls, or in-person meetings*

## Be Transparent & Responsive

The focus groups revealed the many ways that **bi3 is both accessible and provides access to its network of current and former grantees**. For instance, regarding Step 1., though some definitional confusion exists, there is agreement that bi3 helps applicants determine whether they should invest the time and resources to apply for funding based on the fit of their concept. There is also the recurrent thread that bi3 expects "not everything will go as planned" and is available to think through program pivots (Step 4). Data also coalesce around bi3's responsiveness and openness, often positioned against the polarity experienced in other funder relationships (Step 4. and 5.).



*Step 1. Be clear upfront about what you do and don't fund, and let potential applicants know if meeting is not a good use of their time*



*Step 4. Invite grantees to share their own challenges*



*Step 5. Be responsive to grantees' emails and calls, and be particularly mindful of perpetuating trauma for BIPOC leaders, youth, and others who might feel disregarded or overlooked by other funders*

## Solicit & Act on Feedback

The act of hosting the focus groups was, in its very nature, the implementation of this trust-based practice, and, most often, whether the steps were taken is interpreted through the lens of our experience in the focus groups. By hiring an external firm and articulating the clear need for respondents to feel comfortable and that their identity would be protected 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. We also heard participants allude to the grantee focus groups as a unique opportunity. One person noted that the offer to provide feedback should be extended to community residents and beneficiaries to gauge how well people are being served by bi3 funding.



*Step 1. Anonymously survey grantees about your practices as a funder*  
Short surveys were deployed to participants who could not attend the focus groups. The former provided a high-level look at the general tenor of grantee perceptions about bi3; the latter provided complementary data to the focus groups. These surveys, however, did not represent a census of bi3's grantee population and were designed to supplement the main focus groups.



*Step 2. Before making major changes or updates, glean grantee feedback to inform those changes*  
Simply stated, this step gets at the core purpose of the focus group.



*Step 4. Compensate grantees for their time when your feedback requests require a significant amount of time outside of their usual work*  
bi3 thanked and provided compensation to those grantees who attended focus groups.

## Support Beyond the Check

Various acts of support beyond the check were revealed through focus group data, along with subsequent value conferred.



*Step 1. Listen to your grantee partners for any needs, challenges, or opportunities that you might be able to respond to with support*

A prominent strand underscores respondent appreciation for bi3 as a partner in thought and implementation, including providing guidance to adjust proposals and programming as needed.



*Step 2. Introduce grantees to other funders and like-minded organizations and emphasize to those funders what you've learned from these organizations*

Respondents provided concrete examples of how bi3 helps nurture connective tissues amongst its network, including how bi3 thoughtfully connects grantees to each other and relevant funding opportunities.



*Step 3. Highlight grantees' work in your newsletter, on your website, on webinars, and/or during conference presentations*

A steady stream of responses recapped how bi3 leverages its own media networks to amplify grantee organization's work, including sharing content on social media, facilitating connections to local news stations, and communicating with those organizations being funded. Respondents, in fact, would like bi3 to deepen this aspect of the practice by sharing more about what works for grantees (share back) and celebrating publicly their important work (share out).



# Conclusion

Evidence from grantee focus groups suggests that bi3 does a lot of things right. First and foremost, **bi3 is characterized by its collaborative approach to grantmaking.** For instance, the staff are thought partners from ideation to implementation and put their faith in grantees as "experts," allowing them to pivot in real-time without a lot of burdensome justification that pivots were required nor an extensive paper trail that the pivots happened. Relatedly, the data indicate, provides space for grantees to recalibrate programs, policies, and procedures based on implementation experiences, context shifts, and the foundational recognition that "not everything will go as planned."

Rounding out the data on bi3's cooperative nature, an undercurrent is that **bi3 intentionally nurtures connective tissues amongst its network**, including grantee-to-grantee and grantee-to-funder linkages. Another thread that comes through – noted to be "unusual" – is that bi3's relational approach to **grantmaking 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 partner, and continues to proactively make thoughtful connections to opportunities. **Furthermore, bi3 stays true to essential components of its mission by allowing grantees to "safely test innovation;" keeping health and racial equity at the center through sustained commitment, making decisions that manifest these values; clear and consistent messaging; and respecting that outcomes, especially systems-level outcomes, take time.**

Overall, the body of data collected emits the resounding theme that bi3 occupies a unique space as a funder for its grantees, both current and former, in which **it lives out an authentic relational approach to grantmaking that is grounded in trust, intentionality, and a genuine desire to see grantees succeed.**

That said, opportunities for improvement were mentioned in the focus groups. Through a participatory analysis session (aka data party) and our second cycle coding, seven actionable ideas were produced for bi3 to consider strengthening its grantmaking practices, including how it anchors to trust-based philanthropy. Shown below, these recommendations can offer substantive implications on bi3's ability to deepen its trust-based approach through both incremental operational changes (e.g., fine-tuning the check in processes) to more considerable adjustments to funding policies and funding

streams (e.g., creating a new, more flexible fund for smaller organizations, building in more operating funds into multi-year grants).

- 1** Be flexible & adaptive with grant check-ins
- 2** Clearly communicate bi3's goals, definitions, & requirements for funding
- 3** Expand bi3's relationships with, and opportunities for, smaller, community-based organizations
- 4** Incorporate community voice into decision making
- 5** Provide feedback to applicants, particularly when grant applications are declined
- 6** Provide operational and sustained funding
- 7** Continue connecting & sharing out

# Appendix

**Table 1. Actionable Ideas for Improvement | prioritization by impact + effort as categorized during the data party/participatory analysis session**

Actionable ideas for improvement mentioned by focus group respondents were analyzed in a group analysis session (also known as a data party) to increase the relevance, credibility, and uptake quotient of our data-based recommendations. To facilitate this activity, we used a magic quadrant exercise to weigh impact and effort ratio of each actionable idea for improvement. The results of this conversation, plus our second cycle coding, are displayed below.

 <p><b>High impact &amp; low effort</b> Do these!</p> <ul style="list-style-type: none"><li>• Add a category of grant award—what is the next phase of funding for innovating program—that is a continuum (planning, start up to scale, to expansion)</li><li>• Ask for continuous feedback e.g., "Is this still working for you?" (re: meetings, report frequency)</li></ul>	<p><b>High impact &amp; high effort</b> Weigh the cost/benefits</p>  <ul style="list-style-type: none"><li>• Build in additional flexible, general operating money into larger innovation grants</li><li>• Clarify communications requirements</li><li>• Create smaller, low burden, targeted grant structure for small organizations</li><li>• Give more flexibility within innovation grants-indirect costs/line-item and build more operating funds</li><li>• Improve definition communication/ requirement communications (website, app materials...)</li><li>• Support peer coaching opportunities but keep in mind lift on grantees (e.g., a proposal workshop led by a grantee)</li></ul>
 <p><b>Low impact &amp; low effort</b> Weigh the cost/benefits</p> <ul style="list-style-type: none"><li>• Ask current partners who they would fund in our strategic areas to identify potential partners</li><li>• Be clear when feedback is possible. (Note, the desire to give back is always there, but capacity issues are always there, too.)</li><li>• Be upfront with how much money you have in an RFP</li><li>• Change wording on website and other low impact things that facilitate the process</li><li>• Clarify decision making processes &amp; requirements</li><li>• Clarify TriHealth partnership requirement</li><li>• Define "transformational" and "innovative"</li></ul>	 <p><b>Low impact &amp; high effort</b> Typically avoid these!</p> <ul style="list-style-type: none"><li>• Reach out to the "community at large" for feedback</li></ul>

## Focus Group Participation

	Multi-year focus group	Capacity building grant focus group	
<b>Participant Tracking</b>			
Invitees	12	<i>Initial</i>	13
		<i>Replacement</i>	6
No-shows	0		4
Final participants	9		5
<b>Invitation Tracking</b>			
bi3 initial announcement	1		1
Data Shine invite	3		2
bi3 follow-up	1		1

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