



Foundation of Greater Montréal

LEARNING REPORT

Implementation of trust-based philanthropy and
participatory grantmaking practices

COLLECTIVE FUND FOR SOCIAL EQUITY 2023

In support of organizations and initiatives assisting asylum seekers, refugees, or migrants without status, or with temporary or precarious status.

Context

The Collective Fund for Social Equity (CFSE) was created by the Foundation of Greater Montreal (FGM) in 2021, with the intention of addressing various issues rooted in social inequalities in order to advance justice, equity, diversity, and inclusion (JEDI) across the Greater Montreal area. Accordingly, the Foundation prioritizes organizations and initiatives working with historically marginalized populations. These populations include Black, Indigenous, and people of color (BIPOC), LGBTQ2S+ people, women and girls, as well as neurodivergent people, and those living with physical or intellectual limitations.

In accordance with the JEDI principles adopted by FGM, priority is also given, when possible, to organizations founded or led by people who themselves experience the realities and issues on which they aspire to intervene. The Foundation is also committed to facilitating access to organizations, initiatives, grassroots groups, or other organizations facing systemic barriers in obtaining funding, including organizations without operating funds, emerging groups, or those whose main activities are advocacy, human rights, or community organizing.

Furthermore, the core principles of trust-based philanthropy are now an integral part of how the CFSE operates, as well as the majority of other funds administered by FGM. The Foundation uses this approach with an emphasis on transparency, consultations with communities, community involvement in decision-making mechanisms, and the replacement of the traditional process of submitting projects via application forms with two-way conversations between FGM and organizations. The Foundation thereby focuses on developing relationships of trust based on reciprocity and cooperation.

Summary of the 2023 Edition of the Collective Fund for Social Equity

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At the beginning of 2023, the growth of anti-immigration rhetoric, as well as public debates around the closure of Roxham Road and the renegotiation of the Safe Third Country Agreement with the United States, combined with the underfunding of community organizations helping asylum seekers, prompted the Foundation to turn its attention to these populations.

During the winter and spring of 2023, FGM spent three months conducting individual consultations with nearly 20 community organizations, institutional partners, and advocacy groups in order to prioritize needs and find promising solutions to better support the milieu. These consultations also made it possible to set up a Participatory Advisory Committee which notably helped to determine:

- populations that should be prioritized by the Fund;
- the vocabulary to be used in the context of the Fund;
- funding priorities;
- sector oversights and issues generally overlooked by funders;
- how to support organizations;
- the organizations and networks to be contacted proactively.

Furthermore, the commitment of seven philanthropic partners made it possible to increase the Fund's total budget to \$3.8 million and provide support over three years (2024-2026). Six financial partners that were confirmed before the distribution of funds enabled support for 16 organizations, while an additional partner, confirmed a few months after the distribution of the initial funds, enabled support for 6 more organizations.

Thanks to these collective efforts, the Fund took its final form, providing support to organizations and initiatives working with asylum seekers, refugees, or migrants without status, or with temporary or precarious status, according to the following three streams:

1. administrative or legal support for individuals;
2. advocacy aimed at influencing public policies;
3. empowerment of individuals and groups in the concerned communities.

In the end, 153 organizations responded to the call for projects, 78 were selected by the FGM team to continue the process of applying for funding via an in-depth conversation, and 16 organizations were prioritized by the Participatory Advisory Committee for funding over 3 years. A few months later, and thanks to the support of an additional financial partner, 6 organizations highlighted by the Participative Advisory Committee also obtained funding.

Methodological Principles and Progress

Since 2021, the way in which the Foundation of Greater Montreal understands and applies the principles of trust-based philanthropy has evolved, leading it to see its role in a more holistic way, going beyond the distribution of grants alone. These reflections include:

- Consultation and involvement of target communities in the co-creation of fund parameters and in decisions concerning the allocation of funds.
- Streamline the administrative processes involved in applying for funding, and take proactive steps to facilitate access for organizations and initiatives that are distant from philanthropic networks.
- Individualized support for organizations, with an emphasis on developing reciprocal relationships.
- Synthesis and sharing of learnings and knowledge with philanthropic partners and other stakeholders.

Here is a comprehensive summary of the ways in which these principles were put into practice during the 2023 edition of the Collective Fund for Social Equity.

PHASE	OBJECTIVES	STAKEHOLDERS	KEY MILESTONES
Community Consultations	<ul style="list-style-type: none"> ✓ Gain a deeper understanding of the issues at stake and the ecosystems involved. ✓ Develop a common language. ✓ Develop relationships to bring together a Participatory Advisory Committee representative of the various communities and issues involved. ✓ Initiate the co-creation of the Fund's parameters. 	<ul style="list-style-type: none"> ✓ FGM Team ✓ FGM Community Engagement Committee (ref. FGM Strategic Distribution Framework) ✓ Institutional partners ✓ Community organizations, advocacy groups and activists ✓ Philanthropic actors 	<ul style="list-style-type: none"> ✓ Two-way conversations and summary of findings. ✓ Better understanding of issues and needs. ✓ Develop the mandate of the Participatory Advisory Committee ✓ Recruitment of members of the Participatory Advisory Committee.
Defining the Fund's parameters	<p>Create a fund that responds to the realities and concerns of front-line groups, prioritizing those who face systemic barriers to obtaining funding.</p>	<ul style="list-style-type: none"> ✓ Participatory Advisory Committee ✓ FGM Team 	<p>Identification of priority parameters to be considered :</p> <ul style="list-style-type: none"> ✓ Priority populations ✓ Financing focus and more precise orientations ✓ Financing conditions (amounts, multi-year period)

PHASE	OBJECTIVES	STAKEHOLDERS	KEY MILESTONES
Developing tools	<ul style="list-style-type: none"> ✓ Simplify access to the Fund through easy-to-use tools and processes, and transparency. 	<ul style="list-style-type: none"> ✓ FGM Team ✓ Participatory Advisory Committee 	<ul style="list-style-type: none"> ✓ Creation of tools (forms and analysis grids) respecting the parameters defined by the Participatory Advisory Committee. ✓ Sharing tools via the website.
Call for projects via the pre-qualification form	<p>Simplify and democratize access to the call for projects:</p> <ul style="list-style-type: none"> ✓ Extended period for call for projects. ✓ Information accessibility (use of language, accessible communications). ✓ Simplified pre-qualification form. ✓ Availability of the FGM Team. ✓ Targeted and proactive approaches to invite organizations to submit a project. 	<ul style="list-style-type: none"> ✓ FGM Team ✓ FGM community partners (for information dissemination and transmission) 	<ul style="list-style-type: none"> ✓ Sharing the fund's objectives and criteria via social media and website posts. ✓ Organization of "open house" meetings on Zoom. ✓ Targeted invitations to eligible organizations to complete the pre-qualification form. ✓ 153 pre-qualification forms received.
Selection of initiatives to prioritize	<p>Identification of organizations and initiatives that best meet the Fund's priorities, geographical representation, and populations identified as being the most vulnerable, all while respecting the capacity limits of the FGM team and the advisory committee.</p>	<ul style="list-style-type: none"> ✓ FGM Team 	<ul style="list-style-type: none"> ✓ Selection of organizations based on the information provided in the pre-qualification form. ✓ Quick communication with organizations that were not selected at this first stage.
In-depth conversations with pre-selected organizations and writing of funding applications	<ul style="list-style-type: none"> ✓ Reduce the administrative pressure of preparing a funding application for organizations. 	<ul style="list-style-type: none"> ✓ FGM Team ✓ Organizations, groups and initiatives 	<ul style="list-style-type: none"> ✓ Development of a conversation guide to standardize the questions asked.

PHASE	OBJECTIVES	STAKEHOLDERS	KEY MILESTONES
	<ul style="list-style-type: none"> ✓ Level the playing field for organizations with little or no experience of writing funding applications. ✓ Emphasize a relational and human approach. 		<ul style="list-style-type: none"> ✓ 78 in-depth conversations between the selected organizations and members of the FGM team. ✓ Drafting of conversation forms (funding requests) by the FGM team. ✓ Final approval of forms by organizations before submission to the advisory committee.
<p>Participatory Distribution (reading, assessment of initiatives and funding recommendations by the Participatory Advisory Committee)</p>	<ul style="list-style-type: none"> ✓ Share decision-making power with the people directly involved in the issues. ✓ Promote community expertise in order to make financing decisions that will strengthen the entire ecosystem. ✓ Promote an intersectional approach by combining several perspectives and viewpoints in a collective knowledge process. 	<ul style="list-style-type: none"> ✓ FGM Team ✓ Participatory Advisory Committee ✓ FGM Community Engagement Committee 	<ul style="list-style-type: none"> ✓ Adoption of the principles of trust-based philanthropy and the Fund's analytical tools by the committee. ✓ Establishment of mechanisms for managing conflicts of interest. ✓ Shared understanding of analysis criteria. ✓ Individual reading and assessment of the files assigned to each committee member. ✓ Summary of individual analyses of committee members by the FGM team. ✓ 1 exchange and get-to-know-each-other meeting by members of the committee. ✓ 3 discussion and prioritization meetings. ✓ 1 final decision-making meeting leading to the selection of 16 initiatives to be financed. ✓ Approval of funding recommendations by the FGM Community Engagement Committee.

PHASE	OBJECTIVES	STAKEHOLDERS	KEY MILESTONES
Communication of results and two-way feedback	<ul style="list-style-type: none"> ✓ Maintain relations with all the organizations met through the Fund. Humanize the experience ✓ (for organizations receiving support, or not). 	<ul style="list-style-type: none"> ✓ FGM Team ✓ Organizations, groups and initiatives 	<ul style="list-style-type: none"> ✓ Communication of results (positive or not) as well as personalized feedback to each organization that participated in the conversations ✓ Publication of results on the FGM website as well as in the newsletter and social media. ✓ Publication of the list of organizations that were met, a brief description of the initiative discussed, and the amount granted for the organizations supported.
Synthesis and sharing lessons learned	<ul style="list-style-type: none"> ✓ Learn from our experiences, with a view to continuously improving our approach. ✓ Share what we've learned to advance equitable and relational philanthropic practices in our communities. 	<ul style="list-style-type: none"> ✓ FGM Team ✓ Philanthropic partners 	<ul style="list-style-type: none"> ✓ Process experience survey shared with applicant organizations and Participatory Advisory Committee members ✓ Summary of what we've learned by the FGM Team. ✓ Knowledge-sharing by the FGM Team via webinars, panels, working groups, etc.
In-depth relationships and support beyond financing	<ul style="list-style-type: none"> ✓ Ensure that the FGM is more than just a funder. The FGM aims to develop relationships of trust with the organizations operating in Greater Montreal. 	<ul style="list-style-type: none"> ✓ FGM Team ✓ Organizations, groups and initiatives 	<ul style="list-style-type: none"> ✓ Share information on the organizations and initiatives who submitted applications with other funders who have shown an interest in the same topic. ✓ Co-creation of a support model with Fund recipient organizations

Methods Tested and Lessons Learned

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1. Listening to communities

What we did

In spring 2023, the FGM team organized nearly **20 conversations with organizations, institutions and individuals involved in defending the rights of immigrants, refugees, and asylum seekers, and front-line services for these populations.** These conversations made it possible to formulate the initial guidelines for the Fund, which were subsequently validated and developed by the Participatory Advisory Committee.

The team **complemented these conversations by reading and gathering publicly available information** on the immigration situation and immigrant rights issues in the Canadian and Quebec context. These topics were widely covered by the media in the spring of 2023, following the closure of Roxham Road and the renegotiation of the Safe Third Country agreement with the United States.

Following these conversations, FGM brought together all participants so that the priorities shared individually could be discussed as a group in order to identify funding areas to be prioritized within the framework of this Fund.

What we learned

Community consultations are essential to build trust and credibility. It is important to **dedicate sufficient time (ideally 2-3 months) and resources to this phase.**

This is a time when knowledge and understanding of targeted issues are evolving quickly. It is necessary to organize **an intentional knowledge-sharing process between the members of the community engagement team, but also with other FGM teams.** Knowledge can also be shared with potential partners at this stage.

It is important to have an open and proactive stance and to **reach out to organizations outside the usual network.** Most of the organizations approached for a consultation responded positively, and they also referred team members to other expert organizations, which helped diversify voices and broaden the circle of trust.

It is necessary to approach the community consultation phase with **clear intentions** (Why are we conducting consultations?), a common approach (What questions are we asking? What are we doing with the information collected? How are we going to share the knowledge?), and to develop **a list of contacts that covers several different locales, populations and types of organizations** in order to include as many diverse perspectives as possible.

- When should consultations begin? In the context of a fund that can cover a wide range of issues - from food security to mental health, from immigration to minority rights, and much more - is it better to start consultations with a blank slate, or with a clear focus on issues that are already targeted?
- How can we go about soliciting and including the expertise of those who do the work outside our network and whose voices we are not used to hearing?
- Is it necessary to include the contribution of frontline actors at the community consultation stage? If so, how can we facilitate their participation given the lack of time and resources in organizations?
- How can we facilitate and promote the participation of people with lived experience of the issues we wish to address?

2. Building trust through an adapted call for projects

What we did

- **Clearly communicate the Fund's parameters and strategies for reaching its targets:**
 - A short explanatory document (one pager) and a complete frame of reference were published on the FGM website, in French and English, and were also distributed through various networks.
 - 3 “open house” meetings on Zoom, where organizations could ask questions and obtain additional information about the Fund. In total, nearly 120 organizations attended these sessions.
- **Implement a proactive approach** to communicating information about the Fund with organizations, particularly those working with historically marginalized populations, those located off the Island of Montreal, and grassroots groups:

What we learned

- **Emphasis on message clarity:**
 - Before launching the call for projects, time and effort must be devoted to clarifying and specifying the fund's objectives and eligibility criteria, without making them too rigid.
 - It is also important to clarify the definition of certain terms that may be interpreted differently by committee members and the organizations. In particular, we have noticed that terms such as “empowerment”, “social transformation” or “intersectionality” can be interpreted in different ways, which can create confusion in the submission of applications as well as in their evaluation.
 - Similarly, many of the terms and concepts associated with trust-based philanthropy are relatively unfamiliar and need to be clearly explained.

- More than 60 targeted emails were sent to such organizations, in addition to publications on social media and in FGM newsletters and spreading the news through the FGM networks.
- These organizations came from the FGM database, as well as from referrals offered by Fund partners and members of the Participatory Advisory Committee. In addition, we searched media publications, immigrant rights campaign websites and membership lists of local and national umbrella organizations to find eligible organizations we didn't know about.
- **Simplify access to the Fund** through an online pre-qualification form:
 - **Develop a short, simple, and easy-to-use pre-qualification form.**
 - Establish guidelines that are consistent with the Fund's explanatory documents, enabling initiatives that have completed the pre-qualification form to be prioritized at the next stage.
 - Communicate with all organizations whose proposals were not selected, and provide individual feedback to all groups that requested it.
- Put in place intentional ways to **facilitate access to organizations with smaller organizational capacity** (without a charity number, without operating funding, in the emerging phase, grassroots groups, etc.):
 - As with other funds administered by FGM, no supporting documents (financial statements, annual reports, letters of recommendation, internal
- **A proactive, intentional approach** is needed to reach organizations in other networks or sectors. However, this approach doesn't guarantee that less-resourced actors will be able to respond to a call for projects.
- **Time is the crucial resource** that makes all the difference to the quality of the process, the well-being of the people involved, and the quality of the relationships to be developed. The notion of “sufficient time” depends on many variables, such as the size of the team, the number of organizations that have responded to the call for projects, and other internal or external projects and processes that require the team's involvement. Ideally, time should also be allowed for transition and reflection between stages.
- For the majority of organizations wishing to apply, the project submission process based on a relational approach, and where the majority of the work is carried out by the funder, was new and unusual. Some organizations were concerned about the loss of control over their application, or about the FGM's ability to fully understand their work. Others interpreted the time and effort devoted by the FGM team to their application as a guarantee of funding.
- It is important to **reassure and support organizations throughout the process, recognizing that reversing the traditional model of relations between a funder and organizations applying for funding can be destabilizing.**

regulations, or detailed budgets) were required, in order to level the playing field between organizations.

- **Promote the relational approach** and reduce administrative pressure on organizations:
 - Replace the process of writing a detailed funding request with in-depth conversations between team members and organizational representatives.
- **Be transparent** about the decision-making process:
 - Throughout the process, offer each organization an individual follow-up with a member of the FGM team.
 - Publication of the names of recipient and non-recipient organizations on the FGM website, along with a short description of their activities.

- A relational approach is crucial to building trust with organizations. However, this approach is associated with a **physical, intellectual, and emotional load carried by the team**. When planning the conversation and application period, it's important to allow time not only for quality work, but also for rest and emotional well-being. It is also important to create opportunities for exchange between team members, and to consider offering individual or group psycho-emotional support.

The questions we still ask ourselves

- A call for projects enables us to reach out to organizations beyond our network. However, it requires a significant investment of time and energy on the part of the team, particularly during the initial selection process. It's also a process that inevitably creates “winners” and “losers”. What context justifies the introduction of a call for projects? What are the alternatives?
- How can we reach out more to communities with which we have less contact, such as organizations located outside the Island of Montreal, or working with certain population groups that have historically been marginalized, or ignored by the philanthropic community?
- What additional measures can be put in place to ensure an equitable distribution of funds? For example, there could be funding envelopes reserved for specific regions or groups, or a separate funding stream for smaller organizations. How can we create favorable conditions for these organizations?

3. Sharing power through a participatory grantmaking process

What we did

- In the past, FGM has worked with participatory committees whose mandate was limited to evaluating submitted initiatives and formulating recommendations. For the 2023 edition of the CFSE, the Foundation has expanded the committee's mandate by applying the principles of participatory distribution in the following ways:
 - **Inviting contributions** to the definition of the Fund's parameters, including target populations, funding streams, funding levels, and evaluation criteria.
 - **Facilitating discussions and expertise sharing between the members of the committee for the benefit of the Fund:: identification of priority needs by sector, prioritization of submitted initiatives, understanding of the overall context, etc.**
 - **Final decision-making authority** delegated to the committee for the distribution of grants, in accordance with FGM's [Granting Strategy](#).
- **Recruitment and committee composition:**
 - The first committee was composed of around twenty people representing various organizations (community and public sector). FGM was also represented by 4 members of the

What we learned

- It is important to **recognize the tension that can exist between the principles of trust-based philanthropy and participatory grantmaking.** While some committee members were completely at ease with the streamlined call for projects processes (such as not requiring supporting documents or detailed budgets or taking into consideration very small or emerging organizations), for others the learning curve was more pronounced. As the process progressed, committee members became increasingly comfortable with the approach but, being aware of this learning curve, particular effort must be put into training and preparing committee members for their mandate.
- It is important to **define clear leadership through the participatory process.** In this edition of the Fund, the FGM team took on a supporting role in the collective knowledge process, which initially caused confusion for some committee members who had expected the process to be more directly led by FGM. It is important to find a balance between sharing decision-making power and active participation, as the FGM team brings particular expertise and a holistic vision that can help advance thinking within the committee.

Community Engagement Committee, in accordance with its policies.

- Participation of representatives from underfunded geographic areas, as well as organizations working directly with historically marginalized populations.
- **Community organizations that participated in the Participatory Advisory Committee had the opportunity to submit an application to the Fund.**
- **Some members of the committee chose not to participate in the evaluation phase due to possible conflicts of interest and stepped down after giving their suggestions on the priorities and overall make-up of the Fund.**
- **Participatory Distribution Committee:**
 - **Committee formed of diverse representatives from the first advisory committee**
 - Implementation of **mechanisms for managing conflicts of interest**, including a code of ethics and a process for disclosure and recusal of concerned members at the time of discussions on applications where a conflict of interest has been declared.

The work of the Participatory Advisory Committee took the form of five half-day meetings. In addition to the meetings, the mandate required time for preparation, reading and individual analysis of funding applications.

- With a participatory process that includes a diversity of stakeholders, **it can't be expected that everyone will be present at all times**. A multitude of factors affected the participation of committee members, including the onset of the humanitarian crisis in Gaza, public sector strikes, as well as personal circumstances such as illness, exams, etc. When planning a participatory process, it is important to keep in mind that real-time participation will be affected by a variety of factors outside of our control.
- **The participation of representatives from community organizations serving the populations targeted by the Fund** is essential, in order to develop a truly inclusive distribution process based on the expertise of front-line individuals. At the same time, this creates a risk of conflicts of interest. The goal is to both maximize participation and the sharing of expertise among members, while remaining attentive to the emotional comfort of these individuals and other committee members. Proactive actions, such as allowing people to leave discussions, and individual follow-ups after meetings, proved essential to preserve the cohesion of the committee.

The questions we still ask ourselves

- What should be the role of the granting foundation in the participatory distribution process? How can decision-making power be shared while ensuring constructive leadership of the process?
- How to ensure optimal participation of committee members throughout the process?
- How can we ensure a balanced decision-making process in a participatory committee where 50% or more of the members represent the organizations that submitted funding requests?

4. Offering support beyond financing - Accompaniment

By drawing on the principles of trust-based philanthropy, the grant distribution process can be seen not as an end in itself, but as a means for developing lasting, reciprocal relationships with a wide-range of community organizations and non-traditional actors.. Through this approach, it is possible to offer support, feedback, information about other funding opportunities, and, as much as possible, connections with other funders.

Over the years, the organizations FGM meets through these calls for projects will be called upon to become its partners and collaborators in the development and implementation of future editions or potential new funds, thus contributing to a generative cycle of relational philanthropy.

What we did

- Information on all the organizations and initiatives considered under the Fund was compiled and made public, and may also be shared in a more targeted way with other funders concerned by the same issues.
- The FGM team continuously monitors funding opportunities created by other foundations or institutional partners in order to pass this information on to organizations that could benefit.
- A process of co-creation of a model of support and mutual accountability with Fund recipients will be developed. In parallel, the team is considering the possibility of supporting the capacity building of organizations financed and not financed by the Fund.

The questions we still ask ourselves

- How can we offer support and deepen the relationships we've built with organizations that have not received funding from the Fund?
- How can we strike the right balance between support, accountability, capacity-building, and mutual learning, without duplicating what already exists or putting additional pressure on organizations?
- How can we develop a support plan that meets the needs of organizations with different capacities and priorities?

Conclusion

To date, trust-based philanthropy and participatory grantmaking are still emerging philanthropic practices and it is necessary to recognize that their application heavily depends on the context and organizational constraints of each organization. Thanks to the support and confidence of our philanthropic partners, and the openness to innovation of the organizational leadership, FGM has been able to experiment, learn, and find ways of doing things that are in line with our organizational and personal values.

The Collective Fund for Social Equity has enabled our foundation to develop and deepen our relationships with philanthropic, institutional, and community milieus, including emerging organizations actively engaged with historically marginalized populations. It has also enabled us to **advance our efforts in the areas of justice, equity, diversity and inclusion**, for example, by involving community representatives in the fund distribution process, by granting multi-year and unrestricted funding, and by offering support beyond this funding.

These philanthropic approaches require a considerable investment in terms of time, effort, and empathy. When planning a fund based on these approaches, it is important to recognize the limitations of the team and the partners involved, to allow sufficient time for the various processes, and to provide emotional support for team members and members of the Participatory Advisory Committee who express the need. **As with any process based on aspirations and values, it is important to find the balance between what we want to achieve and what we can do with the resources available.**

Finally, FGM's journey with the Collective Fund for Social Equity doesn't end with the distribution of grants. By 2026, the FGM team intends to co-create models of support and reciprocal accountability with beneficiary organizations, to seek ways to support non-funded organizations, and to continue to collaborate with other foundations and institutions concerned with the issues affecting the populations identified for the purposes of the CFSE.

As part of the Collective Fund for Social Equity, the FGM team was able to dialogue with many people passionate about innovative practices that aim to democratize philanthropy and rethink power dynamics between community organizations and their funders. Through this report, the Foundation of Greater Montreal aims to contribute to this dialogue, and to offer a vision and tools to those who wish to apply them in their philanthropic work. That's why FGM also offers a toolbox (*coming soon*) with some examples and templates of the tools we used throughout the process.

Annex 1: Timeline

Early 2023

Choice of the theme for the Collective Fund for Social Equity 2023.

**April – July
2023**

Consultations with front-line organizations, institutions and advocacy groups to better target the Fund's issues and objectives.

**February –
October 2023**

Consultations with philanthropic foundations that have expressed interest in the theme or approaches deployed within the framework of the Fund.

**June – August
2023**

Creation of the mandate of the Participatory Advisory Committee and recruitment of members.

**July 20,
2023**

First meeting of the Participatory Advisory Committee to define the target populations, the financing streams, the financing conditions, and the criteria of the Fund.

**July – August
2023**

Creation of a frame of reference based on the recommendations of the advisory committee. Creation of tools: pre-qualification form, conversation form (funding application), application analysis grid.

**August 7 –
September
29, 2023**

Call for projects, receipt of applications via a simplified pre-qualification form.

**August –
September
2023**

Three Zoom open-house sessions for organizations.

**September 18
– October 5,
2023**

Selection of organizations for in-depth conversations via pre-qualification forms.

**September –
November
2023**

In-depth individual conversations with 78 organizations and preparation of funding applications by the FGM team.

**October 13,
2023**

Preparatory meeting of the Participatory Advisory Committee to clarify the use of tools and decision-making processes.

**October 26 –
November 17,
2023**

Application analysis stage: analysis of forms by committee members and three group discussion/appraisal meetings.

**November 22,
2023**

Final meeting of the Participatory Advisory Committee - formulation of distribution recommendations.

**November 30,
2023**

Approval of recommendations by the FGM Community Engagement Committee.

**December 4-
10, 2023**

Communication of results to organizations.

**December
2023 –
January 2024**

Feedback with organizations that participated in the Fund. Feedback survey regarding FGM practices among members of the advisory committee and organizations. Team reflection on experience, successes and lessons learned.

January 2024

Summarize and share methods tested and lessons learned in the context of the Fund. Share information on initiatives submitted to the Fund with other donors.

April 22, 2024

First meeting of the 2023 Fund's cohort of beneficiary organizations.

**March – July
2024**

Co-creation of the support model with beneficiary organizations.

Annex 2 : Highlights

153

Number of organizations responding to FGM's call for projects

78

Number of organizations selected for an in-depth conversation leading up to the submission of the funding request to the participatory advisory committee: 78, of which 31% were non-qualified donees, and a significant number did not have core funding and relied primarily or exclusively on volunteers to accomplish their mission

16

Number of organizations chosen by the participatory committee for funding: 16, of which 25% are non-qualified donees



Distribution of funds between funding streams:

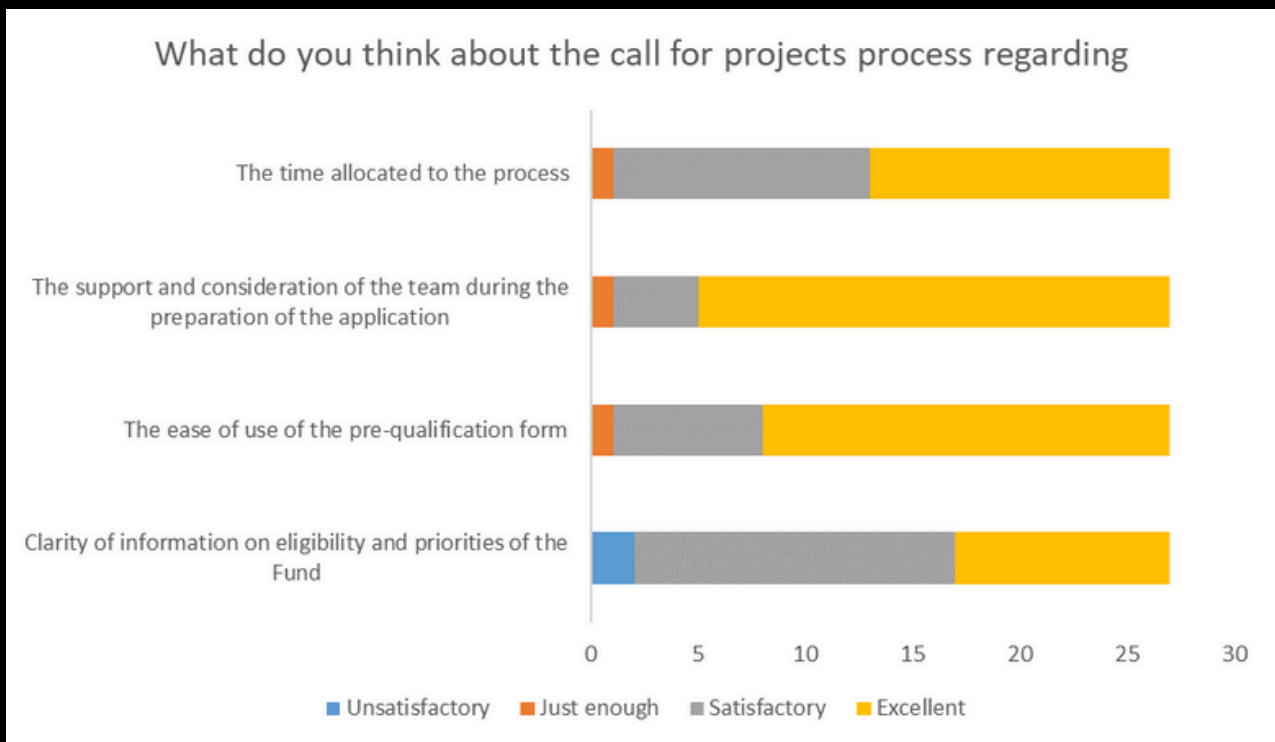
Legal and administrative support – 59% (9 initiatives),

Advocacy – 14% (2 initiatives),

Community empowerment – 26% (5 initiatives).

Annex 3 : Feedback From Organizations

In December 2023, FGM asked for feedback from organizations that had participated in the Fund's in-depth conversations phase. A total of 27 organizations responded to the survey, representing a third of the participating organizations. 65% of these organizations had not previously received funding from FGM. Below is an excerpt from the responses concerning organizations' perceptions of the trust-based philanthropy practices adopted by the Foundation:



In this process, to what extent do you think FGM has managed to



Beyond grant allocation, how can we support you in your mission?



How can we facilitate the involvement of communities in defining the issues and objectives of our funds?

