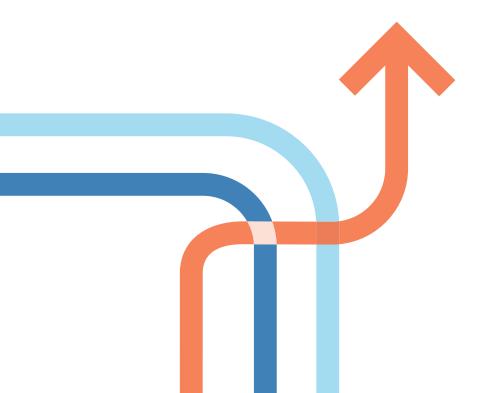


Statewide Equity Fund

A GUIDE FOR PHILANTHROPY ON PARTNERSHIPS
TO EQUITABLY SHAPE PUBLIC FUNDING

"The resources that philanthropy has are more than just dollars. It's networks, it's relationships and it's our responsibility to bring people around a table to solve problems alongside our community."

Melanca Clark
Co-chair - SEF Strategic Support Pilot Working Group





The Council of Michigan Foundations (CMF) leads, strengthens and supports Michigan philanthropy by emboldening and equipping CMF members in the relentless pursuit of equitable systems and inclusive diversity, fortifying the field through public policy action, fostering the growth of current and future philanthropy leaders and advancing exemplary philanthropic practices and field expertise.



The Statewide Equity Fund (SEF) is a CMF member-led pooled fund designed to test the theory of philanthropy's ability to help shape the influx of public dollars toward equity-centered approaches to advance economic prosperity in communities.



To learn more about the Statewide Equity Fund visit michiganfoundations.org/policy/statewide-equity-fund

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A Message from the Statewide **Equity Fund Co-Chairs**



Diana Sieger Co-Chair SEF Strategic Support Pilot **Working Group**

The Statewide Equity Fund is about reimagining philanthropy's role in driving systemic change. It's about building vital 'muscles' - fostering community trust, strengthening cross-sector partnerships and nurturing collaboration. By recognizing and harnessing the lived knowledge that communities hold about their own challenges and opportunities, we encouraged the five locations that participated in the pilot to build programs and partnerships that were authentic to their places and their needs.

This work is not solely about equitable fund distribution; it's sharing power and providing a table to ensure budgets meet their community's needs. It's not just about building partnerships; it's helping philanthropy realize its capacity to convene and advocate on behalf of its community. This work is meant to shift Michigan's philanthropic landscape, positioning foundations as not only funders but also as conveners, bridge builders and advocates.

Through the stories and successes of these five communities, we hope to inspire a broader movement towards more intentional, collaborative and transformative engagement between philanthropic organizations, communities and local governments.



Melanca Clark Co-Chair SEF Strategic Support Pilot **Working Group**

The words "intention" and "equity" are at the heart of the Statewide Equity Fund. The intention to bring community in, to hear their vision and apply the historic investments that were coming into their community to help work toward that vision. The intention to partner with local municipalities as they distributed these funds to ensure they were distributed with equity as a priority. And while those principles were at the heart of SEF, they centered around the convening power of philanthropy.

When philanthropy works at it's best, it brings all of its resources to the table networks, relationships, platforms and dollars to create more equitable communities. We were proud to watch each community tackle this challenge in their own unique way, but we were also proud to see the similarities. They all built new relationships to deepen their committment to equity. They all convened new partners to ensure more voices were a part of this conversation. And they all used their platform and relationships to ensure that equity remained at the center of this work.

This pilot helped reinforce that philanthropy has a major role in this work. We hope that the findings from this playbook help your community and your organization realize the full potential we all have to advance transformative change.

Statewide Equity Fund Strategic Support Pilot

The Statewide Equity Fund (SEF) launched as a \$2 million CMF member-driven pooled fund aimed at providing the infrastructure needed to help shape the incoming American Rescue Plan Act (ARPA) funds and other federal dollars toward equity-centered approaches.

The SEF Strategic Support Pilot was established in May 2021 to empower CMF members to strategically pool resources toward systemic change. Specifically, five sites were identified to participate in the Strategic Support Pilot. CMF members serving as regional collaborative leads have been working with local governments and community partners to help shape investments in their communities.

The SEF Strategic Support Pilot aims to not only more equitably distribute ARPA funds, but also highlight the important role of philanthropy in connecting stakeholders and advocating for fair and inclusive community-focused decision making. Through coalition building and technical assistance, the SEF is supporting local funders to guide investments and ensure those investments have a lasting, positive impact on the communities they are intended to serve.

How the SEF Provides Strategic Support:



Education + Information: Providing the regional collaboratives with information on state and local funding policy and expectations that equity be prioritized in allocation of ARPA funds.



Technical Assistance: Connecting regional collaboratives with technical assistance providers to develop effective, efficient, innovative and equitable approaches in the use of federal ARPA and state resources through the sharing of unique approaches and tools to help inform investments.



Peer-to-Peer Learning: Creating spaces for shared learning across regions with peer-to-peer exchange and connection to similar models underway across the country.



Innovation Funds: Seeding innovations that emerge from the pilot based on new and different ways philanthropy is working with community and government to shape equity conversations, and innovations that hold promise for accountability measures.

Organizations Participating in the SEF Pilot

Local efforts for this pilot were led by community foundations serving as regional collaboratives leads (RCL).

- Ann Arbor Area Community Foundation
- Community Foundation of Greater Flint
- Grand Rapids
 Community Foundation
- Community Foundation of Marquette County
- Pontiac Funders Collaborative
 Hosted by Community
 Foundation for Southeast
 Michigan

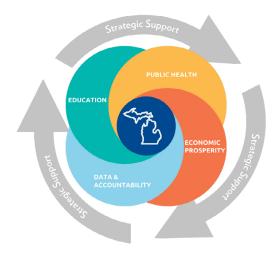


Background on the Statewide Equity Fund

In 2020, the Michigan Philanthropy COVID-19 Working Group, an ad hoc committee of 25 foundation leaders and partners was created and convened by CMF to focus on creating clear paths grounded in equity for Michigan's community of philanthropy to embark on together, helping to ensure philanthropy had solid strategies to address the challenges of the pandemic, present and future.

The Working Group developed the Building an Equitable Future Together policy framework, anchored by three policy domains: public health, education and economic prosperity.

In the spring of 2021, the group provided a final set of recommendations based on the framework, which included the creation of collaborative opportunities for philanthropy to engage in collective action strategies to address shortterm, intermediate and long-term inequities in Michigan further illuminated by the COVID-19 pandemic as well as the national reckoning for racial justice amplified across the country at that time.



Through the guidance of the Working Group and with approval of the Board of Trustees. CMF established a \$2 million pooled fund called the Statewide Equity Fund (SEF). Acting as a collaborative vehicle for Michigan philanthropy, the SEF helped to catalyze opportunities to address systemic challenges laid bare by the COVID-19 pandemic.

With a focus on economic prosperity, the pooled funds through the SEF were used for community engagement and technical assistance. Flexible funds were made available for project scale, innovations and unanticipated needs and opportunities to infuse equity in funding decision-making. CMF distributed funds to five community foundations. A cadre of technical assistance providers and an evaluation team were secured for sites to address broad shared needs and to capture learnings during the implementation of the pilot.

The SEF is part of CMF's long-term effort to advance its vision for a thriving philanthropic sector leading in the relentless pursuit of equitable systems and inclusive diversity.

With the massive influx of public dollars coming into communities through the Coronavirus Aid, Relief, and Economic Security (CARES) Act (2020) and ARPA, the SEF Strategic Support Pilot was developed to test the equitable distribution of those funds — in alignment with the federal administration's equity focus in the distribution of resources and implementation of plans for how the resources would be used.

The scale of this one-time investment through the CARES Act and ARPA funds allowed for this pilot to emerge while recognizing that public funds will always be greater than philanthropic investments. Therefore, this type of publicprivate partnership is crucial for the equitable distribution of public funds in the future.

Further, this work is rooted in the understanding that philanthropy has a role beyond grantmaking. Philanthropy has exceptional convening power. For example, foundations have the opportunity to bring diverse groups of people together to identify shared goals, serving as a crucial partner to policymakers, municipalities and other community leaders.

Through the pilot, five regional collaborative sites, led by CMF members, are working closely with their local units of government to help shape investments toward equitable outcomes within the focus area of economic prosperity.

SEF Pilot Site Selection

The SEF Strategic Support Pilot regions were identified by examining the following criteria:

- Community need based on KidsCount, ALICE and census data, and Social Vulnerability Index data.
- Municipal leadership and community foundation readiness.
- Realistic opportunity to influence how ARPA local fiscal recovery resources are spent and/or hold government entities accountable to equitable outcomes.

The SEF Strategic Support Pilot focused on five communities: Ann Arbor, Flint, Grand Rapids, Marquette and Pontiac. The locations were chosen based on:

- Alignment with the innovation grant purpose bolstering the ability of philanthropy and its partners to shape public investments and outcomes.
- Commitment to community engagement engaging historically disinvested and underrepresented populations in public funding decision-making processes.
- Cultivation of municipal leadership strengthening ties with municipal leaders and helping to wield and share power to shape public funding priorities and decisions.
- Inclusive and feasible strategy that contributes to equitable outcomes - scaling promising practices and contributing to changes in public dollar allocation.
- Capacity to lead this work inclusively identified community foundations have time and enabling infrastructure to effectively and equitably guide and support the work and collaborate with partners.

Thank You to the **SEF Supporters:**

- Ballmer Group
- Charles Stewart Mott Foundation
- Community Foundation for Southeast Michigan
- DTE Energy Foundation
- Ford Foundation
- Grand Rapids Community Foundation
- The Hudson-Webber Foundation
- The Joyce Foundation
- The Kresge Foundation
- Ralph C. Wilson, Jr. Foundation
- The Skillman Foundation
- W.K. Kellogg Foundation

"We funded this SEF work with three goals: to ensure equity was at the heart of ARPA fund distribution; to ensure community participation in budgeting; and to build and deepen cross-sector partnerships with foundations and municipalities."

Wendy Lewis Jackson Managing Director, Detroit Programs The Kresge Foundation

Statewide Equity Fund **Working Group**

The implementation of the pilot has been informed by insights from the SEF Strategic Support Pilot Working Group, led by Diana Sieger, former president of the Grand Rapids Community Foundation and Melanca Clark, former president and CEO of the Hudson-Webber Foundation.

Co-Chairs

Melanca Clark | Hudson-Webber Foundation*

Diana Sieger | Grand Rapids Community Foundation*

Working Group Members

Karen Aldridge-Eason | Governor's Office of Foundation Liaison

Faye Alexander Nelson | W.K. Kellogg Foundation*

Carolyn Bloodworth | Consumers Energy Foundation*

Ryan Bowers | Activest, LLC*

Allison Brown | Arabella Advisors

Tim Daly | The Joyce Foundation

Lynette Dowler | DTE Energy Foundation*

David Egner | Ralph C. Wilson, Jr. Foundation

Zosia Eppensteiner | Community Foundation of Marguette County

Lynne Ferrell | Frey Foundation*

Linda Fowler | Regionerate LLC

Bonnie Gettys | Barry Community Foundation

Mike Goorhouse | The Community Foundation of the Holland/Zeeland Area*

Paul Hillegonds | Michigan Health Endowment Fund*

Wendy Lewis Jackson | The Kresge Foundation

George Jacobsen | Southeast Michigan Economic and Cultural Vitality, William Davidson Foundation

David "DJ" Jones | Petoskey-Harbor Springs Area Community Foundation

Josh Kirschenbaum | PolicyLink

Lauren Marra | Arabella Advisors

Greg Matthews | JFM Consulting Group

Darin McKeever | William Davidson Foundation

Kylee Mitchell Wells | SE Michigan, Ballmer Group, LLC

Jane Morgan | JFM Consulting Group

Mariam Noland | Community Foundation for Southeast Michigan*

Isaiah Oliver | Community Foundation of Greater Flint*

Darren Reisberg | The Joyce Foundation*

Kunza Shakil | Arabella Advisors

Jenée Velasquez | The Herbert H. and Grace A. Dow Foundation

Regina Bell | Council of Michigan Foundations

Kyle Caldwell | Council of Michigan Foundations

^{*}Titles and organizations listed are based on their roles throughout the completion of this pilot project. These roles may have changed since the publication of this playbook.

Highlights from the **5 Locations Participating** in the SEF Pilot













Ann Arbor Area Community Foundation

Providing Access to All in **ARPA Funding**

The Ann Arbor Area Community Foundation (AAACF) is building a coalition that centers the voices of connected community leaders, with support from the SEF. The coalition is hosted and supported by the community foundation and Washtenaw County for the purpose of influencing public funding.



The Challenge and Opportunity:

Recognizing the need to build a coalition of diverse voices to provide input on public funding and other issues impacting Washtenaw County, AAACF took on the challenge of building a table alongside community leaders and organizations to effectively advocate for the needs of their community. Many leaders and organizations had great ideas, but were unfamiliar with the complexities of public funding, including which aspects of the municipal budget were open to influence.

With the support of SEF Strategic Support Pilot dollars, AAACF worked closely with the community to assemble a diverse group of leaders, and with the support of technical assistance providers, equip them with the tools and training to develop projects eligible for ARPA funding. Consequently, coalition members can now leverage their county connections to advocate for their communities and explore emerging opportunities for civic participation. This transformation has enabled more informed and impactful community engagement, ultimately contributing to the betterment of Washtenaw County.

"This is where we can be impactful, by providing data and resources, bringing various groups across our communities together to see how we can improve the lives of everyone in our community. That's what we were able to begin through the process of the SEF."

Shannon Polk President and CEO **AAACF**



Background:

AAACF approached community investment with an inclusive mindset, asking, "Who hasn't been part of past community engagement?" This question guided their mission to bring diverse voices to the table and shaped their engagement in the SEF Strategic Support Pilot process.



"Oftentimes philanthropy, because of our vast resources, will want to dictate what engagement should look like and what the agenda should be. We put our trust in the community, who are experts, and let them tell us what the greatest challenges and needs are, and then we came in as a resource and support on how to best advocate for those needs. We had individuals who represented returning citizens, immigrants, the LGBTQIA+ communities and more. We were able to create a table where they could share with us the challenges for the community; that would not have happened without the investment of the SEF dollars," said Shannon Polk, president and CEO, AAACF.

This approach led AAACF and the coalition to define a process for engaging with Washtenaw County leaders and learning to advocate effectively within municipal systems. The SEF Strategic Support Pilot enabled AAACF to provide stipends to community members for their participation, fostering broader community representation.

The Work:

In Ann Arbor, the SEF regional collaborative supported this process by:

- Working alongside community leaders to develop a table of residents who are engaged on an ongoing basis with Washtenaw County.
- Leveraging technical assistance support to provide a fiscal justice analysis of the county budget.
- Building alignment with Washtenaw County and developing a partnership with the Washtenaw County Racial Equity Officer.

With a table of diverse voices and a process in place for building better relationships, AAACF and their coalition were able to truly get to work. However, while they had set the foundation for building new relationships, they needed to provide the coalition with the tools and information necessary to advance their advocacy.



While budgets and other planning processes are often open to anyone who would like to participate, municipal budgets can be complex, with various funding sources, line-item appropriations and other nuances. As a first step to supporting coalition members in engaging in the budget process, AAACF wanted to ensure all participants felt confident in advocating for themselves and their community, which meant they needed to understand the process and trust that there was a good faith effort among municipal leadership to listen to their needs.

AAACF partnered with the Washtenaw County Racial Equity Officer in bridging this divide between community leaders and the county.

"Part of systemic change is doing policy work, which means we have to have deep relationships with our government partners as well as our community members and partners. This meant deepening our relationship with Washtenaw County," Polk said.

AAACF collaborated with community members and coalition partners to develop budget proposals that advocated for their respective communities. Through a co-designing process, AAACF facilitated the creation of these proposals, connecting coalition members with key county officials to champion their causes. This not only empowered coalition members to advocate for themselves but also led to unexpected benefits, such as forging new county relationships and discovering leadership opportunities on various boards and commissions, along with alternative funding avenues. These two-way relationships are helping to bring new issues and priorities to the county and helping diversify leadership on boards and commissions.

"As a nonprofit that empowers formerly incarcerated individuals' return to their community, we are used to people having misconceptions of the people we serve. But we also learned that we had misconceptions of county staff. We learned through this process that they are helpful and willing to walk alongside us as we worked together," said Adam Grant, executive director of A Brighter Way and a participant in the coalition.

AAACF has also found this to be the case. These efforts to reach out to the community have helped foundation staff to connect with individuals they hadn't always engaged in the past, and created new opportunities to work with these individuals in the future. AAACF has a new table for engagement which was built alongside community members, and they have a renewed shared vision of a better Washtenaw County.

"This is where we can be impactful, by providing data and resources, bringing various groups across our communities together to see how we can improve the lives of everyone in our community. That's what we were able to begin through the process of the SEF," Polk said.

The pilot has already had other meaningful and lasting benefits.

"The SEF created a space for community members to not only get to know us better but to get to know the county better and to build trust with one another," Polk said. "By being selected for the SEF, it gave us the opportunity to strengthen these relationships between communities that have similar interests, but don't always have access to the information and resources necessary to properly represent the interest of their communities."

Through this process, the Ann Arbor area has demonstrated the value of diverse perspectives and experiences in shaping community-focused decisions and building stronger, more informed and more interconnected communities.

Key Insights:

- AAACF used SEF Strategic Support Pilot dollars to work with community to build a table of diverse community leaders and provide those leaders the tools and training to develop projects that could be funded utilizing ARPA funds.
- Many community members and organizations had not been part of public funding conversations before, but through the pilot, their participation has increased transparency in the process of budget development and decision making. AAACF recognized that people needed access and information to be able to advocate for themselves and their communities.
- AAACF supported organizations and community members to have their ideas heard and understand which areas of a municipal budget should be influenced with public input.
- This coalition of community leaders and organizations has built new networks inside the county and new networks amongst themselves.
- Coalition members are now able to use their connections inside the county to advocate for their communities and learn about new opportunities for civic participation.

Community Foundation of Greater Flint

Better Community **Outcomes** through Collaboration

Community Foundation of Greater Flint (CFGF) is partnering with organizations to improve the social determinants of health through civic participation.

The Challenge and Opportunity:

Flint residents have a history of organizing, but the Flint water crisis has left generational scars and distrust in the community. CFGF needed to build trust with community members and create a willingness to engage with their municipal government.

CFGF partnered with organizations to empower residents in decision-making, targeting the social determinants of health through civic engagement. They engaged Flint's community to guide ARPA funding allocation equitably, leveraging preexisting coalitions and fostering resident involvement.

This process not only resulted in valuable outcomes but also boosted resident engagement, bridging gaps between the municipality and residents. CFGF utilized SEF Strategic Support Pilot funds to offer stipends and capacity-building support to partner organizations, ensuring equity remained central to the conversation. In this collaborative effort, CFGF and its partners worked to empower residents, reaffirm trust and prioritize community-driven decision-making for Flint's future.



Park Improvements at St. John Street Memorial Park Project Funded with ARPA Dollars

"The community foundation, over our many years, has taken on a lot of projects to amplify resident voice, but this opportunity allowed us to take our efforts deeper than just public input."

Lynn Williams

Director of Equity & Community Engagement **CFGF**

Background:

Flint's history reflects its residents' resilience and capacity for community organizing, especially during tough economic, social and health challenges. Community groups, churches and neighborhood organizations have often taken the lead in supporting each other when institutional systems struggled. This strong tradition of grassroots organizing is grounded in a commitment to community well-being and justice. At the same time, these challenges have also led to a decline in trust in institutions among residents.



\$5M in Critical Home Repair Funding | Funding Recommended by the ARPA Community Advisory Committee

With a recognition of both the tension points and opportunities offered by the influx of public dollars, the SEF pilot offered CFGF an opportunity to focus on rebuilding trust by actively involving the community in the decision-making process for the distribution of ARPA funds and other federal dollars. This approach aims to ensure that municipal decisions are reflective of and beneficial to residents' needs by tapping into Flint's history of community collaboration while facilitating spaces that can restore faith in local institutions and reinforce the city's commitment to its residents.

The Work:

In Flint, the SEF regional collaborative supported this process by:

- Providing financial resources to community organizations to support targeted outreach to under-represented and historically underserved communities.
- Creating an inclusive resident advisory model and grant making process to aid the city of Flint in distributing nearly \$60 million in ARPA funds.

- Engaging local community-based organizations to provide technical assistance to nonprofits and organizations seeking to apply through the ARPA grant program.
- Continuing the implementation of a community engagement framework across city departments and functions through a permanent position within the city.
- Leveraging SEF Strategic Support Pilot dollars to provide stipends to inclusively engage diverse voices at decision making tables, and in turn strive to ensure equity remained at the center of the conversation. They also provided capacity-building funds for organizations who worked alongside CFGF in this process.
- Helping community members and organizations navigate how to apply for funding through the ARPA Community Advisory Committee process.

"The community foundation, over our many years, has taken on a lot of projects to amplify resident voice, but this opportunity allowed us to take our efforts deeper than just public input," said Lynn Williams, director of Equity & Community Engagement, CFGF.

The focus of the work is rooted in the understanding that civic engagement is one of the social determinants of health. Civic engagement plays a crucial role in shaping the policies, resources and social environments that ultimately impact individuals' well-being. When individuals are actively engaged in their communities and have a voice in decision-making processes, it can lead to improved access to healthcare, social support and the creation of healthier living conditions. CFGF hoped that by developing new channels for deeper engagement alongside the community, Flint residents would have more access to shape the future of their city.

This deeper engagement specifically included requesting proposals from residents and organizations across Flint, inviting them to propose projects that could be funded through ARPA funds with a focus on economic development, neighborhood improvement, public health and public safety/ youth development. These focus areas were determined through listening sessions hosted by the mayor and city council in 2022.

From there, the city council appointed 12 Flint residents to serve on Flint's ARPA Community Advisory Committee. To ensure representation throughout the city, each ward had at least one representative. The committee members were chosen through an open selection process using a scoring rubric to evaluate their applications.

The ARPA Community Advisory Committee was intended to give residents a voice in the grantmaking process, ensuring that funds were awarded in a way that builds a stronger, more equitable economy as Flint recovers from the pandemic.

"We made every effort to remove bias from the committee selection process in order to give residents a seat at the table. and I want to thank the committee members who have stepped up to serve our community in this way," Flint Mayor Sheldon Neeley said.

The committee helped to evaluate ARPA community grant proposals and make award recommendations related to the \$15.6 million available for community grants as part of the city of Flint's overall allocation of ARPA funding. The committee's recommendations were reviewed by the mayor and Flint City Council, who ultimately made the final decision on funding awards.

In total, the Flint ARPA Community Advisory Committee made recommentations for the allocation of \$15.6 million, with the support of the Flint City Council. One of the focus areas included \$5 million for home repair programs for Flint residents, including \$1.5 million to Metro Community Development, \$1.5 million to Habitat for Humanity and \$800,000 to Genesee County Community Action Resource Department to provide home repair services directly to Flint residents citywide.

These home repair programs are designed to assist residents in the restoration and rehabilitation of their homes, and in avoiding foreclosure. As a result, the city of Flint hopes to improve housing conditions, health outcomes and mental health while decreasing the migration of people out of the area.

"Flint families have been asking for help with critical home repairs, and today we have a message of hope that help is on the way," Neeley said.

Key Insights:

- Recognizing some Flint residents are wary of working with government, CFGF wanted to use this process to build bridges between the municipality and the residents.
- Deepened community engagement itself has been an outcome. By bringing people to the table to help make decisions around budgeting, residents have reported feeling more engaged. CFGF and the city of Flint are using this momentum to continue building trust.

Grand Rapids Community Foundation

Participatory Budgeting

The Grand Rapids Community Foundation is working with the city of **Grand Rapids to support a Participatory Budgeting process that engages** residents in allocating \$2 million of ARPA resources.



Cure Violence | New program funded by 2nd Ward residents through Participatory Budgeting

The Challenge and Opportunity:

The community foundation, in partnership with a number of funders and community-based organizations supported the city of Grand Rapids in implementing a Participatory Budget (PB) process, granting residents the power to support the equitable allocation of ARPA resources. The role of the funding partners extended beyond financial support by equipping the community with the necessary information, resources and expertise to ensure that the PB process was truly equitable, working alongside and collaborating with community-based organizations and other funders.

In addition to community engagement and equitable decisionmaking, using the PB process helped to redefine the relationship between communities and decision-makers, emphasizing shared power and sustained community engagement with the understanding that an equitable process entails granting residents ownership of the process, empowering them not just to advise but to fully participate in shaping their community's future.

For more details on Participatory Budgeting visit: participatorybudgeting.org

"We know that once this wave of funding passes, we will still be left with a community that wants to be in a different relationship with how decisions are made, so how do we establish new expectations for how the community partners with system leaders to change the nature of the relationship towards community power and decision making?"

Kate Luckert Schmid

Vice President, Program

The Grand Rapids Community Foundation

Background:

Grand Rapids has three distinct wards that have historically faced challenges in receiving equitable investment. Notably, the third ward, which is the most racially diverse and has experienced the impacts of redlining, has historically seen less investment. In response to these disparities, over the last decade the city of Grand Rapids has been actively working to promote more equitable investment across all its wards.

While investments have become more equitable in distribution, questions remain about the types of investments and their alignment with the specific needs of each community. To address these complex challenges, the city implemented PB as a strategy for more inclusive and representative budgeting decisions.

PB is a democratic process where community members directly influence the allocation of a portion of the public budget. This method goes beyond traditional decisionmaking by elected officials, allowing residents to have a direct role in choosing projects or initiatives for funding. This approach promotes transparency and aims to ensure that the allocation of resources truly aligns with the community's needs and priorities.

Implementing PB in Grand Rapids has helped build resident power, particularly in historically underinvested areas, by giving them a voice in fiscal decisions. This initiative is part of an ongoing effort to address investment disparities and enhance community involvement in fiscal governance.

"Our role is to ensure the community is properly resourced with the financial resources, technical expertise and power to ensure fidelity in a process that keeps equity at the center," Kate Luckert Schmid, vice president, program at Grand Rapids Community Foundation said.

The community foundation partnered with a number of community-based organizations and funders including CMF members the W.K. Kellogg Foundation, Wege Foundation, Steelcase Foundation and Frey Foundation.

The Work:

In Grand Rapids, the SEF regional collaborative supported this process by:

- Securing an experienced participatory budgeting consultant to provide technical assistance to the city and members of a steering committee, as well as direct assistance to residents as they developed proposals.
- Providing financial resources to community organizations to support targeted outreach to under-represented and historically underserved communities.
- Continuing the implementation of a community engagement framework across city departments and functions through a permanent position within the cityfunded Office of Equity and Engagement.
- Establishing near- and long-term goals designed with the community and an equity-centered approach which will continue to be referenced as more federal resources become available.

"We know that once this wave of funding passes, we will still be left with a community that wants to be in a different relationship with how decisions are made, so how do we establish new expectations for how the community partners with system leaders to change the nature of the relationship towards community power and decision making?" Luckert Schmid said.

With a vision toward replicability and learning, the regional collaborative wanted to ensure there was intentionality and dedication in their learnings to apply again in the future.

"As a community, whether we choose to use the participatory budgeting process again or similar approaches, we certainly are going to evolve in how we can partner with community and how the themes and things we learn collectively through this experience can be applied to future engagement opportunities with community," Luckert Schmid said.

While the potential impact of PB is clear, before entering into the process, the drawbacks must also be understood. The collaborative in Grand Rapids was clear-eyed about the potential challenges of balancing timelines while advancing a process that engaged all residents and aligns with PB standards. "One thing we aren't going to do is deviate from the equity lens even if there's a barrier in the process," Luckert Schmid said.

The PB process offers an opportunity to build and sustain trust throughout the process, with all parties at the table working together as partners. The municipalities need to trust that the community is going to advocate for their needs, and the community needs to be able to trust that their recommendations will be taken seriously and inform decision



Lead Water Line Replacement | Project funded by 3rd Ward residents through PB

making, recognizing the final approval for the allocation of public funds is given by elected leaders.

This effort has served as a reminder of the varied roles and resources of philanthropy. Beyond financial support, foundations have the ability to share power and access with communities and have the opportunity and obligation to advocate on behalf of communities, amplifying the voices of historically underserved and marginalized populations.

"We encourage funders, and we're encouraged, to stop and reflect on whether we're taking advantage of every opportunity to share that power with the community. Community knows not only what it wants but what it needs. A process that allows residents to not just advise or recommend but to own the process in its entirety leads to more equitable outcomes," Luckert Schmid said.

Key Insights

- Partnerships with community-based organizations are essential for engaging under-represented and historically underserved communities effectively.
- PB requires dedicated resources for education and engagement to ensure a transparent and inclusive process.
- Successful implementation of PB hinges on the commitment and support of all partners to realize community visions.
- Philanthropy plays a key role beyond financial support, offering resources and access that enables sharing power with and being an advocate for community in new and impactful ways.

Community Foundation of Marquette County

Breaking Down Barriers to Childcare

Community Foundation of Marquette County (CFMC) partnered with Marquette County, utilizing their master plan, to access funding to support a new childcare initiative.



The Challenge and Opportunity:

In Marquette County, the scarcity and high cost of childcare severely impacts families, especially those with low to moderate incomes, forcing some parents to leave their jobs to care for their children.

Recognizing these challenges, CFMC joined forces with Marquette County, technical assistance providers like Grow & Lead and Regionerate LLC, and a coalition of providers and experts. Together, they aimed to develop and implement strategies to enhance childcare availability and affordability by building a pipeline for new childcare entrepreneurs.

Grounded in Marquette County's Master Plan, this collaborative effort focused on improving residents' lives through the training of licensed childcare entrepreneurs, offering support to both new business owners and parents looking to reenter the job market by enhancing access to affordable and accessible childcare.

"Our community leadership role goes beyond grantmaking, and our job isn't solely to be an advocate for our nonprofit partners in a time when significant financial investments are coming to our area. We can help lift up the voices of our [govenmental units] themselves and those they serve."

Zosia Eppensteiner

Chief Executive Officer

CFMC



Background:

Marquette County has been trying to bridge a significant gap in childcare. Local data shows about 8,360 children currently in need of care, but there are only 1,914 childcare slots available. The situation has been made increasingly more difficult due to a number of factors including staffing shortages, transportation difficulties and rising inflation. These challenges impact families across all income brackets, particularly those with lower incomes, leading some parents to adjust their employment to care for their children, especially when specialized childcare is needed for children with neurodiverse needs or physical disabilities. Families facing homelessness also encounter unique obstacles in accessing childcare. Improving childcare availability and affordability was identified as an essential need to support a more inclusive community for all families.



Technical Assistance and Training Session

The Work:

CFMC partnered with Marquette County to determine the best way to utilize incoming ARPA funds to address community needs with a focus on accessible childcare and homelessness. There has been significant work done around homelessness, but for the purposes of this playbook, the focus will be on the work around childcare.

In Marquette, the SEF regional collaborative is supporting this process by:

- Developing a Childcare Coalition to understand systemic challenges in the area.
- Deepening cross-sector partnerships and connecting community assets to deliver an innovative program design for addressing childcare needs.
- Developing the Childcare SPARK program to help interested entrepreneurs understand, launch, operate and grow home-based childcare businesses.

As the Childcare Coalition (CCC) formed, their initial step to tackle Marquette County's childcare crisis was organizing a strategic retreat, creating a shared success vision and pathway projects to enhance the childcare ecosystem. The coalition pledged to collaborate across organizations and recognized the need to research affordable childcare supply and demand data. They also crafted an action plan to secure ARPA funding from the county.

Common themes that emerged from the CCC discussions included the need for quality and affordable childcare, livable wages for providers and workers, and a strong talent pipeline for early childhood education professionals. The coalition is exploring various initiatives, leveraging existing assets, developing innovative business models to support childcare centers, collecting data and engaging with key stakeholders.

CFMC began working directly with technical assistance providers Grow & Lead and Regionerate LLC and community partners to identify recommendations to promote local strategies for accessing quality and affordable childcare for Marquette County families.

"The creation of the SEF has been invaluable. As a rural region that lacks capacity, we wouldn't be able to do this work without technical assistance support to help us think outside of the box and develop new systems," said Zosia Eppensteiner, chief executive officer, CFMC.

With background data in hand, partnerships built and access to high-quality technical assistance providers, CFMC was able to develop the Childcare SPARK program.

Childcare SPARK — a partnership between Lake Superior Community Partnership Foundation, Great Start to Quality Upper Peninsula (UP) Resource Center, Marquette-Alger Regional Educational Service Agency, CFMC and Marquette County — is an ambitious initiative designed to create a pipeline of childcare providers who can offer economically viable and financially sustainable high-quality care services for all families in the region.

The pilot program offered direct support to cohorts of aspiring entrepreneurs looking to establish their home-based childcare businesses. Over time, as childcare options grow, this initiative is expected to significantly reduce the barriers faced by parents trying to reenter the workforce.

In September 2023, the first cohort of three childcare providers graduated from the Childcare SPARK program, supporting up to 18 families in Marquette County. Childcare Spark is currently enrolling members for the second cohort, and the program already has over 10 new participants enrolled.

One of the key strategies of Childcare SPARK is to focus on supporting entrepreneurs from underserved communities, with a specific emphasis on marginalized populations. By targeting these individuals, the program aims to ensure that licensed home-based childcare services are accessible to all families.



A program graduate at the opening of a new childcare facility

Childcare SPARK recognized the importance of providing entrepreneurs with the necessary resources and a carefullydesigned curriculum to help them build their capacity and business skills effectively. Additionally, mentors from the community, who share similar lived experiences, were available to offer guidance and support to the cohort members.

The program's vision extends beyond increasing the number of childcare providers; it seeks to strengthen the fabric of the community and cultivate a culture of support and pride in local businesses and resilient economies. By fostering strong connections and collaboration between entrepreneurs, childcare providers and community organizations, Childcare SPARK is building a supportive network that contributes to the overall well-being and economic growth of the community.

To learn more about Childcare Spark visit: marquette.org/childcare-spark

Key Insights:

- CFMC started with a vision for how they wanted to utilize the ARPA funds, informed by local data and aligned with the Marquette County Master Plan.
- Getting a cross-sector coalition of providers, experts, Marquette County leaders and CFMC staff together in the same room with a technical assistance provider was one of the most notable successes of this work.
- Identifying a specific focus area allowed Marguette County to move more quickly into the implementation of its ARPA funds.
- Marquette County is a rural area; the coalition recognized the importance of meeting people where they were to ensure each part of the county was considered in better understanding ongoing childcare needs.
- CFMC partnered with technical assistance providers, Grow & Lead and Regionerate LLC, and community partners to identify recommendations to promote local strategies for families to access quality and affordable childcare in Marquette County.
- The Marquette pilot site and Childcare Spark supported the program design and evaluation for a cohort of entrepreneurs representing underserved communities in building licensed home-based childcare provider businesses.

The Pontiac Funders Collaborative

Creating a More Inclusive **Economy**

The Pontiac Funders Collaborative (PFC) is supporting Pontiac organizations' collaboration and capacity to influence, manage and deploy ARPA funding toward equitable outcomes for entrepreneurs and youth in Pontiac.



The Challenge and Opportunity:

Pontiac is building a strong entrepreneurship community, responding to the region's workforce shift away from the auto industry. The Pontiac Funders Collaborative (PFC) and the Community Foundation for Southeast Michigan (CFSEM) are working to diversify jobs and boost entrepreneurship for wealth creation.

PFC's approach includes two main phases with SEF Strategic Support Pilot funds: technical support to local groups to help with equitable economic growth, followed by projects rolled out for entrepreneurs using government funds. PFC formed a coalition of public, philanthropic and nonprofit leaders to work together on economic development. This also involved giving stipends to Small Business Roundtable members to support their involvement in assisting Pontiac's entrepreneurs. This approach is a significant move toward equitable economic growth and sustainable development in Pontiac.

"When you're working in service of the community, one of the biggest issues is developing trust. This often starts with building trust between the organizations that serve our communities. That's what we've tried to do: bring a level of trust and understanding to solve a community goal."

Dustin McClellan Chief Executive Officer

Pontiac Community Foundation



Background:

Pontiac, Michigan — once a stronghold for stable employment in the American automotive industry — has undergone significant changes with the departure of this core business from the city. This shift created an impetus for the city to reimagine and diversify its economic base, adapting to a new economic landscape. The transition has seen the community and local businesses pivot from a predominantly industrial economy to one with a more varied and entrepreneurial focus.



TA Provider Third Eye Network Site Visit

PFC's partnerships are focused on increasing this shift toward entrepreneurship. While this evolution of Pontiac's economy is an ongoing process, the cross-sector partnerships and community-led initiatives — specifically with Pontiac's young entrepreneurs — reflect a long-term view grounded in community resiliency.

The Work:

In Pontiac, the SEF Strategic Support Pilot is supporting this process by:

- Hosting an Undoing Racism Community Organizing workshop, presented by TA providers.
- Providing physical location for convening the coalition, which also provides resources for entrepreneurs in Pontiac.
- Funding technical assistance for the coalition partners.
- Funding the implementation of two entrepreneurship programs developed by coalition partners aimed at leveraging government funds.
- Using a participatory approach to inform the city's economic development plan.

Economic development is more than just recruiting new businesses; it's also supporting businesses that are already in place and providing resources, training and support for people who are hoping to start a new business. This final part, supporting new entrepreneurs, was what the Pontiac Funders Collaborative, managed by the Community Foundation for Southeast Michigan (CFSEM), was focused on through their engagement in the SEF Strategic Support Pilot.

The first round of funding from the pilot supported four current partners of the collaborative in working with technical assistance providers. These partners included the city of Pontiac, the Pontiac Community Foundation, the Pontiac Collective Impact Partnership and Main Street Pontiac.

One part of that initial funding supported a physical space that allowed for collaboration between the various partners, and it also provided a space for current and future entreprenuers to learn more about the resources that each of the partners offer.



"This pilot provided us with the space to speak candidly about youth entrepreneurship and other economic development programming happening across the community, in a way that we wouldn't have organically come to do without this work. That habitual meeting space was helpful for the city of Pontiac," Alexandra Borngesser, director of grants & philanthropy for the city of Pontiac said.

Technical assistance providers worked with the city of Pontiac, including conducting focus groups and interviews, to bring a more participatory approach to the city's economic development planning. This has helped to strengthen ties between the city government and community.

The second round of funding is supporting the implementation of two entrepreneurship projects developed by these organizations. The projects promote entrepreneurial efforts and work to create career opportunities for young adults in the community.

The Pontiac Collective Impact Partnership (PCIP) is advancing its efforts to create career opportunities for young adults through exposure to entrepreneurship via summer internships and other approaches. Its strategy is also to work in collaboration with community partners to promote localized, tailored efforts that advance the economic mobility of Pontiac youth.

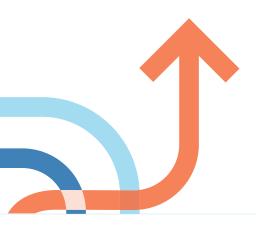
The PCIP is utilizing the SEF Strategic Support Pilot funding to test new models for youth entrepreneurs that fit into the local landscape and direction.

"You can imagine the investments made today will have a lasting impact on Pontiac. This will enable our young people in Pontiac to gain access not only to the services we provide, but also to a broad set of tools from a variety of organizations and partnerships, helping them build a business," Dr. Samino Scott, executive director, PCIP said.

The SEF Strategic Support Pilot has been able to support PFC in convening the organizations and facilitating a more thoughtful engagement process with young people and other entrepreneurs in Pontiac. The funds are helping to broaden capacity and ensure that those starting new businesses in Pontiac will have the support of their community for years to come.

Key Insights:

- Pontiac utilized the SEF Strategic Support Pilot funds for two phases surrounding economic development. The first was technical assistance to build internal capacity for the involved organizations as they focused on equitable economic development and and the second enabled implementation of two entrepreneurship projects that leveraged government funds.
- PFC convened the collaborative of organizations that brought together the public sector, philanthropy and the nonprofit sector to leverage government funds for economic development.
- PFC is using SEF Strategic Support Pilot funds to provide stipends to members of its Small Business Roundtable to cover the cost of participation in the roundtable and supplement the cost of work in service to Pontiac entrepreneurs.



Key Learnings to Bring to Your Community

The SEF Strategic Support Pilot brought into sharper focus the critical role philanthropy plays as a convener, bridge builder and advocate for equitable, inclusive, community-centered decision-making of public resources through public-private partnerships. Place-based foundations can play a role in not only shaping investments but also serving as accountability partners to government and community in ensuring that investments over the long term positively impact historically underserved populations.

The SEF Strategic Support Pilot Working Group contracted JFM Consulting Group to perform a formative evaluation of the work, which concluded in September 2022. The learnings and recommendations from their evaluation are incorporated into the following key takeaways.

Lessons Learned

A Program Centering on Collaboration

Budget processes present a unique opportunity for collaboration, where a diverse range of partners, including philanthropy, the community and the municipality, can unite toward a common goal. Central to this collaboration is the establishment of trust and good faith among all parties. Engaging the community in this process is vital, and it's important to clearly communicate the areas where their input can have a tangible impact. Keeping promises and maintaining transparency throughout the process reinforces this trust.

One role of philanthropy in this process is convening, and when working with groups that may have a history of distrust, it's important for philanthropy to leverage its role as a convener to recenter their relationships so that trust can be built.

Many of the organizations and individuals that participated in the SEF Strategic Support Pilot reported that partnering with their government has reduced sentiments of mistrust they had previously toward municipal leaders and staff. This mutual understanding and respect can lead to more effective and inclusive decision-making, benefitting the community as a whole.

Coalition Education and Technical Assistance

Technical assistance (TA) provided through SEF Strategic Support was instrumental in empowering pilot communities in their initiatives. By incorporating TA, communities were

equipped with the necessary tools and knowledge to embark on new relationships and policies with a strong foundation.

"It's all of us together. That has to be the emphasis of this work — partnering to share our experiences and using our gifts to solve our shared challenges."

— Pastor Monica Villareal Pastor of Salem Lutheran Church Flint Coalition Participant

There were many key contributors in this process. Activest, for example, offered valuable fiscal justice analysis, enabling pilot sites to gain deeper insights into equitable financial practices. PolicyLink has been pivotal in bridging the partnership between philanthropy and municipalities, guiding communities through the nuances of collaborative work. Regionerate has been essential in facilitating the convergence of diverse groups toward common goals, particularly in areas like Marguette, where they aided in communicating community needs and advocating effectively. Third Eye Network played a significant role in organizational capacity building, ensuring that coalition members were well-equipped to engage in complex processes. They also worked to help communities define equity for themselves and hosted a racial

healing circle and an Undoing Racism workshop for municipal and community leaders in Pontiac.

The involvement of these TA providers has been a key factor in ensuring the success of these initiatives, demonstrating the substantial benefits of expert support in community-led equity efforts.

The Role of Convening in Coalition Building

Coalition building was seen as one of the most important wins from this work. This work has been essential in bringing diverse voices and perspectives to the forefront, ensuring groups are reflective of community needs and aspirations.

Philanthropy, in this context, extends beyond being a mere funding source. It acts as a catalyst for community empowerment and engagement, with philanthropic organizations using their resources and networks to convene a variety of stakeholders. This convening power is crucial for creating spaces where communities can collaborate, share insights and develop tailored solutions.

"I am an expert in community-based economic development, but I'm not an expert in your community. But, when we combine our experiences and value each other's experience and expertise equally, we can build something that is exceptional together."

Lomax Campbell Technical Assistance Provider Third Eye Network

> In Marquette and Pontiac, these convening opportunities have led to the formation of cross-sector partnerships, each addressing unique challenges. In Flint, the coalition was made up of community organizations, with a focus on the equitable distribution of funds within the community. The SEF Strategic Support Pilot has enabled locations participating in the pilot to leverage the experience and knowledge of local residents, combined with strategic philanthropic support, creating innovative solutions to challenges and more equitable resource distribution.

As a direct result of CFMC's participation in the SEF, they were able to establish an endowed fund to support the ongoing needs of the Childcare SPARK program. This is the first fund proactively established by the CFMC board of trustees to build a sustainable funding source that addresses a community-identified need.

The role of philanthropy in these efforts goes beyond financial assistance; their role has served to help nurture a culture of collaboration, empowerment and sustainable change. By bringing together different stakeholders, including local residents, philanthropic organizations have facilitated impactful and lasting improvements in community development, driving a sense of shared purpose and collective responsibility essential for longterm community growth.

Coalition building has been instrumental in ensuring that each community actively involves residents with intimate knowledge of local challenges. Through an audit performed through consultants, JFM Consulting Group, data revealed that coalition participants came from diverse backgrounds and sectors and brought years of community experience and a deep understanding of local economic challenges to the table. Being part of these coalitions not only allowed participants to contribute their insights but also provided them with opportunities to deepen their understanding of fellow coalition members. This collaborative process highlights the strength and wisdom inherent in community-led initiatives.

Diverse Voices. Unified Visions

In the dynamic process of community problem-solving, the diversity of opinions offers a valuable opportunity for identifying and addressing community needs. Through the SEF Strategic Support Pilot experience, it's evident that communities can effectively align their visions, especially when guided by strategic philanthropic convening.

The role of philanthropy in these scenarios is crucial. Philanthropic organizations provide a neutral, open table where different sectors, including those with varying goals and perspectives, can freely communicate their objectives. This facilitation is key to maintaining a focus on serving the broader community's needs.

Philanthropy's role extends beyond bringing parties together; it involves navigating diverse viewpoints and fostering an

environment where shared values can be identified and nurtured. Philanthropy has the influence and convening power to change local systems. This process is part of community development, where the convergence of diverse voices leads to more comprehensive and effective solutions, transforming diverse strengths and visions into unified efforts that address complex community needs in a more inclusive and impactful manner.

Sharing Power in Budgeting

The distribution of public funds, traditionally the responsibility of municipalities, presents an opportunity for innovative collaboration and shared governance when municipalities choose to partner with community foundations, placebased funders or coalitions. Such partnerships, though not obligatory, can enhance the decision-making process by incorporating diverse community perspectives, thereby enriching the process of public fund allocation.

An example of this collaborative approach can be seen in Flint, where the coalition proactively reached out to the community to solicit project and program ideas for potential funding through ARPA funds. This was a step toward inclusive governance, by inviting community members to contribute directly to the decision-making process. While some members of the Flint Board of Commissioners expressed reservations about the chosen projects and the perceived shift in their traditional role, the involvement of a broader coalition can bring valuable insights and perspectives, ensuring that the allocation of funds aligns closely with community needs and aspirations.

This approach underscores the potential for municipalities and community groups to work together in a manner that respects the formal authority of municipal bodies while also embracing the insights and contributions of community-led coalitions.

Valuing Partnerships and Perspectives

In coalition building, the need for mutual respect for each partner's perspective is crucial. Each participant has to recognize that every other participant, whether a community member, an organization, stakeholder or a municipal leader contributes uniquely and significantly to the collective effort.

The power of this approach is in acknowledging that each perspective brought to the table is not just an addition but an essential ingredient to the success of the whole. Each participant's viewpoint is valid and necessary to building

something better for the community. This mindset fosters an environment where all voices are integral to shaping and then realizing shared goals.

In practice, this means actively listening to and incorporating the insights and experiences of all partners. For philanthropy, if it is convening these coalitions, it's about creating a space where differing viewpoints are not just included but celebrated as opportunities for deeper understanding and learning, elevating the coalition's work from a series of individual efforts to a unified collaborative.

This shifts the focus to the value that each partner brings to the table, highlighting strengths and a diversity of experiences. Establishing this belief in the coalition will enhance the effectiveness of its work and build a sense of belonging and ownership among its members.

Progress Happens at the Speed of Trust

Trust is crucial in community engagement, but it's important to remember that building it is a gradual process. This means organizations need to create space for trust-building interactions, understanding and respecting the unique needs and values of their communities. This involves active listening, demonstrating genuine commitment and delivering on promises.

However, budgetary processes or other community crises often face tight deadlines or the need to move quickly on certain projects. The lack of established trust can be a significant hurdle in these moments. Quick decision-making becomes challenging when the foundational trust isn't there, as people may be hesitant to share their ideas or collaborate effectively.

This reality underscores the importance of starting trustbuilding efforts early. Even if there's an immediate need for fast action, laying the groundwork for trust can pave the way for smoother, more effective collaboration in the future. Involving a wide range of community members, especially those who have been historically left out, can bring diverse perspectives and skills to the table, enhancing the problemsolving process.

While building trust takes time, it's a crucial investment for any organization involved in community engagement. Balancing the need for quick action with the process of trust-building is essential.

Key Questions to Bring to Your Community

Building partnerships for equity-centered approaches to investments is important work, and it has to be done with intentionality. A level of trust and shared purpose must be established as these partnerships are developed. We've compiled a set of questions to ask yourselves and your partners to explore as you consider a similar partnership.

Key Questions

- Does your community and/or municipality have a working definition of equity? Is there an equity lens/rubric already being used to evaluate policies and public funding decision making?
- Is there clarity on where disparities exist? What data is being used to understand those disparities?
- Are you going to partner at the county or city level? Have you partnered with them in the past?
- What is the goal in this work is it to seek community input or is it to create opportunities for community residents to participate in and influence decision making?
- Does your community already have existing coalitions or would you be building them?
- Is there an understanding of community assets?
- What groups have not been engaged in coalition work in the past? Who hasn't been involved in decision making in the past?
- What funds are you helping to distribute? Does the municipality already have those funds allocated?
- Is your municipality looking for a partnership, or must the case be made to work together?
- Are participating community members informed on the issues?

- What type of technical assistance will be needed to make this successful? Who is paying for that education and assistance?
- How will this work be funded?

"This is a time when people are expanding the notions about how we create an equitable society. This is a time to come big and to demand lasting transformative change."

Angela Glover Blackwell

Founder in Residence PolicyLink





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To learn more about the Statewide Equity Fund visit

michiganfoundations.org/policy/statewide-equity-fund