causeway

Community Grantmaking Guide

Build neighborhood trust and uncover grassroots leadership.

OVERVIEW

Causeway's community grantmaking model, called The Challenge, empowers residents and neighborhood leaders to make decisions about the change they want to see in their community.

The Challenge is an ideas contest centered around a specific question that empowers individuals to pilot their ideas for community change. Inspired by the Knight Foundation Neighborhood Challenges, Causeway launched the first Challenge in 2014 and asked: How can we make Chattanooga a more connected city?

Since 2014, we have hosted seven different Challenges, investing $280,000 in 130 grassroots leaders. We have decided to share our process openly and free of charge because we believe it is an invaluable tool for organizations, foundations, and cities around the country to help create better solutions designed and led by their residents, building trust along the way.

So often, neighborhood decisions are made from the top down. The Challenge flips that script and puts individual community members in the driver's seat to create the change they want to see in their communities. In our years of community engagement work, one of the most valuable things we learned was that in order to have better solutions, residents must play an active role—but not just in a sharpie and post-it note kind of way. We have to move beyond that.

The Challenge is the antidote to sticky-note burnout. Simply asking for someone's opinion does not build trust. You must also be willing to put your money where your mouth is and say, "I trust you to make this idea happen and I am going to support you along the way."

Institutional leaders often have an aerial, big-picture view of what is happening in a city or a community. That perspective is crucial, but it is incomplete without perspective from a community member whose expertise comes from experiencing the issue firsthand. The Challenge is a bridge between the top-down and the bottom-up perspectives.

Do you want to host a Challenge in your city?

Challenges can be hosted by any number of organizations or entities looking to build trust, authentically engage with their community, and discover creative solutions that only people who've experienced the problem firsthand can create. If you are inspired to host a Challenge in your city, this guide is here to help!

How it Works

Our model is based on Participatory Grantmaking. There is a lot to be learned from this way of working, but basically, it is a method that "enables everyday people to play an active role in decisions that affect their lives. This means that people are not just listened to, but also heard and trusted; and that their voices and actions shape outcomes."

Challenges can be focused on a specific geographic area, like a particular neighborhood or zip code, or they can be city-wide, focused on a specific topic like health or the arts. To get started, we form an advisor committee by identifying and partnering with community members who are experts in that area or topic. The

advisor committee helps us to frame a question around some of the community's greatest needs identified by its residents and validated through research and data. Community members apply with their ideas, then the advisor committee becomes the judging panel choosing the winning projects. Winners receive small grants (we found the sweet spot to be between $2000 - $3000) and support to implement a pilot version of their idea.

After the pilot, some people realize they need to go back to the drawing board, some have a few small tweaks to make, and some have a proven concept that they're ready to take to the next level. One of our cause leaders said the Challenge strengthened her "leadership muscle" and we think that sums up the value of the program perfectly.

GETTING STARTED

Before you start, there are two things that you'll need to have in place—a team and some funding. The Challenge is scalable. This means you can do this with as little as $500 (5 projects at $100 each) or $100,000 (10 projects at $10,000 each). However you decide to break it down is up to you, but just make sure your expectations match the dollar amount you are awarding people. There's only so much you can do with $100.

The Team

Challenges can be hosted by nonprofits, businesses, volunteer groups, city governments, and foundations. No matter who is hosting, this is a great opportunity to partner with existing organizations or groups that are working toward a similar aim.

You will need:
• Project Leader
• Funder
• Designer + Communications Lead
• Outreach Coordinators (from the neighborhood)
• Organizational Partners
• Advisor Committee / Community Judges

Read the full Team Role Descriptions in the online guide.

The Funding

How much do I need?
While it may seem counterintuitive, we believe that the amount of money given out is not really the point of the Challenge. The point is to empower community leaders through meaningful engagement and to give first-timers the chance to try their hand at community leadership. The leaders that emerge from these Challenges are far more important than the solutions themselves. In our six years of hosting Challenges, more times than not, the first-time leaders went on to become powerful forces in their communities.

We tried several different amounts and found our sweet spot to be around ten winning projects at $3000 per project. However, you can scale this up or down depending on the communities' needs and the resources available to you. Remember, you'll also need funding to support the operational side of the program. We found that the Challenge program is roughly a one to one ratio of grant money to operations costs. Meaning that for every dollar we granted out, it typically costs us equally a dollar in operations costs. See this example of a Challenge Budget for a comprehensive list of the program expenses.

A Note on Funding to Individuals
Causeway was uniquely set-up to grant to individuals because we originally started as a crowdfunding platform. We realize that this might not be possible for all organizations. If you're a foundation that doesn't grant to individuals, something we found useful was for individuals to partner with an organization that is working toward a common goal. For example, a teacher working on an education-focused project might use the school, the PTA, or an education-focused nonprofit as their sponsor for the project. This way the money is overseen by a 501c3 but the project is led by an individual. We found that oftentimes if the pilot is successful, the nonprofit or school might adopt the project and the leader to run it full-time at their organization. Now that's what we call a win-win.

How do I get funding?

If you are a foundation or company that can afford to grant the money from your operating budget, then it's simple. But if you're an organization or small community group that needs to secure funding, then check out the ideas below for potential ways to fund a Challenge.

Write a grant. We have a Grant Proposal Template that you are free to use and modify according to the Challenge you'll be hosting. Consider co-writing a grant with another organization working in the same space from a different angle. Addressing the problem through a Systems-Based Approach an have a greater impact.

Get a sponsor. Challenges can be thematic, place-based, or both. Find a company that aligns with your Challenge or matches their corporate social responsibility goals. For example, a fitness company could sponsor a health-related Challenge, or a grocery store chain could sponsor a Challenge about food access. Challenges are highly public-facing and can get a lot of publicity.

Form a giving circle. If you have access to a community of people with the capacity to give large gifts, this could be a new and exciting way for them to give. Everyone can pool their money and then redistribute it through Challenge Grants. Remember, donors can be a part of the winner selection process, but unless they are totally representative of the community they are working in, they cannot have the final say in a truly participatory process. They have to be okay with giving up that power.

Make it Your Own

We want you to make these Challenges your own and adapt the process to fit your community's needs. In this guide, we've outlined the process to plan, develop, and launch a Challenge from start to finish. Use whatever is helpful and make it your own, but most importantly have fun with it and build something you're excited to launch.

FRAME THE QUESTION

Start with Research

If you're reading this guide, it's likely that you already have a topic or issue in mind you want to address. However, if you don't know what problem you want to tackle with your Challenge, check out these ideas to help you choose a topic or focus area.

Begin with a deep dive into the problem you're attempting to solve. Reach out to experts in your area and jump into your research online, but remember the research needs to take place offline as well. Get to know the people at the center of these issues to really

understand all the complexities involved. Since Challenges can be thematic or place-based, you will want to research both the topic (education, poverty, homelessness) and the impact it has had on the specific area you are working in (neighborhood, district, city). Maybe you're already well-versed on this topic, which is a good start, but hearing about it from the perspectives of different people is crucial. Include them early and often—they are your north star.

Begin by gathering the following lists:

Organizational Partner list: Who are the people already working in this space? Who would be an ally in helping us solve this problem?

Interviews: Who are the leaders in this community working on this issue, or affected by it personally, that I need to talk with one on one?

Establish your advisor committee / judging panel: Who are people that represent the voices of the community? Also, who are some experts on the topic?

There will probably be some overlap where certain people appear on all of those lists. That is okay and to be expected, especially in smaller communities.

Host Community Roundtables

For every Challenge, we host a minimum of two or three Community Roundtables that are open to the public. We usually start with a loose idea of what the Challenge question could be and gather feedback from the attendees, as well as information about the issue that helps frame it. It helps to have a draft of a potential Challenge question to give people something concrete to respond to, but note that we never left a roundtable session with the same Challenge question we had when we started. You will learn a ton.

Hosting tips:

- **Location.** Host them in places that are relevant to the problem you're addressing or people you want to serve.
- **Timing.** Make sure to offer the event at different times (lunch hour, evenings, on the weekend) to maximize the diversity of your audience. It's a chance to get a wide spectrum of viewpoints, insight, and feedback on the problem you're addressing.
- **Facilitator.** We suggest hiring a professional facilitator for these

meetings, ideally one that has expertise hosting events with people from all different backgrounds. We want all ideas and voices heard in these roundtable sessions. Having a facilitator also allows you (the host) and your advisor committee to be fully present and listen to the conversations taking place.

• **Notes.** Have someone on your team take notes so that later you can analyze the data collected.

• **Feedback.** In-person meetings are great for getting valuable feedback from the extroverts, but we also want to give those who are less comfortable with that setting a chance to speak up. After each roundtable discussion, pass out feedback cards so that people can write and submit their thoughts as well. You can also post these feedback cards online to gain even more insight.

After the roundtable discussions, be open to making adjustments to not just the wording of the question, but the overall process, the people involved, and the theme or location. Use the feedback you heard to make the Challenge better. If someone was particularly vocal and engaged at the roundtables, consider asking them to join your team as an advisor/judge, an outreach coordinator, or to apply to the Challenge with their idea.

Finalize the Question

After you have collected and synthesized all the research, data, and feedback, you are ready to finalize the Challenge Question. We have found that wordsmithing the question is a hugely important step in the process.

We've learned that if the question is too narrow, then you may not get a lot of applications, but if it's too broad, the ideas might lack creativity. Restraints and qualifiers can help you get better solutions. Test out sample versions of the question at the roundtables. See how people react to the words you're using. Is it inspiring? Is it framed in a positive light?

DESIGN THE CHALLENGE

With your question finalized, you're ready to start crafting the message and setting up the nuts and bolts for the Challenge. Your advisor committee should be there every step of the way to help you collectively make decisions for the Challenge.

The Nuts and Bolts

Decide on a Timeline
The Challenge happens in three phases: planning and outreach, call for applications, and project implementation. From start to finish, this process can take anywhere from six to nine months to complete, but ultimately the timeline is up to you. It will depend on your capacity, the activities you decide to do, and the community's needs. Check out our Challenge Process and Timeline to get an idea of how much time you'll need to spend on each phase and the activities involved.

Develop the Brand and Messaging
A huge part of designing the Challenge is the actual visual design. We know that people are much more likely to apply if the Challenge is well-designed, user-friendly, and the message is clear. Below are some resources that you can use to help design your Challenge. To get the right overall look and feel—investing in a designer is well worth it. When hiring, always look first to support designers in the area or community you're working in.

- Postcard Template
- Poster Template
- Social Media Share Graphics
- Press Release Templates

Create the Application
We always make our application available online and in a printable paper format for those less comfortable with technology. You can check out this Challenge Application as an example to help you build your own. We use an online platform called Submittable. It is very user-friendly, and you can easily print the application directly from Submittable for times you need a paper version. Another benefit of Submittable is that the judges can score the submissions online. While there are many ways to collect applications (Google Forms, Typeform) – we highly suggest making the application easily scorable for your judges. Here's the Scoring Rubric we used.

Create a Landing Page
There needs to be one consistent place online that people can go to get all of the information they need and a link to the application. There are several options for this, though. You can build a stand-alone webpage for the program, have a page dedicated to the Challenge on the website of the host organization, or simply start

a Facebook event that can serve as the go-to place for information. There is no right answer, and you can choose what works best for your team and your community. Use this Challenge Website Copy as a starting place. We typically update the original website copy after the winners are chosen with short descriptions of each team and their project.

Get People Inspired

Research example projects
For every Challenge, we create a Pinterest Board full of fresh ideas and projects from other parts of the world that can serve as inspiration for people's applications. We don't mind if people copy an idea and bring it to our city. There is no need to reinvent the wheel. We've also found that the Pinterest board helps people wrap their heads around what kind of projects the judges want to see.

Plan the Kickoff Event
We always get excited about planning an event that will both highlight the problem and inspire people to come up with new ways for our community to address this issue. We time our Kickoff event so that applications open that night. It creates momentum and gets people excited. Here are a few ideas to keep in mind about planning and hosting your Kickoff event:

- **Timing.** Learn a little bit about when your target audience is most available and plan accordingly.
- **Personal Invitations.** Send out personal invitations to groups that will represent voices from that community. Have your advisor committee also invite their networks.
- **Think Local.** Book a venue and hire vendors that are from the neighborhood you are working in, or who support the issue that you are trying to solve.
- **Representation.** Make sure that your panel, speakers, and emcee are all representative of the neighborhood you seek to serve.
- **Inspire.** Find creative ways to help people brainstorm potential project ideas for the Challenge question at the event. It's a great way to start drumming up inspiration.

NOTE: This event can be scalable depending on your budget. It can be as simple as a small community gathering where you announce the event, to a much larger production. The point is to get people fired up, and there are many ways to do that. In the past, we've

brought in national speakers for a Speaker Panel, hosted a Bike and Walking Tour, had a Lunch-Hour Field Day, and hosted a "Reverse Pitch" where nonprofit leaders pitched their biggest problem to the crowd.

With your Challenge designed and your plan in place, it's time to put out the call for ideas. To make sure that you get ideas from all different types of people – you need to be intentional with your outreach plan and communication tactics.

CALL FOR IDEAS

Communications and Outreach

Part of the reason why participatory grantmaking works so well is that the same people you want to engage with your program are a part of its creation and therefore feel ownership over the work you've done together. This method makes outreach a continuous part of the Challenge process rather than additive. You've been building community buy-in since you began the conversation at the Roundtables, interviews, and with your advisor committee. Now is the time to double down on the relationships built and work the connections to bring in as many applicants as possible.

Make an Outreach Plan
To get a swell of applications, you need to be intentional about getting the word out there and making sure it's shared through multiple outlets to reach lots of different people. Below are a few ways to get the word out:

- Really think about where you hang posters and challenge yourself to get outside of the usual places, and into areas where you might reach someone new. Having outreach coordinators who are from the community you are trying to engage makes this easy.
- Distribute postcards to partnering organizations, places where the people you want to apply spend time, and give them to your advisory committee to share with their networks.
- Present at local community groups and neighborhood meetings.
- Promote the Challenge through traditional media outlets, TV, radio, etc.
- Send out a Press Release.
- Have your advisory committee and stakeholder lists share the Challenge with their audiences through a personal

invitation to apply. Ask them to think of at least five specific people who they think might have a good idea and personally encourage them to complete an application.

Make a Communications and Social Media Plan

Your plan should include ways to drum up excitement in the weeks leading up to the kickoff event, inviting and sharing the application throughout the entire month they are open, and celebrating the winning projects in the weeks that follow. Check out this Communications Plan as an example.

Get Applications

Open Applications
We typically keep applications open for one month and leave space to extend the deadline by a week or so if we need to. We found that most people apply at the last minute, so don't get too worried if the application number seems low for most of the month. We put our applications online via Submittable, have paper copies available at our office, and a printable PDF version of the Challenge Application on our website as well.

Office Hours
Once a week, we dedicate an hour or two for people to drop by with questions on their applications. Since we have a panel of community judges (rather than Causeway doing the judging), we are able to give honest feedback to applicants and help them improve their idea and their application. Consider the location you host your office hours. It can be a good idea to host the sessions in a different part of town that might be more convenient for residents that would consider applying.

EMPOWER LEADERS

Select the Winning Projects

The advisor committee that you've been communicating with from the beginning becomes your judging panel. We usually try to have about 10-12 people on board, making sure that they represent every facet of the community you are working in. The number of judges and the process you use here is up to you, but as an example, this is how we do it:

• All judges score the applications independently. They have

one week after the applications close to judge and submit their scores online. We use Submittable and this Judging Rubric. So that each application is judged fairly, we also ask that judges opt-out when they have a conflict of interest with one of the applicants. It can get tricky in close-knit communities. Simply knowing an applicant may not be a conflict of interest, but, if the applicant is a close friend, family member, employee, or coworker, the judge should recuse themselves from scoring that application. It will not hurt their overall average. In Submittable, you can also hide the applicant's name and demographic information to reduce bias.

- After the judges have submitted their scores, we meet the following week to discuss the top 20 - 25 applications and any notable mentions in person. It gives people the chance to explain their scores and the opportunity to fight for their favorites. It is always a lively and exciting conversation that we feel leads to the best projects being chosen. Be sure to pay attention to any outliers. Is there an application with an exceedingly high or low score from one judge that is impacting their average? Talk about it. At the end of that meeting, we have our winners!
- First, the winners are notified by phone to make sure they are still interested. Next, the applicants who were not selected are notified by email thanking them for sharing their idea and offering more resources for ways they can continue working on it. And finally, the winners are announced to the public. We usually publish a list of project names and descriptions on social media, our, and in a press release.

Measure Leadership Development

The Challenge is a leadership development program that results in fresh ideas and powerful community leaders. To measure the success of your program, you will want to survey participants at the beginning and the end of the Challenge. Upon winning the grant, we give each project leader a Pre-survey to complete and then a Post-survey at the end of four weeks of incubation. It helps us measure not only the impact of the project but also the growth in their ability and confidence to lead. Our survey questions are directly related to the concepts we teach during the four week incubation period. If you teach a different curriculum or do not teach a class at all, you'll want to adapt your survey.

Guide Them Through the Pilot

This can look many different ways. We have done everything from simply handing them the grant money and checking in occasionally – to a full nine-week class with hands-on curriculum culminating in a pitch night. From our experience, the sweet spot was a weekly meetup for one month to iron out the details of their pilot program, followed by five months to execute their project fully, where you are just standing by for support when they reach out. Repeatedly, we saw that the best outcomes of the weekly meetups were the relationships they built with their peers and the ways they supported each other. Even if you decide to do no curriculum with the group — a chance for them to meet up and support each other will go a long way!

You are welcome to use our Pilot Guide to help your Challenge winners get their projects off the ground.

Measure Success, Refine, Share, and Grow

When the projects finish, we send a Final Report to get a final evaluation of their growth as a leader and the project's impact on the community. Each project is different in the end. Some realize that they need to rethink their idea altogether, some need to make a few tweaks, and some are off to the races ready to step up. We try to meet each project where they are, helping to guide them and connect them to local resources to support whatever their next step may be.

The Results

Throughout our seven Challenges, our participants have shown that they feel 30% more equipped as a leader and 24% more confident in their ability to plan, develop, and launch community projects.

One interesting takeaway is that we consistently see a dip in their confidence right after they receive the grant and start working on their project. The reality sets in, and they realize this kind of work can be really difficult. This is normal, and anticipating it can help make it less of a burden. Do something to help your project leaders reconnect to the reason they wanted to do this in the first place, keeping them inspired.

One project leader told us that four years after receiving his Challenge grant that the $2500 we had given him had allowed him to show a need and prove his case, and that it had led to over a million dollars of investment from multiple foundations. We have had several repeat Challenge winners who got a taste of this kind of work and came up with bigger and better ideas each time. We have seen small, innovative ideas led by one individual get adopted by big nonprofits where they have the support they need to be sustainable. We have seen leaders win a Challenge, and go on to quit their job to pursue their cause full time. Most importantly, we have seen countless people who were not super involved in their community before applying with an idea, move on to become active leaders in their community by holding neighborhood leadership positions, starting PTAs at their schools, and even being elected to public office.

The Challenge can be a powerful tool to invest in a place, fund creative ideas, and elevate new leaders. We are so excited to see what you can do in your community with this tool.