



# PREPARATION AND PLANNING GUIDELINES

Laying a strong foundation is essential for successful collaboration. These guidelines and parameters outline the key elements of the Collaboration Grants process, including defining the purpose, principles, and approach that shaped the funding framework. Developed by the Advisory Committee, these resources provide insight into the participatory process that guided how collaboration groups were formed and how their initiatives were defined.

## GUIDELINES TO IDENTIFY THE PURPOSE, PRINCIPLES, APPROACH, AND FUNDING PARAMETERS

The Advisory Committee, comprising five women's funds, two foundation representatives, and a Prospera Secretariat member, designed and guided the Collaboration Grants process. While the Collaboration Grants outcomes were clearly defined in Fenomenal Funds' strategic plan, the process of how we would achieve it was a task for the Advisory Committee, which held responsibility for our participatory grantmaking. In this capacity, the Committee did more than just review and recommend grants for approval; it also developed a comprehensive framework and process for the grants. This process delineated how the women's funds would define the initiatives for which they seek funding and determined their collaboration partners. The development of this framework also required clarifying the purpose (the "why"), establishing the principles and approach (the "how"), and setting the funding parameters (the "what") of the grants.

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### PURPOSE

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The purpose articulates why you are facilitating this process. Clarifying the "why" helps anchor the group's intentions and ensures alignment throughout the process. It serves as a guiding reference point, helping to maintain focus and direction as the group collectively moves forward.

When we defined the purpose of the Collaboration Grants, it focused on what we hoped the process would create among the women's funds, how that would make a difference, and the "so what?"—what the ecosystem would be able to do if it was more resilient. We also allowed for emergence: for the process to result in unexpected changes that would benefit not just the women's funds but the gender justice movements that the women's funds exist to support. The purpose defined a North Star that would set our line of sight on the ultimate impact, i.e., a resilient feminist funding ecosystem and not just short-term results.

## Guidance

- **Prompt** each member of the planning group to specify the “why” for this funding and how it connects to the vision for the initiative. Use a short and focused set of guiding questions:
  - Why do we want to facilitate collaboration among these groups/organizations?
  - What does meaningful collaboration look like? What would make meaningful collaboration possible in this context?
  - What is the change that we hope for? Why does that change matter?
  - If this change happens, what becomes possible?
  - How does this advance the larger vision?
- **Give** people time to consider the questions based on their understanding of the vision. Invite each person to share their contribution, revealing not just their response to the question but their thinking behind their response.
- **Summarize** what you hear from each individual. Pull out any themes that you see across responses and invite others to share their observations.
- **Craft** a purpose based on the themes.
- **Continue** to iterate through a process of review, feedback, and edits to reach a final purpose statement that captures the wisdom of the collective.

## Practice

Use the purpose as a touchstone. When orienting individuals and groups who are part of the process, start with the purpose. When there are decisions or choices to make in the “how” part of the process, check if they will support the movement toward their goals. Overall, the purpose steers the rest of the components of the process, including the “what” and the “how.”

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## PRINCIPLES

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If the purpose serves as the North Star, the principles are the guide to get there. They will shape the process and, thus, the experience that participants have as they engage in your Collaboration Labs.

When the Advisory Committee came together to define the process that would support the women's funds to form their Collaboration Groups and decide what to work on, they started by articulating the experience they wanted the women's funds to have. This articulation was translated into a set of principles to guide the vision for the overall process. The principles served as a guide for everything we did and how we did it: They set an intention and acted as guardrails in the design process.

Our Collaboration Lab principles:

1. Courageous/brave spaces that support radical imagination
2. Reflexive praxis that supports learning and engagement
3. Space and time for connecting, dreaming, and planning together
4. A responsive, flexible, and inclusive process
5. Building the collective capacity of women's funds
6. Raising the visibility and voice of women's funds
7. Supporting the collective care of the community

### Guidance

- **Invite** each person to think about the people and organizations participating in the process. Invite them to think about, write down, and then share a description based on this set of prompts.
  - What experience do you want people to have?
  - How do you want people to feel?
  - What are the most important attributes of the process?
  - What kind of practice should be part of the process?
  - What would a successful process look like?
- **Ask** each person to share their responses. Break into small groups to observe and synthesize the themes emerging from the contributions. Facilitate sharing in the larger group, making space for input from everyone.
- **Summarize** the responses and the group's reflections. Articulate in a series of statements that can serve as guiding principles.
- **Review** the responses, summary, and proposed statements, inviting comments about what resonates, questions people have, and suggestions to improve or refine. Iterate through a process of review, feedback, and edits until the group reaches a shared agreement.

## Practice

The principles should serve as a point of reference as the process is defined: a lens through which you check if the process is aligned with the experience that you want participants to have.

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## APPROACH

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The overall approach of the Collaboration Labs—defined by three phases of “Discover,” “Define,” and “Refine”—served as the road map for operationalizing the process. It took into account the common challenges that get in the way of creating meaningful collaboration and curated the space that supported the women’s funds to develop relationships, co-create the plan of action, and define ways of working that would help overcome those challenges.

An iterative participatory process made it possible to define the overall approach of the Collaboration Labs and drew on the diverse experience and imagination of our Advisory Committee. Fenomenal Funds supported the women’s funds to develop meaningful collaboration by curating and holding space for the women’s funds to discover, define, and refine the work they wanted to do together and how they would do it. The Collaboration Lab process was shaped by an understanding that collaboration takes time, requires trust, and needs resources. This meant that the process had to proceed in stages: facilitating group formation, finding common areas of interest, and co-creating the process of working deeply on the topic of shared interest.

## Guidance

- Divide the planning committee into two working groups. Provide a month for each working group to develop one component of the approach. Potential guiding questions to support the process include the following:

Connecting	Planning
<ul style="list-style-type: none"> <li>● What conditions are necessary to support participants to get to know each other and connect?</li> <li>● How will participants discover their shared interests and common challenges?</li> <li>● What support will participants need to decide if they want to work together?</li> <li>● What should the groups decide at the end of this process? What information should they share?</li> <li>● What is the mechanism for review and approval of the collaborations?</li> </ul>	<ul style="list-style-type: none"> <li>● What will it take to support participants to develop a shared plan around an agreed-upon topic?</li> <li>● What do they need to work on to set them up for success?</li> <li>● What barriers might pose challenges to collaboration? What tools or processes can they define to help overcome these?</li> <li>● What will they share to communicate their plan?</li> <li>● What are the criteria for plans to be funded?</li> </ul>

- Working groups share their ideas with the whole group. Members review the document—making comments, adding suggestions, or asking questions—and bring it to the next meeting. During the meeting, questions, clarifications, concerns, and additional suggestions are incorporated into the proposals from working groups.
- Based on the discussion, working groups revise their proposal and share it again with the whole group. During the final meeting, any final comments and clarifications are reviewed.
- Before each component is finalized, the group reviews how the parts are connected, whether they move the participants toward the North Star, and whether the design shapes the experience articulated by the guiding principles.

## Practice

The approach sets up the framework for how participants get to know each other, decide their topics of focus, and define their plans, which they will submit for funding. A clear process sets up the participants for co-creating a meaningful collaboration.

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## FUNDING PARAMETERS

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Funding parameters are important for everyone involved. They help to define clear expectations for those applying for funding and those reviewing applications. They also give participants the chance to ask clarifying questions so they can work in ways that align with the funding opportunity.

We established the funding parameters through a collaborative process involving the Steering and Advisory Committees. The Steering Committee first outlined broad expectations and guiding principles, creating a foundation for more detailed discussions. The Advisory Committee then focused on defining specific eligibility criteria, grant sizes, collaboration timeframes, and participation limits. This two-tiered approach ensured that funding parameters aligned with both strategic objectives and practical implementation considerations, and that both committees had a shared understanding of the parameters before the funding opportunity was formally launched.

### Guidance

Facilitate a discussion guided by the following questions:

- What are the eligibility criteria for the Collaboration Grant?
- What grant size can groups request?
- Does this depend on group size or work scope?
- What is the length of the collaboration?
- How many collaborations can organizations be part of?

### Practice

This is usually the first thing that participants will want to know. Start here when sharing information about the collaboration opportunity. It allays fears of engaging in a process and not having enough resources to carry out the vision. When there is clarity, it gives people the opportunity to be creative within the defined parameters. Below are the Collaboration Grant parameters that we used.

## Tools and Resources Index

Preparation And Planning Guidelines  
Collaboration Grant Parameter  
The Collaboration Labs Guidelines: Discover, Define, Refine Phases  
Women's Funds Survey to Identify Collaboration Topics  
Women's Funds Participation Guidelines  
Advisory Committee Review Discussion Guide  
Discover Phase: Collaboration Topic Description  
Define & Refine Phase: Collaboration Grants Plan  
Define & Refine Phase: Collaboration Grants Budget Guidelines  
Facilitator And Documenter Guideposts  
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Refine Phase Reflection Questions  
Supporting The Collaborations  
Fishbowl Session Example  
Reflecting And Learning  
Learning Conversation Example

Please visit the Fenomenal Funds website for more tools and resources:

<https://fenomenalfunds.org/grantmaking/collaboration-grants/tools-resources>