



International Grantmaking to Help Underserved and Marginalized Communities:

*A Review of Principles
and Strategies for Funders*

Authors

Jocelyn Marrow | Cindy Gruman | Niyati Shah | Nile Campbell

Project Director

Allison Hyra

Project Officer

Tara E. Martin

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U.S. Department of Labor
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200 Constitution Avenue NW
Washington, DC 20210

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Westat, Inc.
1600 Research Boulevard
Rockville, MD 20850

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Contents

	What's Inside?	iv
1	Introduction and Overview	1
2	Background	4
	A. Federal Commitment to DEIA	4
	B. The Federal Grant Life Cycle	6
3	Data Collection Methods	7
4	Findings	9
	A. Guiding Principles in Funders' International Efforts	9
	I. U.S. Government Definitions	9
	II. Challenges with Applying DEIA Terminology Globally	11
	III. Definitional Similarities and Differences Across Funders	12
	B. Equity in the Funder-Awardee Relationship	15
	I. Conventional and Trust-Based Grantmaking	16
	II. Participatory Grantmaking	17
	C. Preaward and Application Stages	19
	I. Funding Announcements	19
	II. Indirect Funding	20
	III. Application Processes	21
	D. Project Design and Implementation	22
	I. Project Design	22
	II. Project Participants	23
	III. Inclusion Strategies	24
	IV. Ongoing Project Course Correction	25
	V. Avoiding Harm	26
	E. Monitoring and Evaluation	27
	I. Indicators	27
	II. Data Collection	28
	III. Questions on Race and Ethnicity	29
	IV. Toward a Better Model	30
	V. A Note on Qualitative and Participatory Research	32

5 **Conclusions and Emerging Practices**..... **33**

Appendix A.
Example Resources and Tools for Funders **36**

Appendix B.
Data Collection Methods..... **38**

Appendix C.
Environmental Scan and Literature Review References **42**

Appendix D.
In-Depth Interview Protocol..... **50**

Appendix E.
Endnotes..... **52**

What's Inside?

What's in this report? This report defines principles and describes strategies for helping underserved and marginalized people through international grantmaking. Our research on this topic includes a review of publicly available reports, measures, academic literature, and in-depth interviews with representatives of funding bodies, including Federal departments and agencies, U.S. philanthropic institutions, and multilateral organizations. We explain how funders define important principles underpinning efforts to improve the circumstances of underserved and marginalized populations in international contexts and how they implement these principles in preaward and postaward project phases.

Why focus on people who are underserved and marginalized in international grantmaking?

In 2021, the White House issued the *Executive Order on Advancing Racial Equity and Support for Underserved Communities Through the Federal Government*, which required Federal agencies to focus on equity for underserved communities.¹ Focusing on equity and related principles throughout the grantmaking life cycle can help engage the most marginalized and underserved community members targeted by grantees' programming. Including marginalized and underserved people in programming can increase community integration and improve overall community outcomes.²

Who should read this report? Funders who wish to learn how they might better reach and help underserved and marginalized international communities through grantmaking — or contracting — may benefit from reading about other funders' experiences, challenges, and tools. Because international funding organizations vary by size, policy area, scope, and world area, funders can tailor these findings and suggestions to meet their contexts and goals.

Where do these ideas come from? We reviewed publicly available materials about grantmaking in international contexts, beginning with the White House's *Executive Orders*. We included public, private, and multilateral funding organizations' statements on commitment to underserved and marginalized communities and guidelines for project implementation, monitoring, and evaluation, among other materials. We also included relevant scholarly literature. Finally, we interviewed staff from two Federal agencies, one multilateral organization, three philanthropic institutions, and one nonprofit.

How do I use this report? The *Findings* portion of the report (Section 4) is organized chronologically according to phases of the grantmaking life cycle: preaward through postaward monitoring and evaluation with additional chapters on definitions of important principles and funding models. We recommend readers unfamiliar with the grantmaking life cycle begin with *The Federal Grant Life Cycle* (Section 2, Subsection B). Readers interested in a specific phase may skip to the phase of interest. For a discussion of important concepts and principles relevant to grantmaking for marginalized and underserved people, see the *Guiding Principles in Funders' International Efforts* (Section 4, Subsection A). To learn about predominant styles of contemporary grantmaking, read *Equity in the Funder-Awardee Relationship* (Section 4, Subsection B).

1

Introduction and Overview

In a series of executive orders signed in 2021, the White House tasked Federal agencies with increasing commitment to diversity, equity, inclusion, and accessibility (DEIA).^{3,4,5} As a result, Federal agencies that make awards domestically and overseas ramped up efforts to integrate DEIA principles into all activities, including contracting and discretionary grantmaking. Federal agencies are working to ensure their awardees' programming is inclusive and accessible and reaches marginalized and underserved communities equitably, thereby increasing the diversity of program participants. Beginning in October 2024, incorporating attention to marginalized and underserved communities in grantmaking will become Federal regulation.⁶



These undertakings are not new: Efforts to identify, engage, and empower the most marginalized and underserved communities of the Global South predate this recent focus on ameliorating inequities.⁷ However, the White House’s recent executive orders offer an opportunity to reassess challenges and strategies for ensuring the benefits of Federal money are received equitably at home and abroad.

DEIA is terminology that emerged from specific U.S. historical, cultural, and institutional contexts, so challenges emerge when using it to address inequality outside the United States. The values driving movements for civil rights, women’s rights, disability rights, and LGBTQ rights, among others, preceded the development of DEIA in the United States. DEIA now addresses recognition of the rights of previously excluded categories of people for inclusion and protection in U.S. workplaces, schools, corporations, and other institutional contexts.

Currently, Federal agencies and some U.S. philanthropic institutions funding projects in the Global South are interested in applying DEIA-related principles to their grantmaking.⁸ Our review shows many funders use additional terms to describe their goals for including members of underserved and marginalized populations in projects funded by awardees. Therefore, we introduce some of the alternative terminology that Federal funders, U.S. philanthropic institutions, and multilateral organizations have developed to further encompass the experiences of those outside the U.S. context.

The Department of Labor’s (DOL) Chief Evaluation Office, partnering with the Bureau of International Labor Affairs (ILAB), commissioned Westat to explore current approaches to increasing and measuring DEIA in international grantmaking. This report supports DOL in strengthening their commitments to DEIA and related principles through discretionary grantmaking in international contexts. We hope it may also be useful to other organizations—governmental, nongovernmental, and multilateral—seeking to forge their path to better serving marginalized and underserved participants in international grantmaking.

Equity in Grantmaking: A Review of Barriers and Strategies for Funders Considering Improvement Opportunities,

also produced by Westat, is a partner document to this report. It describes strategies for overcoming challenges with increasing equity in domestic grantmaking.

Streeter, S., Giordano, S., Hyra, A., & Shah, N. (2024). *Equity in grantmaking: A review of barriers and strategies for funders considering improvement opportunities*. Westat. <https://www.dol.gov/sites/dolgov/files/OASP/evaluation/pdf/ADRA-ETA-Equity-in-Grantmaking-Review-of-Barriers-and-Strategies-for-Funders.pdf>

To explore approaches to increasing and assessing DEIA and related values in international grantmaking, we conducted an environmental scan of current practices for incorporating DEIA and related values into pre- and postaward phases as described in the reports, documents, and websites of other Federal organizations, foundations, and multilateral organizations. Simultaneously, we reviewed the scholarly and independent literature pertinent to DEIA and related principles in international grantmaking, focusing on strategies for reaching underserved and marginalized communities. We also conducted in-depth interviews with representatives of Federal organizations, foundations, and multilateral organizations to learn more about their efforts to enhance commitment to DEIA and related principles in international funding. The following questions guided this study:

- **Defining DEIA in grantmaking:** How do Federal agencies, foundations, and multilateral international development organizations define DEIA for the international contexts where they fund projects?
- **Barriers to DEIA in grantmaking:** What obstacles impede funders’ integration of DEIA and related principles into preaward funding announcements and solicitations, as well as postaward project design, monitoring, and evaluation? What barriers do awardees encounter when attempting to reach and serve marginalized communities and their members?

- **Making DEIA goals feasible in complex local contexts:** What strategies enable funders and awardees to incorporate DEIA and related principles into projects in locally relevant and responsible ways?
- **DEIA best practices:** What are the best practices for applying DEIA and related principles in funding and implementing projects in international contexts?

Section 2, **Background**, provides the context for the U.S. Government’s renewed commitment to DEIA. It describes specific activities within the grantmaking cycle that ILAB has already implemented in attempts to increase DEIA and begins an exploration of further possibilities for applying a DEIA lens at phases within the grantmaking cycle.

The **Data Collection Methods** section describes our three-pronged data collection plan, including the following:

- An environmental scan of funders’ publicly available materials describing methods and aspirations for DEIA in their funding activities
- In-depth interviews with representatives of foundations, Federal agencies, and multilateral organizations with commitment to DEIA-related values that provide international grants. These interviews named barriers to adapting DEIA and related principles in grantmaking, strategies for overcoming barriers, and methods for monitoring and evaluating the participation of members of underserved and marginalized communities in funded projects
- A review of the literature to evaluate, critique, and provide historical and social context for the funding and implementation of projects to improve labor, human rights, and health of marginalized and underserved communities

Within Section 4, **Findings**, Subsection A, **Guiding Principles in Funders’ International Efforts**, examines definitions from the original documents signed by President Biden in 2021 and subsequent conceptualizations by various Federal departments and agencies. We also consider how private foundations and multilateral organizations that fund international projects address DEIA and related principles in their grantmaking. Subsection B, **Equity in the Funder-Awardee Relationship**, discusses types of grantmaking as discussed through our review. Subsection C, **Preaward and Application Stages**, describes strategies and tools funders have used to solicit applications incorporating DEIA and related commitments into project design. Subsection D, **Project Design and Implementation**, describes barriers to creating and executing projects responsive to and inclusive of marginalized communities. This section describes strategies and tools for creating robust project plans that include members of marginalized communities and for successfully reaching them without causing harm. Subsection E, **Monitoring and Evaluation**, describes metrics, indicators, and data collection processes for assessing the inclusion and empowerment of marginalized and underserved community members. Section 5, **Conclusions and Emerging Practices**, proposes recommendations to better serve marginalized and underserved communities through international grantmaking.

2

Background

A. Federal Commitment to DEIA

Hours after taking office in 2021, President Biden signed the *Executive Order on Advancing Racial Equity and Support for Underserved Communities Through the Federal Government*.⁹ Responding to an American racial justice movement that had garnered unprecedented support the previous summer,¹⁰ the Biden Administration called for Federal agencies to eliminate systemic barriers to equal opportunity that Federal agencies' policies and programs might be sustaining. Federal entities were to conduct internal assessments and take corrective actions to eliminate barriers that made it difficult for underserved community members to enjoy the full benefit of U.S. policies and programs. The Biden Administration urged intervention to end inequitable access to Federal services and programs and remedy inequitable access to Federal agency procurements and contracts. Examining how Federal agencies might further promote the civil rights of marginalized and underserved communities by applying resources toward advancing equity in society more broadly was another goal of this executive order.

The *Advancing Racial Equity* order also called for the participation of members of underserved communities in these efforts. It required collecting data that could be disaggregated by characteristics such as race, ethnicity, gender, gender identity, sexual orientation, and disability status so Federal agencies could measure the outcomes of any future changes.

The White House’s subsequent *Memorandum on Advancing the Human Rights of Lesbian, Gay, Bisexual, Transgender, Queer, and Intersex Persons Around the World* signed February 4, 2021, and the *Executive Order on Establishment of the White House Gender Policy Council*, signed March 8, 2021, explicitly referred to advancing LGBTQI and gender equality globally.¹¹ The *Executive Order on Further Advancing Racial Equity and Support for Underserved Communities Through the Federal Government* of February 16, 2023, includes a commitment to advancing equity “around the world” through “foreign policy and foreign assistance.”¹²



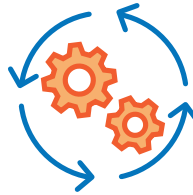
B. The Federal Grant Life Cycle

This study aims to determine the best ways to increase attention to DEIA and related principles in grantmaking activities with a focus on Federal agencies funding international labor and development projects. Therefore, it is helpful to examine phases within the grantmaking cycle¹³ to identify the potential for incorporating DEIA and related principles.

The grant life cycle (exhibit 1) can be described briefly in four stages. The first stage is preaward and requires that the funder design the opportunity and navigate the submission process. Planning includes assessing the feasibility of the opportunity and drafting the call for applications. The second stage involves soliciting applications, providing information to potential applicants for navigating the process, and collecting the applications. An intermediate stage calls for reviewing applications and making decisions about which applicants to award. After the award, the funder helps implement the funded project and monitors and evaluates progress and outcomes. Processes to close out the grant are also included in this stage.¹⁴

DOL requested our inquiry focus on how to best incorporate DEIA and related principles into two phases of the grantmaking cycle. One phase of interest is the preaward phase, when planning the project to best address marginalized and underserved communities. The other phase of interest is the postaward stage of project design, technical assistance, and monitoring and evaluation. While we include discussion of the collection of applications and funding of awards, we suggest seeing our partner document, *Equity in Grantmaking*,¹⁵ for more extensive discussion of grantee selection in domestic contexts.

Exhibit 1. The Grantmaking Life Cycle



Preaward

- Plan grant opportunity
- Draft funding opportunity announcement



Collection of Applications

- Reach out to potential applicants
- Provide technical assistance to applicants
- Collect applications



Selection of Awardees

- Review applications
- Select organizations to award



Postaward

- Respond to applicants
- Monitor and evaluate awardees
- Provide technical assistance to awardees

3

Data Collection Methods

The purpose of this study is to examine the work of grantmakers funding labor and development projects in international contexts to inform efforts to further integrate DEIA and related principles into their grantmaking. Under the DOL Chief Evaluation Office's guidance, we aimed to focus on the most effective ways of encouraging awardees working in development, human rights, labor, and social justice to prioritize inclusion and equity for local communities that are marginalized and underserved.



Data collection included three iterative processes as follows:

- A review of funders' (U.S. governmental, U.S. private foundations, and multilateral development organizations') publicly available materials presenting aspirations and methods for DEIA in funding activities
- In-depth interviews with representatives of Federal agencies, U.S. foundations, and multilateral organizations funding labor, development, and social justice projects in international contexts
- A review of the literature to evaluate, critique, and provide historical and social context for the funding and implementation of projects to improve labor, human rights, and health of marginalized and underserved communities.

Appendix B provides an in-depth discussion of these three processes and the methodological limitations of this study.



4

Findings

A. Guiding Principles in Funders' International Efforts

I. U.S. Government Definitions

The White House's January 20, 2021, *Executive Order on Advancing Racial Equity and Support for Underserved Communities* required all Federal agencies to implement the White House's objectives regarding equity. Within 200 days of signing of the order, each Federal agency was expected to assess whether any underserved groups were experiencing systemic barriers to accessing Federal programs and Federal business or grant opportunities. This *Executive Order* defined "equity" and "underserved."¹⁶



The other three components of DEIA—diversity, inclusion, and accessibility—are defined in the subsequent *Executive Order on Diversity, Equity, Inclusion, and Accessibility in the Federal Workforce*.¹⁷ See below for the definitions provided by these *Executive Orders*. Fittingly, Federal departments and agencies, including the Department of Health and Human Services, DOL, the U.S. Department of State, the National Institutes of Health (NIH), and ILAB have used these definitions in their subsequent DEIA strategic plans, Equity Action Plans, Funding Opportunity Announcements (FOAs), Requests for Proposals (RFPs), and related materials.¹⁸

The White House’s Definitions of DEIA and Underserved



- **Diversity:** “The practice of including the many communities, identities, races, ethnicities, backgrounds, abilities, cultures, and beliefs of the American people, including underserved communities.”



- **Inclusion:** “The recognition, appreciation, and use of the talents and skills of [people] ... of all backgrounds.”



- **Equity:** “The consistent and systematic, fair, just, and impartial treatment of all individuals, including individuals who belong to underserved communities that have been denied such treatment, such as Black, Latino, and Indigenous and Native American persons, Asian American and Pacific Islanders and other persons of color; members of religious minorities; LGBTQ+ persons; persons with disabilities; persons who live in rural areas; and persons otherwise adversely affected by persistent poverty or inequality.”



- **Accessibility:** “The design, construction, development, and maintenance of facilities, information and communication technology, programs, and services so that all people, including people with disabilities, can fully and independently use them.”



- **Underserved:** “The term ‘underserved communities’ refers to those populations as well as geographic communities that have been systematically denied the opportunity to participate fully in aspects of economic, social, and civic life.”

Note: “Underserved” and Equity” definitions are from Biden, J. R. (2021). *Executive Order on Advancing Racial Equity and Support for Underserved Communities through the Federal Government*. U.S. White House. <https://www.whitehouse.gov/briefing-room/presidential-actions/2021/01/20/executive-order-advancing-racial-equity-and-support-for-underserved-communities-through-the-federal-government/>. “Diversity,” “Inclusion,” and “Accessibility,” are from Biden, J. R. (2021). *Executive Order on Diversity, Equity, Inclusion, and Accessibility in the Federal Workforce*. U.S. White House. <https://www.whitehouse.gov/briefing-room/presidential-actions/2021/06/25/executive-order-on-diversity-equity-inclusion-and-accessibility->

Consistent with the White House’s commitments to DEIA, all Federal departments and agencies’ DEIA strategic plans reviewed for this study¹⁹ stated their renewed commitment to implementing DEIA principles. This commitment included attention to DEIA among the following groups: (1) Federal workforce employees; (2) domestic policies and programs related to program participants; and (3) U.S. businesses and nonprofits awarded Federal grants, cooperative agreements, and contracts. Those Federal departments and agencies with overseas missions, including the Department of State, USAID,²⁰ the Fogarty International Center (FIC) of NIH,²¹ the Global Health Center of the Centers for Disease Control and Prevention (CDC),²² and ILAB,²³ provided support for DEIA principles in the planning and execution of global diplomacy and overseas programs.

II. Challenges with Applying DEIA Terminology Globally

As mentioned earlier, DEIA emerged within specific U.S. historical and organizational contexts. Landmark legislation beginning in the 1960s—particularly the Civil Rights Act of 1964, but also the Equal Pay Act of 1963, and the Americans with Disabilities Act of 1990—responded to the United States’ history of segregation of Black Americans and the exclusion of racial minorities, women, and people with disabilities from formal employment and formal education.²⁴ As the culmination of efforts to ensure equal rights, the linked principles of “diversity, equity, inclusion, and accessibility” guided the entry and protection of marginalized groups in U.S. institutions and workplaces.²⁵

Our review of materials from funders and from independent and scholarly literature, as well as our conversations with representatives of funders’ organizations, indicate some challenges utilizing these terms in international contexts. Nonprofit, academic, and other social justice

organizations located in the Global South have noted the lack of fit of DEIA terminology to relationships of power within local communities because power differentials and inequalities in foreign communities are unlike those within the United States.^{26,27} The Ford Foundation described the following experience of grantees from small, foreign, and locally situated social justice organizations in the Global South: “The framing of DEI ... as anchored in a US discourse around race does not directly translate into the discourses around exclusion and discrimination they are facing, i.e., primarily concerning ethnicity and the rights of indigenous peoples.”²⁸ Some scholars have argued that using DEIA terminology in foreign contexts may obfuscate the power relationships in the community by narrowing attention to markers of disadvantage salient in the United States.²⁹ They suggest the types of disadvantages at play in the local community, such as religion, language, caste, or poverty,³⁰ may receive less attention as a result.



“We tend to have far less information about social hierarchies and historical disadvantage than we do in the United States. We also don’t understand the nuances of the debates, or the legal issues related to discrimination in employment, sexual harassment, and other matters that we are more fluent with in our own context.”

Corona, L. (2020). Q&A with Leticia Corona: Learning with funders about diversity, equity, and inclusion in international grantmaking. <https://hewlett.org/qa-with-leticia-corona-learning-with-funders-about-diversity-equity-and-inclusion-in-international-grantmaking/>

International, multilateral organizations such as the United Nations (UN) rarely use DEIA terminology to guide their development efforts. (The UN includes the International Labour Organization [ILO], the United Nations International Children’s Fund [UNICEF], and the UN Conference on Trade and Development [UNCTAD]). Instead, the UN aspires to the Leave No One Behind (LNOB) principle as “a human rights-based approach to DEI.”³¹ LNOB is a plan for action as well as a principle; it calls for identifying which categories of people in a local community are the most marginalized and underserved; identifying the reasons for their marginalization (i.e., what circumstances have caused them to be the “poorest of the poor?”), exploring ways of making their circumstances equitable, and then acting on a plan to increase equity.³² The UN explicitly prioritizes assisting those populations first who are the “worst off.”³³

III. Definitional Similarities and Differences Across Funders



Federal agencies and the White House state that **diversity** is a goal for the Federal workforce, domestic grantees, and U.S. contractors’ staff. Federal agencies may implement diversity as a principle guiding their hiring and grantmaking to professionals in the Global South. We discovered two examples relevant to international contexts in our review: one in the United States Agency for International Development (USAID) materials and the second in NIH’s FIC grantmaking. USAID includes as a goal for their foreign Missions “hiring staff that represent the diversity of the country.”³⁴ FIC describes diversity as the desired composition of the biomedical research workforce (i.e., scientists and health services providers conducting biomedical research) of low and middle income (LMIC) countries. What constitutes

workforce diversity, according to FIC, depends on which populations are marginalized in the context of the home country, not what constitutes diversity in the U.S. context.³⁵ A recent FIC achievement is the development of Administrative Supplements to FIC’s Training Grants to Promote Diversity, Equity, and Inclusion.³⁶ These supplements are earmarked for minority and disadvantaged biomedical scientist citizens of LMICs.

In contrast to its salience as a principle guiding workforce composition, we found that diversity is mentioned less frequently as an aspiration for program participants in international development work (i.e., work “improving the lives of individuals worldwide ... [in] areas such as health, education, democracy, sustainability, and economics”³⁷). Exceptions include ILAB’s D&I statement and a jointly written plan of USAID and the Department of State. ILAB’s D&I plan promotes “diversity and inclusion ... in all aspects of human resources, operations, policies, and programs.”³⁸ The Joint Strategic Plan of USAID and the State Department describes diversity as the natural outcome of a commitment to advancing equity. According to the plan, the advantage of diverse societies is stable democratic governments, which, in turn, create a peaceful global order that is hospitable to U.S. national priorities.³⁹

The Open Society Foundations, a U.S.-based philanthropic institution, acknowledges some tension between the principles of diversity and those of inclusion and equity. While diversity may be a desired outcome of inclusion and equity, it may also exist without inclusion and equity. Diversity, according to the Open Society Foundations, is “intentional variation” among a group of people. Because “a diverse group is not necessarily inclusive or equitable,” they encourage attending to the representation of people who have been structurally discriminated against, oppressed, or otherwise disadvantaged.⁴⁰



Equity is a central DEIA principle in Federal materials and part of ILAB’s mission statement (see text box). The 2022–2026 Joint Strategic Plan issued by the Department of State and USAID declares that

“advanc[ing] equity, accessibility, and rights for all” is a component of their third goal: “Strengthen democratic institutions, uphold universal values and promote human dignity.”⁴¹ The beneficiaries of equity, as described in this plan are disempowered “marginalized people and communities.”⁴²



“ILAB’s mission is to strengthen global labor standards, enforce labor commitments among trading partners, promote racial and gender equity, and combat international child labor, forced, labor, and human trafficking.”

U.S. Department of Labor, Bureau of International Labor Affairs, (n.d.). *About*.
<https://www.dol.gov/agencies/ilab/about-us>

Similarly, equity—specifically, health equity—has been a central principle of CDC’s Global Center priorities since 2022.⁴³ By health equity, CDC refers to the goal of eliminating health disparities, including those determinants of health that disproportionately affect excluded and marginalized groups. According to the CDC, a health equity approach means prioritizing engagement with disadvantaged groups before engagement with more advantaged ones. This practice is a moral imperative and an efficient use of resources because the geographic locations with high disease burdens are inevitably home to the most underserved and marginalized.⁴⁴

U.S. philanthropic institutions highlight the importance of power in their definitions of equity. The Open Society Foundations refers to equity as the “achievement” of “address[ing] and dismantl[ing] imbalances in power dynamics (caused and upheld by structural systems of oppression and injustice) that are perpetuated in policies, processes, institutions, and the distribution of resources.”⁴⁵ Similarly, the Ford Foundation asserts, “Equity requires us to acknowledge the power imbalances and the unequal circumstances we all face. ... Each of us must actively work to remove barriers to everyone’s ability to participate and succeed.”⁴⁶

Gender equity, or equality, is a stated goal of much of the multilateral international development material.⁴⁷ Many international grantmaking organizations explicitly name gender as a starting point for addressing other categories of marginalization and disadvantage, including race, ethnicity, disability, gender identity, and sexual orientation. For example, a 2022 statement of ILO’s priorities describes its aspiration to work toward achieving “gender equality and non-discrimination, equality for all, diversity and inclusion.” In ILO’s statement, no other characteristic (race, ethnicity, etc.) is named as part of any priority to achieve equality, diversity, and inclusion.⁴⁸

Similarly, the Laudes Foundation Statement on Gender, Equity, and Social Inclusion⁴⁹ describes a commitment to eliminating “structural discrimination so that factors such as gender, ethnicity, sexual orientation, race, nationality, class, or family background do not limit people’s life prospects,” where “gender” but not race, nationality, class, etc. is named explicitly in the title. Gender is the primary category of disadvantage in a 2022 white paper sponsored by UNCTAD. This paper describes gender as the most fundamental social division across societies, laying the groundwork for their argument that the economy itself is “a gendered structure.”⁵⁰

Another important aspect of equity in the multilateral development literature describes it as an ideal for mutual understanding and sharing resources *between* countries instead of an ideal order *within* a society. In particular, equity is an aspiration for countries of the Global North vis-à-vis the Global South.^{51,52,53}

UNCTAD recently began exploring the implications for the Global South of the worldwide and ubiquitous distribution of advanced technologies, such as artificial intelligence. Most information feeding artificial intelligence worldwide is produced by the Global North to serve the interests of the Global North. Therefore, there is concern that the use of artificial intelligence by the Global South will propagate the interests, priorities, and biases of wealthier countries and cause harm to the Global South.⁵⁴ As another example of equity considerations among nations, the Ford Foundation commissioned an entire manual on the equitable evaluation of development projects when interested parties are from both the Global North and the Global South.⁵⁵



Inclusion aims to bring underserved and marginalized groups into full participation alongside the majority.⁵⁶ In Federal materials, inclusion refers to the active participation of marginalized

people in development—not merely as the recipients of opportunities, services, benefits, or rights. For example, USAID’s “inclusive development” prioritizes the participation of marginalized local people overseas in all project phases from “priority setting, to active design, and implementation, to monitoring and evaluation results.”⁵⁷ As another example, the USAID and State Department Joint Strategic Plan describes as “inclusive and empowering”⁵⁸ an initiative to encourage women overseas to assume leadership roles in combatting violent extremism.⁵⁹

Inclusion, as defined by U.S. philanthropic institutions, is much like the Federal conceptualization. For the Open Society Foundations, inclusion is the process of giving full participation and decision-making power to people who are systematically excluded by prevailing hierarchies.⁶⁰

The principle of inclusion in the discourse of multilateral development organizations explicitly refers to increasing the participation and belonging of women and people with disabilities. “Gender mainstreaming” is a practice intended to increase the inclusion of women in society. According to the UN, gender mainstreaming means considering the implications for women and men of any planned activity, including programs, policies, and legislation, and then making gender integral to the activity’s design, implementation, monitoring, and evaluation.⁶¹ Inclusion is also discussed with respect to accommodating people with disabilities so they may participate fully in society. For example, the UN defines disability inclusion as “the meaningful participation of persons with disabilities in all their diversity, the promotion of their rights, and the consideration of disability-related perspectives.”⁶²

Gender Mainstreaming Definition

Gender mainstreaming is “the process of assessing the implications for women and men of any planned action, including legislation, policies, or programmes, in all areas and at all levels. It is a strategy for making women’s as well as men’s concerns and experiences an integral dimension of the design, implementation, monitoring, and evaluation of policies and programmes in all political, economic, and societal spheres so that women and men benefit equally and inequality is not perpetuated. The ultimate goal is to achieve gender equality.”

United Nations Department of Economic and Social Affairs, Division for the Advancement of Women. (2000). *Gender mainstreaming*. Report of the Economic and Social Council for 1997. New York: UN. <https://www.un.org/womenwatch/daw/csw/GMS.PDF>



Accessibility refers to the principle that the built environment, information technologies, and services should be within reach of all.⁶³

Accessibility may include the provision of aids such as wheelchair ramps or computer screen readers, but it also includes policies and laws that ensure access. In some contexts, increasing accessibility may be necessary for the integration of other marginalized groups, such as women; gender identity minorities; or people from marginalized racial, ethnic, or religious communities.⁶⁴ For example, for a workplace to be accessible to women, it needs separate toilet facilities nearby.⁶⁵ In the available materials of multilaterals, accessibility is subsumed under disability inclusion and refers to the technologies (including the built environment, digital technologies, and laws and policies) that facilitate inclusion.⁶⁶



B. Equity in the Funder-Awardee Relationship

Before describing how funders incorporate DEIA and related principles into pre- and postaward phases of the funding life cycle, it is important to explain two recent trends permeating many aspects of grantmaking for most funders. Our research found nearly all the funders whose materials we reviewed were influenced to some extent by the desire to build an equitable relationship with grantees.^{67,68,69} Not all funders can fully implement this approach, but even Federal grantmakers—particularly USAID—have been influenced by the goal of sharing power with grantees and the concomitant desire to see small, community-based, local grantees become independent and self-sustaining.⁷⁰

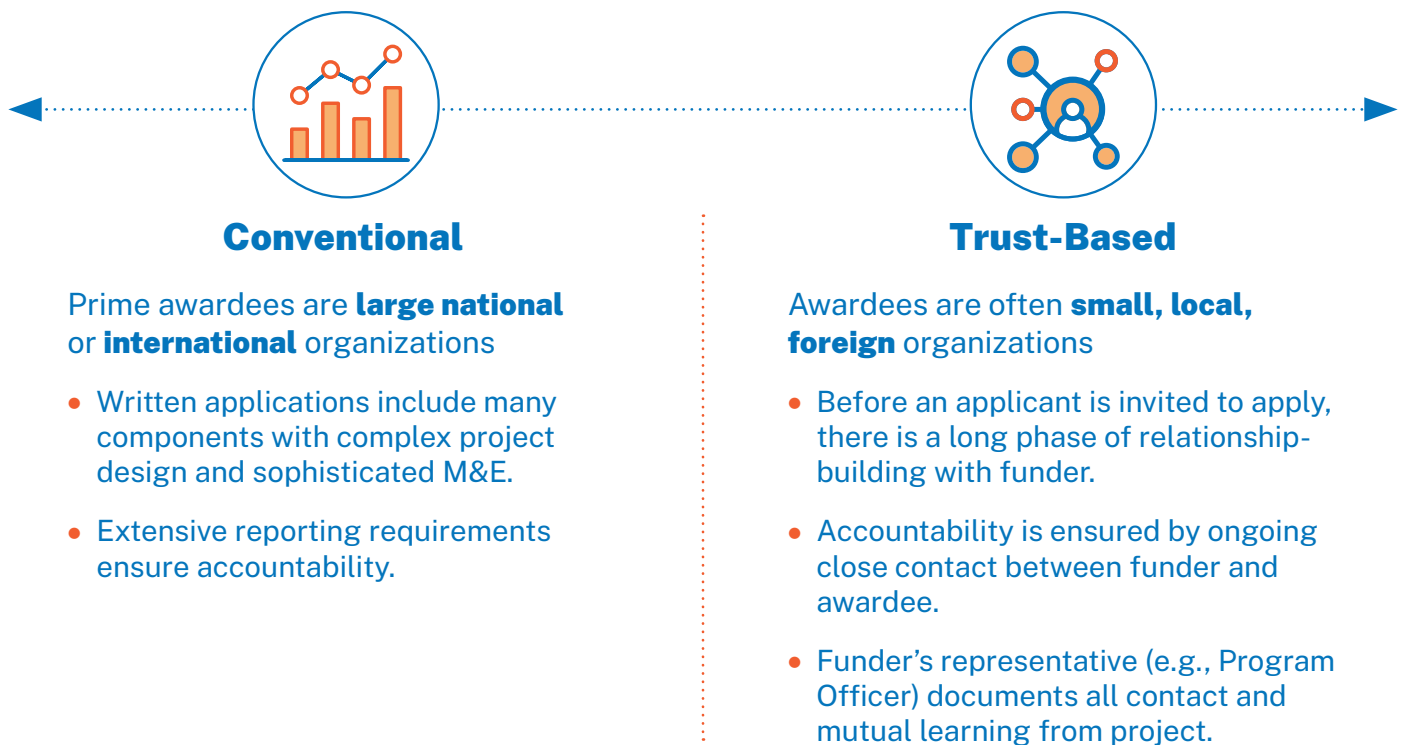
Related to the idea of sharing power with grantees is the concept and practice of participatory grantmaking. Participatory grantmaking is the process of including interested parties (including applicants, awardees, the projects' intended participants, and others) in the decisions about what, how, and whom to fund. Forms of participatory grantmaking range from the practice of bringing in individuals with lived experience as consultants to add knowledge and perspective to the project design, implementation, monitoring, and evaluation to funders, including grantees on committees, to evaluate others' applications during or after their term as grantees. Sometimes participatory grantmaking involves funders simply distributing funding to organizations within a community of interest that subsequently decides how to best use those funds.⁷¹ For the latter style of grantmaking, funders must conduct rigorous research and selection of the organizations they seek to fund.⁷²

I. Conventional and Trust-Based Grantmaking

Almost all the materials we reviewed, and interviewees with whom we spoke, described local, community-based awardees as better situated than large national and international organizations for successful project implementation and positive social change for marginalized and historically underserved communities. Along with this realization that smaller, grassroots organizations may be preferable to large, centralized organizations, a concomitant reconceptualization of the funder-awardee relationship has developed. Funders, especially philanthropic foundations, experienced with community-based awardees prioritize developing a strong relationship of mutual learning and accountability with awardees instead of relying on conventional, unidirectional accountability with extensive monitoring and evaluation. The remainder of this section explains why grantmakers believe this is true and how they are trying to adjust their grantmaking accordingly.

The environmental scan and literature review revealed two general approaches to funding development and social justice projects. The “conventional” approach requires written, formal designs of proposed programming in application materials, including the selection of indicators that will measure participation and outcomes.⁷³ The second approach is meant to facilitate small, local foreign organizations’ competitiveness and relies heavily on the professional judgment of the funding organization and trust between funders and awardees. The latter grantmaking strategy, referred to in some philanthropic circles as “trust-based,” requires a long period of interaction between the funder and the awardee to build a relationship, and then close contact postaward during the project’s execution and evaluation⁷⁴ (exhibit 2).

Exhibit 2. Recent Developments in Grantmaking



Ensuring awardees' accountability and assessing the value of domestic and foreign undertakings has been informed by performance monitoring over the past 40 years across multiple industries relying on contracting and grantmaking.⁷⁵ Performance monitoring requires an empirical description of whether an intervention showed the predicted results (i.e., "outcomes").⁷⁶ "Indicators" are the (usually) quantitative measures selected to assess outcomes;⁷⁷ that is, indicators operationalize outcomes. They are the backbone of performance monitoring. For example, awardees may be required to disaggregate quantitative outcomes of socially marginalized groups from the outcomes of the entire group of participants.

Donors report that the usual methods for securing grantee accountability—such as detailed and numerous written application components, comprehensive monitoring and evaluation plans, and evidence of available cash reserves—work against the entry and success of local, disadvantaged, foreign grantees.⁷⁸ Potential overseas grantees embedded in their communities are well positioned for effective, long-term engagement as a result of their deep understanding of the cultural context and their ties of reciprocity with the community.^{79,80} However, local organizations engaged in international development, labor, and social justice projects are less likely than large, national, or transnational nongovernmental organizations to have the capacity to complete lengthy and detailed application processes and design, execute, and document successful monitoring and evaluation plans.^{81,82}

In response to the challenges potential local grantees face, some funders, especially private philanthropic institutions, have opted to reduce grantees' required paperwork. In this paradigm, formal written application requirements are less extensive than usual. They are replaced by preaward information gathering by funders about the work of the applicant organization alongside deliberate cultivation of a relationship between the funder and the awardee.⁸³

Below we examine some directions in grantmaking motivated by the same impulse underlying trust-based philanthropy. Participatory grantmaking, co-creation, and localization all intend to increase equity in grantmaking by sharing power and resources with interested parties, including local grassroots organizations, but also marginalized and underserved program participants.

II. Participatory Grantmaking

Participatory grantmaking, as described above, is the process of including interested parties in the decisions about what, how, and whom to fund. Participatory grantmaking is predicated on the belief that the involvement of interested parties in all aspects of grantmaking is more likely to facilitate desired change than traditional, top-down grantmaking. This is especially relevant when a problem is complex with many causes that cannot be adequately addressed by a single approach (that is, "wicked problems"⁸⁴). The approach brings together many perspectives to develop a comprehensive concept and effective solutions.⁸⁵

Participatory grantmaking may involve multiple interested parties (in addition to grantees) in crafting priorities, projects, and implementing, monitoring, and evaluating them. It opens grantmaking processes up to a community, rather than locating power and decision-making in the funder-grantee dyad. Deep knowledge of local interested parties can foster flexibility and course correction: local interested parties working together will intuitively know of multiple ways of achieving social goals. When diverse local parties (including people from marginalized and underserved groups) are involved in setting priorities and determining how funds should be spent, the resulting projects should fit their needs better than those designed solely by outsiders.⁸⁶



“Local knowledge can consist of factual knowledge, skills, and capabilities, knowledge of unwritten cultural rules, and a deeper understanding of the social, political, and administrative complexities of an environment — all of which, in theory, can increase the effectiveness of development programs.”

(Domash, A. (2022). *Evidence-based localization: Can existing evidence help guide USAID's localization agenda?* Center for Global Development. <https://www.cgdev.org/blog/evidence-based-localization-can-existing-evidence-help-guide-usaids-localization-agenda>

Some federal and philanthropic funders, awardees, and activists describe participatory grantmaking in ethical terms. Experts describe sharing power and resources between wealthy funding organizations of the Global North and formerly colonized countries of the Global South as part of decolonization.⁸⁷ The goal is to equalize power between high-income and low-income countries by giving the people affected by how the money is spent the power to decide how to spend it.

Co-creation describes the activity of developing a priority, design, plan, and so on, through the collaboration of interested parties with funders. Interested parties may include awardees, program participants, other community members where the program is located, government, and others. Co-creation can be used as a tool for participatory grantmaking. USAID defines co-creation as “a design approach that brings people together to collectively produce a mutually valued outcome and that involves a participatory process assuming some degree of shared power and decision-making.”⁸⁸

An example of using co-creation at the (preaward) planning stage is holding focus groups with local leaders so the funding organization can develop a deeper understanding of development problems. Another example is a funding organization hosting a networking event for local partners at the procurement stage.⁸⁹ Co-creation, according to USAID, works best when the following conditions are met: specialized expertise is not necessary for grasping a complex problem with unclear solutions, partners are open to collaboration and multiple viewpoints, and interested parties are motivated to participate.⁹⁰

Localization is central to participatory grantmaking. Localization means local leaders and grassroots organizations lead development projects.⁹¹ USAID asserts that localization “devolves power to local actors, including, with an inclusive development lens, those from marginalized and/or underrepresented groups.”⁹² By 2025, USAID’s goal is to commit 25 percent of its extramural funding to organizations and leaders located within the communities served.⁹³ The goal of committing 10 percent locally in fiscal year (FY) 2023 was missed by .4 percentage points, down from 10.2 percent in FY 2022.⁹⁴

While capable and worthy of funding, many local organizations are not eligible for U.S. Federal funding because they cannot meet U.S. Federal regulations—Part 200 of the Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (2 CFR 200).⁹⁵ For example, interviewees explained that some organizations may not have sufficient cybersecurity to comply with U.S. requirements for storing personally identifiable information. Or, they may not keep sufficient ledgers documenting assets and expenses.⁹⁶ USAID has designed a “Transition Award”⁹⁷ to help small, local organizations develop the capacity to receive an award directly from USAID (and not solely as a subgrantee). The award is given to an organization whose processes already comply with 2 CFR 200 and uses the funds to develop the local organization’s capacity.

C. Preaward and Application Stages

At the preaward stage, a grant or a cooperative agreement begins as an organizational priority—an idea to fund activities to help the funder reach their goals. These goals may be responsive to Federal Administration priorities and congressional initiatives,⁹⁸ in the case of Federal agencies, or they may fulfill philanthropic goals, in the case of private foundations. At least three chronological tasks bring the grant from idea to application.

First, the funder develops a description of what the organization will fund. The funder must specify other terms the awardee must fulfill, such as the types of activities they are expected to conduct, the types of organizations or individuals eligible, the amount of funding, the length of funding period, and any other requirements. For nearly every funder, this is a written statement of some sort—an FOA, an RFP, or other types of announcements, such as a short description of the proposed project with a limited list of required submission components in the case of some philanthropic institutions. Finalizing and announcing the opportunity is the second task. The third task is to further disseminate the funding opportunity to ensure it reaches eligible applicants. This may involve a public posting for applications or targeted requests to a limited number of prespecified applicants.

The funding organizations' materials reviewed as part of this study sought to integrate DEIA and related principles into the design of opportunity announcements, announcement of the opportunity and its dissemination, and in the application process and selection of applicants. Efforts included the following:

- “Participatory grantmaking,” or the participation of the awardee in preaward stages
- Simplified application processes to minimize barriers that disadvantaged applicants face
- Review of applicants (not just review of their application materials), along with repeated formal or informal interviews to vet and support applicants

I. Funding Announcements

During our interviews, representatives from two funder organizations described some of their respective organization's procedures to ensure opportunity announcements required applicants to address DEIA and related principles in their responses. In one organization, the team drafting the solicitation must work with monitoring and evaluation (M&E) specialists to include recommendations that will facilitate analysis of the participation and outcomes of marginalized and underrepresented groups. Another organization requires draft project proposals to be uploaded onto a platform where internal subject matter experts may review them to identify whether gender is adequately included in the text and revise if necessary.

Funder organizations' representatives explained they require awardees to adhere to nondiscrimination in the development, social justice, and humanitarian programs that awardees may implement and manage. This includes not discriminating against the people who benefit from the programs. Our interviewees explained that, for example, USAID's Nondiscrimination for Beneficiaries policy “requires that USAID staff, contractors, and grant recipients do not discriminate on the basis of any factor; this includes, for example, race, color, religion, sex (including gender identity, sexual orientation, and pregnancy), national origin, disability, age, genetic information, marital status, parental status, political affiliation, or veteran's status.”⁹⁹

The Department of State has recently included mandated reporting of sexual assault in awardee organizations as an Office of Inspector General requirement.¹⁰⁰

The Ford Foundation’s application materials are among the clearest and simplest we reviewed as part of the environmental scan. Ford requires applicants to develop three proposal sections: a narrative with the organization’s mission, goals, anticipated outcomes, and prior experience; an account of their financial health, management, and budget; and a description of the applicant’s efforts and commitment to DEI principles. With two simple questions, Ford requests information about the applicant’s current and future efforts to reach marginalized community members.¹⁰¹

Ford Foundation Application Questions

- **Current community accountability efforts:**

What efforts do you currently take to ensure your work is informed by and responsive to diverse and marginalized voices in the communities you represent?

> Why we ask: We want to understand how your organization currently thinks about diversity, equity, and inclusion on a programmatic level. Specifically, we want to understand how your organization makes efforts to be externally accountable to the communities you serve and work with.

- **Priorities and goals going forward:** Given the efforts you are undertaking around diversity equity, and inclusion, what will you prioritize or shift during the course of this grant?

> Why we ask: We want to understand what you plan to most prioritize relative to your current DEIA efforts as you go forward. We want you to answer both in terms of organizational level-goals, as well as in regards to how you hold your organization accountable to the communities you serve.

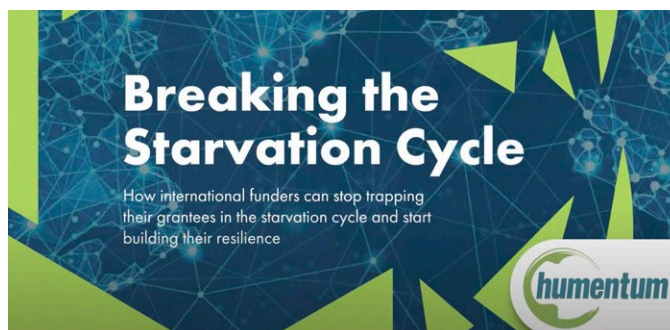
Ford Foundation. (2024c). *Guidance for project support proposals for prospective grantee partners.* <https://drive.google.com/file/d/1L28B1OFaR3-Bs5tJf0X8Xi1tZQwknyW/view>“Guidance for project support proposals - Google Drive

II. Indirect Funding

A few organizational representatives explained that one of the best ways to ensure the inclusion of DEIA and related principles, including gender-related concerns, in awardees’ proposals was to set aside funds to address them. One philanthropic institution allows grantees to request small amounts of money (\$25,000–\$100,000) to focus on specific equity and inclusion projects. For example, a grantee may approach this organization for additional funds to run a workshop on gender. Grantees may also request funds to strengthen internal capacity related to equity and inclusion, such as hiring internal staff that share characteristics with the marginalized and underserved communities targeted. Another organization sets aside 20 percent or more of project resources for the inclusion of marginalized and underserved participants.

Another strategy for ensuring the participation of diverse and marginalized program participants in awardee programming is to bolster the financial health and capacity of the local grassroots organizations and leaders receiving awards. A 2022 study of nongovernmental organizations (NGOs) in 10 LMICs found that most private funders do not adequately cover the administration costs of their grantee organizations. This imperils the financial well-being of the organizations, leading to a “starvation cycle.”¹⁰² Research showed that, on average, NGOs needed 27 percent indirect costs to cover their basic administration expenses, and two-thirds of grants did not adequately cover administration costs (exhibit 3).

Exhibit 3. Watch Video: Breaking the NGO Starvation Cycle



<https://youtu.be/6IUj7UBZijg>

The Ford Foundation commits to providing no less than 25 percent indirect costs.¹⁰³ This commitment is part of Ford’s BUILD (Building Institutions and Networks) initiative that provides social justice organizations with a package of resources, including unrestricted operating support, 10-year funding commitments, support for institutional strengthening, and technical assistance.¹⁰⁴ Independently, representatives of the U.S. Department of State have indicated they advocate for providing local disadvantaged organizations with reasonable closeout costs because they have noted many community-based organizations have experienced financial difficulties at the end of their grant periods.¹⁰⁵

III. Application Processes

Representatives of three organizations, including Federal agencies, that participated in interviews for this report explained they have worked internally to reduce barriers local, community-based organizations face overseas. Organizations seeking to encourage local interested parties to apply for grants or contracts have advocated for “English language flexibility.” That is, they have internally developed the capacity to accept applications in other languages, and they distribute application materials in several other languages and in English.

We learned from interviewees that two Federal agencies provide technical assistance and/or training to local applicant organizations on how to obtain [SAM.gov](https://www.sam.gov)¹⁰⁶ registration and fill out application materials to address barriers related to the complexity of the application process. USAID has cut some of the paperwork burden for their local community-based partners.¹⁰⁷ For example, they allow applicants to write brief concept notes rather than having to provide a complete application.¹⁰⁸

All funders whose materials we reviewed promote inclusion, equity, and related principles by making awards to local community organizations with longstanding ties to underserved and marginalized communities. However, local organizations may lack the capacity to produce compelling and compliant applications, even when they are doing outstanding work. For some philanthropic funders, these are the circumstances under which it is helpful to get to know the applicant organization apart from their written application materials.¹⁰⁹

A relational approach to funding puts the responsibility on the funder to know the networks of organizations at play in each community and possess the subject matter expertise to assess the quality of applicants’ work. In this model, the funder must be active in gathering information about applicants and in cultivating relationships with the applicant organizations. Having built a comprehensive understanding of a given applicant and developed frequent, two-way communication, onerous application processes and detailed reporting become less necessary to ensure accountability—the funder has evidence from multiple conversations that the applicant is capable and sincere about doing what they proposed to do.¹¹⁰ As one philanthropic funder bluntly said, “You can’t have meaningful conversations about DEIA through a grant application,” meaning that application materials are weak indicators of organizations’ actual commitment to DEIA and related principles.

Because risk increases when partnering with small, disadvantaged organizations in unstable political, social, and economic environments,¹¹¹ it may be useful for the funder to interact frequently with the grantee and step in to provide nonmonetary support, such as training, talent matching, or capacity building when necessary.¹¹²

D. Project Design and Implementation

Programs implemented in contexts for which they were not designed risk failure,¹¹³ if not harm, to the people they are trying to help.¹¹⁴ After reviewing multiple scoping reviews of healthcare and education programs, we have not found a widely accepted systematic way of adapting programs to new sociocultural contexts, both globally and within the United States.^{115,116} The advice given to organizations and leaders wishing to adapt programs across contexts is to build multiple feedback loops in the design and implementation stages. Multiple feedback loops ensure continuous assessment of the program's fit with the context and program participants' characteristics and enable prompt attention to any barriers that may impede desired outcomes.^{117,118}



“You’re in a relationship of candidness [with the grantee]. You want that because it will be the way you will actually find out much more than through a report where they feel like they have to boast about everything. A Program Officer [will learn] much more nuanced information to make decisions. It’s going to help us understand how they are actually making a change.”

(Representative of philanthropic organization)

I. Project Design

“Listening first” and cultivating trust are crucial before designing and implementing a program.¹¹⁹ Before tailoring an intervention, funders and/or grantees should learn about the target community’s challenges and preferences and what they have already accomplished. Funders might build in extra time and funding for this process. It is important to speak with potential program participants of different genders, ages, and other characteristics. Grantees should approach the community with humility and recognize they do not know what the community already knows. This process “centers local stakeholders as the knowledge experts in their communities, rather than assuming that development practitioners and organizations know what is best.”¹²⁰ Ideally, discussing the community’s priorities and challenges with a wide range of community members will create a shift in the program’s design to suit the community’s needs better.¹²¹

Written reports available on funders’ websites, and our interviewees frequently made the point that programs are less likely to be accepted without trust, and interventions will simply not work without local buy-in.¹²² It is important to listen respectfully to diverse community members over time and not over-rely on elites—even if local—as intermediaries. Unfortunately, building trust through a sustained community presence is antithetical to a short, project-based model. Therefore, USAID and independent evaluators have recommended at least 5 years of funding,^{123,124} and interviewees from philanthropic institutions explained some organizations prefer to provide at least 10 years of funding.¹²⁵

II. Project Participants

It may not be immediately obvious who is left out of a development effort. Marginalized and underserved community members may not possess formal documentation of their existence (e.g., birth certificates, marriage certificates, inclusion in surveys and censuses). Further, they may prefer to remain unnoticed. More advantaged people may be uncomfortable acknowledging some in their community are marginalized. Worse, some may believe that the marginalized people deserve to be left out. Including marginalized and underserved community members may put those members at risk.¹²⁶ Particularly when competition for scarce resources is fierce, the suggestion that a new group may become empowered to claim their share of those resources could provoke retribution, including violence.¹²⁷ No substitutes are available for sensitivity, caution, and sustained interaction and observation on the part of funders, awardees, and subawardees.^{128,129}

The United Nations' LNOB approach also specifies the first step as “determin[ing] who is being left behind.”¹³⁰ UNICEF suggests identifying who is being left behind by analyzing disaggregated quantitative and qualitative data from national censuses, surveys, demographic health information, and government administrative data and registration systems.¹³¹ However, they also concede that the communities most unequal and discriminated against may not be represented in countries' official demographic information. Migrants, nomadic or stateless populations, people who are homeless or slum-dwelling, people living in institutions, and others may not be counted in official data.

When data are collected at the household level, stigma may inhibit the family's willingness to include some individuals based on age, disability, or gender. Factors contributing to discrimination and inequality tend to overlap and intersect, with those who are the most marginalized frequently having many disadvantaged characteristics such as gender, age, disability, economic status, race, religion, caste, geographical location, migrant status, nationality, statelessness, sexual orientation, minority ethnicity or linguistic minority, and occupation.¹³² Regarding occupation, certain types of employment and categories of employees—including migrant workers, domestic workers, home-based workers, piece-rate workers, and workers with disabilities—tend to have the least social protection, making the type of employment itself a disadvantaged and marginal status.¹³³

Ultimately, it may be necessary to spend time talking with people of the local community to identify who is most marginalized and underserved. Identifying those who have been underserved or left out of development efforts requires extensive knowledge of the local community. UN agencies and USAID rely, respectively, on country teams and missions in the foreign country to undertake much of this work. USAID guidance suggests attending community or social events and relying on good interpersonal skills, shared values, and personal contacts to network successfully with people in the community who are vulnerable.¹³⁴ U.S. philanthropic organizations may not have a presence within the country where they undertake development efforts. Instead, they rely on their employees' social networks developed before and during employment at the philanthropic organization.

III. Inclusion Strategies

To identify and include marginalized and underserved groups in programming, USAID has created the Inclusive Development Analysis (IDA) (see appendix A for a link to the IDA toolkit). The purpose of IDA is to identify marginalized and underserved people, review possible strategies for including them, determine how to best incorporate them, and ultimately partner with these marginalized groups in the execution of a program. Awardees need to ensure no harm comes to people who become vulnerable through their involvement with the program.

Country-specific USAID missions may conduct IDAs to inform the development of the Country Development Cooperation Strategy. The Country Development Cooperation Strategy is a goal, or goals, chosen for the region based on the Federal government's interests and important development challenges experienced by the country.¹³⁵ However, although examining inequalities and power relations at the level of the entire country may inform USAID of blatant country-wide problems, it will not describe the granular manifestations of marginalization in a local context. Therefore, funders and/or grantees may wish to conduct on-the-ground IDA within the geographical and cultural areas targeted for intervention.

USAID suggests an IDA, at any scale, should collect information pertinent to the following six domains:

- National and local policies, regulations, and institutional practices
- Cultural norms and beliefs
- Roles, responsibilities, and time use
- Patterns of power and decision-making
- Access to and control over assets and resources
- Personal safety and security among different identity groups¹³⁶

USAID's inclusion strategy includes the following five steps. Readers interested in further information about each step should consult the IDA toolkit referenced in appendix A.

1. Identify marginalized groups
2. Review the factors that have led to marginalization
3. Explain how marginalized groups are affected by relevant policies and programs in comparison to the general population
4. Identify whether groups are excluded from development programs because of their identities
5. Formulate specific programmatic recommendations to increase inclusion of marginalized communities in programming¹³⁷

The United Nation's LNOB approach describes five steps like those of the IDA. After identifying who is left behind, the next step is determining why they are left behind. The UN provides analytic tools to identify apparent and root causes for discrimination and marginalization, including environmental, institutional, and attitudinal barriers to inclusion, power relations analysis, and gender analysis.

After assessing the reasons for marginalization, the LNOB process involves designing strategies for inclusion by addressing the challenges and barriers preventing marginalized people's full participation. LNOB suggests working toward changing the proximate causes of inequality and intervening to impact root causes. For example, a proximate problem in some communities is the potential for sexual assault when women must walk far from their homes at night or in the early morning to retrieve water. Installing hand pumps closer to homes may mitigate the immediate danger of assault. However, the root causes of this problem may include negative attitudes toward female sexual assault victims, lax law enforcement of sex crimes, and little community censure of offenders. (A UNICEF report claims that sexual violence may be used as a weapon against competing communities to discourage their use of water when it is a scarce resource.¹³⁸)

Ultimately, a long-term programmatic goal should be to influence the root causes of violence against women. Ideally, funders will create a coherent program and design multiple projects to address different aspects of the problem.

IV. Ongoing Project Course Correction

Unless the project or program has already been implemented in a similar community, the heterogeneity of local communities in Global South contexts means that every project will require some modifications to the project design and implementation process.^{139,140} Some modifications may be obvious, such as translation and back-translation of materials into local languages.¹⁴¹ Other necessary changes to the program may be trickier to define and implement. Local interested parties may recognize that barriers to an activity are insurmountable, or the project itself may have features that make it unacceptable, but they may be hesitant to critique. Even when interested parties are forthcoming with their opinions, it may still take great effort to pinpoint problematic aspects and then design workarounds and alternatives.¹⁴²



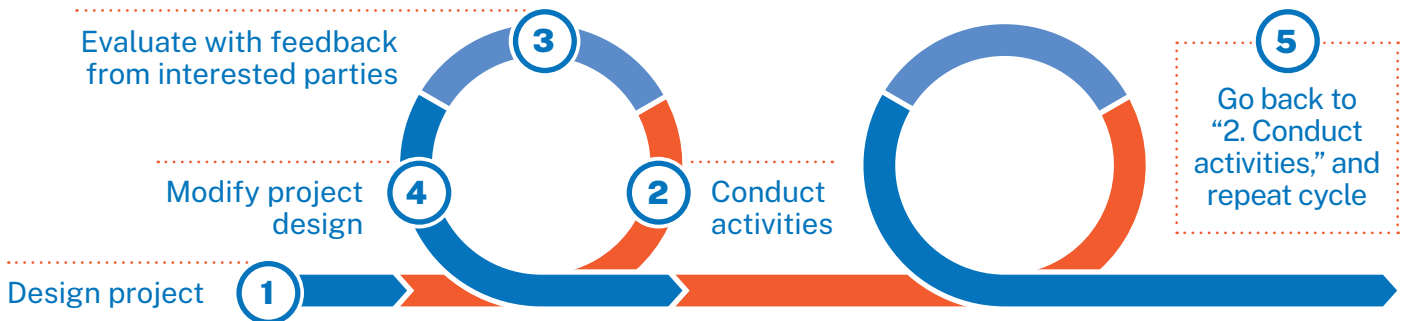
Implementation with experimentation at the core makes it possible to course correct to improve quality ... over time.”

Lansford, J. E., Betancourt, T. S., Boller, K., Popp, J., Altafim, E. R. P., Attanasio, O., & Raghavan, C. (2022). The future of parenting programs: II. Implementation. *Parenting*, 22(3), 235–257.

Asking for input from interested parties and then incorporating that feedback into the program’s modifications is a good participatory practice that will help ensure the acceptability of interventions and their responsiveness meeting local needs (exhibit 4). Along with gathering feedback from program participants of marginalized backgrounds,

awardees may ask for input from other program participants and from “indirect constituents,” including community members not directly involved in programming, groups that represent marginalized communities, and sometimes even government officials.¹⁴³ USAID suggests collecting feedback at the design phase and thereafter at least once per year.¹⁴⁴

Exhibit 4. Postaward: Ongoing Course Correction and Iterative Project Design



V. Avoiding Harm

Marginalized, underserved people in vulnerable circumstances experience an elevated risk of harm compared with other community members. Many places in the Global South with the most need are also in crisis (because of natural disasters, ethnic or religious violence, civil unrest, economic volatility, etc.), are recovering from crisis, or are vulnerable to crisis.^{145,146} Funders and awardees designing and implementing projects must be sensitive to the unintended consequences of their programs. In particular, they should be aware that providing benefits to a subset of the community—particularly when that subgroup has not been part of the competition for available resources—might engender conflict and possibly violence.¹⁴⁷

Avoiding harm is an iterative process of implementing, learning, and revising the program. Ideally, an awardee will begin their project with social connections in the local community; an understanding of national, regional, and local socioeconomic dynamics; and an estimation of how the program might change the community positively and negatively.^{148,149}

The Department of State requires applicants for Bureau of Democracy, Human Rights and Labor (DRL) funding to submit a risk analysis with their proposals. To the right is text of the DRL Risk Analysis Guidelines pertinent to program participants. The Department of State template is available online to aid in identifying risks.¹⁵⁰



“There is no such thing as a neutral intervention”

United States Agency for International Development. (2020). *Responsible development: A note on conflict sensitivity from USAID’s Center for Conflict and Violence Prevention (CVP)*. https://pdf.usaid.gov/pdf_docs/PA00XCZ1.pdf

Department of State statement of risk to beneficiaries

“The safety and security of recipients and beneficiaries are of utmost importance. Applicants should identify risks to staff, implementers, participants, or their communities, in alignment with Do No Harm principles. Besides political and environmental factors, risks may include gender-based violence, sexual exploitation and abuse, and other forms of physical, psychological, economic or social backlash against beneficiaries. They may also include unintended power shifts within or between communities, local competition over program funds and opportunities, unintended crowding out of local civil society actors, or ‘brain drain’ of their own staff or members.”

United States Department of State, Bureau of Democracy, Human Rights, and Labor. (2022). *DRL proposal submission instructions (PSI) for applications updated December 2022*. <https://www.state.gov/drl-proposal-submission-instructions-for-applications-updated-december-2022/>

E. Monitoring and Evaluation

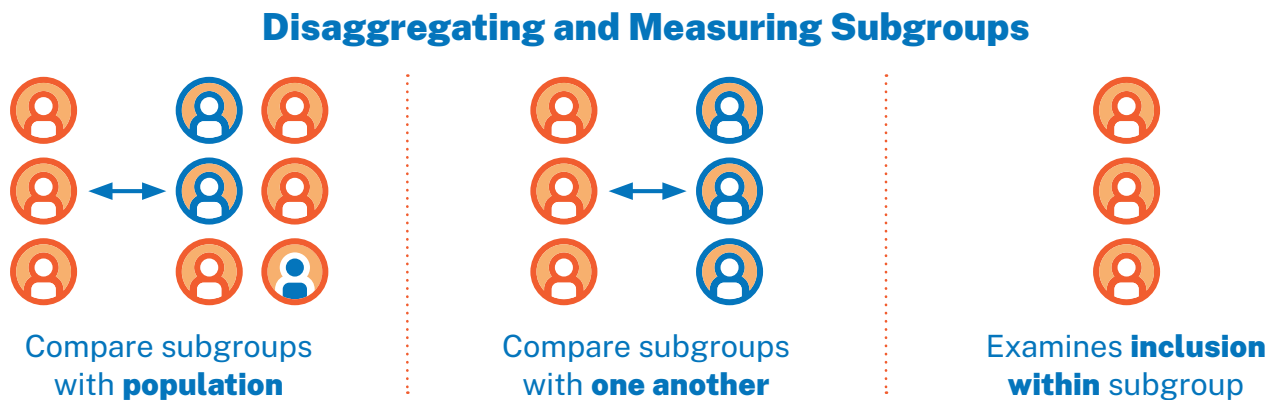
I. Indicators

In response to the *Government Performance and Results Act of 1993*¹⁵¹ and the *GPRA Modernization Act of 2010*,¹⁵² and the *Foundations for Evidence-Based Policymaking Act of 2018* (“*Evidence Act*”),¹⁵³ Federal agencies ramped up efforts requiring their grantees engaged in domestic and international social programs to conduct scientifically sound program implementation, data collection, analysis, and reporting. The goal is to have information to assess what programs were effective and how the benefits were related to the costs.¹⁵⁴ As a result, our search has identified that Federal agencies have produced numerous guidelines for monitoring and evaluating data collection.^{155,156} The UN and philanthropic institutions similarly have moved toward an accountability model supported by quantitative indicators and thorough reporting with the *Paris Declaration on Aid Effectiveness*¹⁵⁷ and the *Accra Agenda for Action*.¹⁵⁸ Some of the monitoring and evaluation guides most applicable to labor and development projects conducted in the Global South are listed in appendix A.

Every level within a logic model—input, activity, output, outcome, or impact—may be quantified by specific indicators to measure the success of the project. Good indicators should be SMART: specific, measurable, achievable, relevant, and time bound.¹⁵⁹ Different kinds of indicators are pertinent to marginalized and underserved people (exhibit 5). At the population level, indicators may compare a marginalized group with the general population on one or more outcomes of interest. For example, the percentage of families of a minoritized ethnic group that work exclusively in the informal sector may be compared with the percentage of families of the entire regional population working in the informal sector. This type of indicator, measured at various points in time, can help evaluators assess whether the marginalized and underrepresented group is catching up to the entire population.

Another type of indicator disaggregates data on subgroups, facilitating comparisons among the groups. For example, the percentage of men trained for advanced manufacturing jobs could be compared with the percentage of women who completed the same training. A third kind of indicator examines inclusion within the marginalized group. For example, the proportion of stateless migrants in a region who do not have access to toilets may be assessed at different times during the project.¹⁶⁰ When measured at different times, this latter indicator will demonstrate progress made toward the marginalized group’s equity and inclusion.

Exhibit 5. Types of Subgroup Analysis: Disaggregating and Measuring Subgroups



Notable for the attempt to operationalize abstract constructs for quantitative measurement are the Gates Foundation's¹⁶¹ efforts to measure attitudinal change. Gates has funded EMERGE (Evidence-based Measures of Empowerment for Research on Gender Equality).¹⁶² EMERGE is an initiative at the Center for Gender Equity and Health at the University of California, San Diego School of Medicine,¹⁶³ to measure "gender equity concepts" such as forced marriage, or abstract constructs such as "empowerment" and changes in attitudes, social norms, and behaviors over time. They have published a list of validated scales that may be useful for funders and grantees to adapt for measuring gender equity, women's empowerment, women's agency, decision-making, and intimate partner violence. They also provide instructions for designing survey questions for measuring decision-making, agency, social norms, institutional structures, etc.¹⁶⁴ Appendix A contains a reference with a link to materials about these efforts.

II. Data Collection

Representatives from more than one organization we interviewed described ongoing difficulties with obtaining the data needed for monitoring and evaluation in communities of the Global South.¹⁶⁵ For example, interviewees reported that the quality of the data collected may be low, and grantees may not report data disaggregated by relevant characteristics (e.g., gender, ethnic group, religion).¹⁶⁶ Typically, Federal funders make an award to a large national or international firm that subawards to local evaluators. Even if the prime awardee is headquartered in the country where the project is executed, likely, they are less familiar with the region where development work will be implemented; they may not even speak the local language.¹⁶⁷ Power dynamics between the employees of the prime awardee and local data collectors may prevent the latter from speaking up when they recognize the prime awardee's methods and instruments for data collection may be inappropriate in the local context. In some cases, interviewees reported that data collection may even cause harm to the individuals or communities from which the data are collected.¹⁶⁸

Participatory methodologies that include local researchers in design and analysis show promise for overcoming some of the cultural barriers and increasing the acceptability of the research.¹⁶⁹ Case study evidence shows that training data collectors to conduct simple analyses and empowering them to make decisions based on the analysis can increase data quality. For example, an international NGO collecting health-related data in villages of Mozambique designed and implemented a program to train their local data collectors to analyze health data. Based on the analyses, they could identify steps to improve the health and well-being of community members they were tasked with surveying.¹⁷⁰ Some of the most detailed descriptions of how to implement a program to teach and empower data collectors come from quasi-experimental studies examining community-level outcomes when health-related data collection and decision-making are conducted by volunteers. For example, a program implemented across several districts in Ethiopia described an intervention that used volunteers to monitor maternal and newborn health in Ethiopia.¹⁷¹

III. Questions on Race and Ethnicity

A factor contributing to the challenge of collecting data on race, ethnicity, religion, and other marginalized minority identities in international contexts is heightened caution about requesting such information, conditioned by countries' regulations. Many European Union (EU) member countries, along with some countries of the Global South,¹⁷² have laws restricting the conditions under which an entity may collect race and ethnicity data from residents. For example, even though no state within the EU completely prohibits collecting data on race and ethnicity, some nations' laws heavily circumscribe it.¹⁷³

Despite the United Nations' guidance to disaggregate data by race and ethnicity to better assess the relative prevalence and incidence of discrimination, violence, and other forms of inequity against marginalized people in the Global South,¹⁷⁴ many UN member countries do not collect (or request from awardees) disaggregated data when evaluating their development efforts, and in fact, do not have information on race and ethnicity for citizens and others residing within their own borders.^{175,176} Because some UN member countries do not collect disaggregated data or request disaggregated from their international awardees, awardees who have received funding from EU sources may be unfamiliar with protocols for requesting information about race, ethnicity, and other potentially stigmatizing characteristics. They may hesitate to violate current and future funders' sensibilities by collecting these data, even when doing so is legal in the country hosting the project.

Contributing to the difficulties of collecting data on race and ethnicity is the indeterminacy of racial and ethnic categories themselves. As culturally constructed classificatory systems,¹⁷⁷ the referents of race and ethnicity shift across time, place, and subgroup. What counts as racial or ethnic difference varies widely even within the EU: In Germany, migration status counts as racial and ethnic origin; in Estonia, mother tongue is a proxy for ethnic difference; and Slovakia recognizes 13 distinct minority groups characterized by partial overlap among categories of religion, ethnicity, and national origin.¹⁷⁸

The complexity is compounded when accounting for multilayered indigenous, colonial, and neocolonial histories of the ethnic and racial categories in circulation within non-European LMIC settings.^{179,180,181} We learned through reading manuals that NGOs and other local organizations express concern with the lack of “fit” of the American discourse of race and ethnicity with the forms exclusion and discrimination took in their nations.¹⁸² Some organizational representatives with whom we spoke about DEIA in international contexts agreed a mismatch is apparent between American categories of race/ethnicity and oppression as manifest in the sociocultural contexts of their overseas projects.¹⁸³

These challenges—the legality/illegality of collecting race and ethnicity data, along with difficulties defining, translating, and identifying context-appropriate race/ethnicity categories—are not easily remediable so that grantees will feel competent and comfortable gathering disaggregated data. Future research might investigate the scope of this problem with strategies for addressing it.

IV. Toward a Better Model

Funders' M&E requirements include quantifiable short-term results as assurance that money is appropriately spent, and the funded program is effective in creating social change. The challenge related to these expectations is that social change is slow, recursive, and difficult to quantify, especially in the socioeconomically unstable regions targeted for development work.^{184,185}

Our interviews with all funding organizations' representatives, along with published reports documenting local, grassroots grantees and funders' perspectives on M&E in the Global South, show a shift toward reducing the reporting burden on already overstretched organizational staff and budgets by relying on descriptive narratives to fulfill reporting requirements. At a minimum, these narratives might include progress made toward the project goals, along with evidence, a discussion of what the grantee did over the reporting period, and adjustments the grantee might have made to the project to accommodate external and internal changes. The Ford Foundation requires yearly reports from grantees of no more than 3,300 words that answer 5 questions about project progress and the state of the grantees' organization.¹⁸⁶ Instructions to grantees are to focus on "learning over outputs or activities."¹⁸⁷ See the text box for the prompts guiding the Ford Foundation awardees' narrative reports.¹⁸⁸

Recent reports documenting funder-grantee perspectives on M&E^{189,190} found that grassroots awardees experienced the outcome and impact evaluation measurements as burdensome and unsuitable. The burden increased exponentially when awardees cobble together money from different funding sources with different reporting requirements.

Ford Foundation Report Narrative Questions

- **Outcomes:** Over this reporting period, what progress did you make towards the outcomes you identified in your proposal? What data and/or evidence do you have that supports this?
- **Activities:** Over this reporting period, describe the work you did and how the funds you received supported those activities.
- **Changes in the external context:** Over the course of the grant, how was your work impacted by significant shifts in the broader context?
- **Learning and adapting:** What have you learned about how change happens over the past grant period? How are you adapting based on those learnings and the changes in your context?
- **Internal changes:** Please note any significant changes or issues your organizations experienced during this reporting period.
- **Diversity, equity, and inclusion highlights and progress:** Given your organization's efforts and goals around diversity, equity, and inclusion described in your proposal, what happened during the course of the grant? What were some areas where you have seen the most progress? What has been the most challenging?

Ford Foundation. (2024b). *Guidance for grant reports for project support grants*. https://drive.google.com/file/d/1Epld6ZkjSjCRLCWqzP_Kwsu-OYm2gJ4U/view

Grantees cited in these reports claimed that time spent on M&E took away from time for their development work, and quantitative reporting measures were ill-fitting: “They often felt that these [M&E] systems did not effectively measure the complicated and non-linear improvements in women’s lives and that the focus on quantitative measures missed the nuance of their work.”¹⁹¹ They also indicated that short-term measurement was not useful because change is slow and multidetermined in the complex and frequently fragile and unstable environments in which they worked.¹⁹² Generally, our interviewees and materials from the environment scan concurred that 5 years or more were necessary but not sufficient for bringing about social change in complicated environments.^{193,194,195}

Based on our interviews and the materials we have reviewed, all funders focused on facilitating long-term impact have begun to recognize the difficulty of quantifying it. They acknowledged that the effects of the funded programs on people’s lives were not captured by most M&E models,¹⁹⁶ and some have dropped measuring impact altogether.

The representatives of a philanthropic organization we spoke with said they have stopped asking for indicators in proposal applications and do not require any quantitative reporting from their grantees. Because their program officers form close, lengthy relationships with their grantees, they already know whether a given grantee is carrying out their plan. This funder considers reporting from their grantees as contributing to learning about what is effective and what is not. Because the purpose of the grant is to improve participants’ welfare, they claim that if the grantee is learning and adapting to further meet local needs based on what they learn, they are demonstrating accountability to their funding sources.

A philanthropic institution whose representatives we interviewed reported that, internally, they create indicators and metrics that represent the effectiveness of the entire portfolio, and they measure 5-year outcomes against benchmarks they design at the strategy level. This funder’s program officers must keep updating and tracking grantees’ progress based on their ongoing conversations with them. They also collect other evidence pertinent to the grantees’ work, such as newspaper articles that refer to their program. At the 5-year mark, the funder hires an external evaluation consultant to help the funder assess what they have learned from the entire portfolio.



“How change happens — it’s not going to happen in a year or two years, maybe even in five years. It’s going to be slow. It’s going to be complex, and there’s gonna be a lot of backsliding. [We] recognize the complexity of the work and acknowledge that. We are building that into what type of information we collect — trying to make it less burdensome.”

(Representative of philanthropic funding organization)

V. A Note on Qualitative and Participatory Research

Some Federal and philanthropic funders have experimented with using qualitative and participatory reporting methods to highlight the work of their grantee organizations and the program participants. Grantees, funders, and scholars perceive a focus on stories and narratives as movement toward equitable evaluation and may elect to monitor and evaluate programs using qualitative methods such as in-depth interviews and focus groups.^{197,198,199} They argue that elevating participants' voices and perspectives in the evaluation process is the starting point for inclusion and empowerment of marginalized and underserved people in the greater society. Ideally, these reports draw from diverse community voices, including local leaders, other organizations, and community members not directly benefiting from the program.²⁰⁰ Equitable evaluation means centering the community's needs and concerns over the funder's needs and concerns for reporting.

However, when implementing qualitative and participatory methods, it is important to be mindful that collecting, aggregating, and analyzing these data is as labor-intensive as reporting on quantitative indicators.²⁰¹ Using qualitative methods may also add risk of harm. For example, the literature describes Photovoice²⁰² as a promising participatory method that features the perspectives of program participants. Participants take photographs and then later talk about the pictures with a researcher who compiles the stories. Photovoice facilitates discussion of topics that participants might be hesitant to share; commenting on a photo is a helpful indirect way to speak about something sensitive.^{203,204} However, the issues regarding informed consent are complex because all individuals photographed need to provide consent to participate in the research, increasing logistical complexity.

5

Conclusions and Emerging Practices

This report describes how DEIA and related principles can be integrated into grantmaking by funders of programs and projects concerned with development, social justice, and human rights in international contexts. Information comes from a review of funders' available materials describing aspirations and methods for incorporating DEIA and related principles; in-depth interviews with representatives of funders including governmental, philanthropic, and multilateral organizations; and a review of pertinent literature.



DEIA fits imperfectly within the foreign contexts in which many development projects are implemented. Federal, philanthropic, and multinational funders occasionally use the term “equity” (and “equality”), but they infrequently describe their goals for development in foreign contexts using the term “DEIA.” Awardees, including U.S., and multinational organizations, along with grantee organizations, reported that they struggled to map relations of power in the communities where programs run onto the discourse of race in the United States. Instead, we learned that conceptualizing people who suffer inequality in societies as marginalized, underserved, or made vulnerable, appears more useful for identifying inequality and acting to remedy it.

Consensus among grantmakers who fund projects and programs in the Global South is that local, community-based organizations are more effective in bringing about desired social changes than large, foreign, national, or international organizations. These small grassroots organizations may have gained the trust of the most marginalized people in their communities while successfully implementing programs to bring about change. However, the problem is that small, locally led, community-based organizations are unlikely to include the numbers and diversity of trained professionals needed to participate in grantmaking successfully as applicants: writing project proposals, managing Federal grant money appropriately, complying with information security and other federal requirements, and conducting robust monitoring and evaluation. Therefore, the problem has become: How do funders support localization even when the small, local, community-based organizations they wish to fund are ill equipped to meet their requirements?

As a result, the international grantmaking community is shifting toward participatory models that include power sharing with awardees and robust development of relationships of mutual discovery and accountability. In philanthropic organizations, this means a shift toward a model in which the funder, or their proxies, stay in close contact with grantees, assist them with challenges as they arise, and provide training and other expertise as needed. In this model, the funder and their proxies keep close track of progress through informal conversations over the course of the grant. They may also bear the responsibility for documenting the grantees’ use of funds, activities, and any outcomes.

In addition to localization, emerging practices suggested by our scan include the following:

- Simplifying application processes to encourage applications of less-resourced, community-based organizations
- Accepting applications in languages other than English
- Providing technical assistance to applicants for completing their applications
- Asking applicants to describe their plans for reaching underserved and marginalized communities in plain, simple language on the application
- Researching — and getting to know — potential awardees before making awards. This helps to make more equitable the applications of small, community-based, underresourced organizations with applications from large, highly professionalized organizations
- Providing at least 25 percent indirect funding to small, locally led organizations to ensure the sustainability of the organization at the end of the grant

- Allowing awardees a period before formally beginning to implement the award to cocreate with, or at least consult with interested parties, including potential program participants, community members not targeted, local leaders, government officers, and subject matter experts, among others. A process in which interested parties are centrally involved should result in a design that is feasible and acceptable and has goals shared by program participants and the community
- Building in time for identifying those who are being left out. Assessing whether those who are left out are marginalized and underserved. Potential tools (see appendix A) for conducting this analysis include USAID's IDA and the United Nation's LNOB approach. USAID and the UN do these analyses in the country before releasing a call for applications. However, this planning could be executed by independent subject matter experts hired as contractors, or by the grantees themselves before beginning to implement their project
- Course correcting the program design in response to feedback during implementation. Iterative program design addresses the needs of unique communities, including previously underserved, marginalized members, and the complex and frequently unstable environments where projects may be implemented. Building in time and money for informal feedback sessions on the project progress and implementation challenges from various interested parties and for any suggested course correction
- Requiring a Statement of Risk to Program Participants from awardees at application and when adjusting the project design
- Choosing the types of disaggregation that will best measure the outcomes and impacts of the project on marginalized and underserved population subgroups. A few analytic possibilities include comparing the subgroup of interest with the entire population on variables of interest; comparing subgroups of interest with one another; and comparing outcomes within the subgroup of interest
- Training OR requiring/providing funding for training local data collectors to run simple analyses of the data they collect. The analyses should be of high interest to community members
- Directing project officers' time and effort toward the building of relationships with their local, community-based grantees. In this model, project officers would construct a written narrative of the progress of the project from frequent, informal conversations with grantees. This documentation will demonstrate the accountability of the grantee to the funder
- Limiting written reports from awardees to the barest necessities. Paring down reporting requirements to exactly what Congress (for example) needs for accountability. Requesting nothing additional
- Requiring that indicators and other monitoring and evaluation data collected and reported be useful to the grantee in assessing and furthering their work
- Balancing the needs and capabilities of the funder when choosing among quantitative and qualitative data collection methods. Qualitative data collection and methodologies are as, if not more, time-consuming and expensive to conduct and require comparably advanced analytic skills to interpret
- Assessing the potential for harm of all proposed methodologies

Appendix A.

Example Resources and Tools for Funders

Resource	Primary audience	Description	Suggested use
PowerPoint Presentation (fordfoundation.org)	Funders	Sponsored by the Ford Foundation, this report critiques current funder-grantee accountability models and suggests how funders can work more equitably with grantees to produce acceptable evaluations.	For funders interested in localization and sharing power with grantees
Co-Creation: An Interactive Guide (usaid.gov)	Funders	This guide, designed for USAID, describes how to use co-creation to design programs and policies.	For funders who wish to explore co-creation for grantmaking
Guide to Inclusive Development Analysis (usaid.gov)	Funders	This USAID guide is a tool for collecting information from six analytic domains pertinent to the identification and inclusion of marginalized and underserved groups in programming and policies.	For identifying marginalized and underrepresented groups and designing programming for them
LNOB-in-WASH-Guidance-Note.pdf (unicef.org)	Funders	Designed by WASH, an awardee of UNICEF, this is a tool for understanding LNOB, identifying excluded subgroups, and integrating them into programming.	For identifying marginalized and underrepresented groups and designing programming for them
Risk Analysis https://www.state.gov/risk-analysis/	Grantees	A template for applicants to describe and rate risks of harm to participants and other interested parties involved in the proposed project.	For implementing the principle of Do No Harm
Guidance Note 3.1: Integrating gender equality in monitoring and evaluation. wcms_165986.pdf (ilo.org)	Funders, Grantees, Evaluators	Describes United Nations Evaluators' Group guidance on how to evaluate change in gender equality. Includes definitions of gender mainstreaming, gender equality.	For program design, implementation, and evaluation that increases equity and inclusion
Listening to Local Voices: Accountability and Feedback Plans https://www.usaid.gov/sites/default/files/2022-12/USAID_NPI_ALPGuideSeries-4_5-27-2022b.pdf	Funders, Grantees, Evaluators	A “how to” guide for developing a plan to solicit and incorporate the feedback of participants during the implementation of a project.	For program design, implementation, course correction, and evaluation that incorporates participants' voices

Resource	Primary audience	Description	Suggested use
GIZ-2021-Indicators-Matter-to-LNOB_EN.pdf (poverty-inequality.com)	Grantees, Evaluators	Explains the United Nations’ LNOB principle along with how to design indicators to measure change in poverty and inequality. Includes materials on data collection.	For evaluation design and developing measures for assessing change in poverty, inequality, and lack of access
Selecting and Refining Indicators USAID Learning Lab	Grantees, Evaluators	This is a suite of guidance and tools for identifying appropriate monitoring approaches and indicators.	For evaluation design. These materials do not focus exclusively on disadvantaged and marginalized populations
Monitoring and Evaluation Resource Guide for OCFT Projects https://www.dol.gov/sites/dolgov/files/ILAB/Monitoring-and-Evaluation-ME-Resource-Guide-for-OCFT-Projects-updated-May-22-2024.pdf	Grantees, Evaluators	Describes how to conduct M&E, including designing a project evaluation plan. Contains standard indicators, information on how to design indicators, suggested formats, and performance monitoring plans.	For evaluation design. These are necessary instructions for complying with OCFT reporting. These materials do not focus exclusively on disadvantaged and marginalized populations
MEL for Workers’ Rights Programs: Where Do We Start? https://www.dol.gov/sites/dolgov/files/ILAB/merl/MEL-Plan-Template-OTLA-ME-Services-CLEAN-2-09-24-508-3.pdf	Grantees, Evaluators	Describes how to conduct M&E, including designing an evaluation plan. Contains standard indicators, information on how to design indicators, suggested formats, and performance monitoring plans.	For evaluation design. These are necessary instructions for complying with OTLA reporting and do not focus exclusively on marginalized and underserved populations.
Theory of Sustained Change Guidebook for ILAB’s Worker Rights Programs (dol.gov)	Grantees, Evaluators	Describes how to construct a theory of change in complex contexts.	For informing evaluation design, including constructing a theory of change, choosing indicators, and accounting for contextual complexity.

LNOB = Leave No One Behind (UNICEF); M&E = monitoring and evaluation; OCFT = Office of Child Labor, Forced Labor, and Human Trafficking; OTLA = Office of Trade and Labor Affairs; WASH = water, sanitation and hygiene (UNICEF)

Appendix B.

Data Collection Methods

A. Environmental Scan

Our search of funders' materials primarily focused on three kinds of organizations:

- Federal departments and agencies that award grants, contracts, and cooperative agreements to entities conducting labor-or development-related work in foreign countries
- U.S. privately funded foundations that award grants for work in foreign countries to promote philanthropic development or social justice projects that evinced some engagement with one or more DEIA principles
- Multilateral labor and development organizations with online evidence of engagement with at least one DEIA principle

We began our exploration of **Federal** materials with the *Executive Orders* signed by President Biden along with subsequent updates to those orders. These documents serve as the foundation for the equity plans and updated DEIA statements created by Federal departments and agencies. In total, we reviewed eight *Orders* created between 2021 and 2023. See below for the list.

In the second step, we reviewed the 23 *Equity Actions Plans* mandated by the *Executive Order*.²⁰⁵ All the Equity Action Plans can be found at <https://www.performance.gov/equity/#action-plans>. Equity is described at <https://www.performance.gov/equity/>. We examined the plans for any mention of nondomestic activities that included diplomacy, human rights, development, or humanitarian assistance. From the list of Federal departments and agencies with equity plans, we culled those without a plan for increasing equitable work overseas, leaving eight with a discussion of equity in foreign contexts.

White House Executive Orders Reviewed

January 20, 2021, Executive Order 13985: Advancing Racial Equity and Support for Underserved Communities

June 25, 2021, Executive Order 14035: Diversity, Equity, Inclusion, and Accessibility in the Federal Workforce

March 8, 2021, Executive Order 14020: Establishment of the White House Gender Policy Council

October 22, 2021, National Strategy on Gender Equity and Equality

April 26, 2021, Executive Order 14025: Worker Organizing and Empowerment

February 4, 2021, Memorandum on Advancing the Human Rights of Lesbian, Gay, Bisexual, Transgender, Queer, and Intersex Persons Around the World

February 2023, Delivering on Equity, Access, and Opportunity for the American People

February 16, 2023, Executive Order 14091: Further Advancing Racial Equity and Support for Underserved Communities Through the Federal Government

We conducted more extensive searches for DEIA and related materials on the websites of the eight Federal organizations with substantial nondomestic funding activities, per review of the *Equity Action Plans*. Search terms included the following:

(DEIA OR DEI OR diversity OR equity OR inclusive OR inclusion OR accessibility OR inequality OR marginalized OR vulnerable OR underserved OR disadvantaged)
AND (global OR international OR LMIC OR low-income countries OR middle-income countries)

To identify relevant materials within private and nonprofit **U.S. foundations** and **multilateral development organizations**, we started with entities that funded overseas projects related to labor, development, human rights, or social justice. We consulted with subject matter experts within our organization (Westat) to identify relevant funders. Our Contracting Officer's Representative within the Chief Evaluation Office and her colleagues also suggested funders to consider for inclusion. Occasionally, we learned of an additional foundation mentioned as part of a Google search for funding organizations or during our review of the scholarly and independent literature.

We saved materials discovered during searches of the websites of Federal agencies, U.S. foundations, and multilaterals as PDFs and/or with links to the website. Materials included statements pertinent to DEIA and related principles, evaluations and meta-evaluations, blogs, announcements of initiatives, guidebooks, application guidelines, awardee progress report guidelines, and manuals, among other materials. We recorded the bibliographic reference and briefly summarized the content highlighting its relevance to DEIA and related principles in international grantmaking.

Our searches were comprehensive but not exhaustive. If we were unable to find relevant materials after independent searches by two team members, we did not search further within that organization. The quantity of materials differs across organizations. For example, a Federal agency working exclusively in foreign countries, such as USAID, generated copious amounts of useful materials, whereas other Federal agencies with nondomestic grantmaking activities, such as the USDA's Foreign Agricultural Service,²⁰⁶ generated fewer hits relevant to our project.

B. In-Depth Interviews

We conducted in-depth, semistructured interviews with representatives of organizations that fund international development work, including the Federal agencies, U.S. foundations, and multilateral development organizations discovered in the environmental scan, to complement our review of their publicly available materials. We reached out to 11 organizations and received positive responses from 8. Westat's Institutional Review Board approved interview protocols and recruitment materials. The protocols addressed the following topics: definitions of DEIA, implementation of DEIA and related principles in foreign communities, construction of funding notices, monitoring and evaluation, strategies for reaching marginalized and underserved populations and avoiding harming them, and best practices. See appendix D for the in-depth interview protocol.

The Westat/DOL team selected interviewees from organizations that had experience with the issues of interest to ILAB. The team chose organizations based on two factors: whether their publicly available information demonstrated the to use DEIA or related principles in international funding and whether, in the professional judgment of the evaluation professionals at CEO, ILAB, and the Westat team, the organization has a promising perspective on DEIA or related principles in international grantmaking.

Interviews took place between April 8 and June 27, 2024, on Microsoft Teams and lasted no more than 60 minutes. We obtained consent from respondents for participation. A note taker was present, and we also recorded the interviews to facilitate double-checking our notes on what was said during the meeting. Interviewees sometimes recommended documents to the team, which were then added to the environmental scan or literature review.

We conducted nine group interviews (two group interviews with different members of one organization). In total, we spoke with 21 individuals. We conducted two interviews with a combined total of nine representatives of two different Federal agencies; three interviews with six representatives of U.S. philanthropic institutions, one interview with one international development organization's representative, and one interview with four staff members of a nonprofit.

C. Review of Literature

We identified resources using internet search engines such as Google and Google Scholar to find relevant websites, blogs, white papers, conference presentations, scholarly journals, books, and other pertinent materials. Interviewees also suggested materials we added to our review. For each item, we documented the reference and wrote a short summary of the relevance of the content. Appendix C is a bibliography of materials reviewed as part of this study.

Criteria for review and inclusion included the following:

- Materials describing diversity, equity, equality, inclusion, accessibility and related principles in relation to grantmaking
- Materials describing implementation and challenges with the implementation of strategies to improve the grantmaking process
- Materials pertained to Federal, philanthropic, or multilateral grantmakers
- Materials published or dated within the last 10 years

Two productive searches are listed below. The first search elicited materials pertaining to funding development that benefits the most underserved members of society. It included the following terms:

(LMIC OR low income countries OR middle income countries OR developing countries OR the Global South) AND (grant making OR funding) AND (diversity OR equity OR inclusion OR dei) AND (vulnerable OR marginalized OR underserved)

The second search elicited materials specific to monitoring and evaluation in grantmaking, which we reviewed for relevance to DEIA and related principles:

(LMIC OR low income countries OR middle income countries OR developing countries OR the Global South OR international OR world) AND (grantmaking AND performance monitoring)

D. Data Analysis

Data analysis began with reading or reviewing all materials. Altogether, we gathered 105 written resources that are included in the study. For materials gathered from funders' websites and the independent and scholarly literature, the researcher took notes that included the following information: title, authors, authors' organization, date published, sponsoring organization, type of work (manual, evaluation, press release, etc.), and the purpose of the work. Next, the reviewer noted the main points or conclusions of the resource (if it was making an argument) and/or the tools offered (logic model construction, indicator development, guidelines for working with grantees, etc.). Finally, the reviewer noted how the resource contributed to the review and how it articulated with other materials already reviewed (e.g., "This resource offers a solution to the problem of how to ensure quality data collection from local data collectors.")

The lead author read in-depth interview transcripts and notes carefully and summarized interviewees' answers to questions, noted the main points made, and cataloged any additional resources that may have been mentioned. Next, the lead author identified themes and notable differences across interviews. These themes and differences were triangulated with findings from the environmental scan and literature search.

E. Limitations

Our study was comprehensive but not exhaustive. Our interviews were limited to representatives of only eight grantmaking organizations. We searched for materials on funders' websites as described above, but funders differed in the extent to which the materials were easily discoverable. It is possible we have missed relevant resources.

Environmental scan and literature search resources that described how to incorporate DEIA, narrowly defined, in preaward and postaward stages of international grantmaking were limited. Funders based outside the United States infrequently conceptualize development and social justice work within the DEIA framework. Some of the independent and scholarly literature critiques DEIA as a principle guiding grantmaking in the Global South. Therefore, our search of the independent and scholarly literature required reconceptualizing the questions because articles focused on DEIA in international contexts were largely deconstructive.

We were unable to find materials that bridged the "how-to" manuals targeted to awardees, and the critiques of funder-grantee relationships to describe how funders might best assist awardees with the nuts and bolts of implementing, monitoring, and evaluating projects targeted to marginalized and underserved program participants. Even so, a copious amount of material guides funders and awardees on how to design projects to improve the lives of marginalized and underserved program participants in foreign countries. Our challenge was to synthesize these materials and think critically about how grantmakers might help their awardees use the suggestions.

Appendix C.

Environmental Scan and Literature Review References

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Appendix D.

In-Depth Interview Protocol

I. Introduction

I'd like to ask everyone to tell us their name, title, and how long you have been working at your organization.

II. DEIA Definitions in Practice

1. As a reminder, DEIA stands for diversity, equity, inclusion, and accessibility. We know that your organization's website describes DEIA as important to your work. How does your organization put DEIA into practice in the [GRANTMAKING/CONTRACTING/FUNDING] process?
 - A. Do the practices you mentioned differ for the different goals of DEIA: diversity, equity, inclusion, accessibility? How do they differ by [PROMPT ON EACH LETTER OF DEIA]
 - B. How does integrating DEIA into grantmaking differ depending on the country or local community where the work will be done? [PROMPT ON SPECIFIC GEOGRAPHIES AND COMMUNITIES]
 - C. How do you integrate DEIA concerns into different parts of the funding life cycle? [PROMPT ON SOLICITATIONS, PROJECT DESIGN, AND M&E REQUIREMENTS]
2. How was your organization's definition of DEIA created? What concepts, scholarship, observations, etc., informed the definition?

III. Design of Funding Opportunities

1. What steps has your organization taken to improve attention to DEIA-related goals in the design of solicitations and funding announcements?
2. What steps has your organization taken to develop applicants' responsiveness to including DEIA considerations in their proposals?

For example, have you offered expanded resources, funded an expanded design phase, or funded participatory designs or co-creation?

IV. DEIA Implementation in Local Contexts

1. How does your organization adapt DEIA principles to reflect a community's specific context?
2. What guidance or tools (if any) has your organization provided to awardees to support them in incorporating DEIA in varying contexts?
3. Can you provide examples of how you have successfully adapted DEIA principles in a local context?
4. Are there some countries or local contexts in which it is more difficult to implement DEIA (equity-focused) approaches? [IF YES]: What strategies do you use in those contexts?

V. Reaching Marginalized and Vulnerable Populations

1. What obstacles impede awardees from identifying and reaching marginalized, underserved, and vulnerable populations?
2. What strategies have you and they used to try to overcome those challenges?
3. How do you avoid harming vulnerable populations while reaching and engaging them?
4. Can you share any success stories of how an awardee was successful in engaging a vulnerable population?

VI. Monitoring and Evaluation

1. How have you incorporated DEIA considerations in monitoring and evaluation of projects?
2. What metrics or indicators does your organization use to evaluate whether awardees are reaching marginalized or vulnerable populations?
3. What challenges, if any, awardees face in collecting these data?
 - A. How have you overcome these challenges?
 - B. What strategies or tools did you use?

VII. Best Practices and Long-Term Vision

1. In your experience, what are the best practices for incorporating DEIA into international [GRANTMAKING/CONTRACTING/FUNDING]?
2. Are you able to suggest any resources or tools that you think are especially helpful in incorporating DEIA into [GRANTMAKING/CONTRACTING/FUNDING]?
3. Can you provide any insights into [INSTITUTION'S] long-term vision for strengthening a focus on DEIA in international [GRANTMAKING/CONTRACTING/FUNDING]?

VIII. Wrap-Up

1. Is there anything I did not ask about that you think would be important for ILAB to know as they work toward strengthening commitment to DEIA in their grantmaking?
2. Are there materials you could share with us that might help us understand your organization's approach to DEIA with respect to funding international projects?
3. Are there any questions you have for us?

Thank You!

Appendix E.

Endnotes

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