THE TIME IS NOW

Funding Diverse, Equitable, and
Inclusive Youth Fellowships

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OPEN SOCIETY
FOUNDATIONS

ACKNOWLEDGEMENTS

WHAT YOU WILL FIND IN THIS PUBLICATION

This guide, created by the Open Society Foundations' Youth Exchange, encourages readers to think about fellowships as a useful tool to make the leadership pipeline for youth activists more equitable and to contribute to building more inclusive collective power. It includes insights, practical guidance, and suggestions drawn from the experiences of the Youth Exchange and its grantees. It is intended primarily for funders, yet the authors hope other practitioners interested in supporting the work of youth activists around the world through individual fellowships will find it useful too.

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THE TIME IS NOW

"The time is now. I feel overwhelmed knowing everything that's happening in Puerto Rico and in the world. But we have the capacity to come together and fight. We're not alone in the world. All of the world's issues affect us as a collective." Bet Collazo, a Youth Exchange Community Youth Fellow alumnx, is working to call attention to how Puerto Rico's education crisis is dramatically affecting young people's ability to assert their economic, social, and civil rights.[1]

Like Bet, young activists throughout the world are continuing to propel change and advance open society values by working at the intersection of movements and building solidarity among diverse actors, within and between generations.

In 2016, as part of our strategy development process, the Youth Exchange became aware of an acute need, both in the Open Society Foundations and in the field of youth activism, to help expand the leadership pipeline for young activists from impacted communities who experience multiple forms of structural oppression and high barriers to participation. We also recognized that a number of young people with non-dominant identities and backgrounds might experience barriers to accessing fellowship opportunities.

In line with the principle of the Open Society's Fellowship Program that "investing in individuals is not about investing in individualism," our strategy has been to focus on supporting individual activists build the power of the collective and create more equitable, inclusive, and interdependent movements and communities.

We launched the Community Youth Fellowships in 2017, a collaborative grant-making initiative focused on engaging young people as individual grantees through a diversity, equity, and inclusion (DEI) lens.[2]

This guide represents our effort to document what we learned through different iterations of fellowship implementation in the United States first and then in other countries, together with Open Society programs and foundations, over the last five years. The goal is to offer useful know-how primarily to interested funders.[3]

The questions, reflections, and recommendations herein are based on our experiences of implementing the Community Youth Fellowships and on the feedback we received from the fellows and colleagues involved. We make no claim that they are exhaustive. Moreover, we recognize that what we describe in this document may require adaptation for some readers according to local context, resources available etc., but we also hope any such shifts in direction will remain firmly grounded in the core values we describe.

In developing our fellowship program, our initial emphasis was on intellectually and developmentally disabled activists. By identifying and involving disabled youth as fellows, we sought to combat the prejudices of ableism and help promote disability rights.[4] We used this as the basis for expanding principles of accessibility and inclusion to all the fellowships we worked on with other Open Society programs, ensuring that they were all open and easily accessible to disabled applicants.

Through this initial experience we learned lessons along the way and made changes: we challenged how we worked as a team, our criteria for selecting activists, whom we selected, who sat on the selection committee, and how we learned and taught one another. We also learned lessons by examining how all areas of work and all participants—from fellows' projects to workshop facilitators and event vendors—can and must be aligned with program values. One of the lessons we learned was that we should have adopted from the start a disability justice framework, which is the one we promote in this guide.

For us, reimagining traditional processes to advance equity and to center the voices and experiences of the most impacted communities has been a steep learning curve, and we are committed to continued learning in these areas.

Finally, we recognize that any work we do, including the production of this guide, occurs through our own positions of power and privilege—both as individuals and as white professionals working in the private philanthropy space. At the same time, we wish to situate ourselves openly as professionals propelled into this work by our own personal experiences, including that of having disabled family members.[5]

The Youth Exchange was designed as a five-year initiative to end in 2020. Although the Youth Exchange closed in December 2020, we hope the Community Youth Fellowship and its strong values of diversity, equity, and inclusion for young people will continue in different forms within and beyond Open Society, in order to support movements and societies that are rooted in equity. Above all, our hope is that the inclusion of young people through a DEI lens will become a solid and sustained pattern and not an exception when we support young activists and movements.

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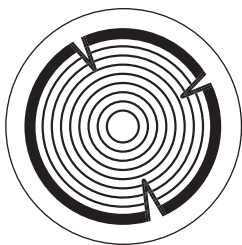
1. DEFINITIONS

Since the terms listed below are used in different ways by different organizations, we provide the following working definitions to establish shared language among our readers. We define "Youth," "Fellowship," and "Diversity, Equity, and Inclusion" first, since they are key terms and concepts in this guide.

Youth

There is no universally agreed upon definition of "youth." To deepen inclusion, we adopted a definition flexible enough to encompass the different geographic or thematic contexts of each fellowship, as well as the different lived experiences and career stages of the young people with whom we engage. That said, the program usually worked with young people between the ages of 18 and 30. While acknowledging the importance of *child* participation (as defined in the UN Convention on the Rights of the Child), young people between the ages of 15 and 17 (i.e., still legally children) were not supported as fellows, because of Open Society legal considerations on grant making to minors. In talking about youth, we never meant or mean to create additional silos, and we see support for young people as an element in building stronger intergenerational movements.

Fellowship

A fellowship is understood here as a fixed-period grant to support an individual advancing a project of their own design. Fellowships can be oriented around research, advocacy, grassroots organizing, campaigning, or other activities, with the overall aim of systemic change to create more open and just societies. Fellowships are a distinct tool that funders can use to foster change and advance broader strategic goals that may complement organizational grant making, advocacy, and/or strategic litigation.

In the Community Youth Fellowship model, proposals are solicited through an open and competitive call. Once awarded, fellowships generally include a living stipend and a budget for project expenses, including travel and professional development. Fellows may work independently, implement their day-to-day project work within or attached to a community-based organization, or be hosted or work in formal or informal partnership with an NGO or community organization of their choosing. While the primary beneficiary must be the fellow, the broader ecosystem—the funder, a host organization, and/or the movement—may be simultaneous beneficiaries of the individual's work and project outcomes.

This guide acknowledges that there are multiple avenues for individual funding: direct administration; re-granting fellowships through an organizational entity or fiscal agent; or funding organizations/movements that center individual leadership development, training, and expanding the leadership pipeline. Although the lessons in this guide are drawn particularly from fellowships directly awarded and administered by the funder, they can be adapted to and useful for different avenues of individual funding.

Diversity, Equity, and Inclusion

There is not a universal definition of Diversity, Equity, and Inclusion (DEI). Within this framework, we place the main emphasis on equity as the fundamental principle of the triad.[6] An equitable program integrates inclusive practices that can convene and sustain the leadership of a diverse group of youth, in a non-tokenistic way.

This is why we sometimes refer to equity only. A diverse group is not necessarily inclusive or equitable, since diversity does not itself address barriers to participation (inclusion) nor does it necessarily shift power (equity). While diversity can be counted, it does not capture how people feel in a given environment; as a stand-alone goal or outcome, it is problematic and partial. Inclusion describes the outcomes and efforts to include people who are often systematically excluded, pressured to assimilate within a dominant culture, and face barriers to full and meaningful participation within a group, organization, movement, or society. While inclusion addresses barriers to participation, equity calls for justice and the consideration of the root causes of inequities.

A fully equitable group leverages policies, practices, resources, and culture toward a transformative redistribution of power that directly addresses the historical and compounding impacts of the structural inequities. Equity strategies center the people most impacted by racism, ableism and other forms of oppression within spheres of power and decision-making that affect their lives. An equity lens also acknowledges the reality of intersectional oppressions of multiple economic and social categories and identities (e.g., race, ethnicity, gender, sexual orientation, socioeconomic status) interlocking with systems of privilege and oppression (e.g., racism, sexism, ableism, xenophobia, and heterosexism).[7] Because the barriers preventing

equitable and inclusive outcomes vary immensely, the objective is not to treat everyone the same, but to take active steps to dismantle and eliminate cultural, interpersonal, institutional, and structural barriers standing in the way of those outcomes.

While diversity and inclusion may be employed as strategies to deepen impact, we have come to understand that without an equity analysis, structural disparities remain unaddressed.

Healing Justice

Healing justice refers to "resiliency and survival practices that center the collective safety and well-being of communities."[8]

Language Justice

Language justice refers to the right of every individual to communicate in the language and medium that is most comfortable for them.[9] Language justice is also equity issue when viewed through the lens of power, privilege, and oppression.

Funder and Grantee

In this guide, we use the term "funder" for the person, institution, organization or agency administering a grant and "grantee" for the recipient of a grant (in this case, a fellow). We acknowledge this framing may not resonate with all readers (other framings, for example, focus more on partnerships).

Field

The authors define the field as a country, region, or thematic area that may include (though is not limited to) actors, governance, and power dynamics. For example, a fellowship might seek to engage a *community* of youth within a broader *field* of thematic, geographic, or constituency-based foci.

Disability Justice

Disability Justice is an approach that examines how disability and ableism intersect with other forms of oppression and identity: race, class, gender, sexuality, citizenship, incarceration, etc.[10] In the words of Patty Berne, one of the founders of the Disability Justice Collective, "A Disability Justice framework understands that all bodies are unique and essential, that all bodies have strengths and needs that must be met. We know that we are powerful not despite the complexities of our bodies, but because of them."[11]

Plain Language and Easy-to-Read

We recognize the importance for accessibility of using both plain language and Easy-to-Read. Plain language makes information clearer and more concise, ensuring that content is easy to understand and digest. It generally features short sentences, avoids complex jargon, and active, not passive, tense.[12] Easy-to-Read incorporates the same principles as plain language, but goes one-step further. Easy-to-Read generally includes images to support the text, uses simple wording, breaks down large writing into very small chunks, and excludes unnecessary detail.[13]

We believe it is always best practice to produce publicly available information in plain language as a baseline. However, we realize that plain language may not meet everyone's communication needs. For some people, including some people with intellectual disabilities, Easy-to-Read can be more suitable and remove one barrier to access and participation.

Language accessibility is part of our wider commitment to language justice, as we describe in section 3: From Fellowship Launch to Orientation.

2. STRATEGIC QUESTIONS AND CONSIDERATIONS BEFORE STARTING A YOUTH FELLOWSHIP

This section includes guidelines on conducting field analysis, defining a theory of change, examining the program's niche, mitigating the risks associated with individual fellowships, encouraging community participation, and defining and evaluating outcomes.

These considerations are based on the Youth Exchange team's experiences of strategizing for new Community Youth Fellowships in different contexts with the specific goal of advancing youth engagement through an equity lens. The goal of your fellowship may of course be different, and the practices described here need to be adapted to local context, using a DEI analysis as an opportunity to learn more about the many forms of structural oppression and how they operate within the lives of the communities you seek to support.

2.1 Field analysis

A field analysis or scan is about gathering and synthesizing data that explores a particular issue. It can be initiated to identify or clarify a strategic direction, understand emerging issues, map the funding environment, and/or find gaps:
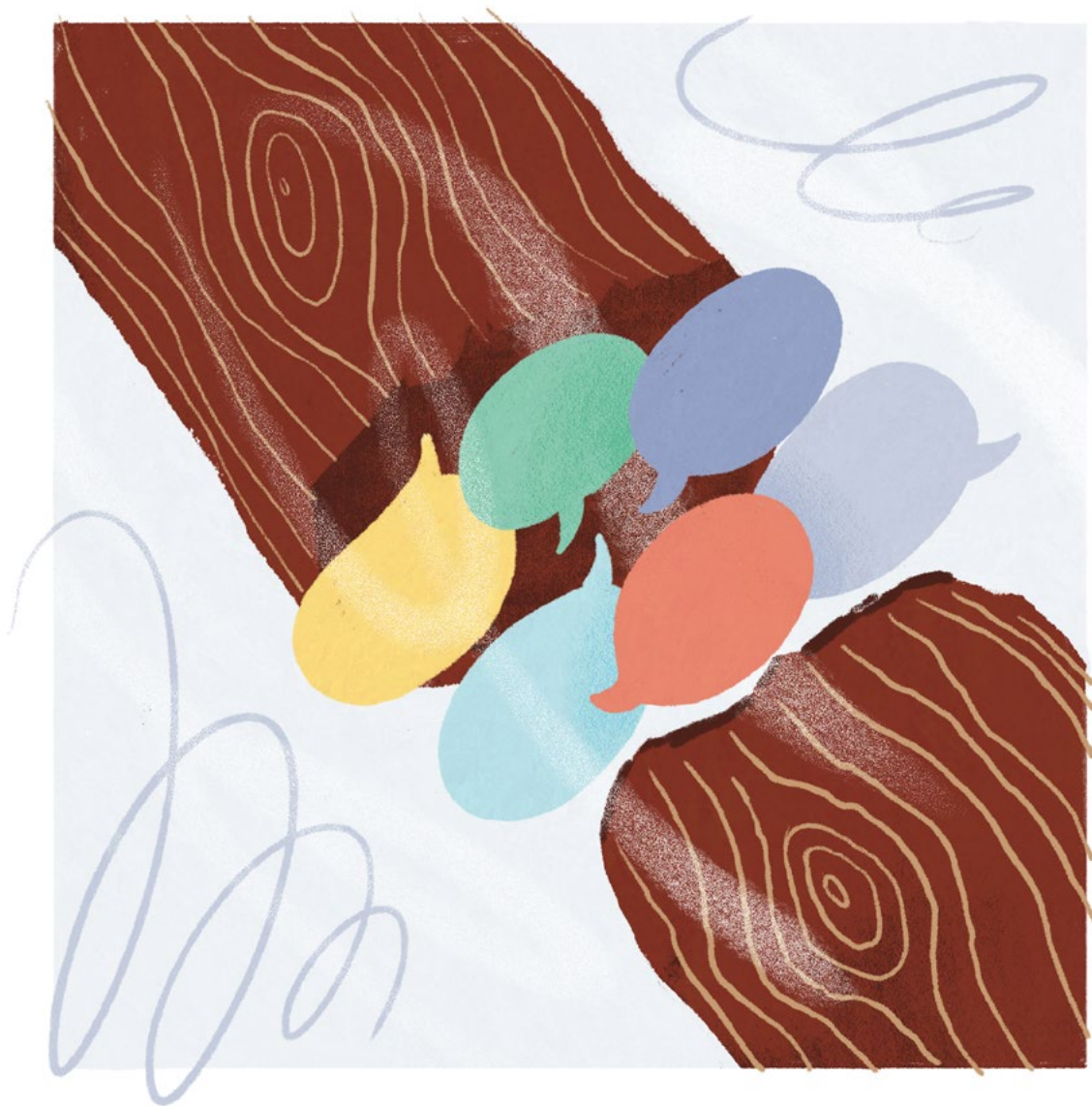
"There are many reasons to conduct a scan [or field analysis], and many ways to do it. Some scans are formal and follow well-defined protocols and timelines; others are more free form. What they all have in common is a focus on gathering information from disparate sources, making sense of it, and learning from the information that comes in. … A scan that's begun for one purpose usually ends up serving others, as well, and its benefits tend to ripple out across many areas of work."[14]

Hearing from key constituencies is a fundamental part of the field analysis (see section 3.1: Community and Youth Participation).

Consider the following questions prior to initiating a field analysis:

- Given your goal/the goal of your program, what main gap/part of the gap or need in the field are you addressing through a potential youth fellowship?[15]
- What are the strengths and opportunities the youth fellowship can build upon?

- How does your field analysis integrate an equity lens?
- To what extent does/can your analysis of the gap and needs and strengths include different voices in the field? What challenges do your constituents face in their movement building efforts?[16]

2.2 Theory of change and the role of the fellowship as a grant making tool

Given the result of your field analysis, how do you think change will happen? What are the pathways/levers? What is your theory of change?[17] In particular, consider:

- What groups of youth activists do you seek to support?
- What distinct value could support to individuals—especially emerging activists—bring to your strategy?
- How does focusing on the target group/constituency you seek to support address structural disparities and advance equity?
- How could the youth fellowship complement or substitute organizational grant making or other tools?
- What are the systemic barriers that impact youth activists and their participation in a youth fellowship program?

- Are there any potential risks and challenges in providing individual fellowships rather than, or in addition to, an organizational grant?
- What change will occur because of your work?
- How would you define long-term success and what do you consider "long-term"?
- How would you define interim success (e.g., is this on the right track? Should we make changes?).
- How, and to what extent, will you involve the community in defining your theory of change?

2.3 Examination of the program's niche: strengths and challenges

- Are you the right program to fill the gap identified through the field analysis? What capacities do you have (or lack) to fill this gap?
- How will you assess your capacity and that of your program to implement a youth fellowship program that embodies equity?
- What organizational challenges, for example in terms of processes and policies, might you experience as you commit to a more equitable approach to individual grant making to youth activists?

- What is the specific role your program would play in comparison to other funders (if any)?
- What relationships do you need to build for the fellowship to be successful?
- How can you build relationships that are rooted in mutuality and that recognize both the funder and grantee as valuable contributors?

How to mitigate possible negative implications of individual fellowships

Some risks and challenges can come with the fellowship, and youth who experience profound disparities may face additional or compounding ones. Below we offer some examples of possible negative implications, with suggestions of how they may be mitigated.

Individual vs collective leadership

- As we mentioned in the introduction, investing in individuals is not about investing in individualism. However, it is important to consider the possible effect an individual grant may have of elevating certain individuals as leaders and/or grant recipients,[18] especially in communities that have limited access to activism-related support, and even when organizations and groups strive for inclusive, participatory leadership.

- How can the fellowship program support a leadership definition and practice that promotes building communities and collective power and leadership rather than "exceptionalism" and "heropreneurship"?[19] For example, we saw that a key characteristic of individual leadership was the ability to build the leadership of others.[20]
- Consider as an alternative the prize network: instead of focusing on "winners" of a grant, create application processes that amplify collaboration between applicants, helping forge relationships with one another and social justice organizations.[21]

Representation

Since the youth fellowship is about elevating individuals to help build collective power and more equitable movements, it is important to understand to what extent the fellowship applicants are connected to and representing their communities (we asked in the application form: "Who are your people"?),[22] and not only other youth. It is important to look deeper than charisma to make sure that the fellows represent their constituencies and are situated within strong networks. Having said this, the funder should keep in mind also the barriers that many young people experience in their communities and these barriers should be taken into consideration.

Possible costs of the individual fellowship

Funders should consider the financial and non-financial costs a fellowship might have on an individual. Below are some examples.

Financial costs

- Fellowship applicants might be receiving state-sponsored health care benefits, income, and/or food assistance; a grant might eliminate eligibility for these benefits in certain situations. How will you compensate for lost income/benefits?
- Following the grant period, how will you support the fellow and allocate for the time and expenses involved in their return to the sources of income and support they were receiving prior to the fellowship, if needed?

Many foundations encourage resourcing true costs for organizational grants; this could be considered also for individual grants.[23]

Non-financial costs

- Are there personal challenges related to possible burnout due to the pressure of managing a grant individually?
- What are the implications an individual grant may have on personal activities or leisure time due to the recipient's increase in public visibility?[24]

Possible implications of the fellowships for the fellow's organization

A fellow might take temporary leave from their current position within an organization upon accepting the grant.[25] As a result, other members of their organization might take on new duties and growth opportunities during the fellow's grant period.

- How will you plan for potential organizational impacts related to the fellow's temporary leave (e.g., leadership transition, training, restructuring)?
- How will you strategize to mitigate potential negative impacts of the fellow's return to the organization on the fellow and/or other members of the organization?

Security concerns

There may be risks for fellows, in certain contexts, if they are seen as being affiliated with the funder. These risks can also be related to digital security.[26] This can be particularly true for fellows without institutional affiliations, who may be especially vulnerable. To mitigate digital security risks, consider if the grantee and/or other people working on the project are viewed with hostility by the government or non-state actors; if the grantee handles sensitive information of interest to a government or non-state actor or if the information of threatened groups; if the funder is likely to be under scrutiny in the country or region where the grantee operates.[27]

Security should also be considered within a holistic framework that refers to the digital, physical, and psychosocial well-being of fellows.

2.4 Community identification, participation, and reach

- How and to what extent will this constituency, including young people, be involved going forward in the process of fellowship design, selection, implementation, and evaluation?
- Who are the other actors outside the constituency who may need to be engaged in the fellowship processes?
- Who are the other actors outside the constituency who need to be influenced through the fellowship?
- Who will decide on the ultimate recipients of the fellowship? How will decisions be made? Are there opportunities for young people from the communities you seek to support to participate in the selection process?
- How are you going to support disabled fellows, keeping in mind that disability accessibility often translates into accessibility for all (see section 3.1: Community and youth participation)?

2.5 Defining and evaluating outcomes

In defining outcomes, it is important to develop shared language, frameworks, and analyses of the fellowship goals among staff, youth participants, and program supporters:

- What outcomes do you hope to achieve on the individual, community, and movement level?
- What does success look like in some or all of these levels?
- How do these outcomes contribute to meeting the goals of your program?
- How do fellows understand the goals of the program and how do they reflect on their role in advancing those goals?
- How do these outcomes address structural disparities and advance equity?
- During the implementation of the fellowship, where did youth share power in the assessment process with the fellows/community members?

Below are some general questions for *evaluating the outcomes* of your fellowship. They may help you and your team design more specific evaluation questions:

- To what extent has the program met the goals/outcomes initially set out on the individual, community, and movement level? What does success at these levels mean over the duration of the fellowship?
- To what extent has the fellowship pushed you to rethink some of those goals?
- What did or did not work?
- How might you look for unintended impacts beyond what your hypothesis for change suggested? To what extent did fellows meet *their own* success markers?
- How might you track successes and shortcomings during the course of the fellowship to improve the program as it goes forward? Are there potential moments where an assessment could be helpful in knowing whether/how to continue, double down, or shift?

As funders, we need to be cautious about the level of our expectations from fellows, given short fellowship durations, as we know social change is an incremental process. For this reason, when possible, it is useful to consider the outcomes of a fellowship from a longitudinal perspective over a period of time that extends beyond the fellowship grant period.[28] In this case, you could also consider:

- The sustainability of the fellowship project (with the exception of projects that might seek to address a specific issue that can be resolved in a year, such as a campaign for a referendum).
- The continued engagement with the fellows/network of fellows beyond the fellowship grant period.

Given the focus of the fellowship on diversity, equity, and inclusion, it is also important to reflect upon and regularly assess the extent to which the fellowship's *processes* have integrated an equity lens. In addition, you should ask how/to what extent your learning could inform changes in operational norms in your organization, especially related to equity and youth engagement.

Finally, another important dimension of the evaluation is *how to assess* the proposed outcomes.

There are several methods to answer assessment questions, ranging from more traditional ones (interviews, focus groups, surveys) to participatory evaluation processes and methods involving, in this case, the youth fellows and other members of the community.[29] Participatory monitoring tools such as stories about most significant change may be of particular interest to individual fellows.[30]

2.6 Considerations about the program's budget and staff capacities

In our experience, is important to evaluate budget and staff capacities at an early stage together with the strategic considerations presented in this section. It could be harmful for the young people involved not to have access to adequate support.

The cost of the fellowship will vary depending upon many factors, such as geographic location, type of project supported, and associated costs. We recognize that both funders and organizations may have limited operating budgets. Some of the below suggestions about financial considerations might be supported through alternative avenues, such as third party funding or joint fellowship initiatives through strategic partnerships.

Some points you might want to consider:

- *Costs related to the fellowship award.* Depending on how you structure the fellowship award (see section 4: Fellowship Grant Structure), we recommend taking into consideration a few types of support, including:

  - *Stipend/Salary:* a salary that is equitable and transparent depending on location and cost of living.
  - *Project Costs:* a distinct budget for necessary project expenditures, such as meeting costs, purchasing supplies, infographics or other communication-related outputs.
  - *Health Care Costs:* depending on geographic focus and the state health care system, these costs should be covered. In defining well being costs, you should use a holistic framework and include mind, body and soul, wellbeing and healing.

- *Costs related to fellowship operational costs:*

  - *Planning and Implementation Costs:* advisors and consultants, fellow professional development to attend conferences or courses (e.g., technical skill development, language studies and holistic security that includes digital, psychosocial[31] and physical well-being), travel costs (if applicable) for staff or fellows, and learning and assessment.
  - *Grant Closure and Assessment Costs:* alumnx funding for continued professional development, meetings and events (if applicable), and final evaluation.
  - *Accessibility Costs*: language translations and interpretations, Communication Access Realtime Translation, accessible event spaces including inclusive childcare, food choices, and ingredient labeling (see section 3.2: New fellow orientation).

- *Costs associated with staff time and their own professional enrichment/capacity development,* which might include trainings that focus on anti-racism, disability justice, and LGBTQI rights.

3. FROM FELLOWSHIP LAUNCH TO ORIENTATION: REDUCING BARRIERS, WIDENING ACCESS

This section outlines recommendations on how to operationalize DEI from launching the fellowship, to reaching out to the community, to setting selection criteria and decision-making protocol and orienting new fellows. All these steps include language justice considerations and encourage youth participation.[32]

MEMO

AS SOON AS YOU DECIDE TO LAUNCH A FELLOWSHIP, IT IS IMPORTANT TO CONNECT WITH OPERATIONAL COLLEAGUES (e.g., YOUR GRANTS AND LEGAL OFFICERS) TO ENSURE COMPLIANCE AND AVOID DELAYS.

Based on our experience and a number of factors outlined in this section, it can take from six to nine months from the time your program decides to initiate a youth fellowship to the time individuals who receive fellowships begin work on their projects.

Language justice

A youth fellowship program that infuses language justice presents an opportunity for youth to exercise their right to communicate in the method or style of their choice while building multilingual movement spaces that embody the principles of DEI.

Some examples of language justice in outreach and selection include:

- Translating calls for proposals and application materials into languages used by the community, as well as Easy-to-Read, a format that conveys information in short sentences using widely used and easily understood words in combination with images[33] and national sign languages, as many Deaf people[34] prefer to use their national sign language, since it is their native language.[35]

- Hosting open outreach webinars in languages used by applicants (with interpretation for the funder, if needed), offering sign language interpretation and Computer Access Real-Time Transcription to enable better information access.[36] This includes ensuring that outreach materials like Word documents, PDFs, and Power Points follow accessible document formats.[37]
- Requesting only a letter of intent at the outset, rather than a full proposal, given that the latter requires more time and effort and may deter and exclude some potential applicants.
- Allowing application materials to be submitted in different communications formats (written, video, audio, etc.). No single method of communication should be required. For example, requiring only written submissions—even just for part of the application—could exclude some signing Deaf people.[38]
- Letting go of perfectionism.[39] We learned that we needed to look differently at applications we had initially seen as "not polished," instead focusing our attention on what was original and engaging about applicants' projects, without regard for language or presentation. We came to understand that looking, even inadvertently, for "perfection" reinforces existing power relations within hierarchical institutions.[40]
- Ensuring that the selection committee has simultaneous or consecutive translation or interpretation is another goal. We note that even applicants who are comfortable presenting in the working language of the funder may have difficulty expressing certain words or phrases outside their preferred language.

Language justice must also go beyond the selection process. Especially for fellows at early career stages, fellowship requirements related to reporting and understanding technical details (e.g., how tax authorities define lobbying) can be overwhelming and nuanced and should be made available in plain language and in a language and format that is well understood. A language justice approach to orient new fellows and support project implementation could look like this:

- Providing welcome documents in plain language and in a language and format used by the community. Such documents might include information the funder needs (necessary tax documentation, bank information) and information the funder wants to convey (grant outlines and expectations, planned payment structure details, project budgets, etc.).
- Translating, in advance, important email related to deadlines and deliverables such as grant reports, etc.
- Producing guidance on reporting, such as funder expectations for financial reporting of project expenses, in an accessible toolkit.

- Allowing fellows to submit reports in their language of choice and providing reporting templates in that language. Reports may also be received in different formats (video, audio), as mentioned for the applications in the next section. In this case, the funder may need to transcribe reports to meet their required format.

All these practices also support healing justice – see section 5.1: Healing justice.

3.1 Community and youth participation

Depending on factors such as geographic or thematic focus, some funders might have already deep connections to young people and the communities they seek to support. Since the geographic and thematic focus of our fellowship changed each year, it was useful to hire local consultants to increase proximity to and understanding of the community.

Community advisors can help root the process in the community and ensure cultural or community sensitivities at each decision point. These community-based consultants may hold voluntary or paid positions. In our case, these were paid positions for specific, time-bound responsibilities.

Engaging Advisory Consultants
In addition to gathering information from the community and mapping opportunities and needs, advisory consultants can help by providing advice related to eligibility criteria, outreach strategy, selection method, etc. Advisors might also support the funder by reviewing project proposals and helping ensure that projects connect with the community's real needs.

While an advisory consultant can potentially also serve as an outreach consultant (see below), the associated responsibilities and deliverables are distinct, and a different profile may be necessary.

Eligibility criteria

An important way of increasing equity and inclusion is to tailor the eligibility criteria of a fellowship to the community you would like to support.

If an aim of your fellowship is to expand the leadership pipeline of young activists, then it is important to remove either all educational requirements or at least tertiary education from the application criteria, given that barriers to participation prevent many individuals from attending institutions of higher education.

Engaging Outreach Consultants

Certain communities may face multiple barriers to accessing grant opportunities, including the language used for the call for proposal, the online application materials (which may not be accessible due to limited internet), cumbersome proposal requirements, and/or lack of established engagement/connection. Funders themselves should reduce some of these barriers through language justice. An outreach consultant will have authentic relationships with the community the funder seeks to support reducing the other barriers. The consultant, in a "scouting" capacity, can ensure that the call for proposals reaches the community and individuals within it who have the desired candidate profile by using unconventional tools and platforms (such as radio or digital/analogic influencers). They can also use new and existing online platforms to disseminate the call for proposals; engage with relevant community stakeholders in person, at conferences, and/or at workshops; deliver application process presentations at community workshops or events.

Nominators and outreach consultants

Some fellowship programs use a system of nominators (both internal and external to their organizations) who tend to identify possible fellowship candidates within their existing networks. For our fellowships, we preferred to use open calls and to hire outreach consultants with a specific mandate to disseminate the call beyond their network to candidates who would not otherwise be reached. This approach gave us some of the advantages of the nominations system while ensuring expanded outreach.

"There was a deep level of outreach that [the outreach consultant] did to ensure the call reached communities across Puerto Rico. She went directly to university campuses, community colleges, radio stations, and local newspapers yelling about this opportunity to anyone who would listen. She used communication dissemination platforms to meet young activists where they were. This targeted outreach yielded an exceptionally diverse group of applicants."

— Alvaro Fernandez, Open Society Puerto Rico Youth Fellowships

The principle of "do no harm" should be carefully considered when involving advisors, when making decisions about launching a fellowship and/or when determining which applicants are successful. In this context, conflict sensitivity and attention to power dynamics within different communities is very important, especially if there are known tensions between ethnic, class, social groups or across generations. Conflict sensitivity is the ability of an organization to understand the context in which it operates and the interaction between its intervention and that context. Based on this understanding, the funding organization can minimize negative impacts and maximize positive impacts with respect to conflict. [41]

Disability-inclusive and accessible youth fellowships

In partnership with the Human Rights Initiative, the Youth Exchange launched the Community Youth Fellowships to support intellectually or developmentally disabled youth activists to advance human rights projects in the United States.[42]

In this particular fellowship, we defined youth as young people between the ages of 18 and 24. However, in other cases, we adopted a flexible definition of youth that did not adhere to a strict age range and took into consideration the regional context and/or the theme of the fellowship. See the definition of Youth, section 1: Definitions, for more information.

After clearly identifying the community we wanted to engage with and in an effort to reduce barriers that prevent this community from applying, we used several of the strategies mentioned above to ensure that our call for proposals was accessible and reached diverse activists. We engaged disabled activists and disabled young people as consultants; we removed formal education requirements from the application criteria, given that most individuals with intellectual and developmental disabilities are largely barred from institutions of higher education in the United States. We made the application materials available in Easy-to-Read. We hosted outreach webinars and allowed full proposals to be submitted in a variety of formats, while requesting only a letter of intent at the beginning of the process.

While these adjustments were initially made to reach disabled young people in particular (part of a wider cohort of non-disabled fellows), we realized that adopting universal design principles benefited everyone and they needed to be included in all fellowship initiatives.[43]

Once we reviewed the applications received, we asked ourselves if the fellowship applicant pool was representative of the community we sought to engage with; we wondered who was missing or underrepresented and why individuals notionally identified as potential fellows did not apply or did not complete the application?

For this fellowship, after reflecting on these questions with the first pool of applicants received, we decided to reopen the call. In retrospect, after meeting and becoming more familiar with the work of disability justice organizations and activists in the United States, we recognized that we could and should have adopted a disability justice framework from the onset.

Establishing a Participatory Fellow Selection Process

The committee should include a limited number of members of staff from the funder organization (to balance power dynamics), as well as representatives from the community the fellows come from, including youth representatives.[44]

Engaging young people as experts and advisors

To ensure that we create effective and ongoing youth participation, funders should move away from one-off consultations that risk resulting in tokenism, and aim to engage children and young people in ongoing processes.[45] Throughout this guide, we offer some advice, based on our experience, on how to partner with youth activists (see section 5: Supporting Fellows). The "nine basic requirements for effective and ethical participation" outlined by the Committee on the Rights of the Child (General Comment no. 12), "The right of the child to be heard" are an essential starting point to thinking about youth engagement and can be a tool for planning and monitoring quality participation processes with children and youth.[46] According to the nine principles, participation should be transparent and informative, voluntary, respectful, relevant, youth-friendly, inclusive, supported by training, safe and sensitive to risk, and accountable.

When inviting young people to be, for example, youth advisors, it is ideal to collaborate with groups and networks of young people who may nominate the youth through democratic processes. Also, the role and any expectations of the young people within the fellowship initiative must be clearly explained. For example, we made them fully aware that one of the limitations associated with an advisory role was that they became ineligible to apply for the fellowship, for equity reasons.

Careful consideration should be given to the advantages and disadvantages of engaging youth as advisors, always upholding principles of "do no harm".[47] When acting in a voluntary capacity, efforts should be made to reimburse expenses so that youth do not pay out-of-pocket in order to participate.

Although these principles aim to engage children and young people, they can also provide guidance for engaging with other community members.

Refer to section 5.2: Mentorship and peer support for more information on safeguarding policies and procedures.

3.2 New fellow orientation

We found that holding meetings at the beginning of the fellowship period was essential for fellows, funders, and participants (i.e., mentors, hosts, trainers) to build a culture of transparency and to understand their respective roles, responsibilities, and expectations by:

- Sharing guidance and tools with fellows to support planning, preparing, and adapting to change during the project implementation phase.
- Creating a space for the fellows to get to know one another—and ideally find synergies in respective projects—and become more familiar with the funder.

Depending on program budget and capacity, as well as health and safety considerations, in-person new fellow orientations may not be desirable or feasible. Some colleagues might choose online orientations instead to limit costs, protect health, increase accessibility, and advance climate justice values.

Whether online or in person, we highly recommend that the new fellow orientation occur *before* fellows begin their projects, so the fellow becomes more comfortable with their own understanding of grant expectations, whom to approach regarding challenges and opportunities, fellowship-related communications considerations, and important funder-specific legal restrictions on project activities, if applicable.

Key considerations for planning a new fellow orientation for youth fellows

Positive practices should guide planning with respect to these areas:

Co-creation of the orientation: Fellows should be co-creators of the agenda of the orientation and should co-facilitate (ideally in pairs) to help foster a sense of ownership.[48] Consider co-facilitation both in person and online.[49] If possible, allow space for fellowship alumnx to share their experiences at the orientation (in person or through pre-recorded videos or online dial-in).

Hiring a local facilitator, experienced in working with young people, to help with the design of the orientation could also be useful to further anchor the experience in the region.

Choice of venue (if in person): Host the orientation in a country of focus (if the fellowship has a regional focus) and/or a place meaningful to the thematic focus of the fellowship. Venues/places selected for meetings reflect inevitable power dynamics. Some individuals might feel uncomfortable in funder-organized spaces and it is important to acknowledge these dynamics.

The location should be not only accessible but also comfortable and "neutral" for participants—for example not connected to any specific belief/faith, but at the same time offering cultural and religious accommodations. It should also be a family-friendly venue where childcare can be provided at the orientation. Before selecting a venue, allow fellows to provide feedback on potential locations and be prepared to change your intended venue if the space—or ideological, political, religious or spiritual associations with the space—invokes discomfort or unease.

Support the community by using local vendors (if in person): Local vendors can also be hired to arrange cultural and historical trips and experiences rooted in regional history and/or activism to reflect and highlight local perspectives, history, and voices.

Accessibility

Ask participants well in advance what accessibility and accommodation support/s they will need. It is often necessary to conduct a pre-orientation site visit to confirm the accessibility of the physical spaces and availability of crucial amenities such as inclusive bathrooms. The Autistic Self Advocacy Network and European Disability Forum offer great guidance for accessible meetings.[50] Accessibility measures should include providing pre-work well in advance and ensuring that all fellows understand expectations related to participation.

Virtual considerations (if online): A separate set of considerations should be adopted if the orientation will not be in person. Consider using an accessible online participation checklist or tips for virtual meeting accessibility.[51]

Safeguarding policies and procedures: It is important to make sure that safeguarding policies and procedures and codes of conduct are in place and shared with fellows, mentors, hosts, trainers, vendors, and program staff.[52] Fellows should have a safe space to ask questions and/or clarify any aspects of policies/procedures.

Involvement of community mentors/hosts: Continue to demonstrate the importance of the fellows' community by including hosts and mentors in the orientation so they can become familiar with the fellowship program and get to know the other participants.

Language justice: In orientation discussions, it is best to allow the fellows to decide their preferences for communication and participation.

Provide simultaneous translation and interpretation for the orientation if the working language of the funder is not the primary language of selected fellows. Everyone should be able to use the language with which they feel comfortable. If most/all fellows speak the same language, consider hosting the orientation in that language, offering simultaneous interpretation in the working language of funder staff from outside the region. Ahead of the orientation, we recommend you share specific accessibility guidelines for orientation, Power Point presentations, and handouts with all facilitators.

Hold a pre-orientation meeting for consultants, vendors, interpreters/translators, and other orientation personnel: Everyone involved in the orientation should ensure that anti-racist and anti-ableist practices are consistently upheld. Staff should check that the content of training offered by external providers is aligned with program values.

Assessment: Each session is a valuable opportunity to assess the extent to which you achieved your goals for the sessions/activities/materials. The end of the orientation is also a time to receive feedback on best practices outlined here and invite suggestions regarding other best practices. At the end of the orientation, feedback can be collected through anonymous surveys, group feedback, and one-on-one or small interviews/check-ins. For group feedback, consider having an external facilitator collect group reflections.

4. FELLOWSHIP GRANT STRUCTURE

When working with individual grantees—especially activists at the earliest stages of their careers—it is important to think critically about what grant structure will most meaningfully support them.[53]

The three main grant structure options we have explored are:

1. Direct payment—fellow working independently[54]
2. Direct payment—host-based fellow
3. Indirect payment through a fiscal agent–fellow independent or host-based

Payment frequency is also an important consideration in all situations of direct payment to individual grantees. We recommend that payments be disbursed at least quarterly, especially for young activists. More frequent payments could benefit younger activists if the funder has this administrative capacity.

In this section, you will find descriptions of the three grant structure options together with guiding questions that could help funders initiate conversations with fellows and mentors to identify the most suitable option.

4.1 Direct payment—fellow working independently

How this works in practice: Financial resources are provided directly to the fellow in installments.

Recommended for: Fellows who have some experience receiving and managing similar size grants and/or will be working on a project that can be accomplished with a higher level of autonomy (e.g., a book or film). The fellow may still collaborate with a local organization or local activists in an unofficial capacity.

Questions to consider about direct payment:

- What experience does the fellow have receiving and managing grants similar in size and scope to the fellowship award?
- What are the pros and cons of the fellow working independently without a host organization? What support might the fellow need to be successful in their independent work?
- What are the pros and cons in terms of the fellow finishing the project in a context of limited structured connections?

4.2 Direct payment–host-based fellows

How this works in practice: Financial resources are provided directly to the fellow, who will conduct their project work in formal association with a host organization.

Recommended for: Fellows working on projects related to grassroots or community organizing, movement building, or campaigning. This option can better connect fellows to the movement and the work of the host organization may also create mutual benefits.

Questions to consider about host organization placement

- Would the fellow and project benefit from a more structured work arrangement (e.g., more standard work hours, within an office space)?
- How would the fellow and the project benefit from a host placement? How will funders select a host organization to ensure genuine commitment to placement of a fellow (keeping in mind power dynamics when making host arrangements)?
- What is the level of trust between the different entities (funder, fellow, and host organization) and, if necessary, how can these entities deepen this trust?

Identifying the host organization

Host organizations can be identified via different methods. As one example, fellowship applicants might identify potential host organizations within their communities during the proposal or selection process. As another example, the funder might identify host organizations in advance of the call for proposals, either through an open call for proposals from interested host organizations or by directly identifying potential host organizations through a funder's network of grantees.

Regardless of the method used to identify the host organization, it is especially important to acknowledge power dynamics between funder and grantee, funder and host organization, and host organization and grantee.

Some of the selection criteria, which should be formally established, include: strong connections with the community, commitment to meaningful youth engagement through an equity lens and to support the fellowship project in a non-directive way.

The role of the host organizations

In our experience, hosts seek to support fellows for different reasons. Some acknowledged an acute need in their organization to be more inclusive of youth leadership. Others saw the fellow's project as directly tied to their work and/or mission. Still others have an existing relationship with the fellow and seek to continue working with and mentoring that individual throughout the grant period.

It is typically advisable for the funder organization to establish a contractual agreement with the host organization, outlining the expectations of host, funder, and fellow. It is important to ensure that the host organization understands that the fellow will be advancing their project as per the grant agreement with the funder, and will not be directed by or in an employment relationship with the host. In some cases, the funder may choose to resource the host organization (through a separate contractual agreement) to provide in-house mentorship to a fellow placed within their institution. The host organization may simultaneously serve as a fiscal agent (see next section on the fiscal-agent relationship).

Fellows and staff of host organizations should be provided with multiple opportunities over the course of the grant period to provide candid feedback to the funder on the placement relationship.

MEMO

FUNDERS SHOULD ALWAYS CONSULT WITH THEIR LEGAL AND/OR GRANTS DEPARTMENT TO DETERMINE WHETHER THE USE OF FISCAL AGENTS IS APPROPRIATE FOR A SPECIFIC PROGRAM.

4.3 Indirect payment through a fiscal agent—fellow independent or host-based

How this works in practice: Financial resources are provided to a fiscal agent, or a fund distribution intermediary that administers scheduled payments to the fellow.

The role of fiscal agent can be undertaken by a third party the funder has engaged with in the past, or a trusted grantee organization with the relevant capacities. Sometimes, a host organization may act as fiscal agent, in which case the fiscal agent must sign a contractual agreement with the funder, in addition to a host organization contractual agreement. The fiscal agent can also be a separate organization from the host, administering payment to a fellow hosted within an organization or working independently. Funders should always consult with their legal and/or grants department to determine whether the use of fiscal agents is appropriate for a specific program.

Recommended for: cases in which the fellow is at an early career stage or cases in which the fellow has not previously managed such a large sum of money—a concern typically raised by the fellow. In such situations, a fiscal agent may have the ability to distribute fellowship payments directly to the fellow on a more frequent basis than the funder's administrative capacity would allow (e.g., on a monthly or bi-weekly basis).

The funder considers it more efficient to outsource the administration of grant payments and other financial obligations of the grant (e.g., professional development, travel reimbursement, alumnx support) to a third-party organization.

While funders may seek to compensate a fiscal agent to cover direct and indirect costs of administration, such compensation must be in addition to and distinct from fellowship award payments, which must be fully disbursed to the individual grantee.

In any scenario in which a fiscal agent will receive compensation, the funder must formalize a contractual agreement establishing expectations and terms of payment and administration. Fiscal agents must sign the grant letter alongside the grantee to ensure that both parties have agreed to clearly articulated roles and responsibilities.

Questions to consider about fiscal agent engagement:

- How might the fellow and their project benefit from more frequent payments?
- What are the pros and cons of your program outsourcing financial and grant administration (e.g., more time for other areas of the fellowship such as cohort building, mentorship, and holistic support)?

5. SUPPORTING FELLOWS

This section contains some reflections and suggestions on how to support fellows holistically, through a healing justice approach.

5.1 Healing justice

Many former youth fellows shared that a driving factor underpinning their commitment to social justice work was personal lived experience of the challenges and unjust policies, practices, and systems their project sought to address. We felt honored and moved when our fellows shared their experiences with us and we recognized the impact of trauma both on the individual and on the collective across generations. As a result, we felt it was crucial to support, within the fellowship, a healing justice approach that focuses on the collective safety and well-being of individuals and communities as a necessary part of sustainable organizing and movement work.[55] Healing practices are part of an overall approach and include several elements and components. They do not follow a "one size fits all" model and they look different according to the place and community where they are adopted.

In an effort to embrace this approach, we decided to look inward at our team's funding practices. This meant, for example, creating conditions for project flexibility to allow fellows to respond to unanticipated challenges, extending fellows' project timeline, offering additional healing justice support, and/or pausing the grant until they were ready to return to the work.

Extending the fellow's timeline can have different implications for grant payments, cost or no-cost extensions, and other factors that need to be assessed by each organization.

Unanticipated changes in the operational environment

"The first challenge I encountered during the fellowship was, without a doubt, [the hurricane that hit my community]. This changed the direction of the project entirely. At first, I was planning to conduct research that was going to be made into a documentary for publication. However, with the devastation, the crisis, and the disconnectedness we went through, it became unthinkable in terms of time and resources to conduct any research. In the wake of the hurricane's destruction, we saw that women and children, who were the people most affected, were abandoned by the state in different ways."

— Former Youth Fellow, 2017–2019

We also made an effort—in response to the fellows' feedback about feeling overwhelmed by traditional narrative and financial reporting— to minimize the volume of reports requested, and to assume a flexible approach to reporting formats and timelines. Overall, it is important that funders ensure fellows feel comfortable with the reporting process. We found it useful to do the following:

- Offer space and time for calls with each fellow to answer their questions about reporting.
- Provide fellows with the opportunity to submit draft reports to program staff for comments and feedback prior to final submission.
- Work with fellows to identify reporting deadlines that work for them.

See also language justice practices (section 3: From Fellowship Launch to Orientation).

In addition to looking at our own practices, we also supported healing practices to enable the fellows to deal with grief and trauma, such as healing circles, bodywork. All these practices, decided by the fellows or with their full consent, aimed at supporting the individuals and the collective, since healing justice "unlocks more power for ourselves and our organizations. It is about recovering our life, creativity, and connection. When we do the work of healing, we unlock strategies, ideals, and emotional capacity that were held captive in our trauma."[56]

Trauma and resilience

"Having to deal with three deaths this summer between my cousin overdosing, my uncle succumbing to cancer, and my friend being murdered the day before his daughter's first day of school has just made focusing on myself, my health, and my project more difficult. Just finding the spirit to remain positive and remembering to grieve and take care of myself proved to be a great challenge, but the support of [the other] fellows and [a leadership coach] has been the one thing that is present in my life that wasn't before and that has allowed me to remain resilient."

— Former Youth Fellow, 2017–2019

From the practitioner who supported the fellows in the United States:

"The goal of group work was to identify and draw from the wisdom of each fellow in order to serve the whole. The fellows were able to develop ways to support each other during their 18 months together. They learned from each other's stories, struggles, both personally and professionally, and explored their complexities and diverse backgrounds. Through this connectivity, the fellows were able to create a network to

exchange ideas, tools, and emotional support during the development of their projects, and to continue to grow as leaders so they could better serve their communities. They were able to utilize, both in themselves and their community, the following five principles: (1) to lead with a non-shaming heart; (2) to explore what they do not know and build the capacity to accept this, both within themselves and their communities; (3) to be willing to change and to be changed for the better, especially when they are in new territory; (4) to acknowledge multiple perspectives and know how to hold all of it in a room they are leading; (5) to say yes to everything in a way that gives them options that serve them".[57]

Finally, we learned that there is no healing justice without disability justice: healing justice is not about imposing an ableist notion of how bodies and minds should be. On the contrary, healing justice is a self-determined process, one that enables us to be brought more into ourselves and our true expression.[58]

5.2 Mentorship and peer support

Mentorship is one of the most important aspects of the fellowship experience, according to many former community youth fellows. Mentors can act as connectors, sounding boards, and advisors and they should be familiar with the issue and/or the geographic location of the fellowship project work. Fellows may have multiple mentors, but here we are referring to a specific "project mentor."

Ideally, each fellow should choose a mentor from their community/network, identifying someone with the background and experience most relevant to their project needs. The funder should help facilitate these connections when necessary. Fellows should be able to change mentors, if needed.

Once mentors are identified, they may be hired, for a specified number of hours per month, directly by the funder, as was our case at the Open Society Foundations, or they may be resourced through alternative channels, such as adding mentorship costs to the fellow's project budget or resourcing a host organization agreement to include mentorship costs.

It is important that the mentors attend the fellow orientation and possibly other major cohort events, so that mentors and fellows have clear expectations and understand that the mentorship role is not directive or task oriented. In our experience, the funder should consider tapering off the frequency of structured mentorship over the fellowship grant period as fellows develop their own capacity to seek mentors.

It is important to ensure that safeguarding policies and procedures and codes of conduct are in place when mentors are hired.[59]

In addition to project mentors, we received extensive feedback from youth fellows about the value of peer support and of creating opportunities to build a sense of shared purpose and connection.

Given that in-person cohort meetings can be costly in terms of human and financial resources, and there may be health and safety concerns as well, we found it extremely important to create the conditions for digital connections. For example, fellows created "fellows-only" video calls where they co-created the agenda, decided on the guiding principles on how to treat each other, and took turns as facilitators (with options for co-facilitation by pairs of youth).[60]

Facilitating Connections

"The opportunity to meet and connect with my other fellows has transformed who I am and my responsibility to my community. Just hearing and learning about their stories and challenges and feeling so close to them opened my entire scope to issues outside of my own slice of life."

— Former Community Youth Fellow, 2017–2019

In general, it is good practice to ask fellows how they prefer to communicate and which platforms would provide comfort and security. Some fellows may choose to connect via secure or encrypted communication apps. Accessibility considerations are always important (see Section 3.2: New fellow orientation).

It is also important to facilitate connections within and between fellow cohorts. These connections serve as important places for peer learning and exchange, and build and strengthen networks of current fellows and alumnx.[61]

5.3 Supporting Alumnx

In our experience, we were very clear with each fellow from the beginning that the grant was for a fixed period and that continued project and/or organization funding beyond the scope of the fellowship would not be considered.[62] In this case, funders could offer training and mentorship to the fellows to plan for the transition. Also, throughout the course of the fellowship and especially as the fellowship nears conclusion, funders should provide connections to

professional networks and programs and relevant individuals. These are all forms of individual support that benefit the community too.

Fellows often indicate interest in playing a role in future fellowships and connecting with future fellow cohorts. Depending on their availability and the nature of their interest, they could participate in new fellow selection committees and/or cohort events, promote the fellowship and support outreach for future calls for proposals, or serve as a mentor/resource to new fellows (the alumnx funding clause mentioned below is also useful for resourcing such initiatives).

Programs may choose to create and maintain an alumnx council to coordinate efforts to create maintain engagement between current and former fellows.

Open Society Youth Fellowship grant letter alumnx funding clause

To make it possible for the funder to support alumnx to attend funder-sponsored or external events such as conferences, workshops or courses and also for other ad-hoc opportunities, we included an alumnx funding clause in the grant letter. This also can help the funder and the grantee view the relationship as a longer-term commitment that goes beyond the grant period.

Up to three years after the Fellowship Term, you may request funding to attend professional conferences, academic colloquia, trainings, symposia, seminars, or other events related to your field of study or critical for your professional development. Pending availability of funds, the Open Society Youth Fellowship Program may fund all or part of your request if it determines that the proposed event would offer you important educational and professional networking opportunities, allow the exchange of ideas with colleagues, and support your professional development in line with the goals of the original Fellowship.

6. FINAL THOUGHTS

"I feel the project I worked on was a positive beacon in a time when the community was left divided and bitter. Eastern Kentucky is a region famous for its media coverage. This region is famous for being exploited through articles detailing our poverty but not our struggle or success. This area is viewed often through an outsider's lens. [The project] brought hope and resources to people who had never told their own stories. It brought together discussions, events and a place for the community to feel safe that openly displayed pride flags would showcase its welcoming nature rather than keeping it hidden. I feel the project has become a movement and will lead to more in the future. In one way or another, the project will survive and thrive."

— Former Community Youth Fellow, 2017–2019

The Youth Exchange was a time-bound experimental program (2016–2020). We launched the Community Youth Fellowships in 2017 with a clear vision: to identify and support youth through an equity lens.

Our practices and approaches have continued to evolve as we learned from fellows, activists, mentors, hosts, colleagues, and other funders. One key lesson that became clear to us was that young people are too often chosen and supported when they act and communicate in accordance with funders' expectations. As funders, we need to flip the script and ask, "How can we meet and support young people where and as they are?" We wanted our fellowship model to be a platform for young people to come as they are and to thrive because of their experiences, identities, and inherent value.

We would like to continue to work to ensure that non-dominant identity markers are not predictors of how young people, and people in general, are treated and supported. We are moved by these individuals who continue to fight every day for their communities.

We believe the best way to ensure that every youth fellowship initiative is rooted in the advancement of equity is to listen to, amplify, and respect the voices, experiences, and perspectives of young people from impacted communities as agents of change.

We learned the importance of applying a holistic perspective. This means honoring the intersections of commitment to social justice work and personal experiences as powerful starting points for addressing the unjust policies, practices, and systems that may propel people into activism.

We also learned a lot about ourselves as individuals and funders, and have had to grapple with our own tendencies to default to internalized and hard-wired practices. We learned how important it is to require ourselves to be intentional and consistent about challenging discrimination, racism and anti-Blackness, and ableism. We are aware of how much work remains to be done, by us and by others, to dismantle the institutionalized power that pushes impacted communities to the margins of grant making and replicates systems of oppression.[63]

Although the Youth Exchange closed at the end of 2020, we hope this guide will help ensure that the inclusion of young people through DEI practices becomes the norm when supporting young activists.

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Rachele has a first degree with distinction from the University of Bologna, Italy, and a PhD from University College London, United Kingdom.

Zack Turk was a program officer with the Open Society Foundations' Youth Exchange. He has been working at Open Society since February 2016, and focuses on supporting youth activists at the earliest stages of their career through individual youth fellowships, as well as working in collaboration with Open Society programs and foundations that seek to engage youth more intentionally as part of their broader strategies. Prior to joining Open Society, Zack worked as a grants officer with CIVICUS: World Alliance for Citizen Participation.

Zack holds a BA in international studies from Kenyon College and an MPP from the University of Michigan Gerald R. Ford School of Public Policy, United States.

USEFUL RESOURCES

The resources below are not an exhaustive list, but are provided to support additional learning on some of the topics discussed in this guide.

A. On Racial Bias in Philanthropic Funding

Dorsey, Cheryl, Peter Kim, Cora Daniels, Lyell Sakaue, and Britt Savage. "Overcoming the Racial Bias in Philanthropic Funding." *Stanford Social Innovation Review,* May 4, 2020. https://ssir.org/articles/entry/overcoming_the_racial_bias_in_philanthropic_funding# (accessed October 27, 2020).

Dorsey, Cheryl, Jeff Bradach, and Peter Kim. "Racial Equity and Philanthropy Disparities in Funding for Leaders of Color Leave Impact on the Table." *The Bridgespan Group,* May 2020. https://www.bridgespan.org/bridgespan/Images/articles/racial-equity-and-philanthropy/racial-equity-and-philanthropy.pdf (accessed October 27, 2020).

Zakaras, Michael D. "US Social Innovation: Let's Redraw the Map." *Ashoka,* September 7, 2016. https://www.ashoka.org/en-us/story/us-social-innovation-lets-redraw-map (accessed October 27, 2020).

B. Disability Language

Liebowitz, Cara. "I am Disabled: On Identity-First Versus People-First Language." *The Body is Not an Apology,* March 20, 2015. https://thebodyisnotanapology.com/magazine/i-am-disabled-on-identity-first-versus-people-first-language/ (accessed October 27, 2020).

Shakespeare, Tom. *The Disability Reader: Social Science Perspectives.* Cassell, 1998.

C. Disability Justice

Berne, Patty. "Disability Justice–a working draft by Patty Berne." *Sins Invalid,* June 9, 2015. https://www.sinsinvalid.org/blog/disability-justice-a-working-draft-by-patty-berne (accessed October 27, 2020)

Mingus, Mia. "Changing the Framework: Disability Justice." *Leaving Evidence,* February 12, 2012. https://leavingevidence.wordpress.com/2011/02/12/changing-the-framework-disability-justice/ (accessed October 27, 2020).

Morales, Aurora Levins. *Kindling Writings on the Body.* Palabrera Press, 2013.

Piepzna-Samarasinha, Leah Lakshmi. *Care Work: Dreaming Disability Justice.* Arsenal Pulp Press, 2018.

Sins Invalid. "10 Principles of Disability Justice." *Sins Invalid,* September 17, 2015. https://www.sinsinvalid.org/blog/10-principles-of-disability-justice (accessed October 27, 2020).

Sins Invalid. *Skin, Tooth, and Bone: The Basis of Movement is Our People. A Disability Justice Primer. Second Edition.* Sins Invalid, *2016.*

Wong, Alice (ed.). *Disability Visibility: First Person Stories from the 21st Century,* 2020.

D. Diversity, Equity and Inclusion

The Annie E. Casey Foundation, "Race Equity and Inclusion Action Guide." *The Annie E. Casey Foundation,* January 8, 2015. https://www.aecf.org/resources/race-equity-and-inclusion-action-guide/ (accessed October 27, 2020).

Association of Charitable Foundations. "Diversity, Equity and Inclusion: The Pillars of Stronger Foundation Practice." *Association of Charitable Foundations,* 2019. https://www.acf.org.uk/downloads/ACF_DEI_Thepillarsofstrongerfoundationpractice_final.pdf (accessed October 27, 2020).

Chow, Barbara. "From Words to Action: A Practical Philanthropic Guide to Diversity, Equity, and Inclusion." *GrantCraft,* 2018. https://grantcraft.org/wp-content/uploads/sites/2/2018/12/Words_to_Action-_Barbara_Chow.pdf (accessed October 27, 2020).

Lemma, Solomé and Jennifer Lentfer. "Racism and International Philanthropy: How Little Practices and Big Resource Flows Are Connected." *Thousand Currents,* October 29, 2018. https://medium.com/@1000Currents/racism-and-philanthropy-how-little-practices-and-big-resource-flows-are-connected-e8c325f09c24 (accessed October 27, 2020).

Putnam-Walkerly, Kris and Elizabeth Russell. "What the Heck Does 'Equity' Mean?" *Stanford Social Innovation Review,* September 15, 2016. https://ssir.org/articles/entry/what_the_heck_does_equity_mean (accessed October 27, 2020).

Sen, Rinku and Lori Villarosa. "Grantmaking with a Racial Justice Lens. *Philanthropic Initiative for Racial Equity (PRE) and GrantCraft,* January 2007. https://racialequity.org/wp-content/uploads/2020/01/GWARJL_15.pdf (accessed October 27, 2020)

E. Youth and Child Participation

Creative Commons. "Participation Models: Citizens, Youth, Online. A Chase through the Maze." *Creative Commons,* July 2011. https://www.nonformality.org/wp-content/uploads/2011/07/Participation-Models-20110703.pdf (accessed October 27, 2020).

Crowley, Anna and Dan Moxon. "New and Innovative Forms of Youth Participation in Decision-Making Processes." *Council of Europe,* October 2017. https://rm.coe.int/new-and-innovative-forms-of-youth-participation-in-decision-making-pro/1680759e6a (accessed October 27, 2020).

Farrow, Alex. "Children, Young People, and Participation. Youth Policy Working Paper No. 3." *Youth Policy Labs,* July 2016. https://www.youthpolicy.org/library/wp-content/uploads/library/Youth_Policy_Working_Paper_03_201607.pdf (accessed October 27, 2020).

Gozdzik-Ormel, Zaneta. *Have Your Say! Manual on the revised European Charter on the Participation of Young People in Local and Regional Life.* Council of Europe Publishing, November 2015. https://rm.coe.int/16807023e0 (accessed October 27, 2020).

F. Accessibility

A list of important resources on accessibility and event planning, accessibility and activism, and disability justice from the Access is Love project website can be found here: https://docs.google.com/document/d/1TY9k_S0oLUVXEhI1FdmT8yaG_28cbcBStuyM9wXag6k/edit.

Additional accessible event planning information can be found in these publications:

European Disability Forum. "Accessible Online Participation Checklist." *European Disability Forum,* March 24, 2020. http://www.edf-feph.org/newsroom/news/accessible-online-participation-checklist (accessed October 27, 2020).

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G. Healing Justice

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3   Some of the concepts mentioned in this guide– like Disability Justice—are used primarily in the United States, whereas certain practices, such as language justice, are already used in other countries.

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5   In this document, we use "identity-first" language, but we acknowledge the debate about the use of people-first language and identity-first language. In many parts of the world, disability activists prefer to say and write "person with disability" rather than "disabled person." This is because they prefer to put the person before the disability. For them, "disabled person" can reinforce negative attitudes and perpetuate discrimination. However, other disability rights activists prefer "disabled person," because they adopt and advocate what is known as the social model of disability. See Useful Resources, B.

6   Our definition builds on the one offered by the Open Society Foundations' Grant Making Support Group: "**Diversity** is the intentional variety within a specific collection of people that takes into account intersectional elements of human difference, identity and lived experience. Within this group, we suggest paying particular attention to groups that are often subjected to structural forms of discrimination, exclusion and oppression across the globe, including but not limited to: the intersections of racial and ethnic groups, LGBT populations, people with disabilities, women, religious groups and people of low socio-economic status. A diverse group is not necessarily inclusive or equitable. **Equity** means securing just outcomes for people by taking into account historical and existing systems of oppression (including policies, processes, and distribution of resources) and working to dismantle them. **Inclusion** represents ensuring all people—especially communities that have been systematically excluded or prevented from having a say in the structures of power—have full, meaningful participation in all levels of human interaction, especially decision-making—within a group, organization, movement, or society. While a truly inclusive group is necessarily diverse, a diverse group may or may not be inclusive."

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