



Collaboration Case Note

Collective Funder Voice

March 2021

TAI seeks to foster collaboration between two or more members around our shared strategic priorities. Collaboration case notes document and assess the utility of such initiatives from the funder perspective.

What Problem(s) Were We Addressing?

TAI members, as leading funders in the transparency, participation, and accountability (TPA) space, use their individual institutional "voices" in different ways to advance TPA work. A Collective Voice Working Group (CVWG) was formed in early 2020 to explore whether and how members could use the TAI platform to enhance impact on TPA issues by speaking with one, shared voice. There was some initial confusion around the CVWG's specific objectives. Most respondents perceived a split focus on advocacy and communications versus bringing new funders into the TPA space.

"There's this whole school of thought that it's not our place to interfere, and we should just be giving the money and stepping back and using TAI more for learning, self-reflection, research, etc. I think that is the more traditional understanding of how we should work with each other as opposed to thinking how we can put our collective weight behind something."

-Funder member

Who Collaborated and How?

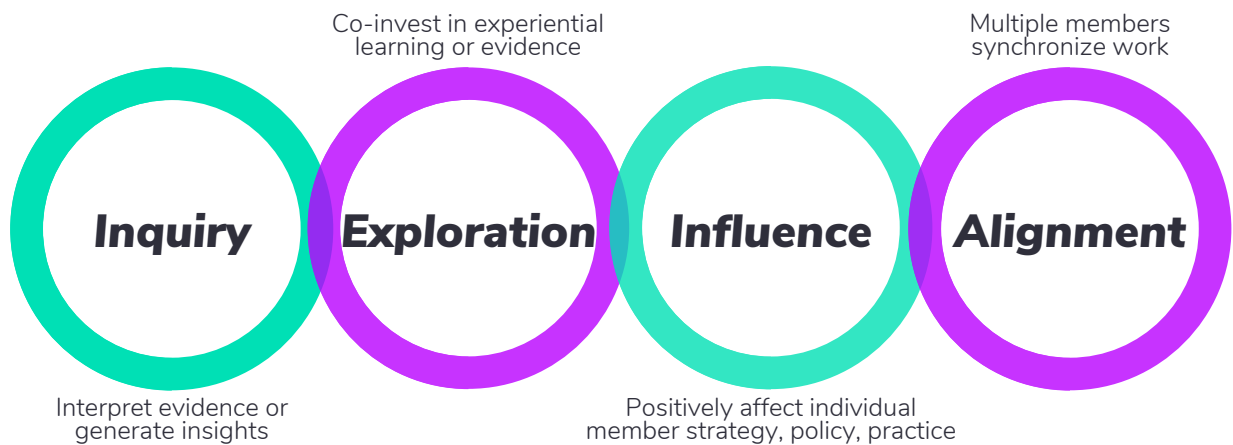
All TAI members, including new associate member Chandler Foundation (Chandler), were represented in the CVWG, although some members participated more actively than others. Chandler and Open Society Foundations co-chaired the group, which collaborated primarily through monthly, and later bimonthly, virtual calls. Ahead of each working group meeting, the co-chairs and Secretariat held calls and exchanged emails to prepare and circulate an agenda and any relevant documentation for review and comment by other group members.

The Secretariat coordinated call scheduling, facilitated calls in real time, and took and circulated meeting notes. CVWG members used an email list serve and WhatsApp group for more ad hoc communication on specific issues or opportunities. The Secretariat also spearheaded most strategizing around outreach to non-member TPA funders and consulted CVWG members on their personal or institutional connections to support these efforts.

What Type of Collaboration Was It?

This collaboration focused on TAI members influencing each other and other actors, including, but not limited to, other funders (influence).

TAI Collaboration Spectrum



How Did the Collaboration Evolve?

In 2019, TAI commissioned an evaluation to reflect on its progress and inform its 2020-2024 strategy. This process and the resulting strategy, as well as the occasion of TAI’s 10-year anniversary, prompted a discussion among members on how the TAI platform could have a larger influence beyond its current membership.

At the February 2020 TAI member retreat, participants created the CVWG as a means to more systematically determine purpose for, and identify risks and opportunities associated with, collectively leveraging member brands. During the course of the year, as one funder member described it, the working group moved from a design to a piloting stage, followed by re-iteration and institutionalizing.

"There was a perception that we as funders use our power and resources to support organizations and support causes we believe in mainly through grantmaking and maybe other types of convening but that we...have a power in our hands that has not systematically and strategically been used - much less as a group, which is even more powerful than as individual foundations."

-Funder member

Each member nominated representatives to the CVWG, and monthly virtual meetings commenced in May. The group initially focused on establishing a unifying message and determining how collective decision making would take place. Because each TAI member institution has a different understanding of advocacy and threshold for engagement, this process took longer than anticipated.

The Secretariat conducted a survey and held discussions with 12 member grantee organizations. The purpose was to investigate grantee partner interest in a stronger funder voice and how this could add to, rather than drown out or substitute, the voices of practitioners. Broadly, grantee representatives expressed interest in funders using their individual and collective influence more often. They stressed that this action be grounded in contextual understanding of how that voice could be used and consideration of harm it might cause. These partners also suggested that funders leverage their power and connections to conduct more inside track negotiations with government actors and multilaterals, while keeping grantee work in the spotlight.

The CVWG developed and adopted a protocol determining the process and timeline for TAI, as a collective, to sign-on to campaigns and letters. In December, TAI's Steering Committee endorsed the proposal to make the CVWG a standing fixture.

Collaboration Milestones in 2020



What Have We Achieved?

By far the most important achievement, according to most respondents, was a clearer idea of what is meant by collective voice, and a process for intentionally determining when and how that voice can and should be used. As one funder member stated, "a common understanding is now there," and a shared interest in using TAI's influence has been established.

Several concrete products resulted from the collaboration, including:

- Members' grantee partner input collected and considered in defining opportunities and risks for use of TAI's collective voice
- Members and the Secretariat developed and began to implement the Collective Voice sign-on protocol - signing on to specific grantee letters or authoring complementary letters
- Shared priority messages documented for members to use in individual and collec-

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tive public voice op-eds or blogs

- Two articles on the importance of TPA initiated with the CVWG, one of which became a DevEx event to highlight the [role of civil society](#) in pandemic response, and the other, an [op-ed](#), was placed online with the Council of Foreign Affairs with member support.

Was the Collaboration Useful to Members?

Some members found the working group meetings a useful opportunity to share issue amplification efforts that all members could get behind. Several members felt this helped the group coalesce around inequality as an entry point common across TAI members, despite differing agendas and appetite for political engagement. "Even if at end of day TAI decides they don't want a collective voice, going through the process of unpacking why or why not was useful...for me it's a larger nudge around whether we see value in speaking as a collective," said one funder member.

Several members expressed disappointment that the group didn't weigh in substantively on some of the key issues of race and economic injustice laid bare by the COVID-19 pandemic. There was an "expectation of having some more concrete products, being...wiser, knowing better," said one member funder. "I was really hoping that we'd be able to take action on some big issues that could potentially have contributed," commented another.

"With large organizations, chain of command can make it difficult to act nimbly. [The CVWG] allowed us to be more quick and flexible...in the moment, which is so important if you want to lead."

-Funder member

Members did, however, express optimism that this could happen now that the group will continue indefinitely and build on the achievements noted above.

Nearly all members cited the sign-on protocol itself as useful because it has allowed TAI to be more active in using its voice. "It's incredible that TAI now feels that they have a mandate to sign on to things," shared a member. "Even if this was the only thing we did I would have been happy, because it helps us use the TAI brand more, using this group as a first stop shop." Establishing an intentional process through which TAI's voice could be used allowed responses to be nimbler and more flexible, and therefore potentially more relevant.

In some cases, members were able to use the collective TAI voice when they were unable to use their individual brand. In others, members were able to use TAI's collective sign-on to prompt their own organizations to sign on individually, and/or get high-level buy-in within their own institutions on certain topics. Several funder members wanted to see more regular engagement of institutional leadership to make them aware of the CVWG, so that the working group can make more high-level messaging asks. Other members were less likely to engage senior leadership, whether due to institutional structure, size, or political appetite, or the CVWG member's individual role.

Several members found the grantee survey particularly useful because it was conducted by the Secretariat. Members presumed grantees would respond to questions from a third party more openly than they would an individual donor; the survey therefore provided feedback members would not otherwise have received. "Asymmetries of power are always in

play, so interviewing the field for us is very useful," said one member. One member said the survey was a turning point for the group, because knowing that grantees welcomed a collective voice allowed working group members to feel more comfortable sharing advocacy opportunities.

Barriers to Collaboration	Enablers of Collaboration
Differing institutional priorities are difficult to put under one umbrella that all can support.	Some member institutional advocacy goals aligned well with the goals of the working group.
CVWG members had varying levels of decision-making authority for different purposes. Some felt this slowed the group down, affecting enthusiasm and engagement levels.	CVWG members were often directly involved in initiatives around issues that came to the group. Their real-time data about the field, actors, and planned meetings or conferences enriched meetings.
Members sometimes relied too heavily on the Secretariat's involvement and were therefore not as active or engaged as they could have been.	Member co-chairs engendered member ownership, while the Secretariat's convening and coordinating role supported forward momentum and regularity of meetings.
Differing interpretations of 'collective voice' meant politically minded members expected the group to use its voice more proactively through publications, events, or campaigns.	Goodwill among CVWG members helped smooth over differing strategic assessments regarding targets for influence, and level of engagement.
Finding language with which all members could agree diluted the specificity that could have made joint messaging more impactful.	Using the TAI platform helped some member institutions use their voice even when prevented from doing so individually by the bureaucracy of their own institutions.

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Lessons Learned

Clearly define group goals and language from the start. Some members felt that, instead of an intentional focus on, and goals within, the advocacy or communications realms, the

"Conceptually we are on the same page now, and we have also decided what were our key messages and issues, but it's a general message so we need to land these into concrete moments and issues."

-Funder member

group ended up doing both in an ad hoc manner. Some felt this lack of clarity around group objectives could have contributed to what most participants described as uneven engagement across working group members. Several respondents felt the group could have gotten to a common understanding more quickly had there been one or two **concrete, time-bound objectives** for the year framed around key dates, messages, and partners.

Nearly all members emphasized that differing interpretations of 'advocacy' led to frustration when it came to taking action around specific initiatives. Shared messaging offers opportunity for collective voice. And some members expressed interest in using that voice to influence and advance certain agendas. On the other hand, some members see the CVWG as a space for big picture strategic thinking about what TAI is trying to achieve, and how its members can work towards this more proactively. More time could, therefore, be spent to **clearly define terms**, even if there is a presumption of shared understanding.

Match group composition to purpose. Early uncertainty around the group's purpose meant some members weren't sure who to nominate from within their institution; this resulted in certain member representatives feeling ill-suited to their role on the working group. Some participants noted a greater emphasis on process than on content. CVWG members from institutions with dedicated communications teams, which typically handle sign-on letters and statements, felt they had little to offer on process. Most participants encouraged a re-evaluation of the CVWG's membership towards one more aligned with its focus on issue amplification and communications.

Allow for more direct communication with funder peers. Several participants felt that ad hoc sharing between working group members would be a more effective way of finding areas of overlap than the more formalized communication through the Secretariat. Some also commented that understanding their fellow working group members' incentives earlier, through channels like these, could have alleviated some frustration and misalignment.

Make transparency and accountability language more accessible. The technical language that is familiar to TAI members can seem exclusionary to actors less familiar with the field. As one member stated, "it's all inside baseball." If the goal is to bring others into the TPA field, some members encouraged a more intentional look at communications and branding with a focus on plainer, less jargon-y language.

Make better use of work products. One member described unused CVWG messaging, notes, and strategy work that could have been put to greater use or made more visible. Specific reference was made to a group messaging strategy developed early in the collaboration, as well as notes and output from a call on strategic litigation.