

# OSF FISCAL GOVERNANCE PROGRAM

## CLOSE-OF-PROGRAM EVALUATION

REVIEW OF GRANTMAKING PRACTICES

2013-2020



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# INTRODUCTION

As the world continues to combat the COVID-19 pandemic, grapple with the harsh realities of climate change, and mitigate the rise of nationalist agendas, the need for cross-sector, transnational commitments to greater openness, accountability, and equity in global governance norms and institutions remains salient than ever. Open Society Foundations (OSF) has demonstrated a long-standing awareness and commitment to tackling these issues.

**Namely, OSF's Fiscal Governance Program (FGP) was developed to address the ways in which corruption, plutocracy, and populism can undermine public finance management and economic policy-making in ways that hurt society's poorest and most vulnerable.**

FGP spanned from 2013–2020. Upon closure of this program, OSF commissioned Intention 2 Impact (I2I) to design and execute a multi-faceted and comprehensive close-of-program evaluation to explore the achievements of its Fiscal Governance Program (FGP) from 2013–2020, as well as capture lessons learned to inform future strategy and grantmaking practices.

**This report summarizes findings from I2I's review of OSF's grantmaking practices during the tenure of the Fiscal Governance Program.**

Launched in 2013, the FGP emerged as a thematic funding program intended to consolidate existing grants related to transparency, accountability, and anti-corruption as well as build on this portfolio with a broader strategy to ensure that public resources are used efficiently, effectively, and with accountability to benefit those who need them most.

Over its lifespan, the FGP mission promoted greater openness, accountability, and equity in the fiscal and economic systems globally. While the mission remained the same, the overarching strategy of the program adapted over time. In 2017, FGP developed a revised strategy focused on several main portfolios of work, including: **natural resource governance, anti-corruption, open government reforms, tax, public budgets, and trade governance.**

With this strategy, there was an increased emphasis on learning and understanding impact for FGP and its grantees. Additionally, the FGP team made their strategy publicly available in an effort to align with their strategic prioritization of transparency and access to information.

**Over its seven years of operations, FGP deployed over \$140 million in grants to 127 organizations and an additional \$2.6 million in direct contracts. The majority (55%) of these resources were invested in the field of natural resource governance (for more on this portfolio, please read the NRG report).**

# FGP THEORY OF CHANGE

FGP employed several Theories of Change (ToC) over the years, both at the strategy and portfolio levels. They were nuanced and complex, serving as important tools to assist with strategy implementation and learning. Ultimately, FGP staff decided not to maintain a comprehensive ToC for the program as a whole, and retain only portfolio-level models.

Across the ToCs, FGP maintained focus on several goals and outcomes:

- 1.** Increase equitable and inclusive participation and transparent governance of economic and fiscal systems
- 2.** Increase accountability of regulatory regimes and the management of public finances and resources to affected populations
- 3.** Increase adoption of evidence-based fiscal and economic policies that are effective, inclusive, and promote equity
- 4.** Improve resilience and health of fiscal governance fields, especially the capacity and leadership of our grantees in their domains.

To achieve these outcomes, FGP committed to a multitude of actions, including:

- Providing sustained, targeted, and strategically curated grant support to international and local NGOs with proven track records in fields of shared interest
- Supporting collaboration among grantees
- Coordinating deliberate convening to build momentum for specific issues areas
- Promoting grantee capacity building and organizational health
- Providing grantees with the flexibility to manage adaptively
- Sharing FGP perspectives and current information on the fields with grantees

# FGP'S STRATEGIC GRANTMAKING VISION

FGP's vision for grantmaking was an essential facet of their overarching theory of change. In this vision, strategically curated grantmaking fortified the capacity and health of grantee organizations and thus improved the resilience and health of fiscal governance fields. In turn, resilient and healthy fiscal governance fields undergird the proliferation of higher-order impacts related to transparency, accountability, and equity.

As such, the FGP team strategically designed various grantmaking practices that fit into four overarching typologies of support:

## 1. FINANCIAL SUPPORT

- Core/General Support: funding broadly granted to an organization, without stipulation for how it must be used
- Program-level support: funding earmarked for specific programs within an organization
- Project-support: funding granted for a specific project, such as a research study

## 2. TECHNICAL SUPPORT

- Strategy design consultation
- Monitoring, Evaluation, and Learning (MEL) advice and training
- Communications and social media consultation
- Use of OSF voice or platform to communicate issues
- Organizational and operational advising
- Contract management

## 3. THOUGHT PARTNERSHIP SUPPORT

- Disseminating research
- Sharing expert opinions
- Commissioning research or project work to overcome field challenges or meet new opportunities
- Engaging in strategy conversations

## 4. NETWORKING SUPPORT

- Hosting convenings
- Forging connections between civil society organizations (CSOs)
- Providing access to decision-makers
- Making introductions to other funders

Across all grantmaking practices, FGP adopted a grantee organization-centered approach, aimed to “be a partner, more than a donor,” and sought to enact practices that were rooted in their value. **Flexibility, responsiveness, transparency, and equity were all guiding values that informed the strategic vision for grantmaking during FGP's tenure.** We use these four values as benchmarks to inform the overall assessment of FGP's grantmaking strategy in the final portion of this section.

# FGP'S STRATEGIC GRANTMAKING IN PRACTICE

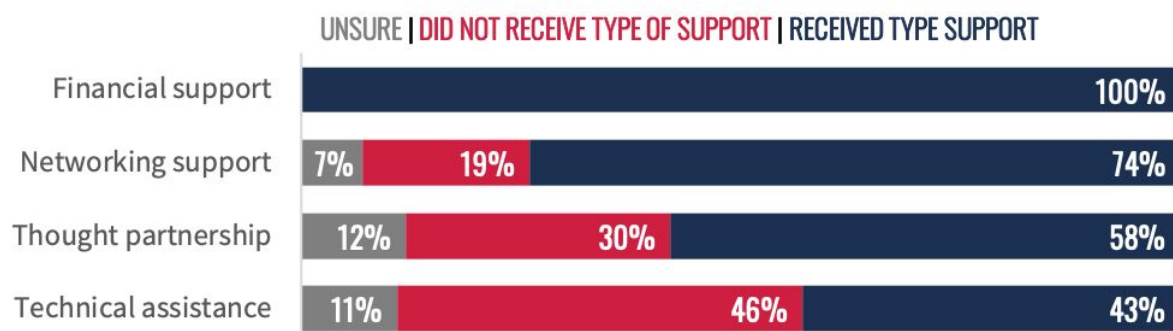
## KEY FINDINGS

- According to grantee survey data, the most commonly received FGP grantmaking support besides financial support was networking support (74%), followed by thought partnership (58%), and technical assistance (43%).
- Core/general support was rated by grantees as the most valuable financial support practice, due to the maximum flexibility it afforded grantees. However, program/project level support also was deemed as valuable.
- There were certain types of support (e.g., providing access to decision-makers or governments) that very few grantees took advantage of. For those who did, the value of such support was highly variable. This finding suggests the potential to formalize support practices and strategize more uniform ways to provide a more consistent experience for grantees.

First, we explore how financial, technical, thought partnership, and networking support took shape during FGP's lifespan. Then, we link these practices to actual organizational and field health outcomes that emerged from the data.

While all grantees partner organizations received some form of financial support, there were varying combinations and degrees of technical support, thought partnership, and networking support allotted to grantee partner organizations. Grantee survey data illuminate the types of support grantees perceived they received from FGP.

**The majority of grantee partners received networking support and thought partnership, while less than half received technical assistance.**

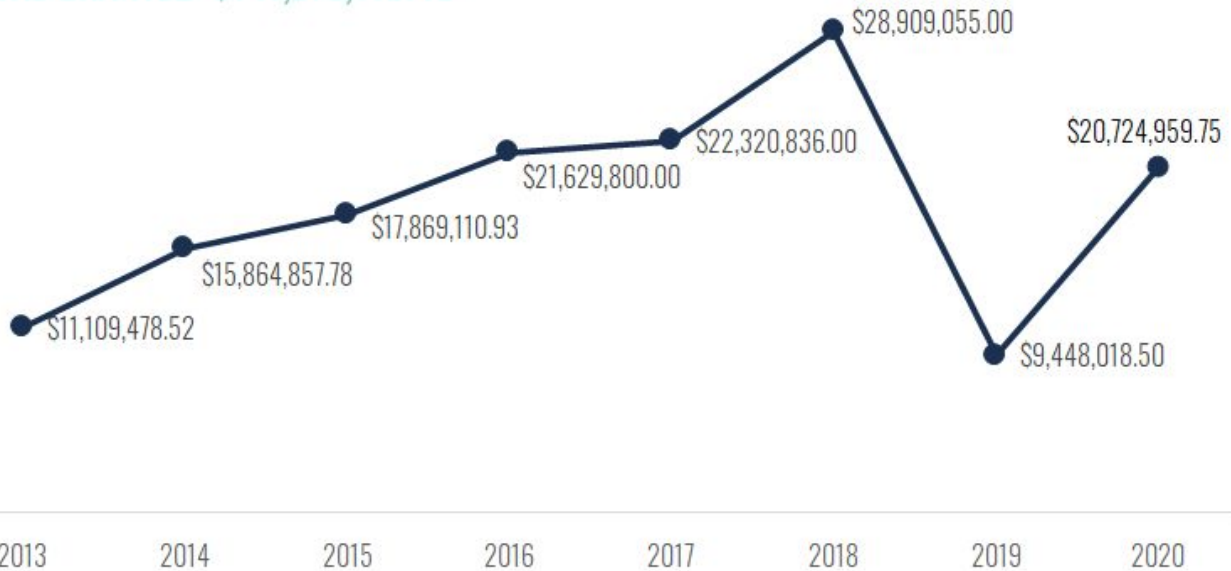


# FINANCIAL SUPPORT

Financial support was the marquee category of grantee support provided by FGP. Since 2013, FGP provided a total of **\$147,876,116 grants** to 127 grantee partners.

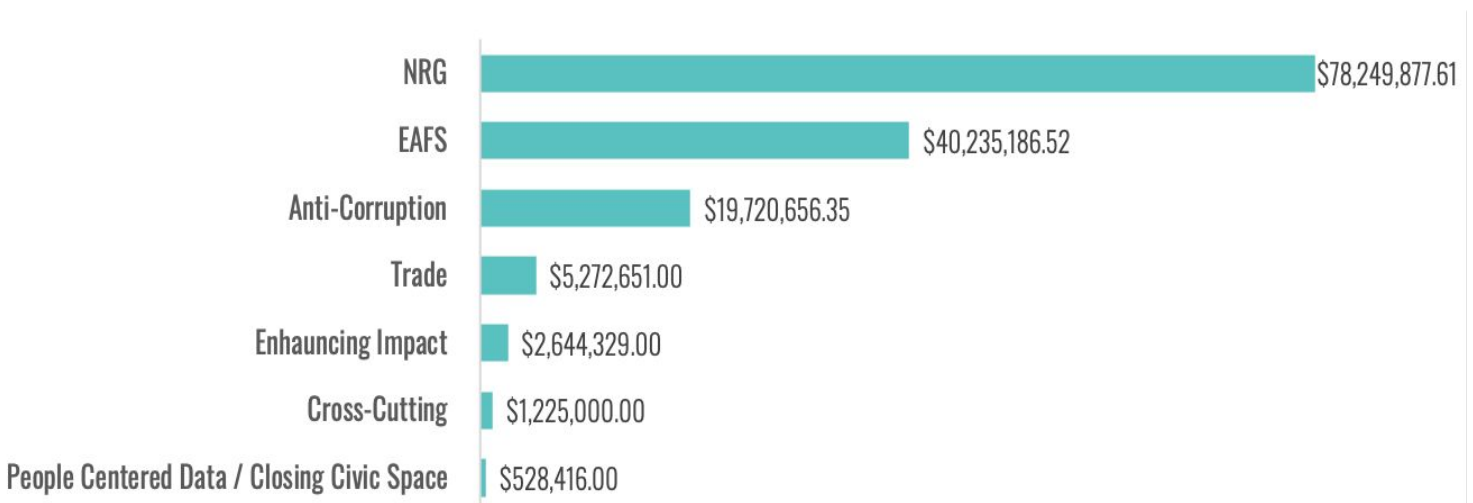
## Total FGP Grant Spending from 2013-2020<sup>1</sup>:

TOTAL GRANTED: \$147,876,116.48



This grant spending spanned across the following seven FGP portfolios: Natural Resource Governance, Equitable and Accountable Fiscal Systems, Anti-Corruption, Trade, Enhancing Impact, People Centered Data, and Closing Civic Space. As illustrated by the chart below, the majority of funding was allocated to the Natural Resource Governance (NRG) portfolio.

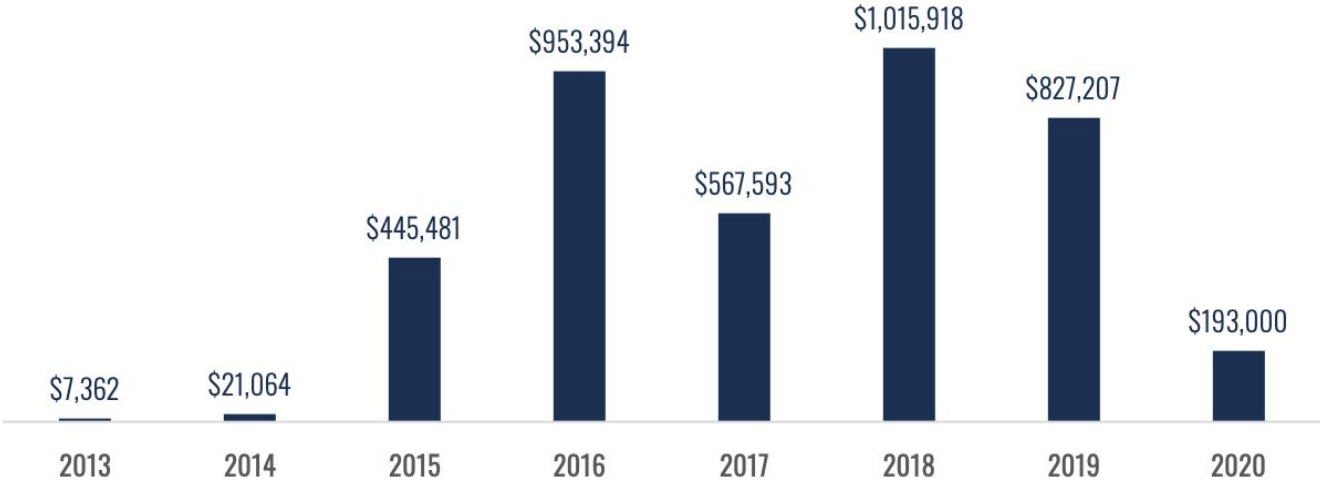
## FGP Grant Spending by Portfolio:



<sup>1</sup> Of note, the deviations in grant allocations in 2019 and 2020, as articulated in the chart above, are a result of FGP's closure and subsequent exits from some of their granting relationships.

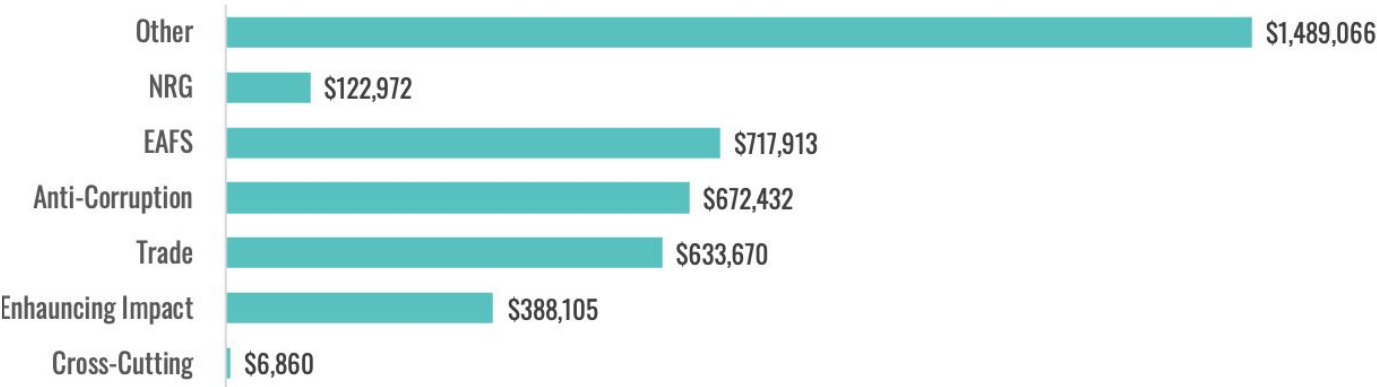
In addition to grants, FGP also funded **\$4,031,019 in contracts** for administration, technical assistance, internal operations, strategy development/design, and field building across the portfolios from 2013–2020.

**FGP Contracts by Year:**



These contracts spanned across the following five portfolios: Natural Resource Governance, Equitable and Accountable Fiscal Systems, Anti-Corruption, Trade, Enhancing Impact. As illustrated in the chart below, many of these contracts were split between two portfolios, thus were categorized as “other.”

**FGP Administration Contracts by Portfolio:**



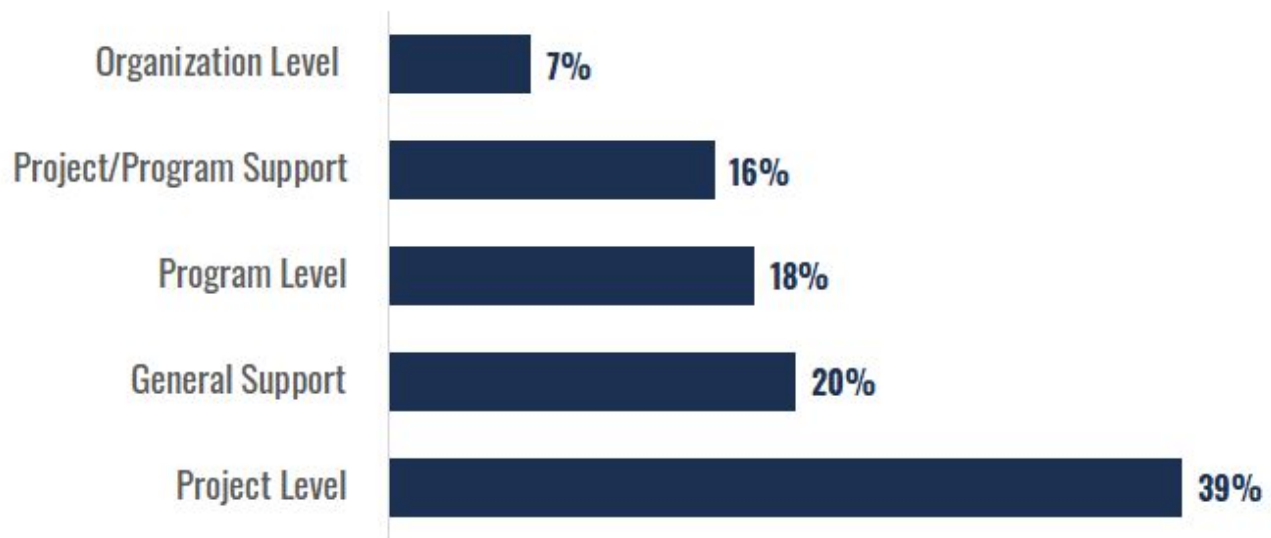


More specifically, FGP grants were provided via three major categories:

- **Core/General Support:** funding broadly granted to an organization, without stipulation for how it must be used.
- **Program-level support:** funding earmarked for specific programs within an organization.
- **Project-support:** funding granted with the intention that the funds will be used for a specific project, such as a research study.

Each of these types of financial grant support was allocated during FGP's tenure. As demonstrated by the chart below, Project level support was most commonly allocated.

### Prevalence of FGP Grant Categories (n=176 grants):



Unique to FGP was the allocation of C4 financial support that grantees could use for lobbying, organizing, or research. This was another important financial tool drawn upon by FGP. Over the course of FGP's tenure, **\$1,047,593 of C4 funding was granted**. This accounts for 7% of all grant funding allocated by FGP.

Grantees remarked on the importance and rarity of this type of financial support.

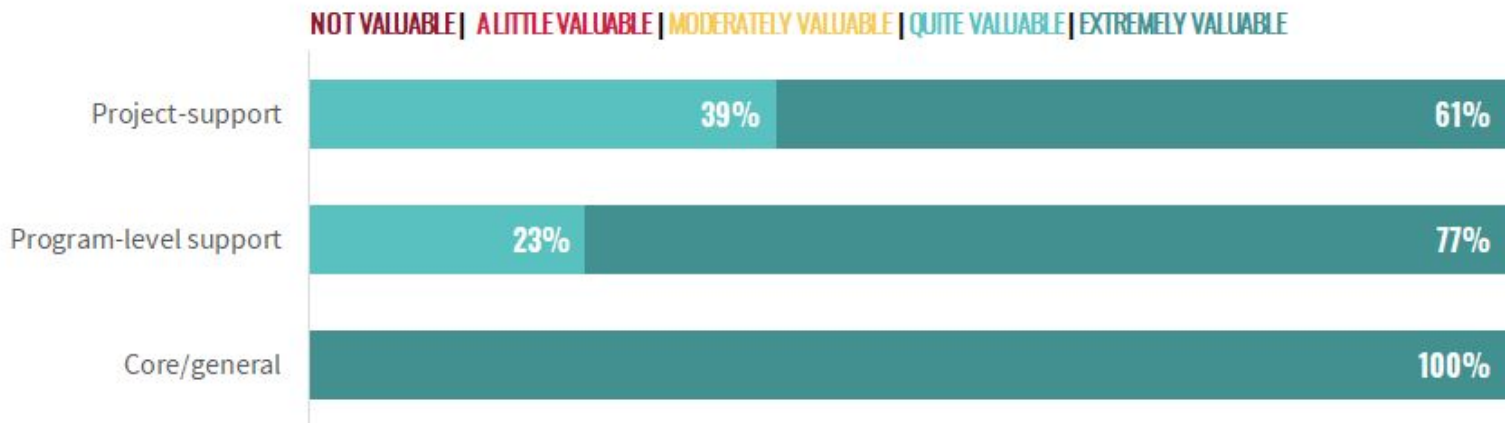


Basically 80% of our beneficial ownership work since the end of 2016 has been legislative, which meant lobbying. It's either grassroots or direct lobbying, it's convincing a constituency to endorse the bill or convincing the member of Congress to vote for the bill. And OSPC, Open Society Policy Center, was **the only C4 funder we had** until January 1st of this year."

-Grantee

Unsurprisingly, all grantee partners surveyed rated each type of financial support as “quite” or “extremely” valuable. However, core/general support was rated most favorably.

**On average, grantee partners rated core/general support as most valuable:**



Grantees had varied perceptions on the value of core/general vs program/project support. On one hand, project support was more effective in helping grantees achieve *specific*, targeted goals. However, core support was necessary to sustain operations and adapt strategies.

Perceptions of Core Funding	Perceptions of Program/Project Funding
<p>“Core funding enables us to pursue long-term global reform efforts and to undertake timely, relevant interventions in dynamic country circumstances – both of which are essential on complex issues like beneficial ownership.”</p> <p>–Grantee</p>	<p>“Having dedicated funding to engage on the issue allowed us to increase the number of staff engaged on it, and importantly, it helped to increase the buy-in and attention of senior management within the organization to the issue.”</p> <p>–Grantee</p>



I would say general support and core support seem to be *more effective*. I don't think small grants that were very restricted and required a lot of loopholes were helpful to the grantees in any way, and also weren't really helpful to us.”

–EJP Team Member

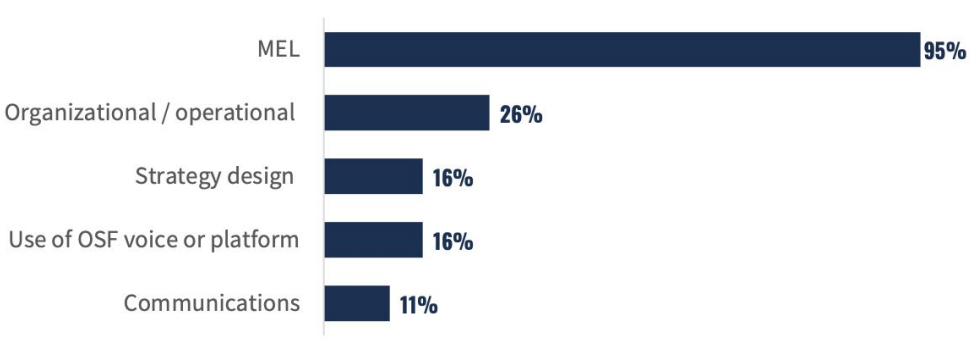
Ultimately, financial support that was flexible was deemed as the most valuable. Full discussion of flexible funding and the trade-offs involved with offering this kind of support is offered in subsequent sections.

# TECHNICAL SUPPORT

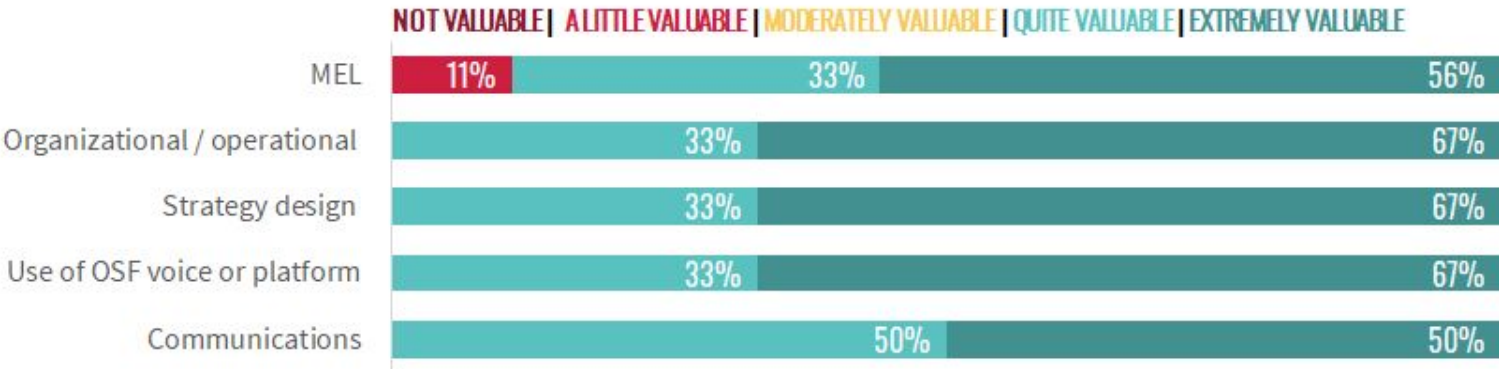
Technical support was another key pillar of FGP’s grantmaking strategy. Technical support took many shapes, including strategy design consultation, monitoring, evaluation, and learning (MEL) advice and training (via MEL Jamboree, learning exchanges, or one-on-one engagements), communications/social media consultation or advice, use of OSF voice or platform to communicate about your issues, organizational and operational advising (e.g., board, partnership, fundraising, recruitment), as well as contract management.

Of these supports, **MEL advice and training was the most commonly received technical support**. Additionally, about one in four grantee partners received consultations and advice related to their organizational health or internal operations.

## Grantees surveyed reported receiving the following types of technical assistance:



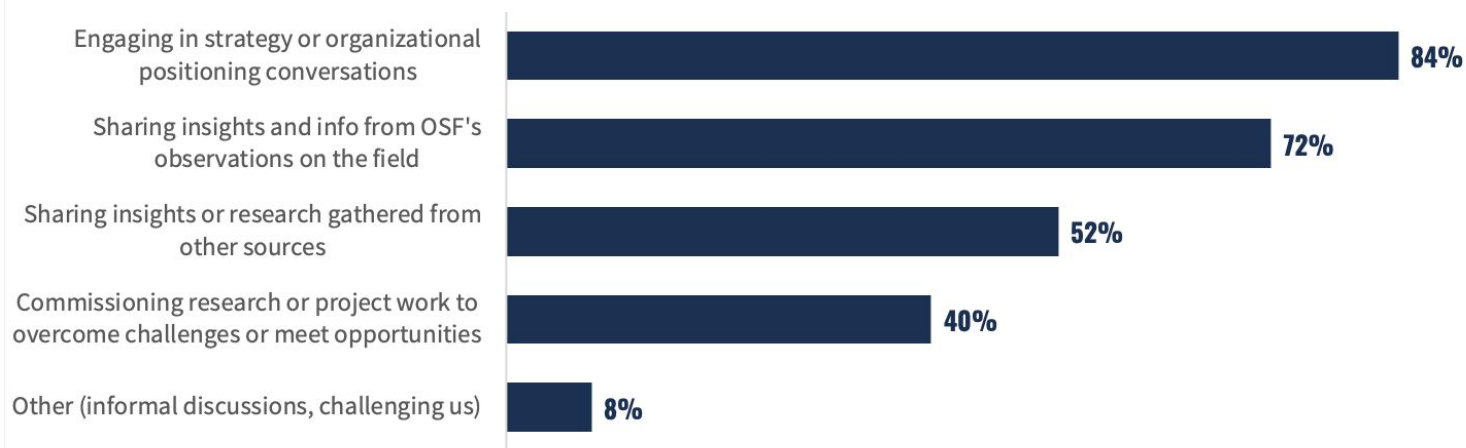
The majority of survey respondents felt the different types of technical support were **“quite”** or **“extremely” valuable** – especially technical assistance related to organizational /operational support, strategy design, or use of OSF’s voice or platform.



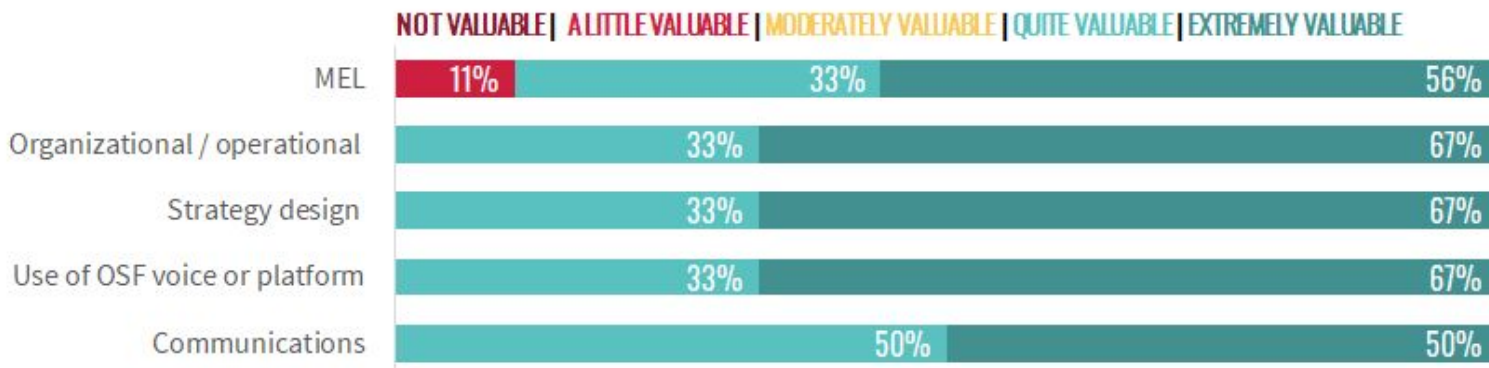
# THOUGHT PARTNERSHIP

Thought partnership was another support that FGP’s provided. This included services to grantees such as: sharing research, sharing expert opinions, commissioning of research or project work to overcome field challenges or meet new opportunities, and engaging in strategy conversations.

Grantees commonly received thought partnership support by **engaging in strategy or organizational positioning dialogues**.



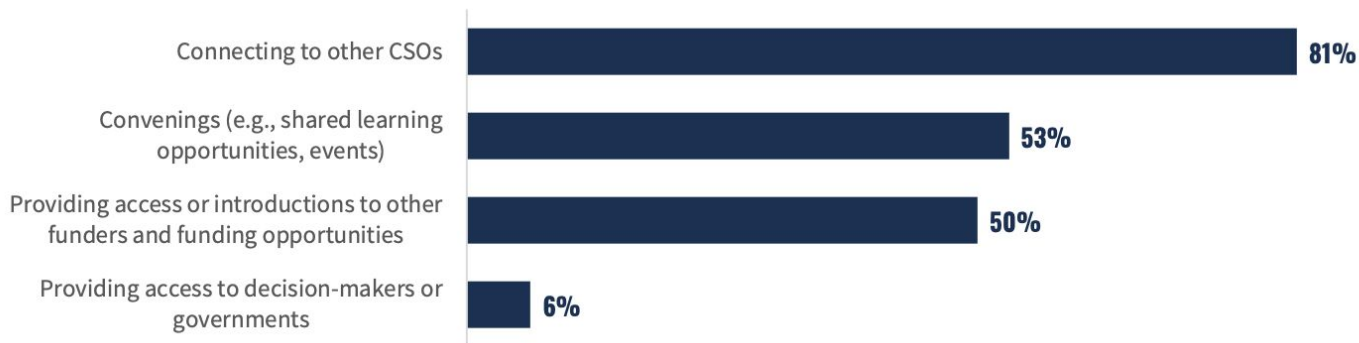
The majority of survey respondents felt the different types of thought partnership were **“quite”** or **“extremely” valuable** – especially commissioning research or project work.



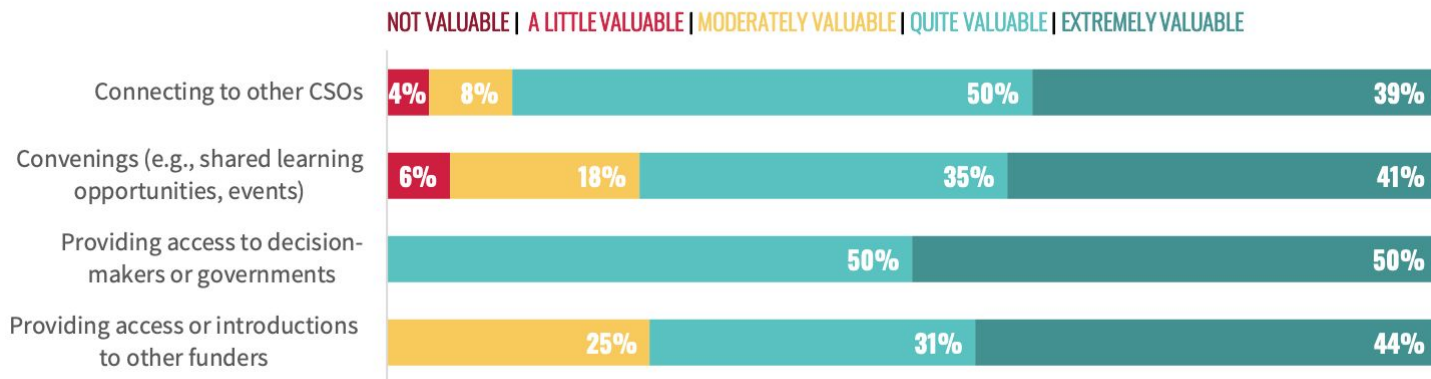
# NETWORKING SUPPORT

Networking support constitutes the final primary type of service that was offered to FGP grantees. Networking support primarily consisted of OSF hosting convenings, forging connections between civil society organizations, providing access to decision-makers, and making introductions to other funders. Of these networking support practices, the **most frequently received support was connecting grantees to other civil society organizations.**

**Grantees surveyed reported receiving the following types of networking support:**



The majority of survey respondents felt the different types of technical support were **“quite”** or **“extremely” valuable** – especially providing access to decision-makers or governments.



Of note, the interplay between grantees’ reported frequency of receiving the various types of support and their level of satisfaction with the support harbors some interesting implications. In the case of “providing access to decision-makers or governments”, only 6% of grantees received that support; however, the reaction of those 6% was fairly mixed. Future efforts may consider **formalizing what this type of support consists of and strategizing ways to provide it in hopes of making it a more consistent experience for grantees.**

# FGP STRATEGIC GRANTMAKING OUTCOMES: PROMOTING ORGANIZATIONAL HEALTH + RESILIENCE

## KEY FINDINGS

- Six outcomes related to grantee organizational health emerged from the data and were each associated with specific types of FGP grantmaking support and practices.
  - Grantees demonstrated increases in stability related staffing & infrastructure that were made possible by flexible funding that was administered in a relational and responsive fashion.
  - Grantees reported increased capacity for adaptation & innovation that was facilitated via FGP's flexible financial support, bold approach to funding innovation, and flexible grant reporting requirements.
  - Grantees indicate an increase in their capacity for Monitoring, Evaluation, and Learning (MEL) that was brokered through strong technical assistance and collaboration through partnership.
  - Grantees diversified their funding stream through FGP's communication technical assistance, and networking support, as well as thought partnership in the form of FGP board membership.
  - Grantees harbor a commitment to collaboration as a result of FGP's ongoing convenings and networking support.
- Through it all, FGP's flexible support, relationship-building, and responsive approach were vital mechanisms for improved grantee organizational health.

# FGP GRANTEE ORG HEALTH STRATEGY

A central goal of FGP was to improve the capacity and health of grantee organizations to better equip them to respond to civic space threats. The FGP Team conceptualized “improved” organizational health as spanning an array of aspects, including organizational management, governance, peer relationships, fundraising, resilience, responsiveness, learning, and sustainability.

For example, FGP asserted that healthy grantee organizations:

- Possess cohesive, independent, well-functioning boards that provide strategic leadership and able to respond effectively in a crisis
- Have a diverse and sustainable funding strategy
- Harbor strong deep bench of executive leaders, who are focused on long term organizational health, not just strategic impact
- Leverage strong systems and policies that support and enable staff to pursue the mission of the organization rather than constrain them, are responsive to context and risks, and are subject to adaptation and learning
- Be learning-centered, with reasonable (and appropriately tailored) monitoring, learning, and evaluation (MEL)
- Pay attention to diversity, inclusion and well-being of staff and leadership
- Possess transition plans for key staff positions in place
- Have prudent financial reserves present
- Work well with other organizations/collaborative
- Develop strategies that are sufficiently ambitious, are self-aware of strengths and weaknesses, and plan to address these explicitly

**The FGP team intentionally crafted a grantmaking strategy to promote this vision of grantee organizational health. This strategy leveraged the following specific techniques:**

**Financial Support:** A focus on programmatic and strategy funding instead of project funding. This funding was designed to be flexible (i.e., grants that allow organizations maximum discretion to budget according to needs and priorities), adaptable, and multi-year. Further, there was the occasional additional project grant to bolster a general support grant as well as the Organizational Health Fund.

**Technical Support:** An array of supports, including: formal and direct advising of grantee organization, financing in-kind consultants on a particular organizational issue (e.g., fundraising, MEL, communications), or grant proposal development assistance.

**Thought Partnership Support:** This spanned: FGP team members sitting on boards, offering strategic advice on all manner of issues in that capacity, creating recommendations (for fundraising, board health, leadership development, financial oversight), site visits to learn more about grantees and offer advice and suggestions in the form of questions to leadership, and prompting organizational and board leaders to take on new issues, growing stronger or bolder in particular areas of work.

**Networking Support:** Primarily manifested as connecting grantees to one-another or other experts in the field on particular topics, providing, networking and convening capacity, and showcasing grantees' work before funders.

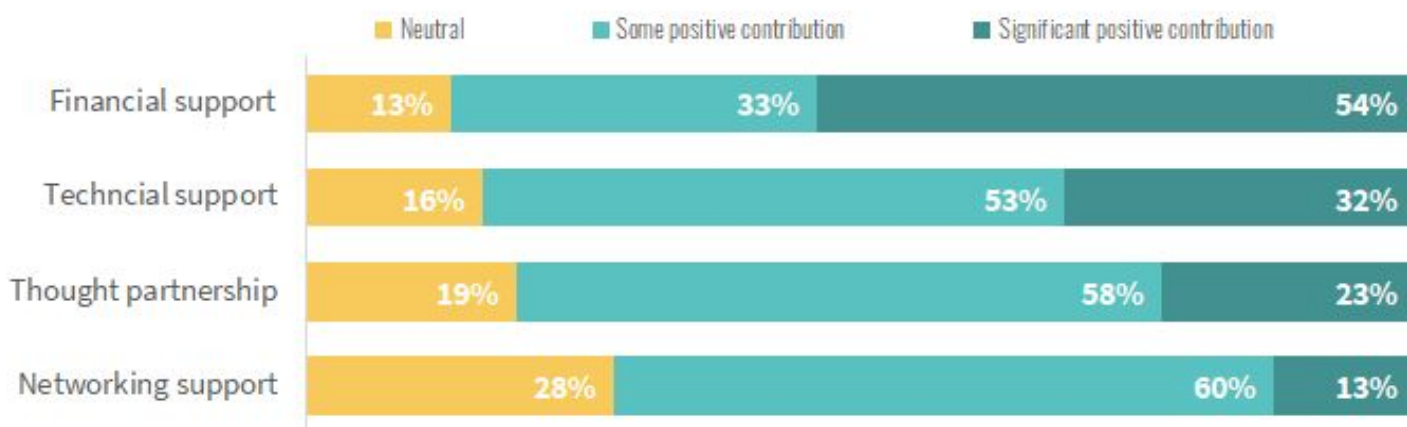
Additionally, in 2019, FGP started the **Organizational Health Fund (OHF)**, which offered a special subset of financial support to a limited group of 14 grantees, 11 of which were FGP grantees. This fund was designed to provide additional, demand-driven support to existing FGP grantees with specific, short-term capacity gaps, organizational challenges, or unexpected needs. Funds could be used to strengthen and support a wide range of approved internal systems and processes.



# IMPROVEMENTS IN GRANTEE ORG HEALTH

Survey data provide evidence of improvements in grantee organizational health and insights related to what dimensions of the FGP grantmaking strategy contributed to each of these cited improvements. Across the board, grantees reported that each of the four types of FGP grantmaking support were valuable for their organizational health.

**Of grantees who received the following types of support, the majority believe they had a **significant** or at least **some positive contribution** to their internal operations and health.**



Similarly, grantee survey data illustrate that all types of support, especially technical support, were rated as having a positive contribution to grantee organization's overall resilience.

While encouraging, these data, especially the high ratings for financial support, do not present any surprises. After all, we would expect grantees to report that financial support is indeed highly valuable for bolstering their organization's health. As such, the remainder of this section not only explores *what* the organizational health outcomes were and what types of support were deemed to be most associated with their proliferation, but also *how* the FGP grantmaking support was deployed.

# IMPROVEMENTS IN GRANTEE ORG HEALTH: STABLE GRANTEE STAFFING + INFRASTRUCTURE

Grantees reported improvements to their organizational infrastructure as a result of the grantmaking support received from FGP. Namely, grantees shared FGP support enabled them to maintain the necessary infrastructure to ensure their organization's health.



[OSF] supported our policy development. All the policies that we have, so far we have 22 policies, 18 policies were developed. So without those policies, the health of the organization would not be at the level it is...If your structures are not good, you cannot create influence. OSF sees that you must support the organization to be stable and if you want to have a bigger impact. It is more than financing. The support that comes from OSF is big; the impact is double or triple."

-Grantee

Grantees frequently mentioned that financial support enabled them to maintain the **proper staffing**. For instance, one grantee partner described how a specific project grant was essential for covering the salary of their Learning Director, who transformed the organization's approach to strategic learning in a way that directly improved their programs.



"Very valuable. The first grant that this group gave to us covered, I think 60% or 70% of the salary for a new staff member that we wanted to bring in. We managed to raise the other 30%, and this was for a Learning Director, which we never have... And so now she's been on board for, I think almost three years, and that's been really transformative for us as an organization in terms of learning, but also programs as well, and she's been helping integrate a lot of the learning that we have generated back into programs to improve what we do."

-Grantee

Other grantees noted that core support was more helpful than project grants due to the flexibility it offered them to improve their internal systems and pursue the mission of the organization rather than feel constrained by project requirements.



And we have managed to have teams where people stay for a long time and engage, and there is a high motivation and so forth. The flexible funding and committed funders is a key part of making people feel that they can relax and do their job.”

-Grantee



[our grant] has become more flexible over time, this grant is essentially core support for everything we do, which is honestly worth two or three times the dollar amount just because it allows us to fill gaps and support staff members in ways that other grants don't necessarily allow us to do that are a bit more restricted.”

-Grantee

Furthermore, financial flexible support was deemed to be effective because of *how FGP team members administered these resources*. Grantees and EJP team members alike indicate the importance of the relational nature of FGP's engagement with grantees and response to grantees' financial organizational health needs.

Grantee Quote	EJP Team Quote
“The OSF team has always inquired about our organisational financial health and have provided valuable support in response to that feedback.”	“I think we did a good job of creating relationships with our grantees where they felt comfortable asking for flexible funds or being transparent about difficulties that they're having in their organization and we could give them funds to help them address that, particularly with the organizational health fund.”

**While financial support is no doubt viewed by grantees as an effective grantmaking strategy to promote their organizational health, the effect was amplified via FGP's flexible and relational approach.**

# IMPROVEMENTS IN GRANTEE ORG HEALTH:

## IMPROVED STRATEGY + SUSTAINABILITY

Grantees also reported that their organizational strategy improved as a result of FGP's thought partnership. For example, one grantee partner described how FGP team members traveled to Washington, DC to workshop their theory of change and were also a continuous sounding board over the years.



They helped us develop our current theory of action, as we call it, our theory of change. We went down to DC and spent half a day with us, really brainstorming around that, thinking through how it would fit together in terms of on the ground, meaningful learning, support... they've provided a lot of feedback and ideas and guidance over the years, so that has all been very useful.

-Grantee

Several grantees also shared specific examples of how FGP's thought partnership enabled their organization's strategy to be more sustainability-oriented. Thus, FGP's partnership with grantee organizations helped grantees grapple with long-term visions for their work.



It was terribly valuable. In our case, it really allowed us to structure an entire program to give long-term sustainability, to evolve, to even transforming in some cases the way we are doing campaigns, building more internal expertise for doing investigation, and all of that. So, yeah, it's terribly valuable. Without OSF support a good chunk of our kind of work plan would be different.... definitely, they made us evolve along the line we wanted."

-Grantee

Across these examples, a recurring theme is the importance of on-going thought partnership to develop ambitious yet sustainable strategies, which is a critical facet of FGP's conceptualization of organizational health. Grantee commentary suggests that to effectively work towards long-term, complex outcomes, **funder commitment to ongoing thought partnership is an essential mechanism in supporting grantees to stay focused on the long-game while also being dynamic.**

# IMPROVEMENTS IN GRANTEE ORG HEALTH:

## INCREASED CAPACITY FOR INNOVATION

Grantees shared that as a result of FGP support they felt more prepared to pivot with major events or changes in the field.



OSF financial support is more flexible than support of big donors; such flexibility allows to better react to changes of the political/social environment, which is very often a case in young democratic countries.”

-Grantee

**FGP’s intentionally flexible financial support was deemed to be the most effective grantmaking strategy to support adaptability.** For instance, one grantee shared how the core funding they received from FGP created flexible conditions for them to seize new opportunities as they arose, without the added burden of seeking approval from the program office.



Core/unrestricted funding has been instrumental in allowing the movement to respond to unforeseen challenges and grab opportunities as they arose as we didn’t have to go back to our grant officer for approval.”

-Grantee

Similarly, grantees reported that FGP’s willingness to invest in bold and new approaches contributed to the ability of their organization to innovate in pursuit of their goals.



I think it has played a very significant role. OSF is one of the very few funders that one could think of – that is willing to invest in innovation. OSF is open to invest in something that is new...that can somehow change the game. And that’s been great because it allowed us as an organization to open new means of advocacy in our work...always with data; always with strong argument. It’s always been important to have OSF support to look at new ideas and support innovation. Has been a great advantage to this support for many years.”

-Grantee

# IMPROVEMENTS IN GRANTEE ORG HEALTH:

## INCREASED CAPACITY MEL

Data indicate FGP technical support encouraged grantees to be learning-centered, and **increased their capacity for MEL**. Within FGP’s overarching grantmaking strategy, grantee MEL capacity and practice is linked with improved organizational health, which of course is in service of grantees achieving their outcomes.

Grantees, external actors, and EJP Team members alike perceived that the technical assistance offered by FGP related to MEL capacity building and practice changed their organization’s level of evaluative thinking when it comes to social change and thus increased their organizational capacity to engage in MEL.

Theme	Grantee Quote	EJP Team Quote	External Actor Quote
<b>Evaluative Thinking</b>	“It allows us to <b>really think about internal management...and think about what you are actually spending the money on</b> and how effective it would be.”	“I wonder if they might have seen it as a bit of box-ticking, but <b>I think in the practice of doing it, they were forced to think about their outcomes and their indicators and the data sources</b> , the three things that we required. In forcing them to think about that, I think that even if they were forced against their will, they were sort of thinking about things in different ways, which may have had benefits.”	“Because the grantees are so invested in the key things they are working on, sometimes you don’t take a break to think about the bigger picture... <b>I think that OSF came in with the idea of having grantees meet in one place and allowing them to learn and think about what they’re doing to course correct.</b> ”
<b>Increased Organizational Capacity for MEL</b>	“That’s a big piece of what they’ve worked on with us and has been really, really useful. I think generally it is an <b>important skill</b> that NGOs and other grantees want to build...”	“I think our MEL requirements and technical assistance influenced our grantees --both <b>in encouraging MEL experimentation</b> among willing grantees and encouraging reflection among less eager grantees.”	“When I look at donors that I work with in partnership, <b>OSF is one of the strongest</b> in terms of providing, again, financial and strategic support and advocacy for their grantees to do more of monitoring, evaluation, learning.”

# IMPROVEMENTS IN GRANTEE ORG HEALTH:

## DIVERSIFIED FUNDING STREAMS

Grantees highlight that FGP technical assistance, paired with networking support **enabled their organization to amplify their visibility**, which resulted in an ability to diversify their funding sources. For instance, one grantee shared that FGP team members provided them with valuable technical assistance related to their communications that enabled them to reposition aspects of their work in a variety of ways. This communication-oriented technical support, paired with FGP's vast network, provided the grantee organization with the proper messaging and platform to amplify their work to new audiences.



In terms of communications, [Program Officer name redacted], in a number of different ways, has connected us to OSF colleagues and helped to promote our work or to position it in different bits and pieces. They have a great platform and a good audience for this kind of thing."

-Grantee

A different grantee shared that FGP provided them with valuable thought partnership, in the form of board participation, that when paired with FGP networking support, boosted their **credibility as an organization**. Again, this had implications on the diversity of the organization's funding streams.



Having [Program Officer name redacted] on the board meant we were able to benefit institutionally from their influence and capacity; and, as a newly established entity, that board role also sent an important external signal about our credibility."

-Grantee

FGP's deliberate efforts to **convene grantees and donors together** in the same spaces were a specific facet of the networking support provided to grantees. Grantees shared examples of how attending convenings bolstered their visibility and helped them arrange strategic meetings with influential individuals (e.g., donors, government officials).

Although not directly attributional to the technical assistance, thought partnership, and networking support provided by FGP, grantee survey data highlight that FGP grantees did indeed leverage multiple funding streams. **Of the 47 FGP grantee partner organizations that responded to the survey, 20 reported receiving funding from other donors**. The most common funders were the Ford Foundation (9), Luminare (6), the William & Flora Hewlett Foundation (6), and the European Union (5). This finding is indicative of grantee's possessing diverse and sustainable funding strategies.

# FGP STRATEGIC GRANTMAKING OUTCOMES: ADVANCING THE FIELD

## KEY FINDINGS

- Five outcomes related to field advancement and health emerged from the data and were each associated with specific types of FGP grantmaking support and practices.
  - Data reveal a perception of increased field dynamism as a result of FGP's international financial support that was rooted in activism and boldness.
  - FGP's systemic funding strategy and collaborative thought partnership practices resulted in increased strategy alignment across the field.
  - FGP's hallmark networking support in the form of convenings was deemed to promote collaboration across the field.
  - FGP's networking also contributed to an expanded participation of various types of actors in the field, both at the civil society and donor levels.
  - Data indicate that FGP's technical assistance and thought partnership practices promoted the exchange of ideas and best practices, thereby cultivating field-wide Monitoring, Evaluation, and Learning (MEL) practices.



# FGP FIELD ADVANCEMENT STRATEGY

**Another central goal of FGP was to improve the resilience and health of the fiscal governance field at large** as a mechanism to promote the attainment of overall objectives related to transparency, accountability, and mitigating inequality in the fiscal governance realm. FGP's field-building approach took into consideration the entire grantmaking strategy at the portfolio level, looking at the whole field and context of current grants, rather than just focusing on discrete grantees. In this way, this field advancement goal builds upon and reinforces the grantee organization health objective previously discussed.

From FGP's perspective, indicators of a resilient and healthy fiscal governance field included:

- Achievement of fiscal governance goals (i.e., impact)
- Increased number and diversity of field players
- Increased field actor collaboration and coordination, in service of attaining aligned goals
- High levels of actor expertise and capacity
- An increase in multi/cross thematic actors & collaborations
- The existence of a mix of grassroots actors and regional/global actors connected by national actors

The FGP team deliberately crafted a grantmaking strategy to promote this vision of field building to advance field health. This strategy leveraged the following **specific techniques**:

**Financial Support:** A focus on funding organizations with a mandate to convene, connect, and pursue collective research. Additionally, an imperative to fund grantees with a mandate of technical assistance to other actors.

**Thought Partnership Support:** An emphasis on cultivating monitoring, evaluation, and learning (MEL) tools and practices for field-wide use.

**Technical Support:** A commitment to commissioning research on field-relevant topics.

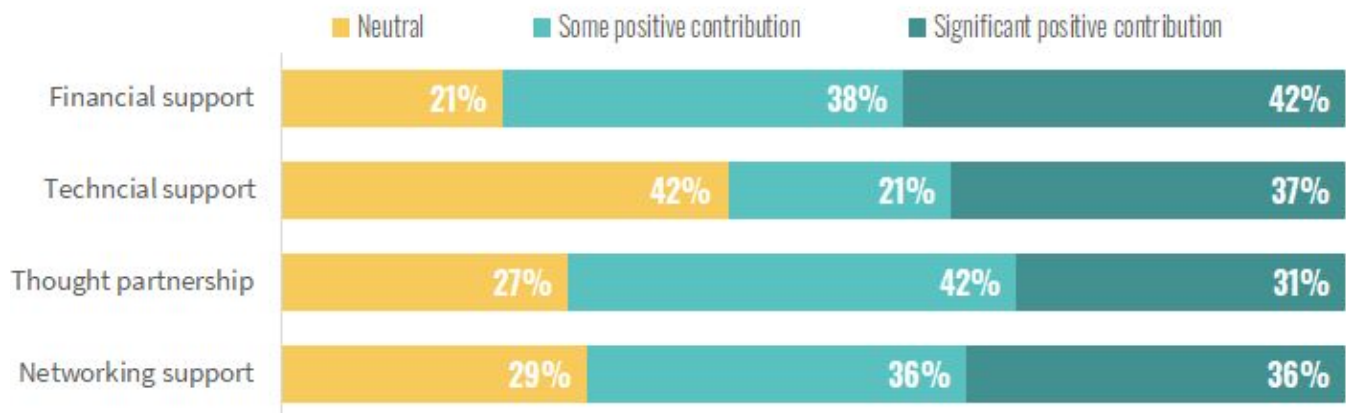
**Networking Support:** Primarily manifested as working with other donors to align on funding principles and practices, connecting grantees to one-another or other experts in the field on particular topics, and showcasing issues before funders, other influencers.

# ADVANCEMENTS IN FIELD HEALTH

Data collected from grantees, EJP Team members, and external actors reveal an array of field-wide advancements that are perceived to have (at least partially) resulted from specific FGP grantmaking practices.

Grantee survey data indicated that all four categories of FGP grantmaking support were important for advancing the field of fiscal governance.

**Of grantees who received the following types of support, the majority believe they had a **significant** or at least **some positive contribution** to advancing the field.**



As noted in regard to organizational health, these ratings, especially the high ratings for financial support, are not surprising. Thus, the discussion of field advancements and corresponding FGP grantmaking support describes field-health related outcomes and unpacks *what types* of support they were most associated with, as well as *how* the support was administered.

# ADVANCEMENTS IN FIELD HEALTH:

## INCREASED FIELD DYNAMISM

Grantees and external actor interviewees highlighted that FGP's financial support strategy helped the field evolve dynamically. For instance, the grantee quote below asserts that the flexible funding they were allocated from FGP enabled them to pursue new and developing areas of work, ultimately resulting in changes to the fiscal governance field.



Funding from OSF enabled [us] to achieve a number of critical changes in the field of fiscal governance. First and foremost, OSF support provided long-term, flexible resources to build out the field by testing new methods, developing new areas of work, and engaging new actors in order to generate evidence and learnings for stakeholders."

-Grantee

FGP wielded their financial support uniquely in their willingness to fund new, bold ideas. Grantees explained that FGP's bold strategy led to risks in the field that brought about lasting change.



OSF are less risk-averse than almost any other donor, they will take bold actions where almost every other single donor will go in small. It was a game-changer, I think, in our field, and they were the first, and they were the biggest to say, 'Yep, we're gonna do this and we're gonna bring other donors in, so you can do this.'"

-Grantee

Related to risk taking, one external actor shared their perceptions of FGP's role as an activist funder. This attribute constitutes another essential mechanism in understanding how FGP's financial support promoted dynamism within the field. FGP was willing to think and act politically, provide C4 funding, make bold decisions, and share their learning to push the evolution of the field.



OSF's reputation was more of an activist. For an activist organization to be keen about learning had significance. Importantly, they also made resources available for real learning."

-External Actor

# ADVANCEMENTS IN FIELD HEALTH:

## INCREASED FIELD-WIDE STRATEGY ALIGNMENT

FGP's grantmaking strategy leveraged a funding approach that deprioritized any single organization and rather emphasized the interconnected work of the collective. This overarching grantmaking strategy was recognized by grantees as an effective strategy for aligning and advancing the field over the long-term.



They're funding a number of different groups in that space who are all working together and sometimes literally through coalitions and sometimes sort of informally, but having an ecosystem, of all groups that are all working towards something, because it's really difficult for one organization no matter how powerful they are to have really sustained impact. It takes a lot of different factors pushing from different perspectives through different means to create a drum beat that can lead to change, which oftentimes takes years, so...OSF's willingness to step in and fund a number of different organizations that are all doing the similar types of work and focusing on similar political opportunities is really important because the impact would be much less successful otherwise."

-Grantee

Grantees also indicated that they felt this approach was novel for funders. For example, one grantee praised the focus on FGP's strategy to form funding cohorts to deliver impact that was larger than the sum of the cohort's parts.



So there was much more focus on cohorts and thoughtfulness about how to create cohorts and be larger than the sum of the parts than from other funders. So that's not something that we've done a lot. So that was really a unique thing."

-Grantee

Similarly, another grantee discussed FGP's rare ability to value the systemic nature of fiscal governance work.



"They saw the systemic value of this kind of work, and I think that's rare for donors... I think there's a tendency for a lot of donors to be focusing on a shorter term impact...There's now a trend to look at service delivery, which is sort of a whole new ballpark. It was clear that OSF was a great partner because they understood that work like this is quite technical, it's going to take some time."

-Grantee

A key feature of the FGP grantmaking strategy was their practice of engaging other members of the field, such as grantees and external actors in creating and advancing strategy goals and designing a portfolio to pursue those goals. Accordingly, grantees highlighted that FGP **connected grantee's individual strategies with the wider strategy of the field**. Grantees appreciated the direction from FGP and saw them as partners who were invested in the work.



Definitely we felt we were a part of a wider strategy in terms of what they were trying to do, and I think probably vice versa, they felt they were embracing our wider strategy in terms of setting precedents through our approach.”

-Grantee

Grantees came to rely on this meaningful thought partnership and their bidirectional relationship with FGP, where grantees and FGP staff **worked together to align strategies** to advance the field. However, including grantees in this effort meant that they were invested in the wider field strategy and frustrated when it wasn't fully implemented as expected.



The team developed an entirely new strategy for the Economic Justice Program in the last year or more, as you may know, which I think is not going to be adopted. And we spent not that much time, but certainly probably a day or two, at work, going over that strategy, providing feedback, having calls with them, talking about what should be included. It was certainly a thought partnership both ways, and we're happy to do that because as we discussed, it helps inform the field and it helps us get a sense of what they're thinking about it and so on.”

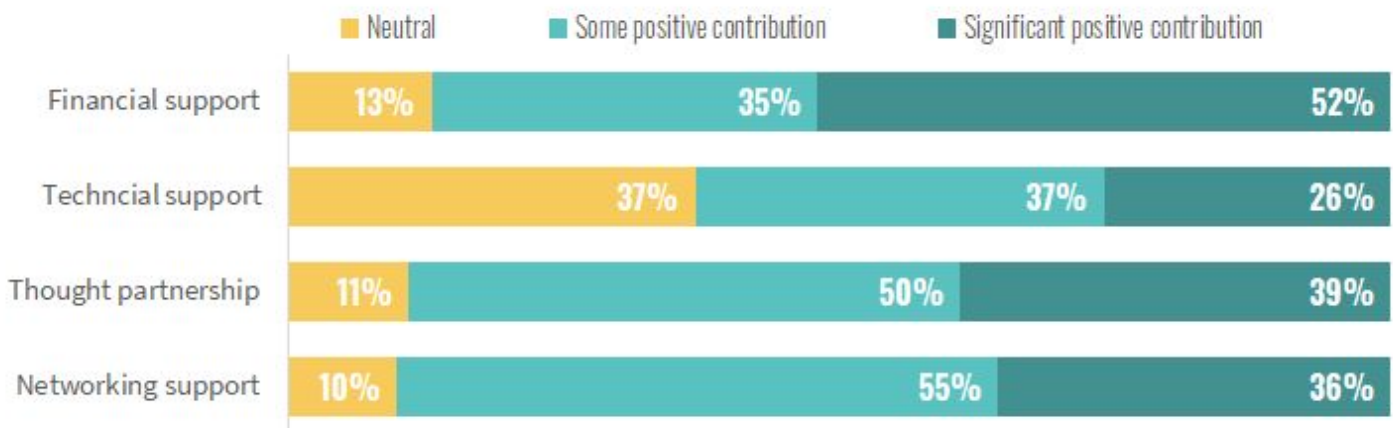
-Grantee

# ADVANCEMENTS IN FIELD HEALTH:

## INCREASED COLLABORATION

A key tenet of FGP’s grantmaking strategy was their networking support to connect various parts of the field that complement each other. Overall, the field benefitted from grantees’ ability to collaborate and work toward common goals.

The majority of grantees believe FGP’s grantmaking support had a **significant** or at least **some positive contribution** to increasing field-wide collaboration.



Grantees shared how when their organization works in concert with other civil society organizations, their impact has the potential to multiply.



It also helped with partnerships because of the flexibility and also sometimes knowing that there’s a bit of an encouragement also to work with civil society, local civil society that were very much supported as well, so you bring a lot of technical expertise and then you can channel it to local civil society, for example, which will then multiply the impact you can have. And they’ve always been very supportive of that.”

-Grantee

Further, a grantee in the trade portfolio shared that they have benefitted from the relationships FGP helped them broker and have continued to sustain these connections.



We really benefited from the relationships that formed among our sub-cohort [in the trade field], which were stronger than they would have been without the funder [FGP/OSF], but that they continue as independent relationships now, so it was kind of the ideal situation.”

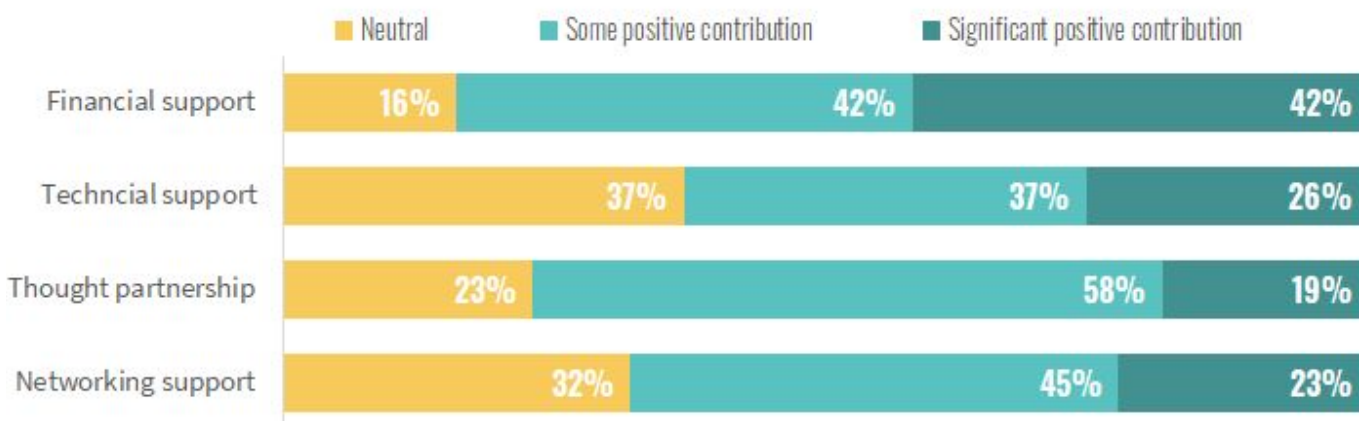
-Grantee

# ADVANCEMENTS IN FIELD HEALTH:

## EXPANDED FISCAL GOVERNANCE FIELD

Through FGP’s financial support strategy, there was an expansion in the types of actors that were invited to participate in the fiscal governance space. This expanded participation was two-fold: (1) enabling new organizations to engage in fiscal governance issues and (2) encouraging more donors to engage in the field.

The majority of grantees believe FGP’s grantmaking support had a **significant** or at least **some positive contribution** to increasing representation in the field.



First, FGP’s grantmaking strategy brought new organizations to the table who would not have been able to focus on these issues without OSF support.



I do think OSF did have some really big impact in creating the field, just simply because they helped create the finance that would stand up and sustain civil society organizations that would not exist otherwise.

-External Actor

Secondly, via their networking capabilities, FGP cultivated a dependable group of funders who were committed to the fiscal governance field and objective.



They were a very big part of developing and nurturing a group of donors that took on this work...helping to bring together a dependable group of donors working in this field. OSF was very influential in bringing donors into the field.”

-Grantee

# ADVANCEMENTS IN FIELD HEALTH:

## FIELD-WIDE MEL PRACTICES

FGP's thought partnership and technical support resulted in the advent of multiple MEL tools, events, and practices that enhanced MEL capacity, field-wide. Grantee partners noted that FGP launched the first efforts to prioritize MEL across the field and indicated that MEL served as a vital field-building mechanism.



I think generally, throughout the grants we've received from OSF, there's been an emphasis on learning and connecting with others, and that's been very useful for us. For example, they've brought us to 'MEL jamborees', which are essentially, field-building exercises."

-Grantee

Another grantee echoes this sentiment, highlighting how the FGP's MEL technical assistance and thought partnership promoted the exchange of ideas and best practices.



"It influences the field because it brings together a team of experts. The exchange of information and good practice."

-Grantee

Similarly, external actors viewed this element of FGP's grantmaking strategy as both novel and tremendously impactful, citing how it influenced how other donors thought about the value and the use of monitoring and evaluation as tools for strategic learning.



I think the support that they provide, both financial and capacity building-wise to learning and evaluation is huge and not something you see elsewhere necessarily. It helps organizations be more effective and helps them be more reflective, and I do think it has ripple effects on the field, I think it changes what other donors are doing."

-External Actor

**Further, other external actors offered praise for FGP's deliberate financial support for MEL, indicating that FGP 'set the standard' for MEL across the field, inspiring other funders to elevate their MEL quality.**



I think it's the single most impactful thing that they [FGP] did. I think that creating the financing stream for that, but also having a core person really made a difference because there was a lot of interaction in teaching and then holding workshops and showing how you do MEL; this is what 'good' MEL looks like."

-External Actor



# LOOKING BACK: EFFECTIVENESS OF GRANTMAKING PRACTICES

As evidenced in this report, flexibility, responsiveness, transparency, and equity were all guiding values that informed the strategic vision for grantmaking during FGP's tenure. As such, these values serve as useful benchmarks to frame the analysis of "grantmaking effectiveness." Overall data indicate that FGP's grantmaking strategy was effective in contributing to the attainment of numerous organizational and field health outcomes.

## KEY FINDINGS

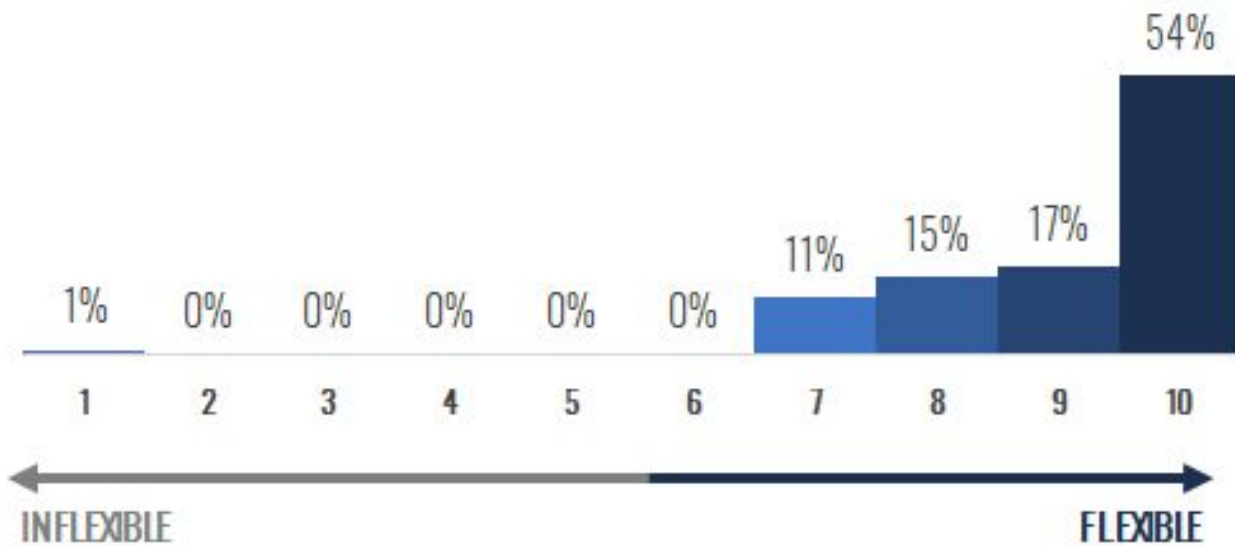
- Flexible grantmaking practices, particularly the financial support, were believed to afford grantees maximum autonomy over their work, enable them to fill gaps, and seize opportunities as they emerged.
  - Flexibility in their grantmaking extended beyond financial support. The FGP team intentionally crafted procedures and practices that grantees felt were accommodating and less burdensome.
- A relationship-oriented and responsive approach to FGP's grantmaking was evident. Both EJP Team members and grantees reported that FGP's grantmaking approach was rooted in authentic relationships and partnerships.
- Grantees shared positive feedback about the degree to which the FGP team demonstrated transparency in their relationship.
  - However, ample concerns were raised about how OSF's restructuring was communicated. Some grantees expressed disappointment regarding the decreased transparency that their organizations experienced in the face of OSF's structural change, and the uncertainty that brought.
- Grantees felt that the FGP team adequately acknowledged the inherent power dynamics in their relationship and embraced an authentic "partnership approach" to the grantmaking.
  - However, EJP Team members were a bit more critical of their relationships and their colleagues' relationships with grantees, as well as their selection of grantees.

# FGP VALUES: FROM VISION TO PRACTICE

## FLEXIBILITY

Many of the organizational and field-wide outcomes elicited from FGP were directly associated with FGP’s flexible grantmaking practices. Encouragingly, in the grantee survey, FGP grantees positively rated the flexibility of FGP’s support.

**Grantee partners rated their organization’s relationship with OSF as highly flexible.**



FGP’s flexible grantmaking practices, particularly the financial support, were believed to afford grantees autonomy over their work, enable them to fill gaps, and seize opportunities as they emerged. This flexibility was seen as an advantage that FGP funds offered in comparison to other donors’ contributions and was a cornerstone of FGP.

**3 in 4 grantees strongly agree OSF’s financial support allows them to be flexible.**

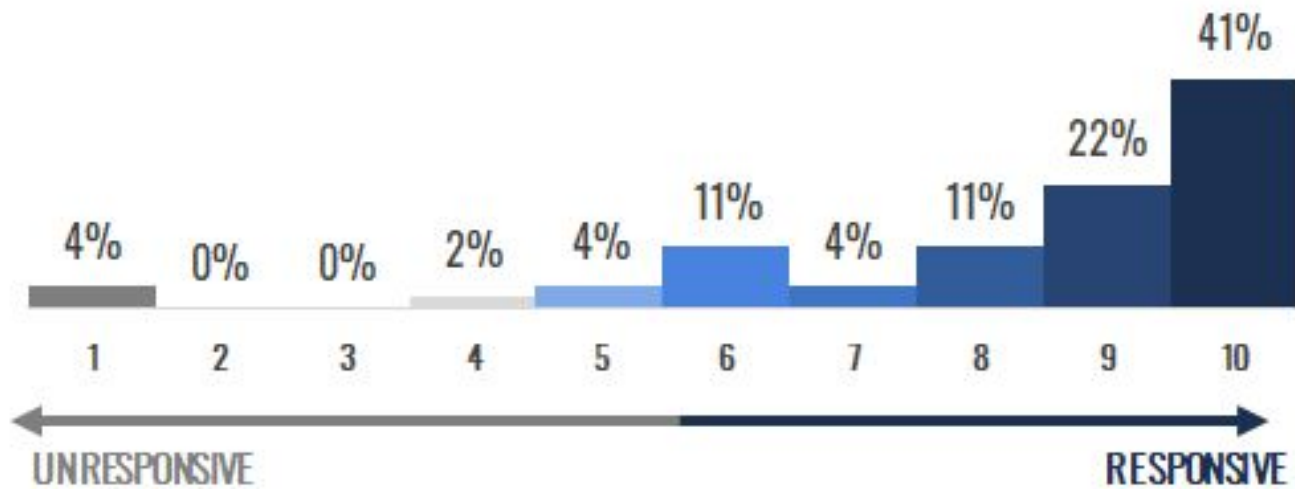


# FGP VALUES: FROM VISION TO PRACTICE

## RESPONSIVENESS + RELATIONAL

Grantee survey responses and interview commentary both indicate that OSF’s approach was highly responsive to their needs.

Grantee partners rated their organization’s relationship with OSF as **highly responsive**.



For instance, grantees praised how responsive their FGP program officer was, citing FGP’s quick correspondence, ability to listen, and delivery of transparent information. Related to responsiveness, grantees nearly all agreed or strongly agreed that OSF financial support was timely.

**2 in 3** grantees **strongly agree** OSF’s financial support is timely.



Grantee interview commentary reinforced these quantitative ratings.



Funding arrived on time and with good opportunity. There’s always admin issues that need to be solved, but overall I believe the processes are very good and with very good timing and overall it has been very positive.”

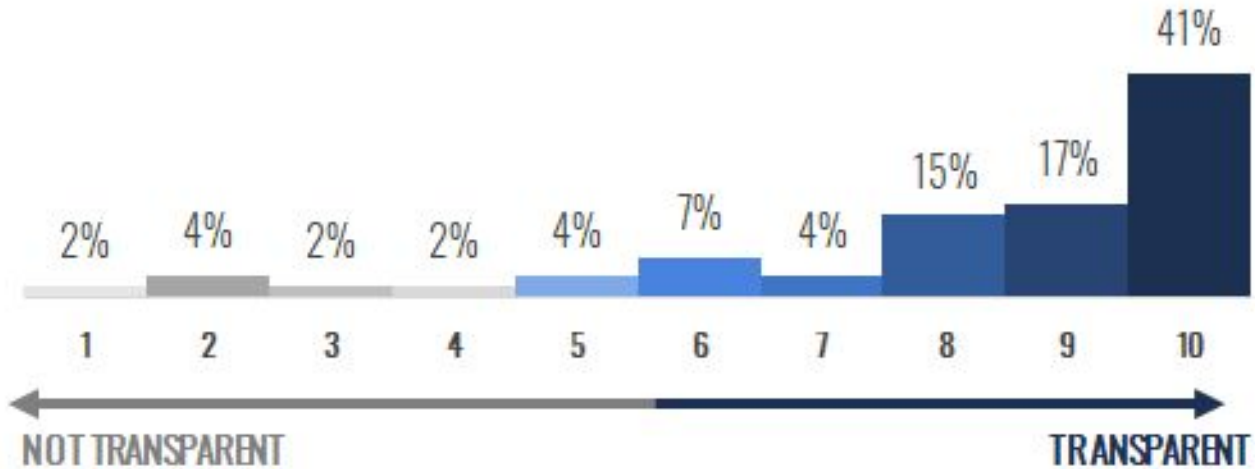
-Grantee

# FGP VALUES: FROM VISION TO PRACTICE

## TRANSPARENCY

In alignment with the core values of FGP, data indicate that FGP’s grantmaking practices demonstrated high degrees of transparency.

**Grantee partners rated their organization’s relationship with OSF as transparent.**



Grantees and EJP team members alike felt communication between them was open and honest.

Grantee Quotes	EJP Team Quote
<p>“We’ feel open and honest in our relationship with OSF, we can talk about the problems that we’ve faced and not feel like that’s going to lead to any kind of reduction in funding because I think the team understood that we’re trying to do new things and trying new things is part of what they’re funding.”</p> <p>-Grantee</p>	<p>“I also think FGP’s approach to internal openness and transparency (e.g. requiring peer feedback on grant decisions, documenting decisions, opportunities for all staff to be involved, minimized hierarchy, etc.), was a good model for other OSF units and other funders in ensuring decisions were strategic, relevant, and equitable.”</p> <p>-EJP Team member</p>
<p>“In a period of uncertainty, they communicated with us really, really excellently.”</p> <p>-Grantee</p>	

While many grantees did feel there was a high degree of transparency inherent in their engagement with OSF during the FGP lifespan, there was **ample concern raised about the manner in which OSF’s restructuring was communicated**. Some grantees expressed disappointment regarding the decreased transparency that their organizations experienced in the face of OSF’s structural changes, and the resulting uncertainty it had for their future work.



I have always really valued OSF financial support for its flexibility, its comfort with advocacy and organizing, and the openness and intellectual capacity of program officers, who behave as real partners. OSF’s moratorium and institutional unresponsiveness of the last year or so are thus extremely disheartening.”

-Grantee

Other grantees highlighted the internal and external effects that these changes, and the lack of transparent communication, were having.



The lack of information regarding the restructuring of OSF, particularly before tie-off grants were announced, puts us in a situation where we could not plan/budget effectively. We understand that there are limits to what OSF can share during its restructuring, but the uncertainty for grantees can be debilitating.”

-Grantee



The freeze in funding over the last year-plus, long delays in consideration of future funding, and little or no communication with this field of grantees about how OSF sees our work, is a real failure and risks wiping out much of the organizational health-building that the years of the FGP achieved.”

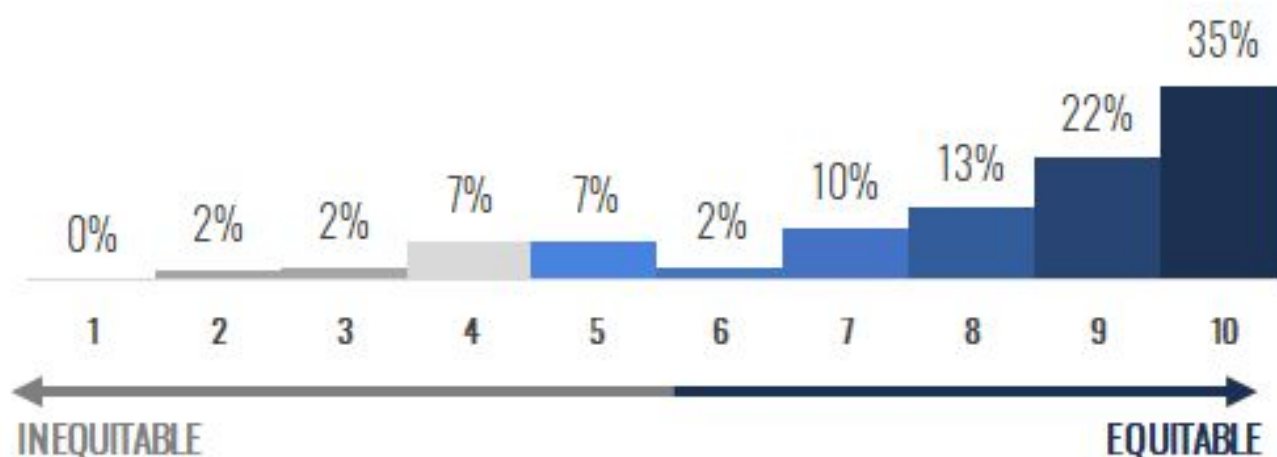
-Grantee

# FGP VALUES: FROM VISION TO PRACTICE

## EQUITY

By and large, grantees shared that their relationships with FGP felt more transformative than transactional.

**Grantee partners rated their organization's relationship with OSF as equitable.**



Moreover, many grantees expressed that FGP adequately acknowledged the inherent power dynamics in their relationship and embraced an authentic “partnership approach” to the grantmaking.



I felt that the partnership was really good, far superior to any other funder relationships I've had both in terms of the power dynamics... I couldn't really ask for more.”

-Grantee



I've had a really positive and constructive relationship with everyone I've worked with at OSF. It's one of the things I really appreciate about it. Even though there's inevitably power dynamics when you're talking to donors, especially donors that give you a lot of money. Some donors tell you, 'treat me as an equal as a peer, we're here to learn alongside you or not judge you.' Of course, when you're getting money, that's easy to say and harder to put in your practice. But with OSF, that's the closest I have come to it.”

-Grantee

However, EJP Team members were a bit more critical of their relationships and their colleagues' relationships with grantees, particularly related to equity. As one EJP Team member highlighted, the quality of partnership between program officers and grantees fluctuated.



I wish there was a little bit more humility and appreciation for the fact that we've given our grantees the money for a reason... I think it is important to differentiate between when you have high agency and when it is low, which by the way, it should usually be low agency. I just think we don't always appreciate that dynamic, and yes, there are times that a donor can spot gaps and can really benefit from having a birds-eye view, but I think we often sort of overestimate that."

-EJP Team Member

EJP Team members were also critical of the equity practices surrounding the mechanisms for identifying grantees as well as selecting which grantees are funded. EJP Team members commented that more equitable processes are needed for identifying grantees and for issuing proposals more broadly.



I think it would have been good to have a more equitable process for identifying grantees, I think that a lot of them were the same kind of groups that we're always funding, which does get difficult when you're a global program, 'cause there really are only a few working globally, it's like, 'yeah, you could find some tiny organization in rural Columbia, but that's not strategic for us.' So I think that's really difficult, but maybe seeding organizations, particularly in the Global South, that are working at a more global scale or at least multi-regional."

-Grantee

**Several EJP Team members also shared that not only are the majority of grantees located in the Global North, but many grant requirements are geared toward westernized organizations.**

# LOOKING FORWARD: LESSONS LEARNED FOR FUTURE GRANTMAKING

## **Flexible support is necessary, but not sufficient**

Grantees and EJP Team members emphasized that flexible support was essential for promoting organizational health and field health outcomes, which in turn contribute to high-level fiscal governance transformation.

However, it takes more than flexible support alone to truly support grantee organizations, advance the field, and achieve outcomes.

**To be effective, flexible support needs to be accompanied by relationship-oriented partnerships with grantees that are rooted in transparency, trust, and respect. Flexible grantmaking support is only effective when grounded in deep partnership and trust with grantees.**

## **Flexible support also requires internal funder infrastructure**

Flexible grantmaking embraces the notion that grantee's proposed outcomes and strategy will substantially evolve over time as conditions, opportunities, and politics unfold.

However, in these volatile realities, it can be challenging for program officers to obtain data, understand the full context of what a grantee is doing, and then translate it to the portfolio's larger set of priorities.

**Resources are needed for internal capacity building and transparent communication channels to cultivate trust and for program officers to gain the contextual knowledge necessary to be valuable thought partners to grantees.**



## **Multi-year, core support is vital**

Multi-year, core/general financial support was also cited as a vital attribute of effective grantmaking. Both grantees and the EJP team brought attention to the benefits of long-term funding in terms of promoting organizational health and advancing the field in the pursuit of enabling outcomes.

Grantees pointed out the challenge of sustaining outcomes, given direct attacks on progress that has been made. Some grantees outlined that 4-5 year grants would give them the flexibility and assurance needed to push for bigger wins.

The outcomes grantees are striving for in the fiscal governance field are audacious and require long time horizons to carry out thoughtful and dynamic theories of change. FGP's ability to take risks and patiently support bold visions was cited as a critical mechanism to enabling outcomes.

**OSF and other funders can continue to support grantees in making social change by supporting grantees through long-term funding.**

## **Systems thinking and shared learning is needed to advance the field**

Many FGP grantees were working towards longer-term and systemic changes, which were enabled by FGP's broader vision and system-wide funding of the field. Many grantees realized that without FGP's driving vision and funding, they would not be able to achieve their own goals towards fiscal governance.

Funder-hosted "learning summits" could provide an opportunity for grantees to share successes and troubleshoot challenges collectively. For example, during this evaluation, NRG grantees were convened for an "Outcome Harvest" workshop. While the intent of this 90-minute virtual session was to discuss outcomes related to the funding they received from FGP, grantees clearly found value in being in conversation.

**Moving forward, grantees would like more information and lessons learned shared out from OSF and other grantees. They believe having a collective, system-wide picture of the goals they are all working towards with OSF's support would help them advance the field.**

## **Diversity in grantmaking will empower local change agents**

Although grantees felt positively about their relationship with OSF, EJP Team members felt more could have been done to ‘walk the talk’ in terms of equity practices. They believe future grantmaking must be better at identifying and seeding grantees in the Global South. This is important not only from an equity-lens but also from an effective grantmaking point of view.

A large amount of fiscal governance work takes place in the Global South, thus organizations based in these regions that are managed by local actors should be seeded and funded. As is discussed in the NRG report, the role of local actors is vital for the sustainability of outcomes, especially related to maintaining political will for reform.

**In alignment with seeding and funding grantee partners in the Global South, there is a need to modify grant requirements to be more culturally responsive for global organizations, rather than just westernized organizations. This is vital for ensuring grantees and field-wide success.**

## **Transparency and communication are critical to sustainability in philanthropy**

Lastly, grantees shared that no matter how robust support is from funders, a lapse in communication has the power to undermine years’ worth of improvements and trust. For example, grantees discussed the breakdown in communication during OSF’s restructuring and the detrimental effects it had on their organization.

**As the grantee below articulates, no matter how flexible, responsive, and transparent equitable things may have been in the past – it only takes several months of lapsed communication to diminish progress.**



This program really encapsulates some of the very best things funders can do—vision, creativity, silo-busting, flexible support—and, in how it ended with no follow-on vision or support, some of the most problematic.”

-Grantee

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