

# Partner Feedback Report

Prepared for Co-Impact

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## EXECUTIVE SUMMARY

The overwhelming sense from partners about Co-Impact is one of enthusiasm, with nearly three-quarters indicating a largely positive experience and the remaining partners indicating a mix of positive and negative experiences.

- **Systems Change Idea and Vision:** Co-Impact's vision for systems change resonates with partners across rounds. They see its communication on the topic as increasingly clear. Moreover, partners particularly appreciate Co-Impact's new focus on gender. That said, partners shared mixed perceptions of how well Co-Impact's approach allows them to incorporate challenges and circumstances particular to their local contexts. They also see some opportunities to make theoretical approaches on systems change more concrete, hands-on, and practical.
- **Design Grant:** Partners view the design grant as a unique and valuable experience and as a strong benefit to their organizations. The South Africa workshop, in particular, is seen as a helpful way for partners to build relationships with each other and think deeply about their strategies. Still, partners describe the process as intense and complex; many suggest reducing the number of check-ins and theoretical exercises required throughout the process.
- **Relationships with Staff:** As in 2019, many partners praise the expertise of and thought partnership with Co-Impact staff. Survey measures indicate that funded partners' perceptions of staff's approachability and responsiveness have meaningfully improved. Opportunities remain to address some challenging partnership dynamics and to clarify with partners the priorities and expectations of donors.
- **Processes:** Co-Impact's application and reporting processes are still seen as both challenging and a helpful opportunity for partners to hone their ideas and reflect on their work. To strengthen the process and reduce the burden on their organizations, partners shared requests to provide more specific examples and guidelines for applicants and to readjust expectations for time and resources required by partners.
- **Non-Monetary Resources:** Partners note that, in addition to its funding, Co-Impact's partnership has strengthened their organizations by helping them bolster their strategic thinking and approach. Staff's expertise and advice and Co-Impact's webinars and workshops – particularly the in-person South Africa workshop – are valued resources. For further support, partners ask for more assistance finding other funding sources to support their work.

# INTRODUCTION

## BACKGROUND AND METHODOLOGY

Co-Impact has engaged the Center for Effective Philanthropy to gather feedback from its first three rounds of partners as well as declined applicants. This report is accompanied by a separate set of appendices containing the full set of partners' overall recommendations for Co-Impact, their suggestions for improvements to Co-Impact's handbook, and the data collection instruments.

### **Description of data collection**

**Interviews:** Between February and March 2021, CEP surveyed and conducted interviews with Co-Impact's partners. CEP conducted interviews with a total of 45 initiatives: 15 groups of Round 1 partners (R1), nine groups from Round 2 partners (R2), and 21 groups, including those who did and did not receive a design grant, from Round 3 partners (R3). CEP did not interview any declined applicants.

**Surveys:** CEP fielded a survey to 494 partners and declined applicants and received a total of 224 responses.<sup>1</sup> Survey results are referenced in this report and comprehensively provided in a separate online report.

### **Data analysis**

CEP reviewed Co-Impact's partners' interview and survey data at multiple levels – examining individual conversations, the prevalence of themes within each round, the experiences of partners across rounds (where applicable), and changes from the themes in the 2019 report.

In order to provide helpful contextualization of Co-Impact survey responses, CEP benchmarked those responses to similar surveys conducted for other funders. Partners' perceptions are compared to survey results of nearly 300 other funders and declined applicant perceptions are compared to survey results from declined applicants of nearly 50 other funders.

### **Notes on confidentiality**

CEP is committed to the confidentiality of the grantees and applicants who shared information for this project. We do not share individual survey responses from any partners. We have shared direct quotes only when they were representative of broader themes and do not contain any information that we believe will be identifying of a specific respondent.

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<sup>1</sup> Response rates exceeded 70% for all rounds of partners. Response rate of declined applicants was 39%. All response rates exceeded CEP's targets.

## OVERALL EXPERIENCE

At the beginning of each interview, partners were asked to sum up their overall experience with Co-Impact thus far. The overwhelming sense from partners is one of enthusiasm, with nearly three-quarters indicating a largely positive experience and the remaining partners indicating a mix of positive and negative experiences.

Within all interviews for the 45 partners groups, partners across all rounds tended to highlight the following strengths:

- The opportunity to work closely in partnership with intelligent, highly professional, and knowledgeable staff who are willing to embed themselves deeply into their organizations (n=20),
- The value of Co-Impact's thought partnership in refining their proposal, their ideas, and their organizational goals and priorities (n=14),
- The rare opportunity to pursue large-scale systems change (n=8).

Even for partners with more mixed experiences, their criticisms were underscored by optimism that nothing was "unfixable," opting to share suggestions that they believed would help Co-Impact fine-tune the way in which it works with partners. A few partners even cited their tremendously positive relationship with Co-Impact and their desire for Co-Impact to best live out its vision and values as the reasons that they were willing to provide constructive feedback.

Partners expressed gratitude for Co-Impact's continued commitment to gathering feedback and making adjustments based on their experiences. One Round 1 partner, for example, emphasized that Co-Impact "came out differently" following its last process of reflection, which is "all part of growth." This was also reflected in the survey data, where Co-Impact received significantly higher ratings than it did in 2019 across many measures, including the clarity of its communications, its transparency and approachability, and its contributions to partners' understanding of systems change.

Overall, partners' constructive feedback points in the direction of three major opportunities for Co-Impact's continued improvement:

- To develop and demonstrate a stronger understanding of the challenges and landscapes partners experience in bringing about systems change in their local, political, and organizational contexts;
- To continue to streamline and clarify certain complex aspects of its processes, including the initial concept note and application materials, interactions and exercises required in the Design Phase process, and reporting requirements;
- While celebrating its strong relationships with partners, to better manage challenging communication dynamics that persist within partnership coalitions and result from indirect communication between donors and partners.

# THEME #1

## Systems Change Idea and Vision

All partners and applicants express enthusiasm for Co-Impact's vision for large-scale systems change and acknowledge Co-Impact's unique expertise, investment, and approach.

## SYSTEMS CHANGE IDEA AND VISION

As in 2019, Co-Impact's commitment to systems change remains front of mind for partners and declined applicants. When asked what aspects of Co-Impact's distinctive approach should be maintained, over a quarter of partners mentioned Co-Impact's devotion to generating large-scale, transformative systems change. Partners often describe Co-Impact's vision and mission as bold, "very daring," and "fulfilling a missing part of the international funding system."

Survey ratings also suggest tangible effects of working within Co-Impact's focus on systems change. When asked about the contributions of their Co-Impact engagement, partners provide the strongest ratings for the extent to which working with Co-Impact and its processes has contributed to:

- *A bigger, more powerful vision for systems change that we and our organization are excited to pursue, and*
- *A deeper understanding of what it will take to successfully execute against our systems change vision, and/or new ideas for how to do so most effectively.*

Ratings for these two statements have significantly improved compared to the previous partner survey, indicating that the value of working with Co-Impact and its processes has grown since 2019.

Partners also provide strong ratings for effects that are applicable more broadly to their organizations. Specifically, partners, on average, rate above a 5 on a 1-7 scale for the extent to which working with Co-Impact and its processes contributed to:

- *Improved articulation of one or more pieces of our organization's vision and case for investment, such as our context, evidence-base and track record, vision, plan for systems change, and*
- *New and helpful insight about our current organization, work, and partnerships that have or will lead to improvements.*

Perhaps unsurprisingly, in interviews, nearly forty percent of partners – by far the largest theme related to this topic – named Co-Impact's focus on systems change and large-scale impact as the clearest aspect of its work and approach. These sentiments are further reinforced by survey data regarding the clarity of Co-Impact's communications about its goals and strategy, where ratings from funded partners are more positive than in 2019 and are now in line with the typical funder in CEP's comparative dataset.

### SELECTED INTERVIEW EXCERPTS:

*"They seem to have found their niche and they really understand it. Whether I think it's the right niche or not, I think it's really interesting that they're doing it and they focus on it well. They struck me as...having quite a clear understanding, even though it's very complex. I know they probably struggled to articulate it previously."* – **Round 3 Partner**

*"[Communications have been] increasingly consistent. Over the last number of months in terms of being able to understand jointly...'these are their priorities' ...fewer surprises or gamechangers compared to where we were a year ago."* – **Round 1 Partner**



## Valuable Focus on Gender Equality

In addition to successfully positioning itself as an expert on systems change and finding “its niche,” partners believe Co-Impact has successfully connected its focus on gender equality to its overall mission of systems change. When asked about what aspects of Co-Impact’s communications are the clearest, twelve percent of partners – the second largest proportion – mentioned Co-Impact’s new focus on gender.

Throughout interviews, several partners mentioned their appreciation for this new focus, which also led them to take action within their organizations and contexts. When asked about the additional ways Co-Impact has contributed to their work, their thinking, and/or their initiative, 20 percent of partners mentioned Co-Impact’s focus on gender, describing the focus and Co-Impact’s webinar as “really enjoyable” and helpful for “plac[ing] our work in a greater context.”

**Differences in Survey Ratings by Gender:** As in 2019, CEP collected demographic data from partners and declined applicants as part of the survey. In 2021, 52 percent of respondents identified as women, compared to 44 percent of respondents in 2019.

Across the partner survey, respondents identifying as women provided significantly lower ratings than respondents identifying as men for their perceptions of Co-Impact’s responsiveness, their comfort approaching Co-Impact if a problem were to arise, and the extent to which Co-Impact understands their contexts.

### SELECTED INTERVIEW EXCERPTS:

*“One [tangible benefit Co-Impact brought to us] was the gender piece... how to look at it in a very different way. [It] brought a complete, unique perspective to us that...opened our minds to something which we were not used to thinking.” – Round 1 Partner*

*“What they have done absolutely brilliantly, and they should be so proud of and we are so proud of them for it, is how much clarity that they have gotten on their approach to gender and the importance of gender. You can see that it’s extremely well-thought-out, that it has coherence.... It doesn’t feel like somebody’s forcing something onto you.” – Round 2 Partner*

## Prioritizing Understanding of Local Contexts in Systems Change Approach Even More

Overall, partners find Co-Impact’s vision and communications about its goal and strategy to be compelling and transparent, and they view Co-Impact staff as experts. They share how the engagement with Co-Impact inspires them and their organizations to reflect on their own place in their ecosystems. Still, partners’ suggestions for Co-Impact highlight their desire for more clarity on how they should execute against Co-Impact’s vision of systems change and for Co-Impact’s approach to keep in mind the contexts and challenges of their local environments.

Given the complexity of Co-Impact’s approach, partners continue to push for a **more opportunities to develop a shared understanding of systems change**. Specifically, when asked about the one thing Co-Impact should focus on improving, sixteen partners requested more communication about and more resources outlining Co-Impact’s theory of change and the outcomes by which it sees systems change occurring (this was the largest proportion of suggestions). Round 2 and 3 partners, in particular, suggest

that Co-Impact’s handbook could provide more tangible examples of successful systems change projects.

In response to the same question about what could be improved, another ten partners (the second largest group) ask Co-Impact for **closer consideration of their local contexts on implementing and achieving systems change**. In fact, partners’ survey ratings for Co-Impact’s understanding of the social, cultural, or socioeconomic factors that affect their work remain in the bottom fifth of CEP’s comparative dataset. Describing their challenges, one survey recipient wrote, “I felt that Co-Impact’s approach to working with government as partners in a system approach could be more nuanced and not a one-size-fits all approach. Some countries are fragile and failing states and have dysfunctional governments that are not ready for partnerships – these countries need a different approach to the assistance given.”

Nevertheless, many interviewed partners also emphasize Co-Impact’s efforts to learn more about their environments and challenges. When discussing Co-Impact’s distinctive approach, nine partners specifically highlight Co-Impact’s desire and efforts to deeply understand their organizations and their local contexts. One Round 1 partner, for example, called Co-Impact a “heart” partner who understands their organization and their work as well as internal staff do.

When discussing potential opportunities for Co-Impact to adapt its vision for systems change to better incorporate their local contexts, partners drew on different experiences and examples:

- Considering that implementation is underway, **Round 1** partners most often mentioned this challenge in the context of **measurement and outcomes**. Partners across multiple initiatives wanted more leeway and flexibility in determining metrics of success and shared concerns about whether the metrics Co-Impact is prioritizing are the most appropriate for systems change in their context.
- **Round 2** partners sometimes describe Co-Impact’s systems change approach as **theoretical, overly detailed, and academic**. While they acknowledge focus on rigor and accuracy is important, this can result in partners feeling as if Co-Impact is imposing a pre-designed idea of systems change on their organizations without regard to the context in which they work.
- Partners in **Rounds 1 and 2** also highlighted additional moments when local contexts were not always appropriately embedded in Co-Impact’s work: when delivering abstract concepts in topical webinars that they could not understand or translate easily to their work on the ground, when Co-Impact resources were not aimed at solving practical problems that partners faced in the implementation (e.g., intra-partnership dynamics), and when asking questions about changes that partners propose (n=7).

Overall, across both Rounds 1 and 2, partners are aligned in their perception that the reality of systems change is messy, slow, and complex, which requires more patience, flexibility, and empathy from Co-Impact at every stage in the process. Partners encourage Co-Impact to acknowledge that circumstances “on the ground” are constantly evolving, to allow initiatives more autonomy and flexibility in decisions and changes that need to be made to accommodate local contexts, and to recognize the limitations of focusing solely on quantifiable outcomes.

## SELECTED INTERVIEW EXCERPTS:

*“Whereas on the one hand they’re visionary, in some ways they still fall into some funder traps - what are the specific outcomes? How are they measurable? Can you give a very specific set of modeled out projections for those over the next few years? And not to mention systems change being messy, add that, because of COVID, there’s a lot of uncertainty. The tradeoff between having an ambitious vision for something that’s messy and complex, which should be maintained and the requirements to be granular and specific and the ways that many funders typically require, is difficult. I think the desire ultimately for funders to measure on outcomes sometimes trumps the ability to be flexible on some aspects of uncertainty.” – Round 2 Partner*

*“It requires a lot of focus and input to try and understand what the theory of change is, what’s the process of change, what the systemic change realities would mean in a particular field in a particular geopolitical context. Every context has its own possibilities and limitations and even a systemic change goes through multiple goalposts until it evolves to a stage where it makes definitive impact at scale and at a sustainable level. And so there must be more patience and flexibility in understanding local context and the possibilities of the speed and the scale of change that can be expected.... It cannot be an inorganic push because then it won’t be sustainable as far as social change is concerned. If there is one thing that they should be a little more tolerant of understanding, accepting, and allowing for localization of systemic change models, as well as the nuances that go with it.” – Round 2 Partner*

*“Co-Impact sort of prides itself in having a very systems-driven approach [that] is also very organic in nature [but] I do think this is an area where they could strengthen this gap. Sometimes they are not taking into account the baseline level of the partner. They expect people to understand more than they’re maybe able to, maybe context allows. So now to give you an example of this – they have a lot of focus on gender, and inclusivity.... Even though they went through a lot of pains to emphasize this difference [of lived experiences], it was so high level, that for people who are really into implementing, were really hands-on, they would not get these nuances.... Lectures and intellectual discussions are great, but I feel that they will be totally a misfit for these types.” – Round 1 Partner*

*“There is a gap between them giving the impression that they know exactly what systems change is and their ability to articulate it in a way that actually translates into something in the real world that is observable by other people. I think they have this ... deep, deep, profound understanding of ‘what is systems change’ and ‘we know it when we see it’ - and then their ability to actually describe it in a reproduceable way.... The ability to actually describe these things in a way that corresponds to what real organizations have the potential to do has not caught up.... it leaves a lot of room for pure discretion.” – Round 3 Partner*

## The Co-Impact Handbook Is Valuable and Could Be Strengthened with More Examples

Overall, Co-Impact's handbook is seen by partners as a valued resource that helps them **understand Co-Impact's values and principles** and the "where" and "how" of Co-Impact's work. In interviews, many partners describe their appreciation of its conceptualization of systems change, and several noted that they used the handbook as a reference throughout their engagement. In the words of one Round 2 partner, "It's almost like a textbook for how to do system change."

The handbook is used primarily by current partners: more than 80 percent of grantee partners have read some or all of handbook, but only half of applicants had engaged in this way. There are differences in handbook use and value by partner type, depending on their Round and tenure with Co-Impact: partners in Round 3 agree more strongly that the handbook has **provided clarity about Co-Impact's goals, values, and approach**, and that it has provided information that has contributed to their work. Perhaps unsurprisingly, Round 1 partners agree less strongly than other partners that the handbook has provided information that has contributed to their work.

In interviews, partners were most likely to praise the handbook for helping to facilitate a shared understanding of Co-Impact's work (n=20) and to shed insights on its theory of change (n=8). Notably, several also praised the commitment to transparency by sharing information about Co-Impact's approach and priorities (n=7).

When asked how the handbook can be improved, partners – especially those in Round 3 – shared ideas centered primarily around a desire for more **examples of previous projects** supported by Co-Impact and **more specificity** about "mundane, practical" aspects of the engagement – for instance, timelines, evaluation criteria, or expected time commitments. Additionally, five partners suggested simplifying the language used in the handbook, sharing that it felt "jargony" or overly complex and theoretical at times, making it less easily accessible for on-the-ground practitioners. Another five partners mentioned the handbook's length, noting that not all organizations have the capacity for a close review of the text (n=5). Specific suggestions from partners from each round can be found in Appendix B in the accompanying report.

### SELECTED INTERVIEW EXCERPTS:

*"[The handbook is] very well developed, very well presented, and very well done. Our biggest issue is that there is lack of time internally for us to transfer the knowledge from that manual to the team. Maybe you could create something lighter, easier to [digest] for the team. Maybe capsules, tips, or something like that, that could be transferred directly to a team."* – **Round 1 Partner**

*"[The handbook] is a bible I carry. It's always next to me. But I think they could reduce it to half. Every line that they have written is a piece of art. How do we retain that and yet not make it voluminous?"* – **Round 2 Partner**

*"What could have been helpful in accelerating our understanding of what they were getting at is some examples of how they have seen [systems change] implemented, done well. What examples of systems change could they share in different sectors? They've done a few projects now. They've got quite a lot they could share, even at fairly high level, like mini case studies."* – **Round 3 Partner**

*"The handbook does a good job of setting out Co-Impact's thinking around how we achieve this kind assistance, and what is it that organizations need to do to examine their own internal operations to consider how best to achieve the goals that they're interested in.... it felt kind of jargony to me in some*

*places. The use of the language like ‘fulcrum,’ they do explain it, but a little more plain language could be useful at some points in the manual.” – Round 2 Partner*

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## **Recommendations**

- Celebrate improvements in ratings on clarity of communications from 2019 and continue current clear messaging about Co-Impact’s systems change focus, particularly the new focus on gender equity.
- Consider publicly sharing examples – of currently funded projects, or other organization’s work – that can facilitate more understanding of how to translate systems change theory into practice, especially how to do so when the theory runs up against the practical challenges of specific local environments.
- Building on current plans to hire place-based staff, prioritize developing and demonstrating understanding of partners’ local contexts – the challenges and structures in their communities, governments, economies, and more. Use site visits to build understanding of what partners are experiencing “on-the-ground.”
- Clarify the goals of the handbook: if intended primarily for building understanding of Co-Impact’s approach and theory of change, consider streamlining, “de-jargoning” and simplifying the language.
- In the handbook, provide case studies of successful systems change partnerships: help partners understand those initiatives’ translation of theory into reality. Share up-front with partners where they can find more specific information about the details and requirements of their Co-Impact engagement.

# THEME #2

## The Design Grant

All Round 2 partners express gratitude for the immense learning experience that the Design Grant and the engagement with Co-Impact provided, and simultaneously indicate the toll it has taken in terms of time and opportunity cost for their organizations.

## THE DESIGN GRANT – INTENSE BUT ENRICHING

Mirroring feedback from 2019, Round 2 partners experience the design grant phase as a steep, enriching learning experience, with touchpoints with Co-Impact leading to changes in the way partners think about their own work and their organization's place in the ecosystem. One Round 2 partner shared, "It was a huge learning experience in the way we thought about systems change. Work that happened during the design phase really influenced our work."

In fact, when asked what was most valuable about Co-Impact's design grant process, 24 percent of Round 2 partners shared that Co-Impact's ambitious vision of systems change inspired their organizations to rethink their own approaches. One survey recipient writes, "Even if the design phase is not fully successful in resulting as a systems change grant, the very involvement in the design phase process is highly rewarding for us as an organization."

In the survey, when asked the extent to which the design grant and the process of working with Co-Impact during the design grant was helpful, items most highly rated by Round 2 partners were:

- *"A concept and prospectus that will be helpful to us in conversations with other funders,"*
- *"Incorporating a gender approach to my initiative's design and internal practices," and*
- *"Allowing for dedicated staff time to create a bigger and/or more rigorous vision of our future work."*

When asked in interviews what could be improved about the design grant in interviews, more than one quarter of Round 2 partners suggest for the design grant to be streamlined. All Round 2 partners shared that they spent significant amounts of time on the design process over the past year, with some describing having had to put most of their organizations' other work on hold and flagging the opportunity cost of having done so. One partner writes in the survey, "The process does require a very heavy lift from many partners on our team, which has a real opportunity cost. It would be great if Co-Impact could try to condense that learning process into a more compact and reasonable timeframe."

Moreover, one Round 2 partner expressed concern that the complexity and intensity of the design phase process makes it hard for smaller, grassroots organizations to be included. On a similar note, a partner writes in the survey, "Though Co-Impact does proactively focus on organizations based in the Global South, it does seem that they have a preference toward already large [organizations] or consortia with members in the Global North. There is a risk of the 'big getting bigger' to consider and the asymmetries of power/resources that might unintentionally exacerbate."

Survey data corroborates the intensive time required in the design phase; Round 2 partners indicate only slight overall agreement that the effort required by their engagement with Co-Impact was appropriate considering the funding they may receive (rating, on average, 4.7 on a 1 to 7 scale). They make various suggestions for how the design grant could be streamlined:

- Three partners suggest having **less frequent check-ins** with Co-Impact, saying that the preparation for each monthly call and the internal stakeholder management needed to get on one page took their organizations' leadership a significant amount of time.
- Other partners suggest **paring down the amount of time devoted to theoretical exercises** that do not end up being used in the Prospectus. As one partner shared, "I think a challenge in the systems change approach is trying to figure out what is theory or best practice versus what works or what we think will work... It can feel like we get overly academic and not as practical."

- Another partner suggests that the number of **iterations required by Co-Impact** – by receiving ongoing feedback or questions about information shared – makes the engagement feel intense.
- Finally, another Round 2 partner suggests **shortening the length** of the Design Phase process altogether to 6-9 months.

Round 2 partners also shared challenges with the following (each of which is explained more fully elsewhere in this report):

- Adapting Co-Impact’s theory of systems change to their complicated, real-world settings,
- Co-Impact’s understanding of their sociocultural and geopolitical contexts,
- Inter-organizational dynamics within their coalitions,
- The indirect role of donors.

### **Design Grants Helped Shape Experience of Round 3 Partners**

In interviews, Round 3 partners who have advanced to the design grant stage express excitement about the potential for the grant to help their organizations thoughtfully prepare an ambitious idea and appreciate that it is “so different than other funders.”

One Round 3 partner elaborates, “It’s been a journey to really force you to not just think about why this is such an important approach for system change, but it also gives you that excitement to know that there’s this grant support that will allow you to take all of your thoughts and all of your visions and all of your plans to paper in a very thoughtful way. So, that outcome of that document, to me, is not just that we could possibly get funding from Co-Impact further on. But actually – they’re giving you an asset that you can utilize in multiple different places again.”

Perhaps unsurprisingly, Round 3 partners who did not receive the design grant provided less positive ratings on several key measures than those who did receive the design grant. Partners without design grants rated less positively about the clarity of Co-Impact’s communication of its goals and strategy, their comfort approaching Co-Impact if a problem were to arise, Co-Impact’s transparency, and the helpfulness of the information on Co-Impact’s website. They agreed less strongly than other Round 3 partners that the effort required by their engagement with Co-Impact has been appropriate, rating more than 1 point lower on a 1-7 scale.

#### **SELECTED INTERVIEW EXCERPTS:**

*“It’s opening up a new or an imaginative way of viewing the whole ecosystem in which our initiative was located. I don’t think we should call Co-Impact people funders. They were more like a partner walking that mile with us of trying to understand. And we’re trying to understand the pushbacks and deep questioning.” – Round 2 Partner*

*“It has felt really demanding. I spent about 80 percent of my time on the process and several team members as well. And so, while incredibly rewarding, I think the process has been long and relentless.” – Round 2 Partner*

*“I think it would have been helpful had we had a real clear sense of this is how much work it’s going to take. This is a grueling process. Just get ready because the outcome is wonderful.” – Round 2 Partner*



*“[Having] a peer mentor who’s been through the process and to whom you can turn for advice and just to brainstorm ideas, would have been super helpful...moving forward into Round three, I would recommend they think about identifying some volunteers who’d be willing to serve in this kind of mentor role.” – Round 2 Partner*

*“The length of process made it possible to think very critically about what we're doing. At the same time, with only [limited] staff, there’s an opportunity cost to doing this versus other work. Is there a way to streamline the process for smaller organizations?” – Round 2 Partner*

*“There were times when we felt like we were really learning from them quite genuinely... But then there were other times where we were just doing it for the funder, and an example of this might be spending time analyzing 20 different case studies of systems change in different countries historically. Many aspects of the system mapping exercise could have just been more efficient, specifically trying to map out the system that we’re trying to change.” – Round 2 Partner*

*“They were really humble in their approach and yet challenging. By the end, the reason I really wanted to get the design grant was because I felt like the support and engagement we would get from their team would add so much value to us as an organization and the way we think about impact in terms of systems. Just that in itself, even if they weren’t giving us any money, would be valuable to me. It was almost like going through a mini consulting process, and it’s had lasting impact on the way we think about our system approach.” – Round 3 Partner*

### **South Africa Workshop Seen as Very Valuable and Essential for Future**

Eight out of nine interviewed Round 2 partners indicate that they were able to attend the South Africa workshop in February 2020. When asked about the helpfulness of the workshop to support their initiatives to achieve lasting systems change, the average rating was extremely high: a 6.5 on a 1-7 scale. It was the highest rated among all webinars or workshops Co-Impact provided. All R2 partners indicate in the survey that it is either *important* or *very important* that Co-Impact continues to provide the South Africa workshop.

In interviews, South Africa workshop participants were unanimously positive about this experience, with six partners indicating it allowed them to connect and build relationships with other partners and Co-Impact staff. Participants particularly appreciate the opportunity to meet and connect informally in between the sessions. Moreover, five partners shared that the content of the workshop – particularly the theory on systems change – had a profound impact and made them reshape or reconsider their own coalition or organizational strategies. One partner also mentioned the gender presentation during the South Africa workshop as a very positive experience.

In future years, two partners suggested streamlining the theory shared during the South Africa workshop, with one sharing, “Too much time was spent on the theoretical; we could have skipped some of that.” One partner felt there was so much new content shared in a short amount of time that it felt overwhelming, suggesting adding another day to allow for more breathing space in between. Another partner suggested not to start the workshop on a Sunday and to rather stick to week/working days.

## SELECTED INTERVIEW EXCERPTS: (ALL ROUND 2 PARTNERS)

*"I found the time in South Africa the most rewarding because you had time to engage in the thinking. It's hard, design thinking. It kind of hurts your head as you think about things and then get them poked at, and your assumptions challenged, and you want to keep rethinking it. It gets much harder to do that in a monthly check-in format. You touch in on the idea and you get a lot of very good, quick feedback, which is rich, and you go and think about it again."*

*"It was great to meet the other participants, and a lot of engagement and learning...I think we had a number of sessions that were sort of downloads of theories of systems change, which were definitely helpful, because it then provided sort of the context for the exercises that followed. But it would have been great to have more specific space for just that incredibly rich expertise and diversity of experience to emerge, in the context of 'how do we bring about systems change?' People have different approaches, and we talked about it over supper, but I think it could have been formulated and synthesized in a couple of sessions as well."*

*"After the shortlisting, the design process workshop was very helpful.... I hope that they will continue to keep that because it gives a very good understanding of who they are beyond just what is available on the website and hearsay. It actually allows us to meet the people behind those who founded it and those who are running it, their passion and their vision."*

*"Everything was said in that one week. You can't take it all in at once; internalizing and operationalizing it takes time.... It's humanly impossible to go deeper...The actual proof of pudding is in implementing afterwards. One or two days more would have been helpful; felt slightly rushed throughout sessions."*

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## Recommendations

- Considering its highly positive reviews, continue providing workshop(s) like the one held in South Africa.
- Consider streamlining the Design Grant process, either by decreasing the frequency of check-ins with partners, shortening the overall process, limiting the number of iterative requests, and paring down the number of theoretical exercises expected.
- For partners who will receive the design grant, provide additional upfront information on the expectations and time requirements of the design grant.
- For Round 3 partners who were shortlisted but will not receive the design grant, consider ways to formalize, or set clearer expectations for, the value added by Co-Impact's feedback and due diligence process.

# THEME #3

## Relationships with Partners

Positive Interactions with Partners and Managing  
the Dynamics of a Collaborative Approach

## RELATIONSHIPS WITH PARTNERS ARE A KEY STRENGTH

Relationships and interactions with the Co-Impact team stand out as a key strength of partners' experiences with Co-Impact.

The value that staff contribute through their expertise, approachability, and professionalism was mentioned as crucial to the overall experiences of more than 15 percent of interviewees. Partners praise the insights and thoughtfulness that Co-Impact staff bring to their work, as well as the warm, yet candid, relationships that they have built. A few interviewees described feeling that Co-Impact is not just a funder, but a partner on their journey.

As in 2019, partners commend Co-Impact's collaborative model, describing their interactions as characterized by respect, understanding, and openness. Still, some opportunities exist to ensure that the effort required by check-ins and meetings is not overly burdensome to partners and to address perceptions of transparency and responsiveness from declined applicants, whose perceptions are less positive than in 2019.

### **Evolving and Valuable Relationships**

Survey data reveals **meaningful improvements** in several measures related to partner interactions. Partners rate Co-Impact significantly more positively for its transparency than in 2019, with average ratings now similar to the median funder in CEP's dataset. Co-Impact's staff responsiveness is also rated more positively – especially by Round 2 partners. When asked about Co-Impact's approachability when they reach out with a problem, partners rate significantly more positively than in 2019. Still, their overall average ratings remain in the bottom ten percent of CEP's comparative dataset.

One Round 1 partner describes recent changes in their relationship: "In the early days we felt pushed beyond our comfort zone.... But over the last couple of years, it's been really awesome to develop a relationship with Co-Impact, which really does feel extremely supportive. Before there was a lot of, 'the donors need this,' and now, 'most of the beneficiaries need this.' There's been a huge shift in how we engage, and it's become an extremely supportive relationship."

In interviews, interactions are characterized by a **high level of engagement, professionalism, and openness** (n=25) and the value added by staff's insights and expertise (n=18). One of their Co-Impact contacts, a Round 1 partner notes, is "not just willing to be an advisor, [but] rolls up [their] sleeves and actually works collaboratively with us." Partners trust Co-Impact: when asked if any topics are off-limits in their conversations, most partners interviewed noted that they could bring up anything with the staff.

### **SELECTED INTERVIEW EXCERPTS:**

*"[Interactions have changed] Massively so. We had a more formal type of relationship... Across time, we really became more collaborators opposed to people trying to figure out how to formally interact with each on an organizational level." – Round 1 Partner*

*"Highly professionalized. I think they were very interested and had done their homework ... They came prepared with questions. They seemed very genuinely interested in the work and what we were doing, asked difficult but thorough questions. Despite some of the things we've highlighted, there was a good degree of transparency on the process, and very just responsive and lovely people to be talking with." –*

**Round 3 Partner**

## Suggestions to Streamline and Simplify Communications

Still, some opportunities exist to further improve partner interactions. Specifically, Round 1 partners across multiple initiatives describe the **effort to manage their relationships** with Co-Impact as more time-consuming compared to their other funders, with working relationships described by a few partners as “micromanagement.” When asked in interviews about areas where Co-Impact could spend less time, seven different individuals advised Co-Impact to reduce the frequency of their interactions and find better “time efficiency” in its engagement with partners.

In addition, partners in Rounds 1 and 2 most often suggest changing interactions by making them less time-consuming, both in terms of the frequency of check-ins and the level of information required. One Round 2 partner described their experience as: “With every request, it was met with another request. We would submit something to them, and it was like, ‘Well, have you thought about these three other things?’ At some level I [thought], I don’t think we can satisfy this team.”

Several interviewees, mostly Round 3 partners, suggested that Co-Impact could **simplify its language and materials to better reach “ground-level people.”** One Round 3 partner notes, “The whole style of the initiative is very cerebral. I wonder about if we were a less internationally exposed, more operational team doing good work, would we have been able to navigate the Co-Impact language way of communicating? If they want more focus on global south organizations that don’t have necessarily master’s degrees in development studies from top universities but are doing really good work on the ground and are actually involved in systems change and might not call it that, is there a way of communicating that’s a little bit more accessible?” Other partners note that Co-Impact’s interactions display “an overtone of western professional culture” and “Western/American English style of conversation,” which can exclude those who speak less English, are less familiar with certain terminology, or are less able to quickly respond in verbal interactions.

### SELECTED INTERVIEW EXCERPTS:

*“Sometimes in those [check-in] meetings, we spend a lot of time on micromanagement on little tiny details. Maybe more time, more space could be given to strategizing and dealing more with the analysis of the project, and the challenges.” – Round 1 Partner*

*“They’ve designed a process that is so sophisticated and complex that only elites can jump through the hoops that they’ve set out.... Nobody that is grassroots is going to make it through these hoops and the complexity of this process without understanding the unwritten rules. I think they aspire to a process that grassroots organizations will succeed in; I don’t think that they’re there yet. I don’t think most grassroots organizations would be able to find their way through the complexity of this program or process.” – Round 2 Partner*

## Relationships Outside of Co-Impact

Considering its unique structure, partners must balance a multitude of relationships in addition to their relationship with Co-Impact staff: relationships with other organizations within their consortia, indirect relationships with Co-Impact donors, and relationships around Co-Impact as an organization in the broader sector.

## More Attention Needed on Managing Intra-Partnerships Dynamics

As in 2019, many partners commend Co-Impact's encouragement of individual organizations to form consortia, particularly across novel actors and regions, to achieve impact at a larger scale. At the same time, several partners describe perceptions of the **practical challenges around communications and collaboration** resulting from Co-Impact-facilitated coalitions or multilateral partnerships that remain unresolved.

When asked about challenges in communications, over ten percent of interviewed partners in Rounds 1 and 2 mentioned partnership dynamics. This was particularly prevalent for Round 2 partners during the design grant phase, with one in five asking for help mitigating partnerships dynamics. Partners most commonly voiced concerns regarding:

- The necessity to build a coalition **according to Co-Impact's suggestions** to be successful in the selection process, as opposed to building partnerships based on their expertise and interests.
- The level of effort required to **work with unfamiliar organizations**. For instance, one Round 2 partner shared that building trust between previously unknown organizational entities and bridging organizational cultures required substantial additional time and burden.
- **Unequal power dynamics**. Across two Round 2 initiatives, partners felt they did not have the same access to and/or information from Co-Impact as other organizations in their consortia, resulting in fewer learning opportunities for their organizations.

In response to these challenges, partners ask for more clarity on when Co-Impact would be willing to intervene in consortia dynamics and what should be resolved internally by partners.

## Continued Opportunity to Better Manage Communication Between Donors and Partners

Another theme that re-emerged from the 2019 partner feedback is the role of Co-Impact's donors. Partners acknowledge Co-Impact staff's predicament of "coordinating a group of funders that are disparate, have different mandates, have different ways of working" and express gratitude for their efforts for Co-Impact acting as a "buffer." Still, when asked about their challenges with communication, five partners, concentrated in Round 2, noted that multi-layered communication continues to be a limitation on honest and open relationships and adds burden to their organizations.

In particular, partners request **more transparency about the role of donors** as well as Co-Impact's role (as a representative of the applicant or the donor) and **more assistance understanding the origin and intent of feedback and requests**. Some Round 2 partners requested more clarity on which feedback comes from Co-Impact staff and which comes from donors. Two Round 2 partners felt pressured to embrace donor-supported concepts or answer questions following their investor presentations in ways that felt jarring or antithetical to Co-Impact's values and approach. Another two Round 2 partners expressed challenges with the total funding amount unexpectedly declining halfway through the Design Phase process. One survey recipient writes, "It was very challenging to learn that the total funding envelope was smaller than anticipated, and try to adapt the ambition of the prospectus."

One Round 1 partner notes, "It's very obvious to us that Co-Impact feels accountable to its donors. Those donors ask questions. They try to find ways to relay those questions to us, but at the end of the day, if they don't get answers to those questions, they're probably in some trouble. I think instead of

systematizing or normalizing that process... it's like we're having this breezy, lightweight relationship, but here's a page-long email and I need a response to this. There could be a bit more candor around that and that would help grantees plan for and resource what it really takes."

Sharing some frustrations with communicating their organization's approach, one Round 3 partner described asking their Co-Impact contacts, "Help me understand what you're trying to understand;" Co-Impact replied, "Our job is to find all the different nuanced ways to answer this question for all the different people that we need to report to, who will then finally make the decision."

Perhaps relatedly, some Round 1 partners wondered how the relationship with Co-Impact would continue after their funding would run out. Three partners, concentrated mostly in Round 1, expressed curiosity around how Co-Impact would continue to engage with their organizations once funding, or the possibility of funding, was no longer active.

#### SELECTED INTERVIEW EXCERPTS:

*"I think they find themselves in a difficult situation. I think they try to play a neutral role, but ultimately having to represent and give confidence to the funders that they think the proposal has merit. ...what's not clear to us is, is exactly what the process of mediation is, obviously, between the secretariat and the donor group, and really, where does the balance of power lie?"* – **Round 2 Partner**

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## Recommendations

- Celebrate that partners see Co-Impact staff as a bright spot in their experience. Continue momentum on improvements in interactions, particularly considering barriers to approachability when partners are facing problems.
- Make check-ins and information-gathering calls easier on partners. When possible, send questions and set agendas ahead of phone calls to give organizations time to prepare, especially if all staff are not fluent in English.
- Share more context about what donors want to know; be more direct about the "why" behind their communications, priorities and concerns (for instance, changes to the amount of funding that partners can expect from donors). Relatedly, be more explicit about what feedback comes from Co-Impact staff versus from donors directly.
- As in 2019, given the challenges partners face in managing consortia, continue to refine guidelines around communications and roles and responsibilities, and determine how Co-Impact should be involved in intra-partnership dynamics.

# THEME #4

## **Application and Reporting Processes**

Shaping Ideas and Reducing Pressure on Partners  
in Rigorous Application and Reporting Processes



## APPLICATION AND REPORTING PROCESSES

As in 2019, Co-Impact's partners view its application and reporting processes as time-consuming, yet helpful in pushing them to refine their approach and reflect on what they have learned.

Both survey ratings and partners' observations point to improvements in process over the past two years. Compared to 2019, Round 2 and Round 3 partners agree more strongly, on average, that the effort required by their engagement with Co-Impact is or has been appropriate, given the size of the funding and the odds of receiving it (nearly three-quarters of partners agreed with that statement, and fewer than one quarter disagreed).

When asked about the extent to which their engagement with Co-Impact and its processes contributed to their work, all partners rated most positively for the extent to which it enabled "a bigger, more powerful vision for systems change that we and our organization are excited to pursue."

**Differences in perceptions by round:** In general, the most positive perceptions about the engagement with Co-Impact and its processes came from Round 2 partners, whose ratings trend more positively than partners in Rounds 1 and 3 for most measures.

Co-Impact's partners appreciate that Co-Impact's process centered on their organizations' key strengths while allowing for adjustments to reflect shifts in strategies or changes in the field. Although most interviewed partners in Rounds 2 and 3 stated that the basic idea of their initial project had changed over the course of their interactions with Co-Impact, fewer than five directly pinpointed Co-Impact as *pressuring* them to make changes to increase their likelihood of receiving funding.

These interview takeaways are bolstered by survey data: In 2019, grant partners reported more pressure than grantees of nearly all other funders in CEP's dataset. This year, partners report feeling substantially less pressure to modify their priorities to create a grant proposal likely to receive funding.

### SELECTED INTERVIEW EXCERPTS:

*"It's truly been one of the best application process I've ever been a part of in many ways. It was very transparent from the beginning. The calls that we had with the team were great. They had great questions. I think even if we hadn't been selected for a... grant, we wouldn't feel like this was such a waste of time. In this case, it never felt like we were putting a level of energy that didn't make sense for the process. We were treated with respect."* – **Round 3 Partner**

*"We had grossly miscalculated the time commitment from our side. This was probably 80 percent or 90 percent of what I did during the last, nine, 10 months."* – **Round 2 Partner**

*"They allowed the organization to retain our uniqueness, our work, and our thought process... That is something they should retain; in helping the organization travel the journey in a way the organization would like to travel."* – **Round 2 Partner**

*"They want to be saying that they are not influencing our agenda, but it's untethered from reality to say that a funder of that size is not influencing a non-profit's direction. I think they would be better off trying to look at whether what they are interested in funding is in tension with the mission and organizational direction of the grantees. You don't want to be distracting an organization from its mission and comparative advantage."* – **Round 3 Partner**

## Effect of COVID-19 Pandemic

The COVID-19 pandemic substantially changed the expected engagement for many of Co-Impact's partners. For most, Co-Impact's response – particularly the changes to process timelines – were welcome and helpful. Most partners interviewed had positive impressions about how Co-Impact handled the changes required by the pandemic, noting that staff have been “supportive,” “flexible,” and “accommodating” (n=20) and have made real efforts to understand their organizations and their contexts (n=13). Many also note an appreciation for extended timelines and changes to their initial plans (n=9).

Still, the effects of the pandemic presented real challenges. Some partners, primarily across Rounds 2 and 3, regretted that the loss of an in-person site visit made it difficult to demonstrate their work most effectively. These partners noted that Co-Impact was unable to see the impact that their organizations were having “on the ground” and most noted that when Co-Impact cancelled their site visit, they did not offer a virtual option as a replacement.

### SELECTED INTERVIEW EXCERPTS:

*“I don't think it has changed in terms of [COVID-19]. We do [meetings] virtually all the time.... [What] may have changed the content of discussions around the impact of COVID and how we are taking opportunities that come with it and also mitigating any long-term impact...what approaches we might be able to use during this time that we would not traditionally used just because things have changed. We end up discussing things we would not have discussed.” – Round 1 Partner*

*“[They asked] frequently about how COVID-19 was affecting our work, how we thought it would affect the design process and their partnership. I thought they did a good job asking all of the people going through this year's cycle what they might need in terms of additional time. They adjusted their calendar accordingly, I think, not to our singular opinion but the cohort's opinion.” – Round 2 Partner*

*“It was all on Zoom....We always feel that people get a much better idea of our program when they visit us, and a much better feel of the program when they see it for themselves. So, we missed that, which would have happened normally last year, which couldn't happen because of COVID. We take a lot of pride in showcasing our program to people. But I'm sure it will happen at some point of time or the other during this process.” – Round 3 Partner*

## Application Process

Round 3 partners and applicants were asked a series of survey questions about Co-Impact's application process. Taken together, both groups agree most strongly that the expectations about the timeline were clear, that the materials were accessible (e.g., in their native or preferred language), and that the information on the website was helpful as they developed their proposal.

Ratings from declined applicants suggest opportunities for more clarity in Co-Impact's communications about the rationale for its decisions. These respondents agree *least* strongly – on average, proving ratings close to a 4 on a 1-7 scale – that blog posts and webinars intended to explain the rationale for Co-Impact's decisions were helpful, and they generally provided lower ratings than Round 3 partners for all aspects of Co-Impact's application process. What's more, compared to 2019, Co-Impact's declined applicants now provide less positive survey ratings for Co-Impact's transparency with their organizations and Co-Impact's responsiveness.

### Experiences Specific to Round 3 Partners

Overall, most Round 3 partners agree that the effort required by Co-Impact's process is appropriate, given the grant size (n=18) and note real benefits to going through the process. Primarily, they describe ways in which it helped them "think through their priorities and strategy," "summarize and organize their thoughts," and "push their thinking" (n=18). A smaller group also shared appreciation for the feedback provided by their Co-Impact staff contacts (n=7). One Round 3 partner who did *not* receive a design grant explained, "Despite not getting the grant, we understood why and it's making us reflect about what things need to improve in our own strategy for a future proposal to Co-Impact or to another [donor]."

Nevertheless, several Round 3 partners describe the process overall as "intensive" despite the support provided by staff and the benefits of honing their ideas. One notes that "the reality of power dynamics between donors and recipients" led them to create new materials and resources for their application, even when instructed by Co-Impact not to do so (a sentiment echoed by several others). When asked to name potential improvements to the process, five Round 3 partners suggested more guidance on specific requirements – for instance, advance notice on the materials required at each stage, information about how changes could be made along the way, and clarity on Co-Impact's funding criteria. One partner noted that much of their effort was "in the dark" – guessing what Co-Impact might want. They suggested that it would have been more efficient if they had a sense of what Co-Impact was looking for, perhaps through written sharing of outstanding questions.

Finally, six Round 3 partners – predominantly those who did not receive the design grant – note that Co-Impact could recognize the time and resources spent by their organizations with a small grant, as they noted certain other funders sometimes do, or that Co-Impact could facilitate connections to other funders who could help them move their proposed ideas forward. Partners' survey results show that Round 3 partners provide less positive ratings than other partners for the extent to which Co-Impact and its processes contributed to "new or improved connections to additional sources of funding for their work (besides Co-Impact)" – rating just over a 3 on a 1-7 scale.

#### SELECTED INTERVIEW EXCERPTS:

*"I would appreciate seeing a bit more specificity, maybe through illustrative examples. When you say a 'system,' are you talking about a law? Policy? Is [it] culture, mindset, creating a new field, or all of the above? Are there any illustrative examples of system change, goals or strategy that you could share based on the program partners that you are already supporting? I understand, it can't be and shouldn't be prescriptive. Still, we're all trying to tell our story through their lens and their language, right? And of course, we won't misrepresent or change what we do to fit what Co-Impact does. But whatever could help us quicken the process of finding that overlap, the nexus between our work and Co-Impact's theory and understanding of system change, would be immensely helpful."* – **Round 3 Partner**

*"[Though] we didn't actually ultimately get accepted into the final selection, the rounds have actually been extremely impactful for our organization. We've made tangible investments in changing some elements of our organizational development as well as our theory of change in the work that we do, based on some of the very thoughtful and candid reflections and feedback that the Co-Impact team shared with us."* – **Round 3 Partner**

## Reporting Process

In 2021, Round 1 partners were asked a new series of interview questions about their experiences with the reporting process. In line with sentiments regarding Co-Impact's application process, all partners had positive perceptions of its value given the effort required.

When asked about the most helpful parts of the reporting process, nearly two-thirds (n=12) of R1 partners used reporting as a natural moment to pause, take a bird's eye view, and reflect on progress and lessons learned. Two partners specifically mentioned how these reflections were crucial for making adjustments to their work, and two additional partners used discussions about submitted reports to build their understanding of how their work fits into the larger context of Co-Impact's goals and strategy.

From a more tactical perspective, another theme mentioned related to the helpfulness of having set timelines for reporting. Three partners mentioned the importance of having report submission deadlines outlined explicitly in their grant agreements to mitigate some informal document requests.

Still, like Co-Impact's application process, the reporting process was most commonly characterized by its intensity. Six partners encouraged Co-Impact to streamline, especially because the structure of its investments often contributed to the level of burden. For example, six partners across multiple initiatives described the high level of effort required to gather and consolidate data for their initial report – given differences in how information is collected, at what points in time, and by whom. In the case of one initiative, it took an entire week to find alignment on the template for the report and to delegate roles. Given such challenges, a small number of partners (n=3) asked Co-Impact to provide clearer guidance around what they would like to see in reports and whether submitted reports met their expectations.

### SELECTED INTERVIEW EXCERPTS:

*"I don't think as a partnership we're always super clear on exactly what's the real crux of the reporting. The reports are very long, so is that because they really want to know all the information, or is that because we're scatter shotting a bit...trying to cover everything because we're not exactly sure what they want to hear? There can be some sharpness and fine tuning in the reporting. Sometimes I almost feel like they themselves don't really know what they really want, like it's a process of discovery for everyone."* –

#### Round 1 Partner

*"When you are reporting, it makes you really introspect and think what you have actually done. it is tough for us, but it makes us work a little harder to articulate what we have been doing."* – **Round 1 Partner**

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## Recommendations

- In both the applicant and reporting requirements, consider the balance between rigorous planning in measurement and outcomes and the desire from partners for more space for necessary adaptation and flexibility.
- Examine the changed perceptions of declined applicants, who report less positive experiences than in the past and struggle with Co-Impact's rationale for their declination. Are there differences in the applicant pool, in communications, or in the process?
- Consider sharing more questions and materials with partners in advance.
- Discuss with Round 3 and Round 2 partners any plans for future post-pandemic visits to the field or virtual site visits in the meantime to see their work in action.

# THEME #5

## Co-Impact's Resources

Strengthening organizations by providing non-monetary supports

## CO-IMPACT'S RESOURCES

### Supports Beyond Funding

When asked directly about where Co-Impact has been directly influential in their work beyond financial support, Round 1 partners shared different ways in which Co-Impact has **affected their thinking and approach**. About a quarter mentioned changes to their organizations' future goals and strategy, eleven percent mentioned increased clarity around the broad goal of systems change, and eight percent mentioned the benefit of adding a gender dimension to their work.

When asked about additional ways that Co-Impact has provided non-monetary supports, half of Round 1 and Round 2 partners indicated that Co-Impact has changed their view of what is possible to achieve (n=12) and helped develop new relationships or collaborations (n=11). Moreover, partners shared examples of support in securing additional funding (n=7), involving and convening new actors and/or regions (n=6), and bringing visibility to their work and their organizations (n=4).

In surveys, Co-Impact's partners were asked how Co-Impact could prioritize its offerings as it continues to grow its portfolio. The largest proportion of partners – 79 percent – indicated that it is very important that Co-Impact should **do more to help partners connect to additional donors**.

- Interest in Co-Impact's topical workshops appears to decrease as partners move further along into the process: a third of Round 1 partners indicate Co-Impact could provide fewer topical workshops.
- The level of desired engagement varies across rounds: more than half of R1 partners suggest Co-Impact should strive to check in more about progress, while the majority of R2 partners believe Co-Impact should maintain or lessen their current level of engagement.
- In interviews, a half-dozen Round 3 partners recommended that Co-Impact offer additional supports to applicants who do not advance to the design phase – for instance, by providing them with copies of their due diligence reports that they can use to refine their process for future grants to other funders, by “matchmaking” with other funders in Co-Impact's network, or by offering small grants for recognize the efforts spent on the application by shortlisted organizations.

### SELECTED INTERVIEW EXCERPTS:

*“They often try to force how they could be helpful beyond connecting you to funding, [and] I’m not sure that people really needed all those other things they were trying to offer. I think there was always a feeling that they wanted us to be able to say what these other things were, and we weren’t sure that they were the best position to provide them necessarily.” – Round 1 Partner*

*“Continue to work with folks like us who actually didn’t get the grant -- and yet, they saw a lot of promise in what we’re doing. A bit of a stock check, or a catch-up once in a while. It would help us to be more strategic and to add value to what we are doing. Co-Impact is made up of a lot of varying sizes of donors and collaborators. That puts them in a unique position where they can refer a powerful idea which may not have met the cut for them, but they could act as matchmakers for that with other funders or donors or supporters, or even researchers, or collaborative partners. They’ve had a view in what we can do, and they’ve been really supportive of it. That matchmaking may not take a lot of time, but may lead to a lot*

*of unintended, positive outcomes from this process for potential grantees that they like, and who are doing credible work.” – Round 3 Partner*

## **Workshops and Topical Webinars**

Co-Impact offered a variety of non-monetary offerings to its Round 1 and Round 2 partners, such as workshops on gender, intersectionality, outcomes, political economy, winning coalitions, and constituent feedback. Most notably, Co-Impact kicked off the design grant phase with its Round 2 partners with an in-person workshop in South Africa (discussed earlier in this report in the context of the design grant).

Participation varied by topic:

- Aside from the in-person workshop, the most highly attended offering was the webinar focused on the three types of outcomes – people, system, and organization – with a participation rate of 43 percent. This was followed by webinars focused on gender, political economy analysis, and winning coalitions, with participation rates between 20 and 30 percent.
- The webinars on intersectionality and constituent feedback, on the other hand, were attended by fewer than 10 percent of partners.
- Webinars on winning coalitions and gender were rated as extremely helpful, receiving an average rating above 6 on a 1-7 scale. Echoing sentiments from the interviews, Round 1 partners found the gender workshop to be particularly helpful.

### **SELECTED INTERVIEW EXCERPTS:**

*“The workshop on indicators that was provided by Co-Impact...generated a lot of strategies on how to bring down to the field level those objectives of system change. That was taught by a specialist and it helped us to transfer knowledge and scale down the indicators.” – Round 1 Partner*

## **Organizational Strengthening**

Six partners specifically name Co-Impact’s approach to and emphasis on organizational strengthening as one of its most distinctive features. This is primarily driven by the provision of the design grant (as discussed earlier in this report). Co-Impact’s focus on building partners’ organizational capacity extends beyond the design grant, particularly for Round 1 grantees, through an organizational strengthening grant. Interestingly, unlike the design grant for Round 2 partners, this topic rarely came up in partner interviews, and when it did, was sometimes referenced as an opportunity for improvement.

Partners’ perceptions may be influenced by Co-Impact’s communications about this topic in the organizational strengthening guidebook.

- About two-thirds of Round 1 survey respondents indicated that they were at least aware of Co-Impact’s guidebook on organizational strengthening, although most have not read it. About the same proportion of Round 2 partners indicated they were aware of the organizational strengthening guidebook, and a slightly larger proportion indicated that they had read it.
- Of those who had read the guidebook, average ratings for its helpfulness across two objectives were close to a 5 on a 1-7 scale. Partners found the guidebook slightly more helpful in providing

advice and guidance that contributed to their work than in identifying and attracting resources that strengthened their initiative.

- In interviews, several Round 2 partners mention the organizational strengthening guidebook as a helpful resource. When asked for improvements, one partner suggested to make it “more interactive,” a live document that facilitates connecting partners to resources, rather than a static guide.

#### SELECTED INTERVIEW EXCERPTS:

*“I think the dialogue with Co-Impact has been super timely and helpful on the organizational strengthening front...in terms of shared ideas, and just helping our most senior leaders think a little differently in terms of the framing of pre-existing policy priorities for different teams.” – Round 1 Partner*

*“One thing they should keep doing is organizational strengthening. Most funders pay lip service to this. They should not do away with this. They can focus less on programmatic aspect, and more on building organizational capacity. More of that would be great. Guide on organizational handbook was helpful.” – Round 2 Partner*

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#### Recommendations

- Given Co-Impact’s resources and growing portfolio, consider additional ways to tailor the provision of non-monetary supports in its engagements to partners’ rounds and level of experience with Co-Impact.
- Considering the low use of the organizational strengthening guidebook, review and reconsider the goals of this resource for partners.
- Consider if, and how, Co-Impact can support shortlisted Round 3 partners who did not advance to the design grant phase through formalized feedback or introductions to other potential sources of funding.

## ABOUT THE CENTER FOR EFFECTIVE PHILANTHROPY (CEP)



**Mission:** To provide data and create insight so philanthropic funders can better define, assess, and improve their effectiveness – and, as a result, their intended impact.

**Vision:** We seek a world in which pressing social needs are more effectively addressed. We believe improved performance of philanthropic funders can have a profoundly positive impact on nonprofit organizations and the people and communities they serve.

Although our work is about measuring results, providing useful data, and improving performance, our ultimate goal is improving lives. We believe this can only be achieved through a powerful combination of dispassionate analysis and passionate commitment to creating a better society.

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