

Partner and Applicant Feedback Report

Prepared for Co-Impact

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Executive Summary

Co-Impact's funded partners and declined applicants express gratitude and enthusiasm in describing their experiences with Co-Impact. They recognize Co-Impact's careful iteration, responsiveness to feedback, and clear commitment to its vision, which has resulted in a refined model that is working more effectively for its partners than in past years. Partners value Co-Impact's distinctive, collaborative approach, focus on outcomes, and potential for impact. This is underscored by deep appreciation for the partnership of the Co-Impact team, the helpful and unique design phase and resources, and a recognition that Co-Impact continues to have a pivotal opportunity to influence the philanthropic sector.

- **Approaches to creating change:** Partners value the approach that Co-Impact takes to create long-lasting impact on a large scale. They see Co-Impact as a thought leader in applying a systems change approach to creating impact, appreciate its focus on gender and intersectionality, and regard the organizational strengthening focus as a distinctive value. Partners hold mixed views on Co-Impact's Learning, Measurement, and Evaluation (LME) approach, with many praising the way that it has brought structure to their work, pushed their thinking, and deepened their focus on outcomes. Still, some partners have difficulties with its requirements and applicability to their own work, particularly WIL and Research partners.
- **Relationships with partners:** The quality of relationships maintained with partners continues to be a bright spot, with particularly positive perceptions of interactions with Co-Impact staff who are seen as highly knowledgeable facilitators and who ask thought-provoking questions of partners. While it is still too early to discern the effects of organizing in regional teams, this change is seen as a welcome development by partners. Communications overall with partners have improved, particularly for clarity of communication about Co-Impact's strategy and goals as well as its overall transparency. Among things that Co-Impact can continue to clarify is its position regarding providing follow-up funding to partners and ensuring that all partners (especially non-native English speakers) can access materials and resources in their preferred languages.
- **Application and reporting processes:** Co-Impact's funded partners and declined applicants continue to see its processes as very intensive, but clearer than in past years and well worth their effort. Co-Impact's processes bring rigor and reflection to partners' work, and partners appreciate the move to annual reporting requirements and the overall streamlining of Co-Impact's reporting process. The applicant population in this round of feedback is larger due to the Gender Fund Open Call. With this broader population, ratings on some measures are lower than in the past. This poses an opportunity to reflect on whether open calls are the right approach, and if so, how Co-Impact can best manage the expectations of applicants around the level of effort required and Co-Impact's selection criteria.
- **Design grant:** The design phase is seen as a unique and distinctive characteristic of Co-Impact's approach and as necessary for building and strengthening partner initiatives. Design workshops are highly appreciated for clarifying concepts and processes, although partners would like to have more opportunities to exchange with each other and more practical examples.
- **Non-monetary support:** Knowledge resources provided by Co-Impact (Handbook, Gender and Intersectionality guide, Organizational Strengthening and LME guidebooks) continue to be regarded as high quality and important references for partners. However, readership has considerably dropped from 2021, something that Co-Impact might want to address proactively. Connections to other partners and access to funding sources (through introductions or providing references) are highly appreciated and something that partners want Co-Impact to do more of.

Background and Methodology

Co-Impact has engaged the Center for Effective Philanthropy to gather feedback from its current funded partners and recently declined applicants. Perceptions from these groups are summarized in this report, and compared, where possible, to past CEP assessments in 2019 and 2021.

Interviews: Between February and April 2023, CEP surveyed and conducted interviews with Co-Impact’s partners and a small number of Gender Fund declined applicants. CEP conducted a total of 65 interviews with partners from 62 initiatives.

Surveys: In February and March 2023, CEP fielded a survey to 1166 partners and declined applicants and received a total of 363 responses.¹ The survey included several questions used in CEP’s Grantee Perception Report survey as well as some questions specific to Co-Impact’s resources, processes, and values. Survey results are referenced in this report; a more comprehensive set of survey results can be found in the interactive online report at <https://cep.surveymresults.org>.

Where data is available, partners’ and declined applicants’ responses are shown benchmarked to the responses of more than 50,000 grantees of over 350 funders in CEP’s grantee dataset and more than 5,000 declined applicants of over 50 funders in CEP’s declined applicant dataset. In some cases, partners’ ratings are also benchmarked against a smaller peer cohort of 15 funders. In these comparisons, ratings are referred to as “lower than typical,” “typical,” and “higher than typical.” This language relates directly to Co-Impact’s ratings in comparison to CEP’s overall dataset. “Lower than typical” refers to any rating that is in the bottom 35 percent of CEP’s comparative dataset, “typical” is defined as a rating between the 35th and 65th percentile, and “higher than typical” refers to a rating that is above the 65th percentile when compared to all funders in CEP’s dataset. Ratings described as “significantly” higher or lower reflect statistically significant differences at a p-value less than or equal to 0.1.

Ratings in the online report are shown for groups with fewer than eight survey respondents. In those cases, CEP grouped together partners in different rounds with guidance from the Co-Impact team.

Partner Type	Initiatives represented in interviews/ Total initiatives	Survey responses received/ Number of partners surveyed
Foundation Fund: Round 1	7/8	22/30
Foundation Fund: Round 2	5/5	Survey ratings for FF R1 and R2 are combined
Foundational Fund: Round 3	7/8	14/20
Gender Fund: Round 1	4/4	8/10
WIL and Research: Round 1	10/10	17/20
Gender Fund: Round 2	19/20	34/44
WIL and Research: Round 2	5/5	Survey ratings for GR, WIL, and Research R2 are combined
Declined Applicants: Gender Fund Round 2 DD	5/5	8/11

¹ All survey response rates are in line with or greater than CEP’s targets.

Data analysis: CEP reviewed Co-Impact’s partners’ interview and survey data at multiple levels: the experiences of partners across rounds, themes reflected in individual conversations, the prevalence of themes within each question and round, and changes from ratings and themes in CEP’s 2021 assessment.

Notes on confidentiality: CEP is committed to the confidentiality of the partners and applicants who shared information for this project. CEP does not share individual survey responses from any partners. CEP has shared direct quotes only when they were representative of broader themes and do not contain any information that it believes could identify any specific respondent. Many quotes have been edited and redacted for clarity and to preserve anonymity.

An Overall Positive Experience for Partners

CEP began each interview by asking Co-Impact’s partners to briefly describe their overall experience with Co-Impact. Overwhelmingly, interviewees portrayed their partnership with Co-Impact very positively: as “enlightening,” “constructive,” and “empowering.” Though, as in past years, interviewees also often describe their engagement as intense and occasionally challenging, the overarching sentiment was one of overwhelming gratitude and admiration. As one partner summarizes: “In one word, transformation.”

Across interviews, partners emphasized the following:

- Strong relationships with Co-Impact staff, whom they praise as “engaging,” “committed,” “smart,” and “collaborative.” Partners stressed the value of having a funder who truly listens to them, asks insightful questions, and is a thought partner across all aspects of their engagement.
- The value of applying Co-Impact’s systems change lens to their work and the benefits of engaging in a structured process that encourages “out of the box” thinking on how systems change can be achieved in their work. They point specifically to the value of Co-Impact’s inquisitive approach, making references to going through a “learning journey” together.
- Co-Impact’s flexibility, willingness to adjust its approach, openness, and responsiveness to their feedback. These attributes underscore the partnership between Co-Impact and its partners as well as Co-Impact’s dedication to strengthening their work together.

Differences in perceptions by partner type: On most themes across CEP’s surveys and interviews, partners across funding types and rounds were largely consistent in their feedback and perceptions, with one exception. Partners in the **WIL 1 and Research 1** groups provided significantly less positive ratings than other partners on many measures throughout CEP’s survey.

In CEP’s interviews, most partners in these two groups reported overall positive interactions with Co-Impact’s approach, communications, interactions, and processes. However, WIL 1 and Research 1 partners were much more likely than other partners to describe challenges with Co-Impact’s Learning, Measurement, and Evaluation (LME) framework: one-quarter of all difficulties mentioned by WIL 1 and Research 1 partners related to the relevance of LME to their work and difficulties with the clarity of the LME guidance provided to them.

SELECTED INTERVIEW EXCERPTS

“Our engagement is one that represents an equal partnership-decolonized, organic. We come with all the vulnerabilities and what we do/don’t know but feel comfortable in our knowing/understanding. [It has been an] interesting and engaging experience so far. A journey. Learning on both sides: they’re open to learning from us and having an iterative process.” – Gender Fund, Round 2

“More than any other investor that we’re working with, the efforts that Co-Impact are making around understanding power dynamics and trying to cede power and support partners to better own their power is something I have really valued, and I think that they’re doing it very earnestly.” – Foundational Fund, Round 1

“It is an example of how the donor-donee relationship should be.” – Foundational Fund, Round 2

“I would like to highlight how different Co-Impact is from everyone else. The engagements are deeper. There is a lot more listening in Co-Impact than there are in other organizations.” – Gender Fund, Round 2

“One of the things which really struck me was the inquisitiveness and the deep questions that were asked. I don’t think any funder has ever asked the level of detail and why is it that we are pursuing the avenues that we are pursuing.” – Foundational Fund, Round 3

Many Improvements in Partner Experience

In most cases, longer-term partners – those who have not recently begun their relationship with Co-Impact – recognize and applaud changes to Co-Impact’s approach in recent years. Most commonly, they mention an overall improvement in the clarity of Co-Impact’s communications about various aspects of its work and its processes.

Interviewees in Rounds 1 and 2 of the Foundational Fund have partnered with Co-Impact for several years. CEP asked these partners to describe any change in the past year that they would encourage Co-Impact to maintain in the future.² Specific changes noticed by partners include:

- Clearer and more structured processes,
- Greater responsiveness to partners’ feedback and willingness to adjust existing approaches,
- Less micromanagement and supervision from Co-Impact staff, with a greater focus on relationship-building with and awareness of funder-grantee power dynamics,
- A welcome change in the frequency of reporting from six-monthly to annual reports,
- A clearer focus on gender, and
- More diversity among Co-Impact staff.

² In interviews, 35 different partners have mentioned at least in one instance (61 mentions overall) of a change in Co-Impact’s practices which has had an effect on their experience.

SELECTED INTERVIEW EXCERPTS:

“In terms of how they engage interpersonally, I think that they've changed a lot. The way that Co-Impact engages with us now is very different from how they engaged us in 2019. It's with a lot more respect and a lot more care. The other thing that has been a big shift is just around diversity. I recently attended an internal programs meeting, and it was a very diverse group of people from across the globe, mostly from developing countries, based across the world. That felt like a very big shift from the Co-Impact that I had engaged with several years ago, and I think an intentional one. That's been that's been really nice to see.” – Foundational Fund, Round 1

“It's really been a joy to see how [their] vision has come to life. The steps that Co-Impact has taken to learn and grow since we were part of their initial cohort is something I've watched from afar with admiration.” – Foundational Fund, Round 1

“It's evolved, quite a bit. We were one of the first cohort of recipients to Co-Impact. Co-Impact was relatively small, nascent, and agile in terms of they were really trying to figure out what they should do... It feels like Co-Impact became much more organized and structured in the way they engage. At the same time, it probably evolved their thinking about how they create systems change, and the priorities they have.... The organization feels like it's maturing.” – Foundational Fund, Round 1

Highly Valued Approaches to Change

As in past assessments, partners highlight Co-Impact's ambitious focus on systems change and gender equality. In this most recent set of interviews, two other themes emerged when CEP asked about Co-Impact's distinctive approach: its commitment to strengthening its partners' organizations and its structured, yet flexible, approach to Learning, Measurement, and Evaluation. As one Foundational Fund Round 2 partner states: “There's a strong emphasis on data evaluation, the voice of the people on the frontline, and gender equity, and a healthy respect for the organizations that they've given money to after all that vetting, that they know what they're doing and [have] freedom to make decisions.”

Systems Change Vision

Co-Impact's emphasis on and expertise in systems change remains its most distinctive characteristic in the eyes of its partners.³ They praise the emphasis on thinking “big picture and detailed at the same time,” the focus on the Global South, the amount and duration of funding provided, and the encouragement for partners to think about systems change in a systematic way.

In interviews, when asked about which aspects in CI's communications were particularly clear, partners most often mentioned Co-Impact's systems change focus.⁴ The centrality of the systems change approach in Co-Impact's work comes through clearly, and many specifically mention the value of thinking about “the systems of today” and “the systems of tomorrow.”

³ In interviews, most partners made at least one positive comment regarding Co-Impact's approach to systems change: 51 partners made a positive comment about Co-Impact's systems change approach, for a total of 122 positive mentions of the approach.

⁴ 21 interviewees named Co-Impact's systems changes focus as an especially clear aspect of its communications, and 17 interviewees named specific aspects of the systems change approach as unclear.

Partners' survey ratings underscore this point. Overall, funded partners provide significantly more positive ratings than in 2021 for the extent that their engagement with Co-Impact and its processes contributed to:

- A bigger, more powerful vision for systems change that they are excited to pursue,
- A deeper understanding of what it will take to successfully execute against their systems change vision, and/or new ideas for how to do so most effectively,
- A useful perspective and approach to integrating learning, measurement and evaluation through your work towards systems/institutional change, and
- A new or improved systems change concept or plan that they have already used to seek funding from other sources.

Suggestion for Additional Clarifications and Some Modifications

Still, some partners continue to experience challenges with aspects of Co-Impact's guidance on achieving systems change.⁵ These include elements of Co-Impact's recommended approaches, for instance, for partners to work with government and visible power in countries where these relationships are difficult to access and maintain. Similarly, some partners note that political contexts in their countries limit possible actions available to them. A few remark on the perceived exclusion of certain methods – such as service delivery or research – from the systems change approach, where partners feel that these approaches are still needed. Others raise questions about whether the scale that is sought is too ambitious in relation to the resources available and whether partners' funded work can be sustained over time.

Additionally, certain aspects of Co-Impact's systems change vision remain unclear to some partners. As in past years, they seek more clarity on the definition of the impact that Co-Impact expects organizations to achieve, along with issues around scale – for instance, the number of people impacted by their interventions – as well as the “fuzziness” of certain terms for those struggling with “systems change language.” In the words of one Foundational Fund Round 1 partner, “They have a ‘we’ll know it when we see it’ perspective to systems change, which is very frustrating when you’re trying to meet the demand of a funder.”

As in previous years, some partners suggested ways that Co-Impact's systems change approach could be modified to better fit their goals and contexts, including:⁶

- Greater flexibility and nuance in defining systems change that takes into account different contexts. As one Gender Fund Round 2 partner mentioned, it is important to consider the “intrinsic link between the antiracist struggle and other causes such as poverty and gender.” Two other partners also suggested that Co-Impact should include a specific line of work on climate change resilience and adaptation.
- Guaranteeing more continuous funding for systems change initiatives to be successful and sustainable – either by Co-Impact themselves or by facilitating access to funding from other sources.
- Promoting systems change thinking among other funders in the philanthropic sector.

⁵ 38 interviewees shared challenges with the systems change approach, mentioning the theme 59 times.

⁶ 16 interviewees suggested adjustments to Co-Impact's systems change approach, for a total of 20 suggestions.

SELECTED INTERVIEW EXCERPTS

“The thing that has always been distinctive is that emphasis around system change. That view that you’re not funding a project, per se, but you’re trying to fund something that you see has a ripple impact, or line of sight to doing something broader and bigger than that, [...] It’s got to be a catalytic investment in a way that drives that. I think that that’s quite unusual.” – Foundational Fund, Round 1

“[Co-Impact should focus on] creating that system change mindset in other philanthropists.” – Foundational Fund, Round 2

“Systems change was something that they really clearly articulated in their handbook and through their interactions with us. We had maybe a little different understanding of systems change before this, but it’s been clarified a lot...as we interact with them. But now, we have arrived at an understanding of gender and systems change.” – Gender Fund, Round 1

“[I wonder] how can organizations which do not have a systems change lens, or organizations that want to have a system change lens [...], but the kind of systems change that Co-Impact talks about, the kind of language that they speak, I don’t think that’s universal. So, [...], so how can they make the language of systems change simple enough so that somebody doesn’t require consultant support.” – Foundational Fund, Round 3

“The system change approach wasn’t very clear. When we were going from the concept note to the detailed proposal, and we were to expand on that, after some more interaction with the Co-Impact team, I still don’t think that we had increased clarity on the system change approach. Maybe that’s the stage at which there could be some orientation to the approach, towards some better fleshed-out proposal, because I think we fleshed out our original idea without much further understanding about what scope Co-Impact was looking at.” – Gender Fund, Round 2

Important Focus on Gender Equality and Intersectionality

In addition to a focus on systems change, Co-Impact’s focus on gender equality and intersectionality is seen by partners as a valuable lens in their work.⁷ Underscoring Co-Impact’s intentionality, one Gender Fund Round 1 partner notes, “Our work was directly on gender, but for any other organizations who are working on, let’s say, climate change or economic empowerment, the push with gender is [unique]. A lot of people give money for work with women and girls, but not everybody gives money to push the gender agenda across [issues].”

Particular highlights of Co-Impact’s approach include an increased, specific, and intentional focus on gender, an explicit commitment to making a difference for women, and a focus on promoting women’s leadership. Partners also appreciate Co-Impact’s willingness to provide examples of successful actions taken to promote gender equality and to incentivize organizations that previously did not have a specific gender focus to apply a gender lens in their work.

Only a few partners raised questions or challenges with Co-Impact’s gender lens, including their own struggles to newly integrate gender and intersectionality in their work, some lack of clarity around the concept of women’s leadership, and questions about ways in which Co-Impact enables advocacy for LGBTQ+ rights.⁸ For instance, one partner asks for Co-Impact to add their voices to international calls

⁷ 39 interviewees provided a total of 60 positive comments about Co-Impact’s gender focus.

⁸ 11 interviewees noted specific questions or challenges with Co-Impact’s gender focus.

against the LGBTQ+ and human rights backlash in East Africa; others suggest greater work with men and boys using a gender lens.

SELECTED INTERVIEW EXCERPTS

“The focus on gender was something that was like a little bit of a whisper when we first started working with them. That has become foundational to their priorities and their areas of investment in a really big way over the past few years.” – Foundational Fund, Round 1

“They gave us so many examples of how things could happen at the system level when they came to visit us. [Beforehand, we felt that] gender-related things are nice, and we should do it, but they’re always at the high level. So, they made us really see, conceptually, operationally, by giving solid examples and material. That improved my conviction to do it. I was able to visualize, from their examples of the changes we could make, so that we don’t have to keep [gender equality] as a lofty high, desirable thing, but actually do it into day-to-day practices.” – Foundational Fund, Round 2

“Given the fact that Co-Impact is focusing on gender, [our project] hit certain metrics that Co-Impact is interested in. I would say that they are more open than some other funders to something that may not seem very mainstream. It’s a little different, it’s a little more challenging. We struggled a little bit when we were putting the proposal, saying look, ‘Is this too ambitious? Is it too abstract? It will be difficult to implement, is that going to scare off potential funders?’ With Co-Impact, clearly not.” – Gender Fund, WIL 1 / Research 1

Valued Organizational Strengthening Support

In CEP’s survey, funded partners rate Co-Impact significantly higher than in 2021 when asked about the impact that it is having on their organizations. In interviews, they praise Co-Impact’s focus on providing their organizations with the capacity supports – financial and otherwise – needed to successfully carry out their work.⁹

In particular, partners appreciate the opportunity to reflect on their capacity, including aspects of human resources and technological capacities for scaling their work, as well as building long-term plans and ensuring sustainability. Co-Impact’s unrestricted support provides the flexibility they need for organizational strengthening and enables Co-Impact to invest in partners’ organizational capacity, while at the same time respecting their organizational culture and priorities.

Echoing themes raised by others, partners of one Gender Fund Round 1 initiative characterize Co-Impact’s process as “invigorating, insightful, and a huge learning experience” and “a real journey of self-discovery,” describing Co-Impact as “a donor ... [that] gives you the freedom to really think big and think very strategically, but also provides gentle nudges so that you stay within your own vision and your own expertise, but also dare to dream beyond that.”

To further strengthen their organizations and ensure the sustainability of their current work, partners suggest that Co-Impact facilitate more connections to other funding sources, connect partners and initiatives to one another to enable mutual learning, and provide even more advice and support for capacity building.

⁹ This is mentioned by 32 partners in their interviews.

SELECTED INTERVIEW EXCERPTS

“One thing I didn’t appreciate at the time was a focus on organizational strengthening... [I have not] come across another funder that places so much emphasis on organizational strengthening. We’ve benefited a lot as an organization going through a series of reflections and exercises. I think it’s the first time we as an organization actually created the spaces to have deep engagement with all staff, and with our board members, as we developed and got to the tail end of the of the strategy.” – Foundational Fund, Round 3

“If it wasn’t for Co-Impact, we wouldn’t have now a five-year plan.” – Foundational Fund, Round 3

“It would have been helpful to have some additional connections that they could have made with consultants or groups that focus on [our area], because part of the problem is, I think we’re finding that we don’t always know what we don’t know.” – Gender Fund, WIL 1 / Research 1

Rigorous Learning, Measurement, and Evaluation Approach

Co-Impact’s approach to Learning, Monitoring, and Evaluation (LME) is another hallmark of its engagement with partners, though this aspect of Co-Impact’s work receives more mixed feedback than other Co-Impact aspects of its approach. Partners acknowledge the structure and rigor of the LME approach while sharing challenges with its demanding requirements and applicability to their work.¹⁰

The LME approach is especially valuable in helping to clarify Co-Impact’s values and expectations and to push partners’ thinking about how to understand the effects of their work. Partners appreciate that Co-Impact emphasizes learning and adaptation, noting that the LME strategy is flexible along the way. Many partners highlight Co-Impact’s three levels of outcomes – people, systems, and organizations – and note that a focus on these outcomes, rather than on outputs, has shifted their thinking about the possibilities for impact in their work.

Still, almost all of the partners that recognize challenges with the LME approach mention difficulties in understanding it when it was initially shared with them, and several (n=7) are unclear about its relevance to their own work and fields. A few noted concerns about the extent to which the LME approach is valid for research projects or advocacy work. Partners suggest providing training and capacity building on the LME earlier in the engagement, providing more clarity and examples – especially from other partners – as well as spaces for exchange between partners on this issue, and modifying approaches to enable greater applicability to partners’ own contexts.

As one partner describes, “In the LME plan, I was not clear on what they wanted, and eventually they provided a little bit more detailed guidance. I think their adherence to the goal of being really flexible, which I appreciate, was so much so that at times I was floundering a little to create an LME plan because they didn’t exactly know what they wanted. Once we got the guidance, it was easier for me to actually provide what they needed.”

¹⁰ In interviews, 18 partners mentioning positive aspects of the LME approach, and a similar number – 17 – describe challenges with their LME requirements. Nine partners suggested improvements to the LME approach.

SELECTED INTERVIEW EXCERPTS

“We are used to [doing] monitoring and evaluation, but their incorporation of learning, [...] is very important to us. And I think [we will incorporate it] in every other project we have, we will incorporate it into our whole organization. That's what we'll be using now.” – Gender Fund, Round 2

“The LME dimension is a new kind of art or science which is coming about in systems change. What was not clear to me is when we know that we are working with system level changes, the kind of a measurement and evaluation is very different from a ground-level, people-level change, like how many trees have been planted, how much carbon was captured, all things which will happen because of the result of the system change. What we should be monitoring is the change in the system. So what was unclear to me was, why do we still have to give metrics of local level outcomes and outputs, whereas the metric should be focused solely on the system level?... If we could have had a few more sessions of cross exchange of how people are navigating LME, I think even now we will benefit.” – Foundational Fund, Round 2

“We still found the LME quite a challenge. It took several iterations in our case to get it right. It's the expectation that it is very, very detailed. In the end, we did manage to do the detailing, which was helpful. All these things force you to think more and more deeply. [But it] can be irritating, the sense that it's bookkeeping. But, there were certain things, to the LME, that became much clearer...and have been helpful in how we have proceeded along with the project.” – Gender Fund, WIL 1 / Research 1

“They were very clear in terms of how they want the projects to be driven. They were very clear in terms of the specific outcomes that the project should target, which for us, were always reiterated when we met with them. This has to do with this system level outcome. At that level, you're looking at understanding the issue, understanding the drivers of the issue, understanding the need of the drivers of the issues, so that you can leverage on those needs, and begin to engage with them. And that will have caused the change that you want to see.” – Gender Fund, Round 2

“The way we work and the things we work on simply do not fit into that sort of framework. Sometimes when you're trying to fit a square peg into a round hole, it does seem unclear, whereas when we eventually interacted on what we ended up doing, it was much more clear. And then it was still about defining impact in specific ways, but it was like, at this level, like how will this impact the field? How will this impact people at a local level, how will this impact your organization? Those were the things we needed to actually think about and explain, and that was much more helpful than that original proposal call that went out.” – Gender Fund, WIL 2 / Research 2

Recommendations – Creating Change

- Continue efforts to clarify key concepts and simplify the language used to communicate with partners about the systems change approach, and to a lesser extent regarding the focus on gender and intersectionality.
- Together with partners, continue exploring the implications of applying a systems change approach in different contexts, issues areas, and types of intervention. Co-Impact might consider providing more specific guidance and recommendations for partners working in adverse political contexts. As

in 2021, continue to build a base of examples from partners from different contexts that can be shared for mutual learning and inspiration.

- Similarly, build a base of real-life examples for the useful application of the LME approach and framework.
- Regarding the LME approach, consider holding conversations and/or trainings earlier in the engagement with partners that focus on the value of this approach in guiding organizational adaptation and improvement.
- Communicate more clearly with partners about the need for continuous funding of their initiatives for working on systemic change and the potential role of Co-Impact in helping them raise that funding. Ensure that Co-Impact’s position on providing (or not providing) continued funding to partners is clearly communicated and expectations with partners are managed.
- Clarify the role of Co-Impact in connecting partners and facilitating access to other donors, and the extent of this support (from simple introductions to providing references).
- Consider a more proactive ‘advocacy’ role within philanthropic sector to promote systems change thinking and approaches, for example through strategic participation in grantmaking fora and conferences.
- Create more spaces for learning and exchange among partners, by making direct connections, but also by facilitating more opportunities for collective learning and sharing.

Relationships with Partners Continue to be a Key Strength

The relationships forged between Co-Impact’s staff and partners – an established strength in past assessments – continue to be a bright spot in the experiences of most partners.

More than any other strength, partners name their positive interactions with Co-Impact’s team as an important component of their experience. In fact, all interviewees mentioned at least one positive aspect regarding their interactions with staff.¹¹ Consistent with past years, partners appreciate the Co-Impact team’s efforts to foster collaboration and connection and build a sense of partnership in their work together. As one partner notes, “They roll up their sleeves to help you improve.” Others praise their Co-Impact contacts for encouraging openness about challenges, “believing in [their] project,” and “bringing learning from across the globe” to improve their work.

Reflecting themes shared in partner interviews, partners’ survey responses show meaningful improvements in their relationships with Co-Impact staff. On average, partners overall rate significantly more positively for their comfort approaching Co-Impact if a problem arises; their 2023 ratings for this measure place Co-Impact in line with the typical funder in CEP’s dataset and Co-Impact’s peer cohort. In interviews, nearly all partners noted that there were no off-limits topics in their conversations with Co-Impact; indeed, one partner stated that “sometimes we have a feeling we are sharing too much.”

¹¹ In total, interviewees gave 230 overall positive mentions of their interactions with Co-Impact staff. This was by far the most common theme across interviews.

In addition, **Foundational Fund Round 1 and Round 2 partners** express appreciation for the consistency – or improvement – of relationships over time. As one Foundational Fund Round 1 partner shared, “They had a reputation of the early stages of being high maintenance. That reputation has kind of improved, I would say, but I think they were also kind of a startup at that point. As a startup, you have to make sure that you’re on things and your initial investments are going to work out well... Over time, they’ve [come to] trust us, so the intensity of the ‘supervision’ has reduced.... The level of engagement and potential to cross the line and ‘come into the kitchen’ had tended to be higher on the Co-Impact side, but I think that they’ve managed that over time.”

Underscoring these comments, 2023 survey ratings from partners in Foundational Fund Round 1 and 2 are nearly universally more positive than ratings from those groups of partners in 2021. Notable increases include partners’ perceptions of approachability, transparency, and alignment with Co-Impact’s stated practices and standards.¹²

SELECTED INTERVIEW EXCERPTS

“[Our contact] has been very intentional in trying to solicit and incorporate feedback to make sure that the way that we are coordinating works for everybody to the best of our ability, and a big point for us had been clarifying where [Co-Impact is] simply providing feedback, because [they] want to make sure that we have it to bear in mind, versus things that [they’re] requiring a response on. That distinction has been really useful, because previously at the get-go of our engagement we’d receive feedback like, ‘Look, I just want to share this so that you can consider it,’ and we were treating it as things that we needed to do itemized responses to, and that was a bit more cumbersome than our team would have preferred. And I think that has improved a lot.” – **Foundational Fund, Round 1**

“It was pretty open, transparent, very candid. On both sides, it was very good. They communicated very clearly what is working well, what is not working, and especially also appreciating the entire efforts of the organization and [giving] us clear feedback. Typically, in [our county’s] context, with other philanthropists, you usually have to cover your vulnerabilities and you only talk about your positive points. With Co-Impact it was different. They wanted to understand what you are really grappling with, what are your troubles that you are facing.” – **Foundational Fund, Round 2**

“From my perspective, the direction of your work and of your grant may seem very heavily influenced by the person you are dealing with.” – **Foundational Fund, Round 3**

“With [our contact], it felt like [they] really were aware through and through about the power dynamic that plays between funder and receiver or organization. When you’re asking so many questions, you are, in some sense, putting pressure on the other side and the pressure of being evaluated. [Our contact] will try with all [their] might to make us feel, ‘you’re a team here, you’re trying to work this out, we’re not trying to necessarily critically evaluate all the time.’ That thoughtfulness was really very distinctive.” – **Foundational Fund, Round 3**

Increased Local Presence

In 2021, a key theme in CEP’s assessment was a desire from partners that Co-Impact should strengthen its understanding of the contexts and challenges in their local communities. In CEP’s 2021 survey,

¹² See Appendix A for a full list of statistically significant changes in survey ratings over time.

partners ratings of Co-Impact were in the bottom 25 percent of CEP’s dataset on the question of how well Co-Impact understands the social, cultural or socioeconomic factors that affect their work.

This year, partners’ ratings on this measure have improved significantly, placing Co-Impact in the top 30 percent of CEP’s overall dataset.¹³ Additionally, partners agree more strongly than in 2021 that the Co-Impact team “honors the importance of local context in my initiative’s work” and “reflects global lived experiences and values.”

In recent years, Co-Impact has opened local offices in the regions where it works. In interviews, CEP asked all Foundational Fund partners and Gender Fund Round 1 partners whether they have noticed the change to organizing in regional teams and to share their reflections on this change. Overall, these partners appreciate Co-Impact’s desire to increase its local presence and understanding of local contexts, though several noted challenges with contact changes in regional offices.¹⁴ It may be too soon to see the effects of this change, as partners note a need for more time, and stable staffing in their regions, to build relationships and expertise locally.

Relatedly, several partners noted that Co-Impact could continue making its materials accessible for non-native English speakers.¹⁵ They suggest that Co-Impact ensure that simultaneous translation is available for all meetings, that there is regional staff that speaks their language and understands their context, and that materials (for instance, slides in workshops or guidelines) are also translated. Importantly, in their survey responses, partners in Latin America provided significantly lower ratings than partners in other regions – rating more than a point lower, on a 1-7 scale – for their agreement that materials provided by Co-Impact in its application process were accessible (e.g., in their native or preferred language).

Differences in ratings by partners’ region: Across several survey measures, partners’ ratings vary by their region. In particular, **partners in India** (42 survey respondents) rate more positively than those in other regions for some aspects of Co-Impact’s interactions and communications, their agreement that Co-Impact lives up to many of its stated values and practices, and the extent to which their engagement with Co-Impact has contributed to their work.

SELECTED INTERVIEW EXCERPTS

“When we were first selected, there were, to my knowledge, no members of Co-Impact that had been working in [our] region... and now there are [several] individuals that work directly with us and have a deep understanding of the region. So this was a blind spot in an organization that is focused on the Global South, and is interested in supplying and structuring the initiatives in this overall region. [There was a gap], but they did it amazingly, because they hired incredible individuals.” – Gender Fund Round 1

¹³ Ratings from WIL Round 1 and Research Round 1 partners are an exception: those groups rate Co-Impact below typical. CEP asked the same question of declined applicants; their ratings and remain typical, and similar to 2021.

¹⁴ Out of 22 interviewees, 12 indicated that they have observed this change, of which 6 were positive and 6 mixed – mostly related to the turnover in the India office and not yet having established a close relationship with their regional contact.

¹⁵ Challenges with language were mentioned by 11 interviewees.

“The person in India had to leave, so there has not been really a change - the person that is here is more about sourcing new partners. We still have our communications with the person in NY. But it is welcome that they are organizing with regional teams.” – Foundational Fund Round 2

“It's still very, very new... [we need] the kind of critical support - and I don't just mean support in terms of 'we respond to your emails, we schedule meetings, or we're not rescheduling it 10 times' - but also the responsiveness and willingness to listen to some of our field assessments, and what needs to be done.” – Gender Fund, WIL 1 / Research 1

“We have a very good professional relationship with the folks that are here in [our country], helping us. We were checking with them, what we would they like to know about the initiative, if we will have something to share.” – Foundational Fund, Round 3

“Of course, there is a limitation [in Co-Impact] being a foreign funder because India has, in last probably two, three years, a huge issue around foreign funding and FCRA regulations.... Suppose something happens with the designation of foreign funding, right? It's absolutely very unpredictable... Each and every grantee organization in India, this is at the top of their mind. We are also mindful that [Co-Impact is] also talking about it. I think we can [talk to them about it,] but then we are also mindful that they are also a foreign funding organization.” – Foundational Fund, Round 2

Intra-Partnership Dynamics

Some difficulties with managing relationships between coalition partners – a challenge often mentioned in partners' 2021 interviews – were mentioned, in varying degrees, by thirteen interviewees in 2023. A few partners describe coordination challenges, noting, for example, that “the collaborative set up/coalition set up of the grant hasn't been the easiest mechanism,” and that it can be an “exhausting” process to bring together all the different perspectives and ensuring ownership by all parties. Another issue raised by interviewees is the effort involved in strengthening the organizational structures and general capacity of some of the partners, or the effort for collating data and bringing different frameworks together for the LME plan for reporting to Co-Impact.

SELECTED INTERVIEW EXCERPTS

“There's a big part of the [reporting] exercise that is just gathering information from our partners, which takes a lot of time.” – Foundational Fund, Round 2

“As they [Co-Impact] think of their model, they do need to think of whether they want to go with one organization, or they want to go with a coalition. One big implication is I think it affects the impact that we can have, which should be a driving factor - the impact on beneficiaries. It also impacts collaboration across organizations and our ability to improve each other.... These extra layers means that the hours, the cost of doing this is really heavy.... It took more than a year of getting together and preparing things to reach the point where they said they were interested, and six months to develop their proposal, and then many months again... three months to give a grant to [our coalition partner] ...So this is nine months where we're floating, and we're having no revenue come in. And yet we're doing the work.” – Foundational Fund, Round 2

“Working with local partners who have different priorities than a researcher which is just part of working in a collaborative like this. Implementation partners are focused on doing the program and can

sometimes lose sight of bigger picture, where researchers can be focused on the design/rigidity. Don't quite know what the research will end up being but the spirit has been mutual consent and down the road together, so definitely some risk involved." – **Gender Fund, WIL 2 / Research 2**

Stronger, Clearer Communications Than in The Past

In interviews and surveys, Co-Impact's partners indicate that its communications have become simpler and clearer over time. In fact, partners' survey ratings have increased significantly from their 2021 levels on the question of how clearly Co-Impact communicated its goals and strategies to them. Partners' ratings for Co-Impact's transparency with their organizations have also significantly increased and now fall in the top ten percent of CEP's overall dataset and near the top of Co-Impact's peer cohort.

Partners notice and appreciate recent changes in the clarity of Co-Impact's communications, primarily naming improvements in their understanding of Co-Impact's systems change methodology.¹⁶ They state that Co-Impact's staff, workshops, and published guidance have been helpful in building this clarity. Partners in one Gender Fund Round 2 initiative shared that while they were initially "unsure of what Co-Impact wanted from them," staff's explanations coupled with Co-Impact's published guidelines and step-by-step instructions have been helpful for building their understanding how to approach their systems change plans.

In interviews, common suggestions about how Co-Impact could further improve its communications included:

- To be clearer about expectations. Partners express that they feel that Co-Impact is sometimes deliberately vague regarding what they expect to see from a partner, (for instance, when iterating the design of a proposal) which can be unsettling. They ask for more straightforward communications in this respect.
- To be more transparent about selection criteria, as well as other aspects regarding processes, such as timelines or expected number of interviews.
- To provide more clarity on Co-Impact's longer-term strategies, especially regarding plans to support partners beyond the grant period.
- To be more proactive in highlighting partners' work in Co-Impact's external communications – for example, through Co-Impact's website.

SELECTED INTERVIEW EXCERPTS

"They were very clear in their communications with us from the beginning. They did not actually build our expectations unnecessarily. I think that they were actually able to deliver some very bad news in the kindest way possible because they knew that it is a long process. It infused some optimism alongside with some realistic advice to us in how to proceed and probably get to the end of the second stage adequately." – **Gender Fund, Round 2**

¹⁶ CEP asked this questions of partners in the following rounds: Foundational Funds 1 and 2, and Gender Fund Round 2 as well as WIL and Research partners. Of these 34 interviewees, 20 reported noticing improvements over time in how CI communicates and interacts with them.

“Co-Impact has stressed that they don't see themselves as being like other funders, and they certainly are not like other funders with whom we've dealt. And if anything, I find myself wishing for even more contact and support.” – Gender Fund, WIL 1 / Research 1

“A lot of the conversations are very shrouded at times. Can't you just tell me what you really want to tell me? A lot of what we thought was discretionary or maybe ideas for us to think about was actually more an instruction guide. I much prefer straight out - when people communicate what needs to be looked at, what they didn't like, what they didn't agree with, what they wanted. That would have moved us forward and taken a lot of the pain out of the process.” – Foundational Fund, Round 3

“Given that they already did a round of concept notes and then shortlisting, it would have been good if we had a conversation between the concept note being developed into a much larger proposal, because there was no indication as to why the selection was made. If we had that it would have given us some direction as to what bits to elaborate on.” – Gender Fund, Round 2

“[...] We didn't feature in the annual report last year, and I think that wasn't necessarily on purpose, but given where we are in our funding pipeline it would have been actually a very strategic moment for us, to be mentioned and acknowledged by them. We don't have any real direct relationship or engagement with their communications team.” – Foundational Fund, Round 1

Recommendations – Partner Relationships

- Celebrate the positive feedback received on the quality of the relationships maintained with partners, especially through their interactions with Co-Impact staff and ensure that staff around the world have opportunities to reflect and learn together about the different adaptive approaches they use to build strong partner relationships. (In other words, ensure opportunities to make any implicit decisions and approaches more explicit.)
- Maintain the roll-out and increasing presence of Co-Impact staff in the regions where it works. Ensure that staff hired have a good understanding of partners' contexts and, whenever feasible, can communicate with partners in their native language.
- Continue making an effort for materials to be translated the languages in which partners work and to ensure simultaneous translation for all meetings with partners who are not comfortable in English. When in a workshop or webinar, consider the translation of all materials used, such as slides and visualizations.
- Maintain open conversations with partners about working through coalition dynamics, potentially offering some cross learning through lessons learned from different initiatives.
- Where appropriate, consider being more direct language when communicating expectations with partners, even when there might be a fear of coming out as prescriptive.
- Consider more ways to use Co-Impact's external communications vehicles – such as the website, annual report, and social media – to give more visibility to partners and their work.

Improved Partner Experience with Application and Reporting

In interviews and through their survey ratings, partners hold favorable views of Co-Impact's processes, highlight improvements, and suggest that Co-Impact continue to streamline and clarify its requirements.

Co-Impact's partners acknowledge its thorough application and reporting processes are crucial in helping them sharpen their ideas and think critically about their impact, while still noting that these processes are "very lengthy" and that Co-Impact "asks for a lot." Broadly, partners appreciate the rigor of these processes, but suggest that Co-Impact could streamline the requirements and timelines, as well as include greater specificity in the application requirements.

On average, Co-Impact's most recent partners – those receiving funding from Round 2 of the Gender Fund, WIL, and Research – agree more strongly than partners in 2021 that the effort required by their engagement with Co-Impact has been appropriate, given the odds of receiving funding. Compared to the ratings of Foundational Fund Round 2 and 3 partners in 2021, this is a statistically significant increase.

Partners' Improved Perceptions of Application Process

In surveys, CEP asked partners in Round 2 of the Gender Fund, WIL, and Research (as well as declined applicants, which are discussed in a later section) a series of questions about Co-Impact's application process. On most measures, 2023 partners' ratings are similar to 2021 ratings from Co-Impact's Foundational Fund Round 3 partners. Certain aspects of Co-Impact's application process show improvement over time: on average, partners agree more strongly than in 2021 that Co-Impact is clear and transparent about how it approaches funding decisions and that it avoids unnecessary requests, reports and/or visits.

In interviews, partners often highlighted positive experiences with Co-impact's application process.¹⁷ They express appreciation for the opportunity to refine their approach through "simple, very clear, precise questions" that encouraged "rigorous self-assessment" in partnership with Co-Impact staff, for the guidance provided through Co-Impact's written materials and resources, and the ways in which Co-Impact's process "pushed us out of our comfort zone," motivating large-scale, long-term thinking about systems change.

Even in light of these positive comments, many partners describe challenges with their application – most often related to its length, intensity, and their own understanding of exactly what was expected of them. These comments mirror critiques identified in past assessments. One Foundational Fund Round 3 partner noted, "The level of intensity that Co-Impact wanted to give and wants [us] to give...they could have taken their foot off us a little bit." Partners suggest that Co-Impact could alleviate some of their challenges by more clearly communicating its expectations around some of the "brass tacks" of the application, budget, and timeline in a more structured way and earlier in the process.

The flexible nature of Co-Impact's process can lead, in some instances, to ambiguity and uncertainty. Expressing this, one Foundational Fund Round 3 partner shared, "[Co-Impact] doesn't like to be prescriptive and tell people, 'Here's the template you should use.' But [our program officer told us] 'By the way, here's the template that I wished you had used, and it should have been capped at 20 pages.' I was like, Are you kidding me? You actually have a proposal template that you just didn't want to share, because you didn't want to box us in?"

¹⁷ In interviews, CEP asked questions about Co-Impact's application process to partners in Round 3 of the Foundational Fund, Rounds 1 and 2 of the Gender Fund, WIL and Research, Declined Round 2 Gender Fund applicants who had completed Co-Impact's due diligence process.

Continued Perceptions of Pressure

Perhaps related to the intensity of Co-Impact's application process, partners reported slightly higher levels of pressure than in 2021 – and greater than grantees of nearly all other funders in CEP's dataset – to modify their priorities in order to create a grant proposal likely to receive funding.

In interviews, CEP asked partners if they felt any pressure from Co-Impact to make changes that were not in line with their own organization's interests and priorities. Of the 38 grant partners who responded to this question, the majority – 30 – denied feeling such pressure. Three partners told CEP that yes, they did feel pressure from Co-Impact to make such changes, and five partners shared mixed feelings on the matter. One noted, "I don't know whether there was pressure or whether it was just my colleagues interpreting how to be responsive to Co-Impact's priorities." Another partner noted, "Of course, we're going to be lying if we say there is no pressure, but also on the other hand, instead of seeing it as pressure, it's more like Co-Impact is shaking our comfort zone. We've been doing this work for a long time, and it was pointed out to us that, 'Hey, what you're doing is great, but will it really provide a long-term solution?' So it forced us to think really hard...and out of the box, way beyond what our comfort zone is usually. So yes, it was hard, it was super challenging, it was kind of high pressure, actually. But also, we are currently fairly happy of where we are now."

SELECTED INTERVIEW EXCERPTS

"The template was very clear, in terms of the proposal saying, 'This is what we're looking for. This is the length.' Frankly, we could have gone on and on and on in terms of the amount of stuff we wanted to talk about. The guardrails were very, very clear. The questions were very clear in the proposal. It was a challenging proposal because of the subject matter and what we wanted to convey. But I think there were enough guardrails and there was enough clarity in what we needed to provide to Co-Impact." – **Gender Fund, WIL 1 / Research 1**

"Co-Impact really pushed us to stay within one system and kept questioning our hypotheses and saying, how will you do it? In some senses [they] helped us to simplify what we were setting out to do, and really understand what the key levers of that engagement." – **Gender Fund, Round 1**

"We were really comfortable with having this open conversation with [our contact] throughout that process. It was great. And if it hadn't worked out, it still would have been a fun process to have gone through." – **Gender Fund, WIL 2 / Research 2**

"The clarity of the framework. You do your problem analysis: What is your vision for the future? What is your strategy in between? That kind of framework is quite clear-cut, and it enables the thinking process. I thought the frameworks are very clear with Co-Impact....It led the [initiative partners] to think about different aspects of work, and I think that that was something that unified the [coalition], helped bring everyone together." – **Gender Fund, Round 2**

"The game changer was the systems change theory. We didn't write [the initial] proposal from that basis. We dealt with things like intersectionality, learning measurements, and women's leadership, but we really had to rethink the way in which we packaged it after we received feedback from them. During the application process, we had two meetings with [our contact] and they asked us questions and probed and helped us focus. I think that's when we really started to understand the process and the approach." – **Gender Fund, Round 2**

“From day one, it was challenging, just putting everything together and hoping for the best.... But at the same time, it stretched us to think deeply about what we wanted.” – Gender Fund, Round 2

“The prospectus document, they had given a guideline for that. The guideline is extremely detailed, extremely long. If there was a way in which you could have maybe a simpler way, for someone to guide us, a little simplified version initially, because it's a very detailed, very deep document. There is a certain language that system change is using. Understanding that language took us about six months. If there is a slightly simpler way that we can understand or that it can be explained, that then I think we'll be able to move faster.” – Foundational Fund, Round 3

“It is a high level of effort. Every prospectus literally brought the whole organization to a standstill. When we had to submit the prospectors, it was a good one month of writing.” – Foundational Fund, Round 2

Appreciation for Lighter Reporting Requirements

In interviews, CEP asked all Foundational Fund partners and partners in Round 1 of the Gender Fund, WIL, and Research several questions about Co-Impact's reporting process. Nearly all partners (12 of the 14 who shared that they had submitted their reports) shared positive feedback on the process and the level of effort required.

Aspects that these partners found particularly helpful or thought-provoking included the “chance to really reflect” and take stock of their progress and milestones. Partners also appreciated Co-Impact's “good questions” about their work, feel comfortable sharing what has not worked well, and are very thankful that Co-Impact has reduced frequency of reporting from every six months to annually.

Very few partners suggested changes to Co-Impact's reporting processes, and when pressed to suggest improvements, most named reducing the effort required to collect information from multiple teams and use specific formats.

SELECTED INTERVIEW EXCERPTS: FOUNDATIONAL FUND¹⁸

“To be honest, they're actually one of our least fussy reporting formats.”

“Their reporting is light. The questions they ask are things that make sense... how to think about the interventions, how to report, how to strategize, that's all very good, and has been good for us to have to do it. We do some version of that, but this has increased the level of rigor in our thinking about designing the intervention.”

“I like not having a template because it allowed us to structure around the goals from the report from the proposal and around the learning that we're doing and the thematic things that are cross cutting. I liked having the freedom to generate my own template, my own structure.”

Recommendations – Process

- Maintain internal momentum on efforts to streamline the application process, continuing to work to discern the most useful reflective components for partners and Co-Impact.

¹⁸ In the following excerpts, we do not specify the Foundational Fund round in order to protect the anonymity of the respondents.

- Be more explicit in the communication of selection criteria in the application process and in documentation.
- Clearly communicate about the steps and length of engagement early in the relationship with a potential partner by outlining the different steps in the process, intensity of the engagement (particularly the number of interviews to be held), and overall timelines.
- Consider proactively providing templates for application and reporting for partners that wish to use them, communicating clearly that their use is optional.

The Design Grant – Intense and Impactful

Co-Impact’s design phase remains a distinguishing feature of Co-Impact’s approach. Praised by partners as “amazing,” “fantastic,” “unique,” and “outstanding,” partners continue to appreciate the ways in which engaging with Co-Impact through this reflective process has shaped and informed their work. In the words of one Gender Fund Round 2 partner, “The approach Co-Impact has adopted to supporting partners involved in systems change is novel and is an important way for such organizations to re-think their strategies and analysis of the problems they want to contribute to solving. The webinars on various aspects are extremely important and must be continued even after the Design Workshops to ensure that participants’ understanding is deepened further.”

Nearly all partners shared that the design phase allowed them to rethink, revisit, and reflect upon their work, connect as a team, and build stronger relationships. One partner from the Foundational Fund Round 2 commented in the survey, “Co-Impact could think about promoting the Design Phase (without necessarily getting into the Full Grant Phase) as a separate initiative, as the process of reflection during the Design Phase is very rich in itself and could unlock the true potential of organizations.”

In the survey, Co-Impact partners found the following aspects of the design grant as most helpful:

- Providing direct support that significantly helped them advance their vision, analysis, modeling, planning and partnerships for the work,
- Conducting analyses of relevant systems and developing system-level outcomes, and
- Allowing for dedicated staff time to create a bigger and/or more rigorous vision of their future work.

Overall, partners also continue to suggest similar improvements in 2023 as in 2021. They note that the design phase requires a significant time commitment that has an impact on their ongoing work and commitments, and that not all organizations have the ability to pause their work in a similar way. The length of the design phase also makes the logistics of coordinating across and within partner organizations difficult as aspects of the work and planning are reconsidered. In the words of one partner from the Gender Fund Round 1, “The prospectus drove us crazy. We call it our master’s degree or doctorate. Internally, we made jokes because it was such a robust document. But I wouldn’t say it in a negative way. I think it was a reflection time. So, the reflection was driving us crazy, [...] it was part of the growing process. And it’s intense. But I feel like we had the resources to do it, we had the time to do it.”

While partners highlight their appreciation for Co-Impact’s compensation during the design phase, they acknowledged that not every organization would have the ability to complete the phase without hiring external consultants to help them—something that they note Co-Impact encouraged them to do. As one partner notes, “We didn’t hire an external consultant to draft a prospectus for us. We also know that’s

not Co-Impact's preferred way.... So, the financial resources [in the design grant] meant it could subsidize my time, but it took my leadership team's time. What suffered was our ability to do our work. Money doesn't replace that.... Maybe we should have been smarter and gotten a consultant to draw the strategy. We just really wanted to own it and believe it and drive it ourselves...but we took a lot of pain for that."

When asked in interviews about any aspects of Co-Impact's approach that are not clear, several partners – primarily in Round 2 of the Gender Fund – name specific aspects of the design phase. They mention confusion about expectations around using coaches, not knowing whether the initiative will be successful in receiving funding after the design phase, and uncertainty about how much they can adjust their initial proposal at the end of the design phase.

SELECTED INTERVIEW EXCERPTS

"The mere fact that they actually have a design phase is incredible. [...] Having the opportunity to listen and to work directly with field workers is of most value to us. We appreciate that it lasts a year, as this work requires time and Co-Impact are aware of this." – **Gender Fund, Round 2**

"Writing a prospectus like that, if you do not get the grant, then it is a major disappointment. I was wondering whether there could be a step between the final prospectus writing and getting the grant, if there could be some kind of indicators from Co-Impact that you are really getting there. I think that would help people significantly." – **Gender Fund, Round 1**

"It's not always obvious to funders that the time put towards putting together the prospectus, and the thinking that goes with that, actually costs money. It's such a thoughtful way to have that as part of the process." – **Foundational Fund, Round 3**

"When they came to us last year and they said, you're going to get money for the design phase, I was like, why would you need a full year to do design phase? I couldn't quite get my head around it. Don't you give us the money, we start and we implement? But after going to Kenya and going through the workshops, and reading all the material, it makes so much sense to actually have the spirit to design the project and to design the initiative. I've never experienced that before. It was almost an ideological shift in the way in which you think about things." – **Gender Fund, Round 2**

"For us as a team, it provided a lot of opportunity for us to engage with each other about applying what we learned from the different aspects of system change and then applying it. Before that, we had meetings, and we would write drafts and pass them around and have comments. But this was really the first time we really had the space to go in depth and be critical in a constructive way of what we were thinking and why we're thinking. Really supported us in refining what we want to do." – **Gender Fund, Round 2**

"The materials that we got from the design workshop, we kept on referring to them. Also, the whole idea around system-level outcomes and people's-level outcomes - this is that something that we were waking up to for the first time." – **Gender Fund, Round 1**

"[We appreciated] the introductions to other organizations. For us, we broadened our horizons a lot in terms of exposures, a full year of exposure to different thinking, different organizations. We met at least I think, 50 different potential partners just to understand their work." – **Gender Fund, Round 1**

Virtual Design Workshops – Helpful and Informative

In 2021, Co-Impact offered a series of virtual design workshops to partners. In interviews, partners who attended these workshops found them worth their time and effort. As one partner said, “We were all virtual, but the group work was fantastic!”¹⁹

Similar to the design phase overall, partners noted that having the time to revisit concepts, methods, and Co-Impact’s approach were especially helpful aspects of these workshops. Additionally, nine partners explicitly noted that the facilitators were excellent.

When asked for suggestions about how these workshops may be improved in the future, partners cited a desire for more connections with other organizations, a few mention language challenges, and some note logistical challenges across time zones.

Naivasha Design Workshop – Reflective and Meaningful

Continuing from the success of the South Africa Workshop in 2021, Co-Impact offered partners another in-person design workshop in Naivasha, Kenya in 2023. When asked in interviews, twenty-seven partners indicated that they were able to attend this workshop. When asked in the survey about the helpfulness of the workshop to support their initiatives to achieve lasting systems change, like in 2021, the average rating was extremely high: a 6.7 on a 1-7 scale. As in 2021, the design workshop itself was the highest rated among the other non-monetary offerings that Co-Impact provides, ahead of both the Conversation Series on Gender and the Workshops on Learning, Measurement, and Evaluation.

In interviews, all partners indicated that this workshop was worth their time and effort. Similar to 2021, partners continue to appreciate the opportunity to meet and connect informally with other partners and that the content of the workshop had a meaningful impact on them and how they think about their own work, organizations, and strategies. Partners also highlight that the workshop helped to build a level of familiarity and comfort with Co-Impact’s methodology and approach that was useful as they begin to deepen their relationships with Co-Impact. Of note, seven partners noted that simply creating the time as a team to come together and reflect was immensely valuable for their work. There was high praise for the facilitation and structure of the agenda that included a good balance between blocks dedicated to work and time for rest and reflection.

For future iterations, partners noted that the length of time felt “long” but was “useful,” and experienced a few of the language challenges that were also raised in relation to other aspects of work with Co-Impact. One partner suggested that some better documentation of workshop resources to take away would be helpful for future reference.

¹⁹ In 2023, CEP asked questions in interviews about both the virtual design workshop in July 2021 (Gender Fund Round 1 and Foundational Fund Round 3) as well as the in-person design workshop in Naivasha, Kenya in 2023 (Gender Fund Round 2).

SELECTED INTERVIEW EXCERPTS

“The value was at many levels. It was the connections among us for our own group. The opportunity to meet with others, just being able to bring all the other applicants in the same room, you learn and influence each other or each other's projects in powerful ways, just listening to what others are dealing with and are thinking about right next door to you. I found that really, really powerful.” – **Foundational Fund, Round 3**

“This was fantastic, because I think the whole structure was very, one is it was very interactive. The structure, the way they set up the whole thing, in terms of telling you what is the system of today that you have.... We replayed it back to our whole leadership team and the next level. We ran the same workshop over 20 internal people saying, 'that this is what we want to do in the design grant. This is how we want to think about system of today, tomorrow.' I think the design workshop was very good.” – **Gender Fund, Round 2**

“It was one of the most wonderful online workshops that we have ever attended. Not just in terms of content, but also facilitation and the way it was done. First of all, we got a lot of time to actually talk to each other, to hone our understanding of systems change. We got a lot of time to actually argue with each other to see what is going to actually work in there. Co-Impact really played a very silent facilitation role, they just let us go through the workshop and talk to each other and figure out the things by giving us the tools, but they didn't really push us to do this or do that. It was really the facilitation as well as the tools provided that helped us arrive at a final design idea.” – **Gender Fund, Round 1**

Recommendations – Design Grant

- Consider providing follow-up webinars for partners throughout the design phase, beyond the design workshops. In the workshops and webinars, build more time and opportunities for exchange and learning between different initiatives. Ensure that challenges for non-native English speakers are adequately addressed.
- Clarify the role of coaches for partners in the design phase, and unequivocally communicate that their engagement is optional, as well as the implications for partners choosing to (or not to) engage them. Similarly, reconsider the engagement and role of external consultants for the writing of the prospectus, especially for those initiatives that include grassroots organizations with limited capacity.
- Communicate clearly with partners the process and expectations for each step in the design phase: At which point can partners be certain to receive funding? What are the steps and timelines? How much are partners expected to rework their initial proposal or are they expected to (re)design their initiative from scratch?
- Recognizing the uniqueness and distinctive value of the design phase, document and share externally, especially with other funders, lessons learnt regarding the challenges and benefits of the approach.

Helpful Resources and Support Beyond Grantmaking

All recipients of CEP’s survey – partners and applicants alike – were asked if they were aware of several resources that Co-Impact has made available: its Handbook, its Organizational Strengthening Guidebook, and the LME Guidebook published by Co-Impact in 2021. CEP did not ask partners specifically about these resources in interviews, though several partners mentioned using the handbook or either guidebook. In those cases, partners emphasized the importance of “values alignment” in the handbook and “useful tools for working step-by-step” in the LME guidebook.

Beyond these resources, partners note a variety of ways that Co-Impact has been directly influential in their work beyond financial support.²⁰ When asked for examples, partners described that supportive interactions and feedback from their Co-Impact contact have pushed their thinking, helped them think from a systems perspective, particularly the at the levels of systems – people – organizations, helped them think through their approach to gender and intersectionality, and helped them secure other funding or connect them to other donors.²¹

Specific examples of Co-Impact’s support include:

- An introduction to a peer organization and support setting up a meeting,
- An introduction to another funder, who made a substantial grant to the organization. This partner noted that Co-Impact’s intense due diligence processes provided validation and trust to their new funder,
- Elevation of gender-focused work in the partner’s organization, which previously did not have a core gender focus,
- Public communications about the partner and their work.

Learning, Measurement and Evaluation Guidebook

Most partners – 90 percent – indicate that they were aware of the LME Guidebook, and 59 percent reported that they have read some or all of it. Some variation exists across partners, with WIL Round 1/Research Round 1 and Foundational Fund Round 3 partners being most likely to have read some or all of the guidebook, and Foundational Funds Rounds 1 and 2 as well as Gender Fund Round 1 partners being least likely.

Partners who have read the guidebook find it most helpful in aligning expectations around the three levels of outcomes, providing clarity about Co-Impact’s approach and perspective on LME, and providing information that has contributed to their work.

Partners in Rounds 1 and 2 of the Foundational Fund and Round 2 of Gender Fund, Research, and WIL generally found the guidebook more helpful in these aspects than partners in other rounds.

LME workshops and bilateral conversations on LME: CEP asked WIL and Research partners a series of questions about workshops organized by Co-Impact to develop partners’ LME plans, which were

²⁰ This question was asked of all Foundational Fund Partners, as well as Round 1 partners in Research, WIL, and the Gender Fund.

²¹ Specifically, 9 partners noted that CI pushed their thinking, 8 specified the increase in thinking from a systems perspective, 4 noted refinements to their gender and intersectionality approach, and 3 noted that CI helped them secure other funding or connect them to other donors.

followed by bilateral conversations on the topic. Seven WIL and Research interviewees reported attending these LME workshop and shared positive overall impressions, noting that they were “useful, especially in understanding Co-Impact's perspectives.” If anything, a few note that they would like Co-Impact to provide more examples of successful LME plans.

Likewise, those WIL and Research partners who had bilateral discussions on LME with Co-Impact staff found them to be valuable, helping them clarify concepts and iterate on their work. In the words of one partner, “We still found the LME quite a challenge. It took several iterations in our case to get it right.... All these things force you to think more and more deeply... There were certain things that became much clearer...and have been helpful in how we have proceeded along with the project.”

Organizational Strengthening Guidebook

Nearly two thirds of Co-Impact’s partners are aware of its guidebook on organizational strengthening (a similar proportion as in 2021), though a smaller proportion of partners indicate having read some or all of it (38 percent, compared to 47 percent in 2021).

Of those who had read the guidebook, their average ratings for its helpfulness across its objectives increased from their 2021 levels. In particular, partners’ ratings increased significantly for the extent that they find the guidebook helpful in providing advice and guidance that contributed to their work.

The Handbook

Co-Impact’s handbook continues to be a valued resource for partners that helps them to understand how Co-Impact works, partners with others, and what expectations Co-Impact has for its current and prospective partners.

However, a smaller proportion of partners than in 2021 report having read some or all of the handbook: 66 percent, down from 86 percent in 2021.²² Ratings for the handbook’s helpfulness are at similar levels for both partners and applicants compared to 2021, and partners and applicants both find the handbook most helpful in providing clarity about Co-Impact’s goals, values, and approach.

In interviews, twelve partners mention positive aspects of the handbook, including its clear theoretical underpinnings and articulation of concepts, provision of a vocabulary for partners to think and talk about systems change, and helpfulness for deep reflection by partners, who sometime use it as reference document.

²² A similar pattern exists for Co-Impact’s declined applicants: in 2023, 35 percent report having read some or all of the handbook, down from 50 percent in 2021

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“The handbook is improving. I’ve seen now, three versions of it. I make other people who are not into Co-Impact also go through the handbook.” – **Foundational Fund, Round 2**

“When we read Co-Impact’s handbook, and the overall handbook, and the LME handbook, it almost felt like we were reading our own writing. We felt very comfortable with that careful focus on our values and on power dynamics. That is something that you don’t see with many other funders that we work with.” – **Foundational Fund, Round 3**

“The materials [handbook, gender manual, LME guidebook] ...really helped us have deep reflections.” – **Gender Fund, Round 2**

Recommendations – Resources

- Consider ways for promoting and boosting readership of the handbook and different guidebooks among applicants and partners, for example, as a part of a welcome pack or a short webinar giving an outline of the documents.
- Collate and share among partners more examples of LME plans that have been developed and used by partners in different contexts and issue areas.

Mixed Experiences for Declined Applicants

In contrast to the experience of Co-Impact’s funded partners, declined applicants report similar or less positive perceptions of Co-Impact’s communications, processes, and resources than in 2021.

Of note, the declined applicant population surveyed by CEP in 2023 is considerably larger than in 2021 and 2019 as the application was open to a broader group of organizations through an open call for Round 2 of the Gender Fund.

When compared to the declined applicants of other funders that CEP has partnered with through the Applicant Perception Report, Co-Impact’s applicants provide typical ratings for Co-Impact’s transparency with their organizations, its accessibility, and its understanding of the social, cultural, or socioeconomic factors affecting their work. Their ratings are lower than typical for their perceptions of staff responsiveness and fairness.

In their survey responses, declined applicants’ ratings are significantly less positive than in 2021 for:

- The clarity of Co-Impact’s communication of its goals and strategies,
- Their agreement that Co-Impact’s expectations about the timeline for the applicant process are clear, and
- Their agreement that Co-Impact is primarily supporting organizations rooted in the Global South.

In another shift from 2021, applicants report feeling less pressure to modify their organizations’ priorities in order to create a proposal likely to receive funding.

In addition, a smaller proportion of declined applicants are aware of Co-Impact’s handbook, organizational strengthening guidebook, and LME guidebook. Those who have read some or all of these resources generally rate them positively. Of note, applicants who have read Co-Impact’s handbook rate significantly more positively than in 2021 for its helpfulness in providing information that has contributed to their work.

When asked about aspects of Co-Impact’s application process, applicants agree most strongly that the materials available to them were accessible (e.g., in their native or preferred language), that expectations about the timeline for the process were clear, and that information on the application process provided by Co-Impact on its website or through webinars were helpful (although ratings have not varied significantly from 2021). As in 2021, applicants agreed least strongly that webinars for declined applicants to explain the rationale for decisions were helpful.

Experiences of Gender Fund Round 2 Applicants – Due Diligence

CEP interviewed five Gender Fund Round 2 Due Diligence declined applicants from Round 2 of the Gender Fund who had been through Co-Impact’s due diligence process and received survey responses from eight such declined applicants. In interviews, these applicants share overall positive perceptions of their experience with Co-Impact’s processes and its frameworks. Still, several expressed disappointment with their declination and frustration with the length and intensity of the process for an ultimately unsuccessful application. Through the survey and interviews, these applicants suggest that Co-Impact consider supporting a broader range of organization types, collecting feedback from a greater number of applicants, and clarifying Co-Impact’s vision and “what they’re looking for.”

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“The language of funding that’s used in terms of systemic change, there’s a lot that can fall under that category.... If they could have given maybe indicators of potential projects they often have funded or are willing to fund, or something like a model, which they did sort of indicate in the webinars not in too much detail, it would have been a little better. It can just be a unilateral way of looking at systems change. Being able to diversify that, I felt like there was a little bit of gap there where there was some preconceived notions as to what systems change looks like, but it may not cover all the options possible.”

“Given that they already did a round of concept notes and then shortlisting, it would have been good if we had a conversation between the concept note being developed into a much larger proposal, because there was no indication as to why the selection was made. If we had that it would have given us some direction as to what bits to elaborate on.”

“We really appreciated the fact that it was one of the few funding applications which had a proper format and a brief one, as far as the concept note is concerned. It is very structured, they give you sub-headings of exactly what they needed to know, and also supplemented that with webinar information as to what each of those sections should convey to them, as potential funders. So in that case, it was very straightforward. The fact that it was not just, ‘Oh, give us a detailed description of the project’ but actually, a thought-out version of what you want to do, how you want to do it, who you want to do it with.”

“They kept saying that it has to be a female-led organization. Mostly the funding should be directed to a female-led organization. I think that it should be a little broad, it could be a female-led initiative, maybe the head of the organization might be a man but still, if the initiative is led by a female, it should not be discredited.”

Recommendations – Declined Applicants

- Revisit the current approach to expectation management regarding the possibility and amount of funding to be received for applicants, particularly for those engaged in a deeper understanding/due-diligence process.
- As already mentioned, ensure clearer communications regarding the application process and timeline upfront, and emphasize where and why core aspects of Co-Impact's intent are inflexible (e.g., systems change focus.)
- Manage expectations about the amount and depth of interaction with Co-Impact staff that applicants in an open call can expect to receive from Co-Impact.