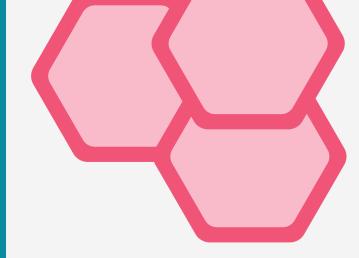


# COLLABORATION SUCCESS STORIES

Real-life case studies of collaborative philanthropy from the IEFG network



For IEFG eyes only: do not share



## **Introduction from Leonora Dowley**

The IEFG is changing. We're making big steps to support you as you move towards more collaborative efforts in your philanthropy.

**Collaboration** is not just a buzzword but a fundamental ingredient for success in today's interconnected world. You've read about what it looks like (check out Bridgespan's work if you haven't already) and now you want to get on with it.

That's why you've asked the IEFG to support you. You know that if you want to go fast, you go alone, but if you want to go far, you go together. Now is the time for inspiration and action.

...if you want to go fast, you go alone, but if you want to go far, you go together. We've put together these case studies, by IEFG members for IEFG members, showcasing collaborations between those members. They cover a whole spectrum of what working together can look like, from developing knowledge to informing

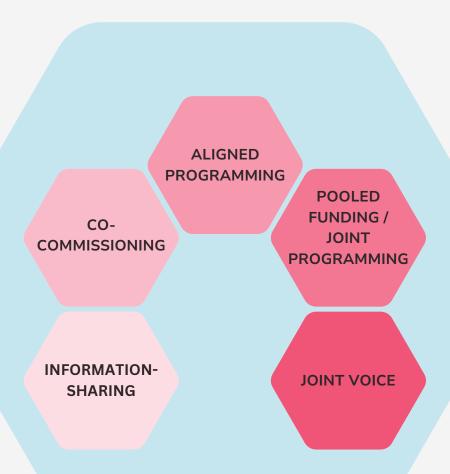
public policy, with co-funding sometimes in there too.

These are real-life examples from your network peers, sharing their learnings, experiences and mindset-shifts from their collaborative philanthropy. We hope they spark ideas for you.



As you read, think of yourselves as part of an orchestra, each playing a distinct part, but harmonising as part of a shared vision.

By playing off the same score, education philanthropy can create a symphony of change rather than a cacophony of separate voices. Our coordinated efforts build in collective crescendo towards a future where everyone has the opportunity for inclusive, equitable and quality lifelong education.



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As a Secretariat, we've been doing some serious thinking about what collaboration in education philanthropy looks like.

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The spectrum to the left shows that range; from information sharing (sending us data or joining show-and-tells), through co-commissioning work, aligned programming, and speaking with one voice (those of you who signed the Statement Supporting Education will know what goes into this).

This spectrum is underpinned by honesty, trust and community, which you're building as the IEFG, and the Secretariat are here to support. Have a think about where each of our examples falls on our spectrum, and where your own work might sit.

We understand that in the daily grind of program implementation, it's tempting to incentivise short-term outcomes to the detriment of more meaningful, sustainable results that could be achieved through collaboration.

But coalitions are key mechanisms, crucial for overcoming collective action problems. They can advance social change and build capacity within organizations.

We hope that the stories you read here will motivate you to try for yourself, so that you too can leverage the diverse skills and experiences of different partners, expand your circle of influence and the impact of individual actors and mitigate your risk by spreading it across multiple players.

We want you to go far, together.

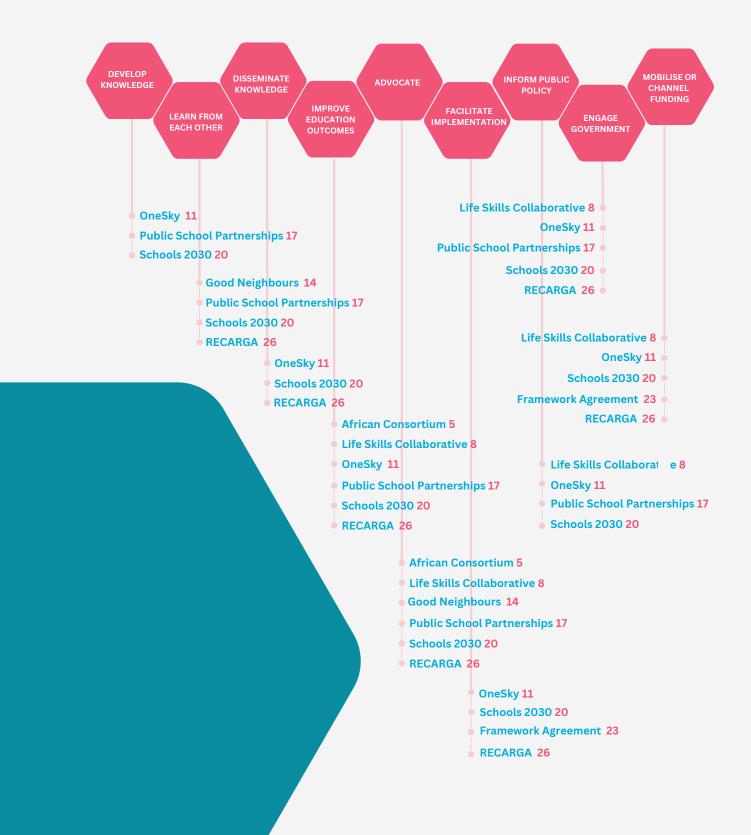
Leonora

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Interested in a particular aspect of collaboration? Use this contents table to find the relevant case studies and page numbers.



## African Education Research Funding Consortium





Imaginable Futures, Echidna Giving, Bill & Melinda Gates Foundation, Porticus, Jacobs Foundation, BHP Foundation, The LEGO Foundation, Zenex Foundation, Aga Khan Foundation, Wellspring Philanthropic Fund

## **ABOUT THE PROJECT**

A space for the African education funding community to share insights and identify promising ways to support policy research in the region in line with the five broad recommendations that were made by the participants of the Forum for Education Research in/by/for Africa in 2022.

Those recommendations were:

- Drive impact by supporting long-term vision.
- Respond to local needs, agendas and initiatives by funding local organizations in ways that support their own missions.
- Provide funding across the generation, communication and use of evidence.
- Deliberately support the inclusion of women, young people, minorities and other disadvantaged groups in education research.
- Promote dynamic learning.

## TYPE OF COLLABORATION

Coalition / Alliance with specific (broad) aims. One funder covered the cost of a Secretariat to manage the pilot phase, with discussions on funding for this going forward.



- Output
  Uptake of local evidence
- African researchers in the lead
- African research influencing alobal debates
- Strong, sustainable African education research systems
- African public and private funders in the lead

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- A chance to practise what they preach for funders: on commitment to localisation, they care about evidence and research, want it to be equitable and engage local voices, but it currently sits in the hands of Global North institutions.
- Aligns with strategy: the desire to look at evidence generation and utilisation and work with local organisations with lived experience in the communities they support.
- Increases accountability: in a sometimes fractured sector it's beneficial to agree to action responding to a problem statement and be held to it.
- Has practical value and supports sustainability: informs their approach to localisation and introduces them to a pipeline of local researchers and databases of who is being funded. Also increases proximity to local policy agendas, removing practical block of a lack of representation in every country.
- Increases understanding: especially of nuances. ie. Using an African research assistant is not the same as hiring them as a PI.
- >> Evidence-driven: valued for innovations.
- Increases efficiency: no need to reinvent the wheel when you can learn from peers or pick up the phone for advice.

## **COLLABORATION LESSONS**

>>> Concrete things get more attention: there are many working groups in the sector so if it feels too abstract it won't go far

**COLLABORATION SUCCESS STORIES** 

- >>> Be clear on who will engage from each foundation; if it gets bounced around due to strategy or personnel change it loses strength
- >> Consistent, ongoing communication is necessary to ensure everyone stays engaged
- >> Low barrier to entry with scope to do as much as you want helps engagement, combined with acceptance that not every member will do everything
- Have (fund) a secretariat so it's a light lift for foundations to get involved
- >> The collaboration is more likely to work if it's integrated into someone's daily work or objectives
- >> It's easy to be overambitious initially because so many people are involved; accept you can't do everything but keep conversations open
- At some point you need decision makers in the room to progress.

## **KEY MINDSETS / BEHAVIOURS**

- Structured or organic co->> **creation**: comfort with organic co-creation, coming from recommendations from those around the table, but with a structured start in terms of loaistics.
- **>>** Safe space creation: so every meeting is a space for genuine conversations and co-creation.

## **Definitions of success and**

**>>** failure: would the collaboration be a failure if it didn't reach a cofunding stage?

## Funding not at the forefront.

- **>>** comfort with non-financial arrangements between funders.
- Leading or following: changes in normal branding and **>>** communication style in either direction (more or less brand protection or promotion).

## Part-strategy approach:

**>>** although collaboration may not speak to whole strategy or portfolio it may be worth it anyway.

## Transparency and openness:

- >> comfort with sharing details about your foundation's internal processes.
- Patience: likely to take more time than if going it alone. **>>**

## Life Skills Collaborative





Echidna Giving, Porticus, Children's Investment Fund Foundation, Michael & Susan Dell Foundation

## **ABOUT THE PROJECT**

A collaborative focusing on championing socio-emotional life skills for India's young people to thrive, through an extensive on the ground outreach programme, to help them navigate through adversity.

The LSC has four tracks: a glossary of life skills, assessment tools to gauge the system readiness for fostering life skills, government engagement on data collection, translation and validation of assessment tools, and 'Voices', a nationwide engagement initiative to gather insights on the understanding of life skills and its needs from young people, parents and teachers.



- For India's youth to grow, thrive and succeed.
- The transformation of India's learning ecosystem and mainstreaming lifeskills education

## TYPE OF COLLABORATION

Pooled funding using DAF model, managed by Charities Aid Foundation, followed by a direct partnership for two funders in response to regulatory changes in India.



## **OTHER PARTNERS**

Omidyar Network of India, 4 state governments, 13 CSOs/NGOs

- Addressed problems funders had all identified: in particular the broken **>>** terminology in the life skills space and lack of contextual, robust, standardised tools around measuring life skills.
- Addressed a problem that is 'bigger than us': with acknowledgement that **>>** nothing will change if everyone tackles it alone.



- Start with a goal in mind!
- People are important in collaboration; sharing funds is not enough!
- Stakeholder management: internal (relationships between collaborating partners) and external, are important. They influence each other, so make time for it.
- Clarify how your grantmaking works from the outset (e.g. grants vs service contracts) and what you can and cannot do.
- It helps to align and share reporting.
- Take time to set up structures to get the most out of your project, eg. governance system, platforms for conversations, and learning systems.
- Think about healthy ways to encourage dissenting voices.
- Be agile and open to changing governance structures and deliverables
- Nurture a sense of co-creation and co-ownership - it doesn't happen automatically.

- >> Time and commitment: it will take more of both than if you're working on your own, but the outcomes can be worth it.
- >> Trust and honesty: context changes all the time; you need to be able to say how you really feel to weather any ups and downs, eg. regulatory changes that affect funding flows.
- Vocabulary: may need to change within your organisation to allow for a common language across the collaborators.
- Lowest common denominators: find them to work out what ties you together so you don't get lost once you get into the detail of what you want project details to look like.
- Humility: it's important to know where to come in and where to step back.
- Focus on the personal: to allow individuals involved to connect with each other, outside the remit of the purely professional.
- Align on value systems and principles of engagement upfront.

## OneSky





**Lorinet Foundation, Octava Foundation, Porticus** 

## **ABOUT THE PROJECT**

A programme addressing early childhood care and development challenges in Vietnam.

While modernisation has brought progress, one-third of all Vietnamese are still classified as "very poor", and children face increased risks of dislocation from their extended families, as well as poverty and human trafficking.

There are around 1.2 million children of factory workers living around the country's industrial zones. Quality day care and public kindergarten are out of reach for these disadvantaged families, and young children are frequently left in substandard care. Home-based care (HBC) providers often come into their roles with little or no formal training in early childhood education and development.

The OneSky Factory Model has been designed to address the challenges of early childhood care and development.

## TYPE OF COLLABORATION

Co-funding, with one point of contact between the funding partners and the implementing partner.



- Create a safe, nurturing, and stimulating learning environment for children of factory workers in Vietnam's Hoa Khanh industrial zone through OneSky Early Learning Centre (ELC).
- Using ELC as base, train local HBC providers to deliver quality care and adopt best practices within their own centres, reaching out to the 16,000 children of factory workers in Da Nang.
- Plan to create a national model of care for children of factory workers across Vietnam based on this pilot, by developing a 'viable model' that could be put under evaluation for efficacy to unlock further funding and demonstrate partnership for scale with the government.

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### **OTHER PARTNERS**

Vietnam Ministry of Education

- **>>** Collaboration fulfils a key pillar of funders' strategy: collaboration and ecosystem building run through their work. Cross-pollination of learnings across borders provides an invaluable opportunity to draw parallels by having two data sets and experiences in different geographies – Vietnam and Mongolia in this case.
- Brings together multiple capabilities: from funders and implementers **>>** to the government.
- Allows for advocacy and potential policy change: an RCT on early **>>** childhood helps to convince policy makers of the value of the work and the principles the partners stand for.
- >> Leverages funding: allowing each partner to catalyse evidence, reach and sustainability of the model.
- Collaboration was developed through trust-based relationships: with **>>** a key individual able to bring together two foundations through their own involvement with them.

- Programmes can fail because of externalities (such as Covid or changing community requirements), so it's important to work out the 'why' of your work first, then the 'how' can change and follow: spend as much time as you need working out the 'whys'.
- Trust is important, and helps to streamline things, such as initial investment cases and due diligence, plus reporting throughout the project.

- Whole organisation involvement: with everyone on board for the best results.
- >> Imagination: keep an open mind and you'll never know where you might end up - there really are no limits if you don't want there to be.
- >>> Trust-based and unrestricted resourcing: became a new practice following this learning journey on grant craft, partnership management and due diligence on regional partners.

## **Good Neighbours**





Porticus, LEGO Foundation, Jacobs Foundation

## **ABOUT THE PROJECT**

Three like-minded foundations, recognising their common interest across many projects and partners, coming together in an informal way to see how they can learn, share and collaborate in order to increase their impact.

Among other things, this has led to a joint report titled 'Challenging the False Dichotomy'. Good Neighbours started because staff from the three foundations realised that they kept 'bumping into each other' on project after project. When they 'mapped' the projects of shared interest, they realised that they were 'neighbours' - and asked how they could become 'good neighbours'.

## **TYPE OF COLLABORATION**

Informal alliance - Good Neighbours is not a project (although occasionally it spawns projects like the False Dichotomy report), but a space to learn across the varied agenda of the three Foundations. There is a facilitator funded by one partner, and occasional funded outputs.



- Share work and learning amongst trusted colleagues
- Work together on areas of shared interest from time to time



- Capitalised on a happy coincidence: and a realisation that they often cohabited the same space (literally and figuratively).
- Aligned to strategies: three foundations with overlaps in their strategic priorities and with differing strengths realised they had lots to learn from each other.
- **Built on the strengths of members**: with one foundation taking on responsibility for the facilitator, another for the first output etc.



- Mapping is useful to find common points between collaborators to kick-start work in common.
- Try to include the same people each time to allow conversations to flow easily between meetings.
- Chatham House Rules in talking spaces allow for a high level of trust between members.
- A facilitator who knows everyone well already is critical to keep everyone on topic, to ensure every participant is represented in discussions, and to keep things moving between conversations.

- Flexible mindset: to allow for changes in group dynamics as people leave and join the group.
- Alignment versus gaps: think about areas of overlap between to begin collaboration and then look for gaps to fill, rather than plunging into gaps straight on.
- It's fine just to say "good morning": like real neighbours, not everyone has to be involved in everything all the time.



## **Public School Partnerships**





## **ABOUT THE PROJECT**

The collaboration is a response to the structural challenges in South Africa's education system, and trials a new model of public school management. It draws on partners in the non-profit sector ('School Operating Partners') to improve the quality of service offered at government schools that serve marginalised communities.

## TYPE OF COLLABORATION

Co-funding, with one funder as a 'housing agent' with a cooperation agreement between all the funders as well as with the government.



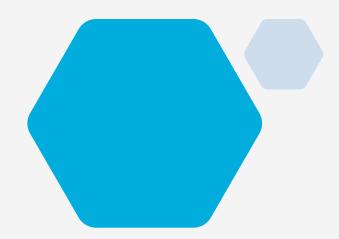
- Improve learner outcomes among a range of no-fee public school contexts.
- Innovate within the public school system, and document and communicate about these innovations on the mechanisms of school improvement for everyone to access.
- Advocate for the necessary practical, policy and political enabling environment for PSPs to thrive at scale across SA. with learner outcomes as the evidence base.



## **OTHER PARTNERS**

Millennium Trust, 4 NGO School Operating Partners, 19 schools. Provincial education departments (government), contracted development partners and service providers, ELMA, First Rand Foundation

- Fulfils funders' grantmaking strategy: their fundamental way of working recognises they cannot work in isolation and need to and should share information and knowledge and collective wisdom between reliable partners.
- Upholds core beliefs: including a commitment to working in partnership with government and civil society to do things differently.
- Brought together organisations aligned on values: of long-term investment into a systemic change initiative, and who expected to participate in the support and advocacy, alongside the provision of funding.
- Helped the advocacy case: for providing schooling with a new model of increased capacity, flexibility and accountability.
- Increases the power of collective influence in and of policy processes.



- Collaboration starts with (and is in itself) sharing information.
- A funders' group that can meet separately helped to build relationships of trust.
- A project management office helped to separate the delivery and management of the project from the strategic conversations of the funders.
- Build in a formal, mediated or facilitated way to work out any tensions between collaborating partners.
- Be clear and honest about where you come from and your hidden biases and assumptions: don't ignore race, gender, age, geographic location of the funding partners and assume that these characteristics are irrelevant.
- Have an 'anchor funder' who acts as the spine of a project to take responsibility and give the project a voice and a face.

- Collaboration in the education system: the project acts as a stimulus for system-wide change in the country.
- Strategic alignment: comfort with the idea that a collaborative project is only likely to align up to 80% with your own strategy, but collaboration itself is worth more than the missing 20%.
- Collaboration as a principle: not an add on, and an integral quality in all foundation staff.
- Balance: between appreciative enquiry during the new idea phases, with the initiative and urgency to set forth and trial while doing.

## Schools 2030





Porticus, Jacobs Foundation, Atlassian Foundation, Wellspring Philanthropic Fund, LEGO Foundation, Aga Khan Foundation, Imaginable Futures, Oak Foundation

## **ABOUT THE PROJECT**

A global movement for holistic learning and teacher leadership. This ten year action research and learning improvement programme brings together a diverse coalition which includes educators, school leaders, civil society, researchers, donors, international organisations and government across 1,000+ schools in 10 countries: Afghanistan, Brazil, India, Kenya, Kyrgyzstan, Pakistan, Portugal, Tajikistan, Tanzania, and Uganda.

The goal is to improve quality teaching and holistic learning, and to foster resilient education systems across the world, including for those living in remote regions and those facing multiple forms of marginalisation and crises. The project does this through a focus on teacher agency – recognising educators as leaders, innovators and active agents in education reform.

## TYPE OF COLLABORATION

Co-funding: each participating foundation funds a pillar of the work with separate outcomes and reporting



- Equip young people with the knowledge, skills, attitudes and values they need to become contributing and thriving members of their societies
- Recognise and amplify teachers as leaders, innovators, and active agents in education reform



## **OTHER PARTNERS**

Dubai Cares, IKEA Foundation, USAID, Itau Social, Education Cannot Wait, 10 national governments, 10 global south research/design partners, 1000 schools, 50,000 teachers

- Came at the right time: for their strategy, their trustees, their funding cycles, their priorities.
- Helps answer questions and provides high-quality outputs: in particular about the moves in education from access to quality, differences across countries, the impact of COVID and other funderspecific themes of focus.
- Is based on strong and high quality personal connections: with likeminded funders, allowing for trust and ease of work.
- Creates connections: which are particularly useful for a funder entering the space, as well as for more established foundations going through strategy changes.
- Has huge potential to influence education at a country level: through its strong relationships with Ministers of Education in the countries it serves, helped by the group of 'big names' involved.
- Allows for scale: that funders are otherwise unable to achieve alone, including the ability to leverage the knowledge and expertise of local leaders who better understand their local contexts to scale education innovations to millions of students globally, showing a clear path to system-wide change.
- Aligns with values: with a bottom-up, community-centred, participatory model rooted in the belief that local leaders and teachers have a strong understanding of the solutions needed to enact change in their own communities and countries.

- Be clear about the ask at any given moment: is it a moment for raising funds or a moment for cocreation?
- Be clear about who has a seat at the collaboration table, and how and when you involve your grantees.
- Be clear about the point of any convenings: are they for information sharing? For cocreation and planning? For celebration? For grantees and funders to come together? It's helpful to specify who they're for and who gets what from it.
- A 'critical mass' can help push things forward: once enough foundations are involved in an initiative, others are likely to overcome their reservations.
- Interpersonal relationships are important, and can be the tipping factor that encourages a foundation to enter a collaboration.
- There is often an initial appetite for risk and innovation, but if there's nothing to show for it at the end of a funding cycle it's likely that things won't go further.
- Decisions about co-funding or pooled funding, and whether opportunities get lost in the gaps between the co-funded 'tracks'.

- Risk appetite: how to convince a Board to consider different types of risk.
- Trust: if your foundation isn't managing the overall programme.
- Strategic alignment: the gains from the project may outweigh the fact that a collaborative programme does not align 100% with your foundation's strategy.
- Levels of participation: not every participant will be as active as the others.
- Nuance is important for understanding.

## Framework Agreement





Edelgive Foundation, Dalyan Foundation

## **ABOUT THE PROJECT**

This collaboration has existed between Dalyan and Edelgive since 2016. Under this strategic partnership Dalyan contributes directly to selected NGOs and their programs that are also financed by Edelgive. Edelgive has become the connecting platform between grant makers/donors and NGOs across the country, with the mission to build a strong, efficient and high impact social sector for a better India.

## TYPE OF COLLABORATION

Joint funding of NGOs, based on recommendations of the local funding partner.



- To support small and mid-sized NGOs in India.
- To build a strong, efficient and high impact social sector for a better India.
- To jointly support selected organisations over a period of time: to exchange and learn together.



### **OTHER PARTNERS**

NGOs in India

- Allows greater reach: for example to NGOs in countries or regions within the target country where a partner does not have a presence and to other partners they would not usually meet or be able to work with due to remoteness, language barriers etc.
- Helps leverage existing resources: through choosing to invest where the partner organisation already grants.
- Addresses internal staff constraints: where a foundation could grant more but is limited by the number of staff they have to manage and monitor their grants, indirect relationships with grantees allow greater levels of funding while maintaining a small team.



- Convincing Boards of new ways of working can take time, and an effective way of creating the necessary trust is to make sure they have an opportunity to speak to partners personally.
- Difficult times call for imaginative measures to keep all partners engaged, for example virtual field trips (movies and interviews) throughout Covid.
- You may have to kiss a few frogs before you find your prince: don't be afraid to have conversations with several potential collaborators before you find the right fit.
- Organisation size matters: efficiency may decrease as decisions taking becomes more complicated.
- This is what trust-based philanthropy truly looks like!

- Trust and respect: this grew when partners were totally honest about what they wanted to see and get out of the project.
- Sharing: in the form of a shared staff across the two foundations has deepened links, conversations and trust.
- Lack of ego: personalities of leaders is important.
- >> Clarity: clear communication and well articulated goals strengthen the partnership it takes two to tango!

## **RECARGA**





## **ABOUT THE PROJECT**

A programme in Central America that first formed to accelerate education recovery post-Covid. Persistent school closures during the pandemic interrupted access to education for millions of students in Latin America, with potential generational consequences.

Early in the pandemic, Tinker, Summit, and other funders observed that the frontline organizations at the centre of educational recovery seemed least likely to receive necessary financial support.

A coalition of nine funders, including implementing partner and RECARGA hub Global Fund for Children, has joined focuses to support and strengthen 15 education organizations in Guatemala and Honduras.

## TYPE OF COLLABORATION

Co-funding



- Ensure a return to school for children in their communities, address academic gaps, and provide wrap-around support to students.
- Advocate for expanded access to quality education for all children and ensure that equity, quality, and access remain at the centre of post-pandemic education system plans and investments.
- Strengthen networks for advocacy and learning by exchanging information and approaches, articulating and advancing shared priorities, engaging with experts and stakeholders, and participating in capacity-strengthening activities.

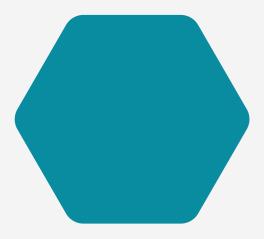


### **OTHER PARTNERS**

Focus Central America, International Community Foundation, The Summit Foundation, Vibrant Village Foundation, Ward Foundation, individual donors and family members, CIPE Honduras and Population Council Guatemala (serving as "resource centers" for local CSOs), and 15 CSOs in Guatemala and Honduras.

- Had the ability to mobilise many times the resources they could have individually deployed: with all funders bringing something different or extra to the table and waves of new donors coming on board.
- Opened learning opportunities: as part of a community of practice, from and between other foundations and donors.
- >>> Enhanced support to CSO partners: GFC's involvement gave CSOs access to organizational strengthening opportunities, and all received support to implement child protection policies and practices.

- Principles are important: it's worth taking time as a collaborative (with a lead) to construct some that are specifically articulated for partners to sign up to, even if they're not legally binding.
- Partners join for different reasons: some for the how (the way of working) rather than the what (if they are not historically strong funders in education), some for the opportunity to build relationships with aligned CSOs.



- Weending funder-centric norms: through quarterly calls about learning designed to keep funders engaged without burdening CSOs.
- Letting go: particularly of reports in standardised templates for funders.
- Chemistry: important between funders to allow for the development of shared agendas.
- Risk and belief: a belief that others will follow if you pave the way strongly enough.
- Horizontality: creating spaces for CSOs and funders to come together in more informal ways to learn from each other and challenge entrenched power dynamics.

## What next?

If these collaboration success stories whet your appetite, don't forget that the IEFG Secretariat are supporting opportunities for you to collaborate through our thematic Corners (currently FLN, Nutrition, and EdTech, with Climate and Teachers coming in September), geographic Chapters (currently Asia and Kenya; with Pakistan, Jordan, Ghana and Sierra Leone kicking off now), and global constituencies (the SDG4-Education 2030 High-Level Steering Committee convened by UNESCO, and the GPE Private Foundations Constituency).

We'd love to hear from you on where you'd like support from us as we move into the second half of 2024 and beginning of 2025.

I'd like to thank all of you who spent time talking to me about your collaborative work over the past few months. It's been a pleasure to get to know you, and to hear about the real efforts you're making to work as part of a whole system. I've been encouraged to hear stories of trust, openness, patience and humility, and I hope you have too.

This is your chance to define and reach your shared goals – show each other what you've got!

Leonora and the IEFG Team