



## INSIGHTS AND PERCEPTIONS *NEW PARTNERS IN SOUTH AFRICA EVALUATE IDEX*

### Summary Findings

Over the last 25 years, IDEX has built an effective and robust grantmaking and alliance-building model. IDEX partners with community-based organizations in the Global South to challenge powerlessness, exclusion and discrimination; to this end, IDEX created an alternative and responsive model to: (1) secure economic justice, (2) promote women's rights, and (3) protect the natural environment. Of core importance, the IDEX partnership model is anchored to the democratic principles of mutual accountability, equality, transparency, and collaboration.

What makes IDEX's approach work? What makes it different? To achieve mutual accountability and joint responsibility, IDEX strives to keep an open flow of communication with our partners. Over the years, we have worked consistently with partners in Asia, Africa and Latin America, to determine which elements, methods, and practices are essential. Understanding partner perspectives is critical to our programming and philanthropic success.

In November 2010, we sought the expertise of an external consultant to connect with our new South African grantee partners to gain a better understanding of how they, as new partner grantees, view our partnership selection process and grantmaking approach. In accordance with our practices, IDEX will incorporate these findings into our grantmaking processes and philanthropic model.

### *About the Grantee Experience and Insight Report*

*The Grantee Experience and Insight Report (GEIR) is a tool whose ultimate goal is to improve grantmaking practice. GEIR begins with the premise that a grantmaker's effectiveness is not only about what is funded—good projects, programs and people. It is also about how it is funded—good practices, policies and procedures. GEIR affirms that effectiveness is greatly enhanced when a grantmaker's methods of working serve to enable and empower grantees and build relationships of openness, respect and trust.*

*GEIR explores two broad areas: Values and Practice. The Values component looks at a grantmaker's articulated values and checks these against the experience of grantees. The Practice component invites grantees to provide honest feedback on the varied elements of the grantmaking process, including proposal and reporting requirements, grantmaker/grantee interactions such as site visits, communication and more.*

*For grantees, GEIR offers a safe and confidential space to reflect on and describe their experience with a funder, "speaking truth to power" as the saying goes. Through GEIR, grantmakers gain an understanding of how their practices, policies and procedures are experienced by their most important stakeholders, their grantees. Participation in GEIR affirms a grantmaker's commitment to continuous learning and to authentic partnership.*

*The Grantee Experience and Insight Report is a new tool developed by John Harvey, and pilot-tested using in-person interviews with IDEX's four new grantee partners in South Africa.*

# Report Highlights

Across the board, IDEX grantees think very highly of IDEX's adherence to its values and the quality of its practices. Grantees stated that, to a great extent, they view their relationship with IDEX as a strong partnership, but observed that there is always an inferred hierarchical difference between grantor and grantee. It was noted that IDEX makes an effective effort to minimize this inequality with a grassroots approach that is sensitive to partners' needs.

**4** “When I was with them [IDEX staff] in person it was as if we were one staff with one aim. This felt like a real partnership.”

“Of all my donors, I'd put IDEX on the top of the list.”

“They are very conscious of power, and you see it in the letters they write. They have a very humble point of departure... I am absolutely allowed to be what I want to be in their company, which is honest and to the point. If the truth is not good, they still like it.”

Grantees have found IDEX to be very helpful in regards to strengthening their organization. Seventy-five per cent of respondents noted that IDEX asks questions that stimulate their thinking. They noted that IDEX sends information on other NGOs and on potential funding sources, which has also been helpful. One grantee added that IDEX has provided them with additional exposure and that people have contacted them as a result.

**4** “I have a very positive feeling about IDEX. I feel positive about the staff, about the way they communicate. I don't know if it will change, but for now I am very humbled and happy to be one of their partners. In terms of intelligence and respect, I have learned a lot from them.”

“They've influenced our thinking based on their fresh approach to grantmaker/grantee relationships, and I've since raised these issues at donor forums. I remember them asking a number of questions that provoked my thinking. I wouldn't say that they drive my organization, but they've triggered some good debates.”

## Values Assessment

- IDEX received very high ratings on accountability. Grantees were clear that they understood that accountability goes both ways. “Compared to other funders, IDEX has always come through on promises. They are a really great partner to work with.”
- IDEX received the highest possible rating on integrity. “They've carried through on their work every time. They don't make commitments they don't follow up on.”
- IDEX received very high ratings on transparency. “Everything I asked they were able to answer honestly. They are very open about how they operate.”
- 75% gave high ratings for equity, while one grantee was “not sure.” There was some confusion as to the meaning of the term, with one interpretation referring to equity between IDEX and the grantee, and another referring to gender equity within the organization.
- On supporting grassroots solutions that are free from agendas imposed by governments, corporations, or funding agencies, IDEX received the highest rating. One grantee noted, “There is always an agenda with funders... IDEX doesn't have an agenda. If you need a salary funded, that's what they fund.”
- IDEX's ratings on supporting local knowledge and leadership that encourages sustained community development were the highest possible. “IDEX hasn't come to me and said 'Implement this program or this program.' They've said, 'Which program would you like IDEX to support?' They've totally encouraged us. All the suggestions they have made have been very helpful. They've asked questions rather than told us what to do.”
- IDEX received very high scores in the categories of respect, clarity, consistency, humility, flexibility, consistency, responsiveness, openness and promptness.

# Practice Assessment

## Catalyst Grantee Program

Before pursuing long-term partnerships, IDEX makes a one-time grant of \$5,000 to potential partners. Based on the experience of this relationship, IDEX determines whether or not to pursue a long-term grantee partnership. All of the four grantees interviewed have gone through the Catalyst Grantee Program and all agreed that this period provided an adequate amount of time for their organization to demonstrate its effectiveness. The small size of the grant, is potentially problematic, it was noted, as costs in South Africa can be quite high, and \$5,000 does not go a long way.

*“It’s a very important process for building a relationship with IDEX. This was a period that allowed me to see who I am actually dealing with, what their likes and dislikes are, to prepare myself for the future. This program was an eye-opener for me. I had not heard of this kind of program...this period gave me the chance to dream. It’s a process that needs to be encouraged... I don’t know what the program costs IDEX, but it’s worth the price.”*

*“The small size of the grant was challenging, especially with the exchange rate. It was hard to spread the money over that long period of time. At the same time we were pleased with getting it. It helped keep our organization going. It surprised me that we could use it for basics. It was a lifeline grant for us.”*

## Site Visits

IDEX staff conducts site visits prior to providing Catalyst Grants. Each of the participating grantees was visited by IDEX staff who conducted 2-3 day visits to the grantee's office and with community groups in the field. All four grantees view the visits as a positive experience, due to respect and cultural competency demonstrated by IDEX staff throughout the visits and the clarity of IDEX's objectives in visiting with organizations. All grantees viewed IDEX's competencies with site visits highly favorably.

*“They showed a lot of respect. We blended. You could say they were South African girls. We sang the same songs, we ate the same food.”*

*“They were very clear about what they wanted to see, how much time they’d spend.”*

More specifically, most grantees (three out of four) felt that they were given adequate time to arrange and prepare for the site visit, with at least two to three months advance notice. One group only had a few days notice, since IDEX staff only heard of them while in country, so the decision to meet with them was last minute. While stressful, they were ultimately very grateful that IDEX reached out to them. All felt that IDEX staff demonstrated respect throughout the site visit, to staff, community members and others they interacted with, and showed cultural competency. An area of improvement could be for IDEX staff to invite these groups to express their own expectations for the site visit.

## Documentation

IDEX requires grantees to submit an annual workplan and progress reports after the receipt of a grant. Overall, grantees view IDEX's documentation requirements as very favorably because they find the materials easy to understand and feel supported by IDEX staff in getting clarifications, and meeting the requirements. Two organizations felt that some of the questions asked can be challenging, such as on specific details on socio-economic conditions, for a small non-profit. On the other hand, there was understanding that this kind of question need not be answered if good information is not available.

*“IDEX only asks for two reports, which is reasonable. The reports allow me to evaluate myself and give me a chance to see if I’m working effectively. Some funders want monthly reports or quarterly reports, and this is too much.”*

## Ongoing Communication

Grantees noted that ongoing communication with IDEX is a positive experience. Frequency of communication is viewed as appropriate, IDEX's response to inquiries is prompt and IDEX staff conducts themselves in a respectful and open manner.

*"They have a really nice, fresh approach in that they are so respectful. They always start their letter checking in on how you are. That's a very Xhosa thing. You always ask how people are first."*

## ***Sample Insights and Recommendations***

As a learning organization, IDEX encourages ongoing feedback from partner grantees to improve our grant-making model. Through the GEIR Survey, IDEX partner grantees provided valuable insights and recommendations. Here are some examples:

- IDEX should do more to get the word out on its model of partnership and its Catalyst Grantee Program, especially with South African donors. Grantees can make introductions to these donors.
- IDEX should make sure that all its grantees in South Africa know one another and are in touch. IDEX should consider convening its grantees periodically for networking and learning.
- IDEX should consider changing the name of the Catalyst Grant Program. "Catalyst" is a confusing word; the grant is a catalyst for IDEX but not for the grantee. The word would imply to a grantee that they need to start something new to get a grant.
- IDEX should increase the grant amount for both the Catalyst Grantee Program and regular grants. This may not be necessary for other countries where IDEX works, but it is necessary for South Africa, where costs are high.
- IDEX should commit to helping grantees learn and build their capacities, including on the issue of gender.