EXECUTIVE SUMMARY

International Development Exchange (IDEX) is a nonprofit grantmaking organization that provides long-term flexible funding for initiatives in the most under-resourced communities in six developing countries to empower women, build local economies, and care for the environment. IDEX’s grants are augmented with capacity building support and brokering of resources. Currently, IDEX has partnerships with 19 organizations from two to more than 12 years; an additional seven are considered “catalyst” or new grantees.

IDEX’s partnership approach to grantmaking turns the cultural paradigm of how international “aid” efforts have been historically conducted upside down by relying on the wisdom and strength of local people who are fighting for a better quality of life in their communities. IDEX’s human rights grantmaking promotes an understanding of rights and responsibilities of local people to tackle powerlessness and exclusion. The underlying assumption of this type of human rights grantmaking is about relying on local leaders’ insights, knowledge and actions that ultimately bring about lasting changes in attitudes and behaviors needed to shift cultures. Working in this way is not easy or simple. It is not the traditional welfare and charity grantmaking model but about fundamental social change.

The basic evaluation question we seek to answer in this study is how effective has IDEX’s partnership model been from the perspective of its partners? Sixteen organizations that have been IDEX partners for more than two years in six countries responded to an online survey, which is an 84% response rate and nine partners participated in one-hour individual interviews.

KEY FINDINGS

1. **100% OF SURVEY RESPONDENTS INDICATE THAT IN THEIR EXPERIENCE, IDEX STAFF ARE RESPECTFUL ALL OF THE TIME, AND ARE TRANSPARENT, AND ACT WITH INTEGRITY EITHER ALL OR MOST OF THE TIME.**

IDEX receives high marks by its partners for walking its talk, showing genuine respect for partners, and being mindful of the power differential that is often a barrier to building a genuine relationship between a grantor and grantee. These principles are the benchmarks of an authentic relationship that add value to an otherwise transactional association between a funder and its grantees.

In philanthropy, a field that is often littered with self-important practices, IDEX stands out to its partners as a breath of fresh air. IDEX’s partners appreciate IDEX staff for practicing its values of respect, open communication, responsiveness and integrity, which are indispensable core ingredients required for an authentic, two-way relationship.
2. EIGHTY-TWO PERCENT (82%) OF PARTNERS FIND IDEX’S PARTNERSHIP MODEL TO BE VERY OR MOSTLY EFFECTIVE. AREAS FOR IMPROVEMENT ARE TO INCREASE IDEX’S FUNDING BASE AND NOT DELAY THE RELEASE OF COMMITTED FUNDS.

IDEX’s partnership model wins high marks from partners for providing long-term flexible support that funds locally-driven solutions to address the greatest challenges. They appreciate the connections IDEX helps them to make - locally, regionally and especially globally. They welcome IDEX site visits as opportunities to deepen relationships. IDEX trusts its partners to be thoroughly knowledgeable about its local contexts, assets, cultures and needs. IDEX is able to discern effective local leadership and supports their vision for their communities.

Their top concern is for IDEX to grow its own financial success. Moving forward, it bodes well for IDEX to focus more of its efforts in cultivating existing and new donors and growing its grantmaking budget as well as its own endowment.

3. WITH IDEX’S SUPPORT, 75% OF PARTNERS REPORT MEETING ALL, OR MORE THAN HALF, OF THEIR GOALS TO ADDRESS LOCAL NEEDS.

Evidence of meeting local needs cited by respondents include strengthened local leadership, especially of women leaders; facilitated climate change and gender workshops for local youth; increased participation of women in program activities; diversification of food planted in local farms and home gardens; more community members being elected or selected to participate in Self-Help Groups (local organizing bodies) and/or local governments.

This is a significant finding for two reasons. Having 75% of its partners able to meet all, or over half of the self-defined objectives for partners working to address deeply entrenched socioeconomic issues, under any circumstances, is a major accomplishment. Second, IDEX’s funding ranges between $5000 to $20,000 and are not large grants, but the grants are provided in a long-term basis for a minimal of three years, with some going on ten or more years, to support core operating costs, and can be used flexibly to meet the needs of the local partner. Partners are able to rely on this revenue source and leverage it with other funds to engage in the long-term work of transforming their communities.

4. EIGHTY-EIGHT PERCENT (88%) OF SURVEY RESPONDENTS STATED THEY HAVE BEEN ABLE TO DEVELOP LOCAL, COMMUNITY-BASED SOLUTIONS, EITHER TOTALLY (7%), OR TO A GREAT EXTENT (81%) SINCE RECEIVING A GRANT FROM IDEX.

IDEX’s long-term flexible support to be used by partners in ways they see fit is a highly extolled but unfortunately still rare philanthropic practice. For NGOs, attaining this type of long-term flexible support to sustain its programs is perhaps a most desired objective for social sector fundraising today. IDEX has much to share with other funders and donors why and how providing long-term flexible support leads to community-based solutions that last.

5. SCALING UP: IDEX PARTNERS HAVE BEEN THE MOST SUCCESSFUL IN INCREASING INFLUENCE IN THEIR COMMUNITIES, BUILDING A MORE EFFECTIVE INFRASTRUCTURE AND SYSTEMS, AND EXPANDING GEOGRAPHIC SCOPE. PARTNERS HAVE BEEN LESS SUCCESSFUL IN INCREASING OR DIVERSIFYING OR STABILIZING FUNDING.

Survey respondents indicated that the most important aspects of scaling up were the number of people/families served, depth of services, and geographic area served. However, there are other perspectives about growing the work in depth, impact, and influence and not always about growing in size. There is a role for IDEX...
to play in shifting the thinking and expanding the discourse about scaling up – growth is not necessarily the best or only indicator of success.

To address partners’ desire to increase and/or diversify funding, IDEX ought to consider making more of a focused effort in helping partners develop deeper relationships with potential new funders. This work may include organizing and hosting regional gatherings of partners, and inviting other funders and their grantees; attending meetings with other funders at the invitation of partners; setting up meetings with other potential funders and/or donors and showcasing the work of partners at conferences and events.

6. VISIBILITY AND INFLUENCE ARE RISING FOR IDEX PARTNERS - 53% OF PARTNERS INDICATE THE NUMBER OF PEOPLE INTERESTED IN PARTICIPATING IN THEIR ORGANIZATION’S PROGRAMS HAS INCREASED GREATLY SINCE RECEIVING IDEX FUNDS.

One-third, or 33%, of partners have experienced a great or moderate increase in local contributions. This is particularly significant given the challenging local conditions in which partners work. When asked about local media coverage, almost half, or 47%, of IDEX partners have experienced great to moderate increase since receiving funding from IDEX. Sixty percent (60%) of IDEX partners experienced either great or moderate increase in their ability to influence decision-makers since receiving funding from IDEX.

IDEX could help harness the lessons learned by partners in increasing community influence by sponsoring regional gatherings where they come together to share stories, practices and successes.

7. IDEX PARTNERS HAVE DEVELOPED STRONGER ALLIANCES AND LINKAGES TO SOCIAL CHANGE ORGANIZATIONS AND MOVEMENTS IN THEIR LOCAL AREAS, REGIONS AND INTERNATIONALLY. PARTNERS ATTRIBUTE HAVING STRONGER INTERNATIONAL TIES MORE SO TO IDEX.

Sixty percent (60%) of IDEX partners agree their organizations are better linked with other social change organizations in their local areas.

Sixty percent (60%) of IDEX partners are more engaged with social change movements in their country or region. All respondents identified this as an important or very important priority.

Eighty-five percent (85%) of IDEX partners have developed stronger links with social change movements internationally. Almost all, or 93%, identified this as an important or very important priority area. More than half, or 60%, of respondents attribute this progress to IDEX funding.

Several partners who were interviewed mentioned that IDEX could help convene partner organizations currently and/or previously funded by IDEX to promote peer-to-peer learning in their countries or regions.

8. ON IDEX-HOSTED SITE VISITS TO THE U.S., PARTNERS BENEFITTED THE MOST FROM GAINING NEW INFORMATION AND KNOWLEDGE, AND MEETING OTHER GROUPS WORKING ON SIMILAR ISSUES.

Six of the 16, or 38%, of survey respondents indicated they had participated in a site visit to the U.S. hosted by IDEX. Partners found in-person meetings with allies to be the most helpful, followed by invitations to speak on panels at conferences. This is a practice that ought to continue since partners’ experiences seem to suggest they derive great value from IDEX hosted site visits.
9. **THREE-QUARTERS, OR 75%, OF IDEX PARTNERS THAT HAVE RECEIVED IDEX SUPPORT FOR THREE YEARS OR MORE SAY THEY CAN MEASURE A SIGNIFICANT AND SUBSTANTIVE POSITIVE CHANGE IN COMMUNITY MEMBERS’ LEADERSHIP AND BEHAVIOR.**

Examples respondents cited for positive change in community members’ leadership and behavior include more women participating in community activities and volunteering to take on leadership positions; overall sanitation, care and hygiene; increased respect for and consultation with women; growing a wider varieties of crops; more health seeking behaviors, care of children and school enrollment.

10. **WHEN ASKED, “WHAT MAKES IDEX DIFFERENT?” PARTNERS EMPHASIZED IDEX’S LACK OF EGO AND AGENDA, RESPECT FOR LOCALLY-DRIVEN SOLUTIONS, LONG-TERM, DEPENDABLE SUPPORT AND ABILITY TO BROKER AND CONNECT PARTNERS TO OTHER RESOURCES.**

Findings from this learning and evaluation report **affirms IDEX’s partnership model.** Its commitment to make long-term flexible grants to support locally-determined solutions is an extolled but still hard-to-find practice in philanthropy. IDEX’s partners are able to succinctly articulate the progress they are making locally - empowering more women as leaders, enabling farmers to be sustainable agricultural innovators, and supporting community members as more confident human rights advocates. IDEX’s resources are making a lasting difference in the lives of many.

**CONCLUSION**

IDEX’s niche, as perceived by its partners, is its commitment to providing long-term flexible support for locally-determined solutions. IDEX is further recognized for its lack of personal or organizational ego, for being humble and open and transparent. Partners have also made three things clear; partners want (1) IDEX to focus on growing its financial base; (2) IDEX to hold partners more accountable for self-defined results and (3) when IDEX faces a financial constraint, let partners know well in advance, and consider making smaller, incremental grants toward the total committed amount.

Moving forward, it bodes well for IDEX to **focus on growing its financial base,** growing its influence in the field of international philanthropy by **becoming a more visible and vocal advocate for its partnership model** and **building the capacity of other funders** to understand why and how it is practiced. IDEX is well placed to lead this advocacy effort that challenges the traditional welfare and charity approach in support of a transformative, human rights grantmaking model that stops short of nothing but fundamental social change.
**IDEX THEORY OF CHANGE**

**VISION**

1. Robust civil societies in the global south, with effective CBOs that are building new, alternative systems & holding governments accountable to ensure systems work for the excluded and marginalized.

2. CBOs are grounded in local communities, working in alliance regionally to impact national policy change, and mobilize broad public participation globally for justice.

3. Philanthropy works to serve community-led initiatives through forging learning partnerships with grassroots groups.

**INPUTS**

- 870 current funders and donors — and growing
- 26 current CBO partners in 6 countries
- $1 million budget
- 25 year track record
- Dedicated staff and board members who are passionate about the work

**ASSUMPTIONS**

- Existing economic and political systems exclude and marginalize populations including small farmers, indigenous peoples, women, rural communities, and slum dwellers.
- Community-based organizations (CBOs) organizations have the power to build local skills and capacities, to link and mobilize resources, and to create/innovate new systems to end poverty.
- IDEX exists to shift power dynamics — individuals and communities to step into their power as leaders and game changers; philanthropy to adopt more egalitarian practices and to balance learning between global south and north that engenders hopefulness; raise resources and facilitate connections. IDEX adds value by leveraging and increasing access to resources, acting as a multiplier effect.

**STRATEGIES**

- Identify innovative, locally-based organizations and engage in partnerships over 3-10 years with flexible financial resources ($5-$20K/year)
- Broker and/or provide capacity building support
- Broker connections to other funding sources
- Intentionally build strong ties between leaders and movements globally
- Advocate for grassroots-led development, local leadership and initiative
- Work to inform/influence practices of funders and donors

**OUTCOMES**

**SHORT - TERM**

Civil society partners have **INCREASED CAPACITY TO ADDRESS LOCAL NEEDS** by:

1. Meeting self-defined goals to alleviate local conditions and develop indigenous solutions
2. Developing local leadership at all levels of the community

Civil society partners have **INCREASED CAPACITY TO SCALE UP** due to:

1. Having more effective infrastructure, systems, skills and capacity
2. Having more diversified and stable funding
3. Expanding and/or improving services
4. Expanding geographically
5. Increasing influence in communities and with policy makers

Partners’ **VISIBILITY AND INFLUENCE** are increasing. Increased alignment with other community groups. Joint strategies are pursued.

Donors, foundations and affinity groups: change in **ATTITUDES, BEHAVIORS, SKILLS AND KNOWLEDGE TO MOBILIZE RESOURCES** for grassroots groups and community-driven solutions.

**INTERIM**

**LONG - TERM**

- Community members see themselves as leaders and have **STRONGER LEADERSHIP SKILLS** to improve their own and others’ livelihoods. Behaviors of community members are changing for greater self-reliance.
- Community partners **SERVE MORE PEOPLE AND FAMILIES**. Expanded programs yield greater influence and visibility to strengthen civil society.
- Community partners link increasingly **WITH OTHER SOCIAL CHANGE MOVEMENTS LOCALLY, REGIONALLY AND GLOBALLY**. Stronger policy influences, especially through joint initiatives.
- More **ACCESSIBLE, EFFECTIVE PHILANTHROPIC ADVOCATES** and partners with global southern grassroots groups.

- Measurable changes in communities are sustained. **GREATER LEVELS OF CAPACITY** to manage natural resources, own economic inputs, and create viable livelihoods within communities.
- Stronger, more **SUSTAINABLE AND EFFECTIVE COMMUNITY ORGANIZATIONS** have the capacity to provide specific services and to hold governments accountable for delivery of public services.
- Policies that impact resource distribution are more equitable. **SOCIAL CHANGE MOVEMENTS ARE MORE CONNECTED and vibrant**.
- **INCREASED PHILANTHROPIC DOLLARS** channeled to grassroots groups through culturally competent practices.
Shiree Teng has worked in the social sector for 30 years as a social and racial justice champion – as a front line organizer, network facilitator, capacity builder, grantmaker, and evaluator and learning partner. Shiree brings to her work a lifelong commitment to social change and a belief in the potential of groups of people coming together to create powerful solutions to entrenched social issues.

Shiree has an intimate understanding of the issues and challenges related to working in communities of color and dynamics of class, culture and power. Having spent her life in the social sector, Shiree comes to the work from the perspective of building capacity. For the past thirteen years, Shiree has worked as a Program Officer and Consultant to Packard Foundation’s Organizational Effectiveness program. She is a member of the national consultant pool for Building Capacity for Organizational Resilience and Renewal (BCORR) supported by a collaborative group of social justice funders. She is a member of the RoadMap consulting team, with roots in French American Charitable Trust’s Management Assistance Program. She has worked in the Mid-South Delta region and Benton Harbor, Michigan with Omowale Satterwhite, founder of NCDI. Shiree was the lead evaluator for Rockwood Leadership Institute, and continues to support RLI’s learning and reflection process. Shiree leads by serving, using a culturally-based approach and relying on core competencies of strategic thinking, listening and synthesizing, connecting, and mobilizing action.

Shiree chairs the board of Ella Baker Center for Human Rights. In 2008, Shiree received the Alliance of Nonprofit Management Capacity Builder of the Year Award, and was a member of Grantmakers for Effective Organizations (GEO) National Conference Planning Committee.

Born and raised in Hong Kong, Shiree is fluent in three Chinese dialects. Having lived and worked in Watsonville and Salinas with canny and farmworkers, Shiree has a functional understanding of Spanish. She holds degrees in Social Welfare and Psychology from the University of California, Berkeley and is a doctoral student in Human and Organizational Development at Fielding Graduate University. She lives in the Fruitvale District in Oakland.