

# Funding for a healthier civil society

## Lessons from an OSF program

Megan Colnar | December 2021

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# About and acknowledgements

The Economic Justice Program (EJP) of the Open Society Foundations ran from 2018 until the end of December 2021. During this time, and building on the work of its two parent programs (Fiscal Governance and Economic Advancement), EJP developed the Foundations' first-ever strategy dedicated to fighting economic injustice and pioneered approaches to good grantmaking for social change.

**This brief summarizes early successes and lessons from EJP's pilot Organizational Health Fund, the first such fund at OSF. Our hope in sharing these insights is to equip grantee partners seeking OHF-type support and to inspire funders looking to develop similar practices.**

This learning brief and the lessons within would not have been possible without those who developed, led, and championed the Organizational Health Fund at Open Society Foundations' Fiscal Governance Program and Economic Justice Program, Megan Colnar and Caroline Raue. In surfacing the lessons from our experience, this brief has greatly benefited from the input and feedback of a number of people, including Andrea Azevedo, Hannah Caddick (consultant), Ernesto Espin, Chantal Pasquarello (consultant), Robin Varghese, and all OHF grantees.

If you'd like to learn more about these insights, contact Andrea Azevedo. For more reflections from the Economic Justice Program, take a look at our other learning briefs: building a culture of evidence and learning; and more than a strategy.

**This is not an official Open Society Foundations publication; the views within are the author's own and do not represent the views of the organization.**

# Why fund organizational health?

Vibrant and inclusive societies in which governments are accountable and all people can participate rely on a diversity of independent voices and organizations around the world. Civil society organizations (CSOs) provide this creative and dynamic link between the governing and the governed, and the Open Society Foundations believe they are the best, most essential vehicle for long-lasting progress. However, evidence shows that most existing funder practices and grantmaking aren't enough to build healthy and resilient civil society organizations that can respond to the challenges they face, enhance the impact of their work, and continue long after funder priorities shift elsewhere.



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Our sector has unfortunately viewed investments in organizational leadership and infrastructure as extra or outside of the core work of the organization. Designating funds for these purposes helps overcome those barriers.

**Linda Baker, Director, Organizational Effectiveness and Directed Grantmaking, David and Lucile Packard Foundation**

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In terms of CSO's own spending priorities, it's easy to see how investments in organizational health come low down the list given the pressure they're under to justify their overheads, expand their programming, and generally do more with less. Multiyear, general operating support, while extremely valuable, often doesn't enable organizations to invest in themselves. Instead, research and the experiences of peer-funder efforts, like Ford Foundation's Building Institutions and Networks (BUILD) initiative and organizational effectiveness programs at the William and Flora Hewlett Foundation and the Packard Foundation, show that providing **optional, supplementary, dedicated funding that targets organizational health explicitly gives grantees the focus, resourcing, and accountability they need to prioritize key organizational issues.**



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You're busy fundraising so much, you don't have time to sit down and really develop the organization and if you do, it's to the best of your ability. In my [case] it wasn't enough; I was trying but didn't know how.

**OHF grantee**

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The idea of creating a dedicated fund for organizational health initially seemed to run counter to the spirit of the Economic Justice Program’s grantmaking principles, which prioritized flexible core funding. But, consistent with other evidence, we could see grantee partners using this flexible support as a triage mechanism to fill gaps or expand programming rather than investing in vital but less time-sensitive, urgent, or obvious organizational needs. As Organizational Effectiveness Officer for Hewlett’s Effective Philanthropy Group Jennifer Wei told us dedicated, supplementary funding provides organizations with “cover and permission for making these investments, rather than competing against a host of other organizational priorities.”

After much internal debate and drawing inspiration from our peers, we established EJP’s Organizational Health Fund (OHF; see Box 1) to offer additional, demand-driven support to existing grantees with specific, short-term capacity gaps, organizational challenges, or unexpected needs—from strategic planning to people development, from finances and fundraising to governance, and beyond. We planned to revisit this premise, and our original fear around the contradictory nature of project support in a team committed to flexible core grants, in an evaluation after the third year of funding.

We remained committed to the principle that our grantee partners know their needs, and what will and won’t work for them, better than we ever could: grantee partners would identify their goals and own efforts to advance them. The OHF was optional, additional to existing funding, and informed by evidence and a “grantee-first” ethos. It would support a diversity of partners, approaches, organizational sizes, and geographies, but with an eye to enhancing equity in the field. The fund was created as a pilot and hosted by EJP’s Strategy & Impact Unit.

### **Box 1: Why organizational “health”?**

Our choice to use the term “health” in describing the fund was deliberate. More commonly used terms, like “effectiveness” and “resilience,” are externally defined; efforts by funders to assess the “effectiveness” of an individual organization with easily captured outcomes oversimplify the complex process of social change and, privileging some definitions of “success” over others, they can systematically favor larger, more institutionalized (usually white-led and often Global North-based) organizations.<sup>1</sup>

Health, on the other hand, implies a **longer-term, more holistic view**—one that also values self-defined measures and interpretations. Not only this, but the notion of “health” is easy to understand: every person has health and manages it day to day. We found that this **resonated quickly and clearly across contexts** and helped set the tone for jargon-free conversations with partners about their needs. As one grantee in Kenya put it, “You are most able to do activities well to the extent that you are healthy physically... [Similarly your] activities won’t be as effective...unless the organization is healthy.”

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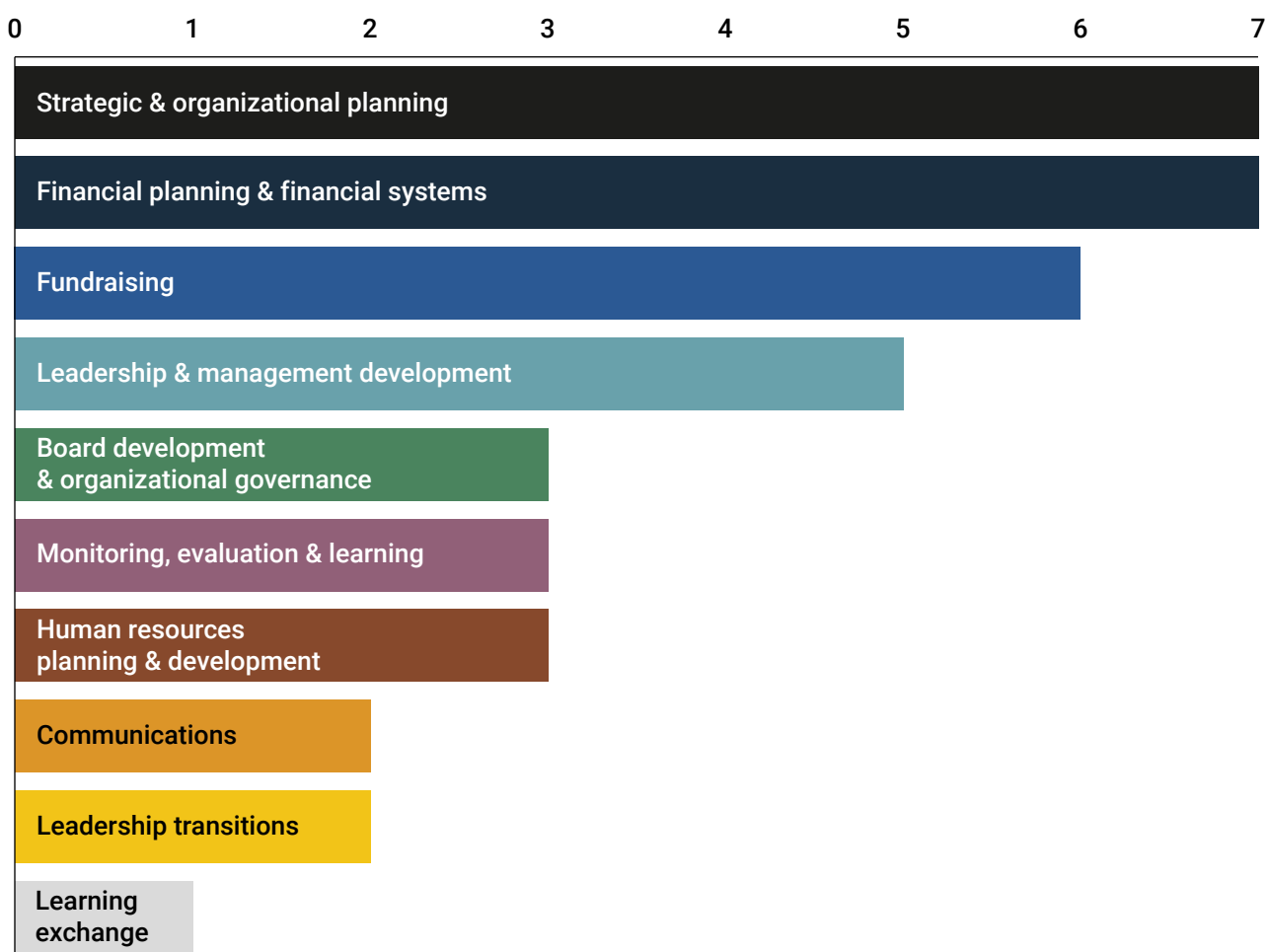
1 [Aspen Institute, 2017. Focusing on ‘effectiveness’ isn’t always effective.](#)

# What did the fund support?

Between 2019 and 2021, EJP provided 14 organizations with a total of \$475,000. Grantees ranged from a small, female-owned transport service in West Africa to US-based research centers. Each grantee received between \$15,000 and \$50,000 for an average intended grant period of one year. The average grant was \$33,000, which was on par with recommendations from other funders. In practice, the actual average grant duration was longer than anticipated (14 months) due to 40 percent of grantees requesting extensions and the COVID-19 pandemic. More than 60 percent of grantees used consultants, with associated costs representing anything from 10 percent to 70 percent (and an average of 44 percent) of these grant budgets.

Most OHF grantees (and EJP grantees) had a global footprint and more than 70 percent of our funding went to these organizations; one grantee organization was regionally focused (Africa) and three were domestically focused (Ghana, Kenya, and Ukraine). Of the 14 total grantee organizations, four were women-led, three of which were women of color, and four others were led by people of color. Grantees could identify more than one organizational health priority: most chose two or three. “Strategic and organizational planning” and “Financial planning and systems” were the most popular priorities, with half of all grantees choosing either one or both as one of their focus areas (Figure 1).

**Figure 1: Organizational health priorities by frequency (# grantees; total 14)**



Leadership and management development was the only organizational health priority shared by organizations at all levels—that is, global, regional, and national. Fundraising tended to be more of a priority among nationally focused organizations than among global or regionally focused organizations, which is perhaps unsurprising given the wide gap in access to funders between global, regional, and national CSOs. Several grants included opportunities for grantees to build out their own revenue streams, with the goal of gaining more financial independence from donors over the long run.

We wanted OHF resources to be available throughout the grantmaking year, and ultimately decided to have three funding rounds (in April, July, and September) with an optional fourth round to distribute unspent program resources. Where we were short on applications for the final funding round of the year, we returned to grant applicants that we had passed over in previous rounds to see if they were still in need of resources. This allowed us to be more responsive and flexible to grantee needs over the course of the year—and to support a wider range of them.



**PRO TIP:** While we recommend a grantmaking period of at least a year, it's important to keep these grants discrete and reasonable, so they don't drag on too long. This is why narrower priorities are also important.

# Stories of success

## At a glance

Due to major and unrelated internal shifts at the Open Society Foundations, EJP’s organizational health funding pilot was cut short, 18 months early. Although we were unable to formally evaluate the fund itself,<sup>2</sup> grantee-reported outcomes and interviews with partners, EJP Program Officers, and the OHF team suggest that the pilot not only contributed to **healthier grantee organizations** but was also **helpful, respectful, and novel** in how it supported greater grantee autonomy.



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In my view [the OHF] had a truly genuine goal of strengthening the organization, regardless of what they do. You need to have healthy [CSOs] capable of holding actors to account. I saw that spirit, and those principles reflected in [the OHF] process.

**OHF grantee**

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Two OHF grantees doubled their fundraising in less than a year. Of these grantees, one increased their overall budget by a third, allowing them to expand their staff by 20 percent in 2020—even amid the COVID-19 pandemic. Four grantees provided specialized training to middle managers to deepen the organization’s leadership bench. This proved invaluable during the pandemic as these managers have played a pivotal role in caring for teams and keeping organizations on track. Two grantees are launching new revenue streams: a database for politically exposed persons; and a course in environmental, social, and governance investing for asset managers in emerging markets. These income-generating initiatives are projected to cover the equivalent of OSF’s annual grant within the first 12 months of operation and a larger proportion of each organization’s budget in future.



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Thanks to the [OHF], we doubled our grants in 2020.

**OHF grantee**

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2 The OHF was expected to run from 2019 to the end of 2021, with an external evaluation in 2022. The Fund was covered in two external program-wide evaluations; however, both evaluations agreed that the reach and scope of the fund’s activities were not enough to perceive noticeable differences across EJP’s entire portfolio of 175+ grantees. However, the fund was cited by both evaluations as an effective practice for organizations that received support and was specifically called out as a useful set of resources as part of an exit package.

According to grantees, this also has **positive impacts for the wider field**, building out new areas of work and engaging new actors that are more likely to survive and thrive in the future. This is particularly compelling because some of the organizations supported via OHF are “anchor institutions”—that is, they play strategic roles in their respective focus areas.



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OSF has invested in ensuring that we are more fundable, and we have the skills to run a good nonprofit. That’s field building.

**OHF grantee**

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Several grantees also noted that their experience with the OHF **equipped them to better advocate for their own organizational health needs**—both internally and with other donors. Even just sharing the OHF application and information with grantees stimulated thinking and conversations that may not otherwise have happened. One partner described how, since receiving the EJP OHF grant, they have requested standalone organizational support from other donors and successfully integrated it into budgets with others. This could have significant spillover effects for the sector, as grantees become more accustomed to requesting this type of support and discussing these types of challenges with their donors.



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**I definitely feel more confident about our organization after the grant...** [It has shown me] what’s possible... I have talked to other donors about organizational health support in reports... We’re now in the middle of a due diligence process from another grant and I actually suggested we have some support [to address the issues it identified].

**OHF grantee**

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Moreover, by exposing the EJP grantmakers to the realities affecting grantees, the OHF also changed how EJP grantmakers approached their assessments—creating a culture of “**mutual responsibility** [between EJP and its partners] which wouldn’t [necessarily] have been there otherwise.”



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Having those conversations [and seeing partners] go through the process [helped us] understand their challenges more specifically.

**EJP staff member**

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## Grantee cases

### Creating a culture of shared responsibility for fundraising

Grantee A, a campaigning and strategic litigation organization with eight full-time staff, was struggling to diversify their fundraising base. They knew they needed to take a more integrated, project-based approach to fundraising (rather than relying solely on the two employees with explicit fundraising responsibilities) but recognized that this relied on developing fundraising and communications skills that were currently lacking among the wider staff. Grantee A used the OHF grant to create a new position

and to hire two expert consultants—one who provided training in project design, planning and monitoring, grant writing, and digital fundraising; and another who developed a donor management database for staff. These changes initiated a **significant shift in organizational culture**: they sparked much-needed conversations about branding and marketing, and generated a new, shared understanding of why fundraising is vital to the organization and its mission – and therefore why it is everyone’s collective responsibility.

### Matching governance structures to ambition

Grantee B, a women-led nonprofit that had expanded rapidly in recent years, felt that governance structures at the top didn’t match up with the organization’s growing ambition and needs. In particular, they were struggling to get enough support and engagement from their board, especially when it came to strategic planning and fundraising. They used organizational health funds to work on gaps they identified

in board development, organizational governance, and financial management, including fundraising. As the Executive Director of the organization explained, “Having an expert come on board to conduct interviews with the board and hear my issues really changed the way I interact with our board. [The board and I] are now jointly developing our strategy, and we were able to **double our fundraising.**”

### Increasing financial independence for greater impact

Grantee C, which educates investors and asset managers on environmental, social, and governance issues, was entirely dependent on donor funds—a risk to their long-term sustainability and their capacity to incentivize wider engagement in their mission. They used OHF fundings to design and launch an engagement portal and a paid-for certification course to equip reform-minded investors and asset managers with the knowledge, tools, and

skills to advocate for improved ethical, human rights, and environmental practices in investment activity. The portal will be a focal point for advocacy by the emerging markets investor community while the course will generate revenue for the organization, **reducing their future dependency on grant funding.** One major asset manager has already signed up. “This [course] is so hugely important” (Grantee C) and would have been hard to finance without the OHF grant.

## Managing tough transitions

The leadership of Grantee D, a network of heterodox, progressive economic thinkers and researchers, had for many years been looking to hand over to a new generation of activists and experts to ensure the organization's continued effectiveness and sustainability. Using the OHF funding, they engaged a consultant who helped them to rethink their model (which relies heavily on volunteers) and relocated its headquarters to a less restrictive funding environment that would allow them to receive financial support from foreign entities. The organization's longstanding founder will soon hand over to a new Chief Executive Officer and further recruiting for paid staff will follow. These changes will make the organization more viable in the long-run. Similarly, Grantee E—a regional network of actors promoting

just, accountable, and progressive tax systems—was preparing for its founder and Executive Director to eventually step down, but had no clear transition plan, few codified internal guidelines, and many new staff—risking a leadership vacuum. The OHF grant allowed them to review and develop their leadership succession plan, governance manual and constitution; create tailored leadership development programs to strengthen the senior management team (SMT); and launch a more inclusive strategic planning process. With the outbreak of COVID-19, Grantee E also developed a comprehensive, living risk matrix to inform senior management decisions. In the grantee's own words: "The crisis showed you need to have the question of risk at the heart of your operations; **putting [...] risk in front strengthens organizational sustainability.**"

## Developing and nurturing people

Grantee F had been experiencing worsening staff morale due to frustrations over workload, lack of career advancement, and the departure (as a result) of key staff. Using the OHF, they hired a consultant to review and help improve its staff development processes, including pay equity and parity, and to build management capacity. The consultant conducted a staff survey, the findings from which informed an SMT training program to improve their

management skills, and enabled senior managers to think more intentionally about how they engage with each other and identify professional development opportunities and incentives for the wider staff. **"It was like having a therapist with a database for analysis,"** joked the grantee organization's executive director. The productive relationship kicked off by OHF grant continues and the grantee is pursuing additional work with the same consultant.



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It was a much bolder, more ambitious, but also more sensible plan than any of us could have made. None of this would have been possible without the OHF, and I say this as someone who was initially opposing it.

OHF grantee

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# What worked

In this section, we discuss a number of factors that we and our grantees identified as contributing to the early successes of the Organizational Health Fund. Underpinning all of these factors were EJP’s good grantmaking practices, values of trust and true partnership, and the belief that grantees know their organization better than we ever could.

## Putting grantees in the driver’s seat

We designed a proposal process that would begin (typically) with an EJP Program Officer (PO) talking to a grantee about the availability of organizational health funding. Often, this would happen because a PO had observed opportunities for a grantee to bolster their organizational health, sometimes during due diligence processes in the course of other grantmaking. Importantly, OHF was never mandatory for any grantee; it was an option that EJP made available but which organizations were free to choose or not.

Several grantees acknowledged that they were hesitant at the outset—some due to previous experiences with more proscribed organizational support, in which consultants or priorities were chosen for them. These grantees appreciated the persistence of their respective PO in encouraging them to apply for an OHF grant.



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I was definitely skeptical [of the process] and have to thank [my PO] for pushing me in to it.

OHF grantee

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It was much more bottom up [than we expected] You would think they would be more structured, more top down... [which made us] reconsider our own thinking about OSF.

OHF grantee

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**PRO TIP:** To give grantees greater confidence and autonomy, we developed [OHF guidance and proposal FAQs](#) tailored to grantees and EJP staff that reduced the need for grantees to approach us with questions.



**KEY ENABLER:** Having an established relationship with a grantee was key given the types of investment and level of partnership needed over the long term. For this reason, we limited OHF support to organizations with two or more years of grants from EJP (or who were in the middle of a multiyear grant)—that is, those with whom we already had a long-term commitment.

Grantees that decided to apply for organizational health funding identified their own organizational health priorities, working with their PO to develop an initial idea and submitting a short, written application of no more than three pages to the OHF committee (see ‘Life of an OHF grant’ on page 23). Once approved, and where the grantee had identified the need to bring on a consultant to advance their aims, **the grantee partner also had full autonomy in selecting this consultant.**

Some grantees asked EJP for input, in which case we provided a list of relevant consultants that had been recommended to us but made clear that we didn’t endorse or recommend them, and that they should be properly vetted by the grantee organization. On one occasion, and at the grantees’ request,<sup>3</sup> the OHF did support a consultant search and made direct payments to the chosen person on the grantee’s behalf. However, all choices and consultancy agreements were made completely independently of the OHF, demonstrating how funders can provide their platform and services without limiting grantee autonomy or leadership.



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It’s not simply respect; it’s listening and paying attention.

**OHF grantee**

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Grantees pointed out that **this approach differed from that of many peers** offering organizational effectiveness support and confirmed that it made them feel more definitively in charge of the consultant relationship and the process as a whole. Several said that this autonomy was the **key to the success of their organizational health efforts**. One grantee explained that they appreciated “the combination of [opportunities for] connection and zero pressure to accept; OSF has such a network and such a bird’s eye view. Not all funders are as driven or do this as proactively.”

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3 They were a nascent organization and would have lost a lot of money in currency conversions.



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[The OHF] always left us a free hand in choosing consultants... and that was critical... My feeling is that they were really listening to the needs and weren't really trying to persuade; they understand the importance of context, of being rooted in culture.

**OHF grantee**

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**PRO TIP:** To clear the way for grantees to get started as soon as OHF resources hit the bank account, we asked grantees to include a costed scope of work for any proposed consultant hire. This approach was recommended to us by peers including Packard and Hewlett, and certainly proved crucial to avoiding the common bottlenecks associated with sourcing and onboarding external experts.

## **Box 2: Seeing the vision, not the imperfections**

To make sure that grantees could be in the driver's seat, they needed sufficient bandwidth to "own" the process. At the same time, the whole purpose of the OHF was to enable organizations to develop their capacity and resilience. For this reason, it was important to focus on the overall vision and the commitment to change.

As grantmakers, we invest in imperfect organizations and people: that's never changing or going away. The emphasis on grantees "performing perfection" to keep resources coming in is a massive barrier to genuine partnership, learning, and impact (see also page 19); instead, the OHF recognized that change, and the people and organizations driving it, are imperfect (and that this is OK).



OSF seems to believe in the changemakers, I felt like they saw the vision, they didn't expect me to be perfect, or expect the organization to be perfect.

**OHF grantee**

## Balancing flexibility and focus

Counter to the common practice in the nonprofit social change sector of always trying to do “more with less,” we often asked grantees to do “**less with more**”—to focus on just two or three priorities over the course of a year (we tended not to accept proposals of significantly shorter duration). Prioritizing needs can be difficult and organizations would typically identify five or more priorities they wanted to tackle within 9–12 months. EJP often acted as a “reasonableness” or “bandwidth” check,<sup>4</sup> encouraging grantees to narrow their focus to three or fewer and even in some cases suggesting that more resources were needed. Of the 14 OHF grants, more than a third ended up with budgets higher than originally proposed (by 35 percent on average) and all final proposals had more clearly defined, more achievable (which often meant narrower) priorities.

We also asked grantees to think specifically about how they would “complete” the process for an identified priority within the grant time frame. For instance, if a consultant was being asked to produce a report with recommendations, we wanted the grantee to build in to the budget and the timeline dedicated staff time to respond to, refine, and implement these recommendations. This **rigorous, questioning approach** surprised and delighted many grantees. Moreover, greater focus and rigor did not come at the expense of flexibility, and it was the combination of the two that grantees found especially valuable.



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It was helpful that OSF combines that openness and flexibility and grantee-driven approach in terms of the needs, with asking a lot of questions to make sure grantee has thought through goals [and] whether this will accomplish those goals. We’ve gotten OH funding from [other funders] and that experience wasn’t as rigorous and translated to the outputs not being as useful, since, as grantees we hadn’t put as much thought into it as we could have. It’s good to have donors push us and hold us to account [in this way].

**OHF grantee**

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At some point I worried we were not spending as much as we should, but I didn’t feel a sense of pressure from them, as we simply asked to adjust the timeline and [it was] rapidly approved.

**OHF grantee**

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4 EJP played a purely advisory role, offering views on the likely trade-offs of choosing one priority or another for example; we did not make or impose decisions.

**Flexibility remained a key principle throughout the OHF grantmaking process.** This was especially important given the commitment to being grantee-led and the nature of investing in processes, which as one grantee put it “needs to be open ended, [with goals that are] more qualitative.” Budgetary decisions were left to the discretion and judgement of grantees, an approach that we made absolutely clear from the outset and in all our ongoing guidance to and discussions with grantee partners (Box 3). Organizations could include staff time as a part of the funding and were able to use the grant to fund things like equipment provided it contributed to organizational health, and the grantee incorporated appropriate training and other factors to ensure sustainability. We actively discussed allocations when finalizing the budget (and throughout the life of the grant) but generally encouraged “big” or “biggest” budget categories on proposals to minimize compliance-related review of small line items and to give grantees greater discretion when it came to using the funds.

This flexibility with respect to priorities and budget equipped grantees to make sound and necessary adaptations and was even more important during the upheaval and unrest of 2020, allowing organizations to safeguard their missions and staff. For example, Grantee A was able to shift savings from budgeted travel to research into the impact of COVID-19 on the community they represent and interventions to provide these people with support.

### **Box 3: Providing budget flexibility**

Email excerpt (emphasis per original):

**From:** <EJP>

**To:** <Grantee A>

**Subject:** RE: Grantee A Organizational Health application

...

You only need to send over justification if you want **to move money from any existing line item of your budget into a line item that does not already exist**. For these, it's best to give us a head's up so we can understand a bit more, but we will largely defer to your judgement. We don't need you to do the full variance reporting for these cases—just a note about how much money you want to move, from where, and to what is enough [for us to make the approval]! However, if you want **to move money between existing line items**, consider this blanket approval to reprioritize these resources at your discretion. You don't even need to let us know until it's time to submit the reports, when you explain any variances.

## Keeping things simple

Once the final scope and budget was agreed between the grantee and the OHF Committee, the OHF team issued a grant letter and payment. From this point until the end of the grant period, the grantee organization took efforts forward; by and large, EJP did not request or require interim updates though we did endeavor to communicate our availability to provide support or to discuss anything at any time. Of the 14 grantees, 8 took us up on this offer.

When grantees requested no-cost extensions or wanted to reestablish or refocus priorities, (which often involved shifting funds to other areas) it would occasionally trigger a check-in between the grantee and the OHF grantmaker. Any such changes could be communicated simply, without the need to complete a form or a template (Box 4). And in most cases, the OHF team accepted requests at face value, providing quick and unequivocal approvals by email that aimed to give grantees the necessary “cover” to make changes (Box 3).

### Box 4: Making updates easy

Email excerpt:

**From:** <EJP>

**To:** <Grantee G>

**Subject:** RE: Nomination of Grantee G for organizational health fund

...

In terms of a form/template, there isn't one. We encourage you to use a simple budget table (say one you use to prepare other internal documents or budget materials) to show what was outlined in the initial proposal versus the actual expenditures.

We also kept final reporting requirements simple and functional, and asked that each report was no more than five pages or 20 slides long. The OHF team provided [a template with a set of basic questions](#) that focused as much on the grantee's journey as the outcome; we also accepted reports in other formats at the grantee's request. The final question in the OHF template emphasized learning—both for the individual grantee and the field: “What advice would you give to other organizations seeking to implement similar changes?”

Learning and reflection on all sides was also a core focus of close-out conversations between the OHF team, grantees, and their usual EJP POs, which were organized as the grant was winding down. These discussions were an opportunity for EJP's OHF team to hear about the grantee organization's achievements, their experiences, and their feedback on the OHF pilot itself. Close-out conversations were often forward-looking as well as reflective and often revealed a significant shift in thinking about organizational health as executive directors shared what they saw as the next steps (and demonstrating perhaps increased enthusiasm and commitment in organizational health issues).



## Keeping things separate (and accountable)

Providing a separate fund for organizational health, distinct from the grantee's primary OSF grant, encouraged grantees to be more deliberate about their organizational health priorities and to stay accountable to them amid other competing demands. This issuance of separate, earmarked funding for organizational priorities was one of the main hypotheses driving our pilot (i.e. organizations had a hard time finding room for these things in their existing core funding). When we asked grantee leaders at the end of their respective grants whether they would have preferred to receive organizational funds within their standard OSF grant, most said no.



I like that it's a discrete grant with its own budget and reporting, due to competing demands within an organization.

Leader, OHF grantee

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Most grantees have limited funds and a lot of interests, so OHF-type activities often take a back seat. It's useful to have OHF funds separated out [from general support] because there's that rigor to have it reported on: what have we accomplished with this, what are the next steps...[and it also] means we have to agree as a team on the priorities for using the funds, [which] helps bring a bit more cohesiveness. **Pretty much any other thing I would say wrap it into core funds, but for us and for this type of grant I very much like having it more discrete.**

Leader, OHF grantee

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I strongly feel it should be separate, especially for a cash-strapped organization like ours. Everyone is wary of spending money on managerial costs...if we had gone to the Executive Committee and said we want to spend [this amount of core funding] on this, they would have said no...whereas if you have a grant for it there are no questions asked.

Leader, OHF grantee

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OHF work was hosted and run by EJP's Strategy & Impact Unit. Both grantees and program team members also appreciated **having a separate team, distinct from program POs, with the mandate and expertise** to help grantees design the right-sized scope and think through the necessary steps to tackle their organizational health priorities. However, as we discuss in the 'Lessons learned' section, program POs continued to play a key role in supporting the organizational health of grantees.

#### **Box 5: Having the right mix of skills to manage the fund**

The Strategy & Impact Director (who was also the lead OHF grantmaker and co-chair of the OHF Committee that reviewed applications) was already working directly on strategy, organizational health, and evaluation and learning, in her EJP role, and was in regular contact with many of EJP's grantees. The other OHF Committee co-chair was a Program Operations Officer; this operational focus and skill set were a real asset to the Committee specifically and to the OHF overall. Having an embedded technical staff that were deeply familiar with EJP strategy across portfolios and an existing platform of trusted, demand-driven grantee support enabled an easier "start-up" for the OHF. Combined with the strong values-driven work of EJP's Strategy & Impact Unit, the rigor of the approach, adoption of evidence-based practice, and accountability to values were significantly helped by the team's skill set and purpose.

# Lessons and recommendations

## Accountability isn't a bad thing when it's a partnership

So often, accountability between a grantee and a donor is performative. A grantee sends off a report that details perfectly attained targets (even if this doesn't reflect what played out) and a thorough run down of spending. In this, no one is truly being held accountable to the things they've set out to do, nor is anyone truly reflecting or learning to adapt for greater future impacts. It also feels very one-way, with donors demanding accountability from grantees and very little going on in the other direction.

Part of the challenge is the fact that power dynamics and incentives within grantmaking and reporting are unbalanced, with grantees wanting, as one partner explained, to always “show your best” because you're “always concerned with funding.”



The problem is when you're stuck in your work, you're always concerned with funding. Any donor says it's about the relationship, the question is *how*. You need to be able to discuss the difficulties that often you are shy to raise because you want to show your best. I was very surprised that OSF, as a big donor, wanted this kind of informal relationship and real understanding of where the organization is going.

OHF grantee

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As (some) donors look to put grantees in the driving seat through more flexible approaches that prioritize partnership, the idea of accountability to a set of agreed targets or commitments can seem out of place. But accountability is a feature of effective partnership: **a good partner helps you to set and be accountable to your own goals—and this accountability should also run both ways.** Feedback from grantees and EJP staff suggests that the OHF fund was successful in doing this.



They got us thinking straight in a way that maybe we should have five years ago.

Leader, OHF grantee

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The fact that OSF was not colonial about it made a very big difference. Our experience has been not just extremely positive, but unexpectedly so and I think a lot had to do with the people we were doing it with... [and that] combination of understanding but also [being] strict, and supportive in the right ways. The people involved in giving the grant offered useful feedback during the proposal process, so it did feel like a thought partnership. You can smell it when there's a degree of patronage and there was none of that.

OHF grantee

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### Box 6: Promoting (mutual) accountability

1. **Lead with principles and openness.** Communicate to grantees about why you're providing this type of support, what it will involve (requirements), what it might mean (implications), and any impact it could or would have on future grants.
2. **Offer options and frame choices; don't make them.** When a grantee submits a multitude of priorities (more than could reasonably be prioritized), offer both guidance on the benefits of greater focus and input on the possible tradeoffs of different choices. Make this type of support throughout the grant, but also be okay with staying out of their way.
3. **Emphasize the journey as much as the outcomes.** Whether during check-ins or the final report, ask grantees about the process, culture, and bandwidth for organizational health. Remind grantees that you're committed to their organization and the changes they're working to implement. Consider sharing experiences of your own similar challenges or experiences, to emphasize the universality of organizational challenges.
4. **Collect feedback on your performance and the relevance of the support;** don't assume it's working. We used several different opportunities to collect this kind of feedback including in the final report and conversation and via external evaluations and reviews.

## One tool within an ecosystem of good grantmaking practice

The OHF was especially suited to organizations with capacity and resource gaps that were standing in the way of efforts to improve health, operations, and other internal needs. But it was not the only avenue that EJP used to support the organizational health of its grantees; the fund was one tool operating within a wider toolkit of approaches, including flexible core funding and technical accompaniment and guidance. We also sometimes worked with other funders to coordinate support for organizational health, a process that grantees enabled and endorsed, and built on existing relationships and trust between the two funders and each grantee, respectively.

Moreover, the fund itself connected grantees to different forms of support. This was facilitated by the fund's "grantee-first" ethos. For example, one grantee explained that, after having security issues, OHF offered them the chance, "to be part of a pilot on security training [implemented by another grantee organization]—something we were not requesting but they were offering. They detected this by talking to us. In my view that proactive stand is what a good PO should offer."

According to a recent external evaluation of the Fiscal Governance Program (which was latterly merged with another program to form EJP and retained many of the same relationships, principles, and practices), grantee partners especially value this **mix of financial and technical organizational health support** and said that strategy advice and consultation, in particular, helped them think about their own long-term sustainability.

## Trust and openness are essential

The fact that we had supported many of these organizations for several years prior to suggesting organizational health support meant that grantees mostly trusted and knew they could be frank and open with us. In cases where we didn't know the organization as well, we tried hard to set the stage early for trust, flexibility, and being guided by their discretion. Grantees described how game-changing it was for them to “be able to **sit with a donor and tell them you're struggling and not worry that you'll be penalized for it.**”



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[We felt the OHF team's] trust and flexibility; there are few other donors (if any) where we would risk making a reallocation without prior formal approval. We appreciated such [an] approach a lot. It allowed us to focus more on the main results more and less on the formalities.

**OHF grantee**

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When we began designing the OHF, peer funders like Ford and Hewlett recommended having a “firewall” between program grantmakers/POs and organizational health grantmakers/POs. The rationale was that OHF grantees would feel more comfortable discussing institutional challenges without the risk that they might jeopardize their program funding. We followed this approach in the OHF's first funding round, but found over time that it made less sense in our context—perhaps because OHF staff were already embedded directly in the program or, perhaps, because of the types of relationships, messages, and conversations we prioritized with our grantees.

Strong grantee—PO relationships and existing trust meant that few, if any, of the internal organizational health struggles raised were ones that POs didn't already know about; although POs were not directly involved in management and oversight of OHF grants, they often covered organizational health topics in routine check-ins with grantees on their other grants. Grantees themselves would often bring their POs into copy on OHF-related communications to keep them in the loop and over time, we relaxed (or gave up on?) the “firewall” rule. POs were always made aware of our final report conversations, initially (in keeping with the firewall) without an explicit invitation to participate. As the firewall was relaxed, the OHF team would ask program POs if they wanted to join,<sup>5</sup> which sometimes they did, depending on availability and other priorities.

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5 Provided they kept to reflections on organizational health funds.

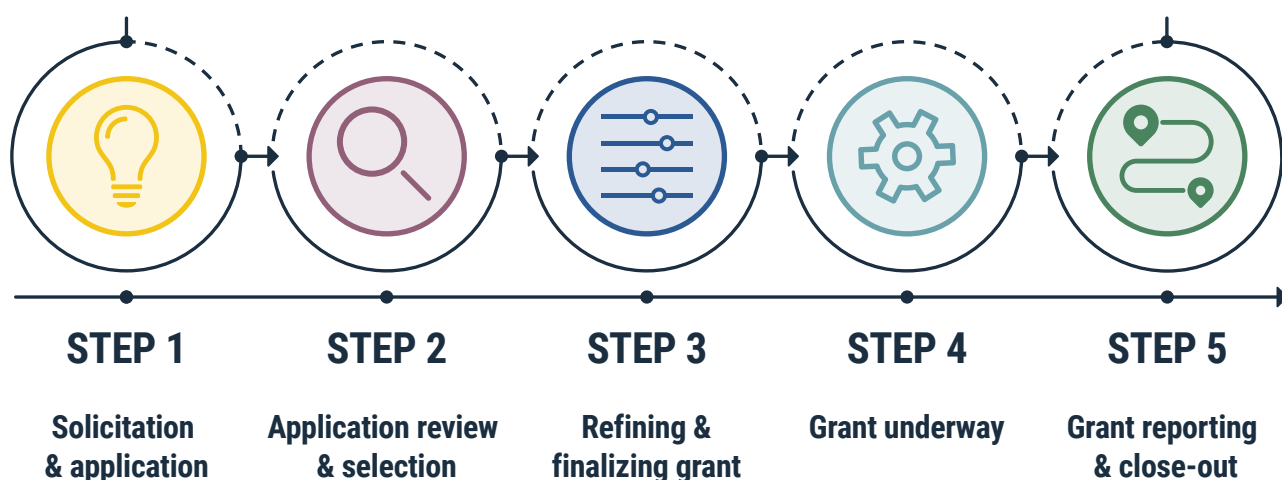
# The life of an OHF grant

**Grantee Applicant/Grantee:** Existing EJP grantee with two or more years of grants from EJP (or who are in the middle of a multiyear grant)

**EJP Sponsor:** Member of EJP (typically a PO) who is a grantee's main point of contact

**OHF Committee:** One permanent chair (EJP Director of Strategy & Impact) plus three rotating members from the EJP team (of different positions and seniority levels)

**OHF Lead Grantmaker:** Member of EJP's OHF team (within the Strategy & Impact Unit) making the OHF grant



## Step 1: Solicitation & application

- EJP team member (“EJP Sponsor”) discusses availability of organizational health funding with Grantee Applicant
- EJP Sponsor shares with the Grantee Applicant the OHF guidance, which includes an overview of the fund, the grantmaking process, and FAQs
- Grantee Applicant identifies, and works with EJP Sponsor to develop, their organizational health priorities, with reference to the OHF guidance
- Grantee applies for funding using the Organizational Health Fund OHF application form



## Step 2: Application review & selection

- OHF Committee review and score the application using the [scoring rubric](#) and share detailed feedback with Grantee Applicant



## Step 3: Refining & finalizing grant

- Grantee Applicant makes decisions on where and how to narrow
- Where needed, Grantee Applicant identifies a consultant, and drafts a scope of work and work plan
- OHF Lead Grantmaker and Grantee Applicant agree on final scope and grant budget
- Grant letter issued and countersigned
- Payment goes out and implementation begins



## Step 4: Grant underway

- OHF available to Grantee throughout the life of the grant
- Grantee makes grant pivots or adjustments along the way
- OHF provided supplementary advice on request



## Step 5: Grant reporting & close-out

- No more than 90 days after the grant ends, the Grantee submits to the OHF team a grantee report, using the OHF [reporting template](#), to describe their process and learning
- OHF request a close-out conversation (EJP Sponsor sometimes included/invited)
- Final report shared internally with other relevant stakeholders
- Grant is closed in OHF systems



## Example timeline from an OHF grant

The following timeline provides an overview of how the OHF grant played out in practice for one of the fund's grantees.



### Step 1: Solicitation & application

#### November 2019

PO managing grant meets with grantee Executive Director to update their organizational assessment. In the previous year, PO had noted an inactive board as an organizational health issue that they planned to keep an eye on.

#### December 2019

Grantee and PO work together and grantee submits a proposal to the OHF for (1) board development and organizational governance, (2) fundraising, and (3) financial planning and systems, including a scope of work for a financial management and fundraising consultant and background on a potential candidate.

PO submits an accompanying sponsorship form,<sup>6</sup> emphasizing challenges with the board, as well as the importance of improved financial systems to ready grantee for potential new funding related to an upcoming event.



### Step 2: Application review & selection

#### January 2020

OHF Committee shares detailed feedback with grantee, noting that the proposal identifies eight areas of work, and asking Grantee to narrow the scope to two, or a maximum three, projects with some high-level reactions to the tradeoffs or importance of some areas versus others for the grantee's consideration.

Committee also offers to connect Grantee with another EJP grantee and OHF recipient working in the safe transport space who had prioritized fundraising and fundraising materials in their grant. The two met to share tips and advice.

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<sup>6</sup> Initially, we asked all POs to submit an accompanying sponsorship form, but we waived this in our second year in response to feedback about the added workload for POs. Some POs still chose to complete it; others provided shorter comments on the proposal and any other useful background information about the grantee organization (e.g. upcoming leadership changes).



## Step 3: Refining & finalizing grant

### February 2020

OHF offers to connect Grantee with a fundraising consultant used by another OHF grantee and a list of other consultants, noting they are free to use the consultant noted in their initial proposal.

Grantee submits revised proposal and budget, including consultant terms of reference and CVs for fundraising and board development consultant (they chose to use a locally based consultant).



## Step 4: Grant underway

### March 2020

Grantee grant is approved in the amount of \$42,000 (the same amount initially requested) from April to September 2020, with a no-cost extension granted through June 2021.

### October 2020

Grantee requests approval to extend the grant for six months (no-cost extension); changing final end date to April (from September 2020).

### April 2021

Grantee requests approval to change budget and reallocate unused travel funds due to COVID-19 and proposes to reallocate them to updating their understanding of how to best support women's transport needs during the pandemic; OHF team sends email approval providing permission for a wide range of budgetary changes at the discretion of the Grantee's Executive Director, guidance on how to make them work given compliance requirements, and confirmation of an additional three months no-cost extension (final end date moved to July).

### May 2021

Grantee's Executive Director shares a run-down of costs that they plan to move or add. All approved.



## Step 5: Grant reporting & close-out

### July 2021

OHF staff conducts a close out call with Grantee to capture lessons learned.

Grantee is able to double their fundraising just one year after getting an OHF grant. Some other key results include:

Before the OHF grant	Outcomes of the OHF grant
Board in place but not functional or diverse, and there are no clear roles	Board now fully functional; reflects the organization's needs, values, and priorities; meets regularly; and members have clear, documented roles
Not clear how the board and staff interact	Guidelines on staff-board engagement developed
Lack of coordinated fundraising approach	Undertook a comprehensive analysis of fundraising opportunities and materials, and updated the prospective donor list

# Organizational Health Fund application form

This [solicited application] is for approved Organizational Health Fund ideas only. Before starting it, you should have agreed to a clear idea for a project with your primary [EJP] grant point person (typically, an [EJP] Program Officer).

Although your [EJP] Program Officer will stay in the loop on this work, they will not be your primary contact for this grant—instead successful Organizational Health Fund applicants will liaise with appointed members of [EJP's] Organizational Health Fund (including another PO) who will schedule some informal check-ins over the life of the grant to hear about implementation progress. The grant's implementation and timelines will be treated separately from any existing grants with the program meaning separate financial and narrative reports. We have attempted to make these as succinct and minimal as possible and agree to provide regular updates to your primary [EJP] contacts.

In developing this proposal, you are encouraged to reach out to [EJP] with questions or ideas along the way. If part of the project includes working with a consultant, we leave this selection completely at your discretion. If this application is accepted, you will need to provide a more detailed budget document, workplan, and, if relevant, consultant CV materials. These are **NOT** required as part of the application at this stage.

**Instructions:** In no more than **3 pages** (excluding work plan and budget annexes), please provide us with the following information

# Section 1: Project design

Select all that apply

Organizational Health Fund support areas	
<input type="checkbox"/> Board development & organizational governance	<input type="checkbox"/> Human resources planning & development
<input type="checkbox"/> Communications	<input type="checkbox"/> Leadership transitions
<input type="checkbox"/> Digital & physical security	<input type="checkbox"/> Leadership & management development
<input type="checkbox"/> Diversity, equity & inclusion	<input type="checkbox"/> Monitoring, evaluation & learning
<input type="checkbox"/> Fundraising, financial planning & financial systems	<input type="checkbox"/> Strategic & organizational planning
	<input type="checkbox"/> Other, please specify: _____

1. **Summarize the organizational health challenge, issue, or opportunity** you intend to tackle and why—including any special circumstances or changes that have caused a need for a focus on it at this time.

2. **Describe the proposed project including the timeline, relevant activities, and intended outcomes** (ideally 2–5 outcomes).

3. **Discuss the project rational.** How or why will this project enhance the effectiveness of your organization in addressing the organizational issue described.

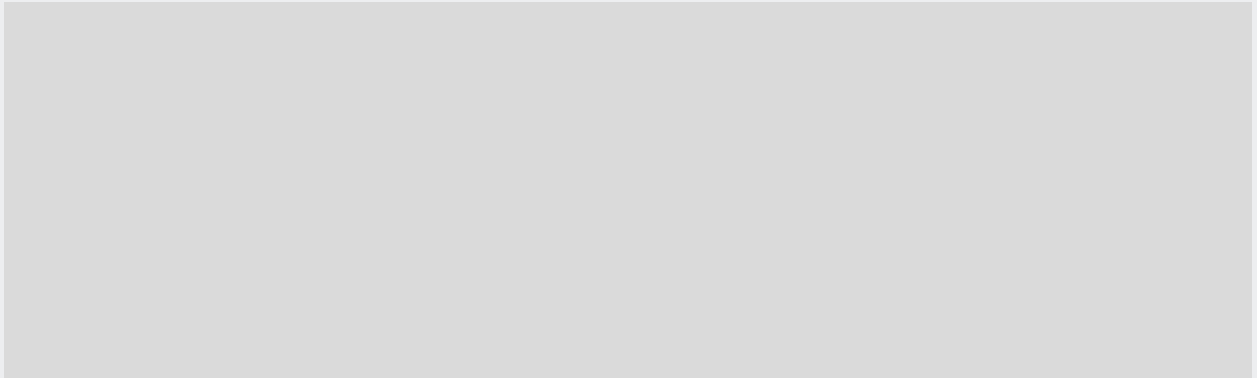
4. **Describe any risks or concerns** with implementing the project and how you plan to mitigate them.

5. **Consultant:** Will this project require collaboration with a consultant? If so, which part(s) of the project will be implemented/led by consultant? (It may be the entire project). If possible, name one or two consultants your team might select for this work.

**Note:** Successful projects requiring a consultant will need to submit a consultant CV and work plan at a later date; [OSF] can provide recommendations if asked but will not be involved in selection.

## Section 2: Project management & budget

1. **Identify the internal project lead** (must be organization staff or board member) and list other champions who will be involved.



2. **Provide current fiscal year budget:**

- a. Comprehensive **organizational expenditure budget** for the current fiscal year (or the fiscal year during which the project will be executed), disaggregated for all major categories of expenditure and activity as well as funding sources

- b. Current **revenue**, including secured and anticipated sources of income

3. A **high-level project budget** representing estimates for undertaking this work. If a consultant will be involved, please provide a rough breakdown for the consultant fee vs funds that will be applied to organizational costs. Successful applicants will be required to submit a more detailed budget at a later date. **Note:** The total distribution of funds to a consultant can be **anywhere** from 0 percent to 100 percent of the overall project.

*Continued overleaf.*

## Section 3: Monitoring, evaluation & learning of OHF grant

Using the 2–5 high-level outcomes described in Section 1 Question 2, identify 1–3 indicators per outcome (i.e. describe how your organization will understand whether progress towards these outcomes has been achieved) and how these indicators will be tracked.

Use the table below (or something similar) to submit these outcomes, along with your strategy for tracking them—what we call your “MEL Plan.” All MEL plans **must** include outcomes, associated indicators, and means of verification for these indicators. All other columns are optional.

Please consult [EJP’s] **MEL Plan Proposal Guidance** document for more information on how to complete this section. Members of the EJP team are also available to discuss and support this process.

Indicator level	Indicator	Baseline (Year)	Target (Year)	Means of verification (collection method & data source)
Outcome 1:				
	Indicator 1-A			
	Indicator 1-B			
Outcome 2:				
	Indicator 2-A			
	Indicator 2-B			
Outcome 3:				
	Indicator 3-A			
	Indicator 3-B			
Outcome 4:				
	Indicator 4-A			
	Indicator 4-B			
Outcome 5:				
	Indicator 5-A			
	Indicator 5-B			

# Organizational Health Fund application scoring rubric

Grantee applicant organization: \_\_\_\_\_ [EJP] lead: \_\_\_\_\_

Category	Category explanation	Score	Justification
Rationale (1–5)	Is the need clearly explained? Does the project seem to tackle a clear, compelling organizational health issue?		
Need (1–5)	Is it clear why the grantee can't or won't use EJP's existing grant to the organization to pursue this need? What about making use of their other funds or resources?		
Internal buy-in (1–5)	To what extent is the organization prepared/ready to make use of these resources and integrate its outcomes into practice?		
Field-building intent (1–5)	To what extent does or could this organization play a wider role in advancing their particular field? Will strengthening or resolving this issue affect the larger field in which this organization is situated?		
The "Underdog factor" (1–5)	Is this a newer organization or a smaller one? Does it enjoy general support funding from any (or many) sources or is it restricted to project budgets? Where is the organization based and who does it employ?		
BONUS (+2)	Is the requesting grantmaker contributing funds too? What about grantee?		
PENALTY (-1)	Organization has previously received organizational health fund grant (in last two years)		
<b>TOTAL</b>			



# Organizational Health Fund guidance (abridged)

*This is an abridged version of the EJP Organizational Health guidance. Sections marked with an asterisk (\*) were only included in guidance to internal EJP staff.*

## Fund overview

This fund is designed to provide additional, demand-driven support to existing [EJP] grantees with specific, short-term capacity gaps, organizational challenges, or unexpected needs. Funds can be used to strengthen and support a wide range of internal systems and processes.

[See full list under Tool 1, page 29]

## Fund principles

- Projects must be demand-driven with a clear articulation of the need from the grantee
- The grantee drives project implementation and owns effort
- The fund will not promote the use of any particular consultants, methodologies, or tools
- The fund aims to advance [EJP] values of diversity, equity, and inclusion by supporting a variety of partners, approaches, organizational sizes, geographies

## Fund practices and rules

### Who can apply

- To apply, the organization must be an existing [EJP] grantee that has been an [EJP] grantee for two or more years or is a current recipient of a multiyear grant from EJP
- The organization must have a current up-to-date eligibility assessment (this applies even when [EJP] isn't the lead funding entity)
- The organization must have commitment and bandwidth to take on the project

## What can be submitted

- The idea should have been discussed by and agreed between the grantee and relevant grantmaking staff
- The project must fit squarely into an organizational health concern and issue (i.e. it must not be tangential or a partial fit); it may be related to either C3 or C4 activities
- The project should be short-term (18 months or less) with clear objectives
- When significant, requests may cover staff time that will be spent working on the project
- A single idea may not be submitted more than twice (i.e. if unsuccessful on the first application, the same idea may only be submitted once more)

## Application review and selection

The Organizational Health Fund Committee will review applications using the scoring rubric. Applications must be submitted to the OHF Chair 10 days before the quarterly OHF Committee meeting. As outlined in the application form, contracts and any type of grant will be considered.

## Organizational Health Fund Committee considerations<sup>7</sup>

The Organizational Health Fund (OHF) committee is comprised of four rotating team members (in various positions/levels) in the Economic Justice Program and one permanent chair (EJP Director of Strategy & Impact). The OHF Committee uses a predetermined rubric to evaluate each submission. In reviewing applications, it will take into account the following:

- Whether primary grantmaking staff or the grantee will also contribute funds (i.e. where other funds will be committed, this will be viewed **more favorably**)
- How much of a priority or how urgent the need is (i.e. organizational survival vs organizational enhancement)
- The type of grant or support, which should be appropriate to the specific project and give the grantee as much autonomy as possible (i.e. **strong preference** for grants over contracts)
- Whether the grantee is already receiving general support funds from [EJP]; if the grantee is already receiving general support funds from [EJP], the application should provide a clear and convincing argument as to why the grantee can't or won't use these existing funds
- Whether the grantee has previously received support from the OHF (i.e. these applicants will be considered **less favorably** in the selection process)
- Where an OHF Committee member is a grantmaker and wishes to sponsor a grantee that they already directly fund, they may submit an idea to the Committee but must recuse themselves from that review and selection period

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<sup>7</sup> OSF's thinking around the "one-third threshold" is not a relevant factor in OHF decision-making.

## Timeline for decisions

The OHF Committee meets up to four times a year to discuss submissions (towards the end of each quarter). The committee tries to spend down the bulk of available funds in the first three quarters and will only consider applications in the fourth quarter if funds are still available.

<b>2020</b>	<b>Solicitations</b>	<b>Applications due</b>	<b>Committee review, selection &amp; feedback</b>	<b>Grantee revisions/final proposal due</b>
<b>Round 1</b>	Nov 6	Dec 4	Dec 11	Jan 15
<b>Round 2</b>	Mar 4	Apr 15	Apr 24	May 2
<b>Round 3</b>	Jun 3	Jul 15	Jul 24	Aug 21

## How to submit a proposal

Proposals must be solicited by the grantee's main [EJP] of contact (typically a Program Officer). This person acts as the nominator and internal sponsor for the idea before the OHF Committee.

Before proposals are even requested, the Program Officer will work with the grantee to sketch out an idea and budget for a project to go before the committee. If selected, a request for a proposal will follow which includes a short description of the intended project and a consultant work plan.

Unsolicited proposals are not currently accepted.

## Organizational Health Fund Committee\*

The OHF Committee will be comprised of five [EJP] staff members: two permanent and three rotating members. The two permanent members will be the EJP Director of Strategy & Impact, who will chair the fund, and a Program Administrative Specialist, who will assist the chair. Votes count equally for all OHF Committee members. In the event of a tie (due to a recusal of a member), the tie breaker will be a former OHF Committee member, chosen at random.

Rotating members will be selected via solicitation of interest or, if interest exceeds or falls short of needs, by random lottery. All rotating members serve for one full term (of one year from December 1 to November 30), with an optional extension of one cycle and the possibility of rejoining after a 12-month break.

All OHF Committee members are expected to:

- attend all application review meetings;
- review all applications and most recent eligibility assessments of those organizations prior to meeting;
- abide by the selection criteria and provide clear justification for decisions.

The two permanent OHF Committee members will:

- chair application review meetings;
- conduct the annual lottery for OHF Committee membership;
- work with POs and others on the final design of approved projects;
- adapt process, templates, and procedures as the fund matures and better practices emerge;
- aggregate lessons from individual projects and share these regularly with program staff.

## Illustrative timeline and tranches (based on 2020 plan)\*

Fund total: \$300,000

	Quarter 1	Quarter 2	Quarter 3
Amount	Up to \$120,000	Up to \$100,000	\$80,000 (plus any remaining from Q1 and Q2)
Application due	Dec 4	Apr 15	Jul 15
Review & selection	Dec 11	Apr 24	Jul 24
Final proposal	Jan 15	May 22	Aug 21
Compliance	Jan 31	Jun 5	Sep 4

## Frequently asked questions

*The following frequently asked questions were included in the guidance for grantees.*

### **Q: Can an OHF grant be combined with my other OSF grant?**

A: No, we are explicitly keeping OHF grants separate, which is consistently described as best practice by other funders with health/effectiveness grantmaking programs. That being said, we are conscious of the administrative burden that an additional grant can cause and are doing our best to minimize this (e.g. in reporting requirements and expectations) while still keeping the grant separate.

**Q: Do we have to have a consultant identified in order to apply?**

A: We recommend you have a consultant identified, even if they are not confirmed. [EJP] will not identify a consultant on a grantee’s behalf, but we can provide a list of consultants and their areas of expertise. These individuals are not endorsed or recommended by [EJP or OSF] and should be properly vetted by the grantee organization.

**Q: Can OSF pick the consultant for our organization?**

A: We will not pick the consultant for the grantee organization. We want the grantee and consultant to be the right fit, and do not feel that we can make this decision on the grantee’s behalf. If requested, we will provide a list of consultants and their areas of expertise. These individuals are not endorsed or recommended by [EJP or OSF] and should be properly vetted by the grantee organization.

**Q: Can OSF hire the consultant for our organization?**

A: No, we prefer this relationship to be between the grantee and consultant. In extenuating circumstances, we will issue an “in-kind” grant, but the relationship will be between the grantee and consultant, with no OSF involvement beyond administration.

**Q: Can I apply on behalf of a subgrantee?**

A: No. OHF grants are intended for [EJP] direct grantees only.

**Q: Can we propose multiple activities in our OHF application?**

A: Yes, but we may only be able to fund a piece of it depending on the amount of funds available and whether the activity is an appropriate fit for the OHF.

**Q: Who will manage the grant?**

A: Your OHF grant will be managed by EJP’s OHF team. Your point of contact for the OHF project is different than your Program Officer for your other OSF grants.

**Q: Can advocacy or C4 work be covered by the OHF?**

A: Yes, as long as it contributes to organizational health or effectiveness.

**Q: Can staff time be covered by the OHF?**

A: Yes, staff time can be budgeted for in OHF grants.

**Q: Can equipment be purchased?**

A: Yes, as long as it contributes to organizational health or effectiveness.

# Organizational Health Fund reporting guidelines for grantees

As a recipient of EJP's Organizational Health Fund, we want to understand if and how the funds contributed to evolutions in the health and capacity within your organization.

We recommend discussing the project and its impacts (positive or negative) with your EJP Program Officer as part of the reporting process. The report is due **no more than 90 days** after the close of project, but the official report deadline should be decided in partnership with your EJP Program Officer.

## Financial reporting

Please provide an account of budget actuals against the approved budget of the organization during the grant period. If project budget modifications were approved over the course of the grant, please reflect those changes.

## Narrative reporting

In **no more than 10 pages or 20 slides**, please address the following:

1. Report on progress (or lack of it) towards the identified outcomes for this project [confirm these with EJP Program Officer, if in doubt].
  - Explain any changes or adjustments that needed to happen to the original outcomes over the life of the project.
  - Expand on progress (or lack of it) towards the original outcomes of this project. Help us understand how and why things progressed the way they did.
2. What were the big successes and failures during this period? Were there any major surprises? (Note: these may or may not have been within your control)
3. Briefly describe if and how you plan to implement and/or build on this work in the future. Where possible, provide specific timelines and responsible staff/board members.
4. What advice would you give to other organizations seeking to implement similar changes/work?
  - What should they definitely do? Definitely not do?
  - Would you recommend they work with the same team/consultant? Why or why not?

**In late 2018, the Open Society Foundations made a bold new commitment to fighting economic injustice.**

Through a merger of OSF's existing Fiscal Governance and Economic Advancement Programs, the Economic Justice Program (EJP) was formed and tasked with designing the Foundations' first-ever global economic justice strategy.

Due to changes in OSF leadership, the decision was made in late 2021 to centralize the Foundations' cross-cutting global work, which meant the closure of individual thematic programs including EJP. It is understood that key elements of EJP's designed strategy will be taken forward by a new central unit. Final decisions are likely to be confirmed by early 2023.