

Resource type	Overview	Date created	2021	Last reviewed	2022
Resource series	Seeding innovation, evidence, and grantee-led learning in the economic justice field				
Project	Monitoring, Evaluation and Learning Toolkit for Grantmakers and Grantees				
<div><div></div>MANAGE an evaluation or evaluation system</div>					

Close-out note for the OSF Enhancing Impact for Economic Justice portfolio

This close-out note will be helpful for those looking to:

- ✓ Build grantee and field capacity for better monitoring, evaluation, adaptation, research, and learning
- ✓ Prioritize and elevate grantee resilience and organizational health
- ✓ Design portfolios/bodies of work whose primary function is to advance, enhance, or multiply existing efforts

KEY STATS

Timeline: April 2017 – September 2021

\$4,698,450 in resources disbursed

19 organizations received funds

OSF STAFF

Lead: Megan Colnar (2017–end)

Team: Jay Locke (2017–end), Andrea Azevedo (2020–end), Robin Varghese (2019–end), Caroline Raue (2018–end)

Background

The Enhancing Impact for [Fiscal Governance/Economic Justice] portfolio's central hypothesis—across iterations and major programmatic shifts—**was that greater impact alluded OSF's existing** FG/EJ grantmaking efforts and priorities as a result of key gaps in practitioner and policymaker centered evidence (i.e. what works? And where, how, and why?) and in the field's ability to track, understand, and analyze impact accurately or appropriately. The portfolio started in 2017 as part of the Open Society Foundations' Fiscal Governance Program (FGP). The focus areas for the original portfolio included (1) strengthening field capacity and practice in MEL,

(2) improving FGP capacity to evaluate and learn from its work, and (3) advancing demand-driven and action-oriented research and evidence in the field. When FGP merged with the Economic Advancement Program (EAP) in 2019 to create the Economic Justice Program, the Enhancing Impact portfolio carried on with an adapted scope. The focal areas and rationale of this portfolio's final iteration are described in the following.

Overview of the EI4EJ portfolio

The Economic Justice Program's inaugural strategy aimed to directly confront some of the most difficult, political, and complex issues of our time. We did so knowing that the path towards greater economic justice relies on uniting unlikely coalitions across jargon, sector, and geography, under-skilled and underfunded civil society groups, and major gaps in the evidence base on advancing questions of distributive justice.

To better clear the way for EJP's portfolios and collective work, this portfolio sought to:

- **Goal 1: Enhance discourse and vision**—advance a more cohesive discourse and vision around economic justice within the Open Society Foundations and more broadly in the field;
- **Goal 2: Enhance evidence and practice**—strengthen evidence and practice for pathways to change in economic justice;
- **Goal 3: Enhance grantee resilience and practice**—augment the organizational health and resilience of EJP grantees.

These three goals were used as EJP's amplifying lenses and the main hypothesis of this portfolio, in other words, we theorized that work on these three areas (even at the margins) would help the field and our strategy work to advance, with greater impact, toward EJP's long-term aims to amplify worker power, challenge corporate influence, and promote fiscal governance. Importantly, the portfolio recognized OSF as one of *many* working on these issues and deliberately sought out and supported practitioner and policy-maker voices to set priorities and challenge assumptions.

Notable achievements

1. **EJP's Organizational Health Fund** | EJP launched OSF's first dedicated resource to support organizational health & resilience. In its 2 years, the OHF distributed grants to 15 organizations (totaling roughly \$475,000). The OHF was built using rigorous evidence from other funders' experience (including external evaluations). The practice was also reviewed by external evaluators for EJP in the EAP close-out evaluation and the FGP close out evaluation.

2. **Strengthening MEL capacity of FGP/EJP grantees** | In order to strengthen the MEL capacity of grantees, FGP/EJP (a) convened grantee MEL leads to capacity building workshops in 2017 and 2019 (called “MEL Jamborees”), (b) provided direct technical assistance to grantees on developing theories of change, indicators, data collection plans, and more, and (c) created an open fund for MEL-focused learning exchange ideas brought forward by two or more grantees. Our evaluations indicated that these tools (particularly the MEL Jamborees) had a positive effect on grantees’ MEL capacity, based on grantees’ assessments and our own. This also involved experimentation with different types of grantmaking, for example in the creation of a learning exchange fund and organizational health fund to supplement our core support to grantees with focused project-level grants.
3. **Improved tools for measuring impact** | EJP experimented with testing and development of new tools to assist the field in impact measurement. One example of this was an evaluation we funded and co-led with a grantee for one of their flagship programs, using a new evaluation tool called Contribution Tracing. This allowed both us and our grantee to share about the relevance and applications of the tool with others in the field. Another example was a project to develop new relevant and easy-to-use indicators for the fiscal governance field (i.e. our grantees), based on a commonly cited lack of applicable measurements. The result was a set of tested tools and a scoped universe of existing measurements for the field.
4. **Supporting Accountability Research Center’s start-up** | By providing early core funding to ARC over its formative years as an organization, we were able both support their maturation as an organization and ensure a critical gap was filled in the field: namely, pushing for development/accountability-related research agendas to be led by the people these agendas were purporting to serve. With our continued core support, ARC was able to incubate new projects, bring on new staff, connect to new funders, and take time to review their accumulated learning and examine their strengths and contributions as an organization. As EJP winds down, ARC plans to increasingly pursue project-level funding, largely based on what is available, but now with a better sense of who they are and what they do (and more fully developed lines of work). We believe our continued core funding played a key part in enabling that.

Words of advice

- Resources invested here have a clear multiplier effect—on grantee ability to drive, understand, and adapt for greater impact. Time and expertise are helpful, but money is a must.
- We found that it was valuable to think about power imbalances in who sets the evidence-generation agenda for a global field, in order to identify gaps and ensure our portfolio’s work was most effective. We found that global evidence-generation agendas (e.g. which interventions are evaluated, which change pathways are researched, which country

assessments are indexed) tend to primarily be set by and serve the Global North.

We supported efforts to counteract this power imbalance by supporting evidence-generation that spoke to the priorities of the Global South.

- On the whole, grantees have been very vocal in their praise of EJP/FGP's cohort building approach to MEL (e.g. jamboree, learning exchanges). Many have gone so far as to request (repeatedly!) that FGP/EJP establish a community of practice. Our strongest advice here is to resist these calls—and any that would formalize or center funders' involvement in grantee convening or communities of practice. Be open to fund efforts among grantees to host or pursue this community of practice instead.
- When supporting efforts to enhance field impact, we found that grantee leadership and ownership of capacity building is essential. We emphasized grantee leadership and ownership in the design of MEL jamborees, learning exchanges, the contribution tracing evaluation, organizational health fund projects, the Fiscal Governance Indicator project, and more. Doing so allowed us to be sensitive to funder power dynamics, and better ensure that (1) these efforts were useful to grantees and (2) grantees participated more voluntarily and equitably rather than feeling pressured.
- In seeking to make our work more than the sum of their parts through advancing a shared discourse, the parts have to be poised to "sum up." In practice this means to let the portfolios develop first and then explore synergies, overlaps and complementarities. To do otherwise may risk becoming excessively abstract or creating overdesigned bodies of work.