

Resource type	Example	Date created	2019	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				
■ MANAGE an evaluation or evaluation system					

## Learning exchange fund overview and application form

### Fund overview

One of the key goals of the Economic Justice Program’s Enhancing Impact for Improved Fiscal Governance portfolio is to build capacity for monitoring, evaluation, and learning in organizations and actors working in fields of fiscal governance, especially EJP grantees. We seek to make progress on this goal through a wide range of tactics including our traditional grantmaking practices, direct technical assistance, convening, and facilitation of peer exchanges.

Recognizing the importance and value of direct peer-to-peer exchange and the resource constraints within organizations to fund travel, convenings, workshops, or other costs associated with deeper peer exchanges between organizations, EJP makes a small pool of resources available every year for its grantees.

This fund is designed to provide additional, demand-driven support to **two or more existing** EJP grantees for specific, short-term exchanges that seek to advance organizational understanding, practice, creativity, or knowledge related to monitoring, evaluation, learning, and/or research.

### Organizational requirements

- Must include two or more existing Economic Justice Program grantees (may include organizations who receive EJP funds via another OSF network partner or as part of a direct sub-award to another organization)
- Submitting organization must be able to receive EJP funds directly
- All organizations involved must have the commitment and bandwidth to take on exchange

## Application guidance

- **Content of exchange:** A wide range of styles, practices, and techniques are encouraged, but all must seek to advance organizational understanding, practice, creativity, or knowledge related to monitoring, evaluation, learning, and/or research
- **Time frame:** Exchanges of less than 12 months
- **Budget:** Exchanges of less than \$15,000 are encouraged, but projects over this threshold may be considered
- **Grant details:** Project grants require a concept note and detailed budget (to start) as well as a final narrative report (these are defined flexibly) and financial report (at the end); both C3 and C4 funds are available
- **Organizational contributions:** Learning exchange submissions where a portion of the costs are provided by one or more of the submitting organizations are viewed favorably. This can be in the form of in-kind contributions (covering facilitation needs, meeting space, and hospitality-related items for events, covering costs of additional staff who will participate, etc.)

## What can be included in Learning Exchange Fund applications?

- **Can travel be included?** Yes. Often travel costs represent the majority of the budget for learning exchanges
- **Can staff time be included?** When significant, requests may cover staff time that will be spent working on the exchange.
- **Can non-EJP grantees be included?** Yes, as long as two or more EJP grantees are involved, other organizations may also be included. They may not be the grant recipient organization though
- **Can a single organization use learning exchange funds to work with its partners or members?** No. Though we recognize the substantial needs and interest in building capacity and opening up exchanges between members and partners of our grantees, these types of ideas cannot be covered by the learning exchange fund (unless the partners or members are also direct EJP grantees). For these kinds of ideas, we encourage you to discuss them with the EJP Program Officer that manages the main grant to your organization.

- **Can we integrate this into our existing grant from EJP?** No. This will be issued as a separate grant with distinct reporting requirements (though streamlined and simplified as much as possible).

## Fund timeline

The fund will be open from June 17, 2019, and will accept applications on a rolling basis until funds are fully disbursed (or until September 15, when unspent funds will be absorbed into other grantmaking plans for the remainder of the year).

Learning exchanges will largely be funded on a first come first served basis. If the fund is oversubscribed, some considerations we will use to make the decision:

- Rationale and plan for the exchange
- Clear and strong co-ownership between submitting organizations
- The extent of organizational contributions to exchange (in-kind or direct)
- Organizations submitting a learning exchange idea for the first time will be viewed more favorably
- Size of budget vs number of organizations involved

The first learning exchange awards will be decided by mid-July and then on a rolling basis until the fund is fully spent.

## How to submit a fund application

After June 17, 2019, Learning Exchange Fund applications may be submitted to: #####.

## Grantee application

This application is for submissions of two or more existing Economic Justice Program grantees to request funds to cover a learning exchange between their organizations to advance organizational understanding, practice, creativity, or knowledge related to monitoring, evaluation, learning, and/or research. In developing this proposal, you are encouraged to reach out to the EJP with questions or ideas along the way.

Although the submitting organization's main EJP Program Officer will stay in the loop on this work, s/he will not be your primary contact for this grant—instead, you will liaise with EJP's Enhancing Impact for Improved Fiscal Governance team. The grant's implementation and timelines will be treated separately from any existing grants with the program meaning separate

financial and narrative reports, but we have attempted to make these as succinct and minimal as possible.

**In no more than 3 pages (excluding budget), provide us with the following information:**

### Section 1: Exchange design

1. **Describe the proposed project** including the organizations involved, timeline, relevant activities, and intended outcomes (ideally 2–5 outcomes)
2. **Discuss the project rationale.** How or why will this project foster great understanding, practice, knowledge, or capacity in monitoring, evaluation, learning, and/or research among participating organizations? Why is this a relevant topic for the participating organizations now?
3. **Describe any risks or concerns** with implementing the exchange and plans for mitigation.

### Section 2: Project management & budget

1. **Identify the exchange lead and participants.** For the lead, identify the organization that will accept the grant and the appropriate staff lead from this organization. For all participants, provide a short background on their participation and roles/responsibilities in the exchange.
2. **Provide the current fiscal year budget for the organization leading the exchange:**
  - 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 detailed exchange budget** disaggregated for all major categories of expenditure and activity.
  - a. If **C4/lobbying activity** (as defined by the US tax code) is planned as part of the project, the applicant should discuss with their program officer, as a bifurcated budget breaking down lobbying and non-lobbying spending may be required. Discuss with the EJP team.

Submit completed applications to ##### after June 17, 2019.