

Grantee Perception Survey Follow Up: Final Update on Progress

INTRODUCTION

In 2011, based on the results of Oak's Grantee Perception Survey, Oak Trustees and staff identified a number of issues requiring further study and action.

These issues include:

- streamlining our grant making processes;
- defining sustainability and understanding better the capacity development needs of our partners;
- understanding how Oak can contribute to systems change and the scaling-up of new ideas and innovations; and
- tapping innovations, through improved communications and other mechanisms.

The foundation has made significant progress in achieving those objectives. The following is a summary of what we have achieved and how our systems have changed since the beginning of this process.

ISSUE 1: STREAMLINING OUR GRANT-MAKING PROCESSES

Defined tasks:



- Explore in more depth feedback in the Grantee Perception Survey concerning grant applications, selection and reporting procedures.
- Recommend options for change and improvement.

Results:



Based on a rigorous analysis of our systems and consultations with grantees, peer foundations, staff, Trustees and experts in the field in 2012, we made modifications to our existing application form, which all new grant applicants are now using. These changes reflect our principle of only asking for information that we need and making the grant-making process as efficient as possible.

Some of these improvements to the application forms and the application process include:

- (1) simplifying and clarifying questions in the budget and application forms;
- (2) tailoring key documents for grant applicants requesting core support funding (e.g., requiring the budgets of the organisations applying for core support, instead of asking organisations to complete our budget forms, and inviting grant applicants to only complete relevant questions in the application form);
- (3) developing detailed guidelines to assist grant applicants in completing our forms; and
- (4) explaining our grant-making process (including timing expectations) in more detail on our website.

ISSUE 2: DEFINING SUSTAINABILITY AND UNDERSTANDING BETTER CAPACITY BUILDING DEVELOPMENT NEEDS OF OUR PARTNERS

Defined tasks:



Make recommendation on the types of capacity building or “assistance beyond the grant” appropriate for Oak, including when in the grant-making process it should be provided.

Results:



A working group on organisational sustainability and capacity building completed its work early in 2013 and presented its report to Oak Foundation Trustees in April 2013. Over the course of that year, the working group conducted a wide range of consultations, involving staff, peer foundations and partners in every programme. We are grateful to all those who took the time to share their experience and ideas, both about Oak Foundation and on the broader questions of sustainability and capacity building.

The report of the working group addresses a number of issues, which include:

- (1) developing the abilities of Oak staff to support organisational sustainability and capacity building;
- (2) reinforcing our internal grant-making mechanisms to facilitate this work;
- (3) clarifying links between co-funding, financial sustainability and capacity building;
- (4) mobilising resources in the fields in which Oak works; and
- (5) supporting networks, sectors and movements.

Many of the group's recommendations involve strengthening existing practices at Oak Foundation and fostering cross-foundation learning. A few new mechanisms were also suggested and subsequently approved by our Trustees, including greater flexibility in awarding small grants (under USD 100,000) for capacity- building purposes and investing in the use of new tools, assessments and regional work. We believe that these measures will improve our ability to provide capacity-building support while recognising our fundamental role as a grant-making foundation.

ISSUE 3: UNDERSTANDING HOW OAK CAN CONTRIBUTE TO SYSTEMS CHANGE AND THE SCALING-UP OF NEW IDEAS AND INNOVATIONS

Defined tasks:



- Synthesise experience to date in facilitating system change and moving innovations to scale.
- Develop “think piece”, including best practices.

Results:



We are pursuing various ways to understand better the dynamics of systems change and the scaling up of new ideas and innovations. These areas are of increasing importance to all Oak programmes. As our research evolves, we will share the results more broadly on our website.

ISSUE 4: TAPPING INNOVATIONS, THROUGH IMPROVED COMMUNICATIONS AND OTHER MECHANISMS

Defined tasks:



- Develop plan to make greater use of social media.
- Develop new intranet.
- Improve clarity and consistency of our communication to grantees.

Results:



A communications plan was developed and presented to the Trustees in 2012. The communications plan included elements to improve the overall internal and external flow of information within and outside of our foundation. The working group, who wrote the plan, consulted with a number of our partners. In addition, we carefully researched the best communication and collaboration tools for us to use within our foundation and with our partners.

As a result of this research, we decided not to engage with social media (e.g., facebook, twitter, etc.) at the moment. Based on our research, it was clear that our partners wanted more direct communications with programme officers either through email, telephone or face-to-face communications.

It was also clear that our website was an important tool for communicating with our partners or potential partners. Therefore, in the future, you will see improvements to our website and more direct communications with programme staff. We will update our internet with new grants regularly and add more content on a regular basis to our What's New section of our website.