



Initial Trend Analysis Report

BUILD Developmental
Evaluation

JULY 15, 2019

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Introduction

Objectives of the Initial Trend Analysis

The goal of the Initial Trend Analysis (ITA) was to enable the evaluation and BUILD teams to examine learning from the familiarization phase and identify key areas of analysis for the main evaluation phase. Together, the two teams sought to develop the analytical framework for the evaluation - largely focusing on case studies - and to build the sample of grantees that would be invited to participate. In addition, by engaging in several BUILD convenings during the ITA phase, the evaluation team sought to raise awareness among grantees about the evaluation, share emerging findings and gather insight and feedback from grantees on the proposed case study approach and questions. Through the dialogue with Ford staff and grantees, the ITA resulted in a consensus on (a) what issues are most salient and strategically important to explore in the evaluative phase, (b) how to frame the questions to capture key institutional strengthening factors for grantees and Ford, and (c) the contextual factors and indicators that may shed light on how BUILD can contribute to institutional strengthening that ultimately leads to mission impact.

ITA approach

The ITA phase began in November 2018 with developing initial case study profiles and identifying preliminary samples of grantees for each case study. As envisaged in the familiarization phase, there are two types of case studies that examine a particular theme identified by the evaluation and BUILD teams as salient to achieving a deeper understanding of BUILD. The first are case studies of **Distance Travelled** which examine the experiences of organizational change, over time, among key categories of BUILD grantees. The second are **Deep Dives** which examine how grantees are addressing several key challenges or opportunities. Throughout the development of the case studies, the evaluation team has continually revisited and adapted the evaluation's four key learning questions, so they reflect the nuances of each case study and address ongoing learning at Ford and within the evaluation team.

The evaluation team reviewed data on the full cohort of BUILD grantees to select grantees for the case studies keeping in mind an optimal spread of grantees across the US and Global South, different thematic areas and regions, different sizes of organizations and stages of the organizational lifecycle, etc. The team also considered logistical factors, opportunities to look at particularly 'interesting' cases, and avoidance of outliers. When the proposed samples for each case study were completed in June, the BUILD team reached out to program officers (POs) and Directors to ask their assistance in communicating with grantees about their potential involvement. Throughout this process the evaluation team has been speaking with selected grantees at BUILD convenings to further refine the case studies' approaches and questions; these engagements will continue into

early August (see Table 1). The convenings have provided an opportunity for the evaluation team to observe and absorb the grantees' experiences of the BUILD convenings and to obtain a clearer understanding of the conversations underway between Ford POs and grantees about issues of strategic importance.

In addition, the convenings are an important opportunity to get feedback on proposed case studies that would benefit from additional expertise, for example challenges affecting People of Color-led institutions, one of the Deep Dive case studies. This iterative process to case study development is leading to a rich set of profiles and a strong set of proposed grantees for the evaluative phase. Given the time involved in gathering feedback and communicating with grantees about their interest, some still need to be confirmed. During the summer, the team will also hold initial conversations with grantees that have confirmed their participation in order to introduce them to the purpose and process of the case studies and get initial feedback on the case studies' approach and questions.

Table 1: Activities undertaken during the ITA

Activity
Visit to Indonesia office and grantees (November 4-9, 2018)
Attendance at JustFilms convening (November 13-14, 2018)
Attendance at OSA/MXCA convening (December 3-4 in Johannesburg, 2018)
Visit to States Working Group grantees in Texas, Louisiana and Florida (February 1-10, 2019)
Attendance at Women's Leadership convening (March 6-7, 2019)
Attendance at Puerto Rico Housing and Land Use convening (April 30-May 2, 2019)
Attendance at BUILD-TTI Funders Meeting on Organizational Strengthening (May 3, 2019)
Meetings with members of the evaluation team and BUILD Team (October 9-10, 2018 in Stockholm, other meetings in New York, January 31, April 1-2, May 3, 2019)

Limitations of ITA analyses

The BUILD and evaluation teams recognized from the outset that the evaluation would not be able to measure change against a 'baseline' given the heterogeneity of the BUILD grantees, absence of baseline assessments at the start of BUILD grants, and changes in and diversity of ways that initial proposals and reporting have been handled. For this reason, the case studies have been framed in such a way as to encourage grantees to *self-benchmark*, comparing their state of institutional and programmatic health when they first received a BUILD grant to their current state, and reflecting on the changes that have brought them to their current status. With this objective in mind, the evaluation will primarily use the Most Significant Change method and the data gathered will be largely qualitative since it will be difficult to quantify changes in terms of 'hard', generalizable data from across the sample (see below).

Lessons from the ITA for the evaluation moving forward

Overall lessons

The ITA largely confirmed the appropriateness of the developmental evaluation (DE) approach designed in the familiarization phase, given that DE embraces complexity and diversity of grantees, facilitates learning, and creates shared ownership among all stakeholders.

The proposed topics for the case studies have also been largely confirmed. Only two major changes have been made to the original plans from the familiarization phase. The first relates to the 'Deep Dive' case study originally planned for both People of Color-Led Organizations in the US, and Indigenous/Afrodescendent Peoples' Organizations in the Global South. The evaluation and BUILD teams recognized that organizations in the Global South are likely to be confronting different issues than those led by People of Color in the US. As such, the groups should not be merged into one case study and for this first Deep Dive case study will focus on grantees that have been historically led by People of Color in the US.

Plans for a possible Deep Dive on organizations of Indigenous/Afrodescendent Peoples have also been somewhat stymied by security and logistical factors that limit engagement with most of these grantees. The evaluation team will continue to actively monitor opportunities to address what is recognized to be a potential gap in the analysis. At the least, the evaluation team will meet grantees of Indigenous/Afrodescendent Peoples at a planned convening (date to be confirmed).

The second major change agreed during the ITA phase relates to the idea for a Deep Dive comparing earlier and later cohorts of BUILD grantees. This case study was expected to provide insight into BUILD's outcomes as a clearer and more intentional design emerged within the BUILD program. Given the large range of changes underway in the broader context of the Ford Foundation, the evaluation and BUILD teams recognized that attribution of changes to BUILD per se could be problematic, so this Deep Dive will not be pursued. Nonetheless, the influence of changes in BUILD over time remains a topic that interests the evaluation team, as noted below.

The evaluation team has also proposed exploring several topics that may not warrant a full case study, or for which it may not be feasible to collect a significant quantity of data. In these situations, we are considering undertaking a series of briefer 'Vignettes'. The evaluation will continue to pursue discussions around additional Deep Dives. We see a value in remaining flexible at this point regarding the continuum between Vignettes and full-fledged Deep Dive case studies, and propose that we continuously calibrate the intensity, quantity and depth of the cases to reflect emerging issues and the extent to which the grantees are comfortable engaging. Currently, the following topics are being considered for either a Vignette or a Deep Dive:

- What is unique about institutional strengthening among organizations led by Indigenous/Afrodescendent Peoples? *Likely to develop into a Deep Dive*

- How has the discourse on BUILD changed over time within the Ford Foundation, and what are the implications for the grantees' experience of BUILD? *Likely to be approached as a Vignette*
- What does it mean when a BUILD grant becomes a 'tie-off' grant due to changes in Ford strategies and priorities, noting that many of the results of this are likely to emerge ex-post? How is a BUILD grant different when it becomes a tie-off, as opposed to providing a basis for a longer-term relationship with the Ford Foundation? *Likely to develop into a Deep Dive*
- What have we learned from the development of the concept of 'convening'? *Likely to be approached as a Vignette*

We propose revisiting these choices in the next meeting with the BUILD team in October 2019 when we have been able to better gauge interest and engagement from the grantees. At that point we expect to be in a better position to select topics and decide on a timeframe for undertaking the rest of the Deep Dives and Vignettes over the remainder of the evaluation period. We recognize, however, that the process of anchoring and developing ownership of Deep Dive topics may require continued dialogue during the last months of 2019 before being confirmed.

As foreseen during the familiarization phase, it was not possible to create a 'representative' range of grantees for the case studies. This was partly related to the extreme heterogeneity of the cohort. In addition, striving for 'representativeness' could conflict with the evaluation's goals to: (a) include grantees that are seen to be strongly illustrative of certain aspects of the case study issues, (b) find a logistically pragmatic clustering of sample grantees in certain locations, and (c) adapt the selection to grantees and Ford POs who are receptive to participating.

Case study methods

Please refer to the [Familiarization Report](#) for the overall methodology of the evaluation.

Contribution Analysis¹ will be the primary approach used for the case studies since it enables evaluators to assess causal questions and, where possible, infer causality in real-life contexts. The approach teases out the extent to which interventions underpinned by a pre-existing theory (or theories) of change are contributing to the desired outcomes, while acknowledging that contextual factors may have greater impact on institutional change and mission impact than donor support. Whereas in its classic iteration Contribution Analysis is designed to elicit definitive end-line statements about program impact, this evaluation is harnessing the approach flexibly, recognizing that in a long-term initiative such as BUILD there will be multiple opportunities to feed the results into course corrections. Contribution Analysis, to the extent possible, places a grantee in the driver's seat both in terms of assessing starting point and distance travelled, as well as in identifying contextual factors that may be more or less central to determining how a grantee has utilized and benefited from BUILD support.

¹ See Mayne, J. (2008) Contribution Analysis: An approach to exploring cause and effect, ILAC methodological brief, available at http://www.cgiar-ilac.org/files/ILAC_Brief16_Contribution_Analysis_0.pdf. Also see https://www.betterevaluation.org/en/plan/approach/contribution_analysis

We recognize that the Distance Travelled grantee site visits, described below, are closely spaced over time for finding measurable changes. This is unfortunate, but we feel that the period between visits will be sufficient for assessing changes in thinking and early applications of the lessons that the grantees are learning when they (many for the first time) have the resources and time to reflect on how to strengthen their institutions and find ways to become more impactful.

The case study topics have been selected in order to explore what we expect will be these categories of change. In analyzing the overall cohort of grantees across the case studies we will look for other patterns of change, but the Developmental Evaluation approach demands reserving judgement and allowing the interviews to reveal which factors will prove significant or measurable. Detailed sets of questions have been developed for each case study (included in the case study profiles in [Annex Two](#)), which reflect the evaluation team's current 'hunches' regarding the most salient issues for the four overall learning questions in relation to each case study topic.

The case studies will include two sets of questions (see below for details):

- 'Standard' issues that will be assessed, compared and analyzed across the entire cohort of grantees participating in the case studies (i.e., 56, plus others that may be included in the sample as part of deep dives to be conducted in the future). See [Annex One](#) for a summary of these 'standard' questions.
- Case study-specific questions that have been developed in order to drill down further into the key evaluation learning questions developed during the familiarization phase. The questions listed in the case study profiles in [Annex Two](#) have been tailored to focus on the issues that emerged in the familiarization phase of the evaluation, the co-creation workshop and subsequent discussions.
- Both data sets will be synthesized to uncover patterns that may be unique to a given category of grantee, or which may appear across the overall cohort of grantees.

All the case studies will be conducted primarily using semi-structured interviews and will be triangulated with a variety of quantitative data salient to the issues being analyzed (largely drawing on available grantee reporting). Other methods will vary across the case studies. As noted, most will employ a Most Significant Change methodology as a way to provide an open-ended approach to analyzing the heterogeneity of the 'distances travelled' by the grantees.² Some case studies will use After Action Reviews and Critical Incident Analyses to look at the ways that BUILD support may have contributed to more effective ways to manage specific events or challenges that can shed light on broader processes.

The proposed case study methods are tentative and may be adapted further once grantees provide feedback. The principle of not over-burdening the grantees is central to our planning and we want to ensure that grantees know that we are attentive to this. Lastly, the evaluation team is aware of

² Related methods including Outcome Harvesting and Outcome Mapping have been considered, but ultimately rejected due to (a) the risk of placing too onerous a burden on grantees for monitoring processes over time, and (b) risks that an emphasis on outcomes related to a specific intervention might detract from attention to broader processes around institutional change and mission impact.

a growing number of studies and parallel evaluation initiatives that are being undertaken by the Foundation. We hope to be able to draw on the findings of these activities as complementary data and analyses. It will be important, however, to ensure that grantees are not confused by parallel initiatives that are underway.

Case study processes

Grantees will be asked about a set of general issues related to their mission and work and their experience with BUILD (see [Annex One, Standard Data Collection Guide](#)). This information will help shape the analysis in the BUILD developmental evaluation as a whole. Following this general information, grantees will be asked questions related to the focus theme of their case study (see [Annex Two, Case Study Profiles](#)).

The following summary of process, background data and reporting describes how the case studies will generally be conducted. There may be some variation from case to case as described in the case study profiles.

Steps and processes

- 1. Initial consultation** – We will begin by talking with grantees about the objectives of the case study in which they are participating, and validating the lines of inquiry, questions, sub-questions, indicators and methods with grantees. These conversations will be done via e-mail and phone calls in June-August 2019, prior to visiting grantees. During these conversations, we will ask grantees to provide us with relevant existing documentation so we can begin to get a sense of how the BUILD grant fits in with the grantees' work and institutional trajectory. We will not ask for additional reports or analyses.
- 2. Grantee site visits** – With the **Distance Travelled** cases, there will be two visits during the evaluation where we seek to learn about changes grantees have experienced over the time period of the BUILD grant. Each of these two visits will be two- to three-days long, depending on the nature of the specific case study. The first round of visits will take place during the latter half of 2019, and the second visits in mid to late 2020. With the **Deep Dive** case studies, we expect there will be just one visit of two- to three-days that will take place during the latter half of 2019. With both types of case studies, if there are significant developments in the life of the grantee during the course of the evaluation that could inform the case study, it is possible that an additional visit will be added. This optional visit would be to learn if, and how, the BUILD grant played a role during those developments. The Distance Travelled cases on Networks and Grassroots Organizing (and possibly others) may involve additional time and travel to visit network members and grassroots partners. For all visits, the team will strive to adapt the timing to respond to grantee needs and minimize strains during critical work periods.
- 3. Who we anticipate meeting** – For both types of case studies we expect to meet with management and staff of grantee institutions, as well as board members. To the extent possible,

we hope to meet with outside observers and constituents to hear their perspective on the grantees' evolution and impact. This includes, for example, the staff and focal points in partner organizations, policy makers and other actors that a network seeks to influence (as relevant), and constituents of the grantees' campaigns or programs. For some grantees this may involve meeting members of their network or decentralized branch offices. The need for these other visits will vary depending on the topic of the case study. We will also speak extensively with the Ford Foundation directors and program officers who have substantial knowledge of the grantees. These Ford Foundation interviews are expected to emphasize how directors and program officers have dealt with trade-offs, dilemmas and difficult choices with regard to issues such as, e.g., concentration of support to a smaller number of 'winners' and how this has impacted on the Ford Foundation's broader range of relationships.

- 4. Interview content** - We will use two sets of interview guides. One will be a standard data collection guide that will be asked in all the case studies (see [Annex One](#) below) and we expect that most of the first day of the visit will be devoted to these questions. The remainder of the visit will focus on the questions that are specific to each category of case study. These are outlined in the case study profiles ([Annex Two](#)). Interviews will be tailored for each stakeholder group, for example management and staff, board members, partner organizations, etc.
- 5. Validation** - In early 2020, after the first round of site visits for the Distance Travelled cases, we will prepare brief initial reports. During the first half of 2020, we will also prepare final reports for the Deep Dives. Both sets of reports will be shared for verification and validation. Once the data gathering and initial analysis for each case study is complete, the evaluation team will validate findings with the participating grantees, and as much as possible encourage dialogue among the grantees in the case study sample. This may consist of convening the grantees that participated in the case study to discuss and verify findings. Budgetary constraints may preclude a physical convening, in which case this may be accomplished through virtual means (conference call or webinar). Convenings organized by the BUILD team may provide opportunities to 'piggy-back' and conduct the validation exercise with a critical mass of case study grantees.
- 6. Documentation** - No new or additional reporting will be requested for the evaluation. We will review grant-related documentation and will request the grantees to share relevant materials, discussed below.
- 7. Survey** - In addition to the case studies, we plan to conduct surveys of all BUILD grantees (not just those in the case studies) to learn about their experiences with BUILD and to compare and contrast their feedback with what we learn through the case studies. Survey plans are presented below.
- 8. Engaging with the philanthropic community** - The evaluation team recognizes the desire to use the evaluation to inform the broader philanthropic community, and also the need to engage (to a modest extent) with other funders to contextualize BUILD within the landscape of funding and other relationships that the grantees experience. The evaluation team and the BUILD team are pursuing an ongoing discussion on the scope of these engagements going forward.

Background data sources

Documentation review - The evaluation team will review all relevant documentation related to participating grantees including proposals, recommendations for grant approval, narrative reports and other analyses. We will review additional information provided by the grantees such as strategic plans, information about organizational structure and governance (including agreements with partners, charters, agreements with members, etc.) and assessment of progress outside of BUILD itself (such as annual reports, monitoring reports, results of stakeholder surveys, etc.). The evaluators may review OMT analyses if grantees wish to share them.

Financial resilience analysis - The evaluation team will review available financially related data from the grantees participating in the case studies to assess changes in (a) operating reserves, (b) ability to withstand financial shocks, (c) diversity/stability of other sources of funding (recognizing that diversification carries with it increased transaction costs and may not necessarily have positive implications), (d) proportions of restricted and unrestricted funding, (e) ability to maintain stable staffing and offer longer (more attractive) contracts, and (f) other notable changes in financial resilience during the course of the BUILD support. We recognize that the data available will not be strictly comparable and direct attribution of changes to BUILD support may not always be possible. US grantees are expected to have more uniform (and thus comparable) financial data. We judge that the overall trends across this large cohort of grantees will reveal strongly indicative trends. We predict that the financial data will consist of:

- Available grantee financial information
- Analysis conducted by Ford Foundation staff for specific sets of BUILD grantees
- Data collected by BUILD grantees as part of their monitoring and evaluation routines
- Guidestar Financial SCAN data (primarily for US grantees)

Additional literature - In addition to grantee-specific documentation, the evaluation team will review other related literature including relevant academic studies, debates within the philanthropic and broader community, evaluations of similar programming, reports of additional Ford Foundation evaluation efforts, etc. in order to widen the perspectives on the issues being analyzed.

This additional information will also ensure that the case study reports inform the discourse in the social justice and philanthropic communities around the issues analyzed in the case studies and the overall BUILD developmental evaluation.

Full cohort survey

In addition to the case studies, we plan to conduct surveys of all BUILD grantees to learn about their experiences of BUILD and to compare and contrast the information with what we observe in the case study work. The results will help gauge the degree to which case study findings are likely to be true across the BUILD cohort. We plan to survey the cohort twice over the course of the evaluation.

We expect there to be three possible outcomes from the survey:

1. We do not learn anything new, meaning that the experiences of our case study grantees are validated by the survey of the whole cohort.
2. We learn about trends in the first round of the survey that we did not detect or appropriately prioritize from Familiarization and ITA phases, so we can adjust and follow those lines of inquiry while we have time. This is a developmental outcome of the survey activity.
3. We detect patterns of experience with BUILD, or even results, that we could not detect based on the small sample sets in the case studies. This could be relevant for various subsets: indigenous peoples' rights related grantees, arts related grantees, small grantees, large grantees, etc.

The first survey will ask grantees:

- What areas of institutional strengthening, per the BUILD pyramid, did the grantee focus on with BUILD support
- How, and the degree to which, the BUILD grant and support was beneficial to the grantee
- Factors of BUILD that positively and negatively influenced institutional strengthening for grantees
- Which drivers of inequality the grantee focused on
- How the organization defines social change and how they intend to contribute to these outcomes
- Which factors of institutional strengthening have been most instrumental in enhancing the grantee's impact on inequality
- The impact of BUILD on new or existing funding and partnerships
- Which specific aspects of BUILD support they find important, and
- What were the direct or indirect impacts on the field as a result of organizational changes made with BUILD support.

In addition, grantees will be asked if they are interested to have additional contact with the evaluation team in order to further explore the questions from the survey.

The survey was first tested in June 2019 with the NIRAS team, the Ford Foundation BUILD team and POs. Based on the results, we will update the survey and translate it into Spanish in July 2019, and administer the survey with grantees in September 2019.

The survey will be administered again in the beginning of 2021. The second round will have two sets of responses. The first set will be grantees that had a BUILD grant and responded during the first round in 2019. We may be able to detect aggregate patterns of change over time in this set. The second set will be grantees who did not have a grant during the first round of the survey. This set will be used to add to the early survey looking at the strategic focus, priorities and 'early' effects.

The analysis will focus on change trends and the degree to which the full cohort responses, as an aggregate, reflect what we observe in the case studies.

Data analysis and drawing conclusions

The different case studies and data sources will be synthesized and triangulated to draw conclusions regarding what BUILD has offered different *categories* of grantees in different *contexts* when struggling with different *problems* and striving towards different *aims*. We are confident that the evidence will be sufficient to arrive at rigorous conclusions about where BUILD has and has not been effective in supporting these struggles in comparison with past grant-making practices at the Ford Foundation and in relation to the broader funding landscape.

However, it is important to stress that these findings are likely to be heavily contingent on BUILD's contributions within a given context. This is the justification for the contribution analysis approach that is being applied in the evaluation, but we recognize that this ultimately limits generalizability. Also, the evaluation will provide guidance for decisions (by both grantees and the Ford Foundation) about managing the risks and opportunities inherent in following different institutional development paths and leveraging these efforts for greater mission impact. The decisions about how much risk to take will be up to the grantees and the Ford Foundation. We have already heard a range of views within the Foundation and among grantees about where to 'place the bets' that BUILD offers and why. The evaluation will inform those choices, but subsequent decisions will ultimately reflect intended relationships between Ford and grantees, levels of risk aversity, and prevailing strategic frameworks and prioritization. The evaluation will have an important role in making these choices more transparent and anchored in empirical evidence, but these choices will remain difficult and controversial.

Reporting

Case study initial and final reports - After each period of field work in the Distance Travelled case studies, the evaluation team will produce brief initial reports for verification and validation purposes and in order to provide a basis for cross-learning and dialogue among the grantees participating in the case. At the end of all the case studies a final report will be produced that will serve as a stand-alone study.

Mid-term and final evaluation reports - The case studies will also provide the main empirical input into analyses in the stand-alone overall mid-term and final evaluation reports.

Other communication outputs - Additional outputs may be produced as appropriate to share learning and contribute to debate, not least in relation to Life After BUILD discussions at the Ford Foundation (as the evaluation will be revealing significant factors, particularly in relation to financial resilience). The overall evaluation is designed to inform future programming as well, including ideas that are currently being referred to as BUILD 2.0.

Reporting from grantees - The evaluation team will not request additional reporting from the grantees apart from feedback and validation with regards to emerging findings.

Anonymity - Full anonymity is nearly impossible in the evaluation, but confidentiality will be a primary concern for the grantees. The evaluation team will anonymize data unless there is a reason to refer to the identity of a respondent. Where this occurs, the evaluation team will request permission from the grantee.

Next steps

Finalizing the case study samples and starting the case studies

As noted above, the intended samples for the case studies have now all been identified and grantees notified of our interest in having them participate. As the evaluation team receives an indication of interest from a grantee, an initial phone call is being arranged to hear the grantee's initial reactions to the case study approach and overarching questions, and to request further background information. For some grantees, ongoing reassessment of security and other factors will be necessary.

The first round of actual fieldwork with the grantees is expected to begin at the end of August 2019 and be largely completed by December 31, 2019. This will be followed, in early 2020, by preparation of brief initial reports that will be shared with the grantees for verification and validation. The evaluation team will experiment with ways to enable exchange and dialogue among the grantees in a given case.

Key activities during the evaluative phase

Activity	When	With whom
BUILD/evaluation team meetings	Approximately in October and April each year	BUILD and evaluation teams
Participation in convenings	To be determined on a case by case basis	Evaluation team
5 case studies - distance travelled	July - December 2019	Grantees, FF POs and BUILD team
5 case studies - deep dives	July - December 2019	Grantees, FF POs and BUILD team
Survey(s)	September - December 2019	Grantees
Evaluative report	April 2020	BUILD team - in-person meeting
Communication and learning discussions with grantees (either as side events of BUILD convenings or as separate gatherings)	April - June 2020	US and regional; grantees, FF POs and BUILD team
5 continued case studies - distance travelled	August - December 2020	Grantees, FF POs and BUILD team
5-8 case studies - deep dives (possibly divided into a larger number of vignettes)	August - December 2020	Grantees, FF POs and BUILD team
Survey(s)	August - December 2020	Grantees
Evaluation report II	February 2021	BUILD team - in-person meeting
Final learning discussions with grantees, FF and philanthropy funders	March 2021	US and regional grantees, FF POs and BUILD team

Annex One: Standard Data Collection Guide

<i>Learning questions</i>	<i>Data to be collected</i>
<p>Mission/ influence - Does strengthening key institutions and networks advance (or consolidate past advances in) social justice?</p>	<p>Data sources: Interviews and reporting</p> <p>Standard questions:</p> <ul style="list-style-type: none"> • Major changes in mission impact that the organization has achieved in the past three to five years • Factors leading to these changes • BUILD's contribute in relation to these factors • How institutional strengthening contributes to mission impact; conscious links in the BUILD programming • Changes in how inequality is being disrupted now than before the grant
<p>Institutional strengthening - How has BUILD strengthened grantees?</p>	<p>Data sources: Interviews and reporting</p> <p>Standard questions:</p> <ul style="list-style-type: none"> • Growth, Consolidation and Sustainability <ul style="list-style-type: none"> · Staff capacity (types, number and change) · Funding diversity and clarity of value proposition to funders (is diversity an objective?) · Changes in operating budget (BUILD's influence in relation to broader trajectories) · Perceived consolidation around appropriate scale and scope · Changes in organizational culture during growth, greater formalization, etc. (types of changes, positive/negative) • Resilience <ul style="list-style-type: none"> · Capital assets and reserves · Flexibility and predictability of funding · Responding to crises, opportunities, shocks, etc. • Effectiveness and Efficiency <ul style="list-style-type: none"> · Stability/Enhancement of Leadership/Governance · Diversity, Equity and Inclusion progress and scope · Changes in internal systems · Changes in safety/security • Strategic Clarity and Coherence • Is anything missing from the BUILD pyramid? • Relevance to organizations that may not 'fit the mold' of conventional institutional strengthening efforts, e.g., Indigenous Peoples, etc.

<p>Influence on Networks/ Fields - Did BUILD impact grantees' roles in leading or taking part in networks in a way that strengthened those networks?</p>	<p>Data sources: Assessment of influence and outcome contribution, including interviews with constituents, stakeholders, observers</p> <p>Standard questions:</p> <ul style="list-style-type: none"> • Increased influence among other organizations and on mission goals • Improved network leadership and contribution <ul style="list-style-type: none"> · Network member perception · Funder, stakeholder perception · Public/constituency perception • Grantee perception of having achieved an appropriate and viable level of engagement with actors in the network
<p>Design and implementation - Has BUILD been organized and implemented optimally to achieve the desired impacts?</p>	<p>Data sources: Grantee interviews</p> <p>Standard questions:</p> <ul style="list-style-type: none"> • Review each of the BUILD 'strategic levers' • Flexible funding - evidence that funding enabled, encouraged, allowed and/or prodded intentionality around internal strengthening, external influence and strategic impact • Long-term funding commitment - evidence that funding enabled, encouraged, allowed and/or prodded intentionality around internal strengthening, external influence and strategic impact • Grantee/Program Officer partnership - is the relationship collaborative? (grantee feels like a respected partner, making decisions, authoring the plan, regular supportive contact, grantee-PO trust and transparency, more than money, balanced); if there were changes in Ford strategies, how did this affect the relationship? • CCTA impacts - increased and/or improved peer connections (new IS/operational partners, strategic and technical sharing/support, implemented practices, 'sense of team' i.e. mutual moral support) • OMT influence - useful to organization, provided strategic clarity/coherence, was adaptable to broad and diverse contexts • Effects of other processes underway at Ford Foundation - notably strategy shifts • Grantee impressions of dialogue on Life After BUILD, BUILD 2.0, tie-off management (where relevant) and related processes, and how these engagements are influenced by having a BUILD grant • Where is BUILD most/least important for institutional strengthening/mission impact • Reflections on impact of being designated as 'privileged' in relation to others in the field due to access to a BUILD grant • Unintended consequences and outcomes • Other design questions: e.g., Who is left behind in the BUILD model? Are networks adequately supported? What might be better designed to support greater inclusion?

Annex Two: Case Study Profiles

Case study: **Distance travelled**

Title: **Emerging organizations**

Responsible team member: Raphaëlle

Synopsis

Even if BUILD has primarily been focused on well-established organizations, there is a significant cohort of organizations that have used the grant to formalize and stabilize themselves after having worked with less formalized processes and systems and/or less complex or specialized structures or staff.

These include:

- organizations with a relatively new or informal organizational structure;
- organizations with less formalized, undocumented or lower degree of strategic clarity and institutional strength compared to larger, established actors in the field;
- organizations that may still be led and shaped by a founder director;
- organizations that have grown in size or staffing rapidly and now require a more formal governance structure and organizational systems.

This is a fundamentally different process than that of other grantees that were already well established, and it is hypothesized that the contours of these theories of change will differ.

How learning questions will be addressed

<i>Learning questions</i>	<i>Relevant sub-questions</i>	<i>Notable features related to this case</i>
Does strengthening key institutions and networks advance (or consolidate past advances in) social justice?		
	If so, how? In what context?	To what extent can emerging organizations weigh in/ contribute to achieving broader social justice outcomes and has this changed during the period of BUILD support? What contextual factors are conducive or obstruct this?

		<p>What's their comparative advantage (or inherent weaknesses) compared to larger, more established organizations? Do they truly benefit from being agile, nimble and responsive to the context? How is the BUILD grant helping them do so?</p> <p>What are the trade-offs for emerging organizations when it comes to focusing on organizational development? Is the BUILD model able to respond to lean structures which have little 'inward-looking' focus versus 'outward-doing'?</p>
	What grantee characteristics matter most?	Are there differences between emerging organizations with strategic clarity but little capacity versus emerging organizations with capacity but a vague goal/ direction?
	Under what conditions?	<p>Does the stage at which the BUILD grant is made matter in the development of emerging organizations?</p> <p>E.g.,</p> <ul style="list-style-type: none"> - getting set-up - having a plan in place - having secured funding - having a few years of existence - having more than five years of existence
	What aspects of BUILD have been most/least important for making this link?	<p>Is IS enabling emerging organizations to amplify and accelerate impact in a way they would not have been able to otherwise? To achieve broader social justice goals or position themselves in their fields?</p> <p>To what extent is the long-term commitment of BUILD helping an emerging organization plan and act in the longer game?</p>

How has BUILD strengthened grantees' institutions?

	Are there particular areas in the BUILD pyramid that are featured more or less in the institutional strengthening?	<p>Are emerging organizations systematically focusing on a few areas of the BUILD pyramid, or do different models exist in terms of 'emergence pathways' (e.g. starting in the higher level of the pyramid before having strategic clarity). Is the pyramid 'too much' for small, emerging organization to manage? Does the BUILD model presume a linear development pathway, or is it more of a pick-and-choose?</p> <p>This would question the validity of the BUILD approach as somewhat a linear path to organizational development.</p> <p>For organizations aiming to 'catch-up' after a period of rapid growth, how is the BUILD pyramid and model working for them?</p>
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	<p>Has BUILD supported grantees to develop their strategic clarity and coherence in the effort to dismantle inequality?</p>	<p>Are emerging organizations more likely to develop their first strategic plan with their BUILD grant? Do they plan longer-term than they have before, and what are the implications on their strategic direction? Does having a BUILD grant allow for more clarity and refinement on mission, vision, comparative advantage, place in the ecosystem?</p>
	<p>Did BUILD help the organization “scale” or decentralize?</p>	<p>Do emerging organizations typically aim to grow/ scale their work, and if so, is BUILD enabling a more ambitious approach? If they want to stay small, what does this imply for the BUILD process?</p> <p>What is the most common scaling approach? Geographical, sectorial, intersectionality, etc.</p> <p>Has scaling been too fast/ too ambitious for emerging organizations who received a BUILD grant? What are the unintended consequences?</p> <p>Does the formalization (that may accompany BUILD support to emerging organizations) lead to greater centralization or enable them to look further afield and decentralize?</p>
	<p>How is the BUILD impact different from other donors or other types of Ford Foundation grant-making?</p>	<p>Explore this question for the perspective of organizations who are surviving off of small project based funding versus organizations which have lost a major (unique?) funder and need to be ‘saved by BUILD’ and/ or diversify their funding.</p> <p>Is diversification a problem for small, young organizations that may become fragmented when responding to a range of donor demands? Is BUILD helping them to identify an appropriate business model to avoid this?</p>
	<p>How have organizations strengthened essential organizational culture while undertaking major institutional changes?</p>	<p>Is BUILD enabling such thinking for emerging organizations which have a less established organizational culture? An already strong organizational culture?</p> <p>Are changes in the organizational culture happening in conjunction with major institutional changes, or do emerging organizations ‘keep the two separate’ to some extent? Is this limiting or not? (e.g. operating as an established organization but keeping the early-stage culture)</p>

	Are grantees becoming more resilient in relation to financial or contextual risks?	<p>Explore this question for the perspective of organizations who are surviving off of small project based funding versus organizations which have lost a major (unique?) funder and need to be 'saved by BUILD' and/or diversify their funding.</p> <p>Is diversification a problem for small, young organizations that may become fragmented when responding to a range of donor demands? Is BUILD helping them to identify an appropriate business model to avoid this?</p>
Did BUILD strengthen grantees' roles in leading or taking part in networks and what have been their broader impacts?		
	If so, how?	<p>Do emerging organizations see leading or taking part in networks within their sector as a priority (perhaps given limited capacities and desire not to overstretch)? If so, how is BUILD enabling them to do so, and how is this different from what they were already doing 'before BUILD'? Is BUILD a catalyst for establishing their first formal partnership or collaborations with others?</p>
	Are BUILD grantees developing stronger capacities to catalyze, lead and/or support collaborative mobilization within the fields they engage in?	<p>Does becoming a BUILD grantee enable emerging organizations to 'get a seat at the table' in their fields? To what extent is this beneficial to them (versus other types of BUILD grantee organizations)?</p> <p>Are there other ways in which BUILD helps emerging organizations to lead/ support/ participate in collaborative mobilization within their fields of interest?</p>
	Have BUILD grantees elevated the work of their partners to respond to the strategic challenges in the field?	<p>Maybe not so relevant for emerging organizations, which are being elevated themselves presumably.</p> <p>We will however explore if emerging organizations are growing from a role as a service provider to becoming a larger/older organization in the network (e.g. Upturn).</p>
	Do BUILD grantees influence the ways that power is distributed among members of a network and if so, how?	<p>Does becoming a BUILD grantee enable emerging organizations to 'get a seat at the table' in their fields? Is this leading to stronger networks/ filling a gap in the field/ providing an alternative/ 'shaking the grounds' for more established organizations and their ways of operating?</p>
	Do these networks generate broader influence in their respective fields?	<p>Do emerging organizations generate influence within their groups of peers and partners who are similar in size and scope but are not BUILD grantees?</p>
Has BUILD been organized and implemented optimally so as to achieve desired impacts?		
	How has the General Operating Support (GOS) component of the BUILD grant contributed to the institutional strengthening of BUILD grantees?	<p>Could be interesting to look into where GOS encouraged emerging organizations to continue in full scale operational mode when it would be healthier to step back more and reflect on what might be a more appropriate balance and ambition (similar to the grassroots organizations case study).</p>

	Has the Institutional Strengthening (IS) component of the BUILD grant been “fit for purpose” in relation to grantees’ needs?	What are the trade-offs for emerging organizations when it comes to focusing on IS? Is the BUILD model fit for purpose for organizations which have non-linear development pathways/ those who want to remain agile/ small?
	Have the BUILD GOS and IS funds contributed to the organizational development of BUILD grantees in ways that are different than GOS or IS funding from other sources? If so, how?	
	What is the impact of long-term, stable funding on grantees’ institutional strengthening and mission impact?	Stable funding for organizations which are ‘younger’ than the length of a BUILD grant - what does this mean in terms of projecting themselves in the future? In terms of shifting mission impact to take on a broader range of opportunities? To what extent is BUILD maybe changing the nature (‘corrupting’ in some way) of emerging organizations with long term and stable funding? What does this mean after the end of BUILD?
	How have the convening and technical assistance components of BUILD been utilized by grantees and to what effect?	Compare emerging organizations which have received CCTA support versus those who haven’t yet E.g. Organizations participating in the Just Film convenings.

Detailed description

The focus of this case study is organizations in the BUILD grantee cohort that have been in existence for less than 10-15 years¹, that possess a number of characteristics that mark them as ‘emerging’. These include:

- organizations with a relatively new or informal organizational structure;
- organizations with less formalized, undocumented or lower degree of strategic clarity and institutional strength compared to larger, established actors in the field;
- organizations in the process of identifying goals and roles and responsibilities;
- organizations that have grown in size or staffing rapidly and now require a more formal governance structure.

These grantee organizations will have been selected for BUILD because they have the potential to **become more established, stable actors and leading entities** in their respective fields, either because they fill a gap in the sector or because they challenge/ represent an alternative to the more established organizations in their field.

The case study will look at how and to what extent these organizations are leveraging the BUILD grant to **organize, stabilize and/or formalize, and potentially grow** into more sustainable

¹ This excludes the ‘older’ organizations that operate with a lean model, for instance.

actors in their field while refining their strategic intent, use of resources, defining clear roles and enhancing their exchanges with other actors in the field. Resilience and agility will also be studied to examine the value-added (or otherwise) of the BUILD grant for this type of organization. Another dimension we will explore is the **potential trade-offs between retaining their pre-existing nimbleness and formalization** for these emerging organizations.

We hope to gain insights into important questions such as whether the BUILD Theory of Change works for early-stage/ newer/ smaller grantees, as opposed to more established organizations, and if so, what the BUILD model can do for such emerging organizations. This should help better explain the concept of emergence and the manner in which organizations solidify their existence, as well as how BUILD as a model² is tailored for comparatively high-risk investments in organizations that face a more uncertain future compared to more established organizations (refer to Case Study on Established Organizations).

The approach for this case study is primarily qualitative and will rely on a Most Significant Change (MSC) method. Semi-structured interviews will be used to gather data and information. These will be conducted through a combination of field visits and virtual engagement (Skype; Zoom; emails). Interviewees will include staff of the grantees (from leader, to management and operational), to understand which strategy they are using (and what can be attributed to the BUILD grant) to organize, stabilize and/or formalize, and potentially grow. Interviews will also be conducted with selected respondents from partners and constituents to capture the effects of the BUILD grant from the perspective of the field. Views will also be sought from BUILD POs to bring out their expectations and achievements in relation to this group of emerging grantee organizations.

Particular attention will be given to alternative scenarios and organizational evolution, as described from the perspective of leaders of emerging organizations. Non-BUILD emerging organizations could be used as a 'comparison group' to gather additional views in relation to 'emergence pathways', through ad-hoc interviews during case study visits if possible.

The sample includes opportunities to look at contrasting approaches within a similar field or thematic area, notably Tech and Society (Upturn in Washington DC) and JustFilms (In-Docs in Indonesia and Doc Society in the UK). The case study will also include opportunities to look at the effect of the BUILD grant size in relation to the grantee's annual budget (as highlighted in the table below).

The evaluation team will visit each grantee two, possibly three, times in the course of the evaluation.

Learning and communications

Given the 'mirror' format of the case studies Established Organizations and Emerging Organizations, it may be useful to draw comparisons and potentially learn lessons as to the differences and similarities in their use of the BUILD grant and its effect over time. Should these lessons be of value, it could be useful to bring the two cohorts together to discuss further and consolidate the learning.

² 'Model' is defined broadly, from the areas of focus on the BUILD pyramid to the contracting process between emerging organizations and the Ford Foundation.

In addition, there are clear links between this case study and the Leadership Transition case study, especially with regards to the effect of BUILD on the leaders/ founders of emerging organizations. These links will be explored during the evaluation and learning shared across organizations considered as emerging and undergoing a leadership transition.

Case study: Distance travelled

Title: Organizations engaging at the grassroots

Responsible team member: Ian

Synopsis

This case study will focus on organizations engaging large groups of people in a grassroots manner. The analysis will seek to understand how institutional strengthening is enabling a range of organizations to work in a more impactful manner at grassroots level, promote local leaders and build linkages between this work and more macro-level policy change. An important justification for this focus in the evaluation is to better understand how BUILD can contribute to organizations primarily working (and in most cases based) outside of the areas where Ford concentrates its nationally focused work in the US (i.e., not in New York, Washington, D.C., and San Francisco/ Oakland), and those primarily focused on local engagements in the Global South. The grantees selected for the case study all see their strengths to lie in enabling the voice and power of marginalized communities to generate change by retaining a primary focus on the local issues that frame discrimination and obstruct social justice. The institutional challenges facing these organizations are expected to relate to factors such as decentralization, how to bring together advocacy with providing/channeling services to their constituencies, and how to leverage their core community organizing ethos to fight discrimination. It is likely that this will include an opportunity to contrast different approaches to engagements in the political and legal/regulatory spheres respectively, as some grantees are working with legal services, including support to immigrants and different sectors of workers (construction, restaurants, etc.).

How learning questions will be addressed

<i>Learning questions</i>	<i>Relevant sub-questions</i>	<i>Notable features related to this case</i>
Does strengthening key institutions and networks advance (or consolidate past advances in) social justice?		
	If so, how? In what context?	How do grassroots organizations ensure that the lessons, messages and (above all) the visceral drive generated through grassroots organizing translate into social justice outcomes? As such, does the BUILD support help them to leverage their pre-existing organizational culture to reflect on how to become more impactful?

		<p>How do organizations balance addressing the immediate needs and concerns of their constituents (including providing services) with broader advocacy goals (which may not be shared by all of their constituents)? How effective are the grantees in balancing efforts to give their constituents the lead in defining their agendas and the organizations own leadership in ensuring coherence in advocacy and other externally focused initiatives? Has BUILD contributed to the way they manage this balance, especially in terms of how they analyze and manage power dynamics between their organization and their (possibly divergent) constituencies? Does IS play a role in enabling a more intentional and effective approach for this?</p> <p>Methods to contrast (and look for similarities) in contexts, explicit attention to seeing where the US/GS dichotomy is and is not relevant for understanding differences in the role of BUILD.</p>
	What grantee characteristics matter most?	Are there differences between grantees with a clearly defined constituency (e.g., an indigenous group, disaster affected people, slum dwellers, construction workers, etc.) versus those with a broader focus?
	Under what conditions?	<p>Most of these grantees are working in tumultuous conditions, related to state oppression, well-financed/armed opposing forces, boom/bust engagements related to electoral cycles, sudden energy and shifts of attention when responding to natural hazards, etc. How does this affect their ability to move forward? How does it affect their IS work?</p> <p>Possible use of Appreciative Inquiry methods. Possible cross learning with Challenging Environments case study.</p>
	What aspects of BUILD have been most/least important for making this link	To be assessed based on looking at the pyramid in relation to the pentagon with particular emphasis on the characteristics of discrimination that specifically relate to their relations with marginalized groups of constituents. A line of inquiry that may overlap with the networks case study is if/how BUILD has enabled capacity development and relationship building among local leaders.

How has BUILD strengthened grantees' institutions?

	Are there particular areas in the BUILD pyramid that are featured more or less in the institutional strengthening?	To be analyzed in relation to a matrix where the pyramid is related to the practical concerns of organizations and local leaders working with a combination of community organizing and advocacy, with particular aspects of the pyramid related to particular functions of the organization.
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		<p>Does the pyramid reflect the values and priorities of grassroots organizations, or do they approach institutional strengthening from a different conceptual framework (particularly important to explore among indigenous peoples' organizations)?</p>
	<p>Has BUILD supported grantees' to develop their strategic clarity and coherence in the effort to dismantle inequality?</p>	<p>Strategic clarity/coherence within this case study will relate very much to grantees' different theories of change related to both local needs and sub-national/ national/ global political and policy change. Has the BUILD support enabled them to 'step back' from their day-to-day community organizing and campaign work, and if so what have been the effects? Have they been able to work more intentionally with (for example) the potentially differing priorities among their constituents? Has this changed over time and if so how?</p>
	<p>Did BUILD help the organization "scale" or decentralize?</p>	<p>What are the ambitions and scale in grassroots level work, and how (if at all) did BUILD enable a more ambitious or focused approach?</p> <p>Was this scaling geographical? New sectors? Broader target groups and greater intersectionality? Centralized or decentralized control?</p> <p>Has this scaling involved a shift from grassroots services to broader advocacy, and/or has it involved deepening connections and commitments within and among participating constituents, and did BUILD contribute to this?</p> <p>What are the limits to scale (and diversity) of efforts? Urban biases? Ensuring ownership within certain marginalized groups? Invisibility of certain marginalized groups (e.g., certain ethnic groups, disabled people, elderly, youth, etc.)? Has BUILD enabled greater critical reflection on these factors and has it led to changes?</p> <p>Related to this is also the extent to which they have been able to find a solid niche within the other organizations in their coalitions, tables, 'non-profit industrial complexes', etc. in their country, state, rural/urban contexts, etc.</p> <p>Has access to BUILD institutional strengthening support enabled the grantees to assume a more appropriate stance on scaling-up that overcomes pressures they face (from either funders or their own internal objectives) to maximize and obtain greater efficiencies in relation to objectives such as getting voters registered and to the polls? In other words, are they able to focus on the quality of their work at a reasonable scale amid other pressures to meet more quantitative expansion goals?</p>

	<p>How is the BUILD impact different from other donors or other types of Ford Foundation grant-making?</p>	<p>Some grantees, particularly in the Southern US, largely survive off of small, short-term grants to mobilize voters, etc. in conjunction with electoral campaigns. Some are perceived by donors as tools to get out the vote, while they themselves are struggling to work throughout the year. This may be aggravated by their physical distance from where the donors are based (making them invisible outside of election cycles). Does BUILD help to make them more consistently visible? Are there similar tendencies in the Global South?</p> <p>Has BUILD enabled grantees to change the conversation they have with other donors about the importance of quality, sustainability and responsiveness to constituencies- Among donors that tie funds to reaching immediate short-term quantitative targets, have they been able to raise awareness of alternative paradigms? Is the BUILD grant encouraging other donors to reflect on where they may have applied instrumental attitudes and approaches (which are often aggravated by the fact that grantees are based far from donor headquarters and therefore less likely to be based on close and trusting relations)?</p> <p>In the Global South there appears to be more of a recognition of the grantees' roles in movement building. There may be some interesting contrasts that could be explored which could highlight features of the funding landscape that will influence what an appropriate niche may be for BUILD and Ford more generally, as well as informing Ford's efforts to inform philanthropy more broadly.</p>
	<p>How have organizations strengthened essential organizational culture while undertaking major institutional changes?</p>	<p>There appears to be a high level of critical self-reflection and intentionality among the grantees in this case study, as they recognize profound challenges in, e.g., organizing different groups that may themselves harbor zero sum or even racist attitudes towards others. How have they worked with organizational culture to deal with this? Are there limits? How do these issues manifest themselves within grantee organizations wherein the headquarters may be more 'radical' than the grassroots constituents?</p>
	<p>Are grantees becoming more resilient in relation to financial or contextual risks?</p>	<p>Regarding financial resilience, as noted above, there may be issues around the biases in philanthropy in the US where funds for state and locally based groups are often narrowly focused, extremely time bound and focus on quantitative targets related to an event (especially an election); whereas in the Global South there perhaps has been more respect for movement building. This is a hypothesis to test. It suggests that strategies for financial resilience may differ and contrasts may be informative.</p>

		<p>Some of the grantees are clearly facing existential threats (i.e., some overlap with the Challenging Environments case study). Extreme climate events may generate demands from constituents to be even more nimble than they are able, and it will be important to assess if/how BUILD support has enabled them to respond appropriately so as to shepherd resources while being attentive to the acute crises affecting constituents.</p>
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Did BUILD strengthen grantees' roles in leading or taking part in networks and what have been their broader impacts?

	<p>If so, how?</p>	<p>There is a complicated and rather blurry relationship between grassroots movements and networks that will need to be defined (for the evaluation team) in order to delineate between this case study and the case on networks. This case will focus on organizations that are directly rooted in community organizing work, even though they in most cases also engage in advocacy at more macro levels. It is recognized, however, that these definitions will continue to be somewhat blurry and a dialogue between these two case studies will be essential.</p>
	<p>Are BUILD grantees developing stronger capacities to catalyze, lead and/or support collaborative mobilization within the fields they engage in?</p>	<p>This question will involve unpacking the spheres of control, influence and interest of the grantees. Also, it may involve questions about the ability of the head offices of these organizations to work with a range of small community level organizations and informal local leaders without an organization. A major question is whether they can remain relevant to their grassroots constituencies while engaging in advocacy at more macro levels.</p>
	<p>Have BUILD grantees elevated the work of their partners to respond to the strategic challenges in the field?</p>	<p>Are the grantees highly networked with similar organizations or do they define their roles and approaches independently of other parts of their movements? What determines their choices in this respect?</p>
	<p>Do BUILD grantees influence the ways that power is distributed among members of a network and if so, how?</p>	<p>A major focus in this case study will be the extent to which these grassroots organizations are able to embody and reflect voice from their constituents in their relations with networks that seek to represent a wider range of constituents (and/or a narrower political agenda). Does BUILD enable the organizations to strengthen this role? Is there a trade-off if BUILD support encourages/enables the organization to strengthen its national/global engagements and thereby weakens its accountability to its members?</p>

	<p>Do these networks generate broader influence in their respective fields?</p>	<p>Do the individual grassroots member organizations contribute to a stronger voice within the networks with which they have relationships? Is BUILD contributing in any way? Is this influence about being more powerful (by representing a larger group of e.g., potential voters), or more informed (by learning from the experience and perspectives of the grassroots constituents), or something else? Here again, does the BUILD grant (inadvertently) encourage a greater focus on the broader field, at the expense of a focus on practical constituent concerns? Or is the support used to ensure that constituent concerns are reflected more a macro levels?</p>
<p>Has BUILD been organized and implemented optimally so as to achieve desired impacts?</p>		
	<p>How has the General Operating Support (GOS) component of the BUILD grant contributed to the institutional strengthening of BUILD grantees?</p>	<p>This question will partly relate to how they ensure that GOS financed services are maintained as a precondition for their constituents' ownership of the organization (e.g., access to legal services or hurricane reconstruction assistance may define how they perceive the organization). The credibility of these organizations may rely heavily on a high level of practical operations and services that benefit the constituents.</p> <p>Related to this, it will be important to assess if the GOS support has inadvertently encouraged the grantee to continue in full scale operational mode when it would be healthier to step back more and reflect on what might be a more appropriate balance and ambition.</p> <p>An interesting aspect of this (which may relate more to the following question) is whether the support to developing the capacities of informal local leaders has been enabled by the grant. We will assess whether this is covered as part of GOS or IS, as well as if/how money passes through (or is intended to pass through) to reach local leaders.</p>
	<p>Has the Institutional Strengthening (IS) component of the BUILD grant been "fit for purpose" in relation to grantees' needs?</p>	<p>This question will presumably cover similar issues to those that will arise in the networks case study, including if/how the IS support has been designed to support (in an appropriately balanced manner) the headquarters and the local/informal member organizations and groups. Is there a 'trickle down' or is the focus more centralized, and what are the implications?</p>
	<p>Have the BUILD GOS and IS funds contributed to the organizational development of BUILD grantees in ways that are different than GOS or IS funding from other sources? If so, how?</p>	<p>This is likely to relate to the questions raised above regarding the contrasting funding landscapes in the US and Global South. What is the BUILD added value in these different contexts?</p>

	<p>What is the impact of long-term, stable funding on grantees' institutional strengthening and mission impact?</p>	<p>Building on the previous question, this may relate to the extent to which the grantees have been able to use the support to gradually reposition or streamline themselves and find an appropriate and efficient level of ambition that will contribute to sustainability. There may be lessons about whether the risk (as perceived by some funders) that stability and GOS may lead to passivity should be a concern.</p>
	<p>How have the convening and technical assistance components of BUILD been utilized by grantees and to what effect?</p>	<p>TBD, most of the grantees in the proposed sample have not received much CCTA support thus far.</p>

Detailed description

This case study will focus on organizations engaging large groups of people in a grassroots manner. This will involve seeking to understand how institutional strengthening is enabling a range of organizations to work in a more impactful manner at grassroots level, promote formal and informal local leaders and build linkages between this work and more macro-level policy change. An important justification for this focus in the evaluation is to better understand how BUILD can contribute to organizations primarily working (and in most cases based) outside of the areas where Ford concentrates its nationally focused work in the US (i.e., not in New York, Washington, D.C., and San Francisco/Oakland), and with highly local engagements in the Global South.

This case study will focus on how the BUILD grant is being used to support grantees that are intentionally basing their work on voice and actions of workers, residents and leaders in the communities that they serve. Related to this, the case will look at how BUILD support is being used by these organizations to address the institutional challenges they face within decentralized structures. The evaluation will analyze the different dynamics and challenges that the grantees face given this decentralization. This may include how to bring together advocacy with providing/channeling services to their constituencies, and how they leverage their core community organizing ethos to fight structural and legal discrimination on a local level. This could shed light on how BUILD can contribute to building on organizational culture, a topic that has been emphasized by the grantees, but where the BUILD theory of change has not yet been clearly thought through or articulated. It may point to areas where BUILD needs to be adapted to alternative perspectives on what institutional strengthening means, perhaps suggesting new typologies of organizations that need to be considered. It is likely that this will include an opportunity to contrast different approaches to engagements in the political and legal/regulatory spheres, as some grantees are working with legal services, including support to immigrants and different categories of workers. Some of the sample grantees only work at a relatively local level trying to influence sub-national government institutions and policies. Others use their community work as a basis for their legitimacy in representing their constituents in engaging in advocacy at a national or even global level. This will provide opportunities to explore additional contrasts.

The sample includes opportunities to look at contrasting approaches within a similar geography. The US sample will focus on States Working Group (SWG) grantees due to that theme having been created partly to address gaps in the Ford agenda related to the links between grassroots and state/national level processes. In other respects, the sample will be diverse, including those organizing marginalized racial and ethnic groups, those which are more focused on a given sector of the economy or sets of natural resource users. The case study will include opportunities to look at how organizations led by Indigenous People in the Global South and People of Color in the US are building and organizing movements within and across different marginalized populations, including possible tensions between different marginalized groups within their constituencies.

Some of the Global South grantees operate as national or global networks. Given that the networking aspects of BUILD will be analyzed in a different case study, the focus in this case will not be on the aspects of the BUILD support to this national networking, i.e., the relationships between secretariats/hubs and their respective nodes, but rather on their grassroots engagements within a more narrowly delineated geography, i.e., within the work of a selected branch or partner office. The focus will thus be on how they operate as 'community-facing' institutions. This will require a significant investment in visits to these local offices and communities for ground truthing.

Methods will rely heavily on a Most Significant Change approach, based on interviews at both headquarters level and also with local formal or informal leaders that are being supported at community level. At headquarters level the intention will be to understand how they are acting (and what can be attributed to the BUILD grant) to re-strategize, re-structure and consolidate (or grow) their organizations to respond to a range of internal organizational issues, if and how the breadth and impact of the grassroots initiatives have changed over time (e.g., the five years of the BUILD grant), contextual factors facing the communities they serve and to link this to sub-national/national/global advocacy depending on their aims. The focus on local leaders will bring out their expectations and achievements in the relationships these individuals have with the headquarters organization to address both immediate local concerns and also have a voice at higher levels of advocacy. Where possible, these changes will be traced back to the contribution of changes described at headquarters levels related to BUILD support.

The evaluation team will visit each grantee two times in the course of the evaluation. Approximately two community level partners/leaders will be interviewed in conjunction with visits to each grantee.

Learning and communications

Given the similarities in the grassroots organizing 'ethos' within this case study, it may be a high priority for arranging a verification workshop at the end of the case study. Also, it is expected that there may be opportunities for cross learning with particular attention to the case studies on Networks, Challenging Environments and organizations historically led by People of Color. Other Ford Foundation studies such as the Learning Component for SWG are expected to provide very valuable data to triangulate findings and efforts will be made to find opportunities for sharing with the team leading that effort.

Case study template: Distance travelled

Title: Established organizations

Responsible team member: Peter

Synopsis

The focus of this case study is organizations in the BUILD grantee cohort that have been in existence for at least 15 or more years, that possess a number of characteristics that mark them as ‘established’. These may include: widespread recognition as a leader in their chosen field; likelihood that they are founding institutions in their sector; often large, complex organizations with significant bureaucratic structures in place; a proven track record of impact; diversified base of support; a high degree of strategic clarity and institutional strength; effective governance and stable staffing; and other hallmarks of sustainability (including financial - strategic reserves, endowment funds, etc.). Most will have had long-standing pre-BUILD relationships with the Ford Foundation, and in some cases were anchor Foundation grantees before BUILD came along. The case study will look at how and to what extent these organizations are leveraging the BUILD grant to further stabilize and perhaps to grow, and to further consolidate their sustainability. It will also examine the extent to which BUILD is helping established organizations that have had to change course, refresh their models or otherwise adapt to changing conditions in their respective sectors or contexts.

How learning questions will be addressed

<i>Learning questions</i>	<i>Relevant sub-questions</i>	<i>Notable features related to this case</i>
Does strengthening key institutions and networks advance (or consolidate past advances in) social justice?		
	If so, how? In what context?	How significant was the timing of the BUILD grant, especially given the long trajectories of change in established organizations? What do grantees use BUILD funding for, as compared to funding from other supporters? Do mature grantees use their grants primarily to address ‘higher-order’ priorities (such as growth and financial sustainability), or is there evidence that the BUILD grant is used to ‘fix’ long-standing organizational challenges (such as staffing, purchase of technology, etc.)? Are established organizations as relevant to the field as they were in previous iterations? Is there evidence of established organizations using their BUILD grants to strategically re-position, deepen, scale or better integrate their work?

		<p>What was the nature of the pre-existing relationship between the Ford Foundation and the grantees? To what extent has this shaped the impact of the BUILD grant?</p> <p>Does such a pre-existing relationship imply that grantees came into BUILD with established degrees of pre-existing trust and more shared common values? Does this add up to a different theory of change from the generic BUILD theory?</p> <p>We have observed that established organizations with a strong track record of impact and a footprint of changing the game in a given field will in many cases have had to re-think their mission. This is often because they have achieved their stated purpose, or because the external environment has changed substantially.</p> <p>To what extent has the BUILD grant enabled such existential reflection and changes in mission and vision among established grantees?</p> <p>Would they be able to re-position themselves and assert this relevance in the absence of a BUILD grant?</p> <p>Can BUILD be seen to in any way be contributing to prolonging the life cycle of a grantee that in reality should cease to exist?</p>
	<p>What grantee characteristics matter most?</p>	<p>Age, size and maturity of the organization?</p> <p>How do the older, more mature organizations selected for this case study compare to their younger counterparts in the 'Emerging Organizations' case study?</p> <p>Relevance and effectiveness of its governance structures? As the grantees have been around for some time, has the BUILD grant helped to break path dependency brought about by possibly ossified boards?</p> <p>Stability of its organizational structure and staffing?</p> <p>Extent to which it is focusing on consolidating programmatic/ strategic coherence and growth as opposed to internal reorganization and restructuring?</p> <p>Diversity of its funding base?</p> <p>Evidence of harnessing BUILD grant to put in place or strengthen mechanisms to ensure financial sustainability (endowments, reserve funds, etc.)?</p> <p>Evidence of resilience being strengthened by BUILD input?</p> <p>Role of other funders and their 'strategic levers' in consolidating grantee resilience/ sustainability/ leadership in the field/ impact?</p> <p>Nature of leadership transitions prior to BUILD or facilitated by BUILD grant?</p>

	<p>Under what conditions?</p>	<p>Established organizations in BUILD may operate in stable as well as unstable and/or fast-moving political and policy environments, and these conditions may impact on how effective the BUILD grant can be in consolidating the organizations' impact in social justice.</p> <p>Where do the grantees situate themselves in the policy and political communities in which they operate?</p> <p>How do they achieve influence and impact given this positionality?</p> <p>Are they more or less protected by being established and highly visible?</p> <p>How does the BUILD grant affect this positionality and the prospects for enhanced impact?</p> <p>Are there notable differences between the different cohorts and their uses of/impacts achieved with the BUILD grant? If so, what lessons can be learned?</p>
	<p>What aspects of BUILD have been most/least important for making this link</p>	<p>For each grantee, we need to be able to assess where they sit in terms of their focus on what aspects of the PYRAMID (IS goals), in relation to their position as leaders in the field fighting inequalities. As with all the other questions and sub-questions, the emphasis is on the role of the BUILD grant (IS as well as GoS components) in relation to the grantees' impact.</p> <p>[The data from such a line of inquiry could easily be visualized and would make for cross-grantee and possibly cross-case study comparison.]</p> <p>A working hypothesis could for instance be that established organizations are more likely to consolidate their growth and impact if they are able to leverage the GOS component of the BUILD grant, without being tied down by IS objectives at the bottom of the pyramid.</p> <p>This brings into play a number of questions:</p> <p>How useful or suitable was the OMT exercise (as currently constituted) to these established organizations? Had they already been through similar exercises prior to BUILD, and if so, what value did the OMT add?</p> <p>Is there a case to be made for a more nuanced tool, tailored to the different stages of organizational effectiveness and strategic clarity of different categories of grantees?</p>

		<p>How do established organizations conceive of the role, nature and value of convenings? What forms of convening do they find the most useful and effective?</p> <p>To what extent is the relationship between POs and grantees a factor in the success or otherwise of the BUILD grant?</p> <p>Are older, more established grantees more likely to be “in the driving seat”?</p> <p>How do established organizations use TA, and is it markedly different from other grantees?</p>
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How has BUILD strengthened grantees’ institutions?

	<p>Are there particular areas in the BUILD pyramid that are featured more or less in the institutional strengthening?</p>	<p>Harnessing the pyramid and deriving data that shows focus on which aspects of IS established organizations focus on (e.g. true cost recovery, HR, growth) , as opposed to other less established BUILD grantees (who might for instance focus on nitty-gritty basics such as putting in place financial systems, etc.) in relation to other more strategic objectives will help answer all these questions - see above for line of inquiry.</p> <p>Does the pyramid accommodate the full range of institutional strengthening needs and priorities of established organizations, or is there a need for different/modified pyramids depending on the organizational category?</p>
	<p>Has BUILD supported grantees to develop their strategic clarity and coherence in the effort to dismantle inequality?</p>	<p>Important to nail this down - as there seems to be a difference between how established organizations and less established organizations leverage the BUILD GOS and IS components for strategic clarity and coherence.</p> <p>Would the grantees be able to consolidate past gains and/or grow to the next level of influence in their respective fields without a BUILD grant?</p>
	<p>Did BUILD help the organization “scale” or decentralize?</p>	<p>Highly relevant question as it appears a number of established organizations face existential crises brought about by changes in the landscape, questions over their continued relevance, and pressure from above and below to revisit mandates, structure, etc.</p> <p>In such cases, did BUILD have a fundamentally transformative effect, or help the organization make more modest, incremental changes in the face of the challenges faced?</p>
	<p>How is the BUILD impact different from other donors or other types of Ford Foundation grant-making?</p>	<p>Question formulated above. Important to establish Ford’s prior relationship, types of funding and what it was used for (e.g., purchasing property) and how that provided a foundation for BUILD as a different kind of input. Ditto funding from other donors.</p>

	How have organizations strengthened essential organizational culture while undertaking major institutional changes?	In the case of older established organizations, has the IS component of the BUILD grant prompted or forced them to revisit their organizational culture?
	Are grantees becoming more resilient in relation to financial or contextual risks?	Can we assume that established organizations of long standing are more likely to have deepened their resilience, in some cases prior to the BUILD grant? If so, what value has the BUILD grant added in this regard?
Did BUILD strengthen grantees' roles in leading or taking part in networks and what have been their broader impacts?		
	If so, how?	To what extent are established organizations leading networks? Do they continue to define, shape, and influence their field? What is their evolving role within networks and the ecosystems of peer and emerging organizations? Do established organizations participate in or catalyze cross-sector networks and partnerships to achieve their mission and influence change?
	Are BUILD grantees developing stronger capacities to catalyze, lead and/or support collaborative mobilization within the fields they engage in?	If so, what are the specific capacities BUILD has helped these established organizations develop? Are there specific instances the grantees can point to where these enhanced capacities manifested themselves and were instrumental to the organization's impact?
	Have BUILD grantees elevated the work of their partners to respond to the strategic challenges in the field?	A critical question especially for established organizations that are expected to already have been leaders in their field, many with explicit mandates to build and strengthen capacity of their boundary partners (other CSOs, beneficiaries, government bodies central and decentralized, etc.)
	Do BUILD grantees influence the ways that power is distributed among members of a network and if so, how?	In this case, a notable feature of established organizations is their ability to 'crowd' in funding from diverse sources, and in some cases that funding is significant. We need to look at growth in budgets over time, sources of funding, ask whether there is a correlation with increased power of the organization, and delve into whether the grantee in question has an intentional strategy for empowering others in its sphere of influence and impact. Beyond resources, do they share credit? Do they shine light on and raise up other organizations and partners? Or do they crowd out other actors from funding, visibility or credit?

	<p>Do these networks generate broader influence in their respective fields?</p>	<p>It will be hard to measure impact, especially policy impact. We may need to speak with boundary partners/ other actors in the policy community to gather perception data about the grantee. We also need to think about how to benchmark from a baseline of sorts, to the present day, and plot a desired or expected trajectory to the end of BUILD 1.0 and beyond.</p>
<p>Has BUILD been organized and implemented optimally so as to achieve desired impacts?</p>		
	<p>How has the General Operating Support (GOS) component of the BUILD grant contributed to the institutional strengthening of BUILD grantees?</p>	<p><i>All these are fundamental questions that we need to answer, and the above questions will help us do so. We'll also need to scrutinize grantees' financial reporting and other 'hard' data, as well as derive anecdotal and other qualitative insights (including "stories of change") from the grantees and their partners - to the extent possible.</i></p> <p>This is pertinent in the case of established organization which may have larger budgets and more stable funding than smaller, leaner counterparts.</p> <p>How much does BUILD funding contribute to the grantees' overall budget, in overall terms as well as by type of support (GOS and IS versus project, for example)?</p> <p>Even if it is a small proportion of the budget (likely to be the case with established organizations), does it fill a strategic niche in their funding portfolio in relation to leveraging impact? If so, how?</p> <p>How do established organizations use the different components of the BUILD grant?</p>
	<p>Has the Institutional Strengthening (IS) component of the BUILD grant been "fit for purpose" in relation to grantees' needs?</p>	<p>Is IS less or more of a priority for established organizations?</p> <p>What is the nature of IS in established organizations, as compared to emerging organizations?</p>
	<p>Have the BUILD GOS and IS funds contributed to the organizational development of BUILD grantees in ways that are different than GOS or IS funding from other sources? If so, how?</p>	<p>Given the BUILD hypothesis that it is the combination of GOS and flexible funding for IS that is the game-changer, is it as much of a game-changer in established organizations as in emerging ones?</p> <p>Where does BUILD investment yield the most 'bang for the buck', and why?</p>
	<p>What is the impact of long-term, stable funding on grantees' institutional strengthening and mission impact?</p>	<p>Since established organizations will already have benefitted from long-term stable funding prior to BUILD, including possibly from the Ford Foundation, this question is particularly important.</p> <p>Were established organizations more likely to receive a "Straight-to-5" BUILD grant? If so, was this a viable BUILD strategy?</p>

	<p>How have the convening and technical assistance components of BUILD been utilized by grantees and to what effect?</p>	<p>Are mature, established organizations more or less likely to access the BUILD CCTA offering?</p> <p>What kinds of technical assistance do they seek from BUILD and how are these similar to or different from other grantees?</p> <p>For instance, has the OMT been as welcomed and perceived as effective by these more mature grantees?</p> <p>Is there a notable difference between how emerging organizations view the OMT vis-à-vis established ones?</p> <p>Is there a case to be made for a different tool that is less generic and more suited to established organizations?</p> <p>How do they influence and engage in the convenings? Is their expectation of convenings different from other, less-established grantees?</p>
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Detailed description

The focus of this case study is organizations in the BUILD grantee cohort that have been in existence for at least 15³ or more years, that possess a number of characteristics that mark them as ‘established’. These include:

- widespread recognition as a leader in their chosen field;
- a proven track record of impact;
- diversified base of support;
- a high degree of strategic clarity and institutional strength;
- effective governance and stable staffing; and
- other hallmarks of sustainability (including financial - strategic reserves, endowment funds, etc.).

Most will have had long-standing pre-BUILD relationships with the Ford Foundation, and in some cases were explicitly selected for BUILD because they were ‘winners’, in other words grantees deemed to have the best chance of delivering according to BUILD’s Theory of Change. The case study will look at how and to what extent these organizations are leveraging the BUILD grant to further stabilize and grow, and to further consolidate their sustainability.

Where relevant, leadership and strategy transitions will also be studied to examine the value-added or otherwise of the BUILD grant in these transitions. We hope to gain insights into important questions such as whether BUILD works best with established organizations, as opposed to start-ups/ newer/ smaller grantees, or remedial organizations that might go out of existence without a BUILD grant.

³ Note that the designation of 15 years as the effective age for established organizations is not hard and fast. While we have observed that age and longevity does hold some significance in the BUILD cohort to whether grantees are considered ‘anchor’ or ‘mission-critical’ Ford Foundation partners or not, the markers of maturity spelled out in the detailed description are more relevant to the line of inquiry for this case study.

In doing so, we recognize that the BUILD grant among established organizations may not necessarily or exclusively be used for 'higher purpose' priorities. Preliminary discussions with potential candidates have indicated that some of the most successful and oldest BUILD grantees have harnessed the grant to make basic investments that should ideally have been made much earlier.

To the extent possible, and because comparing the two could yield important learning and insights, we will aim for coherence between the approaches, methods and tools used for this case study and the 'Emerging Organizations' case study.

The approach for both case studies is primarily qualitative, and our approach of choice will therefore be Most Significant Change. This is a qualitative, participatory approach to monitoring, evaluation and learning that involves the stakeholders in all aspects of the process. We plan to use MSC to elicit qualitative data on perceptions of grantees as well as other stakeholders on the effect of the BUILD grant in strengthening the organization, and by extension in advancing its mission impact.

As highlighted above, document review will elicit quantitative data, while semi-structured interview protocols will be predominantly used to gather qualitative data in response to the questions below. We may also develop an electronic survey, drawing on the questions and sub-questions in the below table, that will be administered to a wider group of BUILD grantees.

Learning and communications

Given the imperative of coherence between the 'Established' and 'Emerging' case studies, we will prioritize learning about the conditions under which the BUILD grant works best and not so effectively. Subject to resource availability, it may be possible to bring the two case study cohorts together for a validation meeting, prior to finalizing analysis of the data gathered and finalization of the case study outputs.

Case study: Distance travelled

Title: Organizations with leadership transitions

Responsible team member: Maggie

Synopsis

The case study will explore if and how BUILD supports grantees to maximize the opportunities presented by leadership transitions (LT) and to minimize the risks associated with these significant periods of organizational change. Nearly one-quarter of BUILD grantees have recently experienced a LT or will soon be going through one; this presents BUILD with the opportunity to support its grantees at a pivotal time. The case study will look at the effect of LTs on organizations and networks in relation to their vision, strategy, organizational culture, and internal and external ways of working. The experience of participating grantees will shed light on if and how the BUILD grantmaking approach leverages LTs as moments to (among other outcomes) positively impact strategic and programmatic direction, support decisions to grow and/or consolidate, strengthen diversity equity and inclusion, develop succession planning and new leadership capabilities, and ensure sound governance structures and financial health. Several types of transitions will be explored for example when leaders of established organizations (including founders) move on, an emerging organization finds a new leader after it has become more formalized, and a grantee experiences a sudden transition possibly linked to a crisis.

How learning questions will be addressed

Note: questions are phrased in the past tense but relate equally to grantees that have recently experienced an LT, are currently going through one, or soon will be.

Learning questions	Relevant sub-questions	Notable features related to this case
Does strengthening key institutions and networks advance (or consolidate past advances in) social justice?		
	If so, how?	<p><i>Leadership transitions can be a transformational time in the life of organizations and networks (O/N) to advance social justice - presenting both opportunities and risks to grantees' fulfilling their vision for social change.</i></p> <p>Does a LT impact the capability of organizations and networks (O/N) to define and implement their efforts to advance (consolidate) social justice? If so, how and why?</p> <p>Why does the LT provide an opportunity for this that otherwise might not happen? Does the BUILD grant play any role in this and if so how?</p> <p>Does a LT enable an O/N to use GOS more intentionally for these priorities? If so, how and why?</p>

		<p>Does a LT enable an O/N to use core IS funding more intentionally for these priorities? If so, how and why?</p> <p>Is the LT affecting other changes/transitions going on in the O/N and how are those changes/transitions affecting the LT? In other words, how is the LT fitting into the larger picture of the O/N? Is build impacting this larger picture?</p>
	<p>In what context?</p>	<p><i>The broader context in which the grantee operates is likely to have at least some effect on the LT; both the internal and external contexts.</i></p> <p>Are there particular contexts in which O/Ns are better able to sustain their social justice agendas through an LT? Less able? For example:</p> <ul style="list-style-type: none"> • Different political, social or cultural contexts? • Diminishing civil society space and possible security threats? • Organizations working within networks and/or movements? • Organizations and/or networks that play a certain role in their field (e.g., capacity builder, intermediary, think tank, etc.)? <p>Are there contexts that enable O/Ns, despite the turbulence often caused by a LT, to use their BUILD grant to establish stability that enables the new leader to steer a clear course in the face of these contextual factors?</p> <p>How does the interplay of context and the particular leader impact how an O/N can advance (or consolidate) its social justice mission?</p>
	<p>What grantee characteristics matter most?</p>	<p><i>The characteristics of an O/N may make an LT a time of greater opportunity or heightened vulnerability.</i></p> <p>What kind of LT is taking place and why? For example, a long-time leader has decided to move on; a decision was made to change programmatic direction prompting an executive transition; a crisis; etc.?</p> <p>Did BUILD support enable the O/N to make a transition more smoothly? If so, why? For example, due to the stability provided by a long-term grant or the access to resources that would allow the new leader to chart out her/his new course?</p> <p>What characteristic seem to impede O/Ns from managing LTs well and why? What is being done (and what, if anything, has BUILD done) to prevent, manage and mitigate these risks?</p>

	<p>Under what conditions?</p>	<p><i>Many BUILD grantees are working in conditions that are dangerous and threatening, facing significant opposition and constant challenges, with great uncertainty and unpredictability, and/or financial instability.</i></p> <p>Do, and how do the threats and uncertainties the O/N faces influence and affect planning for, going through, and emerging from a LT?</p> <p>How do O/Ns prepare optimally for transitions when they work in these kinds of challenging conditions? Do they need specific supports?</p> <p>Does the BUILD grant enable grantees to select and support new leaders when the past/future leaders have political reputations that put the grantee in a problematic situation?</p>
	<p>What is the role of the BUILD grant in this?</p>	<p><i>A grant like BUILD may enable an O/N to plan for, go through and/or emerge from a LT in stronger shape than if the O/N did not have BUILD support.</i></p> <p>Does, and how does a BUILD grant provide a “pause in business as usual” that facilitates the possibility for reflection, learning and action that facilitates an LT?</p> <p>Does a BUILD grant support (financial, technical, thought-partnership, etc.) affect the O/Ns stability, capability and/or confidence in a way that facilitated the LT? If so, what specifically in the BUILD grant and why?</p> <p>Does this have onward effects in terms of how an incoming or just-transitioned leader pursues and manages a social justice agenda? If so, how?</p> <p>Does the BUILD grant affect how the board and/or staff pursue a social justice agenda through a LT? If so, how?</p>
<p>How has BUILD strengthened grantees’ institutions?</p>		
	<p>Are there particular areas in the BUILD pyramid that are featured more or less in the institutional strengthening?</p>	<p><i>BUILD pyramid contains key aspects of institutional strength that may enable an O/N to weather a leadership transition and use the LT for positive growth.</i></p> <p>Did the LT present an opportunity for the O/N to address a particular part of the IS pyramid that the O/N saw as a priority? For example, institutional capabilities, financial stability, etc.? If so, which one and why?</p>

		<p>How did the new leader prioritize particular aspects of IS and what were the implications of those choices?</p> <p>Did the LT present a risk for the O/N to address a particular part of the IS pyramid? If so, which one and why? How did the new leader address that?</p> <p>Has BUILD supported grantees to deal with the disequilibrium, angst and trauma that LTs can sometimes raise up or cause? Does BUILD need to do more to enable grantees to manage this well?</p> <p>Has BUILD enabled O/Ns to support departing leaders appropriately and sufficiently, and enable grantees to support the departing leadership appropriately and sufficiently?</p> <p>Has BUILD supported grantees to facilitate the engagement of staff and Board in the LT cycle? How? Does BUILD need to do more to enable grantees to manage this well?</p>
	<p>Has BUILD supported grantees to develop their strategic clarity and coherence in the effort to dismantle inequality?</p>	<p><i>IS support may play a role in how an O/N manages its social justice vision/work during a LT.</i></p> <p>Are there ways in which the various elements of a BUILD grant - as compared to other types of funding - supports or diminishes the ability of O/N to move through an LT and sustain or strengthen their social justice mission and work?</p> <p>If sample size allows:</p> <ul style="list-style-type: none"> • How did the new leader shape strategic clarity and coherence and how did (or could) BUILD impact how s/he does that across different kinds of organizations e.g., advocacy, think tank, service delivery (e.g., legal services), mobilizing and organizing, policy development? • Does BUILD support new leaders on strategic clarity and coherence across different kinds of constituency or issue, e.g., criminal justice reform or internet freedom; creative expression or community organizing? If so, how?
	<p>Did BUILD help the organization “scale” or decentralize?</p>	<p><i>LTs may affect an O/Ns decision to scale and/or decentralize, and a BUILD grant may facilitate this.</i></p> <p>Do LTs tend to catalyze scaling? Re-shape plans for scaling? In what situations does an O/Ns decision to scale affect a LT?</p> <p>Does BUILD enable (or inhibit) an O/Ns decision to scale? Does a BUILD grant enable (or inhibit) the ability of an O/N to scale?</p>

		<p>Are there examples of LTs catalyzing decentralization or scaling that turned out to be inappropriate or over-ambitious? If so, how and why? Did the BUILD grant play any role in this positively or negatively?</p> <p>When a new leader has less ties to old constituencies, does a LT affect an O/Ns thinking about whether to decentralize or move into new geographies? Does a BUILD grant affect this in any way?</p>
	<p>How is the BUILD impact different from other donors or other types of Ford Foundation grant-making?</p>	<p><i>Through the various elements of BUILD, FF seeks to build the institutional strength of O/Ns in a way that a long term GOS grant couldn't otherwise do.</i></p> <p>Which particular aspects of the BUILD grant were relevant to the LT: GOS, IS, CCTA, long-term funding commitment, other?</p> <p>Was the BUILD grant used differently than funding from other donors that the O/N applied to the LT? If so, how and why?</p> <p>Was the BUILD grant used differently than another Ford Foundation funding the O/N applied to the LT? If so, how and why?</p>
	<p>How have organizations strengthened essential organizational culture while undertaking major institutional changes?</p>	<p><i>New leaders play a central role in defining organizational culture, changing or perpetuating it, and establishing the ground-rules in organizations for respecting (or not) the culture.</i></p> <p>What are the ways in which a LT can strengthen the organizational culture of an institution? How does this happen and what can be the effects? What does this consist of?</p> <p>What are the ways in which a LT can debilitate an institution from building its organizational culture? How does this happen and what can be the effects?</p> <p>Are there certain characteristics of institutional culture that LTs are more/less likely to impact? If yes, which and why?</p> <p>Does, and how does a BUILD grant impact these aspects of a LT?</p>
	<p>Are grantees becoming more resilient in relation to financial or contextual risks?</p>	<p><i>LTs can be a time of heightened financial and contextual risk for O/Ns. LTs may also give access to new sources of funds.</i></p> <p>Did the BUILD grant strengthen the financial and/or contextual resilience of the grantee during the LT?</p> <p>Did the BUILD grant improve particular parts of the BUILD pyramid which then led to stronger financial or contextual resilience?</p> <p>Would these changes have happened without BUILD support, or with other GOS support?</p>

	<p>ADDITIONAL AREAS TO EXPLORE (to be further developed)</p> <p>Has BUILD supported grantees to move towards increased racial equity during LTs?</p> <p>Other aspects of DEI such as LGBTQI, marginalized/indigenous ethnic groups, people with disabilities?</p> <p>Other types of organizational transformation?</p>	<p>What have been the opportunities and challenges that leaders of color have experienced during major transitions, including LTs? Has BUILD supported leaders of color to lead? LGBTQI?</p> <p>Leaders from marginalized/indigenous ethnic groups? Disabled?</p> <p>Has BUILD effectively shifted the racial imbalance of leadership among grantees to greater race equity and supported them in these roles? Among and for LGBTQI? Leaders from marginalized/indigenous ethnic groups? Disabled?</p> <p>Has BUILD shifted the imbalance specifically to bring more women of color into leadership roles and support them in these roles?</p> <p>Has BUILD supported grantees to build organizational cultures of racial equity? Cultures embracing LGBTQI? Marginalized/indigenous ethnic persons? People with disabilities?</p> <p>Has BUILD supported grantees to create and test new models of leadership?</p> <p>Has BUILD supported grantees to not only successfully go through a LT, but also support the new leader to thrive?</p>
<p>Did BUILD strengthen grantees’ roles in leading or taking part in networks and what have been their broader impacts?</p>		
	<p>If so, how?</p>	<p><i>When organizations go through LT, the transitions may affect not only the organization but also the networks in which they move. This may be especially true for organizations that are central to the work of a network, and/or when several organizations in a network go through a LT at the same time.</i></p> <p>Do LTs create a time of heightened risk for networks? For example, networks that rely heavily on a particular organization’s leader who is transitioning out? If so, why and what can be done to mitigate this?</p> <p>What role can (or has) a BUILD grant play in supporting opportunity and mitigating risks?</p>
	<p>Are BUILD grantees developing stronger capacities to catalyze, lead and/or support collaborative mobilization within the fields they engage in?</p>	<p>If yes, what types or organizations? What effects do they have on the networks and why?</p> <p>What role can (or has) a BUILD grant play in supporting this?</p>
	<p>Have BUILD grantees elevated the work of their partners to respond to the strategic challenges in the field?</p>	<p>Is there something about a BUILD grant that improves the capacities of a network to respond to or optimize strategic challenges during times of transitions? If yes, what is that and why?</p>

	<p>Do BUILD grantees influence the ways that power is distributed among members of a network and if so, how?</p>	<p>Do changes in the leadership of the network secretariat influence how power is distributed among members? If yes, how and why? Is there a difference when the secretariat is led by a BUILD grantee? If yes, how and why?</p> <p>Are there particular impacts of LTs in networks when the new leaders are PoC? WoC? LGBTQI? From a marginalized/indigenous ethnic group, Disabled? If yes, how and why?</p> <p>Are there particular ways in which power is distributed and re-distributed in networks when the new leaders are PoC? WoC? LGBTQI? From a marginalized/indigenous ethnic group, Disabled? If yes, how and why?</p>
	<p>Do these networks generate broader influence in their respective fields?</p>	
<p>Has BUILD been organized and implemented optimally so as to achieve desired impacts?</p>		
	<p>How has the General Operating Support (GOS) component of the BUILD grant contributed to the institutional strengthening of BUILD grantees?</p>	<p><i>For all questions in this section, specific probes on:</i></p> <p>➔ <i>In relation to the leadership transitions specifically</i></p> <p><i>With specific reference to grantees led by: PoC and WoC, LGBTQI, from a marginalized/indigenous ethnic group, person with disabilities</i></p>
	<p>Has the Institutional Strengthening (IS) component of the BUILD grant been “fit for purpose” in relation to grantees’ needs?</p>	
	<p>Have the BUILD GOS and IS funds contributed to the organizational development of BUILD grantees in ways that are different than GOS or IS funding from other sources? If so, how?</p>	
	<p>What is the impact of long-term, stable funding on grantees’ institutional strengthening and mission impact?</p>	
	<p>How have the convening and technical assistance components of BUILD been utilized by grantees and to what effect?</p>	

Detailed description

Leadership transitions can be a turning point for organizations and networks in relation to vision, strategy, organizational culture, and internal and external ways of working. While LTs are often considered to be a time of great risk for organizations and networks, they can also be transformational, bringing important and exciting change, opportunity, growth and revitalization. Nearly one-quarter of BUILD grantees have recently experienced a LT or will soon be going through one. This points to an important opportunity for BUILD to contribute to the evolution of its grantees and to help mitigate potential challenges or crises arising from these pivotal events.

The case study will examine if and how BUILD supports grantees to maximize the opportunity of an LT to, for example, (re)define strategic and programmatic direction, determine whether to grow and/or consolidate, secure robust and functional governance structures, broaden geographic influence, strengthen diversity equity & inclusion, refine management systems, develop succession planning and new leadership capabilities (including secondary leadership), identify and recruit new leadership, and ensure financial health.

Several types of transitions will be explored, e.g., when leaders of established organizations (including founders) move on, an emerging organization finds a new leader after it has become more formalized, and a sudden transition possibly linked to a crisis. Since new leaders are often involved with new, changed, or consolidated program strategies, the case study will also look closely at the relationship between transitions and strategic direction and evolution.

Given the central role that CEOs/Executive Directors play in the life of organizations and networks, this case study will focus primarily on the transitions of CEOs/EDs. If it becomes apparent that BUILD is a feature in transitions of governing bodies and/or senior management, the Evaluation Team can consider expanding the case study accordingly.

References

1. Capturing the Power of Leadership Change. Executive Transition Management. Annie E. Casey Foundation 2004.
2. Race to Lead: Confronting the Nonprofit Racial Leadership Gap. Thomas-Breitfeld S. and Kunreuther F. Building Movement Project. 2017
3. Race to Lead: Women of Color in the Nonprofit Sector. Biu O. Building Movement Project. 2019
4. Six Strategies for Nonprofit Leadership Transition. Lipper L. and Lazarus W. SSIR. May 2017

The BUILD program is currently working with consultants to organize convenings on LTs in the Global North (Marissa leading) and the Global South (Victoria leading). The Evaluation and BUILD teams will assess if and how this case study can add value and plan for the case study accordingly to avoid duplication and reduce any burden on grantees.

- The case study may use the Most Significant Change (MSC) approach which will enable grantees to reflect on critical aspects of the LT; how and why they may have led to and/or emerged from the change in leader; the impact of critical moments, for example, on changing organizational culture, institutional capability, and mission impact; how each of these may be significant in the life of the O/N; and, if and how the BUILD grant may have played a role during the transition process.
- Critical incident analysis may be useful in illuminating how critical moments – particularly a crisis – are related to a LT. Interviews can shed light on the context of the crisis; how the crisis and LT are related; the outcomes of the critical transition for the O/N; and, if and how the BUILD grant may have played/play a supportive role.
- Possible to do a questionnaire or mini-survey of the LT cohort to gain broader insight into questions that can be generic to many or all grantees.
- Convenings, particularly the two LT convenings being planned by the BUILD team, will be key opportunities to learn the critical issues that grantees are grappling with and that they learned from planning for and/or going through an LT.

Learning and communications

The Evaluation Team will explore shared learning between this case study and the People of Color case study given the imperative to ensure racial equity among leaders of social justice institutions. Overall, leadership transitions can occur across all categories of the BUILD evaluation case studies: established; emerging; networks; grassroots; POC; and organizations working in challenging environments. As such, the evaluation will explore the varying organizational and situational contexts shaping LTs and the impacts of LTs on O/Ns while staying focused on the transition itself.

Learnings can complement the convening work of the BUILD team. Both BUILD and non-BUILD grantees will benefit from insights gained as will the broader social justice and philanthropic communities interested in leadership transitions.

Case study: Distance travelled

Title: Networks

Responsible team members: Ron and Peter

Synopsis

Networks conform to different models. One common model is the **“Hub and Spokes”** model, with a single organization managing the daily operations of the network. Another is the **“Collaborative”** model, in which coordination of the network is shared among its member organizations and there is no central hub (Creech & Ramji 2004). There are many variations in between these two models, and it can be challenging to evaluate and compare networks as a result. For the purposes of the BUILD evaluation, this case study will focus on grantees that serve as ‘hubs’ supporting, mediating and/or facilitating groups of organizations (‘nodes’) with shared values and a common commitment to bring about social change through their collective action. The case study will seek to understand the extent and effectiveness of BUILD in strengthening grantees’ institutional and programmatic capacity to serve as network ‘hubs’ seeking to advance social justice. We hope to shed light on how BUILD support impacts on the grantees’ capacity to be leaders in fighting inequalities in their respective fields and areas of focus. In doing so, the case study will also seek to provide insights into whether or not the BUILD transcends strengthening the ‘hubs’ and also strengthens the capability of partner organizations to advance social justice.

How learning questions will be addressed

<i>Learning questions</i>	<i>Relevant sub-questions</i>	<i>Notable features related to this case</i>
<p>Does strengthening key institutions and networks advance (or consolidate past advances in) social justice?</p>		
	<p>If so, how? In what context?</p>	<p>Based in initial assessment of the extent to which BUILD is strengthening the grantee as a network ‘hub’, the evaluation will trace the contribution of BUILD to grantees intentions and efforts to achieve advances in social justice. The emphasis will be on ‘footprint’ evidence – such as signs of network influence in relation to objectives (as seen in the text of norms and standards, testimonies of the network’s influence in negotiating certain outcomes, etc.). We will triangulate this with data the network or its membership may have on the perceptions of impact of policy or advocacy among its nodes.</p>

		<p>Based on review of the strategic plans (where these exist) of the networks we will seek to discern important contextual factors, including political economy questions, that condition the network's focus and ability to influence outcomes. Where strategies and plans are in place, we may also be able to derive some quasi 'baseline indicators' that highlight how the context in mind may influence intended changes.</p>
	<p>What grantee characteristics matter most?</p>	<p><i>In considering characteristics of the grantee we will look at characteristics of both the grantee (hub) and the network. Networks will be looked at in terms of Connectivity, Health, Governance and Results.⁴</i></p> <p><i>Network Governance and Connectivity:</i> A network is only as effective in delivering its mission to the extent that the rules of engagement are clear, and the membership is democratically engaged. In the same way that individual organizations in BUILD may have identified strengthening governance arrangements as a mission-critical priority, the question for networks is whether the arrangements governing their operations are ideally configured to optimize delivery against the stated mission. Linked to this is the question of how BUILD network 'hub' grantees harness the BUILD grant to improve network governance.</p> <p>How is membership defined and how are decisions taken and disputes settled? How much importance do members attach to governance as a priority dimension for mission impact? Has the IS component of the BUILD grant contributed to strengthened governance? Has the network been able to focus on improving its governance because of BUILD or despite it?</p> <p><i>Network Health (Resources, Infrastructure, Joint Value):</i></p> <p><i>Structure of the network:</i> Precise remit, mandate of the 'hub' and 'nodes' in relation to social justice impacts? Specific functions: Filtering/ Amplifying? Convening? Community building? Facilitating? Were these functions clear before or have they been influenced by the BUILD input?</p> <p><i>How does the network pull in the same direction and learn?</i> Are the networks structured to enable and encourage members to develop a common agenda and strategy for contributing to social justice?</p> <p>Does the network invest time and resources into assessing its impact? How does the network assess its impact on outcomes?</p>

4 The State of Network Evaluation by Network Impact and Center for Evaluation Innovation. July, 2014

		<p>Who funds the network and who does the network fund? Analyses will begin with a review of prevailing funding patterns pre-BUILD and then look at whether these are changing. Questions include: Do funds (BUILD or otherwise) for the network go solely to the 'hub' or are they distributed among the 'nodes'? How does re-granting happen, if at all, and on the basis of what agreements? Is there evidence of in-kind transfers of resources (e.g. for capacity building) from the 'hub' to the 'nodes'? Are any power relations issues discernible from the funding dynamics? If so, how do they impact on BUILD's effectiveness?</p> <p>Network Results: There is an assumption that BUILD grantees will be better placed to deliver if their structures and delivery mechanisms are more institutionalized, making them more sustainable. In the case of network 'hubs', the assumption to be tested is whether formal hub strengthening constitutes a pathway to greater mission effectiveness, or whether impact may be better served by less structure and greater agency among the network membership.</p> <p>Is the 'hub' more or less formal? At what stage of maturity is it? How clear are its structures, operations and objectives? How does the BUILD grant relate to formalization and maturation? Did other funding and other factors play a role in this process prior to BUILD? What value has BUILD specifically added?</p>
	<p>Under what conditions?</p>	<p>An underlying assumption is that networks operate in a variety of conditions, notably a dynamic and fast-evolving policy or advocacy agenda, constrained political environments, shrinking space, funding constraints, etc. All of these factors may impact on the effectiveness of the BUILD grant and therefore will need to be analyzed.</p> <p>What are the network's preferred modes of engagement to respond to these conditions, especially when undertaking overtly political and adversarial advocacy or technocratic, evidence-informed advocacy that is deemed less confrontational? Does the BUILD support encourage the network to be more 'daring', and if so to what effect?</p> <p>At which geo-political levels does the network primarily operate? Where does it see itself as being the most effective in contributing to social change?</p> <p>Have there been changes over time in network advocacy targets? If so, why? Has the BUILD grant been useful in enabling the network to pivot and sharpen its advocacy focus?</p>

	What aspects of BUILD have been most/least important for making this link	We will interrogate BUILD's engagement with network-related grantees around which of the BUILD strategic levers (GOS and IS grants, convenings, TA, accompaniment, etc.) has been most and least useful to network 'hubs'? How have these respective levers influenced other members of the network?
How has BUILD strengthened grantees' institutions?		
	Are there particular areas in the BUILD pyramid that are featured more or less in the institutional strengthening?	<p>A major overarching question is whether (and if so how) the BUILD grant was specifically awarded to strengthen the organization as a network 'hub'? This will be assessed through review of RGAs, grant agreements and reporting, possibly informed by OMT results if the grantees wish to share them with us. This will include review of possible progress markers of institutional strengthening related to operating as a 'hub'. Do they conform to the more generic BUILD indicators of IS progress (as spelled out in the Pyramid and subsequent elaborations, or have do they have a different character and emphasis?</p> <p>This analysis will lead to conclusions regarding how the grantees themselves have defined the parameters of building institutional capacity to serve as a network 'hub'; as well as how and in what ways has the BUILD grant helped strengthen the network 'hub'. This will include which of the strategic levers in particular has been most effective in strengthening network 'hubs.'</p> <p>The case study will also look at if, how and in what ways the BUILD grant has been able to institutionally strengthen the 'nodes' in the network. Directly (via, e.g. re-granting) or indirectly? Intentionally or by chance?</p>
	Has BUILD supported grantees to develop their strategic clarity and coherence in the effort to dismantle inequality?	To what extent has BUILD resulted in strategic clarity and coherence among grantees and how may that have diffused across the networks?
	Did BUILD help the organization "scale" or decentralize?	In addition to the above indicators and informed by quantitative data such as on size of membership, footprint, etc., we may harness relevant method and tools to visualize how the network had grown over time, and which Secretariat functions (if any) have been decentralized.
	How is the BUILD impact different from other donors or other types of Ford Foundation grant-making?	Are there any aspects of this question that are unique to networks?
	How have organizations strengthened essential organizational culture while undertaking major institutional changes?	What is a 'healthy' organizational culture for a democratic network? How are shared and diverging values, political agendas and relationships managed? How is that reflected in decision making?

	<p>Are grantees becoming more resilient in relation to financial or contextual risks?</p>	<p>Do network strategies and plans include specific benchmarks/baseline for resilience, at 'hub' as well as 'node' levels?</p> <p>How do these relate to the BUILD IS priorities grantees have developed during the OMT process and prior to BUILD?</p> <p>How does BUILD enable the 'hub' to work with the 'nodes' to manage contextual risks such as shrinking space, security risks and funder withdrawal?</p> <p>How is progress measured over time?</p>
<p>Did BUILD strengthen grantees' roles in leading or taking part in networks and what have been their broader impacts?</p>		
	<p>If so, how?</p>	<p>As indicated in the narrative part of this profile, networks rarely fit neatly under "Hub and Spokes" versus "Collaborative" models but fall somewhere in between.</p> <p>We look at how BUILD enabled the hub grantee to influence the broader network in terms of power sharing and role development.</p>
	<p>Are BUILD grantees developing stronger capacities to catalyze, lead and/or support collaborative mobilization within the fields they engage in?</p>	<p>Such evolution in network capacities may be measured via specific indicators – such as of changing relationships, evolving role of 'nodes' in contributing to and co-creating the knowledge base, evolving role of 'nodes' in coordinating or leading campaigns, previous 'hub' functions distributed to 'nodes', and so on.</p>
	<p>Have BUILD grantees elevated the work of their partners to respond to the strategic challenges in the field?</p>	<p>We will examine this question through interviews and possibly surveys of network members.</p>
	<p>Do BUILD grantees influence the ways that power is distributed among members of a network and if so, how?</p>	<p>Understanding the power dynamics of a network will be challenging, particularly as we are limiting most of our scope of inquiry to network 'hubs' – which we assume to be top of a hierarchy of network power asymmetry from the outset. However, a distinguishing feature of more democratic networks may be that there is less power asymmetry.</p> <p>Tracking the evolution of the network over time may shed important insights into how power is being distributed. We would need to examine documentation such as minutes and reports of network meetings, leadership roles assigned to specific network members, and other markers of change in power dynamics. This may include looking at decentralization and devolution.</p>

		We would also need to interrogate the funding model for different networks being studied, to shed light on how and to what extent the BUILD grant consolidates power in a single grantee designated a 'hub', or e.g., provides them with the stability need to dare to devolve power.
	Do these networks generate broader influence in their respective fields?	The question here is whether, and if so how, BUILD enhances the capability and effectiveness of the networks it supports to be more influential in their fields. This is a central assumption inherent in the BUILD Theory of Change as related to institutions, but it not well-elaborated as it relates to networks. In contrast, network theory asserts that the value of organizations cohering in networks is that they can achieve change that would not be possible by working bilaterally or individually. If BUILD led to stronger networks through the grantee 'hubs', how? If not, what type of support may have been more impactful?
Has BUILD been organized and implemented optimally so as to achieve desired impacts?		
	How has the General Operating Support (GOS) component of the BUILD grant contributed to the institutional strengthening of BUILD grantees?	TBD whether this has particular implications for networks.
	Has the Institutional Strengthening (IS) component of the BUILD grant been "fit for purpose" in relation to grantees' needs?	This will include looking at how the grantees themselves have defined the parameters of building institutional capacity to serve as a network 'hub'; as well as how and in what ways has the BUILD grant helped strengthen the network 'hub'. The case study will also look at if, how and in what ways the BUILD grant has been designed so as to institutionally strengthen the 'nodes' in the network? Directly (via, e.g. re-granting) or indirectly? Intentionally or by chance?
	Have the BUILD GOS and IS funds contributed to the organizational development of BUILD grantees in ways that are different than GOS or IS funding from other sources? If so, how?	TBD whether this has particular implications for networks.
	What is the impact of long-term, stable funding on grantees' institutional strengthening and mission impact?	TBD whether this has particular implications for networks.
	How have the convening and technical assistance components of BUILD been utilized by grantees and to what effect?	TBD whether this has particular implications for networks.

Detailed description

Supporting networks is an explicit part of the BUILD strategy. The Foundation supports organizations coordinating or belonging to networks because it considers networks pivotal to generating social change through collective action underpinned by shared values. That said, there is no unified definition within the Foundation of what a network is. This heterogeneity is reflective of wider debates on networks - those engaged with research, policy, or advocacy for social change.

An extensive literature has noted that networks conform to different models, with a range of defining features. At one end of the spectrum is the “*Hub and Spokes*” model, with a single organization managing the daily operations of the network and assuming a secretariat function. Another is the “*Collaborative*” model, where the coordination of the network is shared among its member organizations and there is no central hub (Creech & Ramji 2004). In reality, these two models signpost a diverse continuum of network forms across a variety of characteristics, including some of the following:

- Networks can be more or less formal in their structure and governance;
- They can seek change at different geo-political levels;
- They can be more or less democratic in their modes of decision-making and operations;
- They can be funded via an individual organization (the ‘hub’) or via multiple network members; and
- Their life-cycle can be time-limited or permanent depending on the reason they were established.

As a result, it can be challenging to evaluate and compare networks. It therefore makes sense to study networks on the basis of their *function* and *form* (Mendizabal 2006), as opposed to proceeding based on narrow definitions.

For the purposes of the BUILD evaluation, this case study will focus on grantees that serve as ‘hubs’ supporting, mediating or facilitating constellations (‘spokes’) of organizations (‘nodes’) with shared values and a common commitment to bring about social change through collective action. The basis on which member organizations join the network depends on the specific structure and form of governance the network has adopted (MoUs, funding agreements, charters, contracts, etc.). What all these types of networks have in common is shared values across the membership and a belief that by acting collectively they can deliver outcomes and ultimately impact social change in ways that would not be possible if the members acted individually or in bilateral alliances. We note that there are some instances where BUILD grants have been awarded to both the ‘hub’ organization and one or more ‘nodes’ in the network. While it may not be possible in this case study to draw any robust conclusions as to whether BUILD is more effective when it supports one model versus the other, we will make a point of capturing and sharing any learning on this important question.

The case study will seek to understand the role, extent and effectiveness of BUILD in strengthening grantees’ institutional as well as programmatic capacity to serve as network ‘hubs’. It hopes to shed light on how BUILD support over time impacts on the grantees’ capacity to be leaders in fighting inequalities in their respective fields and areas of focus. In doing so, the case study will also

seek to provide insights into whether or not the 'BUILD effect' is able to transcend the 'hubs' the BUILD supports, to diffuse via the 'spokes' and impact on the 'nodes'.

Although our focus in this case study is on the 'hubs', we have sought to study networks that are more, as opposed to less, democratic in their agenda-setting, decision-making and operational structures. While we cannot discern in advance the extent to which decision-making is multi-dimensional (multi-nodal) and the hub's focus is determined by its interaction with the nodes, we set out to exclude networks where one organization sets the agenda and recruits members to support it, or where one organization sets a support and assistance agenda based on its own analysis of member needs. These types of networks appear less democratic and more centralized, as most nodes only relate to the hub and not necessarily to each other. The hubs included in this case study may or may not share financial resources with nodes and vice versa.

In developing these case study typologies, we are aware of the need to differentiate between 'networks' and 'grassroots organizing' grantees. The emphasis here is on networks that are *organization-facing* - in contrast to the 'Grassroots' case study which focuses on formations that are *community-facing*. Additionally, grantees selected for the 'Networks' case study will be primarily those that work at *national level and above (sub-regionally, continentally and globally)*. Grantees that work *sub-nationally, including at community level*, will feature in the 'grassroots organizing' grantees case study.

As highlighted above, document review will elicit quantitative data, while semi-structured interview protocols will be predominantly used to gather qualitative data in response to the questions below. We may also develop an electronic survey, drawing on the questions and sub-questions in the below table, that will be administered to a wider group of BUILD grantees that - while most will not have been selected as case study candidates - work in networks or consider themselves to be networks.

There are few methodological approaches available for evaluating networks, and each has its strengths and limitations. We have settled on *Most Significant Change* - MSC (Davies, R and Dart, J, 2005), a qualitative, participatory approach to monitoring, evaluation and learning that involves the stakeholders in all aspects of the process. We plan to use MSC to elicit qualitative data on perceptions of the different stakeholders (beyond the grantees) about the efficacy and impact of the network in addressing inequalities, as well as the effect of the BUILD grant in strengthening the 'hubs' and 'nodes' of the networks, and by extension in advancing the networks' mission impact.

Learning and communications

Given the heterogeneity of the BUILD community of grantees, and the evaluative limitations this has raised, we do not intend to compare grantees or case studies. However, we do foresee opportunities to learn from each case study and identify commonalities as well as differences in the findings. As such, and in addition to convening participants to discuss our findings for each case study, we fully intend to develop a platform for sharing the learning from across the case studies - with grantees, within the Ford Foundation, and with the wider philanthropic community.

Case study: **Deep dives**

Title: **Challenging environments**

Responsible team member: Ian

Synopsis

Many BUILD grantees are facing a broad range of direct or potential threats to their work. In the Familiarization Phase, the evaluation team found indications that the “safety and security” support offered through BUILD may have grown beyond the relatively technical and infrastructural support that was initially foreseen. It became apparent that some grantees were moving towards utilizing BUILD support to engage in a more profound and self-critical rethink about how to enhance their organizational ‘culture of protection’ towards their staff, partners and constituents. Some organizations were also strengthening their support to other organizations in their fields, most notably with digital security. This case study will unpack what “safety and security” means for grantees facing a range of acute and chronic threats. This case study is expected to include threats related to digital security, crime, political harassment, legal suits, chronic or acute violence and/or natural hazards. Examples are expected to include how these threats may operate in combination, and how threats may impact grantees’ financial resilience as donor support either diminishes (due to funder risk aversion) or temporarily increases (due to influx of resources for emergency response). Each of these factors is likely to create demands for a nimble approach to institutional strengthening and programmatic adaptation that compounds already existing stresses on grantees.

Detailed description

Many BUILD grantees are facing a broad range of direct or potential threats to their work and recognize the ‘duty of care’ they hold for their staff, and their responsibility not to augment the risks faced by their partners and the communities with which they work. Findings from the Familiarization Phase of the evaluation suggest that the “safety and security” support offered through BUILD may have grown beyond the relatively technical and infrastructural support that was initially foreseen. Grantees are using BUILD support to address what they had long recognized as a grave concern, but were unable to address due to insufficient resources. Some grantees are moving towards utilizing BUILD support to engage in a more profound and self-critical rethink about how to enhance their organizational ‘culture of protection’ towards their staff, partners and constituents. A few organizations are also strengthening their support to other organizations in their fields, most notably with digital security.

This case study will unpack what “safety and security” means for grantees facing a range of acute and chronic threats, including digital security, crime, political harassment, legal suits, chronic or acute violence and/or natural hazards. Examples are expected to include how these threats may operate in combination, and how threats may impact grantees’ financial resilience as donor support

diminishes (due to funder risk aversion or increased recurrent costs) or temporarily increases (due to influx of resources for emergency response). Each of these factors is likely to create demands for a nimble approach to institutional strengthening and programmatic adaptation that compounds already existing stresses on grantees.

The Evaluation Team anticipates using critical incident analysis to understand grantees’ risks and their responses to these risks, to explore how grantees are changing their approaches to protecting staff, constituents and partners, and to examine if and how grantees are trying to influence their fields around issues of protection. The analysis will involve both interviews and small workshops in which grantees undertake after action reviews of how they have responded to threats. Discussions with grantees will involve joint reflection around the context of the hazards faced in their environments and the capacities and vulnerabilities (physical, institutional and cultural) that they have in confronting these hazards. This may also involve discussions with the grantees about if and how they conceptualize resilience as a component of their institutional strengthening efforts to respond to hazards and reduce their vulnerabilities. As such, the case study could contribute to a broader understanding of the ‘resiliences’ to which BUILD may contribute.

The BUILD team and other programs of the Foundation are emphasizing different aspects of safety and security. The BUILD team will be making particular efforts to support grantees with digital security. The MXCA office has had a strong focus on combatting impunity, which carries with it a range of risks. In countries such as Brazil and Tanzania there are growing concerns with state threats to grantees, largely related to the most acute aspects of the overall shrinking of civic space. In Indonesia, law suits have been used against grantees fighting corruption. The evaluation will follow these different aspects of work as a way of mapping how and where BUILD is contributing, with the intention of developing a more comprehensive perspective on the current and potential future role of BUILD. This may be used to raise awareness among other funders of their own inherent responsibilities when supporting organizations whose work carries a significant level of risk.

How learning questions will be addressed

<i>Learning questions</i>	<i>Relevant sub-questions</i>	<i>Notable features related to this case</i>
Does strengthening key institutions and networks advance (or consolidate past advances in) social justice?		
	If so, how? In what context?	These two questions will be addressed together based on the classic formula of Hazard X Vulnerability = Risk, i.e., how the contextual hazards they face are impinging on their internal organizational vulnerabilities, which together determines the extent and nature of their risks. The case study will look at if/how institutional strengthening reduces vulnerability and thereby enables grantees to better maneuver within the landscape of risk to achieve mission impact.
	What grantee characteristics matter most?	

	Under what conditions?	Based on the preceding question we will develop comparisons across the different landscapes of risk, and then draw conclusions around where BUILD is (or could be) making a difference.
	What aspects of BUILD have been most/least important for making this link	Explore if and how organizational nimbleness/ resilience is supported by BUILD. Also, if and how stability may enable more structured thinking about how to manage risk. Questions may include whether conventional donor modalities may increase risks by unintentionally aggravating vulnerabilities e.g., by supporting grantees to engage in risky efforts and then ending/ withdrawing support. Also whether BUILD contributes to mitigating these risks by smoothing funding and/ or increasing credibility so as to access longer-term support.
How has BUILD strengthened grantees' institutions?		
	Are there particular areas in the BUILD pyramid that are featured more or less in the institutional strengthening?	Primarily safety and security, but may suggest links to other aspects of the pyramid as noted in the following question. Some aspects of financial resilience may also be important. Strong and stable leadership and nimble but intentional strategic thinking may also be important. It will therefore be interesting to explore if/how BUILD has helped to overcome pre-existing vulnerabilities with regard to these factors, or if BUILD is most effective in challenging environments where these capacities are already in place.
	Has BUILD supported grantees to develop their strategic clarity and coherence in the effort to dismantle inequality?	This case will examine if and how strategic clarity and coherence can contribute to a 'culture of protection', based on an understanding of vulnerability generated by inequality. This aspect may be based on analysis of the steps being taken to support the constituencies of the grantees, rather than just the grantees themselves.
	Did BUILD help the organization "scale" or decentralize?	In this case, the boom-bust cycle of responding to threats is likely to be in focus (e.g., influx of funds and volunteers. increased demands/expectations, loss of attention as memories of crisis quickly dissipate). Harvey response in Texas, etc. could be examples.
	How is the BUILD impact different from other donors or other types of Ford Foundation grant-making?	See comment above re: conventional donor modalities may increase risks by unintentionally aggravating vulnerabilities. Also whether BUILD contributes to mitigating these risks by smoothing funding and/ or increasing credibility so as to access longer-term support.
	How have organizations strengthened essential organizational culture while undertaking major institutional changes?	We will define and map the elements of a 'culture of protection' including internal aspects (e.g., a duty of care), with constituents (perhaps applying elements of a 'do not harm' framework/methods) and even if/ how protection has developed further in terms of services provided.

	Are grantees becoming more resilient in relation to financial or contextual risks?	See above
Did BUILD strengthen grantees' roles in leading or taking part in networks and what have been their broader impacts?		
	If so, how?	Likely to be framed around three aspects. First, the extent to which the grantees are able to provide/ support the protection of their partner organizations. Second, whether grantees are better enabled to work with others when their entire field is under attack. Third, whether a challenging environment galvanizes resolve and collaboration across networks to respond to threats. It may be difficult to trace contribution from the BUILD grant to this third factor.
	Are BUILD grantees developing stronger capacities to catalyze, lead and/or support collaborative mobilization within the fields they engage in?	See preceding question
	Have BUILD grantees elevated the work of their partners to respond to the strategic challenges in the field?	This may be reformulated to focus more on if/how it has been possible to change the broader conversation about risk and protection and whether BUILD has contributed to this. Joint advocacy and awareness about these issues may be in focus.
	Do BUILD grantees influence the ways that power is distributed among members of a network and if so, how?	Probably N/A, but may reflect how risk influences the nature of partnerships in threatening contexts, e.g., when a 'partner' becomes a 'protector' amid human rights abuses.
	Do these networks generate broader influence in their respective fields?	As above, this may be reformulated to focus more on if/how it has been possible to change the broader conversation about risk and protection and whether BUILD has contributed to this. Joint advocacy and awareness about these issues may be in focus.
Has BUILD been organized and implemented optimally so as to achieve desired impacts?		
	How has the General Operating Support (GOS) component of the BUILD grant contributed to the institutional strengthening of BUILD grantees?	It may be interesting to tease out how these categories are differentiated given that safety and security issues are part of how programming is designed and implemented.
	Has the Institutional Strengthening (IS) component of the BUILD grant been "fit for purpose" in relation to grantees' needs?	May be related to the preceding question. We will map the safety and security investments and compare with the case study findings about the risk landscape and see if they are congruent or if there are glaring divergences. Will not be possible to quantify, but can illustrate the diversity of types of investments.

	Have the BUILD GOS and IS funds contributed to the organizational development of BUILD grantees in ways that are different than GOS or IS funding from other sources? If so, how?	See comment above re: conventional donor modalities may increase risks by unintentionally aggravating vulnerabilities.
	What is the impact of long-term, stable funding on grantees' institutional strengthening and mission impact?	This will be about the extent to which qualities related to nimbleness and resilience are fostered, and what are the outcomes.
	How have the convening and technical assistance components of BUILD been utilized by grantees and to what effect?	The outcomes from the digital security technical assistance and the indigenous peoples convening will be in focus.

Learning and communications

Given the importance of this case study in relation to informing other funders it may be appropriate to identify fora wherein the findings can be shared. Also, there may be opportunities to present as part of the work that the BUILD team will be undertaking around digital security.

Case study: Deep dives

Title: Organizations historically led by People of Color

Responsible team members: Ron, Ian and Maggie

Synopsis

This case study looks at the impact of BUILD on a set of organizations as they confront long-standing structural marginalization based on the race/ethnicity of their historic leadership. Research has shown (see references below) that organizations founded and/or historically led by people of color (PoC) in the US face a particular set of challenges:

- Bias in philanthropy
 - Toward white leadership
 - Toward seeing PoC led organizations as ‘cultural’ or ‘ethnic’ niches
- Lack of historic connections to wealth networks
- Limited relationships with donors, role models, and other types of networks helpful to success in the sector
- Blocked pipelines to executive experience in the sector

This case study may provide useful information to those seeking to understand what types of philanthropic support best contribute to the strengthening and effectiveness of PoC led organizations which have historically been marginalized from traditional funding practices. Does BUILD support contribute to more funding or funders, increased visibility and/or catalyze growth in these organizations?

How learning questions will be addressed

<i>Learning questions</i>	<i>Relevant sub-questions</i>	<i>Notable features related to this case</i>
1. Does strengthening key institutions and networks advance (or consolidate past advances in) social justice?		
	If so, how? In what context?	For this case study there are two dimensions. The first is the change in advancing social justice on the chosen cause or focus area of the organization and its primary constituency. The second is social justice among and between peers and networks in the context of systemic racism. The later refers to the sense of solidarity and equity among similar organizations in their fields.
	What grantee characteristics matter most?	

	Under what conditions?	The age of the grantee will be considered. Does the experience and impact of marginalization change over time? Is it different for younger organizations than those established further into the past but with more time to adapt? How do obstacles related to systemic racism affect this grantee and how does the grantee respond?
	What aspects of BUILD have been most/least important for making this link?	

2. How has BUILD strengthened grantees’ institutions?

	Are there particular areas in the BUILD pyramid that are featured more or less in the institutional strengthening?	What is the role of resilience in leading to growth and sustainability in these organizations? What are the pipelines of leadership (executive and governance)?
	Has BUILD supported grantees to develop their strategic clarity and coherence in the effort to dismantle inequality?	Do these organization’s strategies reflect their position in communities of color and how does that effect their access to networks of capital and revenue?
	Did BUILD help the organization “scale” or grow in a decentralized way?	How is growth supported and limited by the grantee’s identity as a PoC led organization? Does the grantees experience of racism impact their strategy for scaling and growth?
	How is the BUILD impact different from other donors or other types of Ford Foundation grant-making?	Has BUILD had any impact on amplifying historic strengths of these organizations as well as mitigating historic barriers?
	How have organizations strengthened essential organizational culture while undertaking major institutional changes?	How do grantees identify, solidify and support organizational culture in a context where employees live in a culture marginalized by mainstream culture and systems? How does this impact external facing activities and, ultimately, impact? Internal culture shifts may be an early indicator of organizational strength.
	Are grantees becoming more resilient in relation to financial or contextual risks?	What does resilience look like in an historically discriminatory environment? Are sustainability conversations different for these groups than mainstream, white-led organizations?

3. Did BUILD strengthen grantees’ roles in leading or taking part in networks and what have been their broader impacts?

	If so, how?	
	Are BUILD grantees developing stronger capacities to catalyze, lead and/or support collaborative mobilization within the fields they engage in?	Are PoC led grantees intentional about building capacity of other PoC led organizations? If so how? To what effect? What is the role of capacity building organizations? Has BUILD changed this?

	Have BUILD grantees elevated the work of their partners to respond to the strategic challenges in the field?	See above
	Do BUILD grantees influence the ways that power is distributed among members of a network and if so, how?	If not why? If so, how was this done while retaining/ supporting the core power needed to be resilient in the context of systemic racism?
	Do these networks generate broader influence in their respective fields?	If so, where was the breadth?
4. Has BUILD been organized and implemented optimally so as to achieve desired impacts?		
	How has the General Operating Support (GOS) component of the BUILD grant contributed to the institutional strengthening of BUILD grantees?	Did BUILD help PoC led organizations financially strengthen, sustainably? If so was it through recognition, network connection, providing something to 'shop around' to other donors, creating space for internal strengthening and strategic engagement of systems that were not as supportive before or other means. If not, why?
	Has the Institutional Strengthening (IS) component of the BUILD grant been "fit for purpose" in relation to grantees' needs?	
	Have the BUILD GOS and IS funds contributed to the organizational development of BUILD grantees in ways that are different than GOS or IS funding from other sources? If so, how?	Somewhere in this and the prior two questions we need to ask about the capacity development and professional growth of PoC staff. Has BUILD expanded the pipeline of trained, experienced leaders?
	What is the impact of long-term, stable funding on grantees' institutional strengthening and mission impact?	Are there internal shifts that indicated that long-term change is happening or likely to happen?
	How have the convening and technical assistance components of BUILD been utilized by grantees and to what effect?	If so, how did they address the unique challenges to PoC led organizations.

Detailed description

In the US, BoardSource's 2017 survey "Lead with Intent," found that 89 percent of nonprofit board members and CEOs are white. The color of power and the power of color in the non-profit and philanthropic sectors have been documented and commented upon in [Nonprofit Quarterly](#), [Inside Philanthropy](#) and [Chronicle of Philanthropy](#) among others.

This research has shown that organizations founded and/or historically led by PoC in the US face a particular set of challenges:

- Bias in philanthropy
 - Toward White leadership
 - Toward seeing PoC led organizations as ‘cultural’ niches
- Lack of historic connections to wealth networks
- Limited relationships with donors, role models, and other types of networks helpful to success in the sector.
- Blocked pipelines to executive experience in the sector

Communities-of-color led organizations receive only 10% of philanthropic dollars in the US despite the commitment of many philanthropies to create a more fair and equitable society. In this sense, much of U.S. focused philanthropic efforts to date have served to reproduce or reinforce the marginalization PoC led organizations.

As Vu Le observed in a recent SSIR article: “Equity is about ensuring the communities most affected by injustice get the most money to lead in the fight to address that injustice.” This is not just a matter of fairness, but it is also a matter of effectiveness. If donors are going to shift the current funding dynamic, they will need to make ‘big bets’ on PoC led organizations, especially those that have lacked access to (or been prevented from accessing) wealth that white people can more readily secure.

This case study explores whether or not BUILD’s impact on strengthening institutions and networks extends to those which face these historical challenges and philanthropic environment. And, if so, what levers of BUILD were most useful, to what extent (and how) did they mitigate the impact of historical racism on the grantee, and what changes did this contribute to in relation to mission impact.

Some important case study specific questions include:

- Can BUILD amplify the strengths of these organizations and help reduce or mitigate the historic and contextual challenges through funding and institutional strengthening support?
- Has BUILD support to networking among PoC led organizations enhanced opportunities to leverage cooperation or mutual partnership
 - with other organizations that ‘already have a seat at the table’?
 - with other organizations that have been excluded or marginalized from ‘the table.’
- Does BUILD’s influence among these organizations differ in any way from other types of grantees?
 - Should BUILD be (re)designed to better address the factors that reproduce marginalization?

We will conduct semi-structured interviews using the Most Significant Change approach to hear from grantees, their network peers and constituents where possible. We will also interview capacity building organizations focused on strengthening organizations led by PoC to gain a higher-level view of the issues faced by the grantees. Where possible, focus groups with staff of grantee organizations will explore how the organizations manage and balance support for internal culture and

external mission in the context of racism that often challenges both. These findings will be compared to interviews with peer organizations regarding grantee impact on mission and on network.

Learning and communications

Other evaluative activities underway at Ford can complement the case study and we need to coordinate with those. The findings from this case study should be considered with the learnings from the Grassroots Mobilizing case study, the tentative Indigenous Peoples vignette, Ford's States Strategy learnings and BUILD's learnings from the Indigenous Peoples and Afrodescendent convening.

The findings of this case study should also be considered with the learning from the Leadership Transition case studies where executive leadership has transitioned from white to PoC as well as the BUILD team's examination of US leadership transitions.

Methods to promote learning:

1. Ford Foundation communications and convenings
2. Using PoC led grantees who specialize in sharing learning related to organizations working in communities of color (MSC, NFG, Allied Media)
3. Verification workshop or something similar will be essential for analysis and communication of findings given the highly combustible nature of this inquiry
4. Industry blogs - NonprofitAF, Nonprofit Leadership, SSIR, Chronicle of Philanthropy, Inside Philanthropy

References

["It's Bias That Hobble People of color, Not Lack of a Leadership Pipeline" Chronicle of Philanthropy, June 6, 2017](#)

[Race to Lead: Confronting the Nonprofit Racial Leadership Gap Report 2017](#)

[Leading with Intent, 2017 by BoardSource](#)

[Funding the New Majority: Philanthropic Investment in Minority-Led Nonprofits, Greenlining Institute 2008](#)

["The State of Diversity in the Nonprofit Sector" Community Wealth Partners May 12, 2015](#)

[Equitable Bets for Marginalized Communities, SSIR, Spring, 2019](#)