

Organizational Effectiveness Partnership Projects

OE Partnership Projects are grants focused on *groups* of leaders and *cohorts* of grantees. They are developed as a collaboration between OE and Programs at the Packard Foundation, grantees and, when possible, other funders, and are designed to allow grantees to strengthen organizational capacity and learn from and connect with their peers.

Projects can target grantees within one program of the Packard Foundation, or help develop skills among grantees across programs. Examples include:

- Leadership development grants made to support the training of nonprofit leaders in group settings, including on the ability to adapt to rapidly changing environments.
- Grants made to cohorts for capacity-building efforts done in groups, including the creation of peer-learning communities, online platforms, and building of networks.

2013 marks the first year for OE Partnership Projects. We anticipate that most if not all projects in 2013 will be developed by Packard Foundation staff, in close consultation with grantees. In future years, we hope to accept proposals for Partnership Projects directly from grantees. For more details on how to suggest ideas for Partnership Projects, see “How is a Partnership Project Developed?” below.

Examples of Partnership Projects

Partnership Projects aren’t really new for OE—they’re an expansion of a grantmaking approach we’ve been piloting for several years. Below are a few examples of successful projects that are currently underway. For more information on these, please feel free to contact OE.

Unitec New Zealand

OE and the Western Pacific subprogram have collaborated on two grants to Unitec, a New Zealand university, to provide management training to conservation managers in the Western Pacific. Unitec designed a four-week curriculum, spread over one year, that has now trained 40 conservation managers from throughout Melanesia and Micronesia on team leadership, managing direct staff and volunteers, financial management, and organizational development.

Field-Building in the Gulf of Mexico

The OE and Gulf of California subprogram teams are co-developing a Capacity Building Strategy and Action Plan for Northwest Mexico with a working group of grantees and other funders. This five-year plan aims to build a network of civil society organizations to maintain coastal and marine ecosystems in northwest Mexico, through a series of capacity-building workshops, peer exchanges, coaching sessions, and consulting engagements. Approximately 25 NGOs have expressed interest in the project.

Strengthening National Networking Capacity for Children’s Health Grantees

OE has piloted the “Friending the Finish Line” project, co-designed with the Children’s Health subprogram and its grantees. Through a grant to communications firm Spitfire Strategies and social media expert Beth Kanter, 15 Children’s Health grantees from 10 different states are developing and using an integrated communications and social media strategy to engage policymakers, the media (journalists and bloggers), and parents on issues related to children’s health insurance coverage and access to care. The project also aims to develop and pilot metrics for measuring the progress of this cohort over a two year period, and ways they engage in experimentation and learning. The grantees

meet for annual in-person training, participate in monthly webinars, engage with each other through wikis and Facebook, and receive individual coaching.

Size and Scope of Partnership Projects

Partnership Projects can be designed to serve small or large groups of grantees—as few as three grantees, or as many as 20 or 25. Size and scope can vary widely depending on the needs of the grantees and the type of project. We imagine that Partnership Projects may be larger in both scope and budget than individual OE grants. Some Partnership Projects may also be multi-year grants.

Please note that given the limited funds in the OE program budget, we will be able to fund only a small number of Partnership Projects in any given year. As with all OE grants, Partnership Projects grants are competitive. All current grantees of the Packard Foundation are eligible to submit ideas, but unfortunately we are not able to support every project.

How is a Partnership Project Developed?

Step 1: Idea Exploration

Ideas for Partnership Projects can come from the Foundation, or from our grantees. Because Partnership Projects are new in 2013, we suggest that grantees with an idea begin by discussing with a member of the OE team and/or your program officer. We can give you a quick read on whether your idea is “in the ballpark,” and how we can work together to develop it. You can initiate the conversation by contacting your PO or the OE team at oepgm@packard.org.

Step 2: Develop a concept note

If the OE program and the grantee’s program officer have decided the proposed project fits within the goals and strategy of the Foundation, we will work with the grantee(s) and the program officer to draft a brief concept note of two to three pages. Concept notes should touch on the following questions:

1. What are the objectives of this project and what opportunities, challenges, or changes have led to its development at this time?
2. Whom will this project serve? Who will be involved in the design, implementation, and evaluation of this project?
3. What is success, and how will we know if we are getting there? What metrics and evaluation measures will help guide our learning from the project?
4. What are the next steps that would follow completion of the project?
5. What are the expected costs of the project?

Step 3: Identify the intermediary and invite a full proposal

Once the concept note has been agreed upon, all parties will work together to identify the most appropriate partner for carrying out the work. In some cases there may already be an appropriate partner identified.

OE will work with the agreed upon consultant or organization to submit required proposal documents including a detailed workplan, timeline and budget for the project, to move forward with recommending the grant to our Board.

Timeline for Requests

We will accept applications for Partnership Projects on a rolling basis throughout the year, as we do with individual grants. Acknowledging that Partnership Projects can be complex and take a while to develop, we encourage any grantee with an idea for a Partnership Project to contact us as soon as possible each calendar year, and when feasible, before March 31. If we exhaust our budget for Partnership Projects in a given calendar year, or if a project takes a long time to plan, it may be rolled over to the next year.

Experimental Nature of Partnership Projects

While OE already has experimented with this approach in the past, the actual designation of Partnership Projects is new. We are in a learning and adapting mode for refining these types of grants. We will invest in these projects if they are well designed. Otherwise, our limited funds will continue to be used for traditional OE grants—to one organization, to build one to two capacities at a time.

We encourage your feedback and ideas!