Collaboration Case Note

COVID-19 Funder Responses

March 2021

TAI seeks to foster collaboration between two or more members around our shared strategic priorities. Collaboration case notes document and asses the utility of such initiatives from the funder perspective.

What Problem(s) Were We Addressing?

Particularly in its early months, the COVID-19 pandemic was a source of paralyzing uncertainty for citizens, governments, and organizations alike. TAI brought funder members together to try to understand the impacts of the global health crisis on their work and respond accordingly.

Who Collaborated and How?

All of the TAI members interviewed considered this more of an ad hoc information sharing and intelligence gathering process than a collaborative initiative. The primary means of member engagement was through TAI Secretariat-convened and facilitated calls, which had varying degrees of structure. Members participated as and when they could; all members participated in at least one call. Between calls, members communicated and shared information via email, Slack, and Google Documents. The Secretariat also researched and disseminated a three-part *COVID-19 Monitor* series, included COVID updates in its TAI Weekly newsletter, published blogs on topics related to COVID, and helped organize and promote a virtual DevEx event.

> "Even though we know the collaboration is important and good, for us it felt like too much. This was just a hard year for collaboration, period."
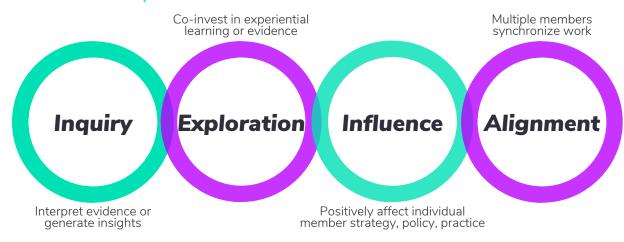>
> *-Funder member*

This information sharing and scenario planning was replicated later in the year as questions over the trajectory of the pandemic interacted with uncertainty over the outcome of the pending U.S. presidential elections. Few members, however, mentioned this as part of the same collaborative process.

What Type of Collaboration Was It?

Collaboration among members focused primarily on strategy or funding coordination (alignment), and involved members influencing each other (influence). The *COVID-19 Monitor* series and Secretariat blogs discussed and interpreted experiences and evidence.
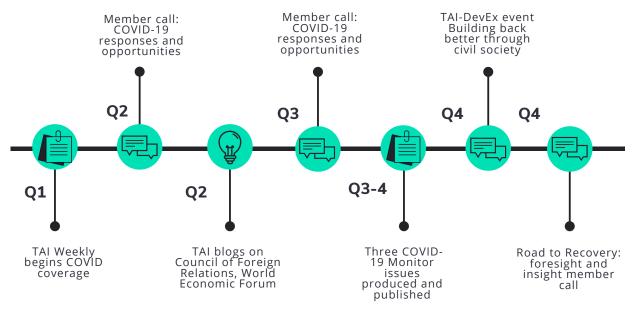
TAI Collaboration Spectrum

Co-invest in experiential learning or evidence

Multiple members synchronize work

Inquiry   *Exploration*   *Influence*   *Alignment*

Interpret evidence or generate insights

Positively affect individual member strategy, policy, practice

How Did the Collaboration Evolve?

Like the pandemic itself, collaboration on and around COVID-19 was unexpected and evolved over time; one member called it "a plane built while flying." Early on, the collaboration was internal to TAI membership. Through Secretariat-convened spaces, members discussed the pandemic and shift to virtual work life and began to share challenges and responses to supporting their grantees. The Secretariat began covering pandemic-related content in the TAI Weekly newsletter and curated and published other relevant content.

Collaboration Milestones in 2020

Member call: COVID-19 responses and opportunities

Member call: COVID-19 responses and opportunities

TAI-DevEx event Building back better through civil society

Q2

Q3

Q4

Q4

Q1

Q2

Q3-4

TAI Weekly begins COVID coverage

TAI blogs on Council of Foreign Relations, World Economic Forum

Three COVID-19 Monitor issues produced and published

Road to Recovery: foresight and insight member call

A second phase saw both internal and external reflection and analysis. In response to a Steering Committee request for more structured context analysis, the Secretariat produced and published three issues of the *COVID-19 Monitor*, each focusing on a different theme. The Secretariat also placed blogs with the Council on Foreign Relations and the World Economic Forum and contributed to events looking at longer term trends for transparency, participation, and accountability (TPA) work in the wake of COVID.

> "We were already seeing ways in which our systems had leakages that could cause people already vulnerable to be more hurt, [so it was] helpful to get out of our own heads and institution and make sure we were coming up for air."
>
> *-Funder member*

Towards the last quarter of the year, COVID-focused analysis spilled into trend watching and opportunity scanning. A draft op-ed authored by TAI's Executive Director, with input from the Ford Foundation, on the role of civil society in the pandemic recovery led to a virtual DevEx discussion on this topic. TAI helped build the speaker panel, which included the TAI Steering Committee Chair, and promoted the event.

Discussions around the pandemic's long-term impact on economic recovery also led to talk around the political sphere. Individual member institutions conducted futures and/or scenario planning. This included one institution focusing not just on an early vs late pandemic recovery, but on different outcomes of the U.S. presidential election to "anticipate how their agendas and values might be leveraged to support democracy." The Secretariat hosted space for members to share this work, however, most members did not mention this as part of the COVID collaboration process.

The extent to which each member participated in the collaboration varied. Some members recall simply joining one or two calls, while others were more active in sharing their own internal systematization of information around COVID response. One member mentioned that the Secretariat presented a broader framework for how TAI members could work together around COVID, noting "it didn't get much traction, but this isn't a bad thing."

What Have We Achieved?

The pandemic itself enabled a process of "soul searching" and data analysis that likely would not have otherwise happened. TAI was able to leverage an uncertain context to develop public-facing products, amplify its values and implement its new strategy. The three-part *COVID-19 Monitor* was an achievement in real time, and Secretariat familiarity with the data tracking software used could contribute to future analysis. Blogs on and off TAI's site and the DevEx virtual event shared perspectives and learnings as the pandemic evolved.

The ability of members to learn from each other was seen by many as an achievement. All members mentioned collaboration on grantee relations, specifically who each member was supporting and how flexibly they were responding to restrictions around the pandemic, which varied from country to country and over time. This provided a helpful sounding board for new ideas around COVID response, and may have contributed to more consistency across funders in terms of how they engaged with grantees around not just project implementation and funding allocation but, for example, self-care and safety.

Several members mentioned that they signed on to specific initiatives, such as the London Funders Group and Council on Foundations (COF) pledges to ease demands on grantees, after learning of and discussing them within the TAI-convened calls. One member was able to convince their leadership to sign the COF letter armed with the knowledge that all other TAI members had already done so.

Was the Collaboration Useful to Members?

All TAI members found the space for experience and information exchange around COVID-19 useful. Several members commented that, particularly in the early stages of the pandemic, it was valuable to simply gather virtually to see familiar faces. Most found it reassuring to hear that others were experiencing similar challenges, and inspiring to learn how they were responding.

> "We were all caught really off-guard. Helping us turn that paralysis and bridge that gap with information and clarifying our questions or interest areas was incredibly useful."
>
> *-Funder member*

While a few members would have liked to see more calls, most found the Secretariat's "light touch" convening to be a quick and effective response to member needs and felt that they got out of it what they put into it. Several members also noted that the convening and information-sharing held members accountable to their own stated intention to collaborate and co-learn around COVID.

The *COVID-19 Monitor* was not often mentioned, but those who did recall it found it useful as a foundational document, "to get the 50,000-foot view lay of land and put in context whatever else you were reading." One member commented that Open Society Foundations' (OSF) shared list of COVID-focused grantees was very helpful, and another found a joint meeting with another member and a potential grantee useful.

Most members found that this process offered an opportunity to see how they could sustainably introduce less restricted funding and fewer burdensome processes for grantees, and potentially influence other foundations to do the same. One member mentioned that their legal and grants management teams coordinated with counterparts at another member foundation. This was noted as setting a precedent for involving other parts of the foundation in these discussions and paved the way for longer-lasting changes to grantmaking practice. This reflection will continue as some institutions push for a new narrative on post-COVID recovery, and being tuned in to other funders' initiatives will remain a useful input.

Barriers to Collaboration	Enablers of Collaboration
The speed with which the pandemic and its effects evolved was overwhelming, making efforts to engage in joint planning and action with other members challenging.	Having the Secretariat available as a convener to organize and follow up on calls helped members remain accountable to their own pledges to coordinate.
The pandemic affected all members, but at different times and in different ways, which may have been a hindrance when it came to taking action.	The combination of timeliness and flexibility in the Secretariat's approach did not make participation feel like another item on the to-do list for most members.
Several members were going through or had just come out of major internal shifts, which sometimes made strategy coordination difficult.	The Secretariat's technical expertise, availability, and responsiveness on a one-on-one basis helped members feel supported in uncertain times.
TAI member representatives had differing levels of engagement, depending on availability and their roles in COVID work within their institutions. Some people invested less time when "just information sharing" became less useful.	The demand from members to come together to talk, and the diversity of member strengths and specific, urgent questions, enabled participation and support for each other in a time of great uncertainty.
	Existing relationships and trust between and among TAI members and the Secretariat created space for honest, and at times vulnerable, sharing.

Lessons Learned

A flexible structure adds enormous value. All members applauded the Secretariat's ability to pivot and adapt thoughtfully in response to member needs around the pandemic. COVID acted as a "stress test," reinforcing the flexible approach of TAI's strategic and learning framework and annual work plan. Effort and resources invested prior to the pandemic in building relationships and a collaboration infrastructure meant that TAI (members and Secretariat) could respond to this extraordinary circumstance.

Match the mode of collaboration with the moment. Most members valued the fact that coordination and communication on COVID was as-needed, timely, efficient and did not become a more formal working group. When the context is uncertain, an ad hoc, time-bound and flexible response may be the most effective.

At the same time, some members would have liked more of **a feedback loop** following the calls, especially to see if there was need or desire for follow-up conversations. Some members currently re-conceptualizing and questioning strategies and processes within their own institutions would value more organic perspective sharing and brainstorming space for collective thinking on themes such as longer-term changes to grantmaking practice. Conversely, many members either did not recall or did not use the more tangible, detail-oriented outputs from this process. For example, while members initially approved the *Monitor* concept and design, as time went on, their lack of feedback made it difficult for the Secretariat to gauge its utility. This was reinforced by the overall sense of overwhelm and uncertainty caused by the pandemic. "To be fair," said one member, "I don't know that any of us were clear on what we needed." In the absence of confirmation that it was or would be used, the Secretariat opted to conclude the series with three, rather than four, issues.

Attention to TPA issues in COVID recovery efforts is, and will continue to be, much needed. The opportunity for collaboration is not over, particularly given the unprecedented money and corollary corruption already emerging around COVID. As one member said, "[with this brain trust], why not be bolder? These discussions are huge challenges but also huge opportunities." While it was nearly impossible at the time, there may now be an opportunity to **consolidate and reflect on learnings** from the process as well as the actual data and information gathered, to inform such future work and collaboration.

> "Part of me wishes I would have had more in-depth conversations with other funders, but to be honest we were all trying to stay afloat. Intellectual work wasn't as critical, we were just trying to make sure our partners were ok."
>
> *-Funder member*