



Collaboration Case Note

Member Bilateral Support

March 2021

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

What Problem(s) Were We Addressing?

The TAI Secretariat connects directly with staff across member institutions to stay abreast of member work and needs. TAI member staff also contact the Secretariat individually to share updates, consult on early ideas or work in progress, and seek information. The extent to which TAI members make use of direct support from the Secretariat has varied due in part to uncertainty around procedure and Secretariat bandwidth to take on additional work. This case note documents an effort to establish a clear structure and parameters for Secretariat support to individual members and ensure equitable member access to these services.

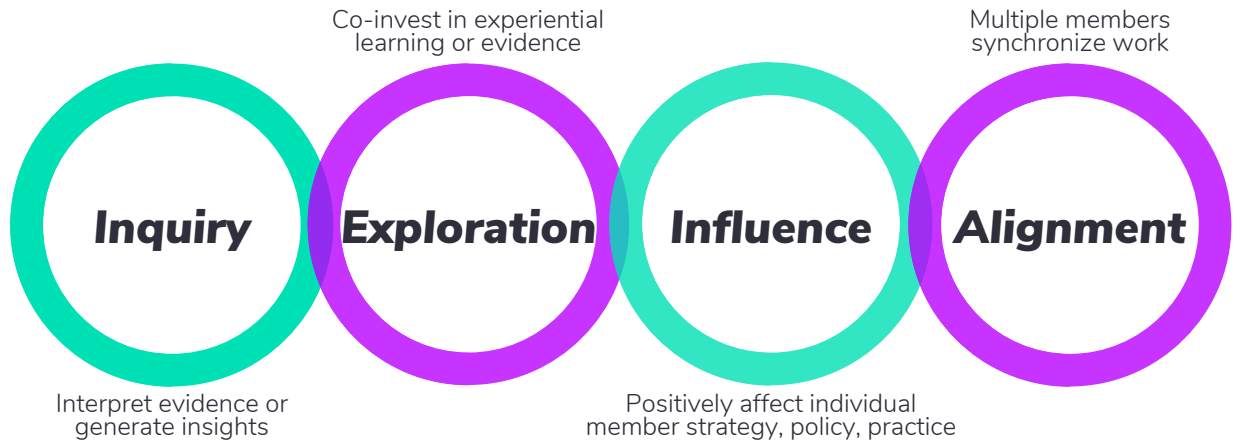
Who Collaborated and How?

Rather than an initiative undertaken by the collaborative, this is a Secretariat service offered bilaterally to the collaborative. The Secretariat established "office hours" during which staff time would be dedicated to member support requests submitted via email, text message, or Slack. Depending on the request, the Secretariat conducted rapid desk research or provided input through virtual calls and real-time messaging, as well as document review, revision and sharing. Individual support was made available to all members, including new associate member Chandler Foundation (Chandler). All members except MacArthur Foundation and the UK Foreign, Commonwealth & Development Office (FCDO) submitted at least one request during 2020.

What Type of Collaboration Was It?

The type of requests and Secretariat support provided focused mostly on member strategy or funding coordination (influence) and discussing or interpreting experience or evidence (inquiry).

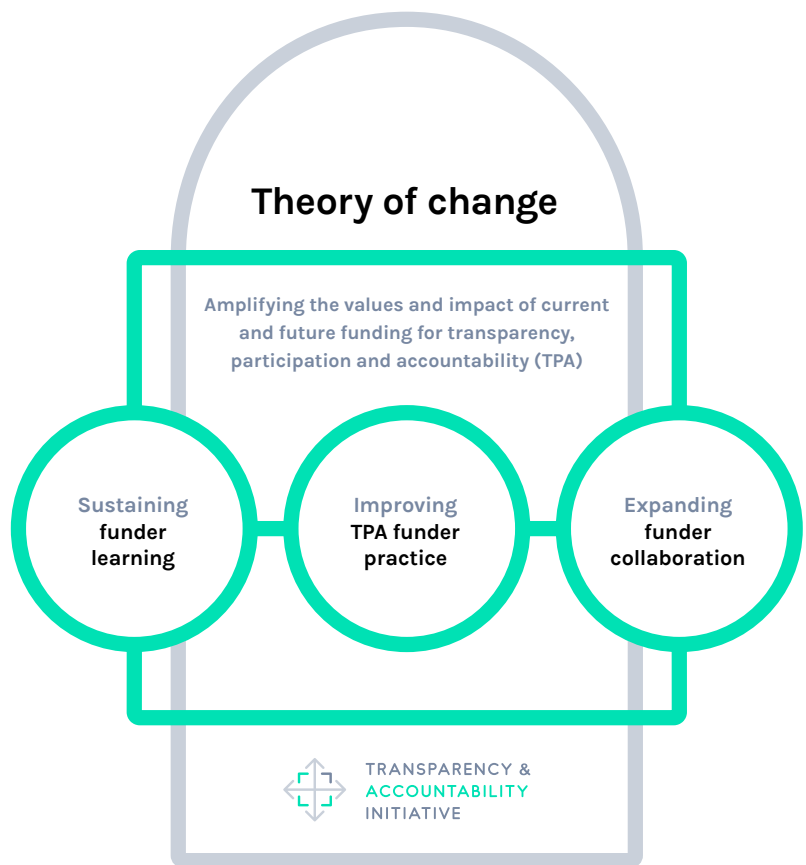
TAI Collaboration Spectrum



How Did the Collaboration Evolve?

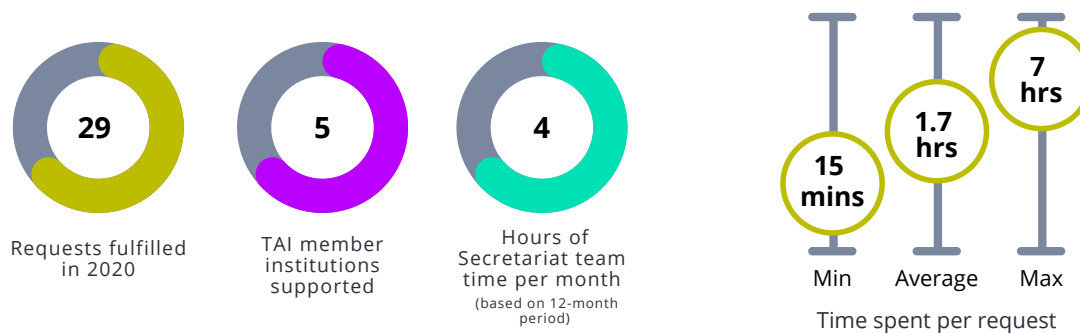
The TAI Secretariat fulfills its core functions by making opportune connections to people and expertise, curating information or opportunities relevant to members, and spotting opportunities for collaborative learning and action. The Secretariat also provides support directly to individual funder members on an as-needed basis.

At the February 2020 member retreat, the Secretariat announced it would formalize this bilateral support through the new 2020-2024 strategy period by explicitly inviting, while also attempting to limit and track, direct member requests. From February to September, Chandler, Open Society



Foundations, Luminate, William & Flora Hewlett Foundation, and Ford Foundation submitted a total of 29 support requests. Requests ranged from feedback on strategy to review of reports to desk research on a range of topics.

While the Secretariat internally tracked requests and time spent, the team did not share "usage" data with members during 2020.



"I think this is possibly one of the most helpful things TAI can do."
-Funder member

What Have We Achieved?

Formalizing the office hours approach appears to have democratized the offering, and possibly use, of this service among members. In the past, some members felt more comfortable requesting Secretariat support due to existing relationships, while newer institutional members or member staff may have been less aware this service

was available to them. Explicitly inviting these requests has made some members more likely to use the service. The open nature of the office hours also made members feel more comfortable approaching the Secretariat team with incomplete or "half-baked" ideas that could be brainstormed together.

Members gave a number of specific examples of results from this support, including:

- More robust and thoughtful program or portfolio strategy
- Strengthened terms of reference for consultants and discrete projects
- Improved grantee partner onboarding processes
- Field scoping resulting in lists of counterparts within, and research on, peer funders

3 Transparency and Accountability Initiative

Was the Collaboration Useful to Members?

Every member that used this service found it helpful in one way or another. One described it as "a really amazingly helpful helpdesk with people who I know and trust, like a helpful critical friend." At the most basic level, overstretched members appreciated the additional person hours it provides, and the clarity of knowing that the Secretariat has time carved out for this purpose. Members underscored the Secretariat's "neutral," broader view of the funding landscape as key to the value of their feedback. This ability to draw connections between and among different actors in the field helped members to frame and structure some of their ideas.

"TAI's feedback is more important to me than almost anyone else's...I almost treat them as if they are part of our team, and that serves us well."

-Funder member

Most members received different forms of support over time, using the office hours as a chance to bounce early-stage conceptual ideas off the Secretariat team for quick feedback as well as submitting requests for targeted research and writing. Strategy support was noted as particularly helpful because it relates back to the role the TAI platform plays in influencing the future direction of the transparency, participation, and accountability (TPA) field. Several members stressed the value of having a thought partner outside of their institutions provide feedback on their internal processes. Interestingly, members who did not use the service attributed this more to their own institutional culture of keeping thought work internal.

Barriers to Collaboration	Enablers of Collaboration
Members sometimes forgot that the service was available, and/or neglected to promote it within their own institutions.	Existing relationships with and trust of the Secretariat team made members more comfortable requesting support.
Member uncertainty of the Secretariat's real-time availability made some hesitate to request support. While the office hours are an explicit statement of availability, a few members still worried the team's time and resources might be overstretched.	The skill set and capacity of Secretariat team members, combined with the bird's eye view unique to TAI, results in a "full package" offering, which made members confident in the quality of analysis and insight they will receive.
	Establishing a structure for direct support helps members build a habit of consulting the Secretariat.

Lessons Learned

Raise awareness about, and remind members of, the service offering. Even members who made use of the service admitted to forgetting about it from time to time, and/or forgetting to tell others in their organization that it was available to them. One member suggested that the Secretariat update members on their balance of time and let members know when they are close to using up their time allotment.

Set clear process and timeline expectations for using the service. One member felt they may have gotten more benefit from some of the products had there been a more iterative process. Upon reflection, they treated each request as a single, helpdesk like transaction due to uncertainty about how many exchanges would be appropriate. Several members said that they were unsure how long certain requests would take, and in some cases had to follow up on the status of their request when it took longer than expected to fulfil.

Set clear expectations for the intended use of work products. Members who made multiple requests found certain products or services to be of higher quality than others. One gave the example of a document whose use was minimized because the analysis it provided was not as thorough or sophisticated as anticipated. This indicates that both requesting members and the Secretariat would benefit from clearer expectation setting as the request is received. This will help to establish a shared understanding of the timeline, and to align the scope and intended member use of the work product with Secretariat team availability and relevant skills and expertise. Another member expressed interest in requesting more long-term/in-depth research from the Secretariat.

Use bilateral service offering to create shared or collective value. The Secretariat can make usage more transparent among members, in line with the collaborative's core values. One member suggested that the Secretariat share any products they develop through office hours that might be beneficial to other members, such as literature review or grantee mapping. Sharing the substance of the requests and products, as appropriate, can also help the Secretariat and members spot opportunities for connection and collaboration.