

WEAVING SUCCESSFUL
PARTNERSHIPS

When Funders, Evaluators, and Intermediaries Work Together

A photograph of two women in a professional setting, possibly a meeting or conference. The woman on the left has long dark hair and is wearing a patterned jacket. The woman on the right has short blonde hair and is wearing a dark blazer. They are both looking towards the right side of the frame. The image is overlaid with a blue and purple gradient and a diagonal yellow-green stripe on the left side.

The aim of this report is to contribute to field dialogue and learning about how to structure complex systems change strategies involving multiple partners.

I. INTRODUCTION

Funders who have ambitious goals to change large systems often create partnerships with intermediaries and evaluators to help realize their visions. But what does it take to effectively weave these partners together and position them for shared success?

Funders regularly partner with **intermediaries** to extend their reach and impact. Intermediary organizations bring reputations and relationships that can enhance their ability to work with grantees. They commonly play a re-granting role—identifying, assessing, and providing grants to nonprofits. Beyond handling grantmaking mechanics, they play roles in program design and management, fiscal sponsorship, capacity building, and convening and coordination of a field.¹ Such partnerships can be complicated, and different models exist ranging from transactional to more strategic relationships.²

Funders also partner with **evaluators** to assess the effectiveness and impact of their investments. Historically, evaluators have applied social science methods to help funders answer questions about the impact of their programmatic investments. The role of evaluators in philanthropy has evolved, however, with many now supporting funder and grantee learning and informing program strategy. As a result, evaluators have developed new competencies and techniques that go well beyond traditional social science.³

But what happens when a funder embarks on a multi-year initiative involving an intermediary and an evaluator? The James Irvine Foundation found itself pondering that question as it embarked on a multi-year initiative involving both types of partners. While the funder, intermediary, and evaluator brought expertise relevant to supporting the success of the initiative, the partnership raised interesting dilemmas regarding roles and relationships, along with questions about how best to weave and integrate the expertise of partners.

While these three-way partnerships are common in the social sector, our initial scan of the literature mostly revealed substantive resources on two-way relationships—how funders can partner with intermediaries, and how they can partner with evaluators. **However, very few resources spoke to funder partnerships involving intermediaries and evaluators.**

It is in this context, and in a spirit of continuous learning, that the Irvine Foundation commissioned this Reflections report. The aim of this report is to contribute to field dialogue and learning about how to structure complex systems change strategies involving multiple partners.

We inform this report with a review of the literature on partnership structures, trust building, and developing a culture of learning, as well as case studies of three different initiatives involving this partnership triad, including one of the Irvine Foundation's own investments. Finally, we draw on the experience and observations of the funder and authors of this paper, all of whom have engaged in initiatives involving this constellation of relationships. We have designed this reflection to inform a variety of audiences, including stakeholders leading or participating in complex change strategies involving multiple partners, funders, intermediaries, and evaluators.

¹ David, T. (2007). Partnering with Intermediaries. Prepared for the Bill and Melinda Gates Foundation.

² Grantmakers for Effective Organizations. (2013). Smarter Relationships, Better Results: Making the most of grantmakers' work with intermediaries [slide deck].

³ Coffman, J. (2016). Oh, for the Love of Sticky Notes! The Changing Role of Evaluators Who Work with Foundations [blog post]

II. OPTIMIZING PARTNERSHIP TRIADS

Complex change strategies can benefit from the expertise of funders, intermediaries, and evaluators, in addition to community partners. But harnessing this collective expertise requires navigating and overcoming common partnership tensions.

QUESTION FOR EXPLORATION:

What are common tensions in funder-intermediary-evaluator partnerships, and how can we overcome these tensions to harness collective expertise to advance complex change strategies?

The scale and complexity of today's social problems have resulted in a shift away from supports for single organizations and toward strategies focused on improving outcomes for entire communities. The nature of this work involves coordination and collaboration among stakeholders representing diverse communities, sectors, and priorities.

Funders supporting complex change strategies often create partnerships with intermediaries and evaluators to support the work of community stakeholders. Each of these partners holds primary responsibilities in such initiatives, though roles may overlap or be collaboratively shared.

COMMON RESPONSIBILITIES OF INITIATIVE FUNDERS, INTERMEDIARIES, AND EVALUATORS

FUNDERS

- Define a vision for success
- Design and manage the funding strategy
- Ensure grantees have resources needed to achieve impact

INTERMEDIARIES

- Support design and implementation of initiative
- Provide technical assistance, advocacy, re-granting, and/or backbone support for grantee and initiative success
- Communicate implementation learnings back to funders to inform strategy adjustments and provide thought partnership

EVALUATORS

- Gather information to understand initiative process, effectiveness, and impact
- Elevate learnings and provide thought partnership with potential to accelerate progress and deepen impact

Defining these responsibilities, however, does not ensure that partnerships will be seamless and fully operational from the beginning. Because of the often-collaborative intent of partnerships and overlap in roles, there is potential for confusion. Ambiguity of responsibilities can arise in relation to how information is shared and used to support and refine strategy, inform the work of grantees, fine-tune technical assistance, and even shape current and future grantmaking and financial support. Attention to addressing and reducing ambiguity reduces duplication and promotes effectiveness and learning.

Looking across the literature, case examples, and our own experiences with this partner triad dynamic, five common tensions arose:

- » Who holds power?
- » That's my role!
- » Can I really trust you?
- » Wait, how do we communicate?
- » Impact... it's on the way!

tension #1

Tension #1: Who Holds Power?

Power dynamics are nothing new in philanthropy; *funders* control resources and therefore hold power. They decide who gets funded, for how much, and with what level of autonomy. As such, they typically hold the greatest power in funder-intermediary-evaluator partnerships.

But evaluators hold power as well. They gather information, and through analysis make judgments about what works and what challenges are emerging. They are positioned as an independent arbiter exercising influence over how success, and the factors that drive it, are viewed.

Intermediaries may hold the least power in such relationships, and often are concerned about judgments funders and evaluators are making about their work. However, intermediaries can use their content and service expertise, as well as their on-the-ground knowledge of grantees and communities, to garner authority and influence within the partnership. In some instances, the power that intermediaries hold in implementing the initiative can be quite strong, especially if they control the regranting “purse-strings.”

In the end, the structure of intermediary relationships can significantly shape power dynamics. A funder may provide resources to all parties (*Powerful Funder Scenario*), retaining a high degree of influence in these relationships. Alternatively, a funder may delegate evaluator selection and management, as well as regranting to the intermediary (*Powerful Intermediary Scenario*), positioning the intermediary to have greater influence over these parties. Finally, a funder may choose to hold the resource management role with either the evaluator or the grantees (*Shared Power Scenarios*), positioning the intermediary to have more influence over one of those parties, but not both.

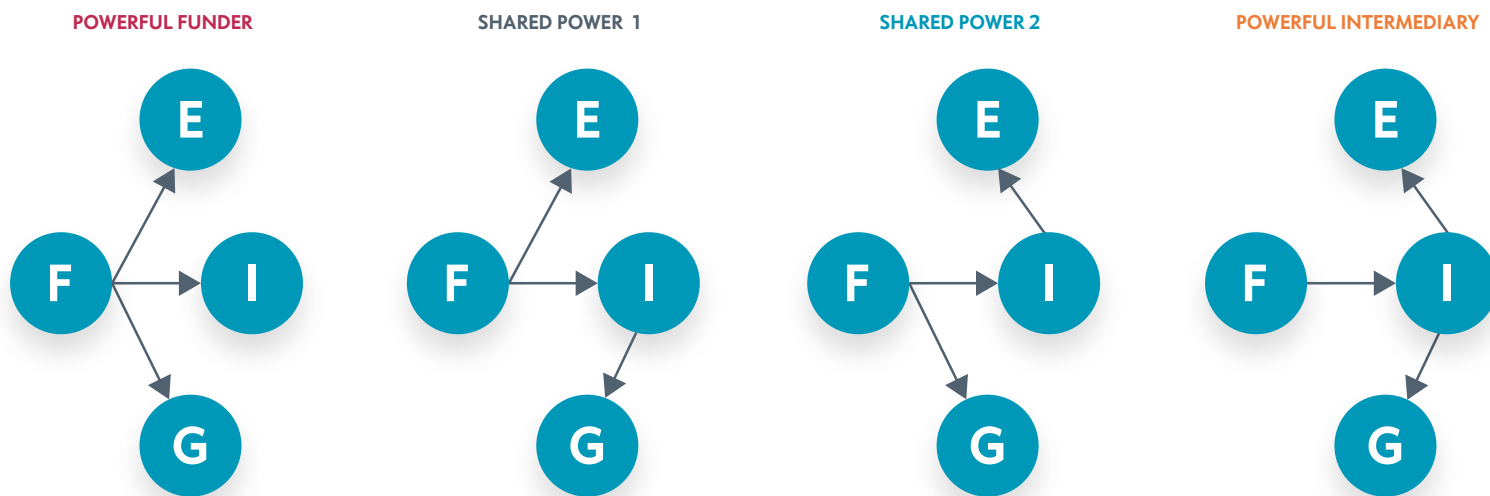
Optimization: Think Ahead about the Best Fit

Funders must consider different configurations of how resources will flow to choose the best scenario for a given funding strategy. Considerations may include:

- » The funder’s level of experience with a particular intermediary or evaluator;
- » Each party’s expertise in handling different roles;
- » The nature and focus of the evaluation learning agenda; and
- » The degree of separation desired between grantee funding and grantee capacity building.

PARTNERSHIP STRUCTURE CAN INFLUENCE POWER DYNAMICS AMONG FUNDERS, INTERMEDIARIES, AND EVALUATORS

These four scenarios depict the flow of resources among initiative partners:



F = Funders

I = Intermediaries

E = Evaluators

G = Grantees

Each scenario has different implications for power dynamics and relationships among partners:

- POWERFUL FUNDER:**
 The funder holds a high level of influence over all parties.
- SHARED POWER 1:**
 The funder holds a high level of influence over the intermediary and evaluator. The intermediary holds greater influence over grantees.
- SHARED POWER 2:**
 The funder holds a high level of influence over the intermediary and grantees. The intermediary holds more influence over the evaluator.
- POWERFUL INTERMEDIARY:**
 In this scenario, the intermediary holds a high level of influence over the evaluator and grantees.

There is no one right way to structure intermediary relationships.

There is no one right way to structure such intermediary relationships. However, it is important to consider and discuss among partners how the flow of resources shapes who holds power and the implications of that for working relationships and collaboration. When funders or intermediaries select and manage grantees and evaluators, they face two critical choices:

1. When Selecting or Managing Grantees

Tensions can arise when intermediaries hold dual roles as funders and capacity-builders of grantees. In some situations, intermediaries can play both roles effectively, for example if they know the field well, are aware of potential challenges, and have a clear division between staff who address funding and compliance and those who support capacity building. In other cases, funders may wish to separate these roles—either by managing the grant process themselves or introducing another intermediary partner.

2. When Selecting or Managing Evaluators

Evaluators are typically more aligned with the information and learning needs of those who fund and manage them. If an intermediary is driving a learning and evaluation agenda for a particular initiative, having them hire and manage the evaluator is a wise choice. Alternatively, a funder may prefer to select an evaluation partner who can provide an independent assessment of initiative effectiveness and strategic thought partnership. In this scenario, it is best for the funder to hire and manage the evaluator.

In Section 3, we examine three of the resource-flow scenarios (Shared Power 1, Shared Power 2, and Powerful Intermediary) through case examples that shed light on how partners can address issues and weave effective partnerships. Regardless of scenario, it's important to be aware of power dynamics, with the goal of supporting open and balanced partnerships.

tension #2

Tension #2: That's My Role!

Clear roles are essential to the success of all partnerships, not just those involving funders. When people work together, it helps to have agreement on who holds what responsibilities. This is no less true when funders, intermediaries, and evaluators partner with one another. For these three partners, learning and strategy comprise two central areas of role differentiation and negotiation.

- **Learning**

Within the learning process, the roles of funders, intermediaries, and evaluators differ. While funders are expected to learn from the work taking place, intermediaries and evaluators may see themselves as facilitating the learning of others. For example, intermediaries may be charged with creating a grantee learning community or cross-pollinating insights and lessons among grantees. Evaluators also strive to facilitate learning in their work, not just with funders and intermediaries, but with the grantees and communities who contribute data to evaluative efforts. Tensions can emerge over how learning is organized and who is in the lead with what audience, be it the funder, grantees, or broader field.

- **Strategy**

Who influences initiative strategy—the design and implementation of the grantmaking approach—can also be contested within the context of complex change initiatives. Funders typically develop a strategy and are accountable for its success within their foundation. At the same time, funders may share or delegate aspects of strategy management and refinement to their intermediary partners. Evaluators, too, have influence in this arena. They provide feedback on what works and what may need improvement. Those practicing developmental evaluation are selected for their expertise and strategic thinking often *specifically* to support strategy refinement.

Optimization: Continually Calibrate Roles

At the outset of a triad engagement, a conversation among partners can align expectations about roles with regard to learning, strategy, and other anticipated areas of ambiguity. However, while implementing a funding strategy and evaluation, overlap in roles or questions about responsibilities may emerge as partners fine-tune procedures, respond to needs at hand, and recognize new opportunities for (or challenges with) collaboration. Routine check-ins on areas in question provide opportunities to recalibrate, make adjustments, and ease or prevent tensions.

tension #3

Tension #3: Can I Really Trust You!

Trust is a topic with a deep theoretical and research history.⁴ Trust involves believing that someone has your best interests at heart. Without trust, it can be difficult to forge effective partnerships and foster the open dialogue needed to make complex strategies work effectively in practice. For instance:

- Intermediaries may hesitate to fully discuss the challenges they encounter in working with grantees, due to concerns about repercussions to their funding and reputational standing.
- Evaluators may express concern about sharing findings (or are ethically bound not to share) that may compromise the trust they have developed with evaluation stakeholders.
- Funders need time to develop relationships and assess how assertive they can be in providing feedback and guidance, and in discussing internal pressures relevant to the initiative.

Optimization: Build Trust Deliberately

Rather than assume partners share perspectives and goals, a partnership will benefit from establishing common ground at the start of the engagement. Ideally through face-to-face communication, partners can speak about their experiences and expectations, and listen to other members of the triad. Early conversations serve multiple purposes: setting a tone and precedent of open dialogue, bridging understanding of each player's strengths and viewpoints, and identifying opportunities for collaboration and needs for clear roles and boundaries.

Trust takes time to develop, and time is often a precious commodity when working in this partnership structure.

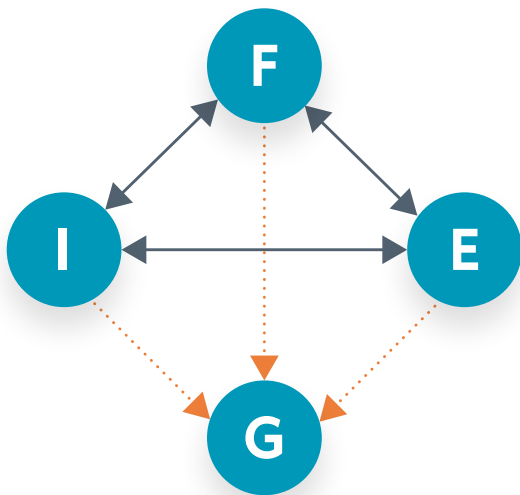
⁴Balliet, D., & Van Lange, P. M. (2013). Trust, conflict, and cooperation: A meta-analysis. *Psychological Bulletin*, 139(5), 1090-1112.

tension #4

Tension #4: Wait, How Do We Communicate?

Communication is vital to collaboration; in fact, regular communication supports the development of trust.⁵ Open dialogue among partners is essential to collaboration, and takes time, commitment, and trust to develop. Partners involved in complex change strategies often have multiple individual touchpoints with one another:

- Intermediary communicates with funder, and vice versa
- Evaluator communicates with funder, and vice versa
- Intermediary communicates with evaluator, and vice versa
- All three parties interact with grantees



There are also collective touchpoints involving constellations of different partners.

Yet even when multiple touchpoints are in place, information flow can be difficult to manage, with partners carrying out independent responsibilities that may inadvertently affect the activities of another. Often, for example, partners seek to minimize burden of time and effort on grantees, yet each requires grantee participation in capacity building efforts, grant reporting, and evaluation data collection.

A coordinated and streamlined approach smooths the grantee experience, but demands that partners communicate effectively and establish full understanding of each others' processes. Video and phone conferences are helpful, but may not successfully support deep relationship development, trust-building, and the surfacing and integration of diverse perspectives.

Optimization: Plan and Mediate Communications

During the planning stages of an engagement, not only do routine communication points need to be determined, but a partner designated to initiate them. Intermediaries often play a role in mediating communications, convening partners for project discussions. Using such meetings to build and deepen trust through open dialogue and listening can encourage partners to go beyond "comfortable" conversations to address concerns and settle differences, ultimately creating a strong partnership fabric that supports success. Starting with more frequent touchpoints establishes good communication practices, with room to pull back on frequency and formality as time goes on, balancing interaction needs with time constraints as monitored by the designated mediator.

⁵Seibert, S. E., Wang, G., & Courtright, S. H. (2011). Antecedents and consequences of psychological and team empowerment in organizations: A meta-analytic review. *Journal of Applied Psychology, 96*(5), 981–1003.

tension #5

Tension #5: Impact... It's on the Way!

Funders often expect to see results at a pace that is inconsistent with the time needed to realize systems change on the ground and the time it takes for such changes to manifest in measurable community improvements—matters of years rather than months. Funders' program staff and intermediaries alike may overstate potential impacts—or the timeline in which they can be achieved—to obtain or maintain support for a programmatic investment. Once funding has been secured, tactics quickly shift to managing expectations for impact. This dynamic places pressure on all partners, including evaluators who may be tasked with helping stakeholders such as foundation trustees understand what impacts are reasonable to expect given funding investment levels and time horizons. Rather than engaging in open and authentic conversations about the challenges of achieving population-level change, partners may engage in a so-called “cat and mouse game,” in which impact, in constant pursuit, is nearly captured but then escapes.

Optimization: For Best Results, Be Realistic

Candid discussions about hopes and realistic expectations within the timeframe of the investment and data collection are not only essential for establishing common understanding among partners, but can open the engagement to creativity and enhanced learning. All endeavors must operate within funding and time limitations. A partnership elevates its chances for greater and more perceptible impact when all parties acknowledge those parameters and maximize efforts within them. In other words, when partners avoid overpromising, they can establish a more trusting relationship, adjust implementation milestones to match on-the-ground realities, reflect more openly on learning from a position of accomplishment, take more strategic advantage of opportunities that arise, and wind up with evaluation findings that speak to achievements rather than a shortfall. For ambitious goals of broad or deep impact, involving evaluation partners at the strategy development stage helps identify options and accurate timelines for measuring longer-term change or contributions to population-level shifts.

III. INSIDE FUNDER-INTERMEDIARY-EVALUATOR PARTNERSHIPS: THREE CASES

Exploring cases of funder-intermediary-evaluator partnerships can illuminate issues that manifest in the context of different partnership configurations, as well as in strategies for managing common tensions.

QUESTION FOR EXPLORATION:

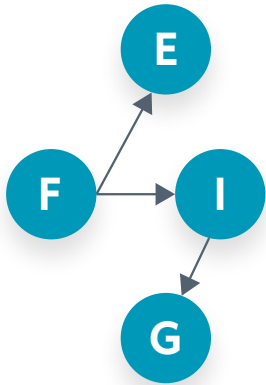
Using three cases of funder-intermediary-evaluator partnerships, how do these common tensions manifest, and what are some strategies and lessons to manage these tensions?

Our research turned up numerous examples of initiative partnerships involving funders, evaluators, and intermediaries. The following pages share the stories of three such partnerships. We selected these cases to illustrate different partner configurations and because relationships had matured to a point that allowed for open sharing of partnership benefits and challenges. The three case examples vary in terms of content, geography, investment, time span, and partner roles. Despite variation, all three partnerships encountered—and successfully navigated—relationship tensions.

These experiences offer conceptual and practical insights for others involved in similar partnerships. Representatives of partners in all three partnerships generously agreed to be interviewed for these case examples, and are quoted throughout.

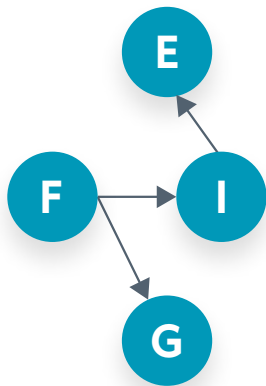
CONFIGURATION

INITIATIVE



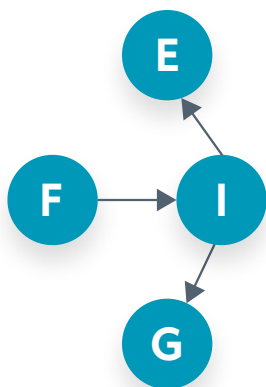
LINKED LEARNING REGIONAL HUBS OF EXCELLENCE

In 2015, [The James Irvine Foundation](#) engaged [Jobs for the Future](#) to help design and manage a cross-sector initiative to scale and elevate the quality of [Linked Learning](#), an evidence-based approach to college and career readiness. Now in its final year of implementation, [Linked Learning Regional Hubs of Excellence](#) brings together K–12 school districts, postsecondary institutions, workforce intermediaries, employers, and community-based organizations in four California communities to implement a coordinated Linked Learning strategy. It is a system change initiative supporting Irvine’s goal to increase the number of low-income youth in California who graduate from high school and achieve a postsecondary credential by age 25. The Foundation commissioned [Equal Measure](#), in partnership with [Engage R+D](#) and [Harder+Company Community Research](#), to conduct a developmental evaluation of this work.



CONSUMER VOICES FOR COVERAGE

In 2007, the [Robert Wood Johnson Foundation](#) launched Consumer Voices for Coverage (CVC) in partnership with [Community Catalyst](#). The initiative was originally created to build strong consumer health advocacy networks to move health reform forward at the state level. But with the passage of the Affordable Care Act (ACA) in 2010, health reform efforts moved from state to federal action. In response, CVC’s focus shifted to building state advocacy capacity to ensure consumer-friendly implementation of the ACA at the state level and then to support enrollment in health care coverage. Critical to this second phase of the program was the ability of grantees in 12 states to pivot their work to outreach, education, and enrollment. Community Catalyst hired [Spark Policy Institute](#) to provide training and technical assistance in evaluation to grantees and its own organization during this second phase.*



OPPORTUNITY YOUTH INCENTIVE FUND

The Opportunity Youth Incentive Fund (OYIF)—now known as the [Opportunity Youth Forum](#)—is an initiative designed to address employment and education issues for youth between 16 and 24 who are not currently in school or the workforce. The initiative is funded by a funder collaborative managed and organized by [Aspen Institute Forum for Community Solutions \(AIFCS\)](#), which manages philanthropic re-granting. The goals of the initiative are two-fold: (1) to establish strong evidence that a collective impact and community collaboration strategy can establish and deepen pathways that achieve better outcomes in education and employment, and (2) to make the case for increased adoption of this strategy as an effective model for community change. The initiative funds backbone organizations in 21 grantee communities to serve this population using a collective impact approach. [Jobs for the Future](#) assisted in the design of the OYIF, and assists with developing and leading OYIF convenings. JFF also manages re-granting and coaching/technical assistance to a subset of communities that are part of a federal [Social Innovation Fund \(SIF\)](#) project, Opportunity Works, focusing on implementation of the Back on Track pathways model. [Harder+Company Community Research](#) coordinates the grantee site lead community of practice. The initiative includes both a formative and summative community change evaluation led by [Equal Measure](#), and an implementation and impact evaluation involving the subset of SIF grantees led by the [Urban Institute](#).

Case #1

LINKED LEARNING REGIONAL HUBS OF EXCELLENCE

Partner	Organization	Role
<i>Funder</i>	The James Irvine Foundation	<ul style="list-style-type: none">• Fund, design, and manage the initiative• Hire and manage initiative intermediary• Hire and manage initiative evaluator
<i>Intermediary</i>	Jobs for the Future	<ul style="list-style-type: none">• Administer and manage grants• Convene learning community network• Provide grantee coaching and learning
<i>Evaluators</i>	Equal Measure in partnership with Engage R+D and Harder+Company	<ul style="list-style-type: none">• Conduct a developmental evaluation• Facilitate funder and intermediary learning• Support grantee learning

Partner Identification

When the Irvine Foundation first embarked on this work, program leaders anticipated the initiative would require two types of expertise.

First, the initiative needed a skilled intermediary with deep content expertise who could bring varied learning opportunities to support the development of regional infrastructure and capacity. Jobs for the Future offered relevant content expertise, experience providing technical assistance across education and workforce sectors, and the ability to administer and manage grants. Irvine was also in the process of culminating its investments in the Linked Learning educational model and viewed having a partner with a neutral perspective as an asset.

Because the initiative was testing a new strategy—translating an educational model into a regional systems approach—Irvine also saw value in commissioning a developmental evaluation to inform overall management of the initiative, and to document progress and impact. Equal Measure, Engage R+D, and Harder+Company Community Research formed a partnership to provide evaluation support to Irvine and JFF. The Foundation had pre-existing relationships with the evaluation partners and appreciation for their expertise in developmental evaluation and systems change initiatives.

Relationship Management and Development

Irvine identified and funded the intermediary and the evaluation team directly.

According to program staff, this was a common arrangement in place at Irvine. In addition, JFF would be expanding its operations in California as a result of the initiative, which might make it difficult to concurrently manage an evaluation partner. Irvine also valued having an evaluation partner that could serve as a thought partner on initiative strategy. As an Irvine representative commented, *“The upside of this configuration is that the funder can hold on to the intentionality around learning.”*

The funder played a major role in managing partner relationships and setting the tone for the initiative and learning agenda.

According to Irvine staff, JFF initially approached the relationship *“in a more traditional way—keeping the evaluation at arm’s length because it was viewed as a judgement, a performance management type of relationship. Having the funder own the relationship, repeatedly emphasizing the learning dimensions of the initiative, setting explicit expectations for learning-focused agenda items during check-in meetings, and modeling a learning and ‘risk-supportive’ disposition all helped to create a leverage point. Irvine was driven and interested in the lessons and continuous improvement cycles approach.”*

JFF appreciated the emphasis on learning, with a staff member noting, *“The funder set just the right tone to create the space for this kind of honest trust-building... [Irvine] modeled, ‘I expect you to talk to each other and I’m going to model the kind of candor we want here.’ It accelerated things.”*

The evaluation team believed that the funder’s orientation toward learning had a major influence on the dynamic among initiative partners. An evaluation team member remarked, *“[I] think it affected the dynamics in a positive way. If we were an accountability evaluator, it would create more tension, and we would be kept at arm’s-length.”*

Trust developed at a different pace among partners. Irvine and the evaluation team developed trust quickly.

Program staff had experience working with developmental evaluators and applying a continuous improvement model to their investments. Trust was slower to develop between Irvine and JFF. Irvine held high expectations for the work, and wanted to understand early on how JFF was building its capacity to support a multi-year, multi-site systems change initiative and statewide learning network. Through a series of candid communications with JFF, Irvine gained a better sense of the many different pieces that needed to be brought together and JFF’s expertise in doing so. Recognizing a misalignment between the expected speed of the initiative and the work required, program staff suggested that JFF focus on building its staff capacity and think through the arc of the work. This was a breakthrough moment in the relationship. According to a JFF representative, *“We’ve come a long way [with trust]... You have to have your tough moments and get through them productively, and then you feel like you’ve done the [necessary work] together. That builds trust.”* As discussed below, trust was also slower to build between JFF and the evaluation team.

The upside of this configuration is that the funder can hold on to the intentionality around learning.

Successes and Challenges

Reflection sessions were critical for building knowledge, trust, and the capacity of partners.

Initiative partners came together in person twice a year for day-long sessions to discuss evaluation findings, share questions and insights, and agree on upcoming priorities. According to Irvine, *“Having an evaluation partner in charge of external observations and then curating and facilitating that reflection process has been so powerful, because it’s helped build capacity of the intermediary. It’s also built our capacity, because we’re able to take that time to do the reflection, and we have an evaluation partner that is highly skilled in creating those spaces for us to reflect and be authentic.”* Each session included a social event the evening before or after the discussion, which was an important—and fun—way to build interpersonal relationships outside of the confines of the work.

The triad of partners leveraged the knowledge and expertise of each organization and strengthened learning.

According to JFF, the different perspectives that the partners brought were powerful. JFF staff noted that the partnership *“added to our capacity by exposing us to different conceptual frameworks. The evaluation team has been a great thought partner in this work, pushing on our thinking and helping us elevate patterns that we may be too close to the ground to see at different times.”*

Tensions between the evaluator and intermediary took time to overcome.

Because JFF staff were somewhat unclear about the role of the evaluation, it took time to build trust and candor with the evaluation team. According to JFF, *“It can be difficult to try to understand and behave within that kind of construct. ‘Are they trying to evaluate us? What should we tell them or not?’”* Irvine agreed, noting, *“When a funder uses an intermediary to execute work, how do you evaluate impact without necessarily evaluating [intermediary] agents?”*

Tension also emerged about roles. For example, early on, the evaluation team posed a framework for thinking about initiative strategies and outcomes. JFF staff were initially confused about whether they should act on this information by integrating it into their ongoing work. One staff member questioned where *“the line is between co-creation and thought partnering and reflecting?”*

The partners eventually had a deeper conversation, after prompting by JFF, about partner roles during an initiative reflection session and the development of partnership norms. According to Irvine, *“Smaller moments of trust-building leading up to that allowed us to all feel like we had achieved a safe space to have that [discussion] as a collective.”* JFF staff agreed, and observed that having collective conversations ensured that it *“never became a power struggle between the evaluation team and the intermediary. We’re in the same conversations together and there is no tension. The role of trust has also enabled us to talk candidly about the work.”*

Learning Notes

Early assumptions about the initiative did not always pan out. Another source of tension had to do with some of the early initiative expectations not playing out as anticipated. According to the funder, *“There was an assumption that the pace of the district-level [Linked Learning] work over the last decade would carry over to pivot to a regional approach. This was a huge assumption that didn’t play out.”* The funder also underestimated the amount of time needed for the intermediary to build its capacity in California and for grantees to develop the leadership skills to facilitate systems change work. In the end, expectations for initiative impact had to be calibrated with what grantees working on the ground considered possible. Irvine staff observed, *“As a funder, you have to check your ego... Our ambition of what we wanted to have accomplished is not as important as what sites themselves really believe can be accomplished.”*

Partners identified multiple factors that helped them successfully navigate challenges. These factors included practicing an authentic commitment to learning, bringing the triad of partners together in person on a regular basis, establishing lines of communication between the intermediary and evaluator, and demonstrating empathy and respect for each other’s roles. The funder also played a critical role in reinforcing openness by asking tough questions of both partners, as well as modeling its own struggles in answering difficult questions or navigating ambiguity. The evaluation team also contributed their facilitation skills, helping to navigate these tense moments by elevating concerns not openly articulated.

- **Work closely together from the onset to develop the initiative theory.** The evaluation team offered, *“It would have been better to have had an intimate relationship over the course of the planning phase to develop the theory of the initiative together.”* Such a process would have supported relationship-building, surfaced individual assumptions, and helped the team converge around a set of shared assumptions, to test during implementation.
- **Show humility and be an ally.** It’s important to honor the partnerships taking place on the ground between intermediaries and grantees. It’s easy for philanthropy to believe things are simple because they operate outside the ground-level work. Funders should listen, be curious, and understand as much as possible, and then help grantee organizations develop and do their best to deepen impact. Evaluators should “do no harm” by exercising caution in sharing information with potential to compromise trust and relationships—with the funder and intermediary, but also with grantees and other stakeholders.
- **Acknowledge that partnerships can be hard work—and that’s okay.** It’s important to create space where partners can discuss the challenges that come with such relationships. This is not easy when you are trying to shift to a culture of learning from one that was based on judgement, performance management, and competition. *“You want a culture that encourages risk taking, where failure can be embraced because you’re learning from failure,”* remarked the evaluator, but it takes time, effort, and a willingness to lean into discomfort.
- **Learn to LOVE your partners.** According to JFF, *“If you can get to know people and see them as people rather than in these oppositional organizations, that goes a long way to trust building, but also goes a long way in terms of how you build your relationship with them.”* Partners made time to get together over meals and drinks before and after large meetings. This informal time for socializing helped break down some of the formality and distance present in early partner interactions.

Case #2

CONSUMER VOICES FOR COVERAGE

Partner	Organization	Role
<i>Funder</i>	Robert Wood Johnson Foundation	<ul style="list-style-type: none">• Fund, design, and oversee the initiative• Administer grants
<i>Intermediary</i>	Community Catalyst	<ul style="list-style-type: none">• Manage grants• Provide technical assistance and coaching to grantees• Convene grantee learning community• Hire and manage evaluator
<i>Evaluators</i>	Spark Policy Institute [Note: Mathematica Policy Research conducted an initial evaluation; this case focuses on evaluation capacity building provided by Spark.]	<ul style="list-style-type: none">• Provide evaluation training and technical assistance to grantees• Provide evaluation technical assistance to intermediary

Partner Identification and Structure

The funder gave its intermediary latitude in oversight and subcontracting.

The Robert Wood Johnson Foundation (RWJF) funded Community Catalyst as the intermediary for grants oversight and technical assistance, including managing a national advisory committee and “keeping on top of what is happening in the field;” but RWJF awarded grants directly to all of the sites. RWJF often engages intermediary organizations to manage and oversee programs in this fashion. In its role as the National Program Office (NPO), Community Catalyst served as the initial touchpoint for grantees and determined when it was necessary to obtain guidance and advice from RWJF.

Community Catalyst helped the national review committee with site visits and proposal review, and provided grantees with technical assistance and coaching (e.g., setting up a learning community, supporting budgets, and reporting). Community Catalyst believed it was better-suited than RWJF to lead the learning community because the fast-changing nature of the advocacy environment requires grantees to move quickly.

RWJF recognized the need to build grantees' evaluation capacity. During the initial phase of this initiative, RWJF hired Mathematica Policy Research to examine grantees' work in outreach, education, and enrollment, as well as their effectiveness in pivoting to focus on those areas after the passage of the Affordable Care Act. At the time, advocacy organizations were new to having their work evaluated, and grantees initially questioned the value of evaluation relative to the perceived burden it imposed. They also questioned the value evaluation could bring to advocacy work.

During the second phase of the initiative, RWJF saw an opportunity to build grantee capacity in evaluation. Community Catalyst initially engaged Spark Policy Institute to conduct "Evaluation 101" webinars, coach Consumer Voices for Coverage (CVC) grantees, and gather feedback about the technical assistance that Community Catalyst provided. At the time, about half of the grantees were deeply focused on the expectations of the Mathematica evaluation, so Spark proceeded to provide more intensive evaluation coaching to the remaining grantees. Community Catalyst allowed this support to operate as an opt-in model, remaining sensitive to concerns about time, value, and the need to maintain focus on advocacy efforts.

Spark's role evolved to include building the evaluation capacity of the intermediary as well as grantees. As Community Catalyst saw the benefits of Spark's work with CVC grantees, they asked Spark to work directly with them as well. The goal of Spark's engagement with Community Catalyst was to build its evaluation capacity in general (not just for the CVC initiative) and to help its grantees "*figure out evaluation.*" The underlying purpose of this work was to help Community Catalyst and its grantees harness evaluation as a tool for driving more effective advocacy. Spark has served as an "evaluation coach" for Community Catalyst for about four years, and the CVC initiative was active during most of that time. Through this capacity building work, Community Catalyst moved from asking process-oriented questions to using evaluation for learning and program improvement.

Relationship Management and Development

Community Catalyst selected and managed the evaluator.

RWJF awarded a grant to Community Catalyst to subcontract to Spark and manage the evaluation capacity building process. RWJF preferred not to be directly involved with evaluation-related activities to *“keep things as clean as possible for objectivity.”* Spark communicated with RWJF on some calls, but its primary contact was Community Catalyst, which Spark characterized as a *“really strong intermediary.”* Spark noted, *“Since it was capacity building and not evaluation, there was not a whole lot of need to interface with the Foundation.”*

Spark’s limited interactions with RWJF presented some challenges over time. Because Spark’s role was evaluation capacity building, not conducting an evaluation, its primary interaction was with Community Catalyst, with little direct interface with the funder. The limited connection to RWJF had drawbacks. Spark felt unable to manage RWJF’s expectations, and to ensure RWJF recognized that it was not going to get the findings one would expect from a third-party evaluation from Spark’s evaluation capacity building work. Additionally, Spark did not have a clear sense if and when RWJF would want those results, which rendered Spark unable to communicate those expectations to grantees.

Incomplete communications was a particular concern following the rigorous Mathematica evaluation, which had placed a significant level of expectation on grantees. Spark was often asked by grantees when the *“next one was coming,”* as they were anticipating another impact study. Spark responded to those concerns by making the case to grantees that having the internal capacity to generate evaluation data, in addition to helping grantees improve their work, could also decrease the pressure on funders to use external evaluations and prepare grantees better for future impact studies.

Success and Challenges

Evaluation capacity building advanced RWJF's goal of raising the profile of advocacy funding.

The funder recognized that building evaluation capacity would enable the intermediary (and grantees) to build evidence for its model, in turn building support among other funders more broadly. RWJF acknowledged that other funders were apprehensive about funding advocacy, both because of IRS restrictions against lobbying and because of the challenge of demonstrating impact. RWJF charged the intermediary with developing and testing the initiative model and theory of change, including ensuring that their assumptions about the requisite advocacy capacities were correct. RWJF noted, *"We needed them to work with the evaluators to make sure that they understood the work and could ask the right questions."*

All three partners—funder, intermediary, and capacity builder—benefited from one another's support and expertise. According to Community Catalyst, RWJF provided strong and helpful support of the evaluation. RWJF traveled to CVC states and met with regional funders interested in this work to talk about how evaluation can be used, often including Community Catalyst in the conversations.

The relationship between Community Catalyst and Spark was also strong based on their respective regard for one another's expertise and capacities. The two organizations deepened their relationship through engaging in cross-organization capacity building: Community Catalyst built evaluation capacity and Spark deepened its advocacy expertise. The resulting partnership facilitated the work with grantees and helped to model and eventually build strong relationships with grantees, enabling them to understand the value of Spark's capacity building efforts.

Additionally, evaluation capacity building benefited grantees by allowing some to go further with evaluation and, at two sites, helping their boards manage complicated dynamics. Community Catalyst trusted Spark to share difficult information and worked with Spark to encourage grantees to follow through in addressing any challenges that emerged with respect to grantee performance and evaluation capacity.

Spark's evaluation capacity building strengthened Community Catalyst. Community Catalyst benefited from observing Spark's work with grantees and engaging in its own evaluation capacity building with Spark. As a result of its partnership with Spark, and its work with Mathematica, Community Catalyst now has its own internal evaluation team. Its staff feels more confident talking about evaluation and includes evaluation as one of the key "supporting capacities" in the organization's system of advocacy.

Earning grantees' buy-in with evaluation capacity building was the partnership's greatest challenge. Because evaluation capacity building was a resource, rather than a requirement, not all grantees engaged in the process. Some grantees cited capacity issues, competing priorities, or negative past experiences that dissuaded them from participating. Additionally, as advocacy-focused organizations, some grantees did not see the value of evaluation capacity building. Through the facilitation of Community Catalyst as a trusted intermediary, grantees that engaged with Spark came to see the benefit of capacity building. As Community Catalyst put it, *"To do that work and to have grantees define their own evaluation questions was really important and different."* Others, though, did not fully adopt this stance.

Learning Notes

- **Setting clear, shared expectations of roles from the beginning—and revisiting them as the work evolves—is key to the success of triad relationships.** One important issue for partners to agree on is who makes final decisions about the evaluation, including what gets shared and with whom. Spark recommended making that decision as a group and clearly communicating it up front. Similarly, Community Catalyst recommended setting up expectations with grantees early about what is expected of them and investing in processes to build trust, such as defining what is evaluated and creating a shared understanding of the theory of change.
- **Content expertise builds credibility.** Although some initiative grantees eventually valued the role of evaluation in their work, it took time to build. One hurdle was the perception that evaluators lacked an on-the-ground understanding of advocacy, and grantees sometimes noted that evaluation unfairly required them to justify their work. With Spark, a smoother relationship was possible because, through its partnership with Community Catalyst, Spark developed a knowledge of advocacy that earned it early credibility with grantees.
- **Building demand and muscle for evaluation takes time.** Evaluation is not necessarily valued equally by funders, intermediaries, and grantees. Simply describing the potential impact of evaluation on their work may not be enough to earn buy-in. But experiencing an evaluation can help grantees develop an appetite for the hard work of building performance management capacity. Community Catalyst’s approach of having grantees opt-in for evaluation technical assistance worked well in this context by taking advantage of grantees who were more interested in building evaluative capacity—though one consequence of the approach was that not all organizations benefited from Spark as a resource for building capacity.
- **When intermediaries hire evaluators, they have more influence in setting the evaluation learning agenda.** Community Catalyst, as intermediary, was authorized by RWJF to hire Spark and set its agenda, giving Spark the flexibility to adjust that agenda. Initially, the intermediary focused on gaps in grantee evaluation capacity. Over time, however, Community Catalyst saw the value of building its own capacity to measure, understand, and communicate its impact.

To have grantees define their own evaluation questions was really important and different.

Case #3

OPPORTUNITY YOUTH INCENTIVE FUND (OYIF)

Partner	Organization	Role
<i>Funder</i>	Collaborative of 34 regional and national funders	<ul style="list-style-type: none"> • Provide funding support for the initiative • Participate in a funder learning community
<i>Intermediary</i>	Aspen Institute Forum for Community Solutions	<ul style="list-style-type: none"> • Administer and manage philanthropic grants • Manage the funder learning community • Hire and manage initiative formative and summative evaluator • Design and lead grantee learning community
<i>Intermediary</i>	Jobs for the Future	<ul style="list-style-type: none"> • Provide technical assistance and coaching to seven communities in Opportunity Works • Assist with design and delivery of grantee learning community • Administer and manage Social Innovation Fund grants • Hire and manage SIF evaluator
<i>Intermediary</i>	Harder+Company Community Research	<ul style="list-style-type: none"> • Provide Community of Practice support • Guide grantee peer-to-peer learning sessions
<i>Evaluators</i>	Equal Measure	<ul style="list-style-type: none"> • Conduct a formative and summative community change evaluation of the OYIF • Inform funder and grantee learning communities
<i>Evaluators</i>	Urban Institute	<ul style="list-style-type: none"> • Conduct SIF implementation and impact evaluation • Inform funder and grantee learning communities

Partner Identification and Structure

The Opportunity Youth Incentive Fund (OYIF) is a large, complex social change effort involving multiple funders, intermediaries, local partners, and evaluators.

Opportunity Works—the Social Innovation Fund project—complemented OYIF with a focus on a subset of OYIF grantees seeking common outcomes related to youth education and employment pathway completion. This case study focuses on OYIF as the primary initiative. Each of these partner categories is described below.

- **Funders.** OYIF is funded by a collaborative of funders managed and overseen by AIFCS. The OYIF funders, in addition to investing in the initiative, participate in a learning collaborative focused on collective impact and field building.
- **Intermediaries.** AIFCS and JFF are the primary intermediaries for this initiative. AIFCS leads the initiative and is a funder and fiscal intermediary, playing a central role in designing the initiative and creating the RFP for selecting grantees. AIFCS administers grants, facilitates the funder learning collaborative, and shapes the learning agenda among grantees. JFF is an implementation partner, though it also operates as a funder intermediary for a subset of grantees receiving federal SIF funding. JFF works with the SIF grantees to implement career pathways and evidence-based practices, and helps with the design and execution of grantee convenings. Harder+Company Community Research supports AIFCS' national learning agenda, group and peer practice exchange sessions, and application of learning and evaluation across the network of sites.
- **Evaluators.** To assess the collective impact of OYIF, AIFCS engaged Equal Measure to conduct a formative and summative community change evaluation. The role of the evaluator has been multi-faceted—documenting progress and promising practices, serving as a critical friend and advisor, contributing to learning agendas, and supporting “case-making” regarding collective impact as a viable approach for helping opportunity youth. JFF hired the Urban Institute to conduct an implementation and impact evaluation of the seven SIF sites.

Partnership structure was driven by multiple roles AIFCS needed to play, including managing the funder collaborative, supporting initiative implementation, and providing national thought leadership. For OYIF, the structure of the partnership was driven in part by the funder collaborative arrangement, with numerous funders contributing to one goal. To make this complex partnership work, AIFCS became the fiscal intermediary, but also an intermediary focused on developing a strong learning agenda, monitoring collective impact, and building and maintaining a national Opportunity Youth agenda as part of its thought leadership position. As AIFCS describes, “*We have a dual approach to how we think about supporting or re-granting to communities that goes beyond just making grants and wanting to track and measure progress. We also truly want to create a learning space that not only [tracks] the impact and progress that communities are making, but also helps them work through challenges.*” The learning space is a critical component of the thought leadership role AIFCS plays, while also providing critical information to funders and grantees about implementation progress.

Past relationships and areas of expertise influenced partner selection. AIFCS selected Equal Measure because it had an existing positive working relationship with the firm. Equal Measure also brought deep content knowledge and a similar approach to establishing a culture of learning. AIFCS engaged JFF because of its expertise in implementing career pathways for Opportunity Youth. AIFCS also brought in Harder+Company, having had positive experience with the firm in developing national place-based conferences. This initiative led to JFF's application for the SIF grant, and Urban Institute was hired because of its understanding of the population and its expertise in conducting mixed-methods implementation and impact evaluations as required by the federal program.

Relationship Management and Development

AIFCS sees itself as the linchpin for managing communication among all partners.

The organization's leadership manages the relationships among its partners and grantees at a national level to reduce the burden on the grantees and ensure the work of the intermediaries and evaluators serves the interests of grantee communities as much as possible. As AIFCS describes, *"We try our best to ensure a right-sized connection to an engagement with communities, because communities actually know and understand their own challenges and have a really good sense of how it all needs to move forward. At the national level, we try our best to be attentive to those challenges, because we feel it's incumbent upon us, so we are not driving communities crazy."*

Success and Challenges

Having many partners accelerates AIFCS' responsiveness to grantees' learning and capacity building needs.

One example of a partner providing actionable information is Equal Measure's input toward AIFCS' evolving learning agenda. Equal Measure staff noted, *"We have played a more significant role in learning than when we first joined. We know the communities better, we have more data, we have built trust with both the communities and AIFCS... We've given AIFCS some really useful things."*

Moreover, Equal Measure has supported strategy development based on insights from the evaluation. Harder+Company's Community of Practice support has played a similar role. Through frequent digital and in-person contact with grantees, including regular feedback surveys, Harder+Company has provided a consistent flow of information to support AIFCS strategy development and response to grantee requests.

When learning is a strong focus, technical assistance and evaluation roles become intertwined. As Equal Measure noted, *"An intermediary or a technical assistance provider is generally always interested, by default, in learning and application... And the closer to learning an evaluator is... the more potential you have for confusion about roles, and lack of role clarity, because the more it looks like technical assistance."*

There are at least five organizations involved in supporting learning as part of this initiative, though they draw on different interactions and data sources. Nonetheless, having so many partners can make navigating roles challenging.

Despite partners' diverse skills and varied perspectives, the initiative's complex structure is challenging. AIFCS, high-powered and well-connected, brings national visibility to the Opportunity Youth agenda. JFF contributes content knowledge, an intervention model, and an understanding of how to build leadership in communities. Evaluators and the Community of Practice help communities see the bigger picture, normalizing dynamics in communities that had troubled site leads. The biggest challenge is the large and complicated structure of the initiative. With help from JFF on managing the SIF evaluator, AIFCS coordinates the needs, roles, and communication of multiple funders, intermediaries, evaluators, and numerous grantees.

Funder expectations of demonstrated impact do not always align with the initiative's pace and the scope of the evaluation. Challenges can emerge with showing impact while managing the cost of rigorous evaluation and the ample time needed for measureable impact to emerge.

Both AIFCS and JFF consider one of their intermediary roles as providing a buffer between funders' expectations for impact, grantees' ability to deliver, and the evaluator's ability to measure and report results in a timely way. The SIF grant's impact evaluation, for instance, planned on three and a half years to completion, reserving the first year of the initiative for sites to build their programs without starting impact measurement. As one AIFCS team member stated, *"As a funder, if you see yourself as an investor, you're probably not always going to get a return on investment if you're funding things that are new, innovative, out of the box. [For these type of projects, you] just really make sure you're concentrating on learning."*

A shared culture of learning unites the partners.

Every organization in the partnership embraces learning, which was a common asset they brought to the table. The funder learning collaborative also supports a learning agenda, rather than focusing on compliance. Setting learning expectations and norms (such as being honest, taking risks, and learning from experience) upfront was critical. Particularly with grantees, promoting a culture of learning helped encourage risk-taking and learning from risks. Often, evaluators urged AIFCS and others to use evaluation data primarily for learning instead of accountability. Equal Measure offered, *"Our stance on not sharing individual data through some of the reporting mechanisms helped reframe the evaluation... It's not that they weren't interested in learning, but we helped elevate learning at the portfolio level over accountability at the site level."*

Learning Notes

- **Build trust and shared values to promote success.** In most cases, the central partners in this initiative entered with existing relationships and experience working together, which provided an initial foundation of trust and facilitates open communication. Further, all of the partners embrace what AIFCS describes as a *"deep commitment to self-reflection, learning and improvement."* Partners discuss having shared values that propel them to work through difficult issues to achieve their goals. At the same time, there are moments in which shifting roles and expectations require people to re-negotiate relationships and re-affirm shared values.
- **Make time to bring all partners together to clarify and revisit roles.** When working in the context of such a complex structure where partners hold overlapping roles, it may be necessary to bring partners together more than once to review and clarify roles. This is particularly true when new partners are brought on board and/or when new funding requires existing partners to take on new roles.
- **Be mindful of the influence of money on relationships and partnership effectiveness.** Tensions can emerge with regard to determining how to allocate limited dollars across multiple partners with diverse roles and expertise. Relationships can also become strained when initiatives culminate and prepare for transition. Finding ways to have honest conversations about what is at stake for each organization, and the principles that guide each organization's behavior, can be helpful for navigating such tensions.
- **Assume good intentions and be flexible.** Complex initiatives with many moving parts can be frustrating as well as exciting. Each partner has its own agenda and set of priorities, in addition to partnering with others. Assuming good intentions and staying flexible about how to implement a plan, while accommodating that of other partners, is key.

IV. POSITIONING PARTNERSHIPS FOR SUCCESS: SEVEN CRITICAL QUESTIONS

When embarking on initiatives involving a triad of partners—funders, intermediaries, and evaluators—you must be strategic and intentional in positioning partnerships for success.

QUESTION FOR EXPLORATION:

What questions should funders ask themselves when weaving together partners to position them for success?

As the case studies make clear, weaving together initiative partners is no small task. It is an endeavor that should be approached carefully and thoughtfully, and informed by the insights and lessons of others. Funders can use the following questions to help navigate key choices in designing these partnerships and positioning them for success.

When funders come together with intermediaries and evaluators, the whole can be greater than the sum of its parts. By minding common tensions and sharing knowledge about what it takes to make these partnerships work in practice, we can achieve systems changes leading to better results for communities.

Topic	Questions	Action Steps
<i>Value Proposition</i>	What is the value proposition for bringing key partners together?	<ul style="list-style-type: none"> • Articulate the individual value each partner brings and collectively what will result. • Communicate expectations to partners in ways that validate the strengths and assets of each partner. • Facilitate conversations with partners about how they can support one another's work.
<i>Structure</i>	How will resources flow from the funder to the intermediary, evaluator, and grantees?	<ul style="list-style-type: none"> • Review different options for configuring resource flow. • Analyze power dynamics associated with each configuration. • Choose the configuration that positions key actors, including the funder, to have the influence needed to drive change. • Consider how to manage potentially undesirable implications of your choice.
<i>Roles</i>	What roles will different partners play, and how will those roles be clarified over time?	<ul style="list-style-type: none"> • Identify key roles and responsibilities of each partner. • Flag areas of potential overlap/synergy. • Review and clarify roles early in the process. • Revisit this plan at regular intervals or key transition periods. • Be open to evolving roles over time as the work and relationships mature.
<i>Communication</i>	Who will communicate, how often, and when?	<ul style="list-style-type: none"> • Work with partners to develop a communication plan for coordinating and managing the work. • Be clear about the purpose of different touchpoints and who is responsible for meeting agendas, documenting, and scheduling. • Revisit the plan to see what is working and what might need to change.
<i>Evaluation</i>	What should be the role of evaluation in the initiative?	<ul style="list-style-type: none"> • Consider the role of evaluation, and the extent to which it supports learning over accountability. • Be clear about the purpose of evaluation. • Emphasize evaluation as a support to the work, rather than a judge. • Build buy-in within the partnership for learning-oriented approaches.
<i>Funder Role</i>	What is the role of the funder?	<ul style="list-style-type: none"> • Articulate hypotheses about what role the funder can best play to support this work. • Test these hypotheses with stakeholders. • Be mindful of power dynamics inherent in funders' roles. • Revisit assumptions and be prepared to adjust roles and hypotheses as the work unfolds.
<i>Trust</i>	What steps can we take to build trust?	<ul style="list-style-type: none"> • Carve out time for partners to meet in person over sustained periods of time. • Build in ice breakers and informal time for socialization. • Monitor and manage how power dynamics may play out in the work. • Look for opportunities to model trust, humility, open communication, and acceptance.
<i>Flexibility</i>	How flexible are we willing to be?	<ul style="list-style-type: none"> • Consider the boundaries of the funder's flexibility about outcomes, relationships, influence, or attribution; what will you hold tight and where can you be looser? • Be clear with partners about boundaries and revisit them as necessary.

Case Study Interviewees

Case #1: LINKED LEARNING REGIONAL HUBS OF EXCELLENCE

- » Elizabeth González, Portfolio Director, The James Irvine Foundation
- » Christina Garcia, Founder, Christina Garcia Consulting (former Senior Program Officer, The James Irvine Foundation)
- » Joel Vargas, Vice President, Jobs for the Future
- » Marty Alvarado, Senior Director, Jobs for the Future
- » Meg Long, President, Equal Measure
- » Kimberly Braxton, Senior Consultant, Equal Measure

Case #2: CONSUMER VOICES FOR COVERAGE

- » Lori Grubstein, Program Officer, Robert Wood Johnson Foundation
- » Susan T. Sherry, Deputy Director, Community Catalyst
- » Reena Singh, Chief Program Officer, Community Catalyst
- » Jewlya Lynn, Founder, PolicySolve (former CEO, Spark Policy Institute)

Case #3: OPPORTUNITY YOUTH INCENTIVE FUND

- » Steve Patrick, Vice President and Executive Director, Aspen Institute Forum for Community Solutions
- » Monique Miles, OYF Director, Aspen Institute Forum for Community Solutions
- » Yelena Nemoy, OYF Senior Program Manager, Aspen Institute Forum for Community Solutions
- » Lili Allen, Associate Vice President, Jobs for the Future
- » Terry Grobe, Director of Youth Pathways, Jobs for the Future
- » Cheryl Almeida, Research Director, Jobs for the Future
- » Jennifer James, Senior Vice President, Harder+Company Community Research
- » Justin Piff, Senior Director, Equal Measure
- » Kimberly Braxton, Senior Consultant, Equal Measure
- » Theresa Anderson, Research Associate, Urban Institute

ACKNOWLEDGEMENTS

Engage R+D, Equal Measure, and Harder+Company Community Research would like to thank The James Irvine Foundation for its generous support of this report. We also appreciate the honesty and candor with which all the interviewees spoke to us during the interview phase and the thoughtfulness they demonstrated with their feedback on the draft report.

