K4D | Knowledge, evidence and learning for development

Learning with Small and Medium sized CSOs

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Question

How can big donors work best with small and medium sized Civil Society Organisations (CSOs) in the Global South to build their capacity to achieve development outcomes?

Contents

1. Summary

Small and medium sized Civil Society Organisations (CSOs) are often in a privileged position to participate in a type of community development that is based on relationships and in tune with community needs. Yet, small and medium sized CSOs in the Global South have traditionally been excluded from access to international resources, which are more likely to be captured by Northern or large, highly professionalised Southern CSOs. This is a missed opportunity: big donors could learn much from having a closer partnership with smaller local partners. Big donors interested in promoting the organisational capacity of such organisations might consider flexible, core funding, and the promotion of mutual learning.

For decades, development efforts have leveraged CSOs as partners. In fact, critics say that many CSOs experience a dependency on the development industry, and that CSOs' agency and agility to explore grassroots innovation and development alternatives is limited when donors work with CSOs as contract providers for service delivery, allowing for little flexibility. Yet, the literature tends to speak of CSOs in general, without a sensitivity towards the enormous diversity characterising the ecosystem of civil society. The term CSOs often refers to 'large CSOs'; donors have little comprehension of the needs and experiences of small and medium sized CSOs.

Brehm (2004) defines an autonomous organisation as one free to define strategic directions without external pressure and able to maintain horizontal relationships with other actors. Without direct access to resources, small and medium sized CSOs risk becoming subcontractors of larger ones, caught in a development chain in which they lose the autonomy needed to think creatively about addressing community challenges.

The literature points to several challenges that characterise the way resources are made available to CSOs:

- Resources available to CSOs do not invest in building the capacity of the organisation; they instead focus on short-term, specific projects which expect fixed results (Oram & Doane, 2017);
- Training efforts tend to focus on preparing CSOs to comply with Northern donors' standards, while there is little support to promote local knowledge and culture;
- Access to resources for CSOs is shrinking, especially in those countries that are now regarded as 'middle income' countries and yet continue to experience important challenges such as growing inequality;
- Resource scarcity means that CSOs find themselves competing, rather than collaborating (Browne, 2015);
- Reporting requirements can be tedious, time-consuming, and focused on narrow outputs.

These challenges are magnified for small and medium sized CSOs in the Global South considering that:

- They are less likely to have the resources to invest in developing the technical skills required to access and manage resources;
- Core funding is rare and provided to larger and more professionalised organisations in urban areas;

- In the last few years, civil society has been under attack and civic space is shrinking in many countries around the world (CIVICUS, 2016).

To improve the ability of smaller CSOs to access resources, as the literature suggests, donors might consider:

- Building a culture of open communication and mutual trust with CSOs;
- Differentiating funding calls to invite the application of smaller or newer CSOs;
- Providing multiyear core funding;
- Ensuring flexible budget lines.

This report reviews a selection of relevant literature, summarising some of the key takeaways. Academic literature on civil society tends to focus on larger and Northern CSOs, while small and medium sized Southern CSOs have received less attention. This report is based mostly on grey literature including white papers (BOND, 2015; ILPI, 2014) and donors' independent evaluations of civil society programs (Coventry, Watson, & Blight 2015; Esplen, 2016). I also make reference to literature reviews on Southern civil society (Brown, 2015; Williams, 2018; Schulpen & Habraken, 2013). Part 2 provides an overview of the experience of small and medium sized CSOs in development processes. Part 3 provides a summary of the main funding mechanisms discussing how accessible they are to small and medium sized CSOs. Part 4 discusses a series of best practices that emerge in the literature to encourage small and medium sized CSOs to resource themselves and develop autonomy.

2. Small and medium sized CSOs in the development chain

The role of Southern CSOs in contributing to development and social transformation is regularly emphasised in the literature. Southern CSOs are regarded as partners able to understand local contexts, reach more deeply into the fabric of society, and work closely with the people that development cooperation is ultimately trying to reach (Schulpen & Habraken, 2013). The need for an independent civil society is referred to in academic literature, but also in the rhetoric of international cooperation, as being an essential component to a democratic society in which different voices can be represented and public and private powers counterbalanced. For example, these points were stressed in the Busan Declaration (2011), in which governments committed themselves to enabling CSOs as independent development actors (OECD, 2013).

Meanwhile, CSOs are being regarded as partners to implement donors' agendas (often defined within the context of international cooperation networks that are disjointed from local contexts). Coventry, Watson, and Blight, (2015) report that more than half of Development Assistance Committee (DAC) members declared their first reason for supporting CSOs as being that of implementing aid programmes linked to service delivery.

In short, the literature points to a tension between the rhetoric of CSOs as independent actors that contribute to local solutions and CSOs as implementing partners of donors' development cooperation agendas. It seems that donors are yet to find a healthy balance between enabling CSOs autonomy and working with them to achieve internationally defined agendas such as the Sustainable Development Goals (SDGs) (Nilsson et al. 2013). The risks and potential consequences of this lack of alignment should be considered and reflected upon when thinking about how to support small and medium sized Southern CSOs.

Small and medium sized Southern CSOs might be understood considering their interaction with the power imbalances of the development industry. To begin with, the literature stresses that an exceptionally low percentage of funding allocated to development efforts actually reaches developing countries. The majority of ODA funding is channelled through Northern CSO partners. A study by the Foundation Centre (2018) found that of all funding allocated for Latin America, 62% was awarded to organisations located outside of the region. A study by the OECD reports that in 2014, CSOs in developing countries managed directly only 8% of gender focused aid allocated to civil society (Esplen, 2016).

Some literature is questioning or asking for more scrutiny around the role of Northern CSOs as intermediary organisations and stressing for the importance of empowering local actors directly (Nillson et al. 2013). This trend towards disintermediation however is still in early phases, and its implications are not fully understood (Williams, 2018). For example, Northern CSOs might choose to relocate to the South to respond to this trend with the risk of crowding out local civil society space.

Browne (2015) reports that donors give core funding when they trust CSOs - this tends to happen to well-established and large organisations, based in urban areas. The small percentages of funds that reach CSOs in developing countries tend to be centralised in a few large, professionalised CSOs. For example, the independent review of SIDA's work with civil society concludes that CSOs are mainly used instrumentally to reach predefined strategic objectives (Nilsson et al., 2013). The evaluation found that to reduce risks, it is easier to work with organisations that are well known, have the strongest record of working with big donors, and are highly professionalised. In short, it is easier to work with the usual suspects. The review found that criteria such as 'reputation', 'personal relationships' and 'previous good record' are preferred; hence, those organisations that have traditionally worked with SIDA are more likely to be selected while it is hard for new actors to cultivate a relationship. The evaluation found that these patterns were associated to the lack of administrative resources in field offices. It was more efficient to allocate large funding to fewer organisations, while small and medium sized CSOs were disadvantaged for requiring more individualised follow up and attention (Nilsson et al., 2013).

The risk for small and medium sized CSOs is to become sub-sub-contractors of the international cooperation agenda, losing their agency to frame their solutions to local issues (Schulpen & Habraken, 2013). This is also because very little funding is provided as unrestricted or core funding, and instead donors prefer funding specific projects reflecting donors' priorities. Esplen (2016) reports that "gender focused organisations are being incentivised to act primarily as implementing agencies rather than to pursue their own agendas" (p.11). Such a relationship to donors might put in to question the ability for CSOs to be accountable to their constituencies and articulate their own longer-term vision in an autonomous way.

In order to act as independent and autonomous development actors, CSOs would benefit from core funding and there have been several reports recommending for this to be a more efficient funding mechanism (Oram & Doane, 2017; Browne, 2015). However, Nilsson et al. (2013) report that core funding is increasing, but mainly allocated to large and highly professionalised CSOs. Resourcing smaller and medium sized CSOs feels cost intensive to donors. Under pressure to keep transaction costs low, it is easier to provide large amounts to fewer CSOs (Esplen, 2016).

In order to mitigate these structural barriers that smaller and medium sized CSOs face, capacity building will have a major role. Grant-making might include training on skills that would allow

CSOs to comply with donors' requirements and increase their likelihood to be eligible for more funding. According to a study by the Foundation Centre, the top five skills that funders are more likely to support include leadership/staffing, strategic planning, financial management, governance, and fundraising (Pond, 2015). While such trainings are welcomed, Southern CSOs find themselves with multiple priorities. To be more likely to receive funding they need training to improve specific organisational capacities such as infrastructure, operations, financial health, and programmes (Pond, 2015). Meanwhile, they also need to find their own voice.

BOND (2015) stresses that the space to reflect, learn and adapt can become squeezed and that funding practices have the ability to "hinder or encourage co-creation, adaptation and transformation" (p. 6). Capacity building tends to be skewed towards making CSOs more appealing to big donors - meanwhile, there is little funding available for organisations to invest in their own organisational growth and learning priorities, which may not be valued by donors. An independent evaluation of DFID's Civil Society Challenge Fund (CSCF) reported that grant holders, UK CSOs who received DFID funding, trained implementing Southern partners to ensure they would have the competencies to fulfil monitoring and reporting guidance (Coventry et al. 2015). It also found that the programme approach to learning tended to be very technical, with little opportunity to facilitate learning that could improve the quality of projects. The evaluation emphasised the importance to go from an 'extractive' approach to learning to a more collaborative approach. For example, small and medium sized CSOs might experiment with methodological innovation, but it is rare to have a Northern donor contract a Southern CSO to receive training.

Despite these complexities, the literature stresses that support from big donors to small and medium sized Southern CSOs might be particularly relevant considering the alarming crackdown on civic space around the world (Oram & Doane, 2017; CIVICUS, 2016). Governments are repressing CSOs by making bureaucracy inaccessible and limiting freedom of assembly. Moreover, government might make it hard for CSOs, especially the more politically engaged ones, to receive funds from foreign donors. Oram and Doane (2017) suggested that in such contexts, it becomes even more urgent to ensure coordinated efforts to promote an enabling environment for civil society to carry out development and humanitarian work.

The next section discusses how small and medium sized Southern CSOs engage with different funding mechanisms.

3. Which funding mechanisms support small and medium CSOs?

Multi-donor pooled funding

After the Paris Declaration in 2005, governments agreed to harmonise their development efforts (that had until then been piece meal and scattered) by creating multi-donor pooled funding. This strategy has lowered donors' transaction costs. However, several reports suggest that this funding mechanism creates access barriers for small and medium sized CSOs (Browne, 2015).

The OECD (2013) reported that pooled funding promotes monopolies enjoyed by larger CSOs. Smaller CSOs are less likely to be able to comply with the requirements to access pooled funding - the risk is for them to become implementing partners of bigger CSOs, compromising their autonomy.

Moreover, it has been found that this concentration of resources might reduce the diversity of funding sources and incentivise those organisations that better align to donors' priorities (OECD, 2013). Because of the weaker institutional capacity, national and local small and medium sized CSOs risk entering in an unfair competition with international non-governmental organisations (INGOs); the inability to access funding further limits their opportunities to increase institutional capacity.

Partnerships with Northern partners

Using Northern CSOs as an intermediary is a popular choice for donors. There are mixed reviews of this strategy. Nillson et al. (2013) found that Northern CSOs are more likely to partner with CSOs that are similar to them in terms of themes, culture and priorities. Smaller but more grassroots organisations might be excluded. Esplen (2016) stresses that it is important to choose the right intermediaries. For example, in unstable and fragile contexts, INGOs might seem like the most feasible partners as long as they are on good terms with state authorities.

An independent evaluation of a DFID programme found that Southern partners within it appreciated the relationship with UK charities if the latter added value to the programmes (Coventry et al., 2015). UK partners supported Southern CSOs with accessing funds, project design, project oversight, and, to a lesser extent, training. The evaluation found that the UK partners, that were small and medium sized CSOs, had trouble supporting their Southern partners because of a lack of capacity – the UK partners would have required further capacity development to better accompany their Southern partners.

According to a review by Esplen (2016) on programmes aimed at women, donors should consider monitoring the relationship between Northern grantees and Southern sub-grantees. Reporting on some good practices, the study highlights the European Union's practice to evaluate the quality of the partnership with local sub-grantees. Both Norad and The French Development Agency contract national organisations but monitor how the Northern CSOs transfer funds to local partners and how much (Esplen, 2016).

Project and programme funding

Project and programme funding helps donors control how money gets spent. However, this type of funding mechanism has come under great scrutiny in the literature. Much of the evidence suggests that donor reporting and accountability requirements take up a lot of CSO time and divert attention away from core activities (Browne, 2015).

CSOs consume much energy in grant management especially when they find themselves managing multiple donor relationships with different types of requirements. The energy that CSOs invest in complex bureaucratic processes can distract organisations from other competing priorities. CSOs can become more concerned with upward accountability, and less responsive to local needs. As Oram and Doane (2017) note, "When placed upon a project treadmill, many local CSOs can't be agile and pivot rapidly when their space comes under attack" (p.12).

Funding for narrow projects and programmes has been associated with an environment that promotes competition between CSOs, increasing fragmented efforts in an unpredictable funding environment. CSOs competing for the same funding are more likely to be sceptical of cooperation (Browne, 2015).

Payment by results

Donors' preoccupation with maximising their impact and proving Value for Money is at the root of the emergence of Payment by Results (PBR), a financial aid mechanism that provides payment on contingency of verification of results (Boyle, 2011).

However, this mechanism has been criticised for giving visibility only to results that can be measured while, as Boyle (2011) phrases, "not everything can be measured: PBR fails to measure precisely what is most important" (p. 628-630).

The mechanism has also been criticised for discouraging the creation of real partnerships. Donors outsource the risk of failure to contracted organisations and avoid the dialogue around failure and disappointment (Boyle, 2011). This type of dialogue should be recognised and valued as part of a more equal partnership. The mechanism deters results that are not predictable such as innovation, advocacy, movement building, and learning from failure (Browne, 2015; BOND, 2015). A type of partnership based on trust seems to be precisely what small and medium sized CSOs need to rebalance power dynamics.

Core funding

Core funding provides resources that are not restricted and allow CSOs to invest in organisational strengthening (Browne, 2015). More flexibility allows CSOs to invest in operational and administrative costs, which can expand the capacity of CSOs to implement programmes (Oram & Doane, 2017; Esplen, 2016).

Small and medium sized CSOs regularly emphasise the value for core funding in order to develop their support base, invest in movement-building, and research.

Core funding to Palestinian and Israeli human rights organisations

(Karlstedt, Abdulsalam, Ben-Natan, & Rizik, 2015)

In 2015, the Swedish Consulate General in Jerusalem commissioned an evaluation of the funding provided to Palestinian and Israeli human rights organisations through a joint donor mechanism composed of Sweden, Denmark, Switzerland and the Netherlands. The evaluation assessed the effectiveness of a pooled funding established in 2004 that was aimed at harmonising funders' efforts. Core funding was provided to 24 organisations and complemented with capacity building and facilitation of joint policy dialogue.

The study found that core funding was important and effective, and allowed organisations to stay flexible and relevant. The study found that the multi-year predictable funding allowed organisations to carry out human rights work that by nature matures when carried out over the long term. The core funding was useful to allow organisations to respond with more agility to emergencies; with unrestricted budgets, organisations were able to take immediate decisions when needed. Job security for local staff was also ensured through this funding. Finally, collaboration between grantee organisations increased as organisations were released from the pressure to compete for funding.

Organisational capacity building was a strong component of the core funding - 10% of the core funds was earmarked for it. It focuses on institutional capacity, clear governance, and adequate internal control systems. This was deemed important to fortify the trust between donor and grantee and ensure there was capacity to manage the core funding. Training was also provided to facilitate joint policy dialogue with donors, and to prepare CSOs on emergency responsiveness. Training initiatives were also utilised as networking opportunities and they were associated with the solidifying of joint advocacy efforts.

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4. Working and learning with small and medium sized organisations

This section discusses specific best practices that emerge from the literature around how donors can strengthen the capacity of small and medium CSOs. Section 4.1 summarises recommendations around providing funding mechanisms that can be better accessible to small and medium CSOs; section 4.2 will focus on lessons learned around capacity building.

4.1 Establishing capacity through funding mechanisms

Diversify calls:

The literature stresses that in order to be accessible to different types of CSOs, donors might consider diversifying funding sources (BOND, 2015; Oram & Doane, 2017). Grant windows can be tailored to different types of organisations, keeping in mind small and new organisations. In particular, different funding windows should account for the different levels of administrative

capacity that small and medium sized CSOs might have and should be designed so as to be approachable for grassroots actors.

Oram and Doane (2017) argued that all funding calls should be open to competition; however, donors should avoid criteria that prize those organisations that can jump administrative hoops therefore dissuading smaller and newer CSOs.

Creating special funding windows can also be a way to prevent INGOs competing against smaller organisations for the same pot. Donors need to be intentional about creating such windows. For example, Esplen (2016) highlights a joint fund, initiated by the Dutch Embassy in 2005 in Burkina Faso, aimed at providing access to funding for local women's rights organisations. Another example is the Fiji Women's fund set up by the Australian Department for Foreign Affairs and Trade (DFAT). [1] It was designed to provide small and medium sized grants to local women's organisations and offered three different types of funding: a multiyear one with contribution to core funding; a one-year funding with contribution to core funding; and smaller grants for projects that are less than one year.

Working with re-granting intermediaries:

One way that big donors can encourage more flexible granting schemes is by outsourcing to re-granting agencies that specialise in managing small grants (Nillson et al. 2013). This was the case with the Dutch MDG3 Fund to support women collective action. By working with intermediaries, the fund reached grassroots organisations and was able to provide core and flexible funding to scale up organisational work (Esplen, 2016).

Improve capacity to retain staff:

Because of unpredictability of funding streams, many small and medium sized CSOs tend to have high staff turnover (ILPI, 2014). Staff turnover means that organisations can have fresh streams of ideas (EUROSIS, 2016); yet, it also implies a difficulty with retaining knowledge, preserving institutional memory, and sustaining organisational learning (Nillson et al. 2013).

Moreover, competition between CSOs means that there can be unequal competition in terms of retaining staff especially given that smaller CSOs are considered talent pools for more established ones (ILPI, 2014). This tension over staff retention can amplify with the trend towards decentralisations of global CSOs to the Global South (Williams, 2018).

Ensure Flexibility:

Access to resources for small and medium sized Southern CSOs need to ensure flexibility (Pond, 2015).

Flexibility here should not be understood in a technical sense; it is instead an attitude that can develop transversally across communication and reporting requirements (Shipman, 2017). It should allow CSOs to establish a more open and transparent relationship with donors. Such flexibility could help to address some of the unequal power dynamics that might encourage CSOs to be less accountable to realities on the ground.

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[1] Fiji Women's fund: https://fijiwomensfund.org/

This is very important in unstable political environments. For example, Oram and Doane (2017) discussed how some donors allow projects to freeze when organisations are experiencing emergencies or threats. For CSOs in unstable environments, donors can facilitate the work by providing flexibility to reorient resources across budget lines.

Such flexibility could manifest in different forms such as:

- Emergency support such as Rapid Response Funding (BOND, 2015);
- Providing pro bono services (Oram & Doane, 2017);
- Providing budget lines to develop networking and alliance-building (OECD, 2013);
- Include contingency funds in project funding (Coventry et al. 2015).

Rethinking capacity building

Small and medium sized CSOs will need higher investments in learning and organisational strengthening. According to BOND (2015), "all funding calls should incorporate a learning element, with specific budget lines allocated to the production of useful evidence and meaningful dissemination of these results" (p. 12). Meanwhile, funding and capacity building should be coupled; the Foundation Centre found that providing training without capacity to implement changes is not that helpful (Pond, 2015, p. 9).

Focus on relationships:

As Pond (2015) highlights, "Relationships are best built when grantees feel empowered to drive a conversation …[and] when the funder doesn't react with stress or angst if grantees share a challenge or shortcoming" (p.13).

The Foundation Centre found that successful grantee capacity building depends on an open and honest relationship between donors and grantees (Pond, 2015).

Such a relationship needs to be nourished over time. This could be done by ensuring clear communication channels and appointing people in charge of developing relationships with grantees. Coventry et al. (2015) explained that the relationship with grantees improved after the designation of thematic leads who understood project context and provided continued correspondence.

To ensure a fruitful relationship, Fund Managers should facilitate a two-way dialogue between grantees and donors. Coventry et al. (2015) also found that visiting each CSO at least once in the life time of a project could contribute to relationship building.

Context and ownership:

Allocating capacity-building budget lines within funding calls is a good practice. However, donors can do more than just preparing Southern CSOs to engage with donors. As Houghton (2016) explained:

"Older and narrower traditions of NGO capacity building must give way to longer-term institutional strengthening, enhancing financial sustainability, cross-sector alliance building and how to generate a genuine supporter base that can be activated in roles other than simply raising money. Rather than parachuting in what has worked in London, New York or Paris, these

constituencies must be rooted in local cultures of giving and action, alternative education, active citizenship and solidarity*."*

Beyond technical trainings, big donors can invest in creating spaces for CSOs to develop their vision, resilience, and leadership. USAID has found that this type of soft empowerment bolsters organisational effectiveness (BOND, 2015).

Emerging approaches to capacity building for small and medium sized CSOs

Peer-based learning opportunities

The Foundation Centre (Pond, 2015) reports that they have found grantees make the most of learning in the context of peer groups where they can shape the agenda around sensitive topics such as leadership transitions, and movement building. Peer-based programmes can be requested by grantees, designed by the funder, or co-designed. The efforts to connect grantees with one another can be very impactful to facilitate mutual learning and set the base for coalition building. Retreats can provide powerful opportunities to invite grantees to form a network.

Donors can also team up and pool funding around specific training programmes. This type of partnership can generate venues for donors to exchange experiences and best practices.

Mutual capacity building

Shipman (2017) defined mutual capacity development as "a process of strengthening skills, knowledge and network contacts in which all actors, regardless of their country of origin, participate as equal partners" (p. 5). The term *mutual* is intended as a descriptive term of the type of learning that is generated in the relationship and as a process that is based on trust and respect.

This approach starts from the recognition that there are power imbalances that make it so that Northern knowledge is regarded as more valuable. To address such power imbalances there needs to be a recognition that communities and their local CSOs and movements are legitimate experts, that they understand best their experience and problems, and that they are able to design solutions and speak for themselves.

Based on this understanding, mutual capacity building seeks to:

- Engage CSOs as equal partners;
- Value different types of knowledge;
- Promote the articulation of a collective voice;
- Encourage learning together and collaboration (including jointly designed trainings, research, advocacy and campaigning).

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