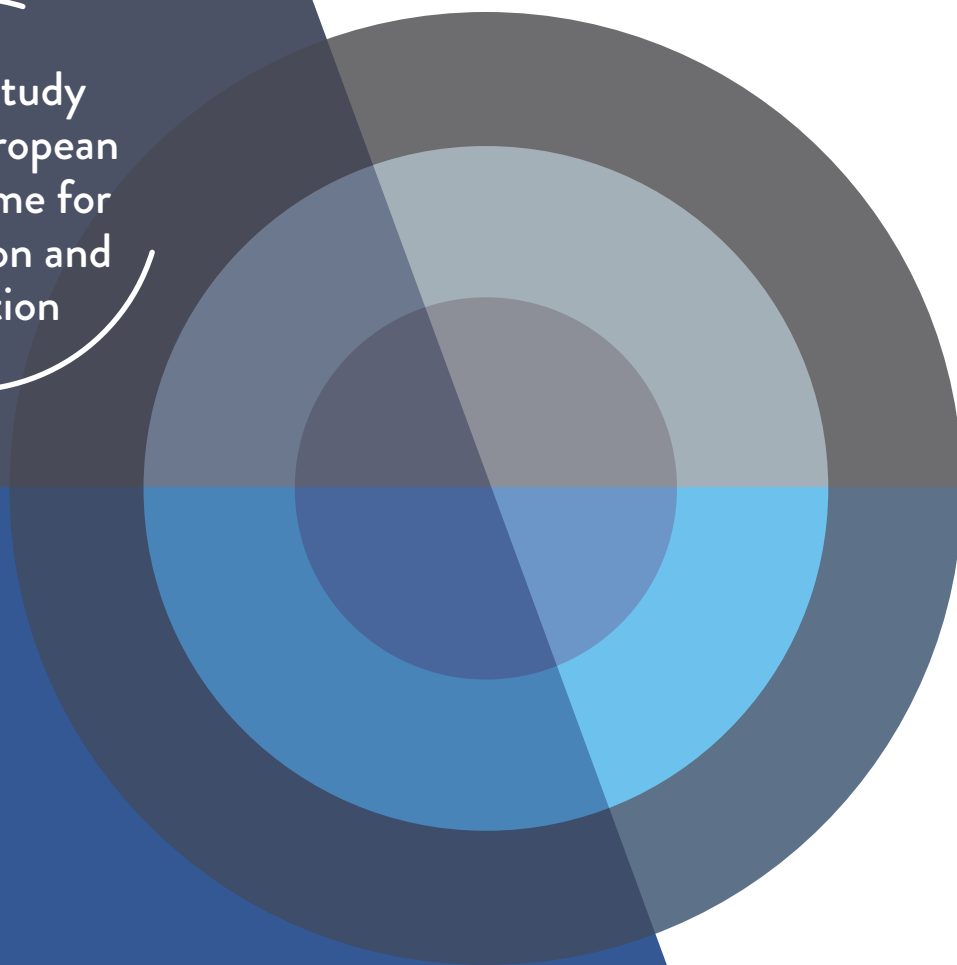
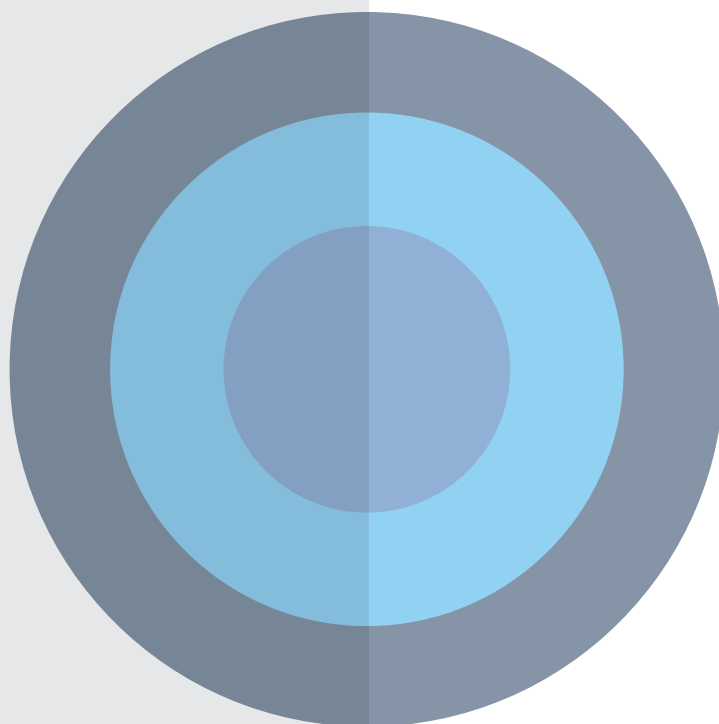


POOLING FUNDS, POOLING STRENGTHS

A case study
of the European
Programme for
Integration and
Migration





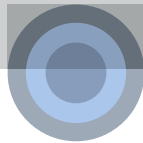
Authored by Lisa Marie Salley (Kumquat Consult)
for the Network of European Foundations.

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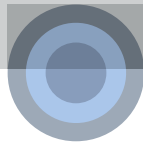
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Methodology

To effectively and independently gather data for this case study, expert consultants carried out 16 interviews with member foundations, grantees, evaluators and Secretariat staff. They also thoroughly reviewed internal and public EPIM documents.

1. EXECUTIVE SUMMARY

The European Programme for Integration and Migration (EPIM) was founded 12 years ago by members of the Network of European Foundations (NEF). It has since developed into a strong and agile funding structure made up of 25 foundations. In addition to giving out EUR 15m to 150 organisations, EPIM has become a hub of knowledge and expertise, uniquely contributing to the field of integration and migration in Europe.



In 2005, NEF members felt foundations had to start collaborating at the European level: migration policy was becoming an EU competency, while funding for CSOs remained national. Members felt that connecting actors across the local, national, regional and European levels would lead to a larger and more strategic impact.

EPIM created abundant added value for its members and grantees. Through an approach that is both efficient and flexible, EPIM distributes grants in a way that one foundation alone would find difficult.

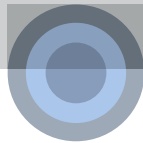
EPIM also provides a protective umbrella under which foundations describe themselves as braver, finding it easier to take risks as they work to find solutions together. As the largest and most diverse collaboration on this topic, members and grantees alike learn from each other's expertise and viewpoints – benefiting their work both in and beyond the programme.

This case study identifies what made EPIM work, and what lessons it offers for others seeking to impact their own field. It shows the importance of a strong governance model and central coordination in any collaboration. It highlights the benefits of linkages between actors in the field and policy-makers, creating a space for dialogue between them. It also reflects the need for excellent connections to the field, building trust with all actors to truly understand realities on the ground. Finally, it also underlines the unique benefits of going beyond grant-making alone, of developing a flexible approach, and of constantly learning from grantees and the field.

Readers will see how collaboration and co-creation have delivered unique results for foundations, grantees, and the field at large. They will, hopefully, be inspired to set up similar collaboratives to impact their own field.

2. FOREWORD

NEF was created 40 years ago to enhance collaboration among foundations and other partners. EPIM incarnates this very mission.



What we like about EPIM is that funders practice what they ask of their grantees: collaborating to increase impact in the field. This is no easy exercise: it certainly requires commitment and a long-term perspective. But it does pay off, and mightily: return on investment can be measured at all levels, as this case study clearly shows.

Since the early 2000s, the European Union has been given increasing decision-making power on migration issues. Field actors, including our member foundations and their grantees, have had to integrate this larger framework into their work on migration to remain relevant. EPIM was born out of this mighty opportunity and challenge, and has since developed and adjusted to address a context gaining urgency and attention daily in Europe and worldwide. The key ingredient to EPIM's success is NEF's mantra to learn by doing. It enabled the programme and all those involved to constantly learn, adapt and stay relevant in a rapidly-developing field. NEF itself also benefited by institutionalising and professionalising its toolbox and activities as a re-granter.

We hope this case study demonstrates the emergence of a joint and promising philanthropic agenda at the European level. And perhaps most importantly, we hope that showcasing these 13 years of learning and development will inspire our philanthropic community to start more pooled funds.

Peggy Säiller
Executive Director
Network of European
Foundations

Stefan Schäfers
Chair
European Programme
for Integration and Migration

ABOUT NEF

The Network of European Foundations (NEF)

NEF is an association of leading European foundations dedicated to strengthening philanthropic cooperation.

We fund and support civil society in its work for social inclusion, democracy and international development – at the European and global level.

We work in partnership with foundations, non-profit organisations, government institutions, and more.

We aim at better and more strategic collaboration between foundations, and our mission is to realise European solidarity through philanthropy for social inclusion, international development and democracy.

The “Pooling funds, pulling strengths” series

To celebrate NEF’s 40th anniversary, this case study series will illustrate European philanthropies at their best: joining forces to grow their impact and deliver unique results. Each case study will show how collaborations between foundations were developed and incubated with NEF’s support. By reading about the design, approach, advantages and challenges of each collaborative, foundations will discover how they too can benefit from working more closely together.



Missing Children Europe © Jeff Malo

ABOUT EPIM

EPIM – the European Programme for Integration and Migration – was founded in 2005 by NEF members who believed their collective creativity and pooled resources could have a much greater impact on migration and integration locally, nationally and in Europe.

Now in its thirteenth year, EPIM has distributed more than EUR 15m in project grants or capacity development support for over 150 organisations. Grants range from short-term learning grants and pilot projects to long-term support for core activities.

EPIM benefits from a diverse and broad membership, ranging from newly-established family foundations to century-old trusts, to regional or national banking foundations, to profit-making foundations.

EPIM built a large network of contacts across Europe; it includes grassroots activists, think-tanks, academia and independent experts. EPIM harnesses this collective wisdom to build its strategy, ensuring a coherent approach that reflects reality.

The following foundations are currently involved in EPIM's work: Adessium Foundation, Aga Khan Foundation, Barrow Cadbury Trust, Bertelsmann Foundation, Bodos-saki Foundation, Calouste Gulbenkian Foundation, Charles Stewart Mott Foundation, Compagnia di San Paolo, Fondation Abbé Pierre, Fondation de France, Fondazione Cariplo, Fondazione Cassa di Risparmio di Padova e Rovigo, Fondazione Con il Sud, Fondazione CRC, Fondazione CRT, Fondazione Enel Cuore, John S. Latsis Foundation, Joseph Rowntree Charitable Trust, King Baudouin Foundation, la Caixa Foundation, Monte dei Paschi di Siena, Oak Foundation, Open Society Foundations, Robert Bosch Foundation, and Stavros Niarchos Foundation.

EPIM's goals

EPIM supports and strengthens civil society organisations (CSOs) working on issues of migration and integration at the European level to:

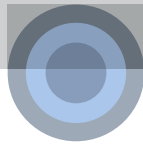
- Uphold and defend the European commitment to universal human rights and social justice, to ensure the dignity of all people in the European Union;
- Promote gender-sensitive, inclusive and pragmatic approaches to European and national policies on migration and integration;
- Influence EU policies and their national implementation in areas defined in EPIM's sub-funds.

Strengthening advocacy capacities of these organisations is central to its support model. EPIM does this by:

- Enabling national CSOs to bring their knowledge and best practices to the EU level;
- Encouraging national CSOs to partner across the EU in order to build effective coalitions for advocacy and to share experiences;
- Assisting pan European CSOs to take advantage of national experiences to develop European solutions to core challenges.

3. THE GENESIS OF EPIM

Prior to EPIM, almost all European foundations working on migration and integration had a national focus. Yet, the early 2000s saw EU policy-making in this field develop and grow. In 2005, NEF members felt the issue of migration had become a shared concern, and saw potential for better coordination and practice-sharing between them to increase their European impact. Co-founding members were keen to help improve the situation for particularly disadvantaged groups such as undocumented migrants, and saw this as a potential starting point for pan-European collaboration.



WHY WORK ON MIGRATION AND INTEGRATION AT THE EUROPEAN LEVEL?

Put simply, the need for European collaboration became self-evident.

First, in policy. Since the Schengen Area launched in 1995, the European Union has increasingly determined policies on migration. Funders and CSOs looking to impact this policy area must direct some of their efforts to the European level.

Second, in funding patterns. In parallel to these policy developments, civil society logically developed to meet European challenges at the European level – but only had national grant-makers to ask for support. Creating EPIM responded to a desperate need to fund unique European work, multi-level advocacy, and transnational networking.

Third, to connect actors working towards similar goals. European collaboration connects actors in two ways. “Horizontally”, it connects actors from different geographies and contexts, allowing them to increase their understanding, expertise and network. There is great value in an Italian caretaker for children on the move meeting a Greek colleague facing similar issues or having found adaptable solutions. And “vertically”, it connects the local and national to the European, benefitting both. EPIM encourages work between grassroots organisations and European organisations, bringing local expertise to Brussels policy-makers, ultimately helping them create better and more informed policies.

Fostering cooperation between the grassroots and European levels: A priority

EPIM purposefully nurtures productive relationships between grassroots civil society on the one hand, and European-level CSOs and EU institutions on the other hand. Without this essential transmission belt, local actors are kept in the dark as to what happens “in Brussels”, while policy-makers struggle grasping what happens on the ground. EPIM does this by specifically funding projects led by groups of varied organisations working at different levels, or fostering this cooperation through events, workshops, site visits, and other forms of knowledge exchange.

And fourth, to make funders’ work easier. Through EPIM, members pool their resources to do work useful to all – or most – of them. For example, instead of several grant-makers responding to the same funding request from a European CSO, EPIM acts as a contact point. It also helps member foundations understand how European developments may impact their work on migration.

EPIM’S STRUCTURE

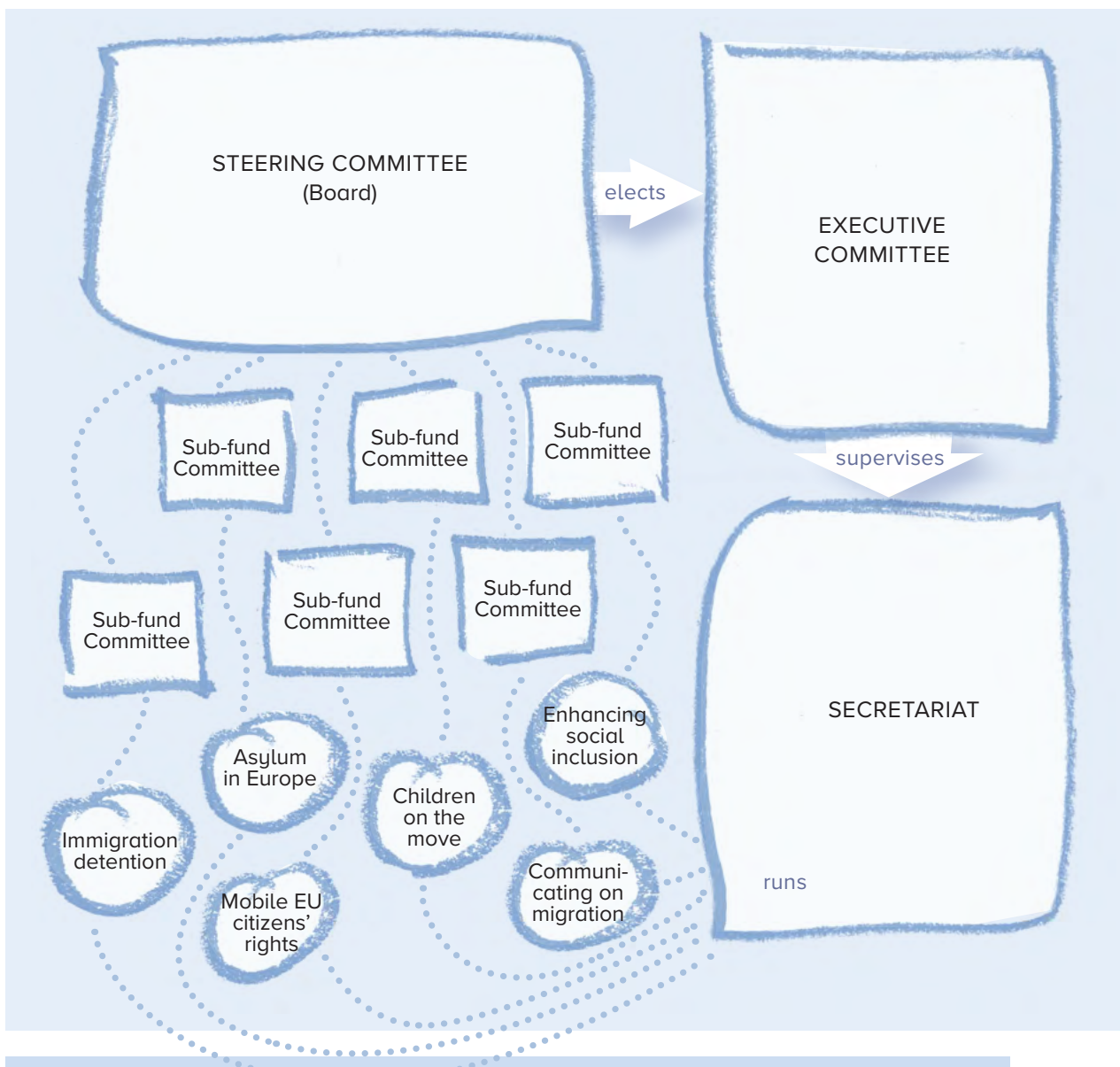
In 12 years, EPIM evolved from a small pilot collaborative to a mature programme of 25 members, supported by its own governance model and a capable Secretariat.

“The perennial problem with collaboratives is that foundations too easily move on to the next shiny thing. There’s a constant churn of individuals, so you need governance arrangements that withstand capriciousness and are suitable in the long term.”

SARA LLEWELLIN, BARROW CADBURY TRUST



Mentor Escalé, Paintings



The Steering Committee is EPIM's board. It is consulted for strategic decisions relating to the overall programme, and receives updates from Sub-Fund Committees. It meets twice a year, and is made up of all Partner members (see below).

The Executive Committee is mandated by the Executive Committee to make decisions on day-to-day matters. It acts as a sounding board to the Secretariat.

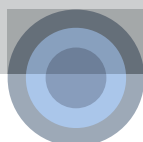
Sub-Fund Committees take decisions specific to their sub-fund on strategy, implementation and grants, within the framework agreed with the Steering Committee. Partner or Associate members join sub-funds aligned with their strategic interest or focus. (See page 14 for a list of EPIM's six sub-funds.)

The Secretariat acts as EPIM's guardian and caretaker. The Secretariat provides intelligence, maintains institutional memory, and plays a substantial role as moderator and adviser to members. It connects grantees, partners and experts, and ensures collaboration is effective at all levels.

Foundations can be Partner or Associate members. Partner members are involved in the overall governance and strategy of EPIM in addition to managing the sub-funds aligned with their interests. Associate members take part in thematic sub-funds, but don't partake in the overall management of EPIM. This structure makes it possible for a large and diverse group of foundations to collaborate to the degree that they wish.

4. THE ADDED VALUE OF COLLABORATING IN A POOLED FUND

European collaboration appears to have created great value for EPIM's members, grantees and partners, making it much more than the sum of its parts.



"We are pulling funds, expertise and networks in the field together, creating a real center of expertise on migration funding in Europe." STEFAN SCHÄFERS, CHAIR OF EPIM

A HUB OFFERING EFFICIENCY AND FLEXIBILITY

To many members, EPIM adds value by efficiently distributing funds, reaching a breadth of grantees in ways that would cost individual foundations extensive resources to replicate. EPIM's centralised and shared intelligence make it possible to fund the field with a bird's eye view. Over time, members have allocated more funds to EPIM. This is partly because of a worsening political context, but also, importantly, because EPIM offers its members a genuine return on investment.

EPIM's flexibility is also spoken of highly. On the one hand, its overall strategic focus on migration and integration catalyses members' efforts in supporting a very large field. On the other hand, sub-funds also allow foundations to direct their investment with surgical precision towards a specific topic or approach, ultimately strengthening the entire field. In short, EPIM helps members support both an entire field and its component parts.

A WIDE UMBRELLA THAT PROTECTS AND ENABLES RISK-TAKING

Several interviewees for this case studies spoke of EPIM as an umbrella, under which members feel protected and freer to take risks. Member foundations reported becoming braver in their funding, and being likelier to take risks than when working alone. The support and trust created by the collaborative gives members the confidence to fund pilot projects and small organisations carrying out innovative and yet untested action. Seeing what their peers do also helps members imagine how their focus area could evolve, geographically and thematically.

A LARGE AND DIVERSE COMMUNITY

EPIM is the largest and most diverse collaborative of its type in Europe. Each member has a different philanthropic experience, and provides expertise across different issues, themes and contexts. This generates rich and powerful collective intelligence. EPIM's workshops, conferences and committee meetings allow members and grantees to share their experiences and learn from one another, exposing them to areas they're not accustomed to that impact one another (e.g. someone working on the detention of asylum-seekers meeting someone working on undocumented migrants, or someone funding border rescue operations in Bulgaria meeting an inclusion policy specialist in Belgium).

Connecting those working on migrants' rights with those working on health

When human rights arguments alone began to run out of steam politically, EPIM supported Médecins du Monde to advocate for asylum-seekers' rights from a health perspective. This alternative approach was enabled by the rich collective intelligence generated through collaborative funding, mobilising actors and arguments across the usual policy "silos".

This diverse knowledge-sharing directly informs EPIM's strategy, and benefits everyone in the community of funders and grantees. Ultimately, connecting these ideas increases policy impact.

A LIVE WIRE BETWEEN LOCAL, NATIONAL, REGIONAL AND EUROPEAN ACTORS

Integration and migration issues are inextricably tied to all four levels. In this increasingly complex web – of powers and responsibilities; causes and consequences –, EPIM connects actors who would otherwise hardly know about one another's existence.

First, these connections mean inspiration. The value of meeting peers working in similar contexts has been discussed above (see page 8).

Advocacy benefitting both the local, national, regional and the European levels

EPIM helped ECRE, the European Council on Refugees and Exiles, develop the Asylum Information Database (AIDA). It provides comparative information on asylum procedures, reception conditions, detention, and protection in 20 European countries through a network of national member informants. This support clearly benefitted national actors, who could newly compare their country to neighbours and European standards. On top of that, it also weaved a map of the reality of asylum across Europe, useful to the European polity.

Second, these connections mean alignment. EPIM members can align more closely with their European peers in a field that presents multi-faceted, systematic and structural challenges. Importantly, there is no opposition of national versus European. Managed well, a pooled fund allows national issues to shine through and feed European work, while also benefiting from it. The smallest local foundations have much to gain from European collaboration, and bring unique expertise and perspectives that benefit others in many ways.

Challenge

It can and has been difficult for some foundations and grantees to see the benefits of working at the European level. However, they grew to understand that long-term impact required tackling not only symptoms (no capacity or adequate processes to receive larger numbers of migrants), but causes too (incoherent or misguided policy). In addition, advocacy at the European level sparked novel advocacy at home on specific topics, thanks to EPIM's support.

“EPIM’s funding made it possible for us to link practical work on the ground with our advocacy before EU institutions on alternatives to detention. Previously, this had been challenging. It’s a complex and innovative project related to a sensitive issue, and EPIM funding made the difference.”

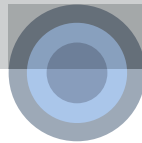
JEM STEVENS, INTERNATIONAL DETENTION COALITION ON THE ALTERNATIVES TO DETENTION NETWORK



Centre for Legal Aid © Victoria Nicolova

5. WHAT MADE EPIM WORK?

EPIM's longevity and success to date show that collaboration can work well, benefiting foundations and grantees alike. Sustaining such a programme requires investing in strong structures, establishing long-term partnerships, and above all continual reflection, openness, flexibility and trust.



THE EPIM GOVERNANCE MODEL

EPIM restructured itself in 2015, learning from experience and marking its evolution towards a robust pooled funding model. This change attracted 16 new foundations, which became Partner or Associate members.

SUB-FUNDS

The main novelty has been EPIM's sub-funds: autonomously managed grant-making entities with their own strategy, priorities, budget, grantees and evaluations. Extensive consultations with members, grantees and field experts led to creating six sub-funds:

- Immigration detention
- Asylum in Europe
- Mobile EU citizens' access to housing and social benefits
- Long-term prospects and protection of children on the move in Europe
- Enhancing social inclusion in European societies
- Communicating on migration in a changing environment

Importantly, foundations don't have to support all of EPIM's activities financially but can contribute to one or several sub-funds. This new approach allowed member foundations to direct their resources in line with their specific interests.

Challenge

Prior to sub-funds, it had been hard for EPIM members to agree on EPIM's strategic priorities. The sub-fund approach now allows members to invest in line with their own priorities. In short, EPIM evolved from a one-size-fits-all collaborative to a flexible à la carte hub, doing away with rigidity.

“Creating the sub-funds was a good development: it enables funders to target their contributions, and so EPIM now attracts foundations that probably wouldn’t have been interested without this option.”

RAPHAELA SCHWEIGER, ROBERT BOSCH STIFTUNG

This new structure also made EPIM more attractive to smaller, more focused foundations that may not have liked to see their funds “diluted” in larger priorities.

Equal opportunity to participate

To avoid a differing sense of ownership between smaller and larger members, EPIM’s governance model allows foundations to contribute not only funds, but also expertise to sub-funds. This way, each foundation has a voice no matter its size or the size of its contribution, ensuring positive peer recognition and learning.

Sub-funds also enabled EPIM to better target its funding, increasing impact. Instead of one large, unwieldy strategy for an entire field, sub-funds with their own strategy allow seizing opportunities and addressing funding gaps with greater granularity.

Similarly, sub-funds now allow grantees to apply where funding most meets their needs, instead of having to compete with an entire field.

THE SECRETARIAT

EPIM’s success is often linked to a strong and stable Secretariat, supported by NEF’s experience and infrastructure. EPIM’s three-member-strong Secretariat is a trusted and competent team. They are EPIM’s in-house adviser and facilitator, and its de facto gravity centre. Its role and size gradually increased, as experience made clear what resources were necessary to delivering an effective “funding plus” approach (see page 17).

One strength of the Secretariat is its bespoke approach to working with each member, no matter its size, focus or specific approach. Staff invest time and effort in managing each relationship individually. Building trust and strengthening collaboration require always keeping in mind each foundation’s perspective. This important task enables staff to help steer consensus, and nurture a joint vision meaningful to everyone.

Challenge

Sub-funds brought flexibility, but how could they be evaluated in comparable ways? The Secretariat consulted each member, and suggested a joint evaluation approach. It uses a theory of change model, allowing the programme to effectively compare results over time and speak a shared evaluation language.

NEF's experience in funding collaboratives also added much to EPIM's strength. NEF is enjoyably non-bureaucratic and efficient; this mitigates the risk of slow responses, and avoids complications in the grant-making process.

“Really, NEF should be applauded as the initiator and facilitator of a tremendously important opportunity to learn and work together.” TIM PARRITT, OAK FOUNDATION

CREATING LINKAGES

New, productive and mutually-beneficial links are evident in EPIM's grant-making. In its “Long-term prospects and protection of children on the move in Europe” sub-fund, EPIM supports grantees through two entry points. First, a pooled fund supports organisations working at the European level, as well as small organisations with limited capacity helping unaccompanied minors in Greece. Second, an aligned fund provides EPIM money directly in-country, through member foundations. This proved the most pragmatic solution where national foundations were in direct contact with national CSOs.

“It seems difficult for European States to come together: everyone is left to face problems with young, unaccompanied migrants on their own. So it's good to see foundations work together in EPIM.” BRUNA BELLINI, FONDAZIONE CARIPLO

EPIM also created successful linkages by setting up space for dialogue between actors that don't tend to consider themselves partners. Neither an advocate nor a network but a platform, one of EPIM's main contributions to the field has been to provide space for dialogue, exposing different actors part of the same field – local, national and European; civil society and authorities – to one another. EPIM uniquely enables different actors to communicate their realities and constraints to one another.

Emulating EPIM

In Italy, eight experienced foundations started working collaboratively, joining EPIM's “Children on the move” sub-fund together. They use their own coordinating staff, and work in alignment with EPIM's sub-fund – also using the “funding plus” approach.

REPUTATION AND CONNECTION TO THE FIELD

EPIM connects its member foundations and grantees to the field of migration and integration in Europe. The Secretariat maintains strong relationships with grantee and non-grantee CSOs, experts and policy-makers, harnessing these connections to inform the programme's strategies. This gives EPIM a diverse, balanced and holistic view of the field, which helps identify gaps in funding.

Viewed as a trusted partner by all parties (as far as the author can tell), EPIM's continuous exposure to developments in the field also benefits members who are informed by more voices, expert analysis, and feedback from field actors who aren't foundations or CSOs themselves.

THE “FUNDING PLUS” APPROACH: GOING BEYOND GRANT-MAKING

To meet these multi-faceted challenges, EPIM intentionally set out to do more than grant-making alone. **It offers grantees – as well as others working in the field of integration and migration – a comprehensive and flexible programme of support and network to achieve sustainable impact.**

The “funding plus” approach entails going beyond grant-making alone to support organisations of different sizes and capacities, building their capacity as organisations or providing additional content support. This happens by offering member foundations' and the Secretariat's connections in the field to grantees; organising convenings for member foundations and grantees; offering expert training courses or workshops; providing additional intelligence in the form of research and focused analysis; and in many more ways, all throughout the funding cycle and always guided by grantees' needs.

“The strategic meetings hosted by EPIM where funders and grantees come together discussing big picture issues: in my experience, this is unique and I believe it adds tremendous value to the work.” EIRI OHTANI, IMMIGRATION DETENTION EXPERT

Challenge

Initially, “funding plus” efforts focused on organising conferences and workshops for grantees and EPIM's wider network. But members, grantees and the Secretariat felt this activity-led approach wasn't effective. EPIM switched to an outcome-led approach: “funding plus” activities such as events are determined by grantees' needs, and designed in collaboration with them through in-depth conversations.

Taking the lead from grantees when providing support

When grantees requested training on strategic communication, EPIM could have simply obliged. Instead, EPIM worked with grantees to understand their needs in greater detail, and chose to invest in strategic communication long-term: it decided to offer continuous coaching so grantees would effectively improve in this area.

When relevant, the Secretariat also provides smaller learning grants to grantees. These grants don't have to be directly related to funded projects, and may include learning visits, attending events, proposal-writing workshops, etc. These can be provided upon grantees' request, or suggested by the Secretariat.

In short, the "funding plus" approach helps increase grantees' capacity, which in turns improves the quality of their work in the interests of all those involved.

FLEXIBILITY AND LEARNING

EPIM uses a flexible and non-bureaucratic approach to funding, and adapts to grantees' capacity and reality. The programme creates space for grantees to explore emerging issues and seize opportunities that enhance their work and its impact. Grantees have reported enjoying EPIM's less restrictive reporting constraints, compared to other funders. Many grantees also value EPIM's flexibility to continuously adapt projects on the basis of lessons learned.

This flexible approach to grant-making, combined with EPIM's reputation, results in an increasing number of organisations asking EPIM for support in developing innovative projects.

From seed project and flexible funding to EU-funded action

The sub-fund on immigration detention supported pilot projects exploring alternatives to detention, based on procedures focusing on case resolution – methods that had no evidence base in Europe. EPIM and its grantees argued that support for this approach was in the interest of all parties involved, both in terms of human rights protection and to reduce the costs associated with detention. These pilot projects generated evidence strongly supporting this message.

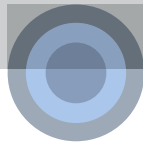
The risk of investing in a new and untested strategy paid off: the concept now receives extensive attention from EU institutions and Member States, where solutions for alternatives to detention are in high demand.

This work reflects the benefits of EPIM's openness to new ideas; of the bravery to test new approaches conceived collaboratively; and of combining expertise in the field with the collective intelligence of funders and grantees working together.

6. KEY LESSONS

What lessons does EPIM hold for funders keen to establish or improve similar collaboratives, in potentially completely different policy areas?

The main lesson: carefully-guided partnership and collaboration – in short, co-creation – deliver results impossible to generate otherwise.



“EPIM really is my favourite funder. The Secretariat is very helpful. Training courses on intervention logic and monitoring and evaluation clarified what funders expect. And perhaps most importantly, EPIM allows seizing opportunities during a project’s implementation.”

CORINA DROUSIOTOU, FUTURE WORLDS CENTER

STARTING

- 🕒 **Be very clear on what you want to achieve.** This requires great amounts of time, patience and openness. If you can’t agree, don’t force collaboration: partners’ vision and passion must be compatible and enable one another. Ask yourself whether everything fits well.
- 🕒 **Make the rules precise.** Provide clear and transparent rules for the partnership, agreed with all co-founders. Minimise future misunderstandings.
- 🕒 **Be ambitious, but start small.** Rigid strategy belongs to the 1990s. The 2020s require agility and iteration: start small but firm, and organically grow a sustainable partnership over time.
- 🕒 **Back your idea with thorough research.** Avoid working on assumptions. Instead, hold conversations with prospective members, grantees and experts in and outside of philanthropy to craft the strongest possible framework for a new pooled fund.
- 🕒 **Understand your environment, and design your collaborative with added value in mind.** Rely on your and partners’ expertise to determine how your pooled fund will generate unique value for its field.

STEERING

- 👉 **Put time, effort and resources into strong structures and processes.** Most importantly, invest in an expert and capable Secretariat. They will be the guardians of the pooled fund's common interests.
- 👉 **Put time, effort and resources into strong relationships.** Building trust takes time, yet is essential. In the long run, understanding partners' red lines to generate consensus and a shared vision cannot take place without personal conversations and strong relationships.

STRATEGISING

- 👉 **Be open, flexible and understanding of prospective members' interests and priorities.**
- 👉 **Constantly evaluate your action.** Adapt to new learning about what works best. Agree outcomes together, but leave space and flexibility to adjust activities along the way.
- 👉 **It's crucial to see members as more than just cash contributors.** They're experts in their own fields and geographies. Rely on them for expertise and co-guidance.
- 👉 **Don't focus on a single methodology, such as grant-making. Instead, look at what the field needs.** Through research and connections to those in the field, you may discover CSOs require capacity-building, convenings to share expertise, new research, etc.
- 👉 **Listen to what each member wants, and adapt within the boundaries set in your shared vision.** Pooled funds are essentially a great big new adventure with a new team of partners. Collegial leadership is essential to make it a success.



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