

# 1

“We had first-date chemistry. We just instantly understood each other.”

“I can feel our IL wants us to succeed.”

## INSIGHT

**Grantees value deep and trusting relationships with funders, grounded in subject area expertise.**

A strong relationship between the funder and grantee builds trust, enabling the grantee to take more initiative and negotiate for their needs. Partnering with an investment lead (IL) or program officer with subject area expertise is especially critical for grantees to feel like their work is understood.

“Our IL remembers things we told them a year ago.”

“Our IL is constructive, smart, wise, and diligent.”

“There was a big values overlap.”

“For the first time, we were talking to people who actually get it.”

## Insights

The investment lead (IL) was seen by participants as the face of GCE for grantees.<sup>3</sup> A positive experience with an IL reflects very well on the organization as a whole. IL's with deep subject area knowledge are particularly valued.

The ILs' extensive knowledge about the space made the grantees feel understood and heard, and contributed to an overall feeling of alignment with GCE as a team. One participant expressed this as really valuing the “professional, constructive, and encouraging thinking partner that our contact (IL) embodies.”

Organizations who had a close relationship with their ILs were uniformly positive about their IL's capabilities and the amount of personal attention they received. “They've truly felt as much like thought partners and co-conspirators in our work as they do funders,” wrote one organization in the survey.

GCE's openness to collaboration and negotiation was regarded as extremely positive for those who had taken the initiative to take advantage of it. Grantees who were confident enough to push back — usually with regard to metrics or reporting — felt respected and heard, and often got what they asked for. Having pushed back didn't seem to hurt their reputation or relationship with GCE — if anything, it seemed to lead to greater mutual respect.

### THEMES

- > Trust & Power
- > Funding Approach & Process

---

<sup>3</sup> Investment Lead (IL) is a similar role to a Program Officer at a foundation.

# Recommendations

Cultivating relationships takes time and intentionality. To building deep, trusting relationships grounded in subject area expertise, we recommend the following:

- Support professional development of investment leads to develop expertise in the field in which they are managing grants.
- Clarify roles and responsibilities of key people involved in relationship management with the grantee. This is particularly important for creating a deep and trusting relationship and provides clarity over who the grantee should direct questions to.
- Be clear about expectations and responsibilities of grantees once in the portfolio e.g., with regards to reporting, evaluation, and expected duration of support.
- Give sufficient time to develop an impact measurement framework that a grantee is comfortable with, e.g., consider allocating time at the beginning of a grant term to dedicate to working on co-designing indicators that are outcome-driven and aligned with the grantee organization's strategy.
- Look for opportunities to model transparency and honesty in communications with grantees. Greater transparency from funders around their own challenges and failures will help grantees by reinforcing that their experiences are normal, expected, and worthy of support, and will facilitate a more productive and beneficial funding relationship for both parties.