

Fund for Shared Insight

2016 Grantee Interview Themes

December 2016

In October and November 2016, ORS Impact interviewed representatives from the 13 organizations with ongoing Feedback Practice, Feedback Research, and Openness grants from the Fund for Shared Insight. As in 2015, ORS completed these interviews to capture information about grantee progress, lessons learned, and insights based on grantees' funded work. Below we summarize findings by grantee clusters as well as raise up observations and considerations.

Feedback Loop Practice

Reflections from Practice and Research Grantees¹

- Organizations are at different stages of evolution relative to their feedback work: some organizations are at an earlier, more exploratory stage, while others are further along in their experimentation and implementation of feedback loops.
- Grantees across Practice and Research continue to work to strengthen the quality of their feedback loops, defined by Shared Insight as that which is systematically collected, acted upon, and shared back with stakeholders. All grantees continue to experiment with ways to ensure effective methods for seeking feedback, asking for feedback that elicits actionable and candid responses, ensuring variability of responses from questions asked, and balancing customization/standardization across different communities and constituencies.
- Some grantees report closing the loop with their constituents. While all grantees continue to work on the technical challenges associated with collecting high-quality feedback, those further along in their feedback work are talking more about the challenges of building a culture of feedback and learning compared to last year.
- Facilitators to this work continue to include leadership support, ability to have internal capacity around implementation, and relationships with the constituents from whom grantees are collecting feedback. Many grantees are reporting a good appetite/demand for this work among leadership, staff, and constituents themselves. However, barriers continue to exist around variability of

¹ While there is not a perfect alignment between Practice and Research grants, we continue to analyze them jointly because (a) we are hearing similar lessons between Practice and Research grantees, and (b) the heterogeneity of Research grants limits the ability to find common themes across that group.



feedback and worries about levels of candor. All the Practice grantees find value in qualitative data and are still working through how to incorporate it in ways that can be done efficiently and at scale.

- Across Practice and Research grantees, there continues to be a positive sense of momentum in the field. Many are seeing growing interest among a broader audience and increasing sophistication of the conversations they have about feedback. They are sharing at conferences and connecting with other grantees, mentioning most frequently CEO, Feedback Labs, and LIFT. Research grantees appreciated hearing about Practice grantee experience and having the opportunity to meet as a specific Research sub-group during the convening. Habitat for Humanity and Feeding America also talked about connecting, given their similar structures.

Infrastructure for Feedback Loop Practice Grantees

Because of their focus on providing resources, tools, consultation, and platforms for encouraging the collection and use of beneficiary feedback, we found it helpful to once again look separately at the lessons from Feedback Labs, GlobalGiving, Keystone Accountability, and YouthTruth, as we did in 2015.

- Grantees report greater demand among their audiences since last year, including more donor feedback participation, greater participation in feedback-related events, and greater uptake for consulting and related services. This represents a change from last year, when there was momentum around the idea of feedback loops but less actual implementation. There is a sense among some that demand for tools is beginning to exceed supply.
- In general, infrastructure grantees have seen a shift in the degree to which they are making a case for feedback; instead, conversations focus on more advanced aspects of the “how” rather than the “why.” With this change, they see a growing need to clarify and develop common language (i.e. feedback as differentiated from outcome evaluation or traditional M&E).
- Connections across Practice infrastructure grantees are relatively strong, as are some connections with specific Practice grantees.
- When asked about trends and needs going forward, grantees talked about a shared research agenda, more vehicles/investments in collaboration and leadership, and efforts to increase the degree to which funders can help drive demand without making it a “check the box” kind of activity.

Considerations for Ongoing Practice-Related Investments and Efforts

- *Closing the Loop*: Achieving high-quality feedback practices includes closing the loop. We are seeing progress in this area for some of the grantees this year, and grantees are learning that having specific processes and capacity in place are necessary to do this well. **Are there ways in which the experience of some grantees in this area can help accelerate activities for those less far along or in Listen for Good supports and resources?**



- *Learning about Equity within Practice:* We have opted not to ask grantees explicitly about their work related to Diversity, Equity, and Inclusion (DEI) practices and focus since it was not initially part of their grant expectations. A few grantees, however, expressed unsolicited interest in this topic related to their work for Shared Insight. In this final year of their grant, it could be interesting to learn more from these organizations. **Could Shared Insight provide an opportunity to “opt in” to a more intentional focus and set of learnings related to DEI as this round of the initiative comes to a close?**
- *Connecting to Other Related Efforts:* Several grantees in this area mentioned their connections with Leap of Reason. One Openness grantee noted a caution that Shared Insight’s efforts should not inadvertently “elbow out” other activities naturally occurring in the field. **Are there ways in which it would be useful to more explicitly link to other activities or to broaden the tent?**
- *Utility of a Field Focus:* Based on the White House workshop and our review of the interview data, we looked to the literature to better understand how to define a “field” as a way to understand this body of work. Specific elements comprise a field when considering field building: identity, knowledge base, standard practice, information exchange, infrastructure for collaboration, professional development, resources, and systemic support.² As we look at the work to date and grantees’ desire for future focus, we see many of these elements at play. **Would this kind of framework be useful in thinking about future decisions and evaluating progress?**
- *Scaling Feedback Practice:* Shared Insight’s initial Practice investments began with an open and emergent approach to see how the increased use of high-quality feedback in the field could be spurred and accelerated. So far, initial findings from these grants and Listen for Good suggest some success. However, scaling this work cannot happen at the same level of intense investment in individual organizations. **Would it be useful to consider exactly what needs to be scaled at this point in time: an idea or an innovation (e.g., a new way of thinking about or doing something), a skill (i.e. increasing the number of people or places that use or apply a practice or approach), or something else?** Scaling different things brings to bear different key assumptions, elements, and influencing variables that can be addressed.³

² Adapted from Fine, M. (2001). What does field-building mean for service-learning advocates?

³ Coffman, J. (2010). Broadening the Perspective on Scale. *Evaluation Exchange*, Volume XV, Number 1, Spring.



Openness

While a set of 10 new Openness grants were made this summer, only three organizations had active grants whom we interviewed this fall, representing a range of approaches to supporting openness—research, video dissemination/campaign, and platform/technical support.

Final Reflections from Round 1 Openness Grantees

- All grants were generally executed as intended and on track. Some specific successes included short, easy-to-digest content (e.g., CEP’s 2x2 table in their report cross-walking current levels of transparency and beliefs about the degree to which different types of transparency increase effectiveness), and clearer messages for communicating about openness over time.
- All grantees expressed that they are not experiencing any active pushback in the field around the idea of openness; at the same time, in a crowded “marketplace,” uptake of the organizations’ work is lower than expected or hoped for. There is also still some challenge in changing practice since foundations see themselves as “unique,” so efforts to change practice can feel “custom” and “one-off.”
- Work related to openness across these grantees did not naturally prove synergistic. There was not a lot of new connectivity across these grantees and no cohesive views about the field or sector “headwinds” and “tailwinds.”⁴ Specific comments around tailwinds included: growth of Knowledge Management profession/positions may continue to build demand, and an opportunity to link Openness more explicitly with DEI conversations in the field. Possible headwinds included: potential for increased scrutiny of foundations post-election; a lack of support for greater alignment/coordination across Openness infrastructure organizations (e.g., Creative Commons, Internet Archive, etc.) and across related field efforts (e.g., transparency); and media finding a “hook” for openness around “what are foundations hiding.”

Considerations for Ongoing Openness Work

- *Uptake*: Current grantees reflected that they had less uptake in their work than they had hoped, but their greatest uptake was when their target audiences saw others like them or leaders in the philanthropic field talking about how they do their work or taking specific actions. With seven of the next 10 grantees working on convenings/trainings and platforms/tools, it is worth considering the uptake experienced by the first round of grantees. **Could Shared Insight be a more active voice in the sector on this issue? Are there other ways to address the bandwidth/information competition issue?**
- *Synergy*: As noted above, the first round of Openness grantees experienced little additional connectivity/synergy with each other; Feedback grantees, on the other hand, seemed to have more

⁴ CEP’s report did help to soften the ground with some audiences.



benefits from some of their connections. **Are there benefits to fostering cross-grantee connections within and across the efforts associated with research, platforms/tools, and convenings/trainings?**

- *Potential to Accelerate*: Grantee feedback suggests an acceleration of activity and sense of momentum for Feedback work, while Openness grantees saw more competition for openness in the “ideas” in the philanthropic sector. **Is there an opportunity to have Openness work benefit from the momentum being seen around Feedback?** There are already some connections in the next round of Openness grants with feedback that began this summer. **Could Openness be more closely aligned with other topics with momentum? Or is Openness on a reasonable trajectory that should play out differently?**

Conclusion

Feedback at this juncture indicates that individual grants and clusters of grants from the first round of grantmaking are on track. We hope that some of the lessons learned and observations across grantees can help Shared Insight think about how to best leverage the final year of these grants to further the work, as well as think about applying these lessons to the next three-year cycle of the collaborative.