

FUND FOR SHARED INSIGHT: AN OVERVIEW FOR FUNDERS



WHAT IS FUND FOR SHARED INSIGHT?

Fund for Shared Insight is a funder collaborative that pools financial and other resources to make grants to improve philanthropy. American foundations spend billions of dollars each year to address society's toughest challenges, yet many do not have accessible tools to gather and analyze feedback from the people they seek to help. Shared Insight supports foundations and nonprofits seeking to embrace and adopt feedback loops and share honest insights so their collective efforts have a greater impact on people's lives.

We believe this will make foundations and nonprofits more effective and accelerate efforts to solve our society's greatest challenges.

FUND FOR SHARED INSIGHT **BY THE NUMBERS**

4 YEARS IN
OPERATION

184 **78**
GRANTEES FUNDING
PARTNERS

\$21,100,000
GRANT FUNDS ALLOCATED

EARLY SUCCESS

Since our launch in July 2014, the momentum around Shared Insight has grown at an inspiring rate. We started with seven founding funders supporting 14 nonprofits. As of January 2018, we are proud to have 78 funding partners and 184 grantees working on feedback practice, research, and openness.

Among other accomplishments, Shared Insight has:

- Co-hosted a workshop with the **White House** on data-driven feedback loops.
- Funded and released major projects around foundation openness, including the Center for Effective Philanthropy report, “**Sharing What Matters: Foundation Transparency,**” and Exponent Philanthropy’s nine-part video series called **Philanthropy Lessons**, that has garnered more than 36,000 views since it launched.
- Taken the simple idea of a straightforward, low-cost approach to collecting feedback and launched a nationwide initiative called **Listen for Good (L4G)**.
- Actively engaged in dialogue with the field through major philanthropy outlets, including the Chronicle of Philanthropy, the Stanford Social Innovation Review, Nonprofit Chronicles, Alliance magazine, and Social Velocity.

FOCUSED ON THE FUTURE

The Future of Foundation Philanthropy: The CEO Perspective, a research report by the Center for Effective Philanthropy, reveals that foundation CEOs see listening to and learning from those they seek to help as the number one path to greater impact. This signals a critical role for Shared Insight and greater urgency across the philanthropic community to activate the principles that are at the heart of our work. And with early lessons learned from our work rolling in, the highlights above are just the beginning of the progress we can make together.

By fully implementing feedback loops and increasing openness, nonprofits and foundations can learn from and better listen to those whose voices are often forgotten. Ultimately, our goal is to bring the diverse voices of the people at the heart of our work into foundations' boardroom deliberations. To achieve that goal, we are actively exploring how we can bring lenses of diversity, equity, and inclusion to this work. To help foundations become more effective, we will support efforts to increase openness, which includes listening and engaging in dialogue and encouraging foundations to share what they themselves have learned. We need the support of others to make sure we are hearing from those who are least heard, and embracing practices that will help us and our grantees reach our goals.



Looking to the future, most CEOs believe foundations can take better advantage of their unique role to experiment, innovate, collaborate, and convene, and **they see listening to and learning from those they seek to help as the number one path to greater impact.**

JOIN THE INITIATIVE

Learn more about how you can get involved on **PAGE 10.**

OUR WORK IN ACTION:
**MANY VOICES.
RICHER DATA.
BETTER RESULTS.**

With many of our grants in progress, we are excited to highlight early examples of our work and look forward to sharing more substantive findings as our nonprofit partners share what they learn from their grants.

Shared Insight awards grants to nonprofit organizations in three categories:

1
Practice
PRACTICE OF
FEEDBACK LOOPS

2
Research
FEEDBACK RESEARCH

3
Support
FOUNDATION OPENNESS

COLLABORATIVE APPROACHES
TO HEARING FROM THE
PEOPLE WE SEEK TO HELP

INCREASE FOUNDATION
LISTENING AND
SHARING

1 Practice

PRACTICE OF FEEDBACK LOOPS

The Center for Effective Philanthropy’s 2014 report entitled “Hearing from Those We Seek to Help: Nonprofit Practices and Perspectives in Beneficiary Feedback,” found that most nonprofits are collecting and using feedback from their beneficiaries to improve their programs and services. However, nonprofit leaders believe most of their foundation funders lack a deep understanding of their intended beneficiaries’ needs. And most nonprofits are not collecting feedback in a systematic, ongoing, and benchmarkable way.

In December 2014, we made grants to seven organizations that were already collecting feedback from the people they seek to help and had the potential to scale their work on feedback loops. Over the past three years, we have learned a lot about how to collect ongoing, systematic feedback.

In a survey of the first round of Listen for Good participants, a majority of **agency leaders say they are finding actionable data for their organizations to improve services for their constituents.**



Building on our experience with the first set of feedback practice grantees, we sought to create a ripple effect to engage more funders and support a larger and broader group of nonprofits to build or improve feedback loops.

We developed and launched Listen for Good (L4G), a multi-sector partnership among Shared Insight, SurveyMonkey (a private

company with a scaled survey platform), co-funders, and U.S.-based, customer-facing nonprofits. L4G is focused on applying a semi-standard survey instrument, which includes the Net Promoter SystemSM (NPS[®]) used widely in customer feedback circles, to the nonprofit beneficiary context. Since 2016, we have made 158 Listen for Good grants supported by 69 nominating co-funders.

For nonprofits, this systematic feedback can provide important and actionable ideas for improvement. For example, through L4G, Nurse-Family Partnership (NFP) has gathered feedback from nearly 2,000 young mothers. NFP positively transforms the lives of vulnerable babies, mothers, and families with a focus on supporting moms during the first 1,000 days between early pregnancy and the baby's second birthday. In launching L4G, NFP piloted the use of text-based messaging with its mothers for the very first time. The reaction to receiving the survey via text was much more positive than NFP expected and provided support for NFP's ongoing efforts to modernize its outreach to clients.

The feedback gathered through NFP highlighted numerous themes. Specifically, NFP received feedback that women would like more opportunities to connect with other NFP moms. NFP responded by providing ideas and recommendations to local agencies on ways to connect clients to each other and also referred NFP moms to its NFP Community Facebook page, which had not been previously advertised. A private FB group for NFP mothers is being developed as a result of this request from clients.

NFP's analysis also revealed that clients who meet less often with their nurse (i.e. once a month or less frequently) rated NFP consistently lower than moms who meet more frequently – which may inform future internal conversations about program dosage. To close the loop with moms, NFP has created a mobile-optimized website highlighting the feedback received from L4G and the organization's planned responses.

To date, almost all of the organizations participating in L4G have completed at least one round of collecting feedback from the people they seek to help. Many have completed two or three rounds, and are making changes based on what they heard, which will improve their services and participant experiences.



In a survey of the first round of L4G grantees, our evaluation partner, ORS Impact, found that, of the organizations that had started responding to collected data, nearly nine out of 10 reported “thinking differently” about their work based on the feedback, and eight out of 10 found information from the data actionable

Additionally, analyses of the L4G data show we are making progress on our goal to hear from the voices least heard, including historically or currently marginalized individuals and communities. To date, approximately 80 percent of L4G respondents identify as people of color; over two-thirds of respondents identify as female; and youth ages 13-17 form the single largest group of respondents by age.

A complete list and detailed information about our L4G grantees is available on our website.

2 Research



FEEDBACK RESEARCH

Through the four feedback research grants we have made to date, Shared Insight supports research on how to best implement feedback loops and explore the potential relationship between perceptual feedback and future outcomes. For example, research in the education sector has shown a relationship between a student feeling respected by her teacher and that student's educational outcomes. Our goal is to identify these leading indicators of future outcomes in the human-services field.

One of our grants is to a joint project of Urban Institute and Feeding America. Urban Institute conducts research and offers evidence-based solutions to pressing social and economic problems. Feeding America is a nationwide network of 200 food banks that provides food to more than 46 million people annually. Together, these partners are rigorously piloting methods for gathering client feedback, using the results to improve services. What's more, they are communicating to clients how their input is making a difference, thereby creating a continuous learning culture. The most effective methods will then be rolled out across the Feeding America network.

For a full list and detailed information about our feedback research grantees, please visit our website.

3 Support Foundation Openness

INCREASE FOUNDATION LISTENING AND SHARING

The motivation driving Shared Insight's interest in increasing foundation openness is effectiveness. We believe that if foundations are more open – which we define as how they communicate about their goals and strategies; make decisions and measure progress; listen and engage in dialogue with others; act on what they hear; and share what they have learned – they will be more effective.

Shared Insight funded a recent study by the Center for Effective Philanthropy that found that 94 percent of foundation CEOs state that being transparent is a medium-to-high priority.

A major finding from the study was that foundations have opportunities to be more transparent about how they assess their own work and their learnings about what worked and what didn't work. In 2016, we selected a new portfolio of 10 organizations that are working on various strategies to increase foundation openness. For example, we funded the Women's Funding Network to analyze the openness, accountability, and transparency practices of 90 women's foundations and to share the findings.

A full list and detailed information about our foundation openness grantees is available on our website.



CORE FUNDERS

Fund for Shared Insight is now 78 foundations strong, and is led by 13 core funders. A complete list of our funders is available on our website.

Shared Insight is a sponsored project of **Rockefeller Philanthropy Advisors (RPA)**.



JOIN FUND FOR SHARED INSIGHT: THREE WAYS TO GET INVOLVED

Funders have the opportunity to be at the forefront of improving philanthropy. We are encouraged by the passion of those who are already part of Shared Insight and are seeking new funders to join our dynamic learning community and support this important work. There are three ways for you to get involved as a funder:

TO LEARN MORE, CONTACT: MELINDA TUAN

Managing Director
melinda@fundforsharedinsight.org

CORE FUNDERS

Core funders commit a minimum of \$250,000/year for a general project-support grant for three years. They also play a key strategic role in our efforts by joining three in-person core funder meetings per year and participating in the grant-making process. Core funders have the option to participate in one or more subcommittees based on their foundation's interests. They can also play a crucial role by authoring blog posts or articles about our work, sharing information with their network via email and social media, and cultivating interest among other funders in joining the collaborative.

SIDECAR FUNDERS

For funders who want to support the work of Fund for Shared Insight but cannot make the three-year, \$250,000/year minimum commitment to join as a core funder, we invite them to join as a "sidecar" funder. Sidecar funders provide a one- or two-year grant to support Shared Insight. These grants have ranged from \$50,000 to \$300,000 and have been used for general support or targeted for a specific geography (e.g. California or global work) or activity (e.g. evaluation). We invite sidecar funders to our core funder dinners and any special events.

L4G CO-FUNDERS

Listen for Good (L4G) is a grant initiative of Fund for Shared Insight launched in 2016, that is dedicated to building the practice of listening to the people we seek to help. To participate in L4G, a nonprofit must be nominated by a current funder. Nominating co-funders contribute \$15,000, which is matched by \$30,000 from Shared Insight for a combined \$45,000, two-year grant. To learn more about how to become a L4G nominating co-funder, please visit: <http://www.fundforsharedinsight.org/listen-for-good-overview>*

*Please note that core and sidecar funders are encouraged to nominate their grantees and participate as a L4G co-funders, as well.

PROJECT LEADERSHIP

FAY TWERSKY

William and Flora Hewlett Foundation
Co-Chair, Fund for Shared Insight

KATHY REICH

Ford Foundation
Co-Chair, Fund for Shared Insight

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NICKY CONROY

Gordon and Betty Moore Foundation

ARELIS E. DIAZ

W.K. Kellogg Foundation

JON GRUBER

Einhorn Family Charitable Trust

KELLEY GULLEY

The James Irvine Foundation

KIM AMMANN HOWARD

The James Irvine Foundation

BETSY KREBS

The JPB Foundation

VERONICA OLAZABAL

The Rockefeller Foundation

MEREDITH BLAIR PEARLMAN

David and Lucile Packard Foundation

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LISSETTE RODRIGUEZ

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JENNIFER HOOS ROTHBERG

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NAGEEB SUMAR

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