FUND FOR SHARED INSIGHT

Evaluating the

Accomplishments & Lessons Learned

from the first three years

ORSIMPACT

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Introduction

In July 2014, a group of seven funders formally pooled funds and decided to embark on a joint venture under the banner of Fund for Shared Insight. As a collaborative, these funders sought to improve the effectiveness of philanthropy by funding and supporting three areas of work: feedback practice, feedback research, and foundation listening and sharing.

As recently memorialized in a set of guiding principles, Shared Insight is a learning organization, making an early decision to commit to an evaluation partner to walk with, help reflect on, and hold a mirror up to the collaborative and its work. Over the first three years, ORS Impact has served as this evaluation partner, participating in core funder meetings and sub-committee meetings, as well as collecting, analyzing, and reporting on data for different aspects of the work.

This report provides an overview of our assessment for how Shared Insight has done as a whole these first three years. We've pulled from all of the data collected and evaluation products produced, and reviewed other existing data sources, such as meeting materials and notes. In our analysis, we focused on questions like:

- What do we think has changed as a result of Shared Insight's efforts?
- What have been its unique contributions, if any?
- Where has it under-achieved or mis-stepped?
- What new, useful lessons have bubbled up over time and across different activities and perspectives?

In answering these questions, we reflect back on what accomplishments emerged over time to represent how the actual work played out.

This report cannot and will not be a comprehensive telling of all aspects of Shared Insight. Other efforts are underway to study how Shared Insight has functioned over time, and to capture its journey around equity, diversity, and inclusion. Other evaluation products provide more detailed findings related to specific initiatives or efforts. The focus of this report is to take a higher-level view of the accomplishments that have been achieved and the key lessons that can be usefully taken forward into the next three years of work.

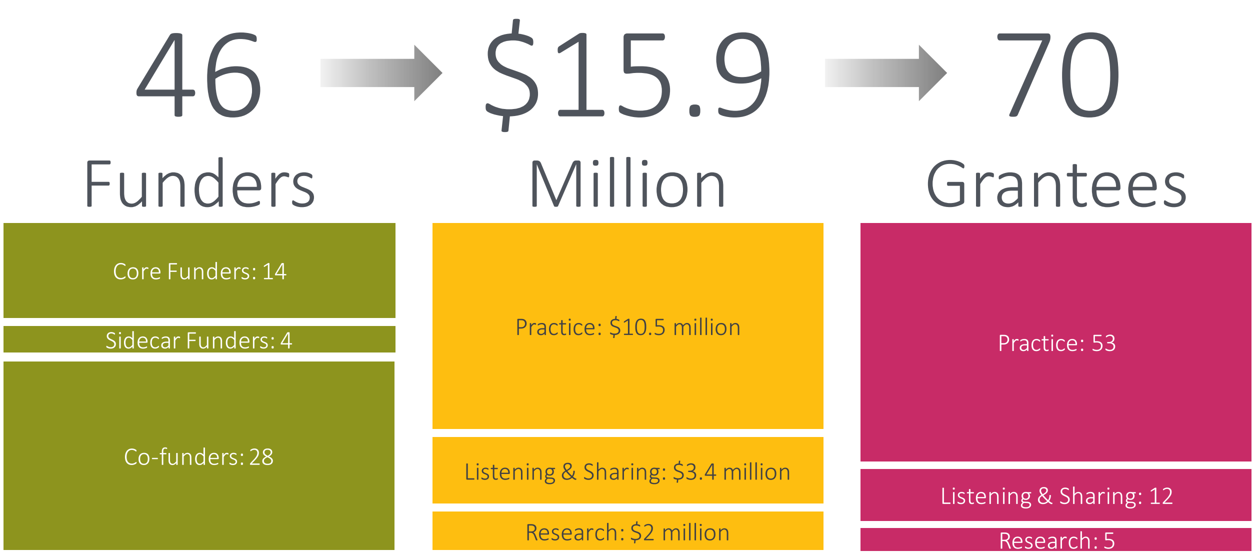
We've also written this with an eye for what we think is valuable and useful for the core funders around the table. We have not provided extensive background information that might be important for a less close-in audience and have not censored ourselves based on the potential sensitivities of broader audiences with whom findings may be shared, including grantees, other funders, or the field writ large; however, to protect confidentiality, grantee-specific evaluation findings are not included. We sought to take an unflinching look at the work to date, leveraging our closeness as a way to more deeply interrogate it. We hope this report provides useful fodder and reflection for Shared Insight as it enters its next three years.[1]

[1] More details on our data sources and methodology can be found in Appendix A.

Overview & Key Findings

Shared Insight launched as a nimble and agile collaborative that valued action, was willing to be emergent, and focused on learning over certainty and limited risk. Since it launched in 2014, Shared Insight has brought in a number of funding partners and supported a number of nonprofit grantee partners as figure 1 shows.

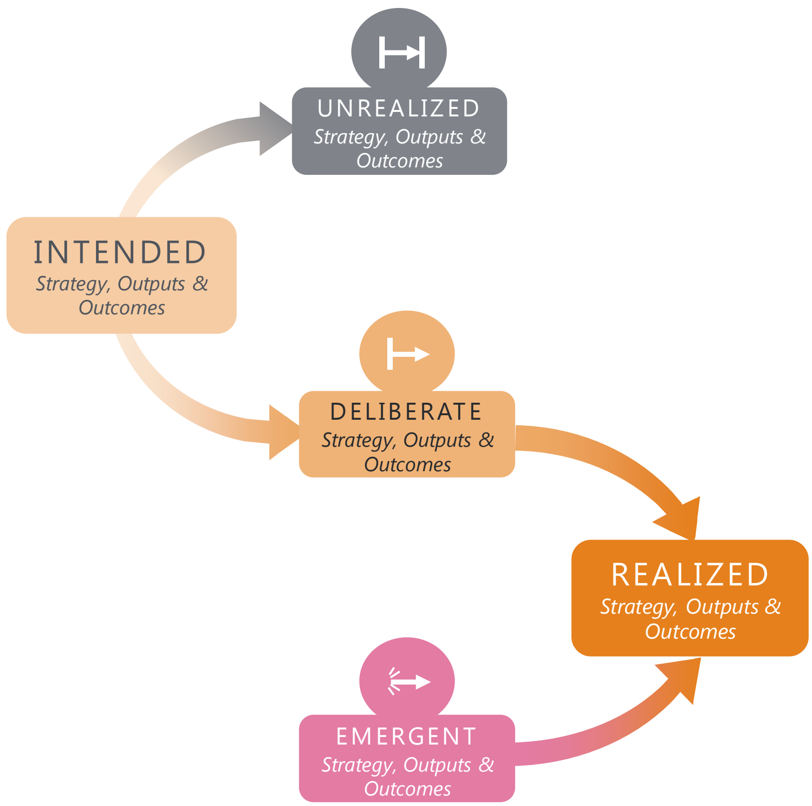
Figure 1 | Shared Insight funders, grant amounts and grantees 2014-2017



Two Practice grants, Southeast Council of Foundations and National Center for Civic Innovation, were not included in data collection.

Shared Insight's focus on co-creation and ongoing learning meant the evaluation should not judge success solely on how the work was originally conceptualized, but must adapt to how the work actually unfolded. One useful framework for thinking about the work in this way comes from Henry Mintzberg, who says that strategy is "not what a program or organization plans to do or says it does but rather, what it actually does." He distinguishes between intended strategy (the planned approaches) and realized strategy (where some of the planned strategy is unrealized, some intended strategy is realized, and some changes and new approaches come into play as emergent strategy), as shown in figure 2.

Figure 2 | Strategy Development Process



Source: Created from Mintzberg (2007, Chapter 1).

The following graphic provides an overall look at Shared Insight's strategy, outputs, and outcomes by the three major areas of the original theory of change—Feedback Practice, Feedback Research, and Foundation Listening and Sharing—including what was realized (deliberate efforts, either achieved or currently in process, and emergent components) and unrealized over time.

Figure 3 | Shared Insight 2014-2017 Overview: Realized and Unrealized

	Feedback Practice	*Feedback* Research	*Foundation* Listening & Sharing
UNREALIZED *Strategy, Outputs & Outcomes*	• Nonprofits and funders collaborate on approaches to seeking and heeding feedback from the people we seek to help • Systems for hearing from the people we seek to help are used by innovators in foundations	• Publication of early results of piloted approaches are distributed, consumed, and debated in the sector	• Increased visibility of the benefits of foundation openness
DELIBERATE *Strategy, Outputs & Outcomes*	*Achieved* • Growth and improvement in existing/new approaches to listening and learning • Systems are used by innovators in nonprofits • Feedback loops help generate ideas for improvement and course correction • Improved nonprofit practice for collecting high-quality feedback • More dialogue in the sector *In Process* • Blogs, articles, presentations, and other communications efforts • Publication of early results of piloted approaches are distributed, consumed, and debated	*In Process* • Research studies identifying how feedback data may best be collected • Research studies investigate ways that feedback can be linked to rigorous outcome measurement as a leading indicator	*In Process* • Funded organizations innovatively broaden and/or deepen their existing efforts for increasing openness in service of effectiveness • Greater awareness and prioritization of openness in foundations • More systems and supports in service of foundation openness
EMERGENT *Strategy, Outputs & Outcomes*	• Nonprofits taking action to respond to feedback • Changed nonprofit organizational cultures that support feedback • Greater definition of perceptual feedback and aspects of quality • Increased demand for and sophistication of feedback loop supports		• Sector-focused content/ resources produced: research, videos, cause write-ups, Open Knowledge Sharing principles, reports, online tools, etc. • Approx. 166 foundations reached directly through grantee activities

INTENDED
Strategy, Outputs & Outcomes

REALIZED
Strategy, Outputs & Outcomes

For the purposes of this graphic, some desired outputs and outcomes were shortened. The full original theory of change can be found in Appendix B.

As figure 3 shows, Shared Insight realized and achieved most of what it set out to do with additional emergent outcomes around changes for the field and for participating nonprofits. Less clear progress has been made around changes among foundations and feedback. The work associated with Feedback Research and Foundation Listening and Sharing is still underway, making it unclear what will be ultimately be achieved or unrealized upon completion. Across areas, there is a pattern of less strong realization of results around communications, awareness, and visibility.

The rest of this report goes into greater detail on the data behind these assessments and the key lessons learned across the areas of work over time. Following the findings, we provide six observations and resulting considerations for the core funders.

Key Findings Overview:

The following list of key findings is lifted up from the report; more details on the outcomes and lessons learned follow.

Nonprofit Feedback Practice

- Higher quality feedback practice is both possible and a good fit with the ethos of the US nonprofit sector, especially those directly serving their constituents.
- The Feedback Practice approach has evolved while still maintaining synergy and cohesion over time.
- Work so far has likely stayed with early adopters and higher capacity nonprofits.
- Closing the loop has been—and continues to be—the biggest challenge.

Foundations and Feedback Loops

- Co-funders agree on the value of feedback for nonprofits, though there is variety in the motivation behind that value.
- It's not yet clear what the ask or goal is around foundations and feedback practice work, but there is some evidence of supporting nonprofits leading to institutional changes for funders.

Feedback Field

- Without being explicitly called out as part of feedback work, infrastructure and field-building has been a large area of investment.
- Action research grants yielded less unique value in this timeframe.

- Several grantees shifted from tools and platforms to experimenting with other ways to support nonprofit practice.

Feedback Practice and Equity, Diversity, and Inclusion

- There has been a more natural fit for EDI to emerge within the nonprofit feedback practice work in the first three years.
- Feedback data suggest that there are different experiences by race, ethnicity, gender, and age.
- As the EDI lens goes from emergent to explicit, there are many opportunities to learn more.

Foundation Listening and Sharing

- Finding a main lever for foundation openness continues to be a challenge, but a greater emphasis on closed networks has helped increase uptake and target efforts.
- Lack of conceptual clarity and agreed upon terminology for the Listening and Sharing work has been a challenge.
- While initial grants did not result in much synergy, there is more momentum among the newer grantees.
- There are some examples of how the EDI lens has been brought to life through the focus on "listening" by foundations.
- Lack of championship and clear vision may have impeded progress in this area.

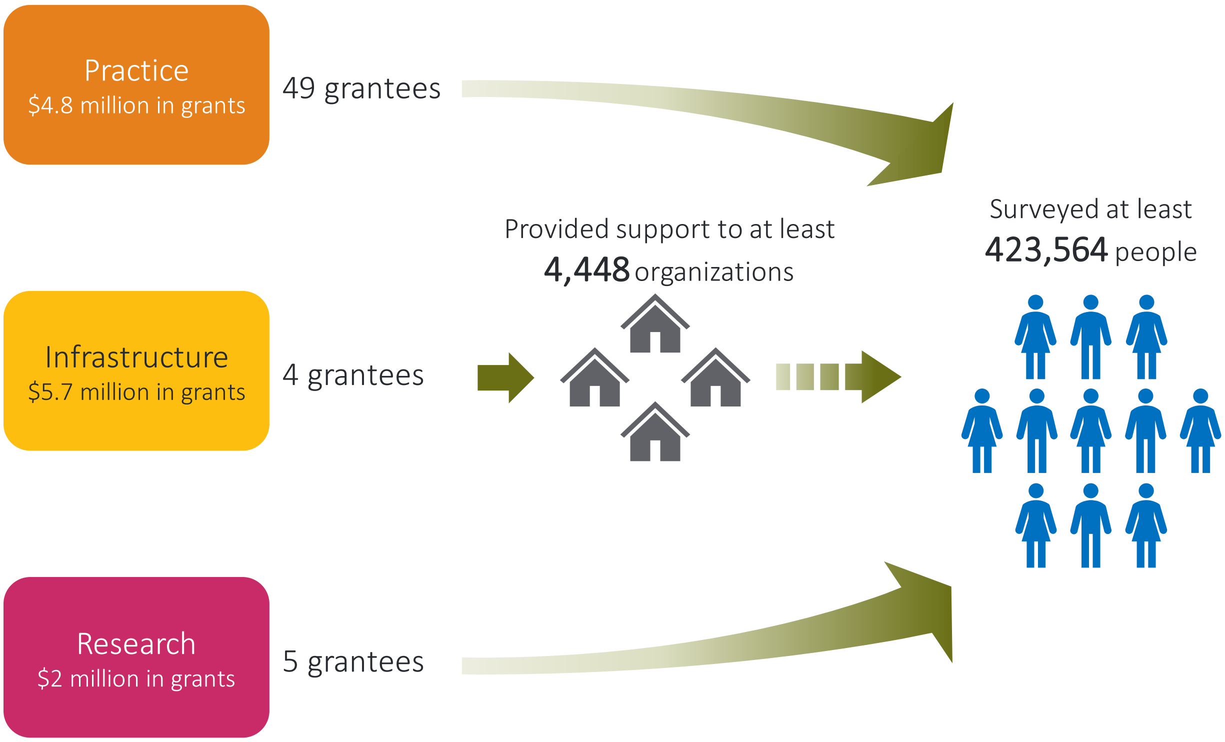
More details and supporting data on the achievements and lessons learned follow, along with our observations and considerations.

Feedback Practices

A cornerstone of Shared Insight's work has been to advance the practice of listening to, learning from, and acting on feedback from the people that nonprofits and foundations seek to help. Over the first three years, Shared Insight focused 80% of its resources in this area, including grant dollars and human capital. We reviewed a wealth of related data, including annual interviews with grantees, annual grant reports, surveys from Listen for Good nonprofits, interviews with a sample of Listen for Good grantees, and interviews with funders who co-funded Listen for Good nonprofits. This section includes outcomes and lessons associated with nonprofit feedback practice, foundations and feedback loops, and the feedback practice field. Figure 4 provides an overview of the reach from this area of work.

Since the work began, Shared Insight focused its feedback work on listening to the voices least heard. The voices least heard has been defined as, first, the people whom nonprofits and foundations seek to help, such as families accessing food pantries, youth attending afterschool enrichment programs, or recent immigrants using legal-aid support. Within this was an implicit focus on those in society who are typically least heard due to historic inequality and enduring structural barriers. Over time, Shared Insight has moved to explicitly articulate a priority for listening to participants and beneficiaries of marginalized groups, including people of color, people with disabilities, LGBTQ people, or people living in poverty.

Figure 4 | Shared Insight Reach 2014-2017[2]



Nonprofit Feedback Practice

The first component of Shared Insight's theory of change focused on making grants to organizations to advance the practice of nonprofits using feedback loops to listen to, learn from, and act on what they hear from the people they seek to serve.

In the first three years, $4.8 million in grants supported nonprofits through two primary avenues:

1. Direct support to nonprofits that wanted to create, expand, or strengthen their own organization's practices (i.e., CEO, LIFT, Habitat for Humanity)
2. Grants to nonprofits to implement the Listen for Good feedback approach, a structured offering including technical assistance. (46 nonprofit grantees)

[2] Data and sources for this information are in Appendix C. The dotted arrow between organizations and people is in place given that infrastructure grantees provide support to other organizations who collect feedback from the people they seek to help. Currently, we only have data of people surveyed as a result of infrastructure grantee support for two out of the four grantees.

Outcomes Among Nonprofits

Through this work, we are seeing the achievement of several key outcomes.

Nonprofits have improved their practice for collecting high-quality feedback.

All 49 nonprofits that have collected higher quality feedback as a result of Shared Insight's work have expressed ways in which they have **improved capabilities for doing this work internally**. Examples include improving staff skills to more effectively collect and analyze data, and building feedback into their organizational practices, processes, and staff roles. Beyond the technical aspects of collecting feedback, Practice and Listen for Good grantees have been flexible and adaptive to overcome challenges in capturing actionable feedback, such as figuring out how to reach different populations and developing questions and administration processes that increase response rates and limit courtesy bias. Across all participating nonprofits, we see **practices that reflect how Shared Insight has defined quality**, including engaging in feedback over time, reflecting on and using feedback, and attempting to communicate back what they are hearing. However, implementing a high-quality feedback practice is not without its challenges; all participating nonprofits have dealt with issues, ranging from staff time, ability to reach all populations served, and closing the loop (discussed later in this report).

Feedback is generating ideas for improvement, and nonprofits are taking action.

Collecting feedback from constituents is important, but listening and responding to it are critical. Across participating nonprofits, we find that most are taking action in this area. Both Practice grantees and Feeding America food banks and pantries in the research study **made changes to services in response to feedback**. For example, Habitat for Humanity used feedback to support the co-creation of neighborhood projects and strategies. Habitat also saw actions taken by some of their on-the-ground partners. In one community, local partners have begun paying community members as experts on community issues and working with them to address a public transportation issue that was raised.

Among 2016 Listen for Good grantees, after 12 months, 56% reported making a change and between 60% and 79% of agency leaders made or planned to make changes to things like operations, staff-client interactions, program offering, or new services. When talking with 15 Listen for Good grantees, the seven organizations that were identified as leaders all mentioned using data to make changes. This is in contrast to those that were lagging in implementation, only one of whom cited a change.

Nonprofits are changing in ways that support ongoing feedback practice.

The original Practice grantees came to this work with a high level of commitment and intentionality, and all have **maintained and built upon that commitment** over time. For example, LIFT elevated feedback as part of their organizational scorecard that the board, senior leaders, heads of programs, and regional offices see on a regular basis to keep integrating members' voices into their work. CEO also included feedback in their performance measurement work. Habitat for Humanity spoke to the need to be willing to slow down to listen well; a cultural shift is required to go from a mindset of getting projects completed quickly to a mindset of slowing down, authentically listening, and being in dialogue with the community.

Similar sentiments have been expressed by Listen for Good grantees in the survey and through interviews, including 79% of Listen for Good agency leaders who chose "Increased focus on clients" as a benefit of engagement in the grant, and 72% who cited "Greater responsiveness to constituent's needs" as another benefit. The nonprofits we interviewed that are leaders in Listen for Good implementation spoke to **positive organizational culture changes**, including staff belief that feedback is "expected," "part of the workflow", "a best practice," and "good for morale, organizationally, to know we're on the right track." While not explicitly called out as a desired outcome in either the original theory of change or in the outcomes expected from Listen for Good, this theme of maintaining or building an organizational culture that supports feedback has held up over time across different grantees and feedback methods.

One slight shift in what we've been hearing about organizational culture over time is greater acknowledgement of the **importance of having buy-in from all levels of staff**, not just the leadership level. From the beginning, leadership buy-in was seen as an important element of successful adoption and implementation of feedback in a nonprofit. Practice grantees spoke to how they engaged staff around question design and thinking through implementation logistics, as well as how it gets built into daily processes. But after one year of work, some Listen for Good grantees shared in our survey that it was hard to close the loop with clients before building buy-in from staff, and that they struggled with balancing using feedback and other organizational priorities related to marketing or communications. Across both grantee groups, broader buy-in seems critical for many aspects of an organization's feedback practice, including successful implementation, the ability to make changes based on feedback, closing the loop with those providing the feedback, and sustaining the practice over time.

Key Lessons/Observations of Nonprofit Feedback Practice

When looking across the Practice efforts and over time, we found some key lessons and observations for the core funders.

Higher quality feedback practice is both possible and a good fit with the ethos of the US nonprofit sector, especially those directly serving their constituents.

It may seem like a straightforward proposition, but there was no guarantee at the start of the collaborative that there would be enthusiasm and uptake around higher quality feedback practices. While the baseline snapshot found that the majority of nonprofits listened to their constituents, most feedback was unsystematic, anecdotal, and ad hoc. The degree to which all engaged grantees are collecting, analyzing, and using feedback and attempting to close the loop **demonstrates the potential for greater uptake and use in the sector.**

Additionally, most participating nonprofits currently express **high levels of commitment going forward**. While a small number of Listen for Good grantees plan to decrease their survey frequency, all plan to continue their feedback work and more than half plan to increase their efforts. More will be known in the next few months about their intentions to sustain their feedback practices as they wrap up their two-year grants. We plan to follow up with at least a subset of grantees to see what is actually sustained over time.

The Feedback Practice approach has evolved while still maintaining synergy and cohesion over time.

In the first round of grantmaking that began in January 2015, core funders prioritized grants to those organizations that had the most rigorous feedback approaches, national presence, and potential for expanding the work across their organizations, with the belief that they would be compelling models for the larger field. This approach also built on the assumption that some examples of strong feedback practices already existed and could be expanded with additional financial resources.

A little more than a year later, Shared Insight launched an updated approach, Listen for Good, to expand the practice of high-quality feedback loops. Rather than supporting many different existing models on many different platforms, they sought to launch a tool that could be used on one platform across multiple types of customer-facing nonprofits. Shared Insight explored a hypothesis that more nonprofits could collect higher quality feedback and put it to use through implementation of a simple tool with six core questions, featuring the Net Promoter System (NPS) on the ubiquitous SurveyMonkey platform.

This shift demonstrates **an evolution in the underlying theory of this work**. While the original approach suggests that having strong examples of feedback loops in the field would generate dialogue and use by others, the updated Listen for Good approach suggests that: 1) there is value in the simplicity of one tool that can be benchmarked and widely deployed; 2) field-level capacity and system needs limit the broader adoption of high-quality feedback practices; and 3) the field may be more likely to go to scale with a system that works with many nonprofits rather than through proof points of a few.

In the end, it does seem that Shared Insight leveraged lessons learned from the more highly resourced original grants to successfully expand higher quality feedback at a greater scale and for a different cost structure. At the same time, **there is continued synergy** across the two areas of work, with some of the Technical Assistance providers for the expanded pool of Listen for Good grantees coming from organizations that were Practice grantees, and an organization like Feeding America participating both as a Practice Research grantee while also having members as part of Listen for Good. Additionally, conversation across bodies of work mean that Practice grantees have also experimented with the NPS. On the whole, **the work feels cohesive and additive over time**, with the additions and shifts building upon and bringing along the prior work rather than representing any major departures.

Work so far has likely stayed with early adopters and higher capacity nonprofits.

The original approach to prioritizing high capacity grants was appropriate for this starting effort, and Listen for Good expanded the pool of these organizations, but we heard from their co-funders that they typically nominated and supported nonprofits they believed to already be strong. While these early experiments are showing promise and providing useful lessons learned about successful feedback implementation, new challenges and lessons may arise as Shared Insight and Listen for Good continue to expand the pool of organizations engaging in this work, increasingly with fewer resources and more diffuse supports.

Closing the loop has been—and continues to be—the biggest challenge.

There is strong alignment across Practice and Listen for Good grantees that nonprofits see value in closing the loop as a key element for quality feedback practice. While most grantees report growth in this capacity, all grantees—leaders in Listen for Good, Practice grantees, and others—describe challenges in navigating the best ways to share back results, finding ways to turn around feedback more efficiently and meaningfully, and dealing with negative feedback or feedback that can't be acted on by the organization. Barriers described include issues around the resulting data from Listen for Good (e.g., positive results with little or no variability, feedback that feels one-off or too individualistic), staff comfort, capacity or expertise around communicating back, and time. Figure 5 shows examples of some challenges.

Figure 5 | Challenges with Closing the Loop

[A barrier to expanding feedback loops is the] time required to meaningfully close the loop and the **demands this places on already overworked staff**. *Agency Leader*

We need to communicate more effectively. We have a TV in waiting area, but the info is scrolling too fast with too much information. *Agency Leader*

We know that centers that have very high results are more comfortable in those results and talking about them with staff and the girls. But those that have more challenging results are more concerned. **Some of the things that I hear are 'How can I communicate these results without affecting staff morale and get honest feedback from the clients?'** Right now that is our challenge and where we are focusing our attention. *Program Manager*

I feel that that things under my control/responsibility (e.g. survey administration and working with data) I have high ability. **The areas that are out of my responsibility (e.g. making any changes to operations or closing the loop) are more challenging to make happen.** *Program Manager*

By the time we had gotten the data back and did the analysis we had a new group of [clients] in front of us. We just didn't close the loop in the way was efficient or helpful in anyway. *Program Manager*

Closing the loop practices range from fairly low-level efforts (e.g., handouts, slides in client areas) to very intensive activities (e.g., follow-up focus groups, individual calls to follow up one-on-one with clients). More work to define and describe the range of possible activities and provide examples of how organizations have dealt with common barriers could be useful. The overall quality of implementation could be at risk as feedback practice continues to grow if this challenge isn't sufficiently addressed.

A side note

Lessons from non-direct service feedback work

While the early work of Shared Insight has largely focused on "customer-facing" nonprofits, there are a few examples from groups who serve in a intermediary role with constituents; given future interests, we lift up some lessons from those grants here. We found that some challenges seem universal, while others are particular to this kind of relationship with constituents.

Experimenting with *how* to collect feedback.

The action research grant to Chapin Hall/i.e. communications sought feedback from foster youth, especially those least heard, on results from a statewide survey of foster youth. The goal was to get youth's interpretation of data so that policy makers don't make assumptions of the findings around things like why youth may become parents at a young age, or how they get access to housing. The on-the-ground partner, i.e. communications, experimented with different ways to engage youth, including engaging other direct service organizations to encourage youth participation, social media, and creating "Youth Perspective Recruiters", youth who received a $100 stipend for recruiting at least five other youth to take the survey. Ultimately, they abandoned social media as a vehicle for getting participation and began to rely more on the peer-to-peer recruiter model. They found some resistance among nonprofit partners over concerns related to survey fatigue among the youth.

One Listen for Good grantee provides access to contraception as intermediaries between women and partner clinics. They have struggled more with getting data because of the lack of direct contact. They found that they needed to do more work internally, sharing back results with their staff and the partner clinics to build understanding, value for and buy-in into collecting feedback to help create greater buy-in for better response rates. They still struggle with receiving more critical feedback to act on and understanding change over time since there may only be one-time contact with those providing feedback.

Finding success despite challenges.

There is promise for the use of feedback in these kind of scenarios. The work with California foster youth did result in some specific uses in the policy world. For example, i.e. communication staff were able to take findings from the survey to the state's Child Welfare Council around homelessness and food insecurity based on learning more from foster youth about when, how and why these issues occur for them. These data have been able to highlight places where changes in policy around things like food benefits have been adopted, but the implementation and execution are not resulting in the desired outcomes. The Listen for Good nonprofit ultimately found new ways to engage with their partners and strengthen their work. While these experiences are the minority among Practice grantees, they could inform efforts to expand feedback work to advocacy groups or others that are less direct-service-oriented.

Foundations and Feedback Loops: Lessons So Far

In the original theory of change, grants were focused on the practice of feedback loops among both nonprofits and foundations, though the effort and work with foundations has been less prevalent. None of the original Practice grants ultimately included a focus on foundations or funders. A focus on funders and feedback loops primarily emerged through the co-funding requirement which was part of the design of Listen for Good. Twenty-eight funders directly engaged in feedback work as Listen for Good co-funders during the first three years.

Co-funders agree on the value of feedback for nonprofits, though there is variety in the motivation behind that value.

In our interviews with co-funders of Listen for Good grantees, we saw divergence in funders' motivations for participating. All saw the value for nonprofits, but some talked most about the importance of relationships and community engagement, and about the value of feedback as a way to achieve better client outcomes. Most funders spoke to only one facet or the other.

It's not yet clear what the ask or goal is around foundations and feedback practice work, but there is some evidence of supporting nonprofits leading to institutional changes for funders.

In our interviews with co-funders of 2016 Listen for Good grants, we heard several themes related to this area. Co-funders are strongly aligned in the belief that nonprofits should listen to their constituents, but are less clear on how feedback to nonprofits can inform their own work directly. Most co-funders view their grantees as their direct constituents, not the people their grantees seek to help. All were satisfied with their experience with Listen for Good, particularly the ease of grantmaking, but most didn't have a clear idea or expectation around what their participation should mean for their organization.

Despite this lack of clarity, co-funding Listen for Good prompted changes in a small number of the participating foundations we interviewed. Four funders made changes in their foundations to encourage more nonprofit listening (e.g., grant application questions about how they sought feedback on the design of the nonprofit's work) or seeking direct feedback on their own work.

While funders were explicitly included in the theory of change, this dynamic has been at play throughout the first three years. While the most focus and energy has gone to defining feedback practice work for nonprofits, it has been less clear what the goals are for how foundations can use "systems for hearing from people we seek to help." Should funders be listening and responding to their constituents (i.e., grantees)? Listening to their end beneficiaries through nonprofits? Supporting nonprofits to hear from and act on feedback from their constituents? This is a ripe area for further definition going forward. Related findings on efforts to encourage changes among foundations can be found in the section on Foundation Listening and Sharing.

Feedback Practice Field

When we considered the work and accomplishments of Shared Insight, we saw clear progress over the first three years in the degree to which it helped give shape and momentum to the concept of nonprofit feedback practice and perceptual feedback as a distinct concept.

Field-building wasn't an explicit strategy at the inception of Fund for Shared Insight; the original focus was oriented toward practice growth and improvement. However, it has become clear that many of the unique value-adds from Shared Insight's efforts—especially some of the non-grantmaking work—resulted in field changes. Shared Insight invested $7.7 million in this area as well as staff and core funder time. Additionally, several of the original outputs and outcomes sought (and achieved) for the Feedback Practice work focused on field-level change: growth and improvement in existing approaches to listening and learning from people we seek to help, and systems for hearing from the people we seek to help are used by innovators in nonprofits. Key efforts in support of this work included:

1) **Grants to groups that supported a feedback infrastructure** through resources, tools, platforms, and other strategies (Feedback Labs, Keystone Accountability, YouthTruth, GlobalGiving).

2) **Grants to organizations conducting research** including research to improve the quality of feedback loop practices (Chapin Hall/i.e. communications, Urban Institute/Feeding America) and research to understand the connection between feedback and outcomes (Innovations for Poverty Action, REDF/RTI).[3]

3) **Writing, publishing, and speaking** including articles, blogs, op-eds, pieces for the field (e.g., Perceptual Feedback piece by Threlfall Consulting, CEP research, Harder + Company data mining), and speaking engagements (including conferences, radio interviews, and foundation staff meeting presentations).

4) **Convenings** including 2015 grantee convening, Feedback/Listen for Good convening (2016), White House Workshop on Data-Driven Feedback Loops (2016), Feedback Labs' Feedback Summits (2016, 2017).

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[3] Center for Effective Philanthropy received a grant in the Research category in late 2016 and released a report in December 2017, titled, "Staying Connected: How Five Foundations Understand Those They Seek to Help." The timing of data collection and this report meant that we did not collect data from them on the impact of this release to include in this report, though it will be included in products later in 2018.

Output achievement is variable, and the long-term play around predictive research is still in process.

Through the support of Shared Insight, the infrastructure grantees:

- Directly supported feedback practice to 1,028 participating schools; 600 organizations that participated in convenings, trainings, and related services; and 19 nonprofit organizations that received technical and financial support.
- Received 162 public mentions, participated in 31 national and international convenings, spoke in 27 speaking engagements, developed seven field-facing reports, hosted two annual feedback conferences, and published a weekly blog series, a monthly informational primer series, and a newsletter.
- Developed a "Feedback Commons" with tutorials and support materials used by approximately 450 people.
- Conducted research contracts including Net Promoter Score experiments in two countries and a “Real Time adaptation for Data” project with USAID.

Three of the four grantees were able to largely meet the expected outputs they defined at the start of the grant. One struggled to meet targets and Shared Insight agreed to change the terms of the grant in the final year, allowing the grantee to use the remainder of the grant as general operating support.

The Research grants are still in process. The action research grants oriented toward improving the quality of feedback loop practices have been completed but results not disseminated. Shared Insight did not make grants to support research to connect feedback and outcomes until 2016 and 2017 and found it more difficult to find partners who understood and could align to the research questions. These research studies have been extended to account for longer than anticipated implementation timelines. Results will begin to be available later in 2018 and beyond. While Shared Insight included outputs associated with dissemination of results in the original theory of change, the collaborative also understood this to be a longer-term play.

Field-Level Outcomes

Below we describe some of the field-level outcomes we think Shared Insight has contributed to based on the data collected, including interviews with grantees and our annual media analysis.

Greater definition of perceptual feedback and aspects of quality.

The first RFP released by Shared Insight sought to build from the Center for Effective Philanthropy's finding that nonprofits collected and used beneficiary feedback but worried it wasn't as systematic or high-quality as it could be. The responses received reflected this, with a focus on collecting feedback that went beyond satisfaction, was collected on a regular basis, could ideally be analyzed against a comparative set, used a collaborative approach, and reflected a diverse set of voices. As the work continued, it was clear that while conceptually the grantees were on board, there wasn't always clarity among them—or among others in the field concerned with constituent feedback—about the basic question of what perceptual feedback was exactly. And while the infrastructure grantees were already advancing this kind of work before Shared Insight's foray into this space, their individual efforts had not resolved this question. It was also clear in 2016, during the process of identifying and finding a promising partner to engage in more research on the linkage between feedback and outcomes, that there was not a field-wide shared definition which all parties could clearly lean upon and reference.

The Technical Note, "Perceptual Feedback: What's It all about?" prepared by Threlfall Consulting for Shared Insight sought to answer this question, defining perceptual feedback as: the perspectives, feelings, and opinions an individual has about their experiences with an organization, product or service that are used to inform and improve the practice and decision-making of that organization. Grantees reported that over the course of their work they had to spend less time case-making and could shift their focus to how to do feedback well. Shared Insight also helped to further solidify a definition of what quality could look like, with the focus on feedback that was ongoing, systematic, and included closing the loop.

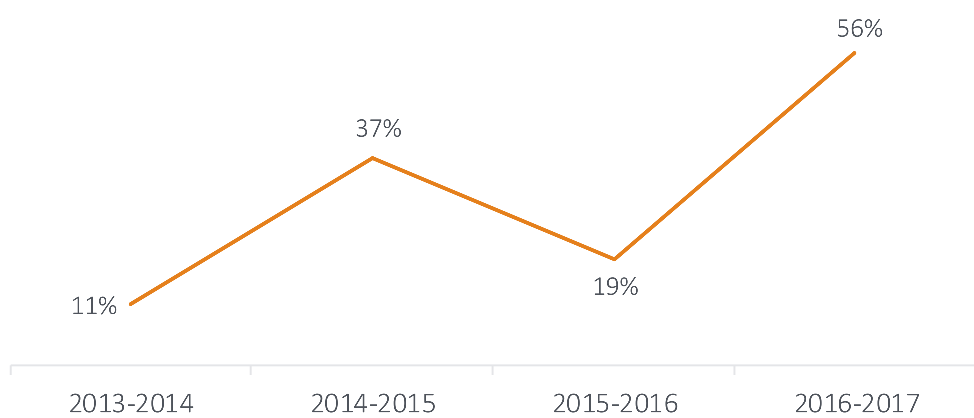
Increased demand for and sophistication of feedback loop supports.

Although the original RFP did not set up specific criteria or goals for proposals from infrastructure organizations for the field of feedback loops, a handful of such grants came forward. The funders saw these grants as central to developing and sustaining the field through the important and unique role that infrastructure plays. Two grants, Feedback Labs and Keystone Accountability, were funded under these auspices; for purposes of the evaluation, we also looked at YouthTruth and GlobalGiving as infrastructure grantees. All four grantees have experienced growth in uptake and sophistication of their services. In the first year, these grantees all spoke to momentum around the idea of feedback loops, but less demand around the actual implementation. One year later, grantees reported greater demand, including donor feedback participation, greater participation in events, and greater uptake for consulting and related services. The sense from the group was that the demand for implementation supports was growing and the conversations had shifted from making the case to more advanced work around "how."

Increased advocacy for and alignment to high-quality feedback in sector dialogue.

Dialogue in the sector about feedback grew when Shared Insight started and continued at a steady pace in blogs, periodicals, and reports over three years. While the volume has stayed fairly constant, the content of the conversation has shifted favorably, with more recent mentions advocating for the use of feedback (56%) compared to only 11% at baseline, as shown in figure 6.

Figure 6 | Percentage of Relevant Content Advocating for use of Feedback Loops Over Time

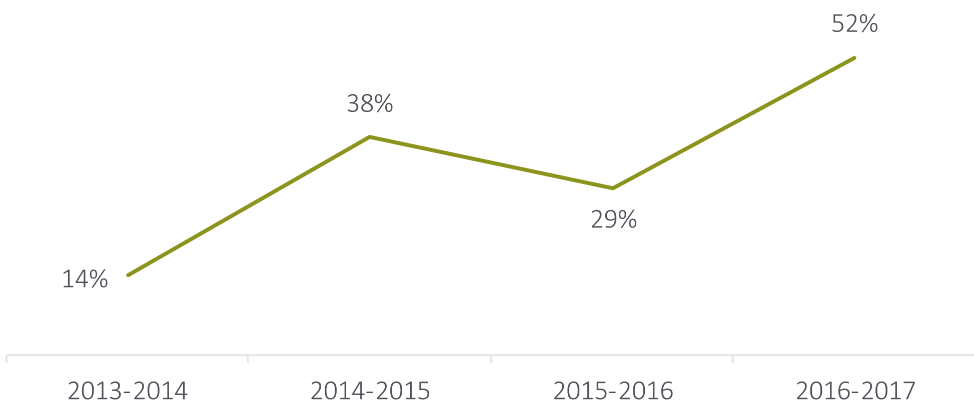


Source: ORS Impact Media Analysis

N: Baseline (105), year 1 (154), year 2 (147), year 3 (150). N varies according to relevant content available each year

Media analysis from 2014 through 2017 also showed substantial growth in the frequency with which relevant content in key sector media included aligned definitions around feedback practice, with 52% of content in 2016-2017 discussing feedback that was described as systematic and used, compared to only 14% at baseline, as shown in figure 7. Content not counted as aligned was either due to lack of clarity around frequency and closing the loop (24%) or only focused on one-time feedback or no reference to communicating back to those providing feedback (24%). This suggests that the non-aligned content is more due to lack of specificity rather than a counter-narrative about feedback loop approach or quality.

Figure 7 | Percentage of Relevant Content with Aligned Definitions of Feedback Over Time



Source: ORS Impact Media Analysis

N: Baseline (105), year 1 (154), year 2 (147), year 3 (150). N varies according to relevant content available each year.

Key Lessons/Observations from the Feedback Field

Without being explicitly called out as part of feedback work, infrastructure and field-building has been a large area of investment.

More grant dollars have gone toward infrastructure efforts than any other area of work, and has included non-monetary activities such as convenings and influence through speaking and writing. (Investments in Listen for Good supports and materials that will become publicly available are not counted in these figures but represent other field-oriented investments.) When considering the elements of a strong field,[4] as shown in Table 1, these would seem to cover a number of categories, especially related to shared identify, standards of practice, and creating a knowledge base:

Table 1 | Overlay of Shared Insight Work to Date with the Strong Field Framework
(▶▶: addressed by Shared Insight in some way)

Category	Components	Related Investments
Shared Identity	▶▶• Community aligned around a common purpose and set of core values	• Publishing/writing/convenings • Practice grantees, Listen for Good grantees
Standards of Practice	▶▶• Codification of standards of practice ▶▶• Exemplary models and resources (e.g., how-to guides) ▶▶• Available resources to support implementation (e.g., technical assistance)	• Listen for Good supports and TA • Infrastructure grants • Publishing/writing/convenings • Practice grantees, Action research grants
Knowledge Base	▶▶• Credible evidence that practice achieves desired outcomes ▶▶• Community of researchers to study and advance practice ▶▶• Vehicles to collect, analyze, debate, and disseminate knowledge	• Harder + Company data mining research • Publishing/writing/convenings • Research grants
Leadership and Grassroots Support	▶▶• Influential leaders and exemplary organizations across key segments of the field (e.g., practitioners, researchers, business leaders, policymakers) • Broad base of support from major constituencies	• Infrastructure grants • Publishing/writing/convenings • Practice grantees, Listen for Good grantees
Funding and Supporting Policy	• Enabling policy environment that supports and encourages model practices • Organized funding streams from public, philanthropic, and corporate sources of support	• Co-funding strategy in Listen for Good touches on this for philanthropic and corporate sources, but does not address an "organized funding stream"

[4] The Strong Field Framework: A Guide and Toolkit for Funders and Nonprofits Committed to Large Scale Impact. The Bridgespan Group for The James Irvine Foundation. June 2009.

Action research grants yielded less unique value in this timeframe.

The two 2015 Practice Research grants both fell within the category of "research studies…that identify how feedback data may be best collected." Urban Institute, in partnership with Feeding America, created and implemented a participatory action research process to test feedback across multiple food pantries under the umbrella of two food banks. As noted previously, Chapin Hall and i.e. communications partnered to collect different, additional data from foster youth to better understand and identify possible policy solutions from the CalYouth survey findings. Both projects were successfully completed and have yielded lessons learned, and, for Feeding America, led to broader organizational commitment as evidenced by its work to now think about how to roll feedback out across their network of 200 food banks. It is less clear, however, that these projects have added tremendous value to how the practice of nonprofit feedback work is happening beyond the investments made in the Practice grantees. It may be that the speed and intensity with which the feedback work was iterated on and expanded was a poor match for three-year grants that moved forward with more structured plans and timelines. It also seems that Practice grantees themselves took on a more rigorous approach than could have been originally expected, with strong attentiveness to response rates, differences in different methods or offices, etc. From a field-building perspective, however, having "credible evidence" and "vehicles to collect, analyze, debate, and disseminate knowledge" as part of a field's knowledge base may mean these investments yield a different kind of value in the long run.

As noted previously, the other research grants to Innovations for Poverty Action and REDF/RTI are still underway; their contribution cannot be assessed at this time.

Several grantees shifted from tools and platforms to experimenting with other ways to support nonprofit practice.

There have been a number of efforts to incentivize or bolster nonprofit feedback practice through platforms and tool development, most of which have had mixed to no impact to date. Feedback Labs originally proposed creating a toolkit but realized as the grant went on that their strength was not in building tools but rather in creating convenings and developing a movement around feedback through activities like convenings, blogs, Labstorms. Keystone Accountability originally sought support for the development and promotion of an online Feedback Commons; since engagement was low, they realized that many organizations still required hands-on guidance to implement feedback loops. GlobalGiving sought to incentivize collection of feedback by its nonprofit partners and build demand for donors to make giving decisions around those who conduct feedback. They are seeing some uptake in using tools and resources around learning and feedback among their partner organizations, and they experimented with a badge approach for nonprofit profiles to attract greater donations; however, the concept is still believed to be complicated for their donors. Across the grants, higher touch, consultative supports still seem to be the most successful across different infrastructure organizations and models.

Feedback Practice and Equity, Diversity, and Inclusion

Because equity, diversity, and inclusion (EDI) was not explicitly a part of the original theory of change, EDI questions were not an explicit area of inquiry in the first three years. However, given its growing importance as a core value and set of operating principles, we share some observations of the ways in which the EDI lens has emerged within the Feedback work, and could inform all of the work going forward in a more explicit and intentional way.[5]

Shared Insight has thus far used the following definitions with the support of Open Source Leadership Strategies to distinguish between equity, diversity, and inclusion.

Term/Lens	This lens tends to focus attention on…	Operating with this lens tends to drive toward certain kinds of change…
Diversity	Composition: The mix of attributes of a group; some differences matter more than others Guiding Question: Who is present?	Representation: Ensuring that population demographics are appropriately reflected in participation, leadership, decision making, etc.
Inclusion	Relationships & Experience: What happens with the diversity of a group, how differences are tapped and integrated Guiding Question: Who is participating?	Engagement: Considering ways to make diverse participants feel welcome and able to contribute
Equity	Outcomes & Root Structures: How power relationships and systems shape life outcomes for group members, with a particular concern for patterns of disparity and disproportionality Guiding Question: How is power operating?	Ownership: Shifting systems and conditions so those who have been excluded or oppressed benefit and become empowered agents of the change they seek

[5] DEI is the common term, and FSI uses it synonymously with EDI, but chooses EDI intentionally to lead with equity.

Key Observations/Takeaways of Feedback Practice and EDI

There has been a more natural fit for EDI to emerge within the nonprofit feedback practice work in the first three years.

Across the feedback practice work, we found more examples of how EDI has been operationalized related to the work of and with nonprofits than in other aspects of Shared Insight's work. As noted at the start of the Feedback section, the focus on "voices least heard" has naturally lent itself to focusing on grantees serving a diverse set of clients. Listen for Good specifically sought applications from "diverse customer-facing nonprofits", with diversity meaning "nonprofits of many budget sizes, focus areas, and geographies." We know from the Harder + Company data mining project that these nonprofits are reaching a diverse set of constituents; at the time of the analysis, Listen for Good nonprofits had collected feedback from 29,458 constituents, with the majority coming from Hispanic or Latino (41%) and Black or African American (22%) respondents. A particular set of targets around constituent characteristics of the organizations selected or their constituents was not explicitly part of the criteria; there has been discussion over time about the degree to which criteria around organizational capacity and size could exclude some nonprofits that may serve historically marginalized groups.

Further, we know less about the practices of these nonprofits specifically around EDI: how they ensure diverse participation among their constituents, for example, ways in which they analyze the data with an EDI lens, or whether and how they take an equity lens to the findings and resulting decisions. We have some examples of ways that nonprofits are including their constituents in the review and interpretation of the results. We also know that nonprofits are often taking action on what they hear, which certainly provides the opportunity for greater inclusion and equity at an organizational level.

Without the benefit of explicit inquiry, there is less evidence of ways in which EDI has shown up in other areas of the Feedback work that aren't direct-service focused, such as changes in philanthropy and the feedback field.

Feedback data suggest that there are different experiences by race, ethnicity, gender, and age.

The Harder + Company analysis of the full Listen for Good dataset lifted up a finding that White respondents rated survey items the highest, with Black or African American, Multiracial/Multiethnic, Other and Native Hawaiian or Pacific Islanders consistently rating survey items the lowest. While this is consistent with some research around the NPS in the corporate world, it does it does lift up important concerns about inclusion and equity that should be further explored not only to help those individual organizations improve their services for diverse populations, but for the sector overall to reflect on and change larger systems that produce these disparities."

As the EDI lens goes from emergent to explicit, there are many opportunities to learn more.

Going forward, new and different questions could be addressed through the evaluation that could shed light on how EDI is supported through the different initiatives and efforts within Shared Insight's ongoing feedback work. For example, the evaluation could explore things like: to what degree do nonprofits collecting feedback attend to inclusion in their data collection, and inclusion and equity in analysis/sensemaking and decisions around how to use feedback? To what degree do grantees experience the TA as inclusive and supporting them in thinking about equity implications? How do the people "least heard" experience the feedback process, and to what degree is it culturally relevant to them? To what degree are field supports addressing/supporting EDI through their work? This is a ripe area for ongoing exploration, for Shared Insight but also for the feedback field more generally.

Foundation Listening & Sharing

Increasing the extent to which foundations listen to others—especially the people they seek to help; respond to their expressed interests; and usefully share what they are doing, how they do it, and what they are learning is how Shared Insight believes philanthropy will increase effectiveness. Over the first three years, Shared Insight focused 20% of its resources in this area, making 12 grants for a total of $3.42 million.

Evolution of the Work

This area of work has evolved over the past three years from being referred to as "Support" in the first theory of change to "Openness to Foundation Listening and Sharing." Conceptualizing and funding this work has had a rockier path. To give context to the results and lessons learned described further in this report, we first capture some of the history around this body of work.

“Openness” had a less strong start.

The original RFP for what was originally termed the “Openness” or “Support” area of work presumed that work among philanthropic infrastructure organizations to increase openness in service of effectiveness could be strengthened, expanded, innovated, or evaluated. In the end, only five of the 30 submissions were accepted, and several of those proposed new work or efforts that began with the grant receipt. Two of the five grants were only supported for one year, and the remaining three did not result in synergistic effects. While reflecting on the theory of change in March 2016, core funders noted that the area of work was “hard to describe,” “much more nascent than expected,” and “isn’t easy.”

Despite focused effort, no breakthrough ideas were pursued.

Efforts by a sub-committee to talk with both funded and unfunded infrastructure groups and identify promising opportunities and new ways to better articulate what Shared Insight hoped to support did not result in any new initiatives or breakthrough thinking. Interestingly, core funder conversations in November 2015 and December 2016 floated non-grantmaking ideas, including creating a Community of Practice, hosting an “Openness Summit,” or launching a campaign approach. In the end, however, an open RFP was launched, resulting in a round of 10 two-year grants in July 2016. Some regret was expressed that the sub-committee had not asked, “What would it take to improve openness among philanthropy?” as a way to identify a more transformative approach.

20% allocation meant balancing expectations with the planned level of effort.

While it is easy to want to compare the Foundation Listening and Sharing work directly with the Feedback work, Shared Insight never intended equal levels of effort. From the beginning, Shared Insight designed their strategy and theory of change with 80% of dollars and effort going toward Feedback Practice and Research, and 20% going toward Foundation Listening and Sharing.

Foundation Listening and Sharing Results

Unlike in the Feedback area, the evaluation has not had a specific area of inquiry or deep dive into the data we collected directly from those working to change their own foundation’s practices. In addition, a large proportion of the funded activities are still in process, and more data on those lessons and their achievements will be available later in 2018. Our observations in this section, therefore, are based on grant reports, grantee interviews, a review of meeting notes and materials, conversations with core funders, and our own observations.

Thus far, the primary achievements in this area have been field-wide materials and products.

Five organizations were funded in 2015. From the original five grantees, the following have been created:

- **9 "Philanthropy Lessons" videos;** campaign website. Videos cumulatively received more than 36,000 views, though fewer than 20 additional stories were captured through the campaign site.
- **8 new "cause" write-ups** [Open Philanthropy Project, 2015].
- **1 set of principles** for Open Knowledge Sharing through IssueLab as well as blog posts, webinars, hosted conversations, conference presentations, a printed piece targeted to funders of research and evaluation, and a peer-reviewed article (2015).
- **1 report on Transparency** released by CEP. Dissemination included promoting findings through two speaking engagements, 10 blog posts, and 14 press mentions.
- **1 organized repository** of open licensing resources for foundations from Creative Commons.

We did not independently collect data to assess the impact of these grants, but the original grantees all described a crowded marketplace of ideas where the topic of openness didn't necessarily receive pushback, but it didn't receive expected uptake either. Examples of this include fewer downloads and webinar registrants, less uptake of interactive sides of online material, and fewer foundations adopting open knowledge practices.[6]

Only a small number of foundations are known to have changed practice as a result of Shared Insight's first round of funding. Creative Commons successfully supported three foundations to adopt new open licensing policies out of the 16 they sought to work with in 2015.[7] IssueLab ultimately decided to narrow their focus going forward on evaluative knowledge with a more targeted audience of evaluation and learning officers who have a clearer stake in knowledge sharing.

[6] The grant to the Open Philanthropy Project was not extended after the first year; ultimately, Shared Insight found little alignment between the project's approach to working in a transparent way with the desired results for the Listening and Sharing area, which focused on changing philanthropic practices more broadly.
[7] In January 2016, Creative Commons announced that The William and Flora Hewlett Foundation had awarded them an unrestricted multi-year grant for $10 million. Because of this support, Shared Insight did not re-fund Creative Commons.

It's too soon to know the outcomes of the currently funded work, but newer grantees are seeing more demand than their predecessors.

While the original Openness grantees described some lower uptake than they had expected or hoped for, the newer set of grantees describe strong demand and philosophical alignment with their participants. Ten grantees have achieved the following:

- **Reached 163 foundations** through 9 articles, 4 meetings, 2 webinars, 1 conference session, 1 workshop, 1 video conference, and 1 forum series (United Philanthropy Forum, FSG, NCFP and GEO).
- **Conducted research and data collection** through surveys, interviews, analysis of secondary data, and online discussions (United Philanthropy Forum, GuideStar, CEP, Women's Funding Network, and First Nations Development Institute).
- **Shared information more broadly** by publishing 7 individual blogs; participating in 6 public speaking engagements and 2 conference sessions; creating 1 blog series, 1 article series in Stanford Social Review, and 1 webinar; and participating in 1 interview and 1 member call (GEO members and Foundation Center).
- **Designed two online tools** and launched one beta site (GuideStar and Foundation Center).

When these grants are completed later in 2018, we will know more about their full set of activities and the outcomes they have achieved.

Key Lessons/Observations for Foundation Listening and Sharing

Finding a main lever for foundation openness continues to be a challenge, but a greater emphasis on closed networks has helped increase uptake and target efforts.

In the follow-up sub-committee work to identify a new and more effective way to tackle the area of openness, a group of co-funders held a series of conversations with sector-serving organizations (both funded and unfunded). A key takeaway from those conversations is that it is hard to define a main lever for openness given the various potential motivations and foundation organizational cultures. For the most part, the current group of openness grantees sees similar challenges in their work: family foundations are varied, few are already practicing openness, and participants can be at very different places.

Changes in who and what Shared Insight funded—closed networks, higher degrees of engagement—has likely helped to connect work to those with more similar cultures and motivations. Current grantees that leverage existing relationships and connectedness to their participants, such as the membership organizations, are reporting greater demand and more progress (e.g., Women's Funding Network, GEO, FSG's Collective Impact Forum, United Philanthropy Forum, Exponent Philanthropy, and National Center for Family Philanthropy [NCFP]). These grantees are also reporting that they have buy-in from their participants and that case-making is a lower need, except in some smaller foundations and family foundations for whom privacy concerns weigh differently among staff and family members.

Lack of conceptual clarity and agreed upon terminology for the Listening and Sharing work has been a challenge.

Grantees have used an array of terms for this work: grantee inclusion, transparency, understanding beneficiary needs, participatory grantmaking, funder/grantee relationships, and, on occasion, openness. In some ways, it's a strength for organizations not to be locked into terminology that is not their own or that may not resonate with their constituents. But the lack of consistency also has some limitations. Many newer grantees describe needing to do more upfront legwork around concepts and resources, things that may be less efficiently created and shared given the breadth of related but unique terminology. It's less clear how the efforts across the grants can build greater synergy or momentum since their relationships are more complex to describe and align. While this work differs in many ways from Feedback Practice, a fundamental part of having a strong field of work relies on a foundational shared identity of purpose and values, which has been a less strong element of this body of work.

While initial grants did not result in much synergy, there is more momentum among the newer grantees.

The original open RFP in 2014 resulted in a fragmented set of proposals. Shared Insight chose to fund the highest scoring proposals focused on practice change through various modes (e.g., research, videos, open licensing work) with the knowledge that "No one of these five grants alone would be likely to change the field, but taken together, we hope they become an influential constellation to help shift the culture and norms around foundation openness."[8] Unfortunately, despite participation in the grantee convening in 2016, no synergy naturally emerged across these pieces of funded work. The organizations did not describe a lot of new connectivity and did not share cohesive worldviews about the state of the sector relative to the area of work. However, that has organically changed among the newer set of grantees. Despite a lack of shared language and terminology, the grantees have self-organized to learn more about each other's work and consider how they might work as a group to develop shared principles, definitions, and a continuum of progress around openness. They see this work as slow moving and requiring a prolonged focus to achieve culture shifts.

[8] November 2014 meeting notes

There are some examples of how the EDI lens has been brought to life through the focus on "listening" by foundations.

Similar to the way in which a focus on "voices least heard" has the potential for transforming power relationships between nonprofits and those they serve toward greater inclusion and equity, so, too, does a focus on foundation listening and sharing. While the first round of grants in this area of work had no reference to EDI, the latest round included grants that were selected in part to reflect a growing commitment by Shared Insight to EDI and resulted in grants that are reaching foundations that are wrestling with EDI in their own work.

For example, the proposal from First Nations was one that warranted further discussion among the core funders of the set of eligible proposals to fund. The proposed research to better understand funding to Native communities clearly focused on addressing structural racism/bias rather than fitting squarely within the description of foundation openness as described in the RFP.[9] The funders moved forward on the grant because of the interesting potential for the intersection of openness with EDI issues.

Beyond the First Nations grant, there is evidence among some of the grantees working on convenings and trainings that grantees' efforts to support openness is aligning with the participating foundations' own work on EDI or community engagement. For example, two of the foundations participating in the Collective Impact Forum's Learning Lab are focusing their action learning projects explicitly on listening related to EDI work.

In speaking with all of the current grantees, most cited "DEI" when asked about new trends, issues or topics emerging in the nonprofit or social sector that were impacting their work. Some shared that connecting openness and DEI has not been straightforward or easy where others saw the relevance and implications for the way foundations practice openness.

Lack of championship and clear vision may have impeded progress in this area.

There is a robust—and crowded—marketplace of ideas around philanthropy, and many groups have been working on changes to the philanthropic sector for decades. While this is "well-rutted territory," and changing foundation practices and cultures, at scale, was always going to be a challenge, we think a few factors specific to the work of Shared Insight have had an effect on progress in this area.

First was the genesis of how openness came to be a part of Shared Insight's work. While there was energy and enthusiasm for the potentially transformative impact of feedback practices on the social sector, the inclusion of openness was more pragmatic and partly a nod to the fact that many of the funders likely to

[9] Though not an exhaustive list, the RFP specifically suggested activities such as: foundation dialogue about what does and doesn't work; engaging foundations around the use of feedback loops; and advancing the knowledge and practice of openness.

join the collaborative would need to use dollars meant to support the philanthropic sector more broadly. Second and related, this area of work has had individual core funders with specific interest, but not a high-level champion at the co-chair level. Finally, the first round of grant decisions did not benefit from the same amount of group discussion and vetting as those made for Practice and Research, which proved to be more contentious. While none of these factors meant the Foundation Listening & Sharing couldn't be successful, these dynamics may have contributed to its level of success compared to the feedback work.

Overall Lessons/ Observations

In addition to sharing the results and lessons learned in the different areas of Shared Insight's work over the past three years, we wanted to lift up a few other observations and considerations for the core funders as the work continues through 2020.

1 Shared Insight's unique contribution turned up the heat on a growing feedback field.

While the feedback field was more fledgling, it was not completely untilled ground. Shared Insight wisely brought existing leaders into the fold and invested in infrastructure early on. In addition, the strategic shift from Practice grants to Listen for Good to more rapidly and cost-effectively build momentum among nonprofits, while attending to convenings and publishing/writing/speaking, all came together to propel the field. **It's hard to imagine that feedback practice would be where it is today without the efforts of Shared Insight.**

Consideration: In the new theory of change, some areas of work will continue at a different place of maturity while other areas will be at an earlier stage. Are there ways of working and thinking that should evolve given the evolution of the work itself? Are there ways of working to hold onto and leverage areas that are still more innovative and experimental?

2 Funders consistently express value for listening to constituents, but it remains hard to find evidence of changes in foundation practices.

In 2016, the Center for Effective Philanthropy asked foundation CEOs how promising they believed 24 areas of practice were for increasing the impact of foundations overall to increase their impact; 69% said “seeking to learn from the experiences of those they are ultimately trying to help” holds “a lot of promise,” the highest percentage of any of the presented practices. Most of the 28 co-funders for Listen for Good joined because they believe feedback practices would be a benefit for the nonprofits they support. New core funders continue joining the collaborative. Closed network Foundation Listening and Sharing grantees report good interest and uptake in their supported offerings. **At a values and conceptual level, there seems to be no barrier to seeing more success in this area. Yet, few changes in foundation practices related to feedback or listening and sharing** are reported by co-funders, core funders, or sidecar funders. Some of this may be due to a lack of clarity in the desired change, and some may be due to over-ambition, where seeds for change are being planted through experimentation with new ideas and changing ideas of what could be possible.

Consideration: Is Shared Insight at a point where it could articulate a clearer set of hopes or ideas for how foundations could change in ways that would make them better aligned with the goal and vision of the collaborative? Are there different expectations for different types of connections (e.g., Listen for Good co-funders versus sidecar funders)? Is there a way to better leverage the potential influence of this group to promote a stronger vision or expectation of practice change among partners without scaring off other potential investors?

3 Synergy and connections between Feedback grantees helped accelerate the work.

The feedback area of work benefited from synergy in a variety of ways. From the beginning, some Practice grantees were already working with some Infrastructure grantees (e.g., LIFT and Keystone Accountability). Practice grantees naturally connected with one another more organically around how they were doing work, which may have been more logical given greater similarities across grantees in this body of work. Additionally, there has been good thought partnership across the infrastructure organizations and with Listen for Good, as evidenced by Keystone Accountability’s Constituent Voice model shown on the Feedback Labs website, and Valerie Threlfall seeking perspectives from Feedback Labs and Keystone Accountability for the Perceptual Feedback piece. Over time, the naturally occurring synergies were boosted through more intentional strategies, like the Feedback convening, which brought together Practice grantees, Research grantees, and Listen for Good grantees and co-funders. And Listen for Good 2016 cohort members are requesting more chances to learn from their peers. An organic and supported set of ways that organizations could learn from and build upon each other's work definitely helped advance feedback practice overall, and in ways that differed from the earlier set of grantees working on Openness. The original grantees seemed to have little overlap or points of commonality to build from, though this seems to be changing with the current set of grantees.

Consideration: What can be learned about how these synergies emerged, were supported, and were fostered to continue to strengthen the work? On the flip side, are there ways to ensure that the connections made in the first three years don't unintentionally hinder growth and inclusion of new potential leaders and players, given the bonds that have been formed and/or strengthened?

4 A focus on and explicit value for promoting Equity, Diversity, and Inclusion emerged and has grown since the start of Shared Insight; there's still opportunity for the work to more fully realize this value.

Relatively early on, the core funders around the Shared Insight table began broaching the topics of equity, diversity, and inclusion (EDI): what it meant for the different foundations around the table, and how it might become a more intentional part of the work of the collaborative over time. The core funders have taken some concrete steps for building EDI into their processes and practices, including hiring a consultant to help bring a more consistent EDI lens to the work beginning with baking EDI into the updated theory of change for 2017-2020, and documenting it as one of the core values of Shared Insight. As a partner at the table, the journey of Shared Insight is one in which we are an actor; that process including the journey around EDI, is being documented through the external case study. and through internal journaling.

From our vantage point reflecting on progress through the work of Shared Insight, we see evidence that some decisions around grants and internal processes have helped lay the groundwork for more intentionality and learning about how equity, diversity, and inclusion takes life in the work of grantees, though this has not been explicitly explored to date. We also see opportunity at this point in developing a field of feedback practice to more explicitly bake in the connections between this work and EDI, through the definitions of quality, the TA and supports developed, the research conducted, and the way organizations are encouraged to use feedback over time. Similarly, groups working with foundations would benefit from a clearer articulation of how to connect foundation listening to EDI.

Consideration: While there has been some evidence of the way a growing focus on EDI has shown up in the work, greater equity in the social sector will not happen by accident. As the work goes forward with a more explicit focus on EDI, it may be helpful to think more about how to develop shared analysis of equity, diversity, and inclusion, how to resolve the tensions between the tree lenses, to what degree EDI efforts are focused on racial equity, and to what degree the work could or should focus on root causes of institutionalized racism. Setting explicit targets could help Shared Insight hold itself accountable to operationalizing these lenses. Additionally, a more explicit learning focus on EDI in the evaluation could result in more data and insights to support this area of work and the broader field going forward.

5 Shared Insight is grappling with what 20% effort really means.

As mentioned previously, the work of Shared Insight was intentionally divided, with 80% of dollars and non-grant resources going to Feedback Practice and 20% going to Foundation Listening and Sharing. Grant dollars ended up around 24% for 2014-17 for the latter. While we did not rigorously assess the non-monetary inputs into Foundation Listening and Sharing, if we accounted for intellectual and human capital investments in Feedback Practice and this body of work, we suspect that percentage may not have held. Over time, we have observed both some tension around how to rate its level of progress and some tentativeness around how to advance this work given the level of investment.

The 20% area of work did not fully meet expectations and did not reach a transformative state like the 80% area. While it's not possible for the evaluation to disentangle whether lackluster support led to lackluster results or vice versa, it does raise questions about how to balance efforts across a portfolio approach going forward.

Consideration: The new theory of change similarly holds out an area for experimentation at roughly 20% effort and investment. Given the first three years, are there ways to think about how this is staffed, championed, or assessed? What is needed to have a portfolio approach so that the smaller proportion of work has the resources needed to be viable and appropriately impactful?

6 The right thing, the smart thing, the transformative thing?

Relatively early on, Feedback Labs advanced a saying about feedback, "The right thing, the smart thing and the feasible thing," which captures the inherent value in listening to constituents, the potential for listening to result in better outcomes, and the work to make it a practice that nonprofits could more easily pick up organizationally. As the work has gone on, **we are seeing increasing evidence that seeking feedback, hearing it, and responding to it can also be a transformative act, with the potential to upend traditional power dynamics and become a tool to advance inclusion and equity**. Even the new theory of change for Shared Insight has moved from a goal grounded in changing philanthropy to a more social justice minded goal of meeting the needs people and communities define for themselves. As we've heard from nonprofits, this orientation is generally well aligned with organizational values. At a foundation level, this could fly in the face of long-held norms and practices that still reflect a more traditional "charity" orientation, or even against the more unfortunate applications of a strategic philanthropy approach, where experts create and execute a top-down strategy behind closed doors.

Consideration: How much does Shared Insight want to potentially lean into this message around transformation and changing power dynamics? How does this fit into messaging to nonprofits? Philanthropy?

Looking Ahead

Shared Insight has a strong base to build from as it refines its theory of change and continues to support a more effective social sector. There is no doubt that Shared Insight has made an impact in its first three years, including meaningful changes in nonprofits' feedback practices, the use of feedback, creating fertile organizational ground for ongoing feedback collection and use, and a more developed field of feedback practice. There has been less traction and progress around changes for foundations, and it is too soon to fully understand the results from investments in Foundation Listening and Sharing.

After three years, new opportunities and challenges are on the horizon. Taking feedback practice to a broader scale and to non-direct service organizations will raise new challenges. Continuing to support change in foundations to listen and connect more meaningfully with their grantee partners and the people they seek to help lends itself to different approaches than those tried so far. And leaning into more of a focus around equity, diversity, and inclusion will surely also mean leaning into less well-charted and sometimes uncomfortable territory. This raises new questions about how to work, how to set criteria for RFPs and grants, what to fund, and where and how to spend time and capital so that Shared Insight's work can support more equitable outcomes and avoid recreating patterns of systemic oppression.

The original core funders started by signing on for three years of investment and time. Encouragingly, this report is not a closing coda. Those original investments yielded positive outcomes and progress; the next three years—with an expanded base of funders, an updated theory of change, and the lessons gained from first period—will surely yield even more.

Appendix A: Data Sources and Methodology

For this evaluation, ORS Impact primarily used three types of data:

1. Existing evaluation products produced by ORS Impact between 2015 and 2018. These included:
    a. Annual Media Analyses (2014-15, 2015-16, 2016-17)
    b. Annual Grantee Interview Themes (2015, 2016)
    c. Theory of Change: Progress and Lessons (March 2016)
    d. Fund for Shared Insight Theory of Change: Progress to Date (February 2017)
    e. Listen for Good Evaluation: Six-Month Survey Results (February 2017)
    f. Listen for Good Evaluation: Twelve-Month Results (November 2017)
    g. Listen for Good Co-Funders: One Year In (November 2017)
2. Primary data collection to augment existing sources:
    a. Grantee interviews: interviews with representatives from current grantees to reflect on progress and lessons learned.
    b. Interview with a sample of 2016 Listen for Good grantees: 60 minute interviews with staff from 15 organizations who represented a range of geographies, organization sizes, and levels of use of feedback data.
    c. Interviews with sidecar funders: 60 minute interviews with three of four sidecar funder representatives. One sidecar funder responded to questions via email.
3. Secondary data, including:
    a. Core Funder Meeting Materials and Meeting Notes
    b. Year in Numbers (2015, 2016, 2017)
    c. "Feedback from the People Served by Nonprofits and Foundations." Harder+Company. (November 2017)
    d. "Perceptual Feedback: What's it all about? Technical Note: Working Draft." Threlfall Consulting, for the Fund for Shared Insight. (November 2016)

See Table 1 for more details on which grantees were included in which data collection efforts.

Table 1| Core Grantee Available Data

Core Grantees	Fall 2015 Interview	Jan - 2016 Grant Report	Fall 2016 Interview	Jan - 2017 Grant Report	Fall 2017 Interview	Jan - 2018 Grant Report
Practice[1]						
Center for Employment Opportunities	X	X	X	X	X	X
Habitat for Humanity International	X	X	X	X	X	X
LIFT	X	X	X	X	X	X
Infrastructure						
YouthTruth	X	X	X	X	X	X
Feedback Labs	X	X	X	X	X	X
Global Giving	X	X	X	X	X	X
Keystone Accountability	X	X	X	X	X	X
Foundation Listening and Sharing						
Center for Effective Philanthropy	X	X	X	X		
Creative Commons	X	X		X		
Exponent Philanthropy	X	X	X	X		
Foundation Center	X	X	X	X		
GiveWell	X	X		X		
First Nations Development Institute				X		X
Forum of Regional Association of Grantmakers				X		
FSG				X		
Grantmakers for Effective Organizations				X		
GuideStar				X		
National Center for Family Philanthropy				X		
Women's Funding Network				X		
Research						
Chapin Hall/i.e. communications	X	X	X	X	X	
Innovations for Poverty Action			X	X	X	
Urban Institute/Feeding America	X	X	X	X	X	X
Center for Effective Philanthropy				X	X	X
REDF/RTI				X	X	

[1] *Southeast Council of Foundations and National Center for Civic Innovation were not included in data collection.

Analysis and Reporting Process

The primary analysis has been detailed and described in each of the individual evaluation products that were referenced. For this report, we looked across data sources in the key areas of work over time (i.e., Feedback Practice, Feedback Infrastructure, Feedback Research, and Foundation Opening and Sharing) to look for evolutions in thinking, evidence of outcomes achieved, and lessons that were learned across cohorts, sets of grantees, or types of efforts (e.g., Listen for Good and Practice grantees) over time. From this review, we identified an initial set of findings and lessons that were then further explored in the available data and secondary sources. Initial findings were shared with staff and co-chairs and further refined with feedback from the Evaluation Sub-Committee.

Strengths and limitations

All evaluation efforts balance tradeoffs between strengths and limitations related to data collection and analysis. Our primary purpose for this evaluative effort was to support learning about overall progress on outputs and outcomes, Shared Insight's contribution, and the broader context for work related to feedback practice and openness, with an eye toward providing data-informed insights that can be supportive of the ongoing work. Unlike in 2014, this evaluation was intended to delve deeply into what could be learned for those who have been closest to the supported work, endeavoring to wring deeper, more nuanced understanding from those in the field versus a broader scan to serve as a baseline. We believe the strengths of this product include:

- Many data points over time: for all areas of work, we were able to review and build upon reflections and results, often annually.
- Use of the Mintzberg strategy framework: by focusing on what has been versus purely assessing the status of the work against the original theory of change, we believe our analytic frame accurately reflected and accounted for the emergent nature of Shared Insight.
- Strength of individual data sources and places where triangulation was possible: The ability to compare Practice Grantees to Listen for Good grantees, for instance, gave us more confidence in some findings related to the outcomes for nonprofits and feedback practice. In addition, having multiple timepoints with a consistent approach for the annual media analysis gave us more confidence in our understanding of the changes in the sector dialogue over time.

Conversely, the primary limitation lies in the inability to triangulate and verify self-report data in many areas. For a number of work areas, we are limited to self-report data from grantees, with the exception of Listen for Good and the media analysis. While we have grantee staff perspectives, grantee reports, and data from the perspective of funders, we have not collected data to provide an external verification of their reports on outputs or outcomes.

One thing we see as a strength and limitation relates to our close-in partner role with Shared Insight. Being at the table and an observer over time gives us the ability to understand the data with a different depth of understanding than an outside, external evaluator could provide. While this means we can be more focused and pointed in our observations, there is also some risk that closeness also gives us different kinds of biases than would happen for someone with more distance. While this is a risk, we do present our findings as they emerged from the data, without a particular agenda, point of view, or incentive for any particular result.

Appendix B: Fund for Shared Insight Theory of Change

Fund for Shared Insight

Philanthropy.
Open for improvement.

Our Theory of Change 2016

INCREASING OPENNESS

Increase the extent to which foundations:

- **Listen to others**, especially the people we seek to help, and respond to their expressed interests
- **Usefully share** what they are doing, how they do it, and what they are learning
- **Model openness** in both sharing out what we do, how we work, and why we make the decisions we do and the lessons we have learned

FUNDING IN COLLABORATION

- **Develop strong collaborative relationships** based in trust, shared interests, collective learning, and strategy co-creation
- Encourage a **broad(er) set of funders** to engage in this collaboration and provide key support for strengthening the philanthropic sector

GOAL

Greater culture of openness in foundations characterized by both more sharing and listening

IMPACT

Philanthropy grows increasingly effective at contributing to social and environmental change

Approximately 80% of Grant Funds

Support collaborative approaches to hearing from the people we seek to help

Approximately 20% of Grant Funds

Support new or existing efforts to increase foundation openness in service of effectiveness

Collaborative approaches to hearing from the people we seek to help

Increase foundation openness

1	2	3
PRACTICE	**RESEARCH**	**FOUNDATION LISTENING & SHARING**
Advance the practice of using feedback loops to hear from the people we seek to help	Advance the research base to identify how feedback data may be best collected and whether there may be some perceptual and/or experience data that can serve as leading indicators of change	Support efforts to increase foundation openness in service of effectiveness

1 PRACTICE

Make grants to organizations to advance **PRACTICE** of nonprofits and foundations using feedback loops to listen to, learn from, and act on what we hear from the people we seek to help

OUTPUTS	SHORT-TERM OUTCOMES	MEDIUM-TERM OUTCOMES	LONG-TERM OUTCOMES
Growth and improvement in existing approaches, and new approaches to listening to and learning from the people we seek to help are piloted Nonprofits and funders collaborate on approaches to seeking and heeding feedback from people we seek to help Blogs, articles, presentations and other communications efforts	Systems for hearing from the people we seek to help are used by innovators in nonprofits AND staffed foundations Feedback loops from the people we seek to help generate ideas for improvement and course correction in piloted approaches Publication of early results of piloted approaches are distributed, consumed and debated in the sector Improved nonprofit practice for collecting high quality feedback More dialogue in the sector about the importance of hearing feedback from the people we seek to help and application (and limits) of collecting feedback into the normal course of business	High quality systems for collecting feedback from the people we seek to help are used by and acted on by early adopters (more than just a few) among nonprofits and funders	Systematic feedback from the people we seek to help provides valuable data and insight for consideration and informed action by nonprofits and funders Increased funding for the integration of high quality feedback loops from the people we seek to help in different contexts

2 RESEARCH

Make grants to advance RESEARCH BASE on integrating feedback from the people we seek to help such that the feedback can better serve funders and practitioners and serve as leading indicators of change

OUTPUTS	SHORT-TERM OUTCOMES	MEDIUM-TERM OUTCOMES	LONG-TERM OUTCOMES
X research studies will be conducted that identify how feedback data may be best collected X research studies will be conducted that investigate ways feedback from the people we seek to help can be linked to rigorous outcome measurement such that we can highlight perceptual data as a leading indicator in different contexts	Publication of early results of piloted approaches are distributed, consumed, and debated in the sector	Quality of feedback systems are improved based on research findings More dialogue in the sector about the importance of hearing feedback from the people we seek to help and application (and limits) of collecting feedback into the normal course of business	Systematic feedback from the people we seek to help provides valuable data and insight for consideration and informed action by nonprofits and funders Increased funding for the integration of high quality feedback loops from the people we seek to help in different contexts

3 FOUNDATION LISTENING & SHARING

Make grants to nonprofit organizations supporting the philanthropic infrastructure and that are aligned with our openness goals – can be new innovations / efforts or to support growth of existing efforts

OUTPUTS	SHORT-TERM OUTCOMES	MEDIUM-TERM OUTCOMES	LONG-TERM OUTCOMES
Funded organizations innovatively broaden and/or deepen their existing efforts for increasing one- and two-way openness in service of effectiveness	Increased visibility of the benefits of foundation openness Greater awareness about and prioritization of openness in foundations More systems and supports in service of foundation openness	Beginning to move toward new norms of openness in foundations in even more "sticky" ways including more innovative methods, more useful formats, and more use of shared work Increased sharing among foundations about lessons learned from successes and failures	Openness in foundations is rewarded and pursued proactively by foundations Nonprofits and foundations pay attention to what is being more openly shared Nonprofits and foundations draw upon the lessons of others to accelerate their journey to impact

CONTEXT AND ASSUMPTIONS

- There is a growing maturity in the constituent feedback field with a critical mass of experiments and higher profile organizations beginning to explore this issue in earnest
- Principles of human-centered design and "design thinking" are gaining momentum within the social sector
- There is an increased demand for accountability from clients (e.g. users of nonprofit programs)
- The infrastructure, technology and tools necessary to collect constituent feedback (e.g. SMS messaging) are increasingly available
- There are currently very few examples of independent funders engaged in actively listening to constituents in a rigorous or systematic way to inform their own work
- An increase in collaborative efforts across funders and nonprofits could significantly accelerate the field's progress

RISKS

- Philanthropy has historically resisted change
- Philanthropy has historically resisted efforts to incorporate constituent perspectives due to fear about hearing what constituents have to say about the foundation's work and an ongoing resistance to openly examine failures and missed opportunities
- The value proposition for foundations learning from constituent feedback is in formation and uncharted territory
- There are few examples of successful nonprofit business models in place related to constituent feedback
- Philanthropic infrastructure organizations may see this as a competing effort that diverts resources rather than adds to the pie

Source: Valerie Threlfall Consulting. "Landscape Review of the Beneficiary Feedback Field." December 8, 2013.
Note: Ten to fifteen years ago, there were relatively think charitable sector infrastructure organizations and many funders. Today, there are many infrastructure organizations (e.g. philanthropy affinity groups) and fewer funders funding infrastructure organizations

Appendix C: Shared Insight Reach Data 2015-2017

Table 1| People who provided feedback and organizations supported in collecting feedback by Shared Insight grantees 2015 – 2017.

Grantee	People	Organizations	Notes	Source	Timeframe
Listen for Good	29,458			Harder Co. Analysis	2016-2017
LIFT	11,868			Organization Staff	
Habitat for Humanity International	1,657			Organization Staff	2015-2017
CEO	5,102		10,894 surveys sent * 46.84% response rate	Jan 2018 Grant Report	2015-2017
Urban Institute	4,229			Jan 2018 Grant Report	2015-2017
REDF		21		Jan 2017 Grant Report	2016-2017
Chapin Hall	395			Core funder write-ups	2015-2017
IPA	8,861	5		Core funder write-ups	2016-2017
Youth Truth	338,213	1,028	2015, 2016, 2017 schools + Bay area Initiative schools	Organization Staff/Jan 2018 Grant Report	2015-2017
Feedback Labs		415		Jan 2018 Grant Report	2015-2017
Keystone		450		Jan 2018 Grant Report	2015-2017
Global Giving	23,781	2,529	2,529 organizations (53.1%) have used effectiveness dashboard tools	Core funder write-ups/Jan 2018 Grant Report	2015-2017
Total	**423,564**	**4,448**			

ORSIMPACT