FUND FOR SHARED INSIGHT

Accomplishments & Lessons Learned

2017-2020

ORSIMPACT

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Missions Accomplished

1100 Olive Way, Suite 1350 | Seattle, WA

206-728-0474 | ors@orsimpact.com

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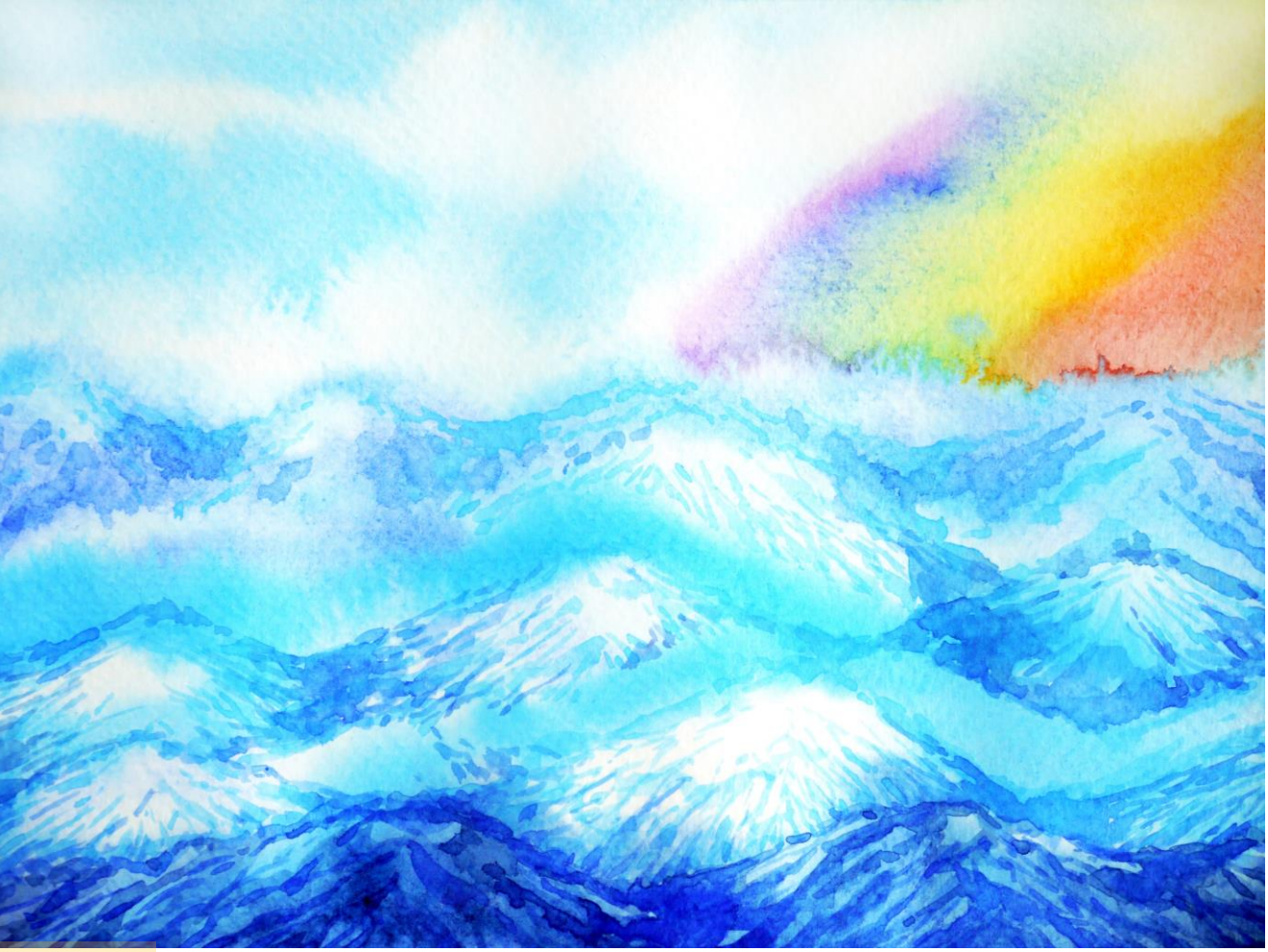


Introduction

Fund for Shared Insight is a national funder collaborative working to improve philanthropy, informed by insights from the people they serve. Shared Insight emerged from the belief that funders and the organizations they support can be more effective and do more good in the world if they are open to systematically listening to, and acting on, feedback from the people and communities at the heart of their work.

Shared insight launched in 2014. Core funders typically sign on for three-year commitments; thus, six years in, Shared Insight asked us, as their evaluation partner, to take stock of what has been

accomplished and learned from their efforts, including work that has continued and evolved or been added since the first three-year lookback.[1]

Originally, this reflection work was planned for July 2020, when the three-year commitments that began in 2017 came to an end and new commitments began. However, we altered our plans due to the upheavals of shelter-in-place orders and other impacts and restrictions of the COVID-19 pandemic, alongside the nationwide uprising and reckoning for racial justice. This meant waiting to ask for people's time and reflections until after the most urgent responses to these crises took place.

As the evaluation partner to Shared Insight, ORS Impact has sought to glean and synthesize what we have helped gather over the past three years, with some small additional data sources, and reflect back what we can say across the theory of change at this moment in time.[2] Our reflections are likely incomplete, and lack a full assessment of understanding the broader impact of Shared Insight's efforts in the sector. Additionally, we take seriously the call across all areas of work, and in the sector writ large, to apply a critical lens around racial equity, eschew false ideas of our ability to be neutral purveyors of information, and lift up considerations and thoughts that go beyond those that can be data-based.

Our hope is that this higher-level reflection and set of questions and wonderings can provide useful fodder as Shared Insight continues this work through 2023, both to consider how to apply these lessons going forward, and to raise up new questions that we can help explore and interrogate.

[1] We conducted our first three-year lookback for Phase 1, 2014-2017 (https://d35kre7me4s5s.cloudfront.net/wp-content/uploads/2018/04/03194118/ORS-Impact-Accomplishments-and-Lessons-Learned-from-the-first-three-years.pdf). Shared Insight is currently in its third three-year phase, 2020-2023.

[2] Information on the design, methods, strengths, and limitations can be found in Appendix A.

ACKNOWLEDGEMENTS

This work is made better for our partnership with different Shared Insight stakeholders, from engaging around the initial design, review and feedback on key informant interview sample decisions and interview protocol, and feedback on the draft report, including (in alphabetical order): Gita Gulati-Partee, Kim Amman Howard, Melinda Tuan, Meredith Blair Pearlman, Rick Moyers, Valerie Threlfall, Veronica Olazabal, and Yvonne Belanger. The Listen4Good team is a great partner in all of our efforts to evaluate their work with the nonprofits they support, and Michelle Mengel provided financial information to understand the grants and supports that are key inputs over time.

In addition to the support we receive within this project, there are a few others who continue to push our thinking, especially around evaluating with a deep foundation in and commitment to equity, including: Audrey Jordan, Jara Dean Coffey, and Nicole Robinson, to name a few people influencing our work and thinking.

We are grateful for the critical thinking, questions and supports; we also take full responsibility for the content of this report as evaluation partners to Shared Insight.

A NOTE ABOUT THE ARTIST

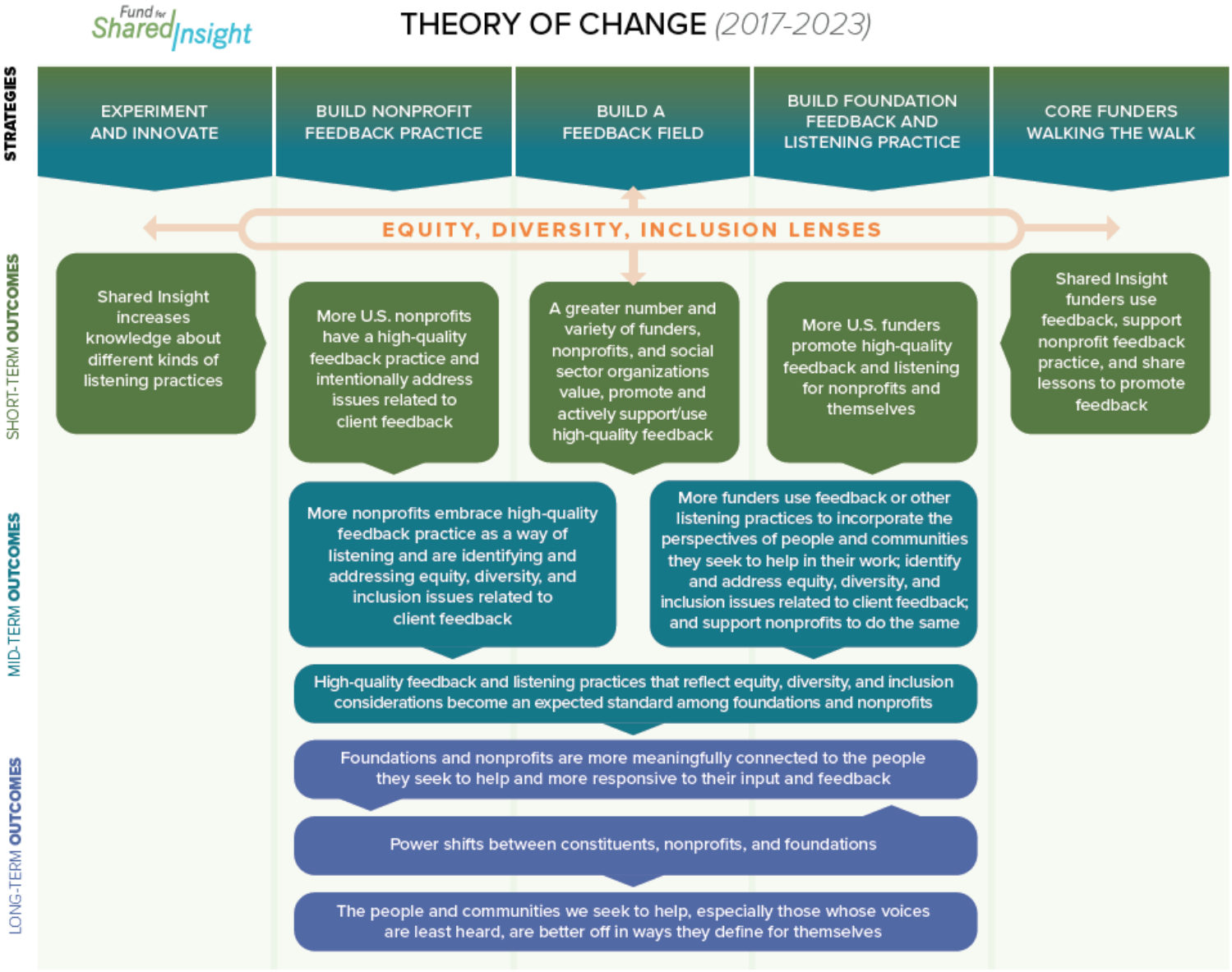
We decided to feature original artwork in this report to add a different feel and were drawn to this artist's use of rich colors and the texture of her paintings.

The artist is Benjavisa Ruangvaree. She is Thai and lives in Bangkok, where she paints with watercolor and is also a photographer. She says that the purpose of her art is to inspire people to live life peacefully and realize and preserve the beauty of the world. Her art can be found on many stock photo sites and other artist platforms.

Progress & Lessons

In 2018, Shared Insight developed an updated theory of change. For this part of the report, we look at the five focus areas of work and consider the following:

- What was the status of this work at the start of this three-year period?
- What have efforts looked like in the past three years, include grantmaking, other supports, and key outputs?
- What outcomes have been achieved?
- What lessons have been learned, and what are we, Shared Insight's evaluation partner, wondering at this time?



We have sought to build in questions about equity, diversity, and inclusion (EDI) throughout the outcomes and lessons. We also regularly reference the earlier evaluation products in case there is an area of interest for which the fuller set of original findings would be useful. By the very nature of taking this broad view, we won't capture every change or lesson that has occurred in this period. But we do hope this will help create some shared sense about where more or less progress has been made, and what could be built from or changed going forward.

TABLE 1

OVERVIEW OF ACCOMPLISHMENTS IN PHASE 2 2017-2020

	Phase 2: Key Figures	Summary of 2017-2020 Outcomes
Build NONPROFIT *Practice*	• $9,025,000 in grants • $5,284,844 in supports and infrastructure • 537 nonprofits directly supported	• L4G has had strong impacts on nonprofits' capacity to collect feedback, gain insights, take actions, and see organizational effects, while early data suggests that 1. A less custom and intense support can still reap good results, and 2. There is a good level of sustainability of feedback practices beyond the grant. • There has been some progress in how L4G has or can advance equity.
Build FOUNDATION *Practice*	• $1,935,000 raised through L4G • 72 new L4G co-funders • $135,260 invested in supports	• Some Listening and Sharing grants increased products, supports, and visibility of openness for foundations, and are likely still contributing to the current theory of change. • Philanthropy-serving organizations (PSOs) support, value, and promote sharing and listening practices.
Build a Feedback FIELD	• $2,745,000 in grants • At least $1,024,645 in supports	• Shared Insight continues to support field strengthening, particularly around focus, purpose, values, and standards of practice, while investments to build the knowledge base need more time to yield benefits. There is room to grow in advancing equity. • Specific infrastructure investments have strengthened and stabilized core feedback organizations.
EXPERIMENT *& Innovate*	• Identified two areas for experimentation • $121,594 for advocacy scan and staffing support	• Given the timelines of these efforts, it is too soon to have seen outcomes or have lessons.
Core FUNDERS *Walking the Walk*	• Phase 2 began with 7 core funders and grew to 13 • Added EDI consultant • Pivotal meeting in Montgomery, Alabama	• Most core funders are changing in ways aligned with their sphere of influence and context, and Shared Insight is contributing to those changes. • Shared Insight itself has made changes to better walk the walk, especially around EDI

Build **Nonprofit** Feedback Practice

PHASE 1 STATUS (2014-2017)

Over the first three years, Shared Insight focused 80% of its resources in this area, including grant dollars and human capital. In that time, 4,448 organizations[3] surveyed at least 423,564 people representing voices least heard across investments in nonprofits' feedback practices, infrastructure grants, and research projects. Through Shared Insight's signature Listen4Good (L4G) program, 46 nonprofits were directly supported as part of L4G's pilot launch in 2016. Among those, we found that nonprofits could increase their capacity for high-quality feedback and take action.

PHASE 2 EFFORTS (2017-20)

- $9,025,000 in grants (73% of grants in period)
- $5,284,844 in supports and infrastructure[4]
- 537 nonprofits directly supported

TABLE 2

KEY INVESTMENTS & SUPPORTS

For Build Nonprofit Feedback Practice

	2017-18	2018-19	2019-20
GRANTS	2016 cohort wraps up (46) 2017 L4G (66)	2018 Round 1 (46) 2018 Round 2 (58)	2017 L4G wraps up Online Beta (185) 2019 Round 2 (51)
SUPPORTS	Added 8 L4G coaches	New L4G staffing, including Data Analyst, 2 coaches, Community/Help Desk Manager Interactive web app launched	2 new coaches join

[3] At the time, nonprofits supported through research and field-building efforts were included in this number, so numbers included those collecting feedback through Global Giving, Keystone Accountability, research projects and more.

[4] Includes coaching, central staffing, web app, SurveyMonkey, 3rd party efforts including business plan, UX consulting, market research, data analysis for phase 2.

There were no major changes in strategy or approach, though there was meaningful experimentation around the amount of financial and customized support provided to organizations in an effort to enable greater reach and scale of impact for L4G.

As shown above, L4G grew and evolved during this period. The table below provides a summary of the cohorts over time and includes a comparison of the length of the engagement, grant amount and key components of the model received by participating nonprofits.

TABLE 3

COHORT SUMMARY

For L4G

	# of Grantees	Grant Terms	Grant Amount	Model
2016	46	24 months	$60,000	1:1 coaching and materials
2017	65	24 months	$45,000	1:1 coaching, more access to webinars, improved website and support materials, including a focus on sustaining feedback after the grant
2018 *Round 1*	46	18 months	$45,000	Similar to 2017 but a shorter grant period
2018 *Round 2*	58	Oct 2018 – June 2020*	$30,000	Access to web app beyond 1:1 coaching model with an assigned coach
2019 *Online Beta*	185	SurveyMonkey access for 18 months*	$5,000 (honorarium)	Primarily access to web app; extremely limited 1:1 assistance; no coaching
2019 *Round 2*	51	Jan 2020 – June 2021*	$30,000	Access to web app; 1:1 coaching model at key points with a dedicated coach

**Terms for this round were modified due to COVID-19.*

PHASE 2 OUTCOMES

- **Across three co-funded cohorts of nonprofit organizations[5], L4G has had strong impacts on nonprofits' capacity to collect feedback, gain insights, take actions, and see organizational effects.** As described in our March 2020 report,[6] the majority of nonprofits that completed L4G report that: the five steps of high-quality feedback have gone well or very well; they had gained insights about client needs, experiences, trouble spots, and/or differences across clients; they made changes to respond to feedback; and feedback changed other parts of their organization, such as culture, decision-making processes, interactions, values, or their perception of program effectiveness. We have some evidence that smaller organizations with more sustained interactions with clients gain more insights across different areas than others, but generally, the vast majority of participating nonprofits benefit from L4G. Additionally, L4G coaches shared that they find the L4G model supports organizations that have a range of starting capacities. Organizations with stronger starting capacity are strengthened by having a framework for staff who are already doing this work. For organizations with lower starting capacity, the framework helps them get started with feedback.

- **There has been some progress in how L4G has advanced or can further advance equity in organizations.** Over the last few years, the L4G team has built their own capacity and a more explicit focus around practices that promote greater EDI and shifts in power among participating nonprofits and their constituents. Among 84 organizations in the 2017 and 2018 co-funded/coached cohorts, most (80%) saw the connection between feedback and EDI by elevating clients' voice, supporting other internal EDI initiatives, and creating changes based on better understanding client needs and experiences. There is room to keep pushing for meaningful shifts in practices and power: less than half (40%) of these same L4G nonprofits planned or had made changes based on differences in responses from their clients. A relatively small proportion of nonprofits (24%) had started or planned to start stronger power-shifting approaches, such as engaging clients through more formal structures (advisory groups, committees, councils) or putting clients in new positions, such as staff, board members, ambassadors, or volunteers.

- **Early data suggests that a less custom and intense support system can still reap good results.** Our first look at L4G's Online Beta organizations that have received access to the interactive web app without commensurate coaching are still showing gains. While they seem to be moving through the steps of a high-quality feedback loop more slowly than those in co-funded cohorts, they are still achieving outcomes. Online Beta nonprofits are significantly increasing their capacity to collect feedback in the first nine months, though they aren't seeing quite as high a pre-post gain as the co-funded cohorts. A high

[5] Nonprofits receiving grants to participate in L4G are referred to as organizations in the rest of the report.
[6] The Listen4Good Journey So Far: Lessons and Findings from Three Complete Cohorts. March 2020. https://d35kre7me4s5s.cloudfront.net/wp-content/uploads/2020/04/07110557/The-L4G-Journey-So-Far-ORS-Impact-Final-3.23.20-002.pdf

proportion of nonprofits that make it through further steps of collecting, interpreting, and responding to feedback also report gaining useful insights, making changes based on those findings, and reporting impacts on their organization. Because we can't exclude those that had not reached these steps among the prior co-funded cohorts, it is difficult to know exactly how they are performing compared to the co-funded rounds that received greater levels of 1:1 support. However, we do know that meaningful levels of change are happening among those that persist.[7] We will also keep an eye on the degree to which we see comparable uptake of practices that better support EDI among this cohort, such as translating surveys, segmenting data, connecting with clients to understand results, and engaging with clients to identify solutions. At the 9-month mark, these tended to be areas with lower activity compared to other related items, though we will have more comparable data in the future.

- **Early signs point to a good level of sustainability of feedback practices beyond the grant.** At the 24-month mark, all responding organizations from co-funded cohorts in 2016, 2017 and 2018 plan to continue feedback post grant, and about half plan to *increase* the amount of feedback they collect. Additionally, data suggest that about half of L4G nonprofits also collect feedback in a broader set of ways by the end of their grant, including from other stakeholders (e.g., staff, board, volunteers), which could suggest a broader organizational shift toward embracing feedback as a practice. A year after their grant ended, we reached out to the original 46 nonprofits that participated in L4G. We could not re-connect with all 46, but we know from our outreach that at least two thirds continued collecting feedback, and only two had ended their feedback work.[8] Because it has been hard to know what comparative rates of sustained practice change to judge this result against, there is not a clear benchmark against which to decide if this is a good or bad result. Rates of sustained practice will be assessed again for 2017 and 2018 co-funded cohorts to better determine is this is a satisfactory result.

LEARNINGS and WONDERINGS

- **So far, L4G nonprofits have achieved strong outcomes, even with changes in the levels of financial and human supports provided**. While there are some differences between cohorts and some limits to our ability to directly compare all items, we have not yet found that changes to the amount of resources and amount of 1:1 feedback coaching is leading to different results for key expected outcomes, such as capacity to collect feedback, gain insights, or make changes based on what is learned. This is a promising finding in the quest for scaling a sustainable program model that can reach a much larger number of direct service nonprofits.

[7] L4G Online Beta Mid-Point Evaluation Results. This report has not been published yet, but is available upon request from ORS Impact.

[8] Sustainability of Feedback Practice: 2016 Listen4Good Cohort https://d35kre7me4s5s.cloudfront.net/wp-content/uploads/2019/07/30122415/ORS-Impact-Sustainability-of-Feedback-Practices-2016-L4G-Cohort-Final.pdf

- **Clients generally feel respected and happy to give feedback; clients were less clear on what was done with their feedback and what difference it can make.** For L4G results, we mostly rely on self-report data from organizational staff, but in 2019, ORS conducted eight focus groups across seven organizations with 83 clients who provided feedback through L4G. We heard from them that almost all, 92%, felt their voice mattered and that they saw how it mattered in terms of their interactions with staff and programs and services provided. At the same time, in four focus groups at least one individual was either unsure or felt their voice did not matter to the organization, and the vast majority of clients (90%) did not know what their organizations had learned from the surveys or what they planned to do with the feedback received. Some changes made by organizations may have been less visible, but clients also discussed the limitations of how much their voices could actually lead to change given the organization's decision-making structures. As participants in one focus group shared, an organization can *"listen to you but not actually hear you or take what you say seriously,"* and that feedback may be received differently depending on the day or the individual within the organization with whom they speak. In addition, clients from two focus groups raised questions about the extent to which their voices truly matter given the power dynamics related to their organization's structure. When we survey nonprofits about their practices, closing the loop continues to be the area that organizations report feeling they are doing least well, relative to other steps, and have the lowest self-rating of capacity to do so. In these organizations, staff reported closing the loop, but sharing and being heard can be challenging in both directions. Continuing to support this area seems an important way to ensure that the full benefits of feedback, especially as they relate to inclusion and equity, are experienced by organizations.

- **EDI is being built more explicitly into the model. As with all EDI work, the journey will continue.** The L4G feedback coaches and L4G Central team have taken explicit action to more deeply embed considerations of EDI into the work. Guides and resources are being updated to more explicitly focus on EDI, including ways that client voice can be elevated and amplified beyond the feedback survey. Coaches and staff are being trained on things like disrupting white dominant culture and how they can have conversations about differences, inclusion, equity and power with the organizations they work with, which hasn't always been something nonprofits expect to do as part of this work. To date, it has been easiest to have EDI conversations around technical aspects of the work, such as data analysis and data segmentation to explore any disparities based on demographic characteristics, like gender, race or ethnicity. The openness and success of those conversations also relate to the coached organization's work around race and equity.

When we interviewed, L4G coaches, they suggested the following changes in the future to support EDI work with nonprofits:

- **Have an explicit requirement** or expectation related to EDI for participating organizations to establish a different expectation

- Have more explicit messaging in application materials
- Focus more on organizations already engaged in EDI work or that are led by people of color
- More intentional involvement of organizational leadership

As these comments suggest, ensuring feedback is a tool for equity requires more than attention to differences in experiences and good data collection practices; it requires openness to listening to clients and a willingness to be wrong/imperfect, deal with conflict, and be uncomfortable—things that can bump up against deeply enmeshed elements of white dominant culture.[9] As the L4G effort grows and continues, ongoing attention to and competence in these topics may be important so that feedback practices don't unintentionally replicate traumatic and/or oppressive practices for those whose voices are already often least heard.

[9] Learn more from Tema Okun's work: https://www.dismantlingracism.org/uploads/4/3/5/7/43579015/okun_-_white_sup_culture.pdf

Build **Foundation** Feedback & Listening Practice

PHASE 1 STATUS (2014-2017)

The conceptualization and funding of this area of work had a rockier path, evolving from "Support" in the first theory of change to "Openness to Foundation Listening and Sharing." Additionally, this area of work was slated to have 20% of the funding and effort compared to nonprofit feedback practice. In addition to grantmaking, the co-funding strategy for L4G was intended to build support for and use of feedback data. The primary achievements in this area had been field-wide materials and products. For those engaged more directly as co-funders or through grantee activities, there were no strong barriers around the concept or values. Yet, few changes in foundation practices related to feedback or listening and sharing were reported by co-funders, core funders, or sidecar funders.

PHASE 2 EFFORTS (2017-2020)

This focus area had a bit of a fallow period, as staff and funders grappled with whether and how to address this part of the theory of change. Additional staff capacity and activity increased in the final year of this period, with new opportunities also emerging related to how funders were navigating and responding to the effects of the COVID-19 pandemic and uprisings over racial injustice and anti-Black racism.

- No grants, though 10 grantees bridged the two funding periods from 2016–2018; $1,250,000 was budgeted for work in 2020–2022, as part of Phase 3
- Raised $1,935,000 through Listen4Good co-funding
- $135,260 expended toward supports[10]
- Total unique co-funders in this period: 72 (2017 through 2019)
- Other funders engaged:
  - Pledge signers: 785
  - Total webinar participants: 380[11]

[10] This includes specific outreach and engagement staffing support but does not include other staff time that contributed to this area of work.
[11] Some participants might have participated in more than one webinar – these are not unique participants.

TABLE 4

KEY INVESTMENTS & SUPPORTS

For Build Foundation Feedback & Listening Practice

	2017-18	2018-19	2019-20
GRANTS	Listening and Sharing grants wrapped up	—None—	*Funder Toolkit RFP released for 2020-22 grantmaking*
SUPPORTS *and related efforts*	2017 L4G co-funders (32)	Irvine L4G Grantee Gathering (March) (44 attendees) New England Gathering (Barr Foundation & Boston Foundation, July 2019) 2018 Round 1 co-funders (23) 2018 Round 2 co-funders (27)[12]	Added staff capacity (9/19-7/20) COVID-19 pledge included feedback and listening Created and disseminated facilitated guide on listening for foundations and grantees: "Listening Together: A Discussion Guide for Funders and Nonprofits" (part I and part II discussions) Webinars on listening in April, May, June, and July 2020

PHASE 2 OUTCOMES

- **As in phase 1, some Listening and Sharing grants increased products, supports, and visibility of openness for foundations, though it was generally more challenging to change behaviors by the end of the grants.**[12] Based on data shared by grantees, these grants did lead to the achievement of outcomes in the theory of change: research products and publications associated with trainings/workshops/events led to visibility and increased awareness; IssueLab's evaluation vertical created a new support in service of openness; and most of the grants that focused on trainings/workshops/events increased prioritization of specific kinds of listening and sharing activities among target audiences. However, the RFP sought more specific changes in foundation practices, including sharing out and engaging in dialogue on their work, as well as more listening to, acting on, and closing the loop for feedback from grantees and people they seek to help. These kinds of changes were less evident as a result of these grants, in part because of the more diffuse nature of the work (e.g., research, evaluation vertical), and/or because of the time and/or resources with which to assess change (e.g., limited ability or resources to follow up with participants from a workshop, the timing of membership surveys that could show changes in practices). Some of the more intense efforts (i.e., those that lasted longer and/or had a greater level of individual engagement) resulted in changes in individual behaviors or organizational practices, often anecdotal, including:

[12] Foundation Listening and Sharing Grant: Results and Takeaways https://d35kre7me4s5s.cloudfront.net/wp-content/uploads/2018/09/14123750/ORS-Impact-2018-Foundation-Listening-and-Sharing-Interview-Report-9.13.18.pdf

- Eight foundations in the Action Learning Lab with the Collective Impact Forum reported that their organizations engaged in openness practices related to continuous learning, feedback loops, transparency, equity, and community engagement
- National Center for Family Philanthropy (NCFP) members who served on the taskforce are willing to be leaders in this area for their peers, champion the idea, and stay involved

- **Two years later, we have found that this body of grants is likely still contributing to the current theory of change.** While the current theory of change was being formulated as these grants came to an end, there are some through lines:
  - *Shared Insight increases knowledge about different kinds of listening practices*—While we have more anecdotal information than hard quantitative data, many grantees who had produced reports and other knowledge products shared that they still receive requests and see downloads of the content generated from these grants.
  - *A greater number and variety of funders, nonprofits, and social sector organizations value, promote, and actively support/use high-quality feedback*—There are a variety of indicators of change related to this outcome:
    - The First Nations research may be emblematic of one way that organizations valued high-quality feedback. Based on their initial work, interest grew in the sector to better listen and respond to the Native American community among funders. While it wasn't the typical model of a funder listening directly to those they seek to help, it does seem that shining a light on inequities and oversights at a sector level prompted meaningful attention to and reflection on the lack of connection between philanthropy and Native American communities and organizations.
    - GuideStar's work, in partnership with other feedback field leaders, to create and host an updated nonprofit feedback profile called How We Listen also shows another way the sector is showing value and support for feedback practice among nonprofits, with uptake from nearly 5,000 nonprofits.
    - Women's Funding Network continues to support their members in strengthening their practices, which already were largely based on listening and responding to community.

- **An outcome that seems to have been produced that isn't in the current theory of change is that philanthropy-serving organizations (PSOs) support, value, and promote sharing and listening practices among their stakeholders and the field. The** 2016 RFP acknowledged that "openness" had been hard to define and that Shared Insight did not have a clear theory of change for this body of work. The round of proposals was open to work that focused on sharing and listening in a variety of ways. Given

that, it's not surprising that the ongoing focus across organizations has been somewhat variable, ranging from funder transparency and sharing about internal practices and strategies, to promoting other sector practices that represent greater shifts in power, like trust-based philanthropy and participatory grantmaking. Additionally, efforts to continue promoting transparency and sharing have continued through Candid's ongoing promotion of GrantCraft resources, the Transparency Talks blog, and their leadership in related field efforts to promote openness. Finally, we heard of two cases where organizations had taken up practices themselves to listen and lift up the voices of those often least heard, including use of the Net Promoter Score (NPS) for their own work and the inclusion of intended beneficiaries in panels and programming.

TABLE 5

GRANT RESULTS OVER TIME

Listening & Sharing Overview

	At End of Grant	Two-Years Later	Other Longer-Term Benefits & Impacts
RESEARCH	3 research products* Increased visibility and awareness	**Increased coverage of native issues** in philanthropy/ increased agency among native-serving nonprofits, including Nonprofit Quarterly articles **Increased coverage of native community voice** through native authors speaking back to philanthropy and challenging their assumptions **Additional resources to support listening and responding** to community needs among women's funds, including participatory grantmaking **Attention to understanding beneficiaries** in the Grantee Perception Report questions and in other activities, such as the Council on Foundations COVID-10 Pledge	Center for Effective Philanthropy including beneficiaries in plenary and session panels at conferences
INFRA-STRUCTURE	IssueLab evaluation vertical created	**~5,000 nonprofits completing** How We Listen feedback profiles on GuideStar/Candid **Funder Evaluator Affinity Network (FEAN) sign on letter** calling for knowledge sharing activities released fall 2020	GuideStar using NPS; also using rapid prototyping approach for other areas
TRAININGS	Over 400 participated in trainings and events* Some individual or org change	**Some continuation/expansion of work beyond grant** for three of five grantees (e.g., extended work, more "road shows", etc.) **Continued focus on related topics** across all five organizations (i.e., largely more on transparency or listening than supporting high-quality feedback)	Four of five grantees specifically mentioned that they continued to build upon the ways in which they had engaged in grant-related work that had been new to them *(e.g., cohort-based learning, member task forces, regional re-granting)*

**Beyond formal research products, a number of case studies, summaries, blogs, articles, and other materials were produced as part of this set of grants. Similarly, grantees held webinars, conference sessions or other events to help disseminate lessons or related content that are not included in these numbers.*

- **Some grantees shared ways this has impacted or deepened their work around equity over time, though deep incorporation of an EDI lens has lagged in this focus area.** The 2016 RFP did not have a specific equity focus. Some nonprofits, such as First Nations and Women's Funding Network, were focused on equity issues from the start. All others noted that equity was an emerging trend for them in 2018 but the organizations varied in how explicit equity was in their work. While the entire sector has been part of a larger societal conversation around race and equity in 2020, several past grantees noted ways in which they had come to appreciate the ways in which feedback and transparency relate to EDI. One grantee shared that their grant project had helped to deepen their equity work more broadly. Three others noted various ways that feedback and openness provide a natural progression to more work on equity and power.

  > *"I think that the investment from Fund for Shared Insight definitely helped build my understanding and my team's understanding of how funders can create space for robust feedback loops. And I think where it's actually … translated to change in practice is that it's caused us to center our work on racial equity even more deeply and across -- very concretely, we have an annual conference every spring, and we have put equity at the center of the focus of that convening with community engagement and power dynamics and some of these other topics that are related to openness and feedback loops. So I would say that the Fund for Shared Insight support was not the sole reason that that's happened, but it certainly gave us a really deep dive by working closely with funders where we saw that issue come up time and time again."*

- **Co-funders increasingly value and support feedback after supporting L4G grantees, though not all desired outcomes for funder behavior change are being achieved.** L4G has had some impacts on co-funders, despite a light touch approach to engaging with them during this period. Across 52 co-funders from the 2016, 2017 and 2018 cohorts, we learned that co-funders generally already value feedback, but their perception about how feedback can help grantees and their foundation increases with L4G engagement. Additionally, co-funders anticipate a high likelihood of continuing to support nonprofit feedback practice after the grant ends. However, few co-funders actively promote feedback among their foundations or broader set of grantees, and few take real steps to increase their own use of feedback for their work. For these co-funders, the ask and engagement has been low, including invitations to events, periodic communications, and notification of additional funding opportunities. Given the light touch, achieving any outcomes is worth noting.[13] We do not know the degree to which co-funders from 2016 through early 2018 connect feedback with EDI; this is being explored in future data collection efforts.

[13] The Listen4Good Journey So Far: Lessons and Findings from Three Complete Cohorts. March 2020. https://d35kre7me4s5s.cloudfront.net/wp-content/uploads/2020/04/07110557/The-L4G-Journey-So-Far-ORS-Impact-Final-3.23.20-002.pdf

LEARNINGS and WONDERINGS

- **Low levels of investment and effort can help with bolstering value and support for listening and feedback among "the choir", but it has not led to a lot of behavior change.** Across co-funders and those who participated in Listening and Sharing grantee trainings and events, a light-touch approach can help some funders and foundation staff strengthen or increase awareness of and support for practices in line with what Shared Insight hopes to see. At the same time, this short-term outcome effect doesn't clearly suggest that longer-term outcomes are likely. And it seems most likely that this is among those with some level of support to begin with, versus expanding the pool of "believers." Given the level of effort and investment, it is hard as the evaluator to hold a high bar of expectations for outcomes, but it does seem like this area might show some missed opportunity for progress, given its continued centrality within the theory of change.

- **What elements and what investments are required for meaningful connections and power shifts?** As noted earlier, this focus area has shifted from "openness" to "listening and sharing" to "listening" over time, areas that are related, but also different from each other. Shifts in the field related to critiques of philanthropy, social/racial justice, and power generally create potential ripeness for these topics. As one former grantee shared, *"This might be a golden moment for the work that was not the case a few years ago when everybody thought everything was fine. Now everybody's realizing … it's been broken all along and we need to fix it."* Yet transparency isn't always about sharing power, and sharing without listening can feel like foundations are just taking up a lot of megaphones to push information out. At the same time, listening without sharing could feel extractive and one-dimensional in a different way. It is interesting to think about how the foundation practice change work can also encompass ideas of relationship and reciprocity, elements that may mean tying together some of these different threads, while also more explicitly talking about shifting power dynamics.

Build a Feedback Field

PHASE 1 STATUS (2014-2017)

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 became clear that many of the unique value-adds from Shared Insight's efforts—especially some of the non-grantmaking work—resulted in field changes. In the first three years, Shared Insight helped to further solidify a definition of what high-quality feedback could look like, with a focus on feedback that was ongoing, systematic, and included closing the loop. At the time, grantees and partners also reported greater demand for feedback supports, 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 for "why do feedback" to more advanced work around how to do feedback well.

PHASE 2 EFFORTS (2017-2020)

Field building became a more formal part of the theory of change in 2018, and since then has focused on influence and communications, staff time strategy, and some support for key institutional players and new research.

- $2,745,000 in grants (22% of grants in this period)
- $1,024,645 in supports[14]
- Field convenings:
  - Feedback Lab summits: 4 summits reaching approximately 600 people
  - Gathering participants: 358
- Approximately $1,053,000 in communications

[14] Includes convening, staffing, L4G business planning, and sunk 020 gathering costs. This does not include staff time for those who that work across aspects of the theory of change.

TABLE 6

ACCOMPLISHMENTS

For Build A Feedback Field

	2017-18	2018-19	2019-20
GRANTS	Feedback Labs grant, $750,000, 3 years (2017–2019) YouthTruth grant, $750,000, 3 years (2017–2019)	—None—	Research grants made (September 2019, 2 years), convening with partners (NYC, October 2019) $30,000 Center for Effective Philanthropy grant for COVID research (April 2020)
SUPPORTS *and related efforts*	Feedback gathering in Houston (May 2018)	Power of Feedback campaign, Stanford Social Innovation Review case on Shared Insight released	Had to postpone gathering in Baltimore Candid "How We Listen" campaign (3,500 Nonprofits signed as of June 2020). #feedback4equity campaign Feedback research consultant brough onboard

PHASE 2 OUTCOMES

Shared Insight continues to support field strengthening, particularly around focus, purpose, values, and standards of practice. About two years ago, we found that the state of the feedback field[15] was developing and likely moving to a new stage—from a state of "framing", where there is conceptual understanding and isolated practice examples, to "networking", where you see innovators connecting and a proliferation of practices, though practices are often fragmented and proprietary. At that point, we found relatively strong alignment across actors around a shared identity and growing standards of practice; some emerging strengths around knowledge base, leadership, and key constituency support; and less strength around codification of practices, evidence base, diversity in the field, , focus on EDI across field elements, and funding and supporting policy.[16, 17]

[15] For our purposes, we have defined the feedback practice field as: the set of leaders, advocates, academics, and consultants who seek to improve how organizations listen and respond to their clients' needs and preferences by defining and advancing a shared vision around systematically seeking perceptual feedback from their clients, facilitating alignment among stakeholders, setting shared standards, providing technical assistance, conducting research and evaluation, and helping align public policy and funding streams. We primarily focused on feedback practice in the United States, given the focus of Shared Insight's core work.

[16] Our assessment was built from the Strong Field Framework: (https://irvine-dot-org.s3.amazonaws.com/documents/64/attachments/strongfieldframework.pdf?1412656138)

[17] Feedback Field Assessment https://d35kre7me4s5s.cloudfront.net/wp-content/uploads/2019/02/10143306/Fund-for-Shared-Insight-Field-Assessment-Results-Final.pdf.

To update our understanding of the state of the field, in fall 2020 we spoke with five informants who are individual leaders in the field to get their perceptions.[18] While this represents a less robust data collection effort than our initial assessment, there were some strong themes. All of the leaders saw feedback as something that had become more standard, more accepted, more essential, and more accepted in the social sector field. Our informants also saw greater connection across those in the field, including more coordination across rating platforms—such as Charity Navigator, Better Business Bureau, and Candid—and that there seemed to be more expertise and competition in the field. Based on these comments, it does seem like the field has matured further since our last assessment.

- There has been progress and there remains room to grow around advancing equity through feedback. Our initial field assessment found that there was an opportunity/obligation to do more to foster greater diversity and inclusion in the field, and to promote greater uptake of EDI concepts and ideas as foundational to the field's standards, practices, research, and products. All informants shared that the shifting context in 2020, with uprisings for racial justice, was creating more openings for conversations about power dynamics, racial inequalities, and the recognition of the agency of those most harmed by current systems, with baked in institutionalized racism. Additionally, ongoing conversations about power and philanthropy have provided new openings for advocating about how foundations can operate differently. While several informants shared that this seemed to be leading more to things like general operating support and trust-based philanthropy, they also perceived increased interest in feedback from funders. It was heartening to see that our equity questions to informants led to answers more focused on power than technical fixes (e.g., segmenting data, data collection efforts). Yet, with the growth of the field, there are two things we'd lift up: First, as two informants shared, as more people accept and adopt feedback practices are risks:

  > *"If you don't close the loop, you've essentially … created a great entry point, but then you've made things worse than when you started. And I think that's kind of common knowledge, but I think we forget it. Because we get so obsessed with just collecting the information"*
  >
  > *"Feedback done poorly can lead to simply entrenching the same power structures that exist."*

- Investments to build the knowledge base need more time to yield benefits. We did not reconduct our online content analysis of existing research or resources to see if there were changes in the amount of aligned materials in the field, but field stakeholders continue to see gaps to fill, including real examples of funders changing course and research linking feedback to better outcomes. As noted in Table 5, Shared

[18] Informants included two ongoing grantees, two members of the self-named "Irritants" group, and an academic researcher.

Insight currently has seven research grants (two that have continued from the first phase) that will yield results later in 2020 and beyond.

- Specific infrastructure investments have strengthened and stabilized core feedback organizations. Shared Insight has continued to support Feedback Labs and YouthTruth with general operating support as core organizations in the feedback field. Since 2017, both organizations have grown. Feedback Labs has gone from ~300 to over 600 members, become an independent 501(c)3, managed a CEO transition, and built up its fundraising efforts and staff. They have also clarified their role in the field and the kinds of supports and resources they can provide to organizations. Over four Feedback Summits in three years, Feedback Labs has convened approximately 600 people around the topic. Before the COVID-19 pandemic hit the U.S., YouthTruth had surveyed over 1.5 million students across more than 360 districts in 39 states and five countries, with growth over the years. In addition, they exceeded earned and contributed revenue targets, and for the first time in 2019, went from being subsidized by CEP to generating revenue for CEP after meeting their fully allocated costs.[19]

LEARNINGS and WONDERINGS

- **While feedback field investments have been making inroads in the social sector, some areas are still untapped.** One is a greater focus on the public sector. Nonprofits that are government-funded are driven by the expectations of those funders, which does not include feedback from beneficiaries. There are some promising upticks in this area: there have been some one-off examples of public sector efforts and interest, as well as more interest from government agencies in current rounds of L4G, and trends in the education field to mandate student and family input. Another example is a broader connection with academic researchers to influence what they teach and how they prepare the future leaders of nonprofit organizations, such as Master of Public Administration programs or nonprofit management faculty. Finally, the current focus of the field might help create more value for and support of nonprofit feedback practices, but it isn't clear the degree to which this will translate into changing practices of funders to support nonprofits or collect and use feedback from their own ultimate beneficiaries, which might be a niche Shared Insight is well-positioned to address more directly in field building or through better integrating into foundation change efforts.

- **Shared Insight has invested more in communications and seems to be contributing to field-level interest and prioritization, and it is a ripe area to look into going forward.** Shared Insight has made a larger investment in communications over time, with communications campaigns (e.g.,

[19] YouthTruth pivoted when COVID-19 and school closures meant suspending planned surveys. For example, in mid-May, they launched a free, national survey to gather insights from 6th to 12th grade students about their learning experiences, social and emotional development, and wellbeing while their school sites were closed and released its findings from more than 20,000 students: "Students Weigh In: Learning & Well-Being During COVID-19."

#feedbackforequity), videos, and support for more voices across the core funders speaking out over time. While we have quantitative data on the volume of content and some sense of engagement related to these efforts, we don't know much about the effect of this work more broadly. This may be an area for deeper exploration in the future, especially as it has become a more explicit element of the field-building work.

- **Shared Insight could have a role in diversifying the field and ensuring feedback's relevance or connection to a broader set of people.** In identifying a small set of individuals who could speak knowledgeably about the feedback field, we realized that we ended up with a set of white people who have been and continue to be foundationally involved in this work. While we could brainstorm a set of more racially diverse individuals who might have a perspective on the topic, it still feels important to acknowledge that the time is right to think about who is supported, who this work is relevant to, and who is part of the inside work to advance this field. Shared Insight could have a unique and meaningful opportunity to continue finding ways to broaden who is part of these conversations, and, if these conversations aren't of interest, to explore why and how to change that. As is being learned in other areas, there could be related work under way or further developed that isn't referred to as feedback, or similar work in adjacent areas that could be engaged with. Recent conversations with Indigenous groups around work in climate change lifted up two issues: first, that long-time work around land management had been happening in these communities and, second, that the terminology of climate change or climate justice didn't resonate. It seems possible similar lessons could exist for feedback field work. It could be that relevant efforts are and have long been underway among those least heard and that the term feedback doesn't lead to resonance or connection across efforts. It may be worth new or different exploration to understand whether this work could align with, learn from, and expand to include practices and knowledge that hasn't been previously included.

Experiment & Innovate

PHASE 1 STATUS (2014-2017)

As part of the theory of change development, core funders desired a way to explore and try out new ideas that didn't fit neatly within the current set of focus areas, but might still help advance efforts toward the overall goal.

PHASE 2 EFFORTS (2017-2020)

- Identified two areas for experimentation and formed sub-committees: advocacy/policy and international work
- No grants made in this period
- $121,594 for advocacy scan and staffing support
- Published "Meaningfully Connecting with Communities in Advocacy and Policy Work: A Landscape Scan Commissioned by Fund for Shared Insight" by the Aspen Planning and Evaluation Program, April 2019

TABLE 7

KEY INVESTMENTS & SUPPORTS

For Experiment & Innovate

	2017-18	2018-19	2019-20
GRANTS	—None—		—None—
SUPPORTS	—None—		Published Aspen piece on meaningfully connecting in advocacy work Core funder approval of $800K to support international explorations Agreed on funding for participatory grantmaking experiment with climate and advocacy, hired consultants (early 2020, $1.5M allocated)

Given the timelines of these efforts, it is too soon to have seen outcomes or have lessons. This area will be more fully explored over the next three years and in the 2023 lookback report. However, ORS Impact facilitated an emergent learning conversation with Shared Insight staff to learn from and document the experience with the first two international organizations receiving support from the L4G team. The international work has moved in a different direction, but the memo outlined learnings what it looks like and what it might take to implement L4G internationally.[20]

[20] This report was not published in the Shared Insight website but is available from ORS Impact upon request.

Core Funders
Walking the Walk

PHASE 1 STATUS (2014-2017)

The original Shared Insight strategy did not have an explicit focus on core funders "walking the walk." In fact, when we asked the leadership at the start of our engagement in 2014 whether funders in the collaborative would be expected to change their behavior, the answer was a clear "no."

In the updated theory of change in 2014, Shared Insight included "encourage our core funders to 'walk the walk' of Shared Insight's commitments and values" as one of the five key focus areas. Shared Insight hypothesizes that, "*If we can't get our highly engaged core funders to make changes in their institutions, it's hard to imagine making philanthropic change at scale.*"[21] Walking the walk includes two elements:

- How our funder collaborative works to reflect our values and theory of change
- How individual funders live up to their commitments to have their individual institutions reflect the values and activities in our theory of change

PHASE 2 EFFORTS (2017-2020)

- Phase 2 began with 7 core funders and grew to 13
- Added EDI consultant to participate in core funder meetings, staff/consultant meetings, consult on the evaluation, and participate in sub-committee meetings (February 2017)
- Pivotal meeting in Montgomery, Alabama, with a visit to the Equal Justice Initiative's Legacy Museum and National Memorial for Peace and Justice as part of funder collaborative's EDI journey (November 2018)

PHASE 2 OUTCOMES

Most core funders are changing in ways aligned with their sphere of influence and context, and Shared Insight is contributing to those changes. In spring 2020, we interviewed representatives from

[21] Fund for Shared Insight Theory of Change [https://d35kre7me4s5s.cloudfront.net/wp-content/uploads/2019/11/22122112/Fund-for-Shared-Insight-Theory-of-Change.pdf]

11 of the core funders for Phase 2. Nine organizations reported changes aligned with the different aspects of Shared Insight's goal.

- Four core funders reported changes in **how they listen to and connect with grantees**, such as placing a greater value on high-quality listening to grantees, launching or expanding their grantee feedback survey, or updating values or principles to include listening.
- Four core funders reported changes related to **how they listen to clients**, including direct and indirect ways of listening, and two funders reported having ways to listen to clients directly to inform strategy development, and one is using Listen4Good intentionally as a vehicle to listen to clients through grantees.
- Two core funders identified ways they are **strengthening their grantees' ability to listen** to their clients. One has broadened their co-funding role with Listen4Good by expanding the number of nominated grantees and facilitating a community of practice among those grantees and other interested stakeholders. The other funder is using external tools by working with 60 decibels across multiple grantmaking portfolios and experimenting with IVR (interactive voice response, aka robocalls) to get client feedback.
- Finally, three core funders **supported the feedback and listening field-building efforts** by commissioning research around feedback and listening and sharing their experience with listening at conferences and meetings.

- **Among the nine core funder organizations that made these changes, eight clearly identified ways in which Shared Insight contributed to their efforts.** Specifically, Shared Insight has provided credibility and momentum to build upon a broader community of practice (3), accelerated work that was already happening within the foundations (2), directly influenced or informed listening practices developed by the foundation (2), and helped prioritize listening more intentionally in their work. In addition, core funders mentioned external factors that contributed to these changes, including existing foundation values or leaders who value feedback and listening (6), and the current momentum in philanthropy that aligns well with Shared Insight's goal (2).

- **Shared Insight itself has made changes to better walk the walk, especially around EDI.** ORS does not have a specific thread of evaluative work on Shared Insight; indeed, as an embedded partner, we have often specifically chosen not to also serve as an "internal" evaluator. Shared Insight itself describes how walking the walk works in two ways in the theory of change:

  - "*We emphasize the critical importance of building trust between nonprofit organizations and funders in order that feedback can be honestly shared. Shared Insight itself and its core funders will aim to model these relationships with the nonprofits we fund. We may not make grants in this area*

but we expect to address this issue in our convenings, communications, how we provide technical assistance, and so on.

- *We believe, in a fundamental way, that amplifying the voices of those least heard in and of itself represents important values of EDI in that historically and currently marginalized communities are those who are least heard. And, we as Shared Insight and its core funders, seek to bring lenses of EDI to our work, being mindful and supportive of these concerns. We may not make specific EDI grants but expect to address this through our outreach in funding, e.g. to different geographies, as we did in the deep South; cultivating a diverse pool or technical assistance providers and consultants; through how we structure our convenings, communications, and conversations; and how we integrate these lenses into all of our planning and ongoing work with the assistance of experts who can advise us on our journey."*[22]

As an inside-outside observer, we have a few observations.

- Related to the value of relationships and building trust, we know that staff acted quickly to change deadlines, move up funding, and relieve pressures from nonprofit partners and consultants as the scope of the pandemic became clear.
- We have also seen a marked change in the EDI focus over these past three years, from a tentative beginning of understanding where each partner organization was in their own journeys, to an explicit and increasing focus across core funder meetings and within new bodies of work. One year ago, Melinda Tuan, Managing Director, publicly shared more about the EDI journey of the collaborative,[23] as well as documented other operational steps taken, including continuing to diversify partners and consultants and reflect new principles and criteria for grantmaking efforts. Some core funders noted during our interview process that there is progress, the journey is still underway, and there is appetite and room for more ways that EDI can show up in grantmaking.

LEARNINGS and WONDERINGS

Broad agreement exists, but there were differences in how core funders understood "walking the walk." Generally, all core funders we spoke with talked about walking the walk as a focus on how those around the table should change their practices and policies to be in alignment with what Shared Insight promotes more broadly. This included seeking feedback from and centering community/voices least heard/those we seek to help in strategy, supporting grantees to collect and listen to feedback from

[22] Fund for Shared Insight Theory of Change [https://d35kre7me4s5s.cloudfront.net/wp-content/uploads/2019/11/22122112/Fund-for-Shared-Insight-Theory-of-Change.pdf]
[23] Insights from an Equity, Diversity, and Inclusion Journey by Melinda Tuan https://cep.org/insights-from-an-equity-diversity-and-inclusion-journey/

their constituents, listening to grantees, and being more meaningfully connected to grantees and community. Within this broad agreement, there were some interesting nuances. Some saw this as an important way to be consistent with the ask of nonprofits; in other words, we shouldn't promote changes among nonprofit practices without demonstrating a willingness to also seek feedback and listen to constituents who, in this case, are nonprofit grantees. But more saw walking the walk as an element of the effort to change philanthropy more broadly. Some talked about the degree of this group's influence and credibility to make changes and inspire change in other funders. Some spoke of the ability to learn and experiment so that there could be deeper understanding for what might work among more funders more broadly.

- **Most people sought out the opportunities that were most available to them given the context of their foundation and their individual positions.** In some cases, someone within a large foundation was able to opportunistically find another inside champion and seed experiments. For another, this meant changing grantee experience standards, which sat under their purview. On the other hand, one funder who hadn't made changes was very clear that in their context, there was no incentive to make changes and little likelihood of success. In many ways, these variable and idiosyncratic approaches suggest that awareness of and value for listening are a key factor in making change, and that changes can be context specific but meaningful and aligned within that diversity of approaches.

- **To date, walking the walk has largely stayed confined to core funder representatives around the table.** Almost all those who participate in Shared Insight that we spoke to have taken actions to bring back the ideas and priorities of the collaborative to share with colleagues in their own institutions. However, that hasn't resulted in great awareness or uptake among staff or significant changes in leadership priorities.

Reflections on Strategy & TOC

At the end of the first three years, we used Mintzberg's framework for strategy, where we consider what was intended but also that realized strategy is a result of those things deliberately pursued, emergent elements added along the way, and unrealized elements that don't come to fruition.[24] Because the updated theory of change and associated implementation markers were adopted in this period, there doesn't seem to be much that has been planned but unrealized. We have seen more examples of emergence, especially within the key focus areas, including nimble efforts to connect feedback and listening to responses to COVID-19 and uprisings over racial injustice. This may be a more useful framework again as more time passes.

When reviewing the theory of change in light of this assessment, we don't have any evidence to show flawed logic or major shifts to core assumptions behind the work to suggest changes. We will note two considerations, however:

Consideration 1

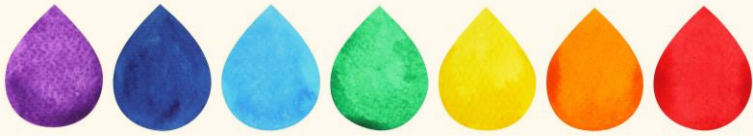
Is the theory of change expecting more of nonprofits and less of funders? The theory of change's short-term outcomes seems to focus more on nonprofits changing practice, and focuses more on funders increasing value, promotion, and support of feedback for nonprofit and themselves. It does not suggest that nonprofits should ask for more or different of funders, and data so far does not make a good case that awareness and value for feedback is leading foundations to *act* differently.

Consideration 2

Short-term outcomes could be achieved in ways that make mid-term outcomes around EDI and later outcomes around power shifts easier or harder. While there is acknowledgement of EDI lenses feeding into all of the outcomes and efforts, further interrogation of who needs to change and how the field, tools, and practices are being developed could make this advancement of equity a bigger or smaller leap going forward.

[24] Mintzberg, 2007 Chapter 1.

Responding to COVID-19
and Other 2020 Events



It is impossible to report on work in 2020 without acknowledging the impact COVID-19 and uprisings for racial justice and their effect on the social sector and the populations too often least heard. As the table below illustrates, Shared Insight staff quickly reacted to changing conditions to make changes to existing work, as well as find ways to respond to differently and in new ways along the way.

While the quick pivots and adjustments should support longer-term maintenance of previously achieved outcomes and new results, the longer-term effects of the pandemic and uprisings on nonprofits and the work of Shared Insight is yet to be understood. From surveys of L4G's online beta organizations in June, 77 percent of responders said COVID-19 had affected how their organization served its clients "a lot", and 39 percent had stopped collecting feedback but planned to resumed, and 26 percent had reduced the amount of feedback they were collecting. We will continue to watch and seek to understand what these external factors mean for ongoing progress and lessons learned.

TABLE 8

SAMPLE OF RESPONSES

*To COVID-19 & Uprising for Racial Justice**

	Adjustments to Existing Work	New Responses
Build NONPROFIT *Practice*	Extended timelines for ongoing cohorts, acknowledging need to pause, slow down or adjust	New supports for getting feedback about COVID-19 response Make Listen4Good available to nonprofit organizations associated with the more than 750 funders who have signed the COF pledge
Build FOUNDATION *Practice*		New expanded set of webinars created New grant to Center for Effective Philanthropy about how nonprofits are responding to COVID-19 Inclusion of listening in COVID-19 Foundation Pledge
Build a Feedback FIELD	Postponed 2020 Gathering Provided immediate additional GOS grants for Feedback Labs and YouthTruth New videos made from existing material versus new reel content	Virtual TA sessions held in lieu of Gathering
Core FUNDERS *Walking the Walk*	Personal outreach and moving up consultant contracts to provide stability and support to partner consultants and organizations	Support Black-owned businesses for meeting treats (e.g., Pinckney Cookies)

Please note this table provides illustrative, not comprehensive, examples of the ways in which Shared Insight responded in 2020.

Observations

Shared Insight has continued making a contribution around feedback as a practice, especially for nonprofits. As was true in the first three years, work around feedback, openness, transparency, and the like were not untilled ground. Yet, the work of Shared Insight continues to advance and accelerate these topics in ways that seem beyond what is likely to have occurred without its contributions. Investments in the field continue to help build attention, support, and traction. It seems unlikely that similar tools to scale nonprofit feedback practice would have emerged organically. At the same time, foundation practice change still lags and proves more elusive, though there was less investment and focus on that area during this period upon which to expect greater impact.

Many tailwinds likely accelerated progress in this phase. 2017 marked a change in presidential administrations and has highlighted long-term systemic issues and racial inequities in new ways, particular in 2020. In some ways, the external context of US politics and society, as well as a number of critiques of philanthropy and wealth inequality, helped to advance the EDI conversation and the Many tailwinds likely accelerated progress in this phase. 2017 marked a change in presidential administrations

and has highlighted long-term systemic issues and racial inequities in new ways, particular in 2020. In some ways, the external context of US politics and society, as well as a number of critiques of philanthropy and wealth inequality, helped to advance the EDI conversation and the recognition that funders and nonprofits may need to act and listen differently than many traditionally had—especially those who worked to serve issue areas and communities that did not reflect their own lived experiences. We can't separate out what difference this made in the accomplishments to date, but it can't be ignored that many social drivers and trends may have softened the ground and provided new and different opportunities to advance this work.

- **Shared Insight has shifted roles in these three years, from primarily being a joint grantmaker to embracing and building upon its ability to convene and influence.** While the use of communications and influence was never absent, reviewing the work of the last three years really highlighted the ways in which the collaborative has added capacity and put more time and resources into efforts to have influence beyond the work supported. Communications from a wide variety of voices has been supported. The adoption of "walking the walk" more explicitly acknowledged and recognized the opportunity to model and make an impact by doing the work individually and as a collaborative. Additionally, new efforts to convene groups of grantees, including those funded to support research and the newest Funder Listening Community of Practice, highlight ways of both operating more collaboratively and also investing in relationships and ecosystems differently than supporting individual projects. It will be interesting to explore the broader impacts and ripple effects these activities might have that are different from work that is more programmatic in nature.

- **What is the opportunity and obligation of the feedback community, and this funder table to ensure that feedback is--at least--not an exacerbator of inequity and, at best, a transformative tool for equity and justice?** The Equitable Evaluation Initiative principles ask us to answer critical questions about "*the ways in which historical and structural decisions have contributed to the condition to be addressed, and the ways in which cultural context is tangled up in both the structural conditions and the change initiative itself*."[25] Shared Insight's work is necessary, in part, because so often those most impacted by systems, policies, and social sector responses to oppression and injustice are not listened to. High-quality feedback practices—when adopted widely and done well, with action and closing the loop—can be a way to transform power dynamics, shift power, and support better solutions and equitable outcomes. And yet this feedback work also occurs in a society not fully transformed to address the institutionalized racism that exists, and in a context where white-dominant norms still often dominate. Norms around who knows best, whether people know what they need, whether we openly talk about race or privilege, and/or have an expectation of comfort when we think we are the helper/do-gooder.

[25] The Equitable Evaluation Framework https://www.equitableeval.org/ee-framework, Principle 2.

There seems to be an emotional, "heart" side of being able to listen and really hear what others are saying, what they need, and what they value, that is more than just having a technically effective tool or process. This is also true when we think about meaningful connections between nonprofits and foundations, and foundations and the people they seek to serve. We think, for example, of the impact of the core funders meeting in Montgomery, Alabama, to experience the Equal Justice Initiative's The Legacy Museum: From Enslavement to Mass Incarceration and the National Memorial for Peace and Justice. That emotional journey and experience of the funder collaborative members' time together in Montgomery went far beyond intellectual conversations about EDI. It is worth continuing to wrestle with what it really takes to be anti-racist, to decolonize the work, and to fight against norms of white supremacy in new and increasingly robust ways over time.

Looking Ahead

These three-year periods of reflection are an artifact of a decision from 2014—a choice about an amount of time that people would sign onto that would provide enough of a runway to accomplish something. So, while three years is slightly arbitrary, these periods provide a useful moment to pause, take stock, reflect on what has been, and take those lessons into the next phase of work.

We've heard this period referred to as the "second book of a trilogy," which can be a tricky endeavor. The first book is exciting—there are new casts of characters, new plots, a new world. Often second books can get stuck straddling the line of being a bridge to a climactic finale, if authors don't find their footing with the right plot twists and new developments. [26]

[26] Originally stated by Melinda Tuan, ideas further built out from this blog entry by a writer: https://deborahjross.blogspot.com/2013/08/the-middle-book-of-trilogy.html

These last three years from 2017 to 2020 were not start-up years for Fund for Shared Insight. The prior three years resulted in work and learning for the funder collaborative to build upon, even as new players joined the table and added their own fingerprints to the work. It's also a period that has shown further maturation of the collaborative, including co-chair leadership transitions and new sub-committees, as well as meaningful work to truly engage in embedding EDI into the work. Progress has continued around the use, quality, and prioritization of feedback, especially among nonprofits, and foundation change continues to be more at the margins.

Looking ahead to 2023, there is much to keep building on the progress to date. There are new opportunities to wrestle with how all areas of work can be inclusive and be effective tools against racial, economic and environmental oppression and for social justice. 2020 has called all of us to be more forward and more direct in our language and our ambitions around anti-racism and shifting power. We hope Shared Insight heeds that call; we look forward to continuing to help assess, learn and shine a light on opportunities as this work progresses forward over the next three years.

Appendix

METHODS, STRENGTHS AND LIMITATIONS

As part of the wrap up for this second three-year phase, ORS Impact designed an evaluation, in consultation with the Evaluation Sub-Committee, focused on using existing data with some modest additional data collection efforts to create a report that summarizes the progress and lessons learned so far, along with opportunities for the likely third/next phase of Shared Insight. In addition to looking at the progress of this second phase, we considered what other longer-term outcomes may have occurred from the efforts of the initial three-year set of activities and grants. Our primary audience was the core funders, though we expected the product would be shared with grantees, partners, and the field at large. Our primary purpose was to support ongoing collective learning and refinement of the fund's efforts going forward.

Across the strategy areas of the theory of change, we have a few consistent types of questions to explore, including:

1. What has the work looked like? What was sustained from Phase I (2014 – 2017) to Phase II (2017-2020)? What has been added, changed or abandoned? How have equity, diversity, and inclusion (EDI)27 been embedded into processes/strategy/thinking?
2. What outcomes have occurred, including those in the theory of change, including or highlighting unexpected outcomes, and other outcomes associated with using a EDI lenses?
3. What are the lessons learned from Phase II to share with the field or take into consideration for the next phase of work from 2020 - 2023?

Considerations for developing these questions included:

- Variable levels of investment/activity in the different focus areas.
- Use of an equity, diversity, and inclusion lenses in how the work is done and the results of that work.
- Acknowledgement that the theory of change for this work was completed in 2018 and some work won't yet show results.

[27] While Shared Insight uses the acronym "EDI" to refer to its focus, the evaluation will consider each of the elements (i.e., equity, diversity and inclusion) as separate and distinct concepts for which there could be processes and outcomes.

SUMMARY OF DATA COLLECTION

- Interviews:
  - L4G coach interviews (n=8)
  - Listening and Sharing grantees (n=10)
  - Small number of follow-up field assessment key informant interviews (n=6)
  - Interviews with Phase 2 core funders (n=15, conduct by organization, not individual participants)
- Secondary data:
  - Data on current grants, i.e.,Feedback+ events (participants, surveys?) and YouthTruth usage
  - Shared Insight Core Funder Meeting materials
- Meta-analysis of prior evaluation products (cited throughout) which utilized a range of surveys, interviews, secondary data analyses, etc.

Considerations for methods included:

- We wanted this to build upon data collected over the past three years, augmented as necessary.
- We wanted to minimize burden on stakeholders, especially if data have been recently collected (e.g., the field assessment, the theory of change assessment).
- We want this to be a higher-level overarching view of progress and lessons.

NOTE ON TIMING AND CONTEXT

The evaluation was designed in January and February 2020, originally anticipated to be produced and shared as part of the July 2020 Core Funders meeting. With the advent of COVID-19, ORS and the Shared Insight team paused the evaluation. It did not seem appropriate to ask for the time and attention of nonprofit partners when so many were responding to emergent and heightened needs of the people they serve, and when organizations could have been more focused on their own health and survival. However, we did conduct interviews with core funder representatives in May and June, after asking funders about their interest and availability in participating at that time.

The evaluation ultimately was largely completed in the fall, with most original data collection happening in September and analysis and report writing wrapping up in October 2020, prior to the 2020 election and after the initial response to COVID-19 and the uprisings for racial justice in the spring and summer.

STRENGTHS AND LIMITATIONS

All evaluations include tradeoffs, a balancing of how to best interrogate questions of interest while considering things like the level of investment, the burden upon others, as well as important considerations around how and by whom the work is shaped and interpreted.

This overall lookback has the benefit of pulling from a variety of other individual evaluation products that delved deeply into various elements of the theory of change, including an array of data across Listen4Good cohorts, an in-depth analysis of the field, which included secondary data, and focus groups with clients of Listen4Good organizations. These various efforts help provide a rich set of lessons and outcomes that were augmented with some additional data. There are also benefits to our longer-term partnership with Shared Insight, in that we deeply understand the content, the intent, the terminology, and the principles and values behind the work.

At the same time, limitations and inherent biases exist. Much of the data come primarily from self-report—co-funders, representatives of nonprofits, and core funders sharing information about themselves and their organizations with us. Self-report is the best way to understand changes in individual attitudes and values. However, we still often have to rely on informant's for other things that could benefit from other perspectives or triangulation, such as changes in behavior or organizational culture or practices. This evaluation is also squarely focused on what occurred within the organizations and areas where Shared Insight has placed direct effort; we are not able to speak to whether, how, or to what extent the work has led to ripple effects, outcomes, or lessons among those in the field less directly connected to Shared Insight.

It is also important to acknowledge that, as evaluators, we do bring our own personal expertise and experiences to bear in how we question and understand the world. While we bring expertise around data collection and analysis, and inquiry and reflection, we cannot truly be neutral as people who do evaluation work. Additionally, we are not neutral in the fight for racial justice and seek to bring questions to the fore in our analysis and synthesis that consider power, advantage, harm, and root causes.

This is our best attempt to make sense of and lift up what we have heard from others about changes that have occurred, what lessons have been learned, and what we think can help advance this work going into the next phase. With these factors in mind, we hope that the evaluation does lift up some useful findings that can continue to help contribute to the goal that "the people and communities we seek to help, especially those whose voices are least heard, are better off in ways they define for themselves."

ORSIMPACT

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