

## **Fund for Shared Insight Theory of Change 2017 – 2023**

**DRAFT as of 8/30/21 with accurate 1/21/21 update to “Build Feedback Field”  
Language updated 8/31/21**

### **Fund for Shared Insight Goal Statement**

Foundations and nonprofits are meaningfully connected to the people and communities most harmed by structural racism and other systemic inequities and more responsive to their input and feedback.

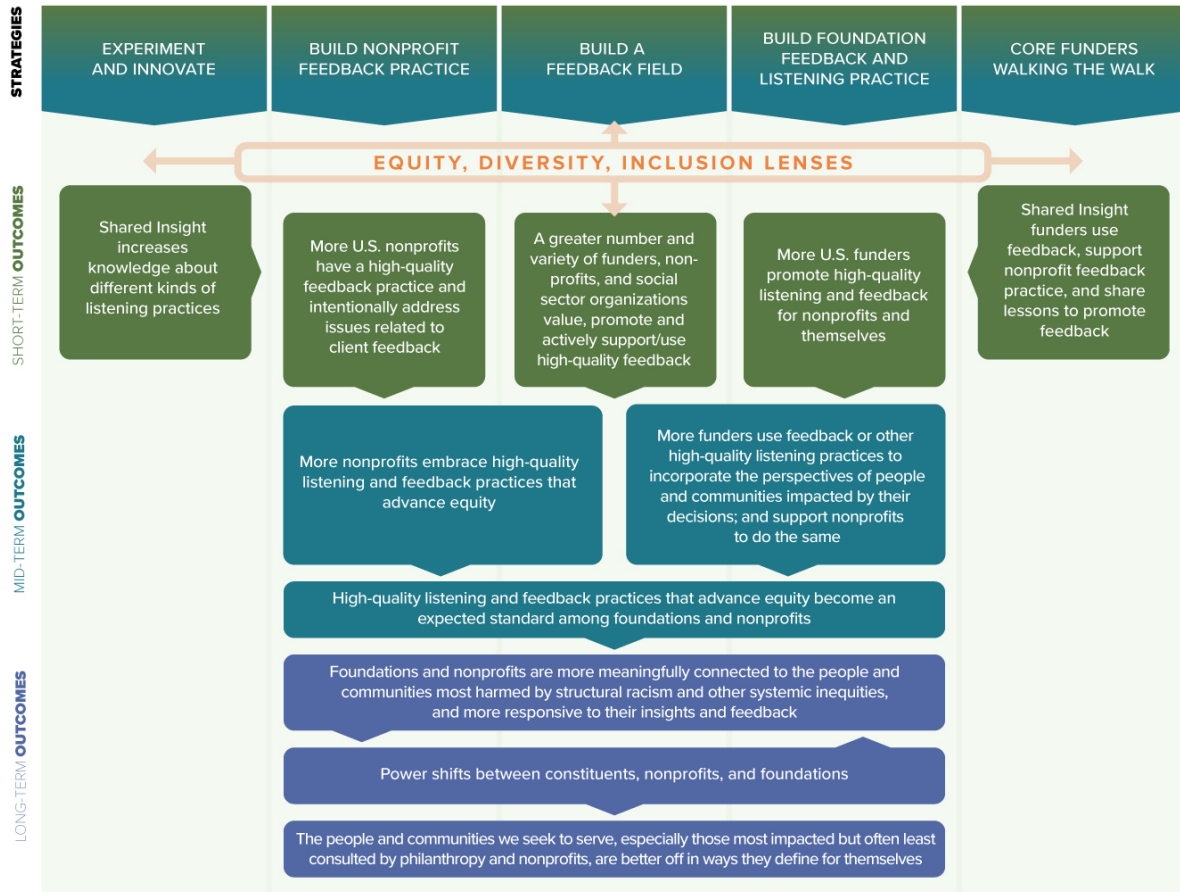
### **Fund for Shared Insight Impact Statement**

The communities and people at the heart of our work, especially those most impacted but often least consulted by philanthropy and nonprofits, are better off in ways they define for themselves.

### **Fund for Shared Insight Focus Areas**

To achieve our goal and desired impact, we are taking a multi-pronged approach — using our dollars, influence, communications, and convening power — across five interrelated focus areas:

- Building nonprofit feedback practice
- Building foundation feedback practice
- Building a feedback field
- Experimenting and innovating
- Promoting core funders walking the walk



## How We Do Our Work

The pages ahead will elaborate our theory/hypothesis; assumptions; what we’ve learned; how this work reflects our commitment to advancing equity; and our draft implementation markers. But first we want to highlight two essential ways in which we approach our work across all five focus areas:

1. We emphasize the critical importance of building trust between nonprofits 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, including in our convenings, communications, and how we provide technical assistance.
2. We believe, in a fundamental way, that amplifying the voices of those least heard in and of itself represents important values of equity, diversity, and inclusion (EDI) in that the people and communities most harmed by structural racism and other systemic inequities are often those most impacted but least consulted by philanthropy and

nonprofits. And we, as Shared Insight and its core funders, seek to bring lenses of equity, diversity, and inclusion to our work – in particular, engaging an equity lens to address and shift the underlying power structures that operate within and between foundations, nonprofits, and communities.

For more detailed definitions of “voices least heard,” “meaningfully connected,” and “more responsive,” please see the appendix.

## **1. BUILD NONPROFIT FEEDBACK PRACTICE**

### **Theory/Hypothesis**

In general, nonprofits want to listen to the people they serve, but do not currently have the capacity to listen systematically and on an ongoing basis. They need tools, resources, and supports to build capacity for technical and adaptive skills to implement a high-quality feedback loop, which we define as designing a survey, collecting feedback, analyzing feedback, responding to feedback, and closing the loop. Shared Insight aims to provide funding and tools and resources – through its Listen4Good (L4G) initiative – to help nonprofits meaningfully connect with the people and communities most impacted by their work and have conversations with their funders about what they are learning from feedback.

### **Assumptions**

- There is a need for high-quality feedback loops among customer-facing nonprofits in the United States, but we do not assume there is a demand for this. Therefore, we need to build a market for high-quality feedback practice
- Nonprofits organizations seeking to build feedback practice often don't know where to start and could benefit from assistance designing a feedback loop for their population
- Funders are also a target audience for building nonprofit feedback practice because they can incentivize nonprofits to collect feedback, connect in a more meaningful way with nonprofits and their clients, and learn from them to inform their grantmaking strategies
- Different kinds of tools are needed by different kinds of nonprofits (e.g., customer-facing, advocacy, international, etc.), some of which may not be about feedback

### **What We've Learned**

- Funding individual organizations to build custom feedback systems is not the best, most efficient use of funds or way to scale nonprofit feedback practice
- We can successfully build the capacity of customer-facing nonprofits to implement high-quality feedback loops through Listen4Good
- Through high-quality feedback loops, nonprofits learn and make changes in their program offerings and operations in service of improved outcomes for clients

### **How Does This Reflect Our Equity, Diversity, Inclusion Lenses?**

- We conduct outreach to diverse geographic areas, issue areas
- Through Listen4Good, we prioritize organizations that serve people most impacted but least consulted by nonprofits and philanthropy
- We recruit for diversity among our L4G feedback coaches

- We are mindful of how our L4G tool can be administered in multiple languages, multiple formats (e.g., paper, online, in-person), and adapted for use by populations who are rarely surveyed
- We use equitable evaluation principles in assessing our work and progress (e.g., we require organizations to disaggregate their client feedback by key demographic characteristics, such as client gender, race/ethnicity, and age.)

Implementation Markers (By end of 2023)	Measurement Sources
<ul style="list-style-type: none"> <li>• Continue to support organizations in L4G 2018 - 2020 in a high-quality manner (as measured by average NPS score of 70)               <ul style="list-style-type: none"> <li>○ 57 2018R2 co-funded grantees (October 2018 - June 2020)</li> <li>○ 185 online beta organizations (June 2019 - December 2020)</li> <li>○ 51 2019 co-funded round (January 2020 - June 2021)</li> <li>○ ~50 2020 co-funded round (September 2020 - March 2022)</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• ORS: 9-month and 18-month surveys – L4G's average NPS rating</li> </ul>
<ul style="list-style-type: none"> <li>• 70% of nonprofits* participating in L4G report intention to or having made changes halfway through the grant period</li> </ul>	<ul style="list-style-type: none"> <li>• ORS: 9-month survey</li> </ul>
<ul style="list-style-type: none"> <li>• 85% of nonprofits* report intention to continue feedback work post-L4G halfway through grant</li> </ul>	<ul style="list-style-type: none"> <li>• ORS: 9-month survey</li> </ul>
<ul style="list-style-type: none"> <li>• Develop accessible resources that advance equity and inclusion goals broadly, including guidance for surveying “edge” populations and approaches that empower clients, that are accessed by 30% of grantees</li> </ul>	<ul style="list-style-type: none"> <li>• L4G: existence of resources (on web app, in coaching tools, or on Zendesk)</li> <li>• Utilization as measured by download rate self-reported data (ORS)</li> </ul>
<ul style="list-style-type: none"> <li>• Consider and integrate EDI in L4G staffing, resources, products, and approach to the marketplace</li> </ul>	<ul style="list-style-type: none"> <li>• L4G: EDI threads throughout resources on web app, in coaching tools, or on Zendesk</li> </ul>
<ul style="list-style-type: none"> <li>• Develop business plan for L4G in 2021, informed by lessons learned from coached and online beta portfolios,</li> </ul>	<ul style="list-style-type: none"> <li>• L4G: final deliverable created</li> <li>• L4G: fundraised amount</li> </ul>

Implementation Markers (By end of 2023)	Measurement Sources
which supports successful fundraising of \$6-\$9MM in seed capital for L4G	
<ul style="list-style-type: none"> <li>Scale L4G to reach more organizations beyond those in grant program, effective 2021</li> </ul>	<ul style="list-style-type: none"> <li>L4G: 2021 "public" launch happens</li> <li>L4G: # of participating organizations</li> </ul>
<ul style="list-style-type: none"> <li>Create go-to-market plan including marketing strategy, requisite infrastructure to support increased reach and service of nonprofits</li> </ul>	<ul style="list-style-type: none"> <li>L4G: marketing strategy created, infrastructure created, # of nonprofits using L4G</li> </ul>

Short-Term Outcomes (within 1 year of participation in L4G / 2021):	Measurement Sources
<ul style="list-style-type: none"> <li>60% of nonprofits* report average capacity gains of one point on a five-point scale during L4G grant period halfway through the grant period</li> </ul>	<ul style="list-style-type: none"> <li>ORS: 9-month survey</li> </ul>
<ul style="list-style-type: none"> <li>L4G has paid users and records initial earned revenue</li> </ul>	<ul style="list-style-type: none"> <li>L4G: earned revenue</li> </ul>

Medium-Term Outcomes (within 2 years of participation in L4G / 2022)	Measurement Sources
<ul style="list-style-type: none"> <li>60% of nonprofits* make changes based on feedback by the end of grant period</li> </ul>	<ul style="list-style-type: none"> <li>ORS: 18-month survey</li> </ul>
<ul style="list-style-type: none"> <li>85% of nonprofits* report that L4G impacted their program effectiveness by the end of grant period</li> </ul>	<ul style="list-style-type: none"> <li>ORS: 18-month survey</li> </ul>
<ul style="list-style-type: none"> <li>60% of nonprofits* maintain feedback practices (using L4G or other tools) following conclusion of L4G grant</li> </ul>	<ul style="list-style-type: none"> <li>ORS: 1 year post program participation follow-up interviews</li> </ul>
<ul style="list-style-type: none"> <li>L4G has 400 new users post-public launch</li> </ul>	<ul style="list-style-type: none"> <li>L4G: # of users post-public launch</li> </ul>
<ul style="list-style-type: none"> <li>L4G has been spun out as a separate entity</li> </ul>	<ul style="list-style-type: none"> <li>L4G: structure</li> </ul>

Long-Term Outcomes (≥ 3 years)	Measurement Sources
<ul style="list-style-type: none"> <li>• Nonprofits are increasingly responsive to client feedback and perspectives on how they could improve and make changes in response</li> </ul>	<ul style="list-style-type: none"> <li>• Field-level survey (e.g., "How We Listen" or other field-level scans)</li> </ul>
<ul style="list-style-type: none"> <li>• L4G has 1,200 cumulative new users post-public launch</li> </ul>	<ul style="list-style-type: none"> <li>• L4G: # of users post-public launch</li> </ul>
<ul style="list-style-type: none"> <li>• More nonprofits are seeking supports and resources for doing high-quality feedback (shared with build a feedback field)</li> </ul>	<ul style="list-style-type: none"> <li>• Field-level survey (e.g., "How We Listen" or other field-level scans)</li> </ul>
<ul style="list-style-type: none"> <li>• L4G experiences positive growth (e.g., 30%) as a market-based offering for building nonprofit high-quality feedback loops</li> </ul>	<ul style="list-style-type: none"> <li>• L4G: growth in # of users</li> </ul>

\*Includes both co-funded and online beta organizations

† Also Shared Insight field-level goal

## 2. BUILD FOUNDATION FEEDBACK AND LISTENING PRACTICE

### **Theory/Hypothesis**

In general, funders say that listening to the people most impacted by their decisions is important, but they do not currently have the capacity to listen systematically and on an ongoing basis. They need to be encouraged by peers to use existing tools to listen to their grantees and act on what they hear. They need tools, resources, and supports to build capacity for technical and adaptive skills to incorporate high-quality feedback from grantees and the people and communities they serve into their work and to inform their own strategies, goals, activities, and grantmaking. Shared Insight, as a peer funder collaborative, can create multiple avenues for funders to access tools and resources, hear about peer examples, and learn from each other.

### **Assumptions:**

- Funders need to have meaningful connections with the nonprofits they fund in order for feedback practices to be effective
- Funders will be most influenced by their peers and by being engaged directly in supporting the work of high-quality feedback loops
- Engaging foundations as co-funders to make feedback grants to their own grantees may lead them to more behavior change and interest in this topic than funders who are only hearing about the work but not invited to join
- Funder behavior change is hard and doesn't happen organically or quickly in our experience and thus requires an array of activities that are targeted at different levels and levers of change
- Funders first need to understand what a high-quality feedback loop is, then be inspired about how feedback loops can be a tool for increasing nonprofit and foundation effectiveness before they can successfully incorporate feedback into their own work

### **What We've Learned:**

- Funders are influenced by their peers
- Co-funding with Shared Insight through Listen4Good can lead to increased buy-in and support for feedback
- L4G co-funders are making changes to their foundation practice based on feedback
- Closed funder networks can have easier reach and achieve more outcomes in terms of funder behavior change
- Issues of equity, diversity, and inclusion are motivators for this work

### **How Does This Reflect Our Equity, Diversity, Inclusion Lenses?**

- Foundations that want to be more inclusive and/or move down the path toward equity need to have the priority and practice around listening and responding to the people and communities at the heart of their work
- We conduct outreach to foundations in diverse geographic areas, issue areas



- We prioritize partnering with foundations that fund nonprofits that listen to and reflect people most harmed by structural racism and systemic inequities
- We prioritize outreach to funders who work in communities and with organizations that are most impacted but typically least consulted by philanthropy

Ref. #	Current and Past Activities 2017 – 2020	Future Activities 2020 - 2023
1		Fund philanthropy infrastructure organizations that produce knowledge resources <i>and</i> host conferences for the sector to: (i) Develop feedback/listening toolkits, guides, and case studies for foundation staff on how foundations are listening and using feedback in grantmaking and strategy development (ii) Engage in strategic dissemination and coaching plans that include offering training, programs, and/or tracks on listening and feedback at their conferences (iii) Help curate these and other existing tools for funders
2		Create communications messages tailored to different funder audiences (e.g., trust-based philanthropy, EDI, evaluation) to make the case for feedback
3		Support and incentivize social sector capacity-building tools to incorporate feedback and listening (Grantee Perception Report (GPR), Candid/GuideStar, Human-Centered Design, FCCAT, CCAT, OCAT, OMT)
4		Invest in key feedback infrastructure organizations with multi-year, GOS support (Feedback Labs, YouthTruth)
5		Invest in feedback research grants to explore relationship between feedback and outcomes and dissemination of results
6	Shared Insight Gatherings (2016, 2018)	Hold bi-annual Shared Insight Gathering (2021, delayed due to COVID-19)
7	Listen4Good co-funder/grantee meetings; held regional gatherings for funders and nonprofits engaged in feedback and listening	

	(Irvine 3/28/19, Barr/TBF 7/18/19)	
8		Partner with Center for Effective Philanthropy (CEP) to encourage their 300+ GPR-users to incorporate feedback and listening practices into their grantmaking and strategy development
9		Partner with COF to encourage their 800+ pledge signers to incorporate feedback and listening practices into their grantmaking and strategy development
10		Partner with Leap Ambassadors to encourage their philanthropy members to incorporate feedback and listening practices into their grantmaking and strategy development
11	Create funder engagement strategy targeted first at L4G co-funder community	Engage 28 2019 and 2020 L4G co-funders through requirements of funders
12		Focus on Shared Insight L4G co-funders as community of practice with high-touch peer-to-peer coaching
		Support core funders in walking the walk

	Implementation Markers (by end of 2023)	Measurement Sources
1	Two dedicated (people) funder engagement resources by July 2020	Staff count
2	EDI is considered and integrated in funder engagement resources and products	EDI threads throughout tools and resources
3	At least two philanthropy field surveys have incorporated questions on feedback and listening into their core question sets by 2022 (CEP, GEO, etc.)	Assessment of philanthropy field surveys and whether they incorporate questions about feedback and listening
4	Number of core funders, sidecar funders, Listen4Good co-funders hosting meetings about feedback (e.g., lunch and learns, regional gatherings) grows by 25% each year	# of funder-hosted meetings each year
5	Diverse set of 150 Shared Insight funders by 2022, diverse with respect to size of staff and	List of Shared Insight funders

	grantmaking, focus areas of work, type (e.g., family, independent, community foundations), location/geography	
6	Complete at least three one-on-one touchpoints with 90% of L4G co-funders during the grant period (2019 and 2020 cohorts)	L4G co-funder engagement tracking spreadsheet
7	Successful adoption (definition TBD by business planning) of funders as one set of buyers for L4G (Shared with nonprofit practice and build a feedback field)	TBD
8	One-on-one outreach to at least 25 new to Shared Insight foundations each year	Staff track funder outreach (Melinda's Outlook folders)

Tripwires:

- No interest in adding questions about feedback to philanthropy field surveys

Short-Term Outcomes (by June 2021)	Measurement Sources
<ul style="list-style-type: none"> <li>• Growing number (25) Shared Insight funders share lessons to promote feedback and listening (e.g., how they are incorporating feedback and listening into their work, how they are changing, what they are learning)</li> </ul>	Count funders involved with Shared Insight communications efforts (e.g., articles, blog posts, speaking at conferences, doing peer-to-peer outreach)
<ul style="list-style-type: none"> <li>• At least two-thirds of Shared Insight funding partners make some change in their internal practices related to feedback and listening (e.g., changing site visit, grant application, grant reporting templates; doing the GPR; asking/supporting grantees in feedback beyond L4G co-funding; voices informing strategy development, governance) (Shared with build a feedback field)</li> </ul>	ORS evaluation of core and L4G co-funders
<ul style="list-style-type: none"> <li>• 30% of Shared Insight funding partners indicate that L4G has contributed to the changes they've made in their internal practices related to feedback and listening</li> </ul>	ORS evaluation of L4G co-funders

Medium-Term Outcomes (by June 2023)	Measurement Sources
<ul style="list-style-type: none"> <li>• More foundations are funding feedback capacity-building for nonprofits</li> </ul>	Count funders that are funding feedback capacity-building
<ul style="list-style-type: none"> <li>• More funders use feedback or other listening practices to incorporate the perspectives of people and communities they seek to serve; identify and address equity, diversity, and inclusion issues related to client feedback; and support nonprofits to do the same</li> </ul>	
<ul style="list-style-type: none"> <li>• High-quality feedback and listening practices that reflect equity, diversity, and inclusion considerations become an expected standard among foundations</li> </ul>	

Long-Term Outcomes	Measurement Sources
<ul style="list-style-type: none"> <li>• Many foundations can point to specific examples of how feedback has informed their strategies, changed how they operate</li> </ul>	
<ul style="list-style-type: none"> <li>• Feedback, along with monitoring and evaluation, is an expected norm in philanthropy</li> </ul>	
<ul style="list-style-type: none"> <li>• Foundations and nonprofits are more meaningfully connected to the people they seek to serve and more responsive to their input and feedback</li> </ul>	
<ul style="list-style-type: none"> <li>• Power shifts between constituents, nonprofits, and foundations</li> </ul>	
<ul style="list-style-type: none"> <li>• The people and communities we seek to serve, especially those whose voices are least heard, are better off in ways they define for themselves</li> </ul>	

### 3. BUILD A FEEDBACK FIELD (updated January 21, 2021)

#### **Theory/Hypothesis**

Building individual nonprofit and foundation organizational practices around high-quality feedback loops will not be enough to sustain broad-scale practice change. Additional supports and infrastructure will be required to make this a regular way of working throughout the sector.

#### **Assumptions**

- A field is composed of five components: 1) shared identity, 2) standards of practice, 3) knowledge base, 4) leadership and grassroots support, and 5) funding and supporting policy<sup>1</sup>
- We need feedback to be enough of its own “thing” to be able to get the attention it needs to become a regular practice
- There is not enough research about why feedback is “the smart thing to do”
- Research by itself is necessary but insufficient, and it is unclear how important that research will be to influence nonprofit and foundation behavior
- The existing feedback infrastructure is insufficient to support the mainstream practice adoption we want to see happen with funders and nonprofits

#### **What We’ve Learned:**

- The feedback field is nascent but may be at a transition point away from making the case to building up more tools, resources, and supports for practice
- In general, the field is strongest around shared identity and agreement on values and goals
- In general, the field is less strong related to standards of practice, knowledge base, and funding
- The feedback field is currently fairly defined and confined to a few key actors

#### **How Does This Reflect Our Equity, Diversity, Inclusion Lenses?**

- We are thoughtful about who is involved in developing the standards of practice
- We seek to have our feedback research reflect different points of view and different research teams that bring diversity to the table
- We prioritize investing in BIPOC-led organizations to lead the growth of infrastructure in this field (e.g., instead of just focusing on the typical white-male-led organizational capacity building organizations or measurement and evaluation consulting firms)

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<sup>1</sup> The Strong Field Framework: A Guide and Toolkit for Funders and Nonprofits Committed to Large-Scale Impact. The Bridgespan Group. June 2009. The James Irvine Foundation.

Current and Past Activities	Future Activities
<p>Grants to feedback infrastructure organizations (e.g., Feedback Labs, YouthTruth)</p> <p>Grant to Feedback Labs for six organizations in Feedback Tools Accelerator in Global South</p>	<p>Funding for tools/resources for those promoting standards of practice</p> <p>Promotion and dissemination of tools and practices</p> <p>Participation in field-level efforts to create standards of practice and shared identity</p>
<p>Grants to fund feedback research grants to explore relationship between feedback and outcomes (REDF, IPA, BGCP, CEO, Nurse-Family Partnership, Pace Center for Girls, YouthTruth)</p>	<p>Dissemination and promotion of findings</p>
<p>Shared Insight Gatherings (2016, 2018)</p>	<p>Hold regional gatherings of L4G and other funders, nonprofits, featuring beneficiaries (virtual in 2021)</p>
<p>Train diverse set of technical assistance providers nationwide</p>	<p>Continue training a diverse pool of L4G feedback coaches (L4G)</p> <p>Explore engaging equity consultants on incorporating high-quality feedback as a strategy to advance equity</p>
	<p>Exploration/partnership with like-minded philanthropy change efforts (trust-based philanthropy (MT), Borealis, equitable evaluation initiative (GGP)) to find common ground and build roster of champions</p>
	<p>Explore creating Feedback Champions program in partnership with Feedback Labs (FBL has proposed)</p>
	<p>Engage GuideStar to include feedback as part of core capabilities of nonprofits (MT/VT irritants)</p>
	<p>Get feedback included into assessment frameworks, philanthropy practice surveys (early priority by end of 2021) (RM)</p>
	<p>Education campaign for capacity-building funders</p>
	<p>Communications about feedback as standard practice (e.g., three-legged stool of measurement) (RM)</p>

Current and Past Activities	Future Activities
	Communications to build feedback knowledge base (e.g., case studies, videos, teaching notes, amplify research findings) (RM)
	Support Nonprofit Feedback Field building efforts, support L4G spinout
	Support Foundation Feedback and Listening Practice efforts

	Implementation Markers (Through 2023)	Measurement Sources
1	<ul style="list-style-type: none"> <li>At least 5,000 nonprofits have completed the “How We Listen” self-assessment on Candid by 2021</li> </ul>	Candid tracks and reports
2	<ul style="list-style-type: none"> <li>Feedback Labs has substantively engaged with a diverse group of more than 2,000 organizations, a majority of which are in the U.S., by 2023</li> </ul>	Feedback Labs tracks and reports
3	<ul style="list-style-type: none"> <li>Views and downloads of field-building tools and resources from Fund for Shared Insight’s website grow by more than 15 percent each year</li> </ul>	Dayspring analytics reports
4	<ul style="list-style-type: none"> <li>Annual audience for Fund for Shared Insight presentations at in-person philanthropy conferences and online events increases by at least 25 percent each year through 2023</li> </ul>	Staff tracks and reports
5	<ul style="list-style-type: none"> <li>At least three capacity-assessment tools have incorporated questions on feedback and listening into their core question sets by 2022. (Universe = McKinsey OCAT, TCC Group CCAT, Algorhythm iCAT, Ford OMT, SVP Capacity Assessment Tool, Leap Ambassadors Pillars)</li> </ul>	Staff tracks and reports
6	<ul style="list-style-type: none"> <li>At least two philanthropy field surveys have incorporated questions on feedback and listening into their core question sets by 2022 (CEP, GEO, etc. to research further) (Shared with foundation practice)</li> </ul>	Staff tracks and reports

Short-Term Outcomes (by 2021)	Measurement Sources
<ul style="list-style-type: none"> <li>Close-in network of stakeholders working on U.S. feedback practice across nonprofits and philanthropy coalesces around a greater sense of shared identity, definitions, and goals</li> </ul>	ORS asks
<ul style="list-style-type: none"> <li>At least two-thirds of Shared Insight funding partners make some change in their internal practices related to feedback and listening (e.g., changing site visit, grant application, grant reporting templates; doing the GPR; asking/supporting grantees in feedback beyond L4G co-funding; voices informing strategy development, governance) (Shared with foundation practice)</li> </ul>	ORS evaluation of core and L4G co-funders
<ul style="list-style-type: none"> <li>The network of stakeholders working on U.S. feedback practice becomes larger and more diverse</li> </ul>	ORS asks; attendance at convenings; participation in national field survey
<ul style="list-style-type: none"> <li>Standards of practice are articulated and adopted by key actors</li> </ul>	ORS asks
<ul style="list-style-type: none"> <li>Standards of practice and other key field documents reflect an explicit focus on equity and shifting power</li> </ul>	ORS review of documents
<ul style="list-style-type: none"> <li>High-quality research demonstrates the connection between feedback and better outcomes for clients</li> </ul>	Research results
<ul style="list-style-type: none"> <li>Major infrastructure and philanthropy-serving organizations are increasingly mentioning feedback and listening as an expected practice</li> </ul>	Conference programs, review of websites and blogs

Medium-Term Outcomes (by 2023)	Measurement Sources
<ul style="list-style-type: none"> <li>An increased number of tools and resources aligned with the standards of practice are created and disseminated to increase understanding and acceptance of the standards and promote high-quality practice</li> </ul>	
<ul style="list-style-type: none"> <li>Major infrastructure and philanthropy-serving organizations have adopted feedback as a priority and are promoting feedback as an expected practice in service provision and philanthropy</li> </ul>	



Medium-Term Outcomes (by 2023)	Measurement Sources
<ul style="list-style-type: none"> <li>Feedback and three-legged stool of measurement framework are embraced by evaluators and promoted by leading infrastructure and PSOs</li> </ul>	
<ul style="list-style-type: none"> <li>Knowledge base around the connection of feedback and outcomes is expanded and easy to access</li> </ul>	
<ul style="list-style-type: none"> <li>At least a quarter of Listen4Good nominating funders are engaged in listening and providing capacity-building support for feedback beyond their participation in L4G</li> </ul>	
<ul style="list-style-type: none"> <li>Field-building funding has expanded beyond Shared Insight partners</li> </ul>	

Long-Term Outcomes (beyond 2023)	Measurement Sources
<ul style="list-style-type: none"> <li>The U.S. feedback field is in the networking stage and moving to maturation, as defined by the Strong Field Framework.</li> </ul>	
<ul style="list-style-type: none"> <li>L4G exists as a sustainable part of the nonprofit infrastructure</li> </ul>	
<ul style="list-style-type: none"> <li>A constellation of players is capable of taking on this work and moving it forward</li> </ul>	
<ul style="list-style-type: none"> <li>Knowledge base around the connection of feedback and outcomes is expanded and easy to access</li> </ul>	
<ul style="list-style-type: none"> <li>Funders are increasingly poised as buyers of L4G (added from Val, maybe shared)</li> </ul>	
<ul style="list-style-type: none"> <li>Feedback is recognized as a critical component of capacity-building (added from Val, maybe shared)</li> </ul>	

## 4. EXPERIMENT AND INNOVATE

### Theory/Hypothesis

Feedback loops implemented through Listen4Good are one powerful way for foundations and nonprofits to listen. However, L4G for U.S.-based direct-service nonprofits is not the only way that foundations and nonprofits can meaningfully connect with each other and the people and communities at the heart of their work. Non-direct-service organizations are interested in listening. International organizations are interested in listening. We are interested in exploring other ways to listen and meaningfully connect.

### Assumptions

- The core funders are interested in being emergent and want to explore and experiment with other ways to help foundations and nonprofits meaningfully connect with each other and the people and communities most impacted by their decisions
- We will benefit from having an “R&D” area for our work to test new ideas and ways of listening

### What We’ve Learned

- There is growing interest among foundations around listening to the people and communities most impacted by their decisions
- There is growing interest from international funders about incorporating listening into their work
- In the advocacy/policy space, there are opportunities for funders to build the capacity of nonprofits to meaningfully connect with the people and communities they seek to serve through policy and advocacy that are not about feedback loops
- In the advocacy/policy space, there are opportunities for funders to more meaningfully connect with people and communities that are not about feedback loops

### Criteria for activities to be considered in this category

- Work that is related but doesn’t fit into current TOC
- Right-sized investments (no more than 15% of available grantmaking dollars and human resources are devoted toward all experiments and innovations in this category on an annual basis)
- Goal or pursuing activity would be to learn if it’s something that should become part of the core work going forward
- Core funders should consider walking the walk on this activity
- Pilots by nature, small levels of investment to help us determine future strategies
- Time-limited by nature in experimentation (shorter timeframe)
- Core funders or staff are excited about it (not the key thing in the criteria) *or* could be we pursue an open RFP about other ways of listening
- Consistent with our equity commitment, part of it is about access and power and decision-making

**How does this reflect our equity, diversity, inclusion lenses?**

- It is imperative that the other ways of listening we pursue should focus on helping diverse organizations listen to the voices least heard
- All ways of listening should increase client/beneficiary power

Current and Past Activities	Possible Future Activities
<b>ADVOCACY AND POLICY</b>	
Advocacy/policy scan by Aspen Institute	
Facilitate convenings around advocacy/policy paper findings and implications	
	Pursue grantmaking pilot for advocacy organizations
	Explore participatory grantmaking (Phase III)
<b>INTERNATIONAL</b>	
Ongoing conversations with funders and PSOs globally that are interested in feedback	
Grant to Feedback Labs for a regranting program to support small, international NGOs to do feedback work.	
Articulate Shared Insight operating principles for AVPN, others. Share with AVPN in Summer 2020 (No direct \$ beyond staff time associated with this)	
Launch and support Yad Hanadiv and Van Lear Foundation partnership to use L4G in Israeli maternal health clinics (Those funders will cover the costs)	
Keep in periodic touch with 60 Decibels	
	Meet with USAID – 2020 or 2021

**Implementation Markers:**

- Explore funding in one new area by 2020 (e.g., domestic advocacy work, international direct service work)
- Tripwire: If the advocacy scan shows an opportunity for funders to support/catalyze a different way of listening beyond feedback loops and the core funders that fund advocacy do not commit to adopting this practice, then it is not something we will pursue

**Short-Term Outcomes:**

- Shared Insight has new knowledge/greater clarity about potential expansions areas of work/makes go-no-go decisions about other work ideas

**Medium-Term Outcomes:**

- Shared Insight refines its theory of change based on lessons learned from more exploratory work
- Philanthropic field learns from experiments/others take on potential expansions based on lessons learned

**Long-Term Outcomes:**

## 5. CORE FUNDERS WALK THE WALK

### Theory/Hypothesis

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. We are talking about two things in walking the walk:

- 1) how our funder collaborative works to reflect our values and theory of change
- 2) how individual funders live up to their commitments to have their individual institutions reflect the values and activities in our theory of change.

### Assumptions

- The Shared Insight collaborative of funders is highly influential as a group
- The core funders are highly influential on an individual basis
- A funder collaborative often has freedom to do things more freely and flexible
- We should not be hypocrites
- We will be more successful by engaging in the work of changing ourselves before/as we ask others to change; this may help inform the work in a powerful way

### What We've Learned

- Listen4Good co-funders are drawn to participate in co-funding feedback because of the opportunity to partner with national, high-profile Shared Insight funders
- L4G co-funders say other funders will listen to them because of their affiliation with the Shared Insight funder group
- Sidecar funders typically get involved with funding Shared Insight because of personal relationships with core funders

### How Does This Reflect Our Equity, Diversity, Inclusion Lenses?

- As a funder collaborative, we act in ways consistent with our equity principles
- We give each funder space to elevate its equity, diversity, and inclusion commitments and a safe space to monitor those in a peer context at the core funder meetings

Current and Past Activities	Future Activities
Individual funder commitments around feedback and EDI	Think about the role Gita might play in building the capacity of funders around the table
Commitment to bringing lenses of equity, diversity, inclusion to our Shared Insight work	
Identifying places in our theory of change where our commitment to equity shows up	

Track our progress against our theory of change in these areas where EDI shows up	
Engage Shared Insight core funders in walking the walk (sharing commitments and status at core funder meetings)	
Core funder lunch and learns	
Listen4Good co-funder/grantee meetings	
Core funder dinners including CEOs and local sidecar and L4G co-funders	

**Implementation Markers (all TBD):**

- Core funders have ongoing conversations at core funder meetings about our commitments related to the theory of change and how to turn the lens inward, while acknowledging the diversity of core funders as institutions (e.g., EDI might look different for each, each has a different capacity to participate in Listen4Good)
- Core funders reflect on how Shared Insight and individual core funders’ practices promote meaningful connection with the people and communities we seek to serve
- Shared Insight approaches lines of work with an equity focus; we do the racial equity analysis for our own bodies of work
- Examine our own histories and how race affects our work
- Examine and discuss history of racism and genocide in geographies where we are holding meetings
- Learn from our grantees on EDI
- Don’t ask anything from our grantees that we don’t do ourselves
- Disaggregate our own data (e.g., look at our GPR data, who we fund, etc.)
- Learn from other funders

**Short-Term Outcomes:**

- Shared Insight: Shared Insight staff and consultants build race equity competency; Shared Insight materials, products, processes, and staffing reflect greater commitment to race equity
- Core Funders: Core funders increasingly share about and engage in practices related to feedback in their own work; more core funders speak, present, write, and otherwise influence their peers in this work

**Medium-Term Outcomes:**

- Shared Insight: Shared Insight practices increasingly grow in unconscious competence

- Core Funders: Core funders increase their personal and organizational commitment toward Shared Insight priorities
- Others: Other funders and influencers in the sector know about Shared Insight's lessons learned and journey; other funders are increasingly open to/interested in feedback

**Long-Term Outcomes:**

- Shared Insight: Shared Insight influences other funders and funder collaboratives in modeling and living values of equity, diversity, and inclusion.
- Core Funders: Core funders adopt more practices that align with Shared Insight priorities
- Others: Greater uptake among funders of Shared Insight priorities

## APPENDIX

### **Definition of “the voices least heard”**

Since our founding, Fund for Shared Insight has focused on listening to the voices least heard in order to improve nonprofit and philanthropic practice and, ultimately, improve lives and communities. The phrase "voices least heard" has dual meaning for us. First, it refers to people whom nonprofits and foundations seek to serve, such as families accessing food pantries or free clinics, youth attending afterschool enrichment programs, residents living in public housing, recent immigrants using legal-aid services, or individuals participating in job-training programs. This definition typically excludes intermediaries, such as teachers, volunteers, social entrepreneurs, or others who might help manage, shape, run, or deliver nonprofit programs and services.

Secondly, “voices least heard” refers to people who are the least heard in our broader society due to historic inequality and enduring structural barriers. While nonprofits and foundations should listen to all participants and intended beneficiaries, Shared Insight further prioritizes marginalized groups. This definition includes people of color, people with disabilities, LGBTQ people, people living in poverty, and, depending on the context, others, such as people in rural communities, where structural conditions have isolated or excluded their voice.

We understand that these definitions are complex and evolving, and that our thinking will continue to evolve in service to our overarching goal of better listening as a vehicle to positive and just social change. In fact, in many instances, we are already moving away from the phrase “voices least heard” in order to be more clear about why certain voices have been least heard, putting the onus on those who have traditionally held the most power. For example, you may notice our use of alternate descriptors, such as: the people and communities often least consulted by nonprofits and funders but most impacted by their work.

It is important to note that:

- 1) We do direct grantmaking that prioritizes the voices least heard because this is an underinvested area in our sector
- 2) At the same time, we are building tools that will benefit the broader sector – to encourage feedback across stakeholder groups and make feedback a natural part of what we all do (leveraging our more limited/targeted investment in Listen4Good)

### **Definition of “meaningfully connected”**

"Meaningfully connected" could mean things such as: increased understanding of people's and communities' needs, ideas, and preferences; increased trust with community members and our nonprofit partners who are often in and close to community; increased sensitivity to what matters to people and community; and increased awareness of power dynamics and making efforts to transform them.



**Definition of “more responsive”**

"More responsive" is about changing behaviors. It could mean funders are funding the issues and needs that surface through community input and feedback; including and considering those perspectives in their strategic thinking; or refining their approach to grantmaking. For nonprofits, “more responsive” could mean changing how programs and services are delivered to address feedback received from the people they serve.