

# Project Roles

While we don't anticipate that all elements of our approach would be fully adopted by another funder, below are the roles, phases of involvement, and engagement levels of our initiative that can help you think about yours.

- **Very light engagement:** less than an average of 2 hours/month during the active phases identified
- **Light engagement:** less than an average of 3 hours/week during the active phases identified
- **Medium engagement:** less than an average of 15 hours/week during the active phases identified
- **Significant engagement:** more than an average of 15 hours/week during the active phases identified

Funders			
ROLE	DESCRIPTION	PHASE INVOLVED	ENGAGEMENT
Funders	Contributed to the initiative budget and overall governance of the donor collaborative that housed the initiative; reviewed and approved plans and budgets and each phase of the initiative; participated in learning activities related to the initiative several times throughout the year.	<ul style="list-style-type: none"> <li>• Planning</li> <li>• Design</li> <li>• Grantmaking</li> <li>• Implementation &amp; Learning</li> </ul>	Very light
Committee Members	Funders who sat on Shared Insight's Advocacy/Policy Committee that initiated this work; played an active role during the planning phase; participated in learning activities related to the initiative about every other month; responsible for bringing learning back to their home organizations.	<ul style="list-style-type: none"> <li>• Planning</li> <li>• Design</li> <li>• Grantmaking</li> <li>• Implementation &amp; Learning</li> </ul>	Very light
Committee Co-Chairs	Members of Shared Insight's Advocacy/Policy Committee who were more active and involved with planning this work; met regularly with the project sponsor and project managers throughout the initiative to offer feedback and guidance.	<ul style="list-style-type: none"> <li>• Planning</li> <li>• Design</li> <li>• Grantmaking</li> <li>• Implementation &amp; Learning</li> </ul>	Light
Funder Representatives	One funder representative joined the Design Team as liaison with Shared Insight's funder committee; two funder representatives joined the Grantmaking Group. The funder representatives participated as observers and were charged with bringing their observations and learning back to the funder committee and beyond.	<ul style="list-style-type: none"> <li>• Planning</li> <li>• Design</li> <li>• Grantmaking</li> </ul>	Medium
Project managers and support and support team			
ROLE	DESCRIPTION	PHASE INVOLVED	ENGAGEMENT
Project Sponsor	The managing director of Fund for Shared Insight was responsible for hiring the Consultants and supervising the project under the direction of the Advocacy/Policy Committee.	<ul style="list-style-type: none"> <li>• Planning</li> <li>• Design</li> <li>• Grantmaking</li> <li>• Implementation &amp; Learning</li> </ul>	Medium
Support Team	Support from Fund for Shared Insight and Rockefeller Philanthropy Advisors' team of staff and contractors included grants administration, disbursing payments, communications, design, equity/diversity/inclusion support, logistics, and more.	<ul style="list-style-type: none"> <li>• Planning</li> <li>• Design</li> <li>• Grantmaking</li> <li>• Implementation &amp; Learning</li> </ul>	Medium
Facilitators & project managers	The project managers planned and implemented each phase of the initiative under the direction of the project sponsor. Consultants with expertise in participatory philanthropy and group work served as facilitators and project managers. They were responsible for supporting the Design Team, Grantmaking Group, and Learning Community meetings and asynchronous collaboration. (These roles could be separated.)	<ul style="list-style-type: none"> <li>• Planning</li> <li>• Design</li> <li>• Grantmaking</li> <li>• Implementation &amp; Learning</li> </ul>	Significant

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## Project Roles *(continued)*

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Community members			
ROLE	DESCRIPTION	PHASE INVOLVED	ENGAGEMENT
Stakeholders Consulted	Stakeholders participated in 30-to-60-minute phone/video calls during the Planning and Design Phases. Stakeholders had experience with issues on climate and environment, philanthropic funding flows locally, and community leadership efforts.	<ul style="list-style-type: none"> <li>• Planning</li> <li>• Design</li> </ul>	Very light
Partner Selectors	12 partner organizations deeply embedded in regional work at the intersection of climate/environment and advocacy/policy were invited to select someone from their community to join the Design Team.	<ul style="list-style-type: none"> <li>• Design</li> </ul>	Light
Design Team Members	12 Design Team members with strong connections to their region and climate/environment issues considered key design questions and created a purpose statement for the fund; 11 members continued their engagement during the Grantmaking Phase; several joined the Grantmaking Group.	<ul style="list-style-type: none"> <li>• Design</li> <li>• Grantmaking</li> </ul>	Medium
Nominators	Stakeholders with specific expertise were invited to nominate groups for funding that met the criteria created by the Design Team.	<ul style="list-style-type: none"> <li>• Grantmaking</li> </ul>	Very light
Grantmaking Group members	14 Grantmaking Group members (seven from each region) made decisions about how \$1 million would be distributed in each region; they also communicated funding decisions; some joined the Learning Community.	<ul style="list-style-type: none"> <li>• Grantmaking</li> <li>• Implementation &amp; Learning</li> </ul>	Medium
Grantees	35 groups/organizations participated in the application process and received grants; some joined the Learning Community.	<ul style="list-style-type: none"> <li>• Grantmaking</li> <li>• Implementation &amp; Learning</li> </ul>	Light
Learning Community	Mix of Design Team, Grantmaking Group members, and funders who are interested in exploring the productive tensions in philanthropy; convened once a quarter or so to discuss these issues with an optional in-person gathering.	<ul style="list-style-type: none"> <li>• Learning</li> </ul>	Light