

Fund for Shared Insight

Philanthropy.
Open for improvement.

Our Theory of Change 2016



INCREASING OPENNESS

Increase the extent to which foundations:

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

FUNDING IN COLLABORATION

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





Approximately 80% of Grant Funds

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

Approximately 20% of Grant Funds

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

Collaborative approaches to hearing from the people we seek to help

1

PRACTICE

Advance the practice of using feedback loops to hear from the people we seek to help

2

RESEARCH

Advance the research base to identify how feedback data may be best collected and whether there may be some perceptual and/or experience data that can serve as leading indicators of change

3

FOUNDATION LISTENING & SHARING

Support efforts to increase foundation openness in service of effectiveness

1 PRACTICE

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

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

2 RESEARCH

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

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



FOUNDATION LISTENING & SHARING

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

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

CONTEXT AND ASSUMPTIONS

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

RISKS

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

Source: Valerie Threlfall Consulting. “Landscape Review of the Beneficiary Feedback Field.” December 8, 2013.

Note: Ten to fifteen years ago, there were relatively thick charitable sector infrastructure organizations and many funders. Today, there are many infrastructure organizations (e.g. philanthropy affinity groups) and fewer funders funding infrastructure organizations