

FUND FOR SHARED INSIGHT

# Accomplishments & Reflections

**FROM PHASE THREE 2020-2023**



# INTRODUCTION

Since 2014, Fund for Shared Insight has sought to improve philanthropy by promoting high-quality listening and feedback in service of equity. With three-year commitments among core funders, ORS Impact, the evaluation and learning partner to Shared Insight, takes the opportunity at these junctures to reflect back on overall progress by the collaborative and its partners. In earlier phases (2014–2017, 2017–2020), we primarily looked at progress within key strategy areas. While that befit the earlier stage strategies, after nine years of effort, we are presenting findings around what we are learning about the cumulative effect of Shared Insight strategies on the desired outcomes, as described in Shared Insight’s theory of change. Our hope is that this lays a strong foundation for refining our overall understanding of the theory of change (TOC) as well as giving directional information about where to focus energy, resources, and attention over the next three-year period. In addition to providing an update on outcome progress, we’ll also share reflections about lessons learned and provide provocations and questions we think can help Shared Insight further advance its goal to shift and share power with people and communities, especially those who are often least consulted by philanthropy and nonprofits, to be better off in ways they define for themselves.

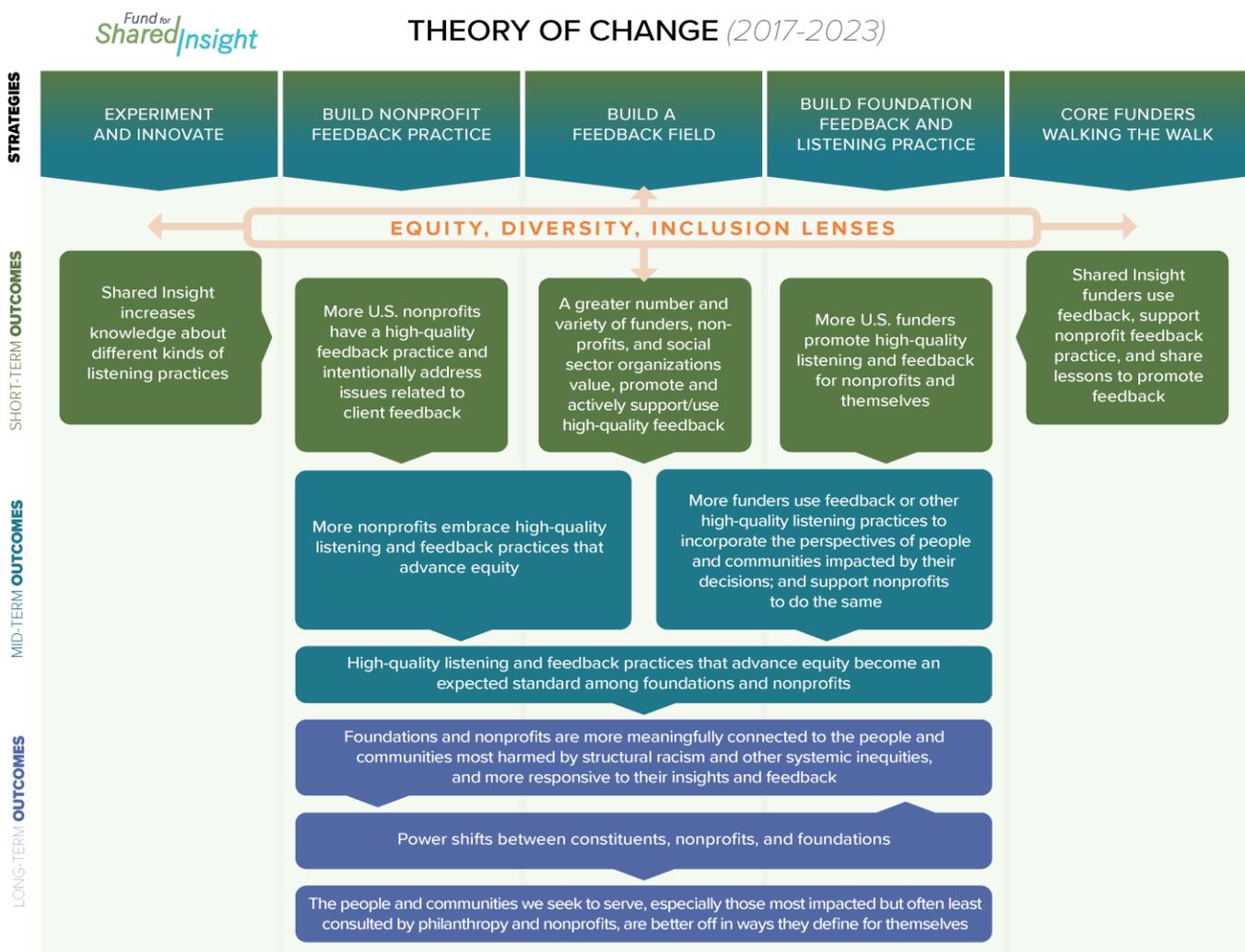
# ROADMAP TO THE REPORT

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# BACKGROUND AND CONTEXT

Since 2017, Shared Insight has operated under the theory of change below, which focused on achieving change as a result of five key strategy areas, each with an equity, diversity, and inclusion lens. To understand outcome progress and lessons learned, it is important to understand the level and type of effort undertaken in this time period, as well as other contextual factors.

**FIGURE 1 | Fund for Shared Insight Theory of Change (2017-2023)**



Over the past three years (2020-2023), Shared Insight has invested approximately \$16.8 million directly in grants and supports<sup>1</sup> for strategies identified in the TOC, in addition to its general operating expenses which support all strategies (e.g., administration, communications, equity, and evaluation consulting). Continuing a trend from past phases of work, Building Nonprofit Feedback Practice continued as the strategy receiving the most support and focus, accounting for around half of direct grants and support expenses. Nevertheless, Building a Feedback Field and Building Foundation Feedback and Listening Practice received a greater proportion of support than in the past, revealing an increased intentional focus on these strategies. Additionally, some of the supports to Listen4Good (L4G), the nonprofit feedback capacity-building program Shared Insight founded in 2015, also reflect a field investment in L4G as core feedback infrastructure, though Shared Insight has tracked those dollars to the Build Nonprofit Feedback Practice strategy bucket. In addition to grants and support, Shared Insight also augmented dedicated staff to support these strategies, further signaling its shift in focus. Finally, Shared Insight allocated \$3.8 million for two main experiment areas: participatory grantmaking efforts and advancing Shared Insight’s mission internationally. Figure 2 summarizes expenses across strategy areas.

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<sup>1</sup> Supports refers to expenses on consulting, honoraria, convenings, and other costs categorized as “program costs” rather than direct grants to organizations.

**FIGURE 2 | Summary of expenses across strategy areas<sup>2</sup>**



<sup>2</sup> This data reflects money actually spent between 2020-2023. There are additional funds approved and earmarked for expenditure that have not been spent yet, so we did not include them in this summary.

In addition to understanding the context of the theory of change and focus of efforts in this period, we must also consider the broader context within which Shared Insight has been operating. This period was indelibly marked by the COVID-19 pandemic and racial justice uprisings of 2020. The racial reckoning created new opportunities and urgency to embed ideas of sharing power, listening, and participation into the philanthropic sector, as it wrestled more and more publicly with its power and position in upholding the inequitable status quo.

We heard from core funders that prior work positioned Shared Insight well to take advantage of prevailing winds during this time, supporting the inclusion of feedback and listening into broader conversations and questions about philanthropy and power. Work shifted from in person to virtual contexts, providing new opportunities to connect with more people in different ways than previously possible. Nevertheless, some challenges did arise during this period. For example, a significant investment toward another large in-person feedback convening was ultimately canceled, which was intended as a large field-building commitment, and “Zoom fatigue” hindered engagement and outreach as everyone switched to virtual platforms for an extended period. Eventually, in-person meetings resumed for the collaborative in the spring of 2022, with a learning journey in Phoenix focused on Native American issues and opportunities. These events and Shared Insight’s ability to adapt and evolve within them are an important part of understanding outcome achievements as we consider how the context of this time provided headwinds and tailwinds relative to efforts and goals.

#### **NOTE ABOUT THE REPORT:**

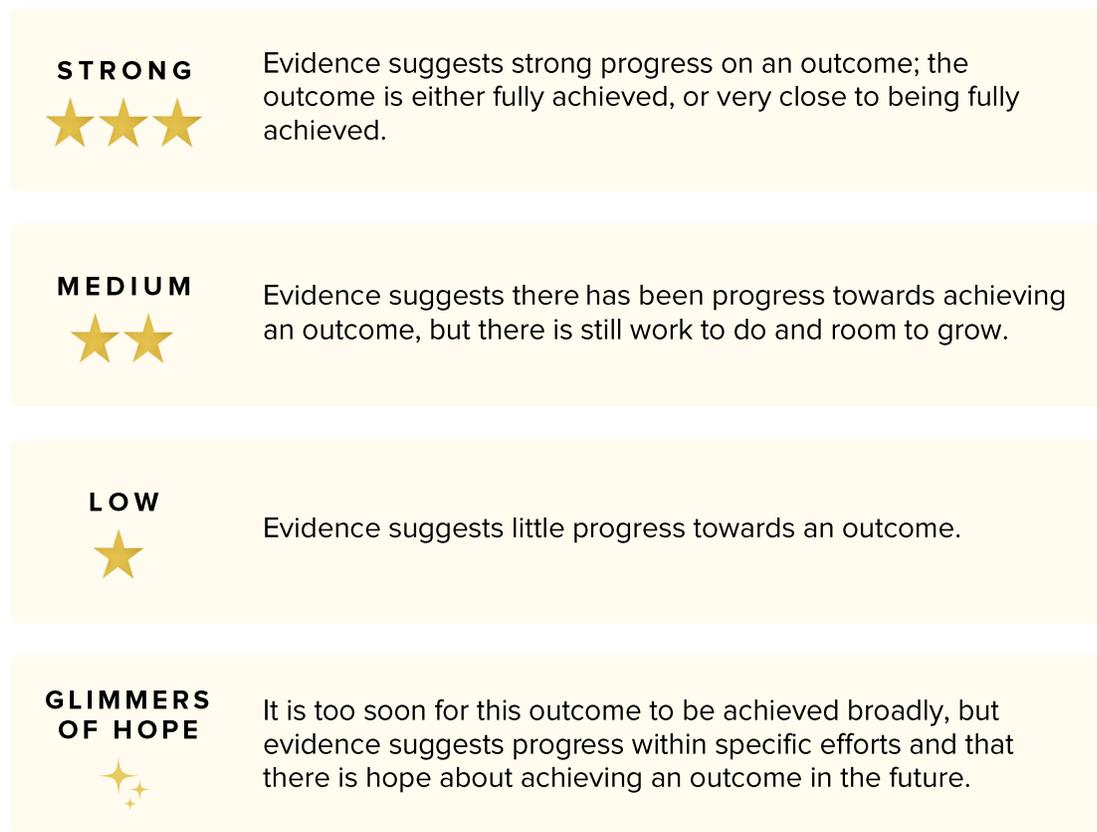
*We provide more details about our data and strengths and limitations at the end of the report, but we think it’s important for readers to know that our assessment around outcomes is from reviews of existing data sources and evaluation products, not an independent, focused evaluative effort at a field level. Here we can posit and reflect on how well the theory of change is holding up—or not—but not definitively speak to the degree to which Shared Insight has contributed or the degree to which these outcomes are true field-wide. We expect to engage in more of that kind of effort in the next lookback, after 12 years of effort.*

*Additionally, our ratings of progress are not based on established targets. They represent our judgment of relative progress since 2020 and a relative sense of their progress compared to the overall outcomes in the theory of change and what seems possible to have been achieved. They are our subjective perspective, given our knowledge of the data and strategy.*

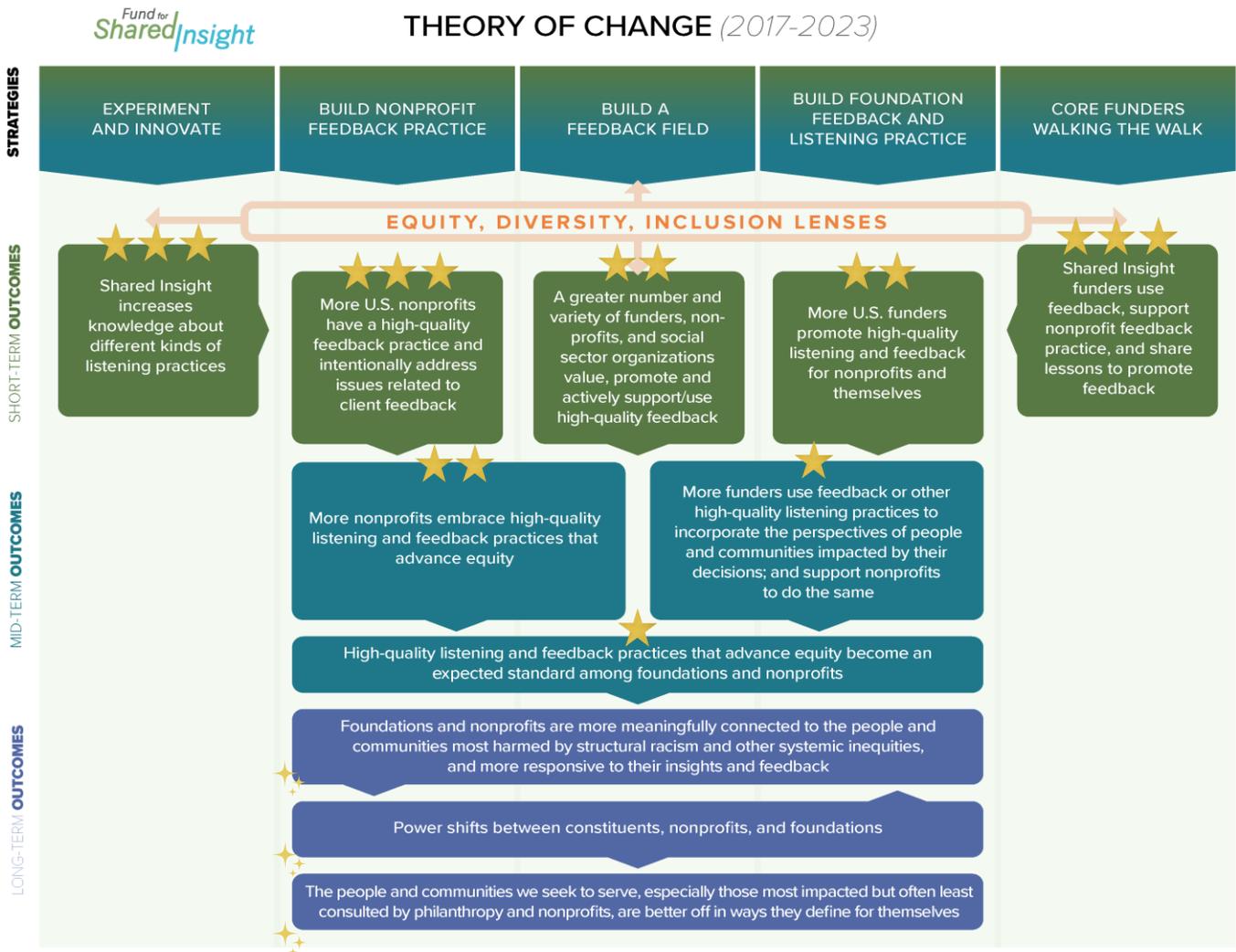
# OVERVIEW OF FINDINGS

For each outcome on the TOC, we have rated the strength of progress we see at the end of this phase of Shared Insight's work. Figure 3 summarizes the rating system we used, while the TOC image below shows our rating for each outcome. The rest of this report describes our ratings and the evidence we have in more detail.

**FIGURE 3 | Visual overview of strength of theory of change outcome**



**FIGURE 4 | Visual overview of strength of theory of change outcome achievement**



**Strong Progress** ★★★★★    **Medium Progress** ★★★    **Low Progress** ★    **Glimmers of Hope** ✨

# PROGRESS TOWARDS OUTCOMES

While the prior summary provides a high-level overview of progress, in this section, we provide more information behind our ratings for the different **short-term**, **mid-term**, and **long-term** outcomes within the theory of change.

## SHORT-TERM OUTCOMES

Unsurprisingly, we see the most progress in this area of outcomes, those that are most proximate to the core strategies and activities of Shared Insight. Following, we cover the outcomes in order of strength of achievement.

FIGURE 5 | Short-term outcome ratings

OUTCOMES FROM THEORY OF CHANGE	STRENGTH OF PROGRESS
1 More U.S. nonprofits have a high-quality feedback practice and intentionally address issues related to client feedback.	STRONG ★ ★ ★
2 Shared Insight increases knowledge about different kinds of listening practices.	STRONG ★ ★ ★
3 Shared Insight funders use feedback, support nonprofit feedback practice, and share lessons to promote feedback.	STRONG ★ ★ ★
4 More U.S. funders promote high-quality feedback and listening for nonprofits and themselves.	MEDIUM ★ ★
5 A greater number and variety of funders, nonprofits, and social sector organizations value, promote, and actively support/use high-quality feedback.	MEDIUM ★ ★

## SHORT-TERM OUTCOME 1

**More U.S. nonprofits have a high-quality feedback practice and intentionally address issues related to client feedback.****STRONG**

We know most strongly that the number of nonprofits working to implement high-quality feedback loops has increased in the past few years. Just within L4G, the number of participating nonprofits has nearly doubled during this phase of work, increasing to a total of 757 unique nonprofit partners to date. Meanwhile, YouthTruth and Feedback Labs have continued expanding their partnerships to support more organizations in implementing feedback loops as well. Finally, as an indicator of practice within the broader nonprofit field, more than 17,000 nonprofits have indicated that they collect feedback from their clients in their Candid.com “How We Listen” section of their organizational profiles, which is an optional feature created as an incentive for nonprofits to think about and work on their feedback practices. While we do not yet have evidence about the quality of these organizations' feedback loops or the degree to which they are intentionally addressing issues related to client feedback, their interest in signaling that it is an established practice for their organization at least suggests attention to the topic and that a practice exists within these organizations. As shown later in this report, we also know from evaluating L4G that the very act of collecting feedback can create virtuous cycles within organizations of culture change as organizations respond to and change because of feedback.

**RATING RATIONALE:**

**STRONG** There is strong evidence that more nonprofits are using high-quality feedback loops both from L4G partners and from the Candid.com “How We Listen” uptake. While more in-depth data across the nonprofit sector would make this assessment more robust, the data available today suggests good progress on this outcome. .

## SHORT-TERM OUTCOME 2

**Shared Insight increases knowledge about different kinds of listening practices.****STRONG**

Shared Insight has supported knowledge development in a variety of ways:

1. **Commissioning, publishing, and promoting research findings:** Shared Insight has funded research projects including the following: (1) A cohort of nonprofits and research organizations (Feedback Research grantees) to explore the connection between feedback and client outcomes, (2) an analysis to uncover which specific feedback practices make up high-quality feedback loops, and (3) research to more clearly understand the connection between feedback and equity. These efforts are bearing fruit, with more time for research to be conducted and shared. For example, from the six Feedback Research grantees, we now have evidence that gathering and responding to high-quality perceptual feedback correlates with better outcomes for individuals, and the act of implementing high-quality perceptual feedback loops in and of itself can lead to better outcomes.
2. **Producing products to inform funder practice:** Shared Insight produced two field-facing toolkits, the [Funder Action Menu](#), identifying different practices that funders can adopt to listen and respond to client feedback and shift and share power with people and communities, and a [Toolkit for Creating More Inclusive Funder Collaboratives](#). These resources are public and available to increase knowledge and influence funder practice.
3. **Learning and sharing learning about different listening practices:** The experiments related to participatory grantmaking and international work identified at the beginning of this phase yielded key learnings, which have nurtured Shared Insight's learning while spurring conversations around power and informing decisions about resource allocation to new strategies.

**RATING RATIONALE:****STRONG**

Shared Insight has commissioned, supported, and shared learnings in a variety of ways and has worked diligently to incorporate those learnings into its own decision making.

## SHORT-TERM OUTCOME 3

**Shared Insight funders use feedback, support nonprofit feedback practice, and share lessons to promote feedback.****STRONG**

Shared Insight recently published the Funder Action Menu, “a resource to help foundations think in a systematic way about how they can promote listening and feedback across the many dimensions of their work.”<sup>3</sup> In 2022, ORS Impact used the Funder Action Menu for the first time to assess how and to what extent Shared Insight core funders are “Walking the Walk”—that is, using and promoting feedback and listening practices within their organizations and among their partners.<sup>4</sup> Compared to past assessments, more core funders gave an increased number of examples of ways in which they and other program leaders in their organizations were implementing practices within the Funder Action Menu.

Specifically, among the nine reporting core funders, we found examples from all the Funder Action Menu categories, with all funders using listening and feedback to inform grantmaking and strategy development. While most feedback used in this way is from grantees, some funders are also using community listening to inform their strategy. The least used practices were convening nonprofits and funders to learn together and listening directly to people and communities (Figure 6). Nevertheless, the scope and extent to which these practices have organization-wide uptake varied across core funders, with some examples suggesting wide uptake and organizational adoption, while others remain siloed within focus areas or specific project teams.

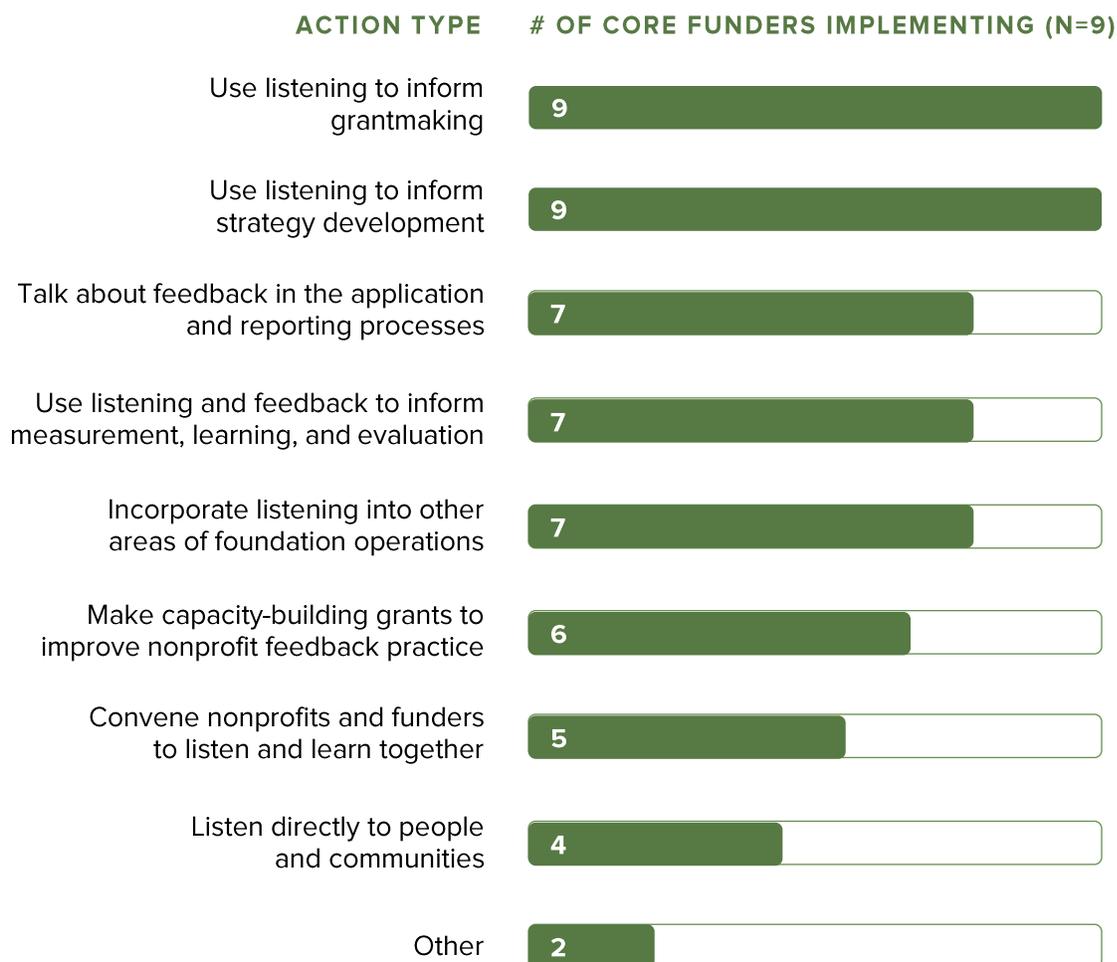
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<sup>3</sup> “Listening & Feedback: A Funder Action Menu”, Fund for Shared Insight. 2022.

<https://fundforsharedinsight.org/get-involved/funder-action-menu/>

<sup>4</sup> Past evaluation efforts asked core funders about their feedback and listening practices more generally, without giving examples of the types of practices they might implement.

**FIGURE 6 | Number of core funders implementing different actions from the toolkit**



In terms of the extent to which Shared Insight has contributed to or influenced these funder practices, three core funders highlighted L4G as a concrete capacity-building option that they could leverage. In addition, Shared Insight influenced how two core funders asked their grantees about their feedback practice and, for one of them, how they analyzed and used that data. Shared Insight also supported core funders by: (1) providing a better definition of high-quality feedback and its importance in the field, (2) elevating the need to include constituent voice in strategy development processes, and (3) providing more precise language to discuss these topics with foundation colleagues. Based on this data, Figure 7 summarizes what we know about core funders using, supporting, and sharing lessons to promote feedback, which are the components of this outcome.

**FIGURE 7 | Summary of evidence of how core funders engage with feedback work**

**SUMMARY OF EVIDENCE OF HOW CORE FUNDERS:**

<b>Use Feedback</b>	<p><b>All core funders</b> use listening and feedback to inform grantmaking and strategy development.</p> <p><b>7 core funders</b> use it to inform measurement, learning, and evaluation.</p>
<b>Support nonprofit feedback</b>	<p><b>Two thirds (6) of core funders</b> “make capacity-building grants to improve nonprofit feedback practice.”</p>
<b>Share lessons to promote feedback</b>	<p><b>Less clear</b> that funders are sharing lessons internally or more broadly.</p>

**RATING RATIONALE:**

**STRONG** All core funders reported examples of multiple actions from categories within the toolkit, and among the nine reporting core funders, we found examples from all categories. These data suggest there is wider uptake than in previous phases around different listening practices and more openness to adopting these practices. The Funder Action Menu also provided and showcased a broader set of useful listening actions that are not limited to feedback, which better shows the variety of actions core funders are taking. However, there are opportunities to expand the scope and organization-wide uptake of these practices.

## SHORT-TERM OUTCOME 4

**More U.S. funders promote high-quality feedback and listening for nonprofits and themselves.****MEDIUM**

The main avenue for funders to promote high-quality feedback among nonprofits thus far has been to fund their participation in L4G. So far, 137 funders have funded nonprofits' L4G participation, with 59 of them supporting multiple organizations and 45 providing funding on a recurrent basis. These data suggest there is sustained interest, at least among this set of foundations, in supporting nonprofit feedback practice. The most direct indicator of funder uptake and promotion outside of L4G funding is an increase in invitations for Fund for Shared Insight to participate in philanthropic conferences: Since 2020, Shared Insight staff have presented in at least 32 sessions, webinars, or conferences with a philanthropy audience. While data on participants at these events is imperfect, Shared Insights communications updates show that at least 900 people participated in these sessions.

At least two other events occurred that suggest funders are paying greater attention to feedback and listening, though we do not have data about whether they are leading to changes in practice: (1) During the COVID-19 pandemic, more than 800 foundations signed a pledge to guide how they would support communities during the pandemic, which included "listening to our partners and especially to those communities least heard," and (2) Fund for Shared Insight has hosted monthly Listening, Learning, & Evaluation sessions, which have seen robust participation from foundation evaluation staff who problem solve and share resources with each other about their own practices and policies around listening and evaluation.

**FOUNDATION COVID-19 PLEDGE:**

*"Commit to listening to our partners and especially to those communities least heard, lifting up their voices and experiences to inform public discourse and our own decision-making so we can act on their feedback. We recognize that the best solutions to the manifold crises caused by COVID-19 are not found within foundations."*

**RATING RATIONALE:****MEDIUM**

While we have some evidence of foundations promoting feedback and listening from L4G funders, invitations and presentations at philanthropy events, and the inclusion of listening in a sector-wide pledge that had momentum during its creation, it is unclear to what extent this is true beyond that limited pool of funders or if there is additional promotion outside of these limited venues.

## SHORT-TERM OUTCOME 5

**A greater number and variety of funders, nonprofits, and social sector organizations value, promote, and actively support/use high-quality feedback.**

MEDIUM



Earlier outcomes detail evidence about interest and uptake among nonprofits and funders. In addition, we have also seen other social sector actors engage in this work. Eight philanthropy serving organizations (PSOs) participated as grantees in Shared Insights' Funder Listening Community of Practice (FLCP 1.0) to collectively explore how to support and influence foundations to listen and respond to clients' feedback. The group has now expanded to twelve funded member organizations (FLCP 2.0). Similarly, a group of infrastructure organizations convened by Feedback Labs, called "the Irritants for Change" which includes organizations like Candid.com and Charity Navigator, have been working to develop incentives for nonprofits to use high-quality feedback practices. Feedback Labs has also convened the Feedback Learning Incentives Group, a group of funders that has grown every year and that has engaged in a concerted and wide-ranging effort to promote feedback, including a blog series with the Center for Effective Philanthropy (CEP) and numerous conference sessions. Other sector-wide evidence of valuing feedback includes greater emphasis on feedback and listening in both foundation and nonprofit conferences, which has expanded to other sectors—for example, the American Evaluation Association (AEA) and the Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA).

Another example of increased interest in the field emerged among the members of the six research partnerships Shared Insight funded as a cohort to explore the connection between feedback and client outcomes. While the research itself shows promising connections between these two concepts, participating organizations also reflected on how they perceive the feedback field changing around them. For example, five of the six nonprofits mentioned that feedback work that helps improve programs is more valued than before, while another highlighted there are more resources and supports for organizations interested in feedback—like L4G and Feedback Labs. Three research partners indicated that they don't have to fight to do feedback work as much as before and that it is more valued and funded in the field. Moreover, two research partners

connected feedback and equity. They reported that what is driving a lot of the change/expectations in how feedback is discussed in the field are equity conversations; specifically, an increased acknowledgment that good research entails engaging the people most directly impacted by the research findings. One specific result of this research cohort was increased synergies among practitioners and researchers. For example, one nonprofit discussed that *“It was very useful to have a community of researchers and nonprofit leaders together thinking through our challenges and opportunities,”* while another shared that as a result of their connection through this cohort, they had partnered with another participating nonprofit on a different research project on participatory research.

This increased participation and attention signals increased value of feedback practices in the field. However, valuing is not the same as promoting or actively supporting and using feedback. Table 1 summarizes what we know about the extent to which different actors in the field (1) value, (2) promote, and (3) actively support or use feedback to date.

**TABLE 1 | Summary of how different actors engage with feedback**

ACTOR	VALUE	PROMOTE	SUPPORT/USE
<b>Nonprofits</b>	Increased use suggests increased value of feedback.	A few nonprofits have engaged in communications efforts with Shared Insight to promote feedback.	L4G and Candid.com data suggest there is increased use.
<b>Funders</b>	Funding for L4G participation suggests increased value among this subset of funders. Participation in Listening, Learning, & Evaluation calls, and invitations to speak at funder conferences increased, suggesting value.	A growing number of foundations have engaged in communications efforts with Shared Insight and Feedback Labs to promote feedback.	95 funders have funded nonprofits’ L4G participation, with 39 funding on a recurrent basis. This includes most (6) Shared Insight core funders.
<b>Other Social Sector Organizations</b>	There was increased activity related to feedback from AEA, ARNOVA, Irritants, FLCP members, and research partners.	There was promotion through activities at conferences, Irritants’ work, and research publications.	Promotion supports use, but this is not widespread practice in the field.

**RATING RATIONALE:**

**MEDIUM** At face value, data does suggest that “a greater number” of organizations are engaging with feedback in different ways. However, there are more signs around value than around promotion and support. We also wonder to what extent the number of nonprofits, foundations, and other social sector organizations feel like “enough” to Shared Insight.

## MID-TERM OUTCOMES

In this section, we provide more information behind our ratings for the different mid-term outcomes within the theory of change, and Figure 8 shares a summary of ratings.

**FIGURE 8 | Mid-term outcomes ratings**

OUTCOMES FROM THEORY OF CHANGE	STRENGTH OF PROGRESS
<p><b>1</b> More nonprofits embrace high-quality feedback practice as a way of listening and are identifying and addressing equity, diversity, and inclusion issues related to client feedback.</p>	<p><b>MEDIUM</b> ★ ★</p>
<p><b>2</b> High-quality feedback and listening practices that reflect equity, diversity, and inclusion considerations become an expected standard among foundations and nonprofits.</p>	<p><b>LOW</b> ★</p>
<p><b>3</b> More funders use feedback or other listening practices to incorporate the perspectives of people and communities they seek to help in their work, identify and address equity, diversity, and inclusion issues to client feedback, and support nonprofits to do the same.</p>	<p><b>LOW</b> ★</p>

## MEDIUM-TERM OUTCOME 1

**More nonprofits embrace high-quality feedback practice as a way of listening and are identifying and addressing equity, diversity, and inclusion issues related to client feedback.****MEDIUM**

Since L4G has been Shared Insight’s main strategy to build nonprofit feedback practice, the most complete data we have about this mid-term outcome come from organizations participating in L4G. While short-term outcomes around practice uptake indicate that a greater number of nonprofits are seeking to improve their feedback practice by working with L4G, evaluation data shows that participating in L4G is, in fact, contributing to improvements for organizations—a majority of L4G’s nonprofit partners report positive impacts on different aspects of their organizations.<sup>5</sup>

- **Capacity gains:** 60% report an increase of at least 1 point (in a 5-point scale) in their ability to collect high-quality feedback.
- **Changes made in response to feedback:** 83% report making changes based on client feedback.
- **Program effectiveness:** 84.5% report that L4G has impacted their programs’ effectiveness.

We also assessed the extent to which organizations were sustaining high-quality feedback loops after their engagement with L4G and found that at least 60% of nonprofits maintain feedback practices (using L4G or other tools) following the conclusion of their engagement with L4G. Moreover, among the 757 nonprofits that have partnered with L4G, 63 of them have returned to participate in the program two or even three times, signaling their commitment to and valuing of a feedback practice.

Regarding the second part of this outcome which relates to “identifying and addressing equity, diversity, and inclusion issues,” we know from [ORS’ research with six nonprofits that participated in L4G](#), that there are clear connections between feedback and equity

<sup>5</sup> Source: ORS Impact evaluation data from a survey of a two-year L4G engagement. **Changes in ability scores** reflect the difference in self-reported ability to conduct feedback-related activities on a survey question at the end of a two-year L4G engagement, compared to organizations’ rating on the same question before they begin their L4G engagement. **Changes made data** reflects the proportion of organizations participating in L4G that indicated making changes in response to client feedback in at least one of four categories by the end of a two-year L4G engagement: program offering, operations, interaction with clients, and providing new services.

and that these organizations are, in fact, identifying and addressing equity, diversity, and inclusion issues related to client feedback. However, it is unclear how widespread this practice is among other nonprofits that are implementing high-quality feedback loops, let alone among the broader nonprofit sector.

### **RATING RATIONALE:**

**MEDIUM** The data above documents the impact(s) that implementing high-quality feedback loops has on organizations, and the extent to which organizations sustain feedback practices. This suggests that organizations are, in fact, embracing feedback practices and using them to improve their organization, their services, and their relationship with clients. It is less clear to what extent feedback work is helping organizations identify and address equity, diversity, and inclusion issues.

#### MEDIUM-TERM OUTCOME 2

**High-quality feedback and listening practices that reflect equity, diversity, and inclusion considerations become an expected standard among foundations and nonprofits.**

**LOW** 

Shared Insight has intentionally adopted a set of equity principles to ensure that feedback loops center clients and equity. L4G's support has intentionally centered equity in its service model, making it a core part of how they engage with partners and the outcomes they hope to see in relation to feedback work. For example, L4G added equity-focused prompts into coaching materials, webinars, and web-based resources, produced multiple thought leadership pieces related to equity, and released a Best Practices Guide that explains the equity-advancing practices organizations need to pursue to shift power to clients as they build their feedback practice. However, as explained in the prior outcome, it is less clear to what extent organizations are using feedback to actually identify and address equity, diversity, and inclusion issues. In terms of feedback becoming an expected standard among foundations and nonprofits, uptake data from the short-term outcomes suggests that there is movement in this direction, albeit to different extents among nonprofits, funders, and other social sector organizations (see Table 1).

**RATING RATIONALE:**

**LOW** The most uptake is perhaps among nonprofits, where we see a greater number of organizations working on feedback, and infrastructure organizations like L4G, Feedback Labs, and YouthTruth have continued to build out tools and resources to support wider adoption. Though more funders and other sector organizations are engaging with feedback, progress feels more nascent. While this data relates to the uptake of feedback practices, it does not shed light on the quality of those practices, particularly regarding equity, diversity, and inclusion. Altogether, we see signs of greater uptake but do not have clear evidence about feedback, particularly in connection to equity becoming an expected standard in the sector.

## MEDIUM-TERM OUTCOME 3

**More funders use feedback or other listening practices to incorporate the perspectives of people and communities they seek to help in their work; identify and address equity, diversity, and inclusion issues to client feedback; and support nonprofits to do the same.**

**LOW** **RATING RATIONALE:**

**LOW** While this is a specific outcome in the TOC, Shared Insight's strategies have not been designed to accomplish this outcome yet. The FLCP strategy and core funder uptake of listening practices have been the two main ways to make progress on this outcome thus far. While there is work under way and reason to be more optimistic about funder change moving forward, evidence is limited at this time.

## LONG-TERM OUTCOMES

Unsurprisingly, we have less data the further down the outcome chains we go. In part, it takes time for earlier outcomes to lead to later outcomes, such as “foundations and nonprofits are more meaningfully connected to the people they seek to help and more responsive to their input and feedback” and “power shifts between constituents, nonprofits, and foundations.” However, some focused inquiry gives us some glimmer of hope that these outcomes can be achieved, hence our rating.

- Within the L4G nonprofits, ORS conducted an inquiry around whether and when feedback contributes to nonprofits’ efforts to understand and address inequities their clients face, as well as how organizations leverage feedback and listening practices to share power, giving them more control over resources and decisions.** [In ORS’ research with six nonprofits participating in L4G](#), we found that organizations have shifted from having power over to building power *with* clients and that feedback and listening contributed to those practices. While feedback doesn’t automatically make organizations more equitable, we found examples of how feedback can serve as a catalyst, mirror, and compass in thinking about equity issues. For example, we found organizations have established client advisory boards; created new avenues for existing client advisory boards to operate, learn, and inform the organization; and developed staff positions and job descriptions with client input.
- The participatory grantmaking initiative sought to create a process that put a lot of design and decision-making power into the hands of those most impacted by climate change.** While the Design Team and Grantmaking Group felt connected to each other and had positive experiences, we also heard that power hadn’t shifted significantly or enough. Participants knew that meaningfully addressing climate change and its impacts on communities would require more, and they still felt confined to a transactional experience. It wasn’t that the power to make decisions about money didn’t matter but that it wasn’t enough.

These examples suggest that it is *possible* that feedback and participatory processes can lead to meaningful connection and start to address power. However, they by no means *guarantee* that such processes will result in such outcomes. As the conversation with those involved in the participatory grantmaking effort showed, expectations around what sharing and shifting power looks and feels like is variable and may be felt differently among those within a process.

# REFLECTIONS & PROVOCATIONS

Given our long term and deep partnership with Shared Insight, in this section we offer some overarching observations and reflections, as well as pose some questions and raise issues we think Shared Insight should continue to wrestle with in its next three-year phase.

## OVERALL REFLECTIONS ON THE PAST THREE YEARS

**In this period, equity, diversity, and inclusion (EDI) felt like it became much more embedded, less “bolted on.”** Shared Insight did not start with an explicit focus on race equity and shifting power. In the intervening years, there has been work and added support to more meaningfully and fully embed equity, diversity, and inclusion “lenses” within all aspects of the work. For example, Shared Insight developed a set of [Principles and Practices for Advancing Equity](#), based on the foundational understanding that equity is essential to any definition of “high-quality” feedback. The [Listening4Equity](#) page makes this commitment public by sharing these principles and practices, along with L4G’s equity guide and other related resources. While in the past we sometimes had to look hard to find glimmers of progress in EDI work, it feels more naturally occurring within all strategies and audiences. Of course, EDI work is a journey that is never complete, so there are also areas of opportunity. Figure 9 shows some examples.

**FIGURE 9 | Examples of progress and opportunities for EDI****EQUITY**

**Some signs of progress:** Signs of progress in this space entail more natural and consistent consideration of how decisions, resources, and ideas can contribute to equitable outcomes. For example, L4G has embedded equity into all its curricula and coaching, has shifted to intentionally promote feedback as a tool to advance equity, and is developing an equity fund. Shared Insight has also adopted a set of equity principles. However, equity is about opportunity and outcomes, and we don't yet know if these changes in practice have resulted in more equitable outcomes for the people and communities at the heart of Shared Insight's work. For example, while L4G's efforts to embed equity considerations across all its curricula and coaching is a change, we don't yet know what that means for equitable outcomes among the people served by nonprofits who use L4G. Shared Insight invested resources in learning for the participatory grantmaking initiative at the request of grantees in ways that do not relate to or advance any of our intended outcomes, shifting the power to define the agenda and providing support to this group.

**Potential opportunities:**

Is there more Shared Insight can do to support, lift up, and highlight those who are doing work within communities and are reflective of those priorities and voices already, versus those that are aspiring to listen and shift? Is this a place to use communications/voice differently—not making the case but highlighting successes/promising stories? There is also opportunity to sharpen understanding around how power shifting is an essential part of equity, not a concept separate from or in addition to values of equity.

**DIVERSITY**

**Some signs of progress:** Shared Insight and L4G have diversified their staffs, and grantees in portfolios like the Funder Listening Community of Practice (FLCP) and participatory grantmaking reflect more diverse staff, leadership, and communities than in the past.

**Potential opportunities:**

The core funder table itself is notably not particularly diverse in membership. In addition, there could be efforts to ensure nonprofits that have historically received less investment are not left out of opportunities for building feedback practice and capacity building.

**INCLUSION**

**Some signs of progress:** The participatory climate initiative had strong inclusion around the design process and the grantmaking decisions, and it also provided additional supports to grantees, as requested, to participate fully. In the FLCP, there have been opportunities for PSOs to help define areas of interest in the analysis of member data and how they could connect, align, and coordinate across their own efforts.

**Potential opportunities:**

There continues to be talk about whether there are more inclusive ways for Shared Insight to “Walk the Walk” around decision-making at the staff and core funder table—for example, through an advisory board that represents a broader range of interests (e.g., smaller funders, people providing feedback, etc.).

**Build Nonprofit Feedback Practice continues to be the area with the strongest results, in part likely because of greater levels of investment over time.** As noted in prior reports, Building Nonprofit Feedback Practice—and particularly L4G—has received many resources and benefited from a strong strategy, and we continue to see the fruits of that over time. Early investments in the development of and support for field-level organizations to strengthen practice have made strides, with the expectation of a successful spin-off for L4G as an independent organization with a growing demand for its fee-for-service offerings. Early and ongoing work to focus on quality and equity continue to be strong pillars within the work for L4G and others. In contrast, Build Foundation Feedback and Listening Practice has received fewer resources and staffing, and was less built out than Building Nonprofit Feedback Practice, which likely relates to seeing less evidence of progress in this area. It is also true that the incentive structures and lines of accountability between funders and their support organizations differs meaningfully in a funder change strategy than between funders seeking to change nonprofits.

**While not specifically called out as stand-alone outcomes in the theory of change, we do see signs of progress in the field of Nonprofit Feedback Practice.** Build a Feedback Field as a strategy has gained more focus and effort during this period than when the theory of change was created in 2014; we see some evidence of shifts in the field, such as advances around vision, standards of practice, and leadership, which we see as indicators of the short-term outcome, “A greater number and variety of funders, nonprofits, and social sector organizations value, promote and actively support/use high quality feedback.”<sup>6</sup> Feedback Labs has embraced its role in building a field, and other organizations noted previously continue working to advance a vision, standards, and incentives for enhancing nonprofit practice. We’ll also note this progress occurred despite the need to shift away from the large-scale convening originally planned for 2020, which was canceled because of the pandemic. While the strategy implicitly suggests these are valuable and important outcomes, they aren’t explicitly named in the theory of change or rated in the prior content. We still see them as worth noting and celebrating as important signs of progress, even if our assessment of progress relative to “feedback and listening practices become an expected standard” as low.

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<sup>6</sup> Core elements of a field taken from the Strong Field Framework: <https://irvine-dot-org.s3.amazonaws.com/documents/64/attachments/strongfieldframework.pdf?1412656138>

**There is a different sense of focus and momentum around Build Foundation**

**Feedback and Listening Practice than in prior years.** While it might be easy to feel cynical or disappointed about the slower rate of progress around foundation practice change over the past 9 years, we do see signs of forward momentum compared to past years. We see this partially as a timing issue: Efforts during this time to work on foundation practice change are longer-game efforts, and it feels premature at this stage to know what the payoff will be. Additionally, as noted in prior reports, Build Foundation Feedback and Listening Practice has received fewer resources and staffing than, for example, Building Nonprofit Feedback Practice. Activities such as communications/presentations/webinars, the convenings of funders at major philanthropic conferences, and the facilitation of working groups of peer positions within foundations (e.g., bringing together evaluation and learning officers through the Listening, Learning, & Evaluation Group) can help plant seeds and create more openness to other efforts. The FLCP spent time making sure that different PSOs could learn from each other and get smarter about how to embed listening, feedback, and equity into their work rather than jumping into tool development and programming as independent, competitive organizations. Even core funders shared being more open and more willing to think about where and how they might use a broader array of practices within their foundations than seemed to be true previously. Some of this may be a result of a broadening of focus and terminology to include more diverse ways to listen to grantees and communities from a narrower focus on feedback and supporting nonprofit practice. Some of this is likely the prevailing winds of the sector that have been generally pushing philanthropy to think about its power and positionality differently than in years past. From our perspective, we think there is room for hope and patience in these next years to see the fruit of the efforts currently underway.

**It is unsurprising to see more progress in short-term outcomes than in mid- and long-term ones at this point in time.**

As noted in the introduction, this report has shifted from focusing on looking at the amount and quality of efforts in the core strategy areas to taking a bigger picture view of the cumulative effects of Shared Insight's work toward the outcomes it seeks to achieve. Given the early focus and investments, it is heartening to continue to see signs of progress among nonprofits and core funders. We also think the data showing that meaningful connections and power shifts can occur are heartening. We think this current assessment of progress, as well as a reflection on how change is currently sought and into the future, will provide a good opportunity to revisit starting assumptions about how change happens in the

philanthropic sector and refine the theory of change for 2023 through 2026 to define how success will be determined over the next three-year phase.

## PROVOCATIONS

**With an expected shift to a field focus around nonprofit practice going forward, we see a few considerations to think through.** The efforts of the last few years have supported more uptake among nonprofits, with higher quality and intentionality around feedback as a tool to help advance equity. Additionally, investments in the field and sector infrastructure should help sustain the energy and momentum in this area. While this progress is notable and exciting, it's also clear that there is still further opportunity for greater uptake of high-quality feedback that advances equity within the nonprofit sector. We want to raise up a few areas of consideration for the future:

1. Current feedback field effort approaches tend to favor direct service nonprofits. Is that sufficient? Is more support needed to reach nonprofits that work on systems and policy change?<sup>7</sup> And given that systems change nonprofits potentially bear some similarity to funders in having a less direct relationship with those they seek to benefit, are there ways to leverage lessons and tools from the foundation practice side to support this space?
2. How will the field more broadly think about reaching and supporting less-resourced nonprofits? Are we inadvertently reinforcing historic patterns of underinvestment in nonprofits led by people of color?<sup>8</sup>
3. The current model to help nonprofits listen is most geared to the nonprofits who are least like the communities they seek to serve. Grassroots organizations, organizing organizations, and organizations created and led by those with lived experience, who may also likely be people of color, may be left out, either because the language and tools don't resonate and/or their expertise and ways of engaging are undervalued. To what degree can/should Shared Insight and the feedback field

<sup>7</sup> Shared Insight's efforts to address feedback and nonprofit advocacy organizations resulted in a framework for the field and then morphed into the participatory grantmaking initiative.

<sup>8</sup> Dorsey, C., Kim P., Daniels, C., Sakaue, L., & Savage, B. (2020, May 4). Overcoming the racial bias in Philanthropic funding. *Stanford Social Innovation Review*.

<https://ssir.org/articles/entry/overcoming-the-racial-bias-in-philanthropic-funding>

expand how “quality” and “practice” are defined to be inclusive of alternative (non-white dominant) ways of being and doing this work?

4. Finally, in prior years, there has been discussion about the degree to which government could be a meaningful driver of practice change among nonprofits, far beyond the impact of philanthropy. While this was tabled during the last administration, it seems worth reconsidering, both as a strategy and the degree to which the influence, connections, and clout of this table could be a meaningful lever to support the field actors.

**Is Walking the Walk a value or a strategy?** It has been a shift over the six years to have more of a strategic focus on the adoption and uptake of practices among core funders. While we have seen some progress in this area, there have also been observations among staff and Core Funders that Walking the Walk as a concept has had mixed success. There is the desire or value to be willing to do what we recommend to others, and there is some question about a potentially implicit assumption in our theory of change to date that larger, mostly national funders will influence the field or other funders if they take up and promote these practices. Do the core funders think this influence strategy is important, meaningful, and relevant? If yes, should there be more or different support in this area? Would different people be involved (e.g., foundation CEOs)? Or should efforts to engage in this work as individual funders just be part of overall efforts to change foundation feedback and listening practices writ large?

**How do we ensure Shared Insight’s work serves as a tool for transformation?**

As we know from the “glimmers”, it is possible to see feedback and participation result in meaningful connections and some shifts in power. At the same time, we feel compelled to mention that there is a risk that this work inadvertently reinforces an inequitable status quo, allowing nonprofits and funders to feel like they are listening but never grapple with consequential questions around power: When does listening happen? Who is heard? Who gets to make meaning? Who decides how to respond? Who gets to decide what change is enough? How do we help funders and nonprofits wrestle with real questions around how to blend and benefit from different types of expertise? How does this not become a tool within the nonprofit/philanthropic industrial complex that could seek to perpetuate itself, not achieve justice and equity? Changing power dynamics—how nonprofit professionals and funders see their roles, hold their power, and engage with those they seek to support—is not a small technical

change; it represents a large mindset shift around what kind(s) of expertise is important and valued and what the role and longevity of the social sector should be. We think there are opportunities for further thinking and reflection on these questions as we decide on the next steps forward with Shared Insight's theory of change for its work in Phase IV: 2023 through 2026.

## CONCLUSION

Shared Insight is in quite a different place than when it began in 2014. After nine years, early investments are revealing tangible signs of success, and the next three years offer a runway to see through places where focus and investments have been more recently ramping up. It is a ripe time for the collaborative to consider what foundation they stand upon and what they want to see accomplished. We hope this reflection back on the theory of change and overall strategy as a whole helps you find places in which to feel pride and accomplishment, identify where more or different might be needed, and continue to focus on how to best live into equity, diversity, and inclusion in how the work is done as well as the results that are achieved.

# APPENDIX

## Data Sources

- Core funder meeting binders (July 2020 – November 2022)
- Fund for Shared Insight Operating Budget (November 2023)
- Prior evaluation reports:
  - [Some Lessons from Participatory Grantmaking and Meditations on Power for the Field](#)
  - [Feedback and Equity: Connecting the Dots](#)
  - [Feedback Sustainability: Feedback Practice One Year After Listen4Good](#)
  - [Fund for Shared Insight: Accomplishments & Lessons Learned 2017 – 2020](#)
- Listen4Good evaluation survey data (updated from results originally presented in [The Listen4Good Journey So Far](#))
- Listen4Good monitoring data
- FeedbackLabs monitoring data
- Core funder interviews conducted in January 2023
- Feedback research grantee interviews conducted in January 2023

## Strengths and Limitations

All evaluations make tradeoffs, and this three-year lookback is no exception. As noted previously, we had a rich array of different documentary evidence and prior evaluations to leverage. Additionally, as embedded partners to the collaborative, we have insights and perspectives since nearly the inception, upon which to reflect on progress and areas of slower progress. At the same time, these assessments of outcomes do not come from a specific inquiry to assess the sector or field writ large; most of our data are more narrowly focused on Shared Insight’s efforts and partners, limiting our ability to provide a more accurate field- or sector-level assessment. Our ratings are likely better thought of as directional than definitive. We have tried to note where we have more and less certainty based on data and where we do not know enough to make a defensible rating. Additionally, while our connection over time gives us more nuanced understandings of the work, the tradeoffs, the intentions, and the hopes, we do know that we are part of the “water” of this work; we think our desire for Shared Insight’s ultimate success and for the organization to achieve its goals allows us to be clear-eyed in our analysis, support, and critique, and we acknowledge that there

are likely ways that some types of bias are still present (e.g., confirmation bias, availability bias). We have sought in our synthesis to use techniques to mitigate bias (e.g., looking for disconfirming evidence, remembering what we do not know, devil's advocacy).<sup>9</sup>

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<sup>9</sup> Beer, T., & Coffman, J. (2014, May). *How shortcuts cut us short: Cognitive traps in philanthropic decision making*. Center for Evaluation Innovation. [https://www.evaluationinnovation.org/wp-content/uploads/2014/05/CEI-Cognitive\\_traps\\_in\\_Philanthropy.pdf](https://www.evaluationinnovation.org/wp-content/uploads/2014/05/CEI-Cognitive_traps_in_Philanthropy.pdf)

