

Fund for Shared Insight Overall Evaluation Design 2014-2017: Overview

March 2015

Shared Insight presented an initial set of questions in the RFP for the evaluation. The framework and set of questions below have been refined as a result of conversations with the evaluation sub-committee, the initial RFP grantee selection process, and our experience in this area. Evaluative efforts for Shared Insight can be grouped into three main types:

- Learning about feedback loops and openness;
- Learning about Shared Insight as a funder, as a collaborative, or as an actor itself related to feedback loops and openness; and
- Learning that deepens understanding of the ecosystem within which Shared Insight operates to support decision-making.

Evaluative Focus	Area	Questions in this area should help Shared Insight...
Learning about feedback loops and openness through the work	Strategy	understand the degree to which sector-level change occurs within the timeframe of Shared Insight as a result of the cumulative set of efforts, assuming goals stay the same while the means to those goals may change over time
	Clusters	understand impact and lessons learned across sets of grants
	Grants	understand results and lessons learned at the individual grantee organization level
Learning about how Shared Insight works	Partnership	document and model openness about lessons learned of the work of the collaboration
	Communication <i>(formal and informal)</i>	understand the impact and refine level and types of communications activities
	Grantmaking	hone its grantmaking practice
Learning about the ecosystem within which Shared Insight operates	Context	inform strategic or other decisions along the way as new questions are raised, strategic choices need to be made, or evaluative information could otherwise support decision-making that is not directly connected to Shared Insight grantmaking or other activities

Prioritized Questions by Area

Area	Questions
Strategy	<ul style="list-style-type: none"> a) What are the ways the broader social sector is trying to improve philanthropy, and to what degree is that aligned with Shared Insight's focus areas? b) What is the amount and nature of public conversation and dialogue related to feedback loops, and how does it change over time? c) What is the current state of understanding, norms, and practice of beneficiary feedback loops in philanthropy, and how does it change over time? d) What is the current prioritization and how much openness is practiced within foundations, and how does it change over time?
Clusters	<ul style="list-style-type: none"> e) What can be learned about assumptions made when funding each cluster? f) What are the bright spots within each cluster? What does this suggest about emerging tailwinds? What are barriers or challenges being faced within the cluster that could inform Shared Insight about headwinds or barriers within each cluster? g) What synergies are occurring within or across clusters?
Grants	<ul style="list-style-type: none"> h) What amount of effort are grantees producing? i) Where are individual grantees seeing success related to their processes and their outcomes? j) What are they learning about their area of work that could be useful to Shared Insight efforts? k) How and to what extent are grantees influencing other organizations (non-profit or philanthropic)?
Partnership	<ul style="list-style-type: none"> l) When and why and how is Shared Impact having an influence beyond the funded work of grantees? m) What impact does sidecar funding have on the scope of Shared Insight? What is the impact on sidecar funding institutions? n) To what degree is modelling of philanthropic practices of openness known or recognized? What impact does this modelling have? o) How effectively has the collaborative been implemented? What lessons could be shared with the field from this collaborative effort?
Communication (formal and informal)	<ul style="list-style-type: none"> p) What kinds of communications are generating the most activity/interest? q) Has Shared Insight communication with broader audiences been (a) well-received and (b) seen as a catalyst for generative dialogue about foundation practices?
Grantmaking	<ul style="list-style-type: none"> r) Do grantees feel that they are treated fairly and with respect? Has back office administration been adequate to enable high quality and responsive behavior from Shared Insight?
Context	<ul style="list-style-type: none"> s) Who/what organizations are influencing philanthropic practice? To what degree are these influencers "championing" Shared Insight's priorities? t) What efforts related to feedback loops or openness moved forward in the field among qualified applicants who did not receive funds from Shared Insight?

Data Collection and Reporting Timeline Overview

DC = Data collection
R = Reporting/Deliverable

	2015	2016	2017	2018
January	Strategy baseline data collection DC	<i>GPR for grantees</i> ; media analysis DC	<i>GPR for grantees</i> ; media analysis DC	<i>GPR for grantees</i> ; media analysis; strategy follow-up data collection DC
February	Strategy baseline data collection DC	Bellwether interviews conducted; analysis of grantee reports; interview grantees DC	TBD; interview grantees DC	Strategy follow-up data collection; interview grantees DC
March	Share results of strategy baseline data collection R	Results shared R		
April	Share information with FSI R	Share information with FSI R		
May				
June				
July	Interviews with influencers, media analysis DC	Media analysis DC	Media analysis DC	
August				
September				
October	Share results from grants and clusters R	Share results R		
November	Share information with FSI R	Share information with FSI R	Interview grantees DC	
	Interview grantees DC	Interview grantees DC		
December		Core funder interviews DC	Core funder interviews DC	