

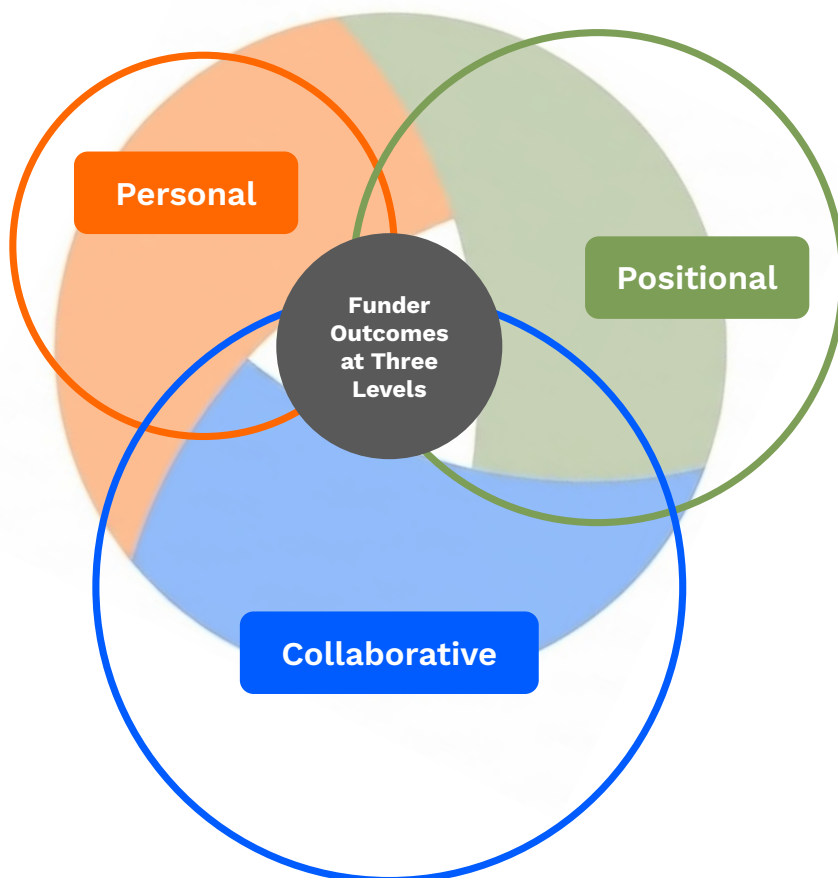
For Collaborative Funds: A Framework for Funder Learning, Impact, and Outcomes

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Collaborative funds bring together multiple funders or donors who pool their funding behind a shared goal. The way a fund engages its donors shapes how much they give, how they give it, and how committed they stay. Strengthening that engagement isn't an end in itself, it's how funds move more money and better support their fields.

Co-developed by Philanthropy Together and the seven collaborative funds of the Network of European Foundations, this framework sets out three levels of funder outcome and the practices that produce them. It draws on structured interviews and a workshop with forty funders and fund leaders connected to NEF.

The framework focuses solely on the donor side of a collaborative fund's work. It is not intended as a complete monitoring, evaluation, and learning framework for the fund's grantmaking or other impact work as a whole.



Personal: what shifts for the individual donor/funder in how they understand the field, the issue, and their own role?

Positional: what changes inside the funder's philanthropic institution across their strategy, grantmaking, or practice? If an individual donor, how does it connect back to their family office or other philanthropic efforts?

Collaborative: what shifts across the broader field as a result of their participation in the collaborative fund? What can we do together that we couldn't do alone?

Using the Framework & These Worksheets

The pages that follow set out two inventories of practices collaborative funds may uniquely offer donors, each listed as a checkbox for easy review:

- What practices, offerings, and approaches deepen funder commitment, engagement, and desired outcomes?
- What desired outcomes do we seek for, by, and through funders in the collaborative fund?

Three ways to review and discuss internally with your collaborative fund's team:

1. **Current practice:** Check each item your fund is currently doing or pursuing, to better understand the range of offerings and outcomes.
2. **Aspirational practice:** Check each item your fund would *like* to be doing, to surface ambitions and identify gaps.
3. **Status review:** Discuss what is working well (+), what is not working or hasn't shown traction (-), and what your fund is exploring or hoping to achieve (Δ). This produces a fuller view of where practice is mature, where it is faltering, and where experimentation is underway.

Once you've discussed the lists and added new ideas unique to your collaborative fund, use the summary table on page 7 to consolidate your discussions into a funder engagement plan. At the end, you should have a single-page articulation of how donor learning, engagement, and ultimate impact align within your fund to both direct staff activities and use as a discussion tool for new and existing funders.

NEF's Collaborative Learning Day working to refine this framework



Photo Credit: François de Ribaucourt

What practices, offerings, and approaches deepen funder commitment, engagement, and desired outcomes?

PERSONAL

Peer-to-Peer Exchange (funder ↔ funder)

- ☐ Peer dialogue and exchange
- ☐ Informal scans across funders ("who's doing what")
- ☐ "Chatham House" confidential space
- ☐ Structured disagreement, not just polite dialogue
- ☐ Sensemaking support between foundations on the strategy

Proximity to Grantees and the Field

- ☐ Site visits with grantees
- ☐ Workshops or roleplaying to step into the lived experience of the grantees
- ☐ Mixed convenings or forums (small/fund-level)
- ☐ Engaging with grantees as teachers/thought partners
- ☐ Reviewing RFP proposals together giving exposure to breadth of field
- ☐ Sustained personal connection with individual grantees over time

Content & Knowledge Inputs

- ☐ Field & issue briefings for funders (closed or open beyond donor members)
- ☐ Guest speakers pushing thinking/understanding
- ☐ Library of documents and reports

Facilitated & Designed Learning

- ☐ Open reflection questions (surveys)
- ☐ Sensemaking sessions with learning partners
- ☐ Relevant, timely learning sessions with a specific goal

1-1 Relationship with the Collaborative Fund

- ☐ Introduction calls between the funder and the leadership/team of the collaborative fund
- ☐ Welcome packet when joining the fund
- ☐ Informal "I'm in town let's get coffee" meetings with fund leadership
- ☐ Annual or more frequent 1-1 calls with fund leadership

POSITIONAL

Decision-making and Governance Roles

- ☐ Selection committee participation
- ☐ Governance roles & partnership charters
- ☐ 50/50 funder-to-ecosystem decision-making models or other similar participatory models
- ☐ Working groups (fundraising, advocacy, MEL, etc)
- ☐ Reciprocal accountability practices baked into the partnership agreement

Strategic Input and Methodology

- ☐ Co-shaping strategy for the fund
- ☐ Experiencing participatory practices first hand

Pooled Infrastructure

- ☐ Strong operational practices
- ☐ Using common reporting templates across all funders
- ☐ Shared due diligence between funders on grantees
- ☐ Pooled expertise (shared MEL, comms, learning staff)
- ☐ Pipeline sharing (passing rejected-but-strong grantees back to funders' own portfolios)

Translating Learning Back into the Institution

- ☐ Comms, strategy tools (e.g. pitch decks/memos) to bring insights back to colleagues, leadership, and board
- ☐ Member spotlights, grantee spotlights, newsletters that double as assets to be shared internally

COLLABORATIVE

Cross-issue Exchange

- ☐ Cross-collaborative forums and gatherings bringing together donors + civil society orgs + ecosystem partners

Joint action and capital movement

- ☐ Joint fundraising and shared donor outreach
- ☐ Aligned or direct funding opportunities outside the pool (not everything has to go through the collaborative)
- ☐ Advocacy and collaboration across funds

Field Intelligence and Foresight

- ☐ Ecosystem & systems mapping
- ☐ Foresight and scenario planning work
- ☐ New field-wide research ("civic intelligence")

Public-facing Field-building

- ☐ Public advocacy and narrative work
- ☐ Publicizing funder testimonies
- ☐ Donor networking on the side of sector conferences

Sector Leadership

- ☐ Partnerships and pushing on with sector leaders/conveners (e.g. Philea)
- ☐ Joining alliances or networks of funds
- ☐ Connecting to global field catalysts (e.g. Philanthropy Together)

What desired outcomes do we seek for, by, and through funders in the collaborative fund?

PERSONAL

Knowledge & Insight

- ❑ New field knowledge and sense of trends
- ❑ Challenged assumptions and skepticism
- ❑ Deeper understanding of where there are opportunities to make change
- ❑ Talent development/funder staff growth because of participation

Mindset & Mental Models

- ❑ New mental models for funding social change (intersectional, systemic)
- ❑ Shift from instructional to experiential learning posture
- ❑ Change in mindset/confidence about the collaborative fund itself

Identity & Posture as a Funder

- ❑ Expanded view of own role beyond moving money
- ❑ Recognizing and activating power, not just being an informed donor
- ❑ Confidence to surface questions, concerns, uncertainties
- ❑ Moving from transactional to transformed over time

Relationships & Connection

- ❑ Human connection to grantees and the issue
- ❑ Trust and relationships across and between funders in the collaborative
- ❑ Feeling less alone in the work, more shared burden and collective sense-making

POSITIONAL

Grantmaking Practice Changes

- ❑ Grantmaking shifts: longer-term, more flexible, trust-based, lighter reporting burden for grantees
- ❑ Risk-mitigation practices integrated
- ❑ Trust-based practices integrated into how the funder works overall
- ❑ Greater appreciation of non-grantmaking work (ecosystem curation, civic intelligence, relational infrastructure)
- ❑ Funding longer-term, more flexibly, with more intersectional understanding

Strategy & Framing Adopted Internally

- ❑ Adoption of the fund's systems map or framework as the institution's own strategy or grantmaking priority
- ❑ Charter for collaboration adopted internally
- ❑ Documents, methods, tools brought back to home institution

Programmatic Expansion

- ❑ Foundation funds areas it didn't before (e.g. advocacy, specific geography, thematic expansion) as a result of multi-year exposure
- ❑ Pipeline expansion for funders to discover new grantees through open calls that the institution then funds directly

Operational Benefits

- ❑ Reduced staff time spent searching for grantees
- ❑ Cross-program coordination inside funder institution because of participation

Deepened Commitment to the Collaborative

- ❑ Deeper institutional commitment and retention
- ❑ Increased funding commitments over time

COLLABORATIVE

Capital & Funding Flows

- ❑ More (new) capital mobilized through the collaborative fund into the field
- ❑ More (new) capital mobilized beyond the collaborative into the field (directly to grantees or other means)
- ❑ New mechanisms to mobilize funding through the collaborative
- ❑ Influence on philanthropic sector investment levels
- ❑ Power dynamic disruption between funders and grantees
- ❑ Reimagined funding flows to specific issues

Practice Spread Across the Field

- ❑ Replication of practices in other ecosystems
- ❑ Trust-based practices spreading beyond pool members
- ❑ Reduced reporting burden field-wide

Narrative & Mindset Shifts

- ❑ Field-level narrative shift
- ❑ Redefinition of what scale means ("scale is influence, not just budget")

Recognition & Thought Leadership

- ❑ Collaborative fund recognized as leading voice / thought leader (increased partnerships, speaking engagements)
- ❑ Visibility for the collaborative through press, newsletter, website, social

Political, Policy, Field-wide Impact

- ❑ Diversified impact by funding a broad set of grantees
- ❑ Political space opened on contested issues
- ❑ Sector infrastructure / norms / common practices that benefit the broader philanthropic sector
- ❑ Share back learnings within the collaboratives to the broader field

Sample Learning & Evaluation Questions

The final part of this framework is a list of sample questions you might use to engage your funders/donors in a structured conversation or survey to better understand their motivations, alignment, connection, engagement, and ultimately what has changed for them by being part of the collaborative fund.

How to use these questions:

1. *Review each category and pick 1-2 questions that feel most relevant to your desired learning goals.*
2. *Tailor the wording or drop down responses to your collaboratives' unique context and learning goals.*
3. *Check back against the outcomes and tactics work on the previous pages to refine or add additional questions that are relevant for your unique funder/donor framework and plan.*

1. Motivation & Identity

- What's the core reason you joined this fund? (*open ended or multi-select of your funds' specific value proposition such as learning, influencing, experimenting, etc.*)
- Which best describes how your foundation sees this fund today? (*select one*)
 - A grantee we support with an "add on"
 - A learning community we participate in
 - A strategic vehicle we co-own
 - An experiment we're watching
- If we shut down tomorrow, what would your foundation lose that it can't easily replace? (*open*)
- What's the story you tell *inside your foundation* about why this fund matters? (*open*)
- What did you assume about this fund before joining that turned out to be wrong? (*open*)

2. Strategic Fit & Alignment

- How does our collaborative fund's strategy fit within your larger funding strategy? Is it complementary or distinct?
- On a scale of 1–5: how central is this fund to your foundation's strategy in this issue area? (*Likert*)
- Does your participation here free you up to take more risk elsewhere?
- If your board reviewed this fund tomorrow, what would they say is the strongest strategic justification? The weakest? (*open*)
- Has being part of this fund made your foundation's own strategy sharper or unchanged? (*Likert*)

3. The Collaborative Advantage

- What is the added value of a collaborative fund to your foundation? (*open*)
- What does a successful collaboration between a collaborative fund team and a funder look like to you? (*open*)
- What's something you learned here that you *couldn't* have learned by funding alone? (*open*)
- Rank these value propositions collaborative fund's provide from most to least important to you: (*ranking*)
 - Pooled capital and scale
 - Risk-sharing
 - Access to expertise / staff capacity
 - Peer relationships with other funders
 - Field-level intelligence
 - Access to grantees and movements
 - Legitimacy and brand
 - Outsourcing decision-making
- What are the pain points you experience being part of this collaborative fund?
- Name one moment from your involvement in the collaborative that it achieved something no single funder could have. (*open*)
- Is the value you get here higher, lower, or about what you'd get from a comparable solo grant of the same size? (*select*)
- Who needs to be educated within funding institutions about the role in collaborative funds, and how do we do so concretely? (*open*)

4. Donor Learning & Transformation

- What does learning and impact mean to you?
- Walk us through one thing you now believe about this issue that you didn't believe [X] years ago. What changed your mind. (*open*)
- What experiments, lessons learned, or failures have been the most generative for you in your own practice?
- Has anything about being in this fund made it harder to do your job? (*open*)
- Which of these has shifted for you through participation in the collaborative? (*multi-select based on your collaborative's work, e.g.:*)
 - *How [I / my foundation] defines impact*
 - *Who [I / my foundation] thinks of as an expert*
 - *How [I / my foundation] makes grant decisions*
 - *How [I / my foundation] thinks about risk*
 - *How [I / my foundation] thinks about our role in the ecosystem*
 - *My/my foundation's understanding of the field*
 - *My/my foundation's relationships with key leaders / organizations*
 - *How much we're willing to fund in this area*

5. Practice Change

- What has changed in the way you do things because of your participation in a collaborative fund? (*open*)
- Which of the following have you adopted broadly within your philanthropy as a result of being a part of this collaborative fund? (*multi-select, for example:*)
 - *Multi-year core grants*
 - *Trust-based / unrestricted funding*
 - *Participatory grantmaking*
 - *Simplified due diligence or reporting*
 - *Capacity-strengthening / "Funding+" approaches*
 - *Intersectional issue focus granting*
 - *Grantee feedback loops*
 - *Using collaboratives and other intermediaries as a strategy*
- Name a specific idea, approach, practice, policy, or process inside your foundation that exists because of this fund. (*open*)
- What have you tried to bring back to your foundation that didn't land well internally? Why? (*open*)
- How does learning from this fund travel inside your foundation and where does learning get stuck? How could we help you best so it doesn't get stuck? (*open*)
- Who else at your foundation knows what you know from being in this fund? (*select all: just me / my team / leadership / board / nobody really*)
- What have been the barriers to your own learning and engagement? (*multi-select*)
 - *Time / capacity*
 - *Touchpoints didn't match how I learn/engage*
 - *Content felt too operational, not strategic*
 - *Content felt too strategic, not tactical enough*
 - *Discussions felt distant from my foundation's work*
 - *The right people from my side weren't in the room*
 - *Honest conversation wasn't possible*

6. Engagement, Touchpoints & Experience

- Which touchpoints and offerings do you find most beneficial? (*Choose top 3 or stack rank list of items your fund offers, e.g.:*)
 - *Steering committee meetings*
 - *Annual reports*
 - *Site visits*
 - *Grantee convenings*
 - *Peer calls with other funders*
 - *Thematic workshops / webinars*
 - *Informal 1:1s with the fund team*
- Out of everything we offer, what is least valuable to you (and your foundation) that you think we should stop doing? (*open*)
- What should we start, stop, and continue doing? (*open*)
- What data points from grantee reporting is most useful to you? What are we collecting that isn't meaningful? (*open*)
- How much time do you estimate spending as part of the collaborative? Is that more or less than desired? (*open*)
- What's the right cadence for meaningful engagement (select quarterly, twice a year, monthly) (*drop down*)
- Is there someone else at your foundation who should be in this conversation but isn't? Who, and why aren't they? (*open*)
- Rate the quality of the peer relationships this fund has helped you build with other funders, on a 1–5 scale. (*Likert*)
- Rate the quality of the field relationships this fund has helped you build with grantees and organization leaders, on a 1–5 scale. (*Likert*)

7. Field & Systems Impact

- How have you experienced the fund's impact on the wider field in the last [X] years? (*open*)
- What's a shift in the field that wouldn't have happened (or would have happened slower) without this fund? (*open*)
- Where else are you hoping to see systems impact that you haven't yet? How do you suggest we modify to achieve that goal? (*open*)
- What is your foundation's level of ambition in terms of political influencing and advocacy? (*open or Likert*)
- Is this fund [braver / bolder] than your foundation? (more brave, less brave, or about the same? (*select + why*))
- On a 1–5 scale: how much political/reputational risk is your foundation willing to take through this collaborative fund that it wouldn't take on its own? (*Likert*)

8. Commitment, Renewal & The Future

- On a 1–10 scale: how likely are you to recommend this collaborative fund to a peer funder/donor? (*Net Promoter Score*)
- What would have to be true 3 years from now for you to renew at a higher level? (*open*)
- Where do you see this collaborative fund in the next 5 years? (*open*)
- What's the one thing we could change in the next 12 months that would make the biggest difference to your commitment and engagement in the fund? (*open*)

PERSONAL

POSITIONAL

COLLABORATIVE

INPUTS:

What practices, offerings, and approaches deepen funder commitment, engagement, and desired outcomes?

OUTCOMES:

What desired outcomes do we seek for, by, and through funders in the collaborative fund?

INDICATORS:

What and how are you tracking?
What learning questions are you asking?