



Implementing a Big Bet or an Enduring Commitment: Guiding Questions

Initially, the elements of strategy first developed in the Thinking phase are further defined during Implementing through the development of:

- Deeper analysis and documentation of the landscape, including findings from the literature and other experts, an understanding of other funders and organizations in this space, and external factors.
- Deeper analysis and documentation of our approach, including priorities for the role of the Foundation, the activities and approaches the Foundation will use, key assumptions, intended outcomes and intended impacts.

Many questions to consider for implementing Big Bets and Enduring Commitments are similar; at some points in this guidance, questions differ depending on the type of strategy being implemented.



Products resulting from these guiding questions include: Core Strategy Documents; TheLoop and public website content; 18-Month Work Plan; Budget.

Products informed by these guiding questions include: Documentation of Reflection Sessions; Scheduled Reviews documents; Evaluation and Learning Design; Communications Plan

Guiding Questions

Deeper Analysis of the Landscape

External Context

- Is this problem/opportunity situated within a larger system or set of systems?
 - What is/are the system/s?
 - How is it organized? Who are the key players?
 - How does it operate? If the problem/opportunity is situated within a set of systems, how do these systems relate or interact?
 - What are levers for change within the system(s)?
- What external factors might be expected to impact the context and alter the landscape positively or negatively? What should we track or monitor among the salient external factors?
- What assumptions are we making about the landscape? What known and unknowns do we presume to be true?

Related Work in the Field

- Is there a relevant body of literature (policy, research, analysis), and what does it say?
- What has already been done related to this problem/opportunity? What interventions have been tried? What has worked, and what has not? Why?
- Are there knowledge gaps that need to be addressed?

Relevant Actors and Organizations

- Who are the experts in the field for this problem/opportunity, and what is their approach?
- Which organizations are working on this problem/opportunity, and what are they doing?
- Who are the other funders in this space, and what is their niche?
- Are there other potential actors/grantees whose work affects this problem/opportunity?
- Are there capacity gaps that need to be addressed related to this problem/opportunity?

Analysis and Documentation of the Foundation's Strategy and Theory of Change

MacArthur Goal

- What is the goal for the work? Is it: specific; aspirational; stated in active voice; clear on intended results; anchored in a space (e.g., global, regional, geographic, field, etc.) and time? For TheLoop, the goal should be formatted as follows: Verb (Big Goal achieved) by/through _____

Hypotheses and Assumptions

- What is your hypothesis for achieving the MacArthur goal?
 - What are the selected **approaches** (and alternative approaches) to addressing the problem/opportunity? Why have these approaches been selected: what criteria were used, what assumptions are being made about how change works, and how are approaches hypothesized to work together?
 - What are the assumptions and expectations regarding the **Foundation's role** in engaging on this issue (e.g., the Foundation may choose to engage as a direct change agent, a catalyst for change, or to seed the change, etc.)? Is leverage necessary for success in this field, and who are potential partners?
 - What **paths were considered but not taken**, and why?
 - **What do we not know** about our pathway to change (e.g., about the field, what works, etc.)?
 - What **other assumptions** are being made about how change will happen? Is the strategy sensitive to key externalities such as elections, a global treaty, new legislation, regulation passage, etc.?

Approach, Activities, and Budget

- What specific **activities** are required to achieve that change?
 - What is the scope of the work? This should include intended target audience, geography, potential investment, and timeline?
 - How do we prioritize our point of entry and choices for maximizing our impact? This should include a preliminary examination of costs, risks and sensitivities.
 - What expertise and capacity is necessary for the Foundation and for grantees to be part of these required activities?
 - What is the rationale for the portfolio of grantmaking or programmatic activities?
 - What is the relationship of this work to existing work within the Foundation? What has been learned in other areas about these approaches or programmatic activities that is being applied?
 - Are the approaches feasible; non-overlapping; aligned with proposed grants; logically related to outcomes and impacts?
- Given this landscape and set of activities, how do you think about budgeting from the bottom up to solve the problem? How many dollars will you keep flexible for emergent opportunities, and why?

Outcomes and Impacts

- What will be different as a result of this strategy? What will be the intended outcomes? Are outcomes: formatted to illustrate geography/category/space where they will be observed; measurable; logically related to approaches; directly related to our contribution; demonstrating what we expect to achieve by when?

Big Bet Questions:

- What are the intended impacts of this strategy? Are impacts: measurable; able to show trends expected over time; aligned with approaches and outcomes; inclusive of aspirational indicators of change?
- What are the indicators for measuring the strategy's progress and results over time?

Enduring Commitment Questions:

- How do these outcomes relate to the incontrovertible value?
- How will these outcomes advance our longstanding interest in this area?
 - o What are the impediments to achieving success?
 - o What are possible unintended consequences associated with implementing this strategy?
 - o What are logical timepoints at which to assess the strategy's progress?
 - o Are there known conditions that would suggest an exit, pivot, or other significant change in the life of the strategy?

Considering Risks

- How might this strategy affect the reputation of the Foundation?
- Does implementation of this Strategy touch upon areas of law or regulatory frameworks (e.g., lobbying, advocacy work, copyright, re-granting, etc.) that might compromise the Foundation or grantees?
- Is there a chance that this strategy will place grantees or the public in harm's way?
- How might the success or failure of this strategy affect the field?
- Will this strategy affect current Foundation grant-making? If so, how?
- Are there other risks associated with implementing this strategy not captured in the above questions?

Learning

- What are the initial learning questions the Foundation has about the strategy, theory of change, assumptions, activities, and other issues considered in strategy development?
- When and how will the Foundation learn from the strategy to support Design/Build efforts?