To: Fay Twersky, Lindsay Louie, and Colleagues of the Effective Philanthropy Group
From: Valerie Threlfall
Re: Landscape Review of the Beneficiary Feedback Field
Date: December 8, 2013

The beneficiary voice (or feedback) field is grounded in the general premise that for the social sector to be most effective, it should gather feedback from those clients, constituents, or beneficiaries whose lives it seeks to impact and integrate these individuals' perspectives into providers' (broadly defined) decision-making. The motivation for gathering this input can vary. Some argue from a moral perspective – that the power dynamics the sector seeks to overcome are reinforced if providers do not to proactively seek out the opinions of the people they are trying to help. Others point to growing evidence that integrating beneficiary feedback can lead to more effective programs. A recent Bridgespan article documents that "integrating constituent perspectives about what works in their contexts (let's call this 'local knowledge') with what has been learned from broader evidence and experience ('technical knowledge') has sometimes led to better programs and greater impact."[1]

Indeed, in sectors such as health and education, there have been multiple projects that have successfully demonstrated the relationship between beneficiary perspectives and social outcomes.[2] While the causal link between beneficiary feedback and program effectiveness still requires exploration across subsectors, the mounting evidence base is leading some to suggest that gathering beneficiary feedback "is not only the right thing to do, it is the smart thing to do."[3]

But feedback for whom? Beneficiary feedback can be gathered to inform decision-making at two levels: the nonprofit provider working directly with the clients or beneficiaries and/or the funder or philanthropic community supporting the nonprofit providers.[4] As described later in this paper, efforts to capture beneficiary voice – while still limited – have been much more common at the nonprofit level. To date, there has been little demonstrated interest among funders to integrate beneficiary feedback into decision-making.

The Hewlett Foundation commissioned this paper to better understand the current state of funders' efforts to learn from beneficiaries within the United States and to explore how

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[1] Forti, Matthew and Willa Seldon, *From Input to Ownership: How Nonprofits Can Engage With the People They Serve to Carry Out their Missions*, The Bridgespan Group, August 2013.
[2] For example, the Gates Foundation's Measures of Effective Teaching Project affirmed that "student perception surveys provide a reliable indicator of the learning environment" and that "teachers' student survey results are predictive of student achievement gains." The Bill and Melinda Gates Foundation, *Ensuring Fair and Reliable Measures of Effective Teaching: Culminating Findings From the MET Project's Three Year Study,* 2013, and *Asking Students About Teaching*, 2012.
[3] Twersky, Fay, Phil Buchanan, and Valerie Threlfall, "Listening to Those Who Matter Most, the Beneficiaries," *Stanford Social Innovation Review*, Spring 2013.
[4] This does not mean to suggest that benefits do not accrue to beneficiaries themselves through the experience of providing input, which is often the case. Rather, it focuses on whose behavior we primarily seek to inform.

foundations could more effectively integrate beneficiary feedback into their work. This paper will:

- Provide a brief history and overview of the beneficiary feedback field;
- Highlight some of the key initiatives and developments in the space;
- Describe headwinds and tailwinds shaping this opportunity; and
- Suggest some potential paths forward to advance foundations' efforts to learn from beneficiary feedback.

OVERVIEW OF THE BENEFICIARY FEEDBACK FIELD

While the concept of constituent engagement is certainly not new, the idea of systematically gathering beneficiary perspectives to inform performance is a concept that only got popularized in the social sector within the past twenty years or so. Multiple forces have provided momentum for the development of the beneficiary feedback field including the nonprofit sector's increased commitment to performance measurement – particularly 'outcomes' based measurement – and the advancement of the consumer feedback movement within the for-profit sector. Leaders of the beneficiary feedback field frequently point to the transformational effect that the systematic collection of consumer feedback had on the auto industry and the impact of companies like JD Power as a source of inspiration. These proponents believe that beneficiary feedback can have an analogous transformative effect on the social sector – not only in elevating the voices of the consumer but also enabling better decision-making on the part of nonprofits and funders. "Feedback data is an early indicator of change taking place and can be triangulated with other evidence of results to enrich [providers'] understanding of what is happening."[5]

The earliest efforts to capture and respond to beneficiary feedback were concentrated in the international development and international aid fields, but there have been more recent experiments across the health, education, and human service sectors in the United States. Selected US nonprofits have been highlighted for their focus on their beneficiaries – including Family Independence Initiative, Harlem Children's Zone, Nurse Family Partnership, YouthBuild USA, and Youth Villages. However, no one has publicly documented the specific components of these organizations' data collection and feedback efforts. There have been a few scaled experiments domestically that have gathered beneficiary feedback across multiple organizations, including a 2009 project by the Alliance for Children and Families and the Center for Effective Philanthropy's (CEP) YouthTruth® Project. While infrastructure organizations like Great Nonprofits and Keystone Accountability also exist to advance the cause of beneficiary feedback, these efforts remain relatively small. As a result, the beneficiary feedback field can still be characterized as nascent and in an experimental stage. As further described below, however, there are signs that the field may be poised for near-term growth.

Field Level Challenges

One persistent question challenging the field is why beneficiary feedback hasn't become a more routine part of the nonprofit sector's operations – particularly given the proliferation of

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[5] Keystone Accountability, *The Really Busy Person's Introduction to Constituent Voice*, 2013.

consumer feedback tools and expectations in the for-profit sector? Before making virtually any purchasing decision, big or small, most of us, acting as consumers, want to understand other customers' experience. However, these same expectations do not exist within the nonprofit sector. The primary difference lies in the fact that the beneficiaries of nonprofits are generally not the "payors" for services – donors or foundations are. "The focus [thus] shifts more toward the requirements of who is paying versus the unmet needs and aspirations of those meant to benefit."[6] Unacknowledged biases may also be at play as some in the field may believe "that beneficiary feedback is less valuable or objective than the opinions of grantees or donors," particularly when it comes from groups lacking power like youth or low-income individuals.[7]

Another ongoing issue for the beneficiary feedback field is around vocabulary and definitions. People describe beneficiary voice using a range of terms including "beneficiaries," "clients," "constituents" or even "citizens." Each of these terms has its own lexicon and connotes different ideas about gathering feedback.[8] Given that "the terminology used in the field is not standardized, [it] leads to confusion of purpose, ideas, and hence conclusions."[9] Compounding this, beneficiaries cannot be easily identified across all of the issue areas that make up the nonprofit sector – who are the beneficiaries of environmental or arts programs, for example? This inability to precisely and consistently define who we are seeking feedback from often makes it hard to advance discussions of beneficiary feedback – particularly at the funder level – beyond the theoretical.

Bridgespan cites a few more pragmatic challenges in its recent article, including that "it's hard to know if you're engaging constituents effectively" and "the entirely reasonable fear that the more constituents are involved in the process, the longer it will take to get things done."[10] Finally, people struggle with how to use the data gathered and reconcile beneficiary feedback with other sources of performance data.

Until recently, lack of infrastructure and tools were also thought to be key limitations. However, technology developments such as SMS messaging have changed the landscape significantly. In addition, there is a growing repository of tools such as surveys or guides in development. While these tools need to be made more readily available, the methods are increasingly in place.

But, many thought leaders including David Bonbright of Keystone Accountability argue that the biggest deficit is the lack of market incentives to capture and respond to feedback. In health and education – potentially two of the ripest issue areas for exploration given the relative ease of reaching their beneficiaries – beneficiary feedback is only now becoming more accepted as it is being factored into into teacher performance and provider quality assessments. Planned efforts

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[6] Stid, Daniel. "The power of seeing things from the beneficiary's perspective." The Bridgespan Group blog. Posted July 28, 2011. Retrieved August 27, 2013.

[7] Threlfall, Valerie. "Listening to Beneficiaries: Why Are We So Bad At It?" The Center for Effective Philanthropy blog. Posted September 22, 2011. Retrieved August 27, 2013.

[8] Many people eschew the term "beneficiary" as they believe it undermines the power that recipients of nonprofit services have, and prefer to use "clients" or "constituents."

[9] Jump, Laura, "Beneficiary Feedback Mechanisms: A Literature Review," Development Initiatives, April 2013.

[10] Forti, Matthew and Willa Seldon, *From Input to Ownership: How Nonprofits Can Engage With the People They Serve to Carry Out their Missions*, The Bridgespan Group, August 2013.

to integrate beneficiary feedback into nonprofit ratings systems – such as the anticipated improvements to Charity Navigator described below – subsequently hold promise for the field.

NOTABLE INITIATIVES AND FUNDER-LEVEL ACTIVITY

As stated previously, many of the most advanced beneficiary feedback experiments are concentrated in the international development, aid and relief sectors. In the US, there are a handful of current projects that include funders as a potential audience and have the potential to reach significant scale. What follows are descriptions of these multi-organizational initiatives and a summary of some recent notable developments in the field. Appendix A catalogues many other projects around the globe (although this should not be considered an exhaustive list).

YouthTruth® – Created in 2008 by CEP with support from the Bill & Melinda Gates Foundation, YouthTruth is a national student survey program that seeks to translate student feedback into actionable data and insight to help districts, schools, and teachers improve. The project was initially designed with funders as a primary audience; however, there has been less interest from funders relative to the demand from schools and districts. Since 2008, YouthTruth has collected perspectives from more than 250,000 students from 300 schools across 35 districts and networks nationwide. YouthTruth leverages comparative data at multiple levels to inform clients' interpretation of student feedback.

Success Measures – Started by Neighborworks America, Success Measures is a participatory outcome evaluation resource designed to help community development organizations, intermediaries, and their philanthropic and public sector partners plan and conduct assessments and evaluations. Success Measures' methodologies explicitly involve stakeholders and leverage a suite of 122 vetted indicators and 312 data collection instruments to measure a wide range of contextual, perceived and observable changes in individuals and communities.

Charity Navigator 3.0 (CN 3.0) – Launched in January 2013, CN 3.0 will incorporate five results measures into Charity Navigator's ongoing assessments of nonprofit organizations. One of these results measures is focused on constituent voice and "whether and how well a charity collects and publishes feedback from its primary constituents." By 2016, Charity Navigator hopes to gather beneficiary feedback for all of the nonprofits on its site and incorporate these assessments into its ratings.

The following recent efforts to incorporate and elevate beneficiary voice are also worth noting:

World Bank – In late 2012, the World Bank created the Global Partnership for Social Accountability (GPSA). GPSA's objective "is to improve development results by supporting capacity building for enhanced beneficiary feedback and participation." To achieve this, GPSA "will provide strategic and sustained support to beneficiary groups and civil society organizations (CSOs) in developing countries that are working with their governments to promote greater transparency and accountability."[11] GPSA has been seeded with $20 million from the World Bank and is seeking additional partners and funds.

[11] www.worldbank.org.

Keystone Accountability –Keystone is arguably the leading public advocate for beneficiary feedback within the nonprofit and philanthropic sectors. Keystone provides fee-for-service consulting to organizations seeking to build constituency voice into their model and has a number of field-level experiments underway. These include GroundTruth, which is a close-to-real-time feedback system for gathering data from recipients of humanitarian aid that features a publicly available index comparing providers' results. In addition, Keystone is piloting the Feedback Commons, a repository of beneficiary feedback tools and indexes that will allow organizations to easily build feedback surveys and then benchmark their results with peer organizations within their field.

Feedback Labs – Started in 2013 and led by Dennis Whittle, former CEO of Global Giving, Feedback Labs is a virtual collaboration of eight international nonprofits that are committed to the vision that citizen and beneficiary voice should be the norm. Their goals are to share lessons learned across participating organizations, support experiments to close the feedback loop with constituents, and advocate for greater commitment to constituent feedback across the nonprofit sector. Feedback Labs plans to increase its audience by adding different levels of engagement or membership for domestic nonprofits and funders. Currently, feedback labs has an active blog presence at: feedbacklabs.org.

Foundations' Efforts to Listen to Beneficiary Feedback

There are very few examples of independent funders engaged in actively listening to beneficiaries in a rigorous or systematic way to inform their own work.[12] Many foundations make some rudimentary efforts to listen to beneficiaries through site visits or occasional meetings or convenings. In addition, foundations will occasionally incorporate beneficiary surveys or focus groups into larger program evaluations. More common, albeit still not pervasive, is for foundations to support efforts by grantees to gather and incorporate beneficiaries' perspectives into the grantee's own work. In a 2011 survey of foundation CEOs by CEP, only 27 percent of responding foundations affirmed that they included beneficiary opinions in some way in their own performance assessments.[13]

That said, there are signs that there may be growing interest among funders to explore this topic. In January 2013, CEP included questions about beneficiary feedback in a survey administered to full-time CEOs of independent, community and health-conversion foundations giving $5 million or more annually in grants. The survey was sent to 472 CEOs and 211 responded for a 45 percent response rate. When asked to rate the extent to which beneficiary feedback has the potential to increase a foundation's impact, 31 percent of CEOs believed that it could extremely increase a foundation's impact (rating it a five on a five point scale) while 42 percent of CEOs felt it could significantly increase a foundation's impact. When asked whether their own foundation seeks feedback from the ultimate beneficiaries of its work, 59 percent of respondents said their foundation was engaged in the practice while an additional 20 percent

[12] Operating foundations and community foundations arguably often have more of an explicit relationship with their beneficiaries given their strategy and approach; however, these comments are limited to the independent foundation field.

[13] Twersky, Fay, Phil Buchanan, and Valerie Threlfall, "Listening to Those Who Matter Most, the Beneficiaries," *Stanford Social Innovation Review*, Spring 2013.

said their foundation was not currently but was considering it.[14] CEP will be further exploring the issue of beneficiary feedback through an upcoming survey of its Grantee Voice panel of nonprofits.

Despite this, when asked to name funders who are being thoughtful about beneficiary feedback work, interviewees for this project could rarely provide any examples. I heard about only a few isolated cases of foundations that have incorporated beneficiary perspectives in program design or operations in a meaningful way.

ASSESSING THE OPPORTUNITY: ADVANCING FUNDERS' LEARNING FROM BENEFICIARIES

Given the lack of existing efforts at the funder level to systematically incorporate and learn from beneficiaries' perspectives, there is significant opportunity for funders to make real advancements in this field through some targeted investments and actions. However, like any new opportunity, there are risks to be managed. Below is a summary of some of the "tailwinds" (e.g. momentum builders) and "headwinds" (contextual challenges) shaping this opportunity. Following this are some proposed goals and strategies for advancing beneficiary feedback for funders to consider.

Tailwinds

- **Growing maturity of the beneficiary feedback field.** Proponents of beneficiary voice describe that the "time for beneficiary feedback has come." In particular, they point to the fact that there is a critical mass of experiments that have reached a mature stage across the globe; higher profile organizations like the World Bank beginning to explore this issue in earnest; and greater discourse about the topic than ever before. Indeed, there seems to be a clear up-tick over the past year in the amount of literature views, blogs, and papers being written about the subject. These inputs are emblematic of a field that could be approaching a key inflection point in its growth. An accompanying increase in funder-level efforts could significantly accelerate the field's progress.

- **The human-centered design "wave."** Principles of human-centered design and "design-thinking" are gaining momentum within the social sector. Design thinking seeks to "incorporate constituent or consumer insights in depth and rapid prototyping, all aimed at getting beyond the assumptions that block effective solutions."[15] Given its explicit focus on engaging users and making their perspectives primary, design thinking has a strong connection to beneficiary feedback. However, the fields differ in at least three fundamental ways. First, design thinking is best suited for use at the earliest stages of program design or before programs have been implemented. It also employs a suite of very specific methodologies – including ethnographic, observation-based inquiry – and generally eschews more traditional data collection methods such as surveys and focus groups. Finally, design thinking often engages "non-users" (i.e. people who are eligible for using services but are not electing to do so for various reasons) rather than just the clients of a program. Despite these differences, the increased interest in and awareness

[14] The results from this survey have not yet been published.
[15] Brown, Tim and Jocelyn Wyatt, "Design Thinking for Social Innovation," *Stanford Social Innovation Review*, Winter 2010.

of the need to be customer or client-centric is a supportive force for the field of beneficiary feedback and is a topical "wave" to be ridden so long as it doesn't add confusion to the already complex field of beneficiary feedback.

- **Increased demand for accountability from clients.** While certainly a less direct "wind," as users of nonprofit programs are increasingly empowered to rate, comment, or just share opinions about their experience with companies, their government, and service providers using tools like social media and online feedback mechanisms, one can imagine that they will demand similar opportunities for their social sector interactions. This has led some to say that beneficiary voice is inevitable – and the question is simply how long until it becomes a real expectation within the sector.

Headwinds

- **Philanthropy's resistance to change and incorporate constituent perspectives.** Some of the largest barriers facing the advancement of beneficiary voice in foundations are cultural. Across many foundations, there is still great fear about hearing what constituents, both grantees and beneficiaries, have to say about the foundation's work and an ongoing resistance to openly examine failures and missed opportunities. For foundations to truly embrace beneficiary views, these fears have to be acknowledged and leaders need to feel supported in their efforts to gather input, recognizing it may sometimes challenge certain assumptions they hold about their work.

- **The value proposition for foundations learning from beneficiary feedback is still unclear.** It seems to be increasingly accepted that nonprofits can benefit from systematically incorporating perspectives from beneficiaries. However, some interviewees for this project question whether foundations can derive analogous benefits; "its unclear whether the value for foundations is as high as nonprofits" one interviewee described. "Given that so few foundations solicit grantee feedback, its hard to imagine them getting beneficiary feedback." In addition, the lack of ongoing experiments suggests there is still pervasive skepticism that foundations can learn from beneficiaries. Indeed, this skepticism may result from there not being enough case studies or examples of how foundations can learn from beneficiaries. However, one can't help conclude that beneficiary feedback is still viewed as irrelevant to many foundations.

- **It's expensive.** Gathering beneficiary feedback in a systematic way is costly and there are few examples of successful nonprofit business models in place. For a foundation to effectively learn from beneficiaries, it would have to involve its grantees in a comprehensive way and subsidize their data collection efforts for the near-term, which could require significant investment.

POTENTIAL STRATEGIES FOR FOUNDATIONS TO CONSIDER

Given the current state of funders' and nonprofits' efforts to learn from beneficiary feedback, foundations could benefit from pursuing a step-wise strategy that is focused on two primary objectives: a) demonstrating how funders can effectively learn from beneficiary feedback and b) supporting broader field development by raising awareness and capturing lessons learned from early experimentation. To achieve this first objective, foundations could consider seeding a series of demonstration projects internally. Doing so would enable funders to authentically share their experiences with their peers and ensure that foundations effectively model a commitment to beneficiary voice (i.e. walk the talk) both internally and externally.

To the second objective, changing the field's perspectives about beneficiary feedback will likely require changing "hearts" as much as "minds." Raising awareness about beneficiary feedback, potentially in new provocative ways, may help shift attitudes and generate enthusiasm for its potential. Capturing the lessons learned from early experimentation will help ensure that when more nonprofits and funders are motivated to invest in beneficiary feedback, they can do it smarter.

There are a variety of ways in which foundations can support experimentation with beneficiary voice internally. What follows are just a few ideas to consider; some of these may require greater resources (financial, political, and social) than others and there are many potential variants to the approaches described here. However, hopefully this list provides a starting point for an active conversation.

- Funders could at a minimum "consider funding constituent feedback systems for individual grantees, when feasible, or for multiple grantees operating in the same field."[16] Some interviewees I spoke with maintain that building grantees' capacity to use consumer or beneficiary insights (and making funders more of a third-party user of the data) is the most realistic and beneficial path forward.
- A funder could also utilize beneficiary feedback to inform its own assessment of a strategy's effectiveness during implementation. For example, beneficiary feedback gathered from multiple grantees implementing a common strategy in diverse communities and locations could provide new insights about key success factors.
- Before investing in a new program area or developing a new strategy, funders could commission human-centered design exercises and engage beneficiaries in authentic open dialogue to determine new funding priorities. Conducting this kind of exercise would allow foundations to surface new insights about the unmet needs of its target population and generate open conversations with beneficiaries.[17]
- A funder could also create a "beneficiary-led" fund where beneficiaries would drive the strategy development, grantee selection and monitoring of ongoing investments. As research as shown, "direct participation by people simply in choosing projects can have a huge effect on improving their satisfaction with outcomes."[18] Over time, it could be instructive to compare this portfolio with one led by foundation staff to see how decisions are made differently and compare outcomes.
- Finally, and most significantly, funders could take steps to embed beneficiary feedback into grantee selection and management practices. For example, grantees could be required to describe their approach for engaging beneficiaries as part of their initial application and ongoing reporting requirements. Program officers and grantees could

[16] Forti, Matthew and Willa Seldon, *From Input to Ownership: How Nonprofits Can Engage With the People They Serve to Carry Out their Missions*, The Bridgespan Group, August 2013.

[17] Reinforcing this idea, consumer products experts at the recent "Power of Information" retreat held by the F.B. Heron Foundation talked about the need to engage consumers "where they already are" and design solutions based on one's observations of customers' behavior.

[18] Whittle, Dennis, *How Feedback Loops Can Improve Aid (and Maybe Governance)*, Center for Global Development Essay, August 2013.

discuss this data as part of diligence, check-ins and site visits. Institutionalizing beneficiary feedback into ongoing management practices will inevitably produce the most sustainable change within foundations but may necessitate significant investment – both financially and politically — as grantees likely do not have funds to systematically engage their beneficiaries on an ongoing basis and this represents a significant change to funders' current practices.

To complement these internal efforts, foundations could pursue the following activities to raise visibility about beneficiaries and ensure that the entire sector benefits from the field's early experiments. These investments will help advance the overall cause of having foundations listen more to beneficiaries by motivating and readying the field for when others are ready to engage:

- An instrumental step to elevating beneficiary voice within foundations is to create more opportunities for authentic dialogue between funders and beneficiaries as well as opportunities for funders to talk openly about their fears. One interviewee recommended to me that immersion or experiential programs in which foundation staff spend concerted time on the ground with beneficiaries is the best way to inspire action. In terms of overcoming fears, some suggested to me that getting funders together in small confidential meetings could help to promote honest dialogue about the barriers to gathering feedback.
- A more provocative approach for elevating beneficiary voices would be to commission a listening exercise that would focus on hearing domestic beneficiaries' perceptions of philanthropy. This could be modeled after CDA Collaborative Listening Projects' recent publication, *Time to Listen: Hearing People on the Receiving End of International Aid*. *Time to Listen* "captures the experiences and voices of over 6,000 people who have received international assistance, observed the effects of aid efforts, or been involved in providing aid." The book contains "lessons for those who care enough to listen and to hear the ways that people on the receiving side of aid suggest it can become more effective and accountable."[19]
- Another approach for raising awareness about beneficiary voice would be to create reward or prize programs that recognize organizations that are most creatively and authentically engaging beneficiaries. This could be internally-focused to foundation departments or externally-focused, engaging non-profits in the field.
- The beneficiary feedback field would also benefit from the development of resources such as a comprehensive resource guide that would codify lessons learned from the ongoing experiments in the field. By commissioning such a report – examining barriers, summarizing tools and resources, and featuring case studies of successful examples of beneficiary feedback – the philanthropic community could help position more organizations to collect beneficiary feedback and support the continued organic growth of the field. Similarly, funding infrastructure organizations within the beneficiary feedback space could help ensure continued advancement of tools and resources for nonprofits.
- Finally, the foundation community could regularly convene thought leaders and peers interested in advancing the beneficiary feedback field. As described to me, there are currently no regular forums for people interested in beneficiary feedback or design thinking, for that matter. Selected thought leaders that I spoke with talked about how

[19] Anderson, Mary B., Dayna Brown, Isabella Jean, *Time to Listen: Hearing People On the Receiving End of International Aid*, CDA Collaborative Listening Projects, 2012.

regular meetings could help support them by giving them space and energy to continue to push for this work in their organizations and facilitate cross-organizational learning and sharing. It would also help build a cadre of funders supportive of this work.

There is much work to be done to advance funders' efforts to learn from beneficiary feedback; however, pursuing this work will require interested funders who are willing to expend political capital both internally to seed projects within their own organizations as well as externally as they take a leadership position in the field. Hopefully, the ideas presented here provide some food for thought about the potential strategies that foundations could pursue and some ideas on potential next steps.

I look forward to discussing these findings with you.

Interviews Conducted

- David Bonbright, CEO, Keystone Accountability
- Ellie Buteau, Vice-President, Research, Center for Effective Philanthropy
- Elizabeth Christopherson, President & CEO, Rita Allen Foundation
- Matt Forti, Director, One Acre Fund USA (formerly Manager at Bridgespan Performance Measurement Practice Area)
- Don Howard, Executive Vice President, Irvine Foundation
- Reginald Jones, CEO, Jacobs Family Foundation
- Renee Kaplan, Chief Strategy Officer, Skoll Foundation
- Barbara Kibbe, Director of Organizational Effectiveness, S.D. Bechtel Foundation
- Mauricio Lim Miller, CEO, Family Independence Initiative
- Dana Pancrazi, Director, Capital Management, F.B. Heron Foundation
- Steve Patrick, Executive Director, The Aspen Forum for Community Solutions
- Nadia Roumani, Lecturer, Stanford University Design School
- Brenda Solorzano, Chief Program Director, Blue Shield of California Foundation
- Dennis Whittle, Former CEO, Global Giving
- Jocelyn Wyatt, Executive Director, IDEO.org

Works Consulted

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Appendix A – Ongoing Beneficiary Feedback Projects

Below is a list of ongoing beneficiary feedback projects, as captured through Internet searches and conversations. It is not considered to be an exhaustive list of all ongoing projects but rather a sampling of some of the most active efforts.

Action Against Hunger – Based in Zimbabwe, the organization regularly includes ombudsman for each project it pursues as a beneficiary accountability system.

ALINe's Farmer Voice Initiative – ALINe is a consortium of funders and practitioners committed to improving measurement, learning and evaluation in agricultural development. ALINe focuses on people-centered Measurement, Learning and Evaluation and created the Farmer Voice Awards in 2010 to celebrate cutting edge practices in farmer feedback.

Checkmyschool.org – Launched by the Philippines Department of Education and the Affiliated Network of Social Accountability, the site helps monitor school resources and note critical shortages in supplies.

Community Scorecards – Developed by CARE Malawi and now promoted by the World Bank, communities and local providers separately identify and rate key aspects of local service provision (e.g. of primary health care). At an 'interface meeting' the two groups discuss the findings and plan improvements. NGOs like CARE and ACDI/VOCA are using versions of the scorecard to monitor their own and partners' work. CARE has similar programs in other countries but utilization differs widely across markets.

Danish Refugee Council – The Danish Refugee Council (DRC) recently launched an SMS feedback system that leverages the Ushahidi platform to display beneficiary views on their projects. In Uganda, working with AidData, DRC is creating a "public platform for feedback via text message, photographs, trip reports, and other information that will provide greater insight into the impact of development assistance as seen from the ground level."

DARA's Humanitarian Response Index – This is a comparative data index that assesses the performance of humanitarian donors compared to the 'Principles of Good Humanitarian Donorship' as defined and approved by the member donors.

Daraja.org – Is an NGO that aims to make local institutions more responsive to the needs of the community in rural Tanzania. Its mission is to empower communities and local institutions, and build their capacity to work effectively together to reduce poverty in Tanzania. Initially, the project used SMS messaging to provide feedback about water services but it has broadened its services to include multiple program areas. Information is forwarded to government officials to enable them to respond.

Family Independence Initiative (FII) – Is a nonprofit organization recognized for its pursuit of a strength-based approach to increasing families' economic and social mobility. FII's model is to place beneficiaries at its core and have groups of families develop and pursue strategies for changing their economic circumstances together. Staff take on a liaison rather than a provider role. Beneficiaries also drive performance measurement, with families collecting and reporting on more than 200 pieces of data back to their respective groups.

Great Nonprofits- Is an online tool that provides user-generated data and ratings on clients' direct experiences with nonprofits in the US. Frequently called the "Yelp of the nonprofit sector," Great Nonprofits collects reviews from donors, volunteers, and beneficiaries.

Humanitarian Accountability Partnership (HAP) – Is a multi-agency initiative working to improve the accountability of humanitarian action to people affected by disasters and other crises. HAP' mission is to make humanitarian action accountable to its intended beneficiaries through self-regulation by its members who share a common respect for the rights and dignity of beneficiaries.

International Federation of Red Cross and Red Crescent Societies (IFRC) – Particularly since the Haiti earthquake in 2010, IFRC has taken steps to expand communications with its beneficiaries and to heighten a sense of accountability to beneficiary communities across its programs. Lessons learned from its recent experiences with large-scale disasters were summarized in a 2011 publication, "Beneficiary Communication and Accountability: A Responsibility, Not a Choice."

Listen First - Concern and Mango developed Listen First to monitor how well NGOs collaborate with local people. It is based on a 4 x 4 framework, setting out flexible performance standards in four areas: providing information, involving people in making decisions, listening and staff attitudes. The approach generates feedback from local people and field staff using the framework, aiming to generate dialogue for improvement. It provides a way of measuring the level of participation actually achieved.

The Listening Project – The Listening Project aims to systematically gather feedback from people who have been recipient of international assistance in an effort to improve the effectiveness of aid. Since 2005, the Listening Project has organized more than 20 listening exercises in Indonesia, Afghanistan, Angola, Bosnia-Herzegovina, Kenya, Kosovo, and Thailand.

Listeningtodar.org – Listening to Dar es Salaam is dedicated to disseminating data and results from the ongoing monitoring of public service delivery in Dar es Salaam. Listening to Dar conducts biweekly phone interviews with a group of randomly selected Dar residents, in which they ask respondents about their views and experiences of basic public services. The data gathered is then shared online, with short analyses completed by listeningtodar.org staff.

Making All Voices Count: A Grand Challenge for Development (MAVC) – This initiative brings together Sweden, the UK Department for International Development (DFID), U.S. Agency for International Development (USAID), and Omidyar Network to create a $45 million fund to support innovation, scaling-up, and research that will deepen existing innovations and help harness new technologies to enable citizen engagement and government responsiveness.

Measuring Empowerment - A social movement in Bangladesh developed a framework of indicators that describes what 'empowerment' means for local community groups, in their own terms. Groups use it to assess their performance every year. Quantified summaries are reported to managers and donors, disaggregated by gender and provide a new basis for assessing staff performance.

Outcomes Star - Outcomes Star is a tool that measures the outcomes of work with homeless people in the UK through the assessment of data generated by the service users themselves. It is based on ten 'outcome areas' such as: physical health, self-care and managing money. Homeless people mark their position on a scale of 1 – 10 for each area, in dialogue with care workers. The approach has been widely adopted in the UK, with over 90 organizations signing up to use it.

Save the Children's Accountability to Children Breakthrough – This program aims to improve the accountability of Save the Children's programs to children and their caregivers by setting up feedback and complaints mechanisms in all of the countries where it operates.

Storytelling Project – A project of Global Giving, the Storytelling Project is an experiment in collecting community feedback. To date, teams of local scribes in Kenya and Uganda have collected close to 60,000 stories from over 5,000 community members about changes in their community. Using Sensemaker, Global Giving turns these stories into data to guide international development efforts.

A Sampling of Relevant Technologies

- www.frontlinesms.com – large scale two way text messaging
- www.ushahidi.com – crowd sourcing citizen reporting
- www.emoksha.com – increasing citizen awareness and engagement
- www.sensemaker-suite.com – analyzing stories from the bottom up

Sources

- Alex Jacobs *ngoperformance.org* blog, http://ngoperformance.org/related-initiatives/feedback-examples/
- Keystone Accountability website, http://www.keystoneaccountability.org/analysis/examples
- Laura Jump, "Beneficiary Feedback Mechanisms: A Literature Review," Development Initiatives, April 2013
- Fay Twersky, Phil Buchanan, and Valerie Threlfall, "Listening to Those Who Matter Most, the Beneficiaries," *Stanford Social Innovation Review*, Spring 2013.