Fund for Shared Insight

# 2015-16 Media Analysis

*September 2016*

## Introduction

Fund for Shared Insight (Shared Insight) is focused in part on increasing the extent to which foundations listen to others—especially the people they seek to help—and respond to their expressed interests. One of Shared Insight's short-term outcomes around feedback practice includes *"more dialogue in the sector about the importance of hearing feedback from the people we seek to help and application (and limits) of collecting feedback into the normal course of business."*

To this end, ORS Impact conducted an annual media analysis of relevant blogs, periodicals, and reports for each of the following timeframes:

- July 1, 2013 to June 30, 2014, the year prior to the launch of Shared Insight,[1] which we refer to as the baseline;

- July 1, 2014 to June 30, 2015, the year immediately following its launch;[2] and

- July 1, 2015 to June 30, 2016, the most recent time period.

This memo outlines changes in the amount and type of discourse in the field around feedback loops in the most recent year compared to the previous two years. We raise a few observations and considerations. More detailed methodological notes follow.

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[1] A link to baseline report can be found here.

[2] A link to the one-year follow report can be found here.
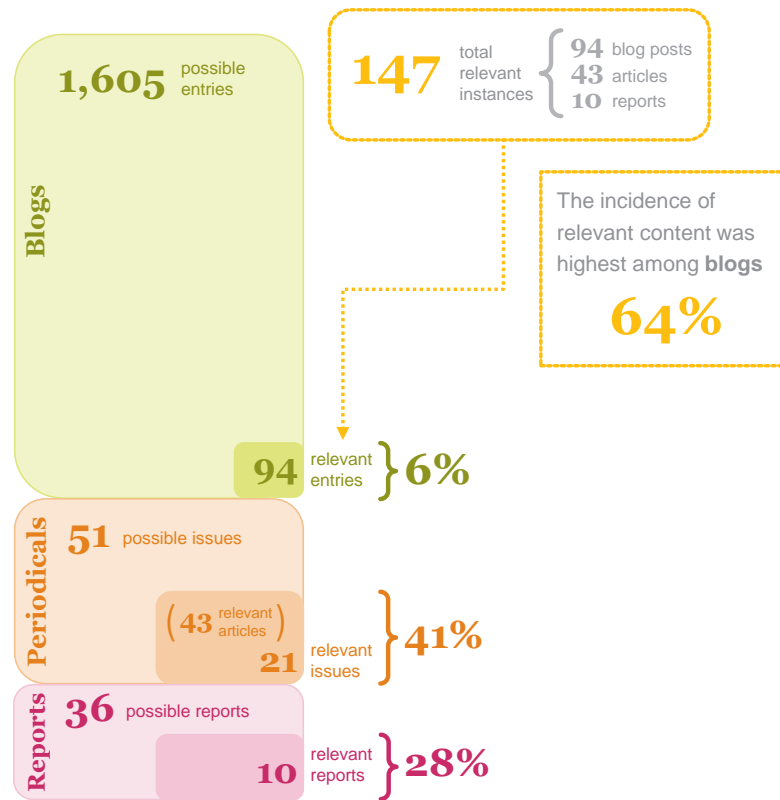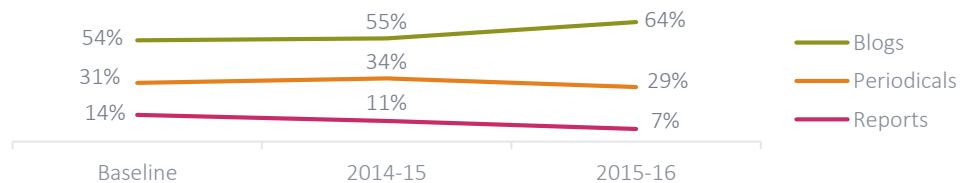
ORS IMPACT

# Key Findings

## There were fewer instances of relevant "chatter" overall.

Between July 2015 and June 2016, there were 147 instances of relevant "chatter" around beneficiary feedback loops, compared to 154 instances the prior year.[3] This decrease may not be surprising given the previous year included the launch of Shared Insight and the publication of The Center for Effective Philanthropy's (CEP) report, *Hearing from Those We Seek to Help*. Figure 1 illustrates the universe of entries from this year's media analysis. The graph below it shows frequencies of relevant content over time.

### Figure 1 | Overview of 2015-16 Media Analysis and Frequencies of Relevant Content



**1,605** possible entries

**Blogs**

**147** total relevant instances { **94** blog posts / **43** articles / **10** reports }

The incidence of relevant content was highest among **blogs**

**64%**

**94** relevant entries } **6%**

**Periodicals**

**51** possible issues

( **43** relevant articles )

**21** relevant issues } **41%**

**Reports**

**36** possible reports

**10** relevant reports } **28%**

% of Relevant Content within Media Analyses over Time



| | Baseline | 2014-15 | 2015-16 | |
|---|---|---|---|---|
| Blogs | 54% | 55% | 64% | |
| Periodicals | 31% | 34% | 29% | |
| Reports | 14% | 11% | 7% | |

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[3] Numbers differ from the prior report because a retrospective analysis was conducted to reflect the inclusion of additional media sources. See Appendix A for more detail.

## Relevant content shows up most frequently in blogs.

Across the three types of media analyzed (articles, blogs, and reports), the lowest proportion of relevant entries came from blogs (6%), which contained the highest frequency of relevant content overall (64%), an increase from last year (55%). This suggests that beneficiary feedback loops are a popular topic of "informal" discourse in the field. Instances of relevant articles (29%) and reports (7%) decreased compared to the previous year (34% and 11%, respectively).

## Within feedback discourse, discussion around using feedback and closing the loop have decreased.

Fifty-nine percent of instances specifically discuss communicating back to grantees and/or beneficiaries about the change that resulted from their feedback (compared to 69% last year). Compared to the prior year, instances describing the systematic collection[4] of feedback stayed the same both years (35%).

## Fewer instances referred to both systematic feedback *and* closed-loop feedback.

Only 29% of instances described systematically collecting feedback *and* communicating back to grantees and/or beneficiaries (compared to 32% last year). This slight decrease may be attributed to the absence of widely disseminated events or reports during this data collection—such as the launch of Shared Insight or the publication of CEP's report noted during the prior analysis. The figure on the following page illustrates the frequency of relevant instances related to systematic feedback and closed-loop feedback.
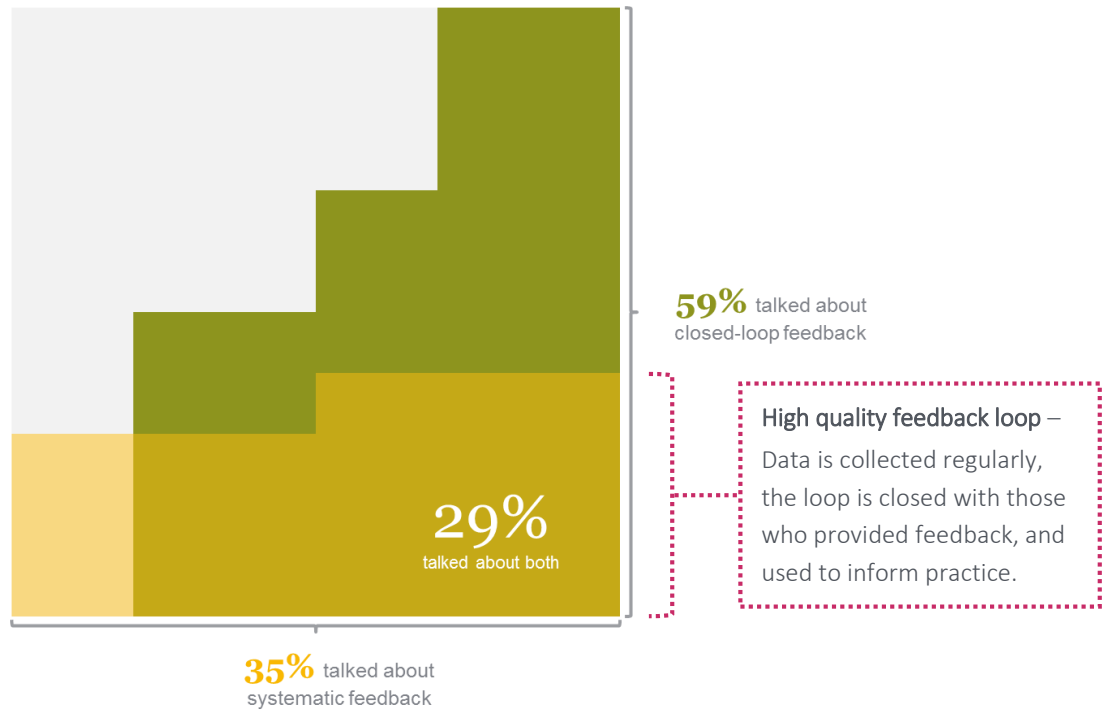
## More instances of feedback were specifically from beneficiaries.

Of all 147 relevant instances this year, 82% specifically described the collection of feedback from beneficiaries (compared to 77% last year). Of instances that discuss feedback from beneficiaries specifically, 51% spoke to the opportunity for that feedback to inform foundations and 53% to nonprofits (67% and 65% respectively, last year).

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[4] Of instances describing systematic collection of beneficiary feedback this year, 15% clearly described systematic collection, while 20% implied but did not explicitly describe regular data collection (e.g., "collected over the years," "can be embedded into a program"). The figure used within this memo combines these two numbers.

Figure 2 | Frequency of Relevant Instances by Feedback Type



**59%** talked about closed-loop feedback

**29%** talked about both

**High quality feedback loop** – Data is collected regularly, the loop is closed with those who provided feedback, and used to inform practice.

**35%** talked about systematic feedback

## Well-known blogs and periodicals are publishing more relevant content.

Similar to previous media analyses, well-known blogs and periodicals are publishing content around beneficiary feedback. The following table includes blogs, periodicals, and authors that had three or more instances of relevant content in this year's analysis.

Table 1 | Voices/Venues with Three or More Instances of Relevant Content

| Blogs | Periodicals | Authors |
|---|---|---|
| • Alliance Magazine | • Alliance Magazine | • Aaron Dorfman |
| • Center for Effective Philanthropy | • Chronicle of Philanthropy | • Alison Carlman |
| • Chronicle of Philanthropy | • Inside Philanthropy | • David Bonbright |
| • FSG | • Nonprofit Management and Leadership | • Ethan McCoy |
| • National Committee for Responsive Philanthropy | • Philanthropy News Digest | • Genevieve Maitland Hudson |
| • Stanford Social Innovation Review | • Stanford Social Innovation Review | • Phil Buchanan |
| • Markets for Good | • The Foundation Review | • Philanthropy News Digest |
| | • The Nonprofit Times | • Srik Gopal |
| | | • Suzanne Perry |

## Some voices and venues were lost, but others were gained.

Compared with the previous year, there were some changes across venues and voices. Decreases were greatest among blogs (5) and specific authors (7). The following table lists the changes among voices/venues that have three or more instances of relevant content across blogs, periodicals, and their specific authors.

Table 2 | Changes in Voices/Venues from the 2014-15 Annual Media Analysis

| Voices/Venues | Lost | Gained |
|---|---|---|
| Blogs | <ul><li>Bridgespan</li><li>High Impact Philanthropy</li><li>Leap of Reason</li><li>Philanthropy News Digest</li><li>Social Velocity</li></ul> | <ul><li>FSG</li><li>Markets for Good</li></ul> |
| Periodicals | | <ul><li>Nonprofit Management and Leadership</li><li>The Foundation Review</li><li>The Nonprofit Times</li></ul> |
| Authors | <ul><li>Alliance Magazine</li><li>Debra E. Blum</li><li>Ellie Buteau, Ph.D</li><li>Lisa Ranghelli</li><li>Mario and Lowell</li><li>Melinda Tuan</li><li>Ramya Gopal</li></ul> | <ul><li>Alison Carlman</li><li>Genevieve Maitland Hudson</li><li>Srik Gopal</li><li>Suzanne Perry</li></ul> |

## Feedback is still happening most frequently in social sector work around education and international development.

Similar to previous years, feedback related to education (11%) and international development (11%) showed up most frequently, followed by health (9%), youth/families (4%), and economic equity (3%).[5]

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[5] Focus areas were only coded when relevant content explicitly described a specific sector. If the focus was unclear, descriptions were coded as "unknown" (69%).

## There were fewer instances of advocating for the use of beneficiary feedback loops and of examples illustrating the implementation of feedback loops.

While 81% of instances acknowledged the possibility of using beneficiary feedback loops; only 19% advocated for their use (73% and 27%, respectively, last year). Sixty-three instances (43%) described the actual practice of collecting beneficiary feedback (compared to 49% last year).

### Data from 2015-16 Conferences

The 2015-16 media analysis, for the first time, includes analysis of conference abstracts and conference blog posts. Conference data was excluded in prior analyses because there was insufficient content during previous collection periods. There were 13 instances of relevant sessions and conference blog posts this year.[6]

*Highlights of conference data:*

- 100% of relevant conference content described the practice of collecting beneficiary feedback to some extent.

- 19% of conference presenters were connected to Shared Insight, either as a Core Funder or a grantee.[7]

- Though we were only able to analyze conference session abstracts and posts on conference blogs, most instances described feedback from beneficiaries to foundations (10), followed by feedback from beneficiaries to nonprofits (4).

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[6] These data were pulled out of the full analysis for consistency between annual media analyses, so that results could be more easily compared longitudinally.

[7] See Appendix B for a list of presenters.

# Observations

## There is less specificity when describing feedback.

The terms "feedback," "feedback loop," "beneficiary," "constituent," and "voice" are consistently being used in the field. While this suggests a popularization of these concepts, it also leaves room for instances where terms are stated with less specificity, and thus less aligned with the Shared Insight definition of beneficiary feedback. The following quotes indicate the range of examples for how the term "feedback loop" was used this year.

> *"Does the learning strategy include direct **feedback loops** with frontline workers and service users?"* – Alliance Magazine

> *"To make meaning of the system, learn about how it evolves and influence it over time, you consistently (check all that apply): Have rapid **feedback loops** to learn how a grantmaking intervention is and is not influencing system structures and behaviors in real time (i.e., less than two months)."* – Grantmakers for Effective Organizations

> *"**Feedback loops** can be embedded into social service programs at greater scale, speed, and accuracy. With multiple choice assessments or quizzes for each module, online learning gives teachers real-time feedback."* – Stanford Social Innovation Review

> *"More foundations routinely engaging in high-quality **feedback loops** to better understand and consider the perspectives of the people they seek to help. By this we mean more foundations listening to feedback from grantees and the people they seek to help, as appropriate, acting on the feedback they hear, and, where practical, 'closing the loop' by engaging in dialogue with those who provided feedback and the grantees who may have been partners in collecting that feedback."* – Alliance Magazine

## The work of Spitfire Strategies, Shared Insight's communications partner, minimally appeared in this year's data.

Media outreach regarding key Shared Insight announcements—such as additional foundations joining Shared Insight, new awards being delivered, and Listen for Good grantee selection—were minimally present in this year's data collection. Spitfire Strategies has also cultivated media relationships with press, however these contacts did not appear in the data this year (compared to one contact last year). It will be interesting

to see if and how the targeted communications work (Listen for Good grantees and conference submissions) and targeted voices show up in next year's media analysis.

## There were fewer references to Shared Insight this year.

Shared Insight came up by name substantially less often this year compared to last year (9% compared to 22%). Though this may be expected as Shared Insight launched during the prior collection period, it raises questions around the collaborative's goals for how and how often its work is referenced in the field, and whether this is desirable or detrimental to the broader movement.

# Conclusion

During this collection period, content relevant to beneficiary feedback decreased for the first time. These results bring to light an opportunity for Shared Insight to consider what success looks like and to identify goals between collection periods. Going forward, it will be interesting to see what resources or events contribute to greater visibility of beneficiary feedback.

# Appendix A: Methodology

This year's media analysis was consistent with previous analyses in which blogs, periodicals, and reports were collected and analyzed using the terms "beneficiary" / "constituent voice," "beneficiary" / "constituent feedback loops," and "beneficiary" / "constituent feedback." Relevant content for this analysis was published between July 1, 2015 and June 30, 2016.

## Data sources

We reviewed blog posts from the following sources:

- Albert Ruesga posts in White Courtesy Telephone
- Alliance Magazine
- Arabella Advisors – Greater Good
- Beth Kanter
- Bridgespan
- Center for Effective Philanthropy
- Chronicle of Philanthropy
- FSG
- Give Well
- High Impact Philanthropy
- Independent Sector
- Kathleen P. Enright in Huffington Post
- Leap of Reason (Leap Updates newsletter)
- National Committee for Responsive Philanthropy
- Philanthrofiles – Posts by Andy Carroll
- Philanthropy 2173 – Lucy Bernholz
- Philanthropy News Digest – PhilanTopic
- Social Velocity (Nell Edgington)
- Stanford Social Innovation Review
- Markets for Good
- Steven Mayer – Just Philanthropy

Traditional publications reviewed included the following periodicals:

- Alliance Magazine
- Chronicle of Philanthropy
- Inside Philanthropy
- National Committee for Responsive Philanthropy
- Nonprofit Management and Leadership
- Nonprofit Quarterly
- Philanthropy Magazine (from Philanthropy Roundtable)

- Philanthropy News Digest (from Foundation Center)
- Stanford Social Innovation Review
- The Foundation Review
- The Nonprofit Times
- Blue Avocado

Reports published by the following key sector organizations were included in our analysis:

- Arabella
- Bridgespan
- Center for Effective Philanthropy
- FSG
- Grantmakers for Effective Organizations
- Markets for Good
- National Committee for Responsive Philanthropy
- Rockefeller Advisors

# Modifications to methodology since last year

## Inclusion of additional sources

**Previous analyses**. Did not include Bridgespan (for blogs and reports) and National Committee for Responsive Philanthropy (for blogs and periodicals).

**Change in year two follow-up**. This year we added Bridgespan and National Committee for Response Philanthropy to better reflect sources in the field.

**Implication**. Retrospective analysis was systematically conducted on the previous two media analyses to ensure that data is comparable longitudinally.

## Restructuring type of organization and focus area

**Previous analyses**. Type of organization and focus area were previously combined into a category called "sector" that included various descriptors (e.g., philanthropy, arts/media, economic equity).

**Change in year two follow-up**. Organization type and focus area were separated into discrete categories. Every piece of media was coded in "organization type" (social sector, private sector, other/unclear) to reflect what type of organization was discussed in the instance. Organizations were only coded by "focus area" if the instance had a clear focus area (e.g., a blog post about feedback loops in education would be coded as having an education focus).

Implication. By restructuring this section, we are better able to distinguish between the types of organizations described independent from the organization's focus area(s). This provides another layer of detail that may be interesting for future analyses.

## Strengths and limitations

The key strengths of repeating this media analysis are as follows:

- It provides a way to assess changes in public discourse of the sector through multiple media (blogs, periodicals, and reports) over time.

- The timeframe of one year should capture major sector events that would re-occur annually (e.g., conferences), as well as offer a comparable number of times for organizations to publish (e.g., organizations that publish on a quarterly basis).

- The consistent use of search teams and sources allows us to make comparisons from year to year within the sample.

Conversely, the primary limitation of the media analysis is:

- It is not exhaustive, in that it uses predetermined terms and sources. There are almost definitely additional instances of dialogue related to feedback loops that are not included in our analysis.

A limitation specific to conferences is:

- Assessing conferences is limited to the content available (e.g., online abstracts, presentation overviews) and/or while it is available.[8] There may have been other relevant sessions that were excluded because their descriptions or materials did not contain the key words.

Nevertheless, we feel confident that the trends noted in this memo accurately reflect what is happening related to discourse in the field.

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[8] On occasion, conference websites were removed or updated after the conferences were complete. Although data was collected during the conference period, for certain conferences there's no simple way to review findings.

## Appendix B: Conferences

This year, conferences were added but treated separately as multi-year data is not yet available. As further conference data is collected, future media analyses may integrate this data with blogs, periodicals, and reports.

Content from the following conferences was reviewed:

- 2015 Forum Annual Conference: July 21-23, 2015

- National Conference – 2015 Connect: October 5-7, 2015

- 2015 Annual Meeting (Philanthropy Roundtable): October 15-16, 2015

- 2015 Independent Sector National Conference: October 27-29, 2015

- Yale Philanthropy Conference 2016: February 12, 2016

- Global Philanthropy Forum Conference – People on the Move: April 4-6, 2016

- Council on Foundations 2016 Annual Conference – The Future of Community: April 8-12, 2016

- GEO The Learning Conference: May 2-4, 2016

The table below is a list of conference presenters, and their organizations, as described on conference materials.

| Presenter | Organization(s) |
| --- | --- |
| Arelis Diaz | W.K. Kellogg Foundation |
| Beeta Jahedi | San Diego Grantmakers |
| Brian Walsh | FSI/Liquidnet |
| Deborah Ellwood | CFLeads |
| Frank Mirabal | City of Albuquerque |
| H. Walker Sanders | Community Foundation of Greater Greensboro, Inc. |
| Jill Poklemba | The Fortune Society |
| Josh Fidler | The Baltimore Community Foundation |
| Juan Carlos Soriano | Next Generation Climate, Global Greengrants Fund |
| Juliana Vélez | Women's Environment & Development Organization |
| Kimberly Spring | The Annie E. Casey Foundation |
| Matthew Perkins | Local Initiatives Support Corporation (LISC) |
| Melinda Tuan | Fund for Shared Insight |

| Presenter | Organization(s) |
|---|---|
| Melissa Ramos | Kaiser Permanente |
| Michael Guerrero | Climate Justice Alliance |
| Nelson Colón-Tarrats | Puerto Rico Community Foundation, Inc. |
| Nilda Ricard | Drop-in Center Health Services, The Fortune Society |
| Phil Buchanan | Center for Effective Philanthropy |
| Pia Infante | The Whitman Institute |
| Rajasvini Bhansali | International Development Exchange (IDEX) |
| Rajiv Khanna | International Development Exchange (IDEX) |
| Sam Schaeffer | Center for Employment Opportunities |
| Samantha Harvey | The Overbrook Foundation |
| Seema Iyer | Baltimore Neighborhood Indicators Alliance – The Jacob France Institute |
| Stanley Richards | The Fortune Society |
| Tess Reynolds | New Door Ventures |
| William Klimon | Member, Caplin & Drysdale |