

Listen for Good: Evaluation Design

January 4, 2016

Context

The Fund for Shared Insight's goals with Listen for Good are to:

- Support a greater number and diversity of “customer-facing” nonprofits to either get started or improve their practice of systematically collecting and using feedback from the people they seek to help. By diversity, we mean supporting nonprofits of different budget sizes, type of work/issue area on which they focus, and geography in which they work.
- Experiment and learn about applying/adapting the Net Promoter System (NPS) to the beneficiary feedback context – including determining what questions “work” for organizations and beginning to build out benchmarks in key “verticals” (e.g. food banks, shelters, vocational training programs, financial literacy programs, etc.).
- Engage more funders in supporting, using and caring about beneficiary feedback loops by structuring Listen for Good as a co-funding/matching grant opportunity; study whether/how this changes their relationship with the grantees whose feedback loops they support and/or changes funders’ own use of beneficiary feedback data to inform their work.
- Capture and share lessons learned with grantees, co-funders and the field to positively catalyze the feedback movement and productively inform the work going forward.

Fifty organizations are expected to be supported through the matched funding process and to participate in other supports (i.e., orientation, trainings, technical assistance). Some number of organizations may organically use the available resources later in the process without funding and additional supports, while some organizations may receive financial support from the core funders separate from the co-funded organizations. Neither of those groups are included in the 50 organizations receiving co-funding from Shared Insight. Shared Insight expects to fund these organizations in two to three rounds, beginning in January 2016 through July 2016. Each round will disburse grants on a rolling basis and will run for two years.

At this stage, we would expect there to be a wider variety and diversity across participating organizations; while there may be some sets of grants that could form a vertical, the goal at this time is not to establish NPS standards for a particular sector segment.

Evaluation Context

This initiative is exploratory; there are many questions that could be answered and a lot to learn. There is a desire by Shared Insight to choose a design that will provide rich, nuanced insights that can support decisions they will make about future funding or initiatives and to provide information to the broader field on whether, when, and under what conditions the NPS methodology can serve the goal of systematic feedback from beneficiaries that promotes action by nonprofits. The audiences for this evaluation strand are Core Funders, Listen for Good co-funders, Listen for Good grantees, and the field at large.

Because the initiative will have support from Valerie Threlfall and her colleague, the value add this external evaluation effort can provide will be focused on questions related to organizational changes among nonprofit grantees and co-funders. Additionally, the degree to which this initiative has broader impact or seeds a new field will be questions that can be addressed under the overall strategy evaluation for Shared Insight that is currently underway.

The timeline for this evaluation will cover the life of the total set of grants, with the first cohort beginning in January 2016 and the final cohort ending July 2018. ORS Impact plans to report on initial findings at the end of 2016 so that adjustments can be made before making funding decisions for round two.

Assumptions

By identifying our assumptions at the start, we intend to be clear about what this evaluation proposes to learn:

- There will be a strong focus on deep learning, not on accountability or surface yes/no answer regarding the use of NPS as a process.
- There is underlying assumption that collecting beneficiary voice is the right thing to do—the exploration lies around whether and the degree to which/scenarios/places in which NPS is the “smart” way to do it.
- For these 50 organizations the Listen for Good team will be screening for early adopters, those who have a positive attitude and enthusiasm for the effort, though variable levels of implementation capacity. The evaluation will not focus on attitudes as much as internal capacity and organizational changes.

Evaluation Questions

The questions ORS Impact is well-positioned to answer through the Listen for Good evaluation focus on:

- Capacity and practice changes among the grantee organizations
- Practice changes among the co-funders
- Additional insights on the approach, including beneficiary experience and lessons learned from the NPS approach (e.g., adaptations made, differences across the diversity of participants, etc.)
- The grantee and co-funder perspective on non-monetary supports and overall initiative approach, given our external point of view.

The nature of the questions across these areas evolve over time. As a two year initiative, we envision four primary points for evaluative inquiry, particularly for grantees:

1. Within the first six months of the grant: our expectation would be that all grantees within that round have been on-boarded, received some technical assistance, and could be reasonably expected to make progress on or have solicited some feedback during this time. This time is useful for gathering early feedback on the process and supports, understand grantee capacity and get early feedback on insights and supports.
2. Near the end of the first year of the grant: this timeframe is useful in part because of decision-making for 2017 grant-making; it is also an opportune time to start to look for early changes, or indicators of future change, within organizations and programs.
3. Near the end of the second year of the grant: we would seek to fully understand the organizational changes that have occurred as well as the likely sustainability of changes, how this has differed across groups, and how capacity was built/maintained.
4. June 2018: near the end of the expected lifespan of the initiative, it could be of interest to look at the first round or two in a light way to see what in fact has been continued within the former grantee organizations.

The table on the following page shows the flow of questions over time that would be focus of inquiry across the grantee organizations, core funders, beneficiaries, and the NPS approach/Survey Monkey tool, and the initiative.

Listen for Good Evaluation Questions Overview By Timeframe and Focus of Inquiry

Time-point Focus of Inquiry	Within first six months	Near end of first year	Near end of second year	Post-grant
Grantees	<p>Capacity: -What capacity exists and is being built to: collect beneficiary feedback; use beneficiary feedback; close the loop with beneficiaries?</p> <p>Process: -What challenges and successes are grantees experiencing with this work (e.g., NPS approach, within organizations, among beneficiaries, etc.) -How are grantees experiencing the SurveyMonkey portal and reporting tools? What suggestions do they have for improvement? -How are grantees experiencing the supports? -What are most valuable or could be changed? Are different supports desired?</p>	<p>Capacity: -How has capacity changed to collect, use, and close the loops from regular, high quality feedback loops? How does this differ across different types of grantees?</p> <p>Organizational Changes: -What early changes are we seeing grantee organizations make in response to collecting and using feedback (e.g., changes in specific programs, staff practices, policies/priorities, etc.)? How does this differ across different types of grantees?</p> <p>Process: -What are we learning about the different stages of the process (i.e., collecting feedback—timing, survey design, collection--analyzing data, making sense of data, making changes based on data, feeding back information, starting new loop)? -What new lessons have been learned about seeking feedback using this approach (e.g., practices for collecting, analyzing, using data)? -What are bright spots? Unexpected headwinds? What changes could be made to support the work?</p>	<p>Capacity -How has the capacity to collect and use regular, high quality feedback changed? How does this differ across different types of grantees?</p> <p>Organizational Changes: -What changes are being realized by the organization? How has the collection and use of feedback affected beneficiaries? How does this differ across different types of grantees?</p> <p>Process: -How likely are organizations to sustain or expand efforts? -What else have we learned about the different stages of the process? How well were organizations able to implement “high quality feedback loops” as defined by Shared Insight? -What affect have grantee efforts had in other spheres (other organizations, other funders, their fields, etc.)? -What are bright spots? Unexpected headwinds? -What can be learned about when/how/under what conditions this method is a smart choice?</p>	<p>Organizational Changes: -To what degree are high quality beneficiary feedback loop practices been sustained following the grant?</p> <p>Impact: -Is there any evidence that the collection and use of beneficiary feedback data is supporting greater beneficiary impact?</p> <p>Process: -What have we learned about NPS’ applicability for the nonprofit sector within this experiment? -When and under what conditions has it been fruitful? What limitations have been identified?</p>
Method/ Timeframe	Survey/will finalize timeframes depending on how grantmaking timing	Rd 1 sample of interviews Alternate: focus groups in convenings	Case studies in 3-4 sites Survey:	Phone Interview: Rd 1: 6 mos post (June 2018)

Time-point Focus of Inquiry	Within first six months	Near end of first year	Near end of second year	Post-grant
	goes, may have to do in two waves per Round	Followed by survey: Rd 1: Nov 2016 Rd 2: Feb 2017 Rd 3: May 2017	Rd 1: Nov 2017 Rd 2: Feb 2018 Rd 3: May 2018	
Co-Funders		-To what degree are funders engaged in the initiative and with their co-funded grantees? -For those who are engaged, what have they learned about their grantee(s)? About their own work? -Do they think differently about how grantees or their foundation could use high quality beneficiary feedback data?	-For those engaged, what have they learned about their grantee(s)? About their own work? -Do they think differently about how grantees or their foundation could use high quality feedback data? -How, if at all, has this initiative affected their organization (e.g., awareness/prioritization of use by grantees, relationships with grantees, other program areas in the foundation, approach within participating team, collection or use of beneficiary feedback data, etc.)? -What impact do they see this having in the social sector more broadly?	
Method/ Timeframe		Interviews with all co-funders: Nov/Dec 2016 (n=30-40)	Interviews with all co-funders: Oct/Nov 2017 (n=30-40)	
Beneficiaries			-How do beneficiaries feel about the method? Do they feel it provides them with a forum to share information? -Do they feel they can provide candid feedback? -Do they feel heard? -Are they seeing the organization closing the loop?	
Method/ Timeframe			As part of in person site visits through focus groups, intercept surveys or method TBD (Fall 2016)	

Data Collection

As described in the table above, we envision a mixed methods approach to this evaluation, utilizing available secondary data and collection of qualitative and quantitative data. The recommended data collection approaches include:

- 6 month surveys with each cohort
- 12 month surveys with each cohort
- 24 month surveys with each cohort
- Qualitative data collection to augment surveys, including:
 - Interviews with a sample of Round 1 grantees
 - Focus groups associated with convenings
 - Case studies of 3-5 sites, including interviews with a broader set of staff, organizational leaders and beneficiaries
- Annual interviews with co-funders
- Structured check-ins with Listen for Good staff
- Use of descriptive or other systematic data available from grant reports, TA, etc.

In addition to, but separate from the evaluation, there is another line of work around mining the data resulting from the grantees' efforts to learn more about the use of NPS. These could include questions related to the norms of supporters/detractors, the variability of responses, the completeness of data from respondents, etc.

Proposed Deliverables

To maximize utility and application of evaluation findings, we would provide the following products:

- Memo for survey results for each round at 6-, 12- and 24-months (i.e., 9 memos) for internal use. We would also suggest sharing each round's results with that set of grantees.
- Memo summarizing findings across each round's 6-month survey with findings from co-funder interviews for sharing with co-funders and the field.
- Memo summarizing findings from across each round's 12-month survey for sharing with co-funders and the field.
- Final report to include summary across 24-month surveys, case studies, and second co-funder interviews for the broader field. In addition, we'd create a shorter executive summary to be shared.
- Memo on post-initiative follow-up with Round 1 grantees

Alignment/Integration with Overall Evaluation Design

In the parlance of the overall evaluation design for Fund for Shared Insight, Listen for Good could be considered a “Cluster.” Cluster-focused questions included:

- What can be learned about assumptions made when funding each cluster?
- 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?
- What synergies are occurring within or across clusters?

We think the questions and methods detailed above help answer the first two questions here; synergies across is a question we can answer through analysis of data from across clusters in our overall role as evaluator.

Additionally, we did not add questions about the degree to which this effort seeds a field. It feels as though that question is better addressed through the overall evaluation of the strategy and could be captured in the follow-up to the baseline in 2018.4133