

## Fund for Shared Insight: 2015 Grantee Interview Themes

October 2015

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In October 2015, ORS Impact interviewed representatives from the 14 organizations that received grants from the Fund for Shared Insight. The purpose of these interviews was to capture insights from the experiences of grantees in their work to date, with the goal of informing discussion and decision making during the November Core Funders meeting. More complete reports of progress on activities and outcomes will be based on the reports by grantees due in January 2016.

Findings are summarized below by key groups of grantees, as well as by current areas of interest of the funders.

### Feedback Loop Practice

Based on the work to date, we found it most instructive to look for themes among grantees who are directly engaging in collecting, analyzing, and using feedback from beneficiaries. This group includes Center for Employment Opportunities, Chapin Hall/i.e. communications, Habitat for Humanity, LIFT, and Urban Institute/Feeding America.<sup>1</sup>

- Grantees are mostly meeting expected levels of implementation at this point in the process.
- The more difficult parts of implementing quality feedback loops have to do with the following: maintaining quality implementation (including training and prioritizing among staff and volunteers), ensuring that sense-making is happening, and trying to close the loop in meaningful ways.
- Concerns remain in two key areas: ensuring that feedback is candid and varied enough to be constructive, and getting quality information at scale. This latter point includes ensuring that approaches do not become overly site-specific and considering the resources required for methods such as focus groups, which are found to elicit valuable qualitative data but are not scalable because they require considerable time and resources.
- We heard about many instances of grantees connecting with other Practice grantees. For example, two grantees have formed a workgroup, and others have made more one-off connections to share information about their projects and problem solve. On the whole, the Practice grantees found the convening valuable for networking.

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<sup>1</sup> Though Urban Institute/Feeding America and Chapin Hall/i.e. communications were funded as Research grants, the focus of their research projects seem closely aligned with the other Practice grantees.



## Infrastructure for Feedback Loop Practice

While Feedback Labs, GlobalGiving, Keystone Accountability, and YouthTruth were given grants within the Practice cluster, their focus on providing resources, tools, and platforms for encouraging the collection and use of beneficiary feedback differentiated their experiences from other grantees directly engaged in feedback work. We found it most valuable to look at themes across these four grantees as an Infrastructure group.

- All four grantees in this grouping are showing consistent positive progress relative to their intended outcomes.
- Grantees spoke to a rising sense of momentum around the idea of feedback loops, but less around the actual implementation of feedback loops. Several discussed the need to still grow demand for tools and metrics.
- Several interviewees also mentioned confusion among staff and partners around the difference between feedback loops and other reasons they might collect information from beneficiaries, such as collecting stories or quotes for marketing/development and other outcome-based evaluation efforts.
- With the development of infrastructure around feedback loops, issues around interoperability between tools and platforms continue to arise. One grantee also mentioned the challenge of competing with for-profit companies that do similar work.
- Grantees in this group have developed good connections with one another. In some cases they are working to find synergy across their work and/or sharing lessons learned.

## Openness

Five groups were funded within the Openness cluster, reflecting a range of efforts, from licensing and knowledge product labelling and storing, to videos, to research. Grantees include Creative Commons, Issue Lab/Foundation Center, Center for Effective Philanthropy, Exponent Philanthropy, and GiveWell's Open Philanthropy Project.

- All grantees appear to be making expected progress on grant activities and outcomes.
- This group of grantees reflects a set of different, uncoordinated activities in this space; based on their observations of the field, interviewees describe this as consistent with activity in the field more broadly.
- As noted in the original Landscape Review by Valerie Threlfall and the additional exploration conducted by the Openness sub-committee in July of this year, these grantees cited a variety of motivations for foundations to engage in openness work.
  - All cited the potential for greater effectiveness and impact in one way or another.
  - However, the grantees working most directly on changing philanthropic practice described various motivations within individual foundations and across foundations, ranging from being influenced by their peers or leaders in the field, to desiring to keep up with standards in other sectors like hard science, to meeting a felt need for better knowledge management practices.
- Ideas about how to change philanthropy practice vary across grantees.



- Use a more top-down approach attempts to get leadership on board with a larger policy change for organizations.
- Employ a more mid-range theory, believing that there is easy “brush” to clear at mid-levels. This could include staff for whom their service can make their job easier (e.g., grant managers) or support the goals of knowledge development (e.g., evaluation staff) without having to seek out high-level support and broad policy adoption.
- The diversity of the sector, e.g. size or organization, type of staffing, tenure with grant making, etc., could suggest different approaches rather than one overarching approach.
- One headwind noted had to do with the increased focus on communications functions within foundations. Because staff in these roles see their job as supporting external-facing communications, they have been unexpectedly reluctant to engage in openness conversations. Prime targets instead have been leadership, legal and program staff, grant managers, IT staff and evaluation staff.
- Grantees in this group appreciated the convening but experienced less long-term value from it. They were also less positive about the value they got from being part of the group of grantees compared to the other clusters.

## Fund for Shared Insight as Grantor

All grantees have been very satisfied working with Shared Insight. Many spoke positively about the community that has developed among funders, among grantees, and between funders and grantees. For instance, one grantee explained that they appreciate having relevant articles forwarded to them by Melinda. It is unusual—yet appreciated—to have a relationship with their funder beyond their reporting requirements.

## Additional Considerations for the Core Funders

While we did not have any specific questions about Listen for Good or Shared Insight communications as part of our interview protocol, several insights emerged that may be helpful to consider.

### Listen for Good considerations

- The experiences of the Practice grantees suggest that internal practices around the sense-making, use, and sharing back of results are the most challenging parts of the process, even for organizations who demonstrate sophistication around collection of beneficiary feedback. This may be helpful to think about when creating supports for Listen for Good grantees.
- We also think that experiences of grantees implementing feedback loops suggest that there may be a sequencing of organizational work, beginning with norming around terms/ language and prioritization of activities, leading to enhanced focus on quality of implementation, and followed by quality use of beneficiary feedback. It may be helpful to assess where Listen for Good grantees are in that process and sequence supports accordingly.



- There still seems to be some concern among grantees about the applicability and utility of the NPS question in the sector, including the degree to which there will be useful variability in responses and enough participation in open-ended questions to support program improvement changes.
- There is room for more clarity about whether the intervention Listen for Good is promoting is a “question” (i.e. a 0-10 scoring question for the social sector) or a process of continuous improvement (i.e. the implementation, analysis and use of data from the NPS questions to support better outcomes for beneficiaries).

## Communications implications

- Only two grantees—both Infrastructure—responded positively to the concept of being a “vanguard”. Most grantees when asked about the term recommended that Shared Insight positions itself and its grantees in a wider field and cautioned against a tone that suggested an exclusive club, that others are not also working on implementing feedback loops, and being careful about the degree to which this is positioned as “new”.
- As noted above in the Listen for Good implications, there is opportunity to ensure that messaging around NPS strikes the desired tone, and distinguish whether the intention is to promote a question (or set of questions) or that NPS is a possible tool to enhance the effectiveness of nonprofits.