Fund for Shared Insight

Listen for Good Evaluation

Twelve-Month Results

November 2017

ORSIMPACT

ORSIMPACT

Missions Accomplished

1100 Olive Way, Suite 1350 | Seattle, WA

206-728-0474 | ors@orsimpact.com

Table of Contents

Table of Figures

Section I

Introduction

Listen for Good (L4G), an initiative of Fund for Shared Insight (Shared Insight), offers grants for customer-facing nonprofits to experiment with collecting client feedback. Using the Net Promoter System (NPS), L4G seeks to *"explore a simple but systematic and rigorous way of collecting feedback"*[1] to build the practice of high-quality feedback loops among nonprofits across issue areas, populations served, geographies, and budget levels. Beginning in 2016, the first rounds of L4G were made up of 46 grantee organizations that vary by location, size, population-served, and type of work.

Organization of Report

This report summarizes findings and lessons learned in three areas:

1. **Listen for Good in Action:** What we're learning about implementation of the five-step feedback process in L4G

2. **Grantee Experiences with Listen for Good:** Feedback and suggestions from respondents about L4G supports, and data about changes in organizational capacity

3. **Institutionalizing Feedback Practices:** What we're learning about the spread and likelihood of continuing feedback post-grant, and considerations for the current, upcoming, and future iterations of L4G

---

[1] Retrieved from: http://www.fundforsharedinsight.org/listen-for-good-overview/

For each main area, we share back the data collected and provide a few key takeaways from our analysis and synthesis.
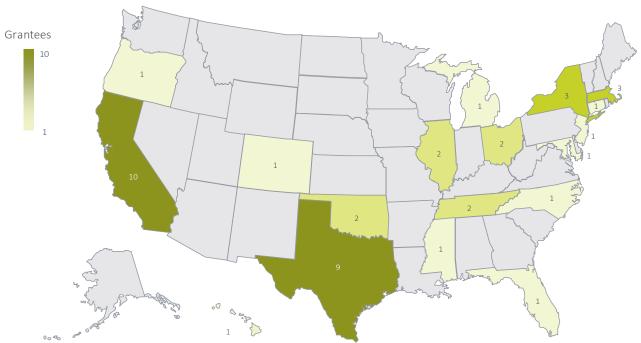
This report is part of an overall L4G evaluation, which previously looked at results six months into implementation, and will later include data collection at the end of the grant as well as follow-up to understand longer-term institutionalization and sustainability.

Grantees in Our Sample

This L4G grantee cohort included 46 organizations across a variety of budget sizes. Almost half of grantees (47%) were medium-sized organizations with a budget between $1 million and $10 million. A third (33%) were larger organizations with budgets above $10 million and fewer (20%) were smaller organizations with budgets under $1 million.

The three most represented service areas among grantees were human services (26%), community and economic development (20%), and health services (17%), with a smaller number of grantee organizations providing education services (9%). Of the remaining grantees, 17% did not identify a specific service area, and 11% provide other services such as public affairs, public safety, environmental issues, or arts and culture. Lastly, the grantees in our sample represented a variety of regions across the US, as shown in Figure 1.

Figure 1 | Geographic Representation of Grantee Organizations

Methodology

We invited a program manager and agency leader from each organization to complete a survey one year after beginning L4G. Agency leaders were asked to reflect on their organizations' progress toward building client feedback loops from their perspective as the leader of their organization. Program managers responded to more detailed questions related to the L4G initiative. **Eighty-five percent of agency leaders and 87% of program managers responded, with 45 of the 46 grantee organizations represented by at least one respondent (98%).** Details can be found in Appendix A.

Survey data were analyzed using descriptive statistics. In this report we also explored correlations and regressions to see if we could identify useful and statistically significant relationships between organizational variables and the degree to which organizations found insights or made changes based on feedback data. Open-ended comments were also analyzed for themes.

Section II

Listen for Good in Action

Part of understanding grantee organizations' experiences in implementing and using client feedback data involves understanding the degree to which they have undertaken different components of the work and what they are learning through implementation. In this section, we look at how the grantee organizations are implementing their L4G feedback practice.

Grantee Organizations' Status in Steps

The L4G initiative organizes the feedback process into a series of five steps. Below, we share what program managers reported back about their implementation and progress through the five steps.

Steps 1 and 2: Survey Design and Data Collection

Completed
100%
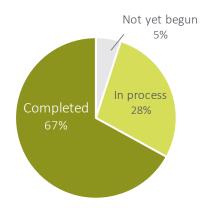
After one year as a L4G grantee, **all program managers reported implementing a feedback survey at least once.** Survey implementation in one program versus multiple programs was comparable at 53% and 48%, respectively. Frequency of survey implementation varied: 26% of respondents implemented once, 33% implemented 2-3 times, 28% implemented 4-6 times, and 13% implement on an ongoing basis.

When asked to report all methods of survey administration, program managers most frequently reported the following methods: paper (23 organizations), computer/laptop (21), or tablets (21). Fewer utilized text messaging (6) or other methods (9, e.g., emailing links, in-person interviews). Of the 36 responding program managers, 69% (25) used multiple methods of administration.[2]

---

[2] For this calculation, we considered "tablets" and "computer/laptop" to be one method of administration.

Step 3: Interpreting Results

Not yet begun
5%

In process
28%

Completed
67%
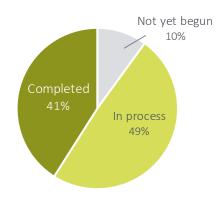
Two thirds (67%) of program managers reported completing the interpretation of results. Of those who remain, 28% are still in the process of interpreting results, while 5% have not yet begun but report feeling confident about their ability to undertake interpretation.

> *"We have data that looks like it could bring additional insights, but we need to dig in further." – Program manager*

Step 4: Responding to Feedback

Not yet begun
10%

In process
49%

Completed
41%
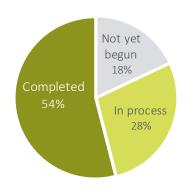
Fewer than half (41%) of program managers have completed responding to feedback, while 49% report they are in the process of responding.

> *"The survey made us realize we don't have enough adult programs." – Program manager*

The remaining four program managers who have not yet begun responding to feedback have started to think about how they will do so by using past survey data to amend their survey design, changing who is involved in analysis, and *"creating meaningful graphical interpretations"* of collected data to share with *"multiple stakeholders."*

Step 5: Closing the Loop

Just over half of program managers (54%) reported closing the loop with clients; 28% are in process.[3]

When asked what they will share or have already shared back with clients, the 32 program managers who have completed or are in the process of completing this step most frequently cited a summary of results (27 organizations). Program managers also provided clients with a simple thank you (13), no specific results (4), or all results (3). More than half (18) shared back just one type of information. Only one grantee organization is providing *"no specific results"* to clients, with just a thank you for participating.

Program managers reported that sharing back happens most frequently through in-person meetings (19) or via a poster/handout (12). Eight also utilized on-on-one meetings, and six used a paper or electronic newsletter. Sixteen respondents reported other ways of sharing feedback that included technology such as a website and social media (11), a group format for in-person sharing (4), or displaying findings using PowerPoint in a common area such as a lobby (2).

The seven program managers who have not begun *Step 5* are beginning to think about how to best share back feedback data with clients. For example, one respondent reported having a plan in place, one is beginning the planning process, and one is going back to the survey design process *"to get the information we need."*

---

[3] You may note the surprising jump in program managers who report closing the loop from those who have completed responding to feedback. These numbers are correct and are discussed in more detail later in this section.

Staff Involvement

In this evaluation, we wanted to better understand how different organizations were staffing and engaging their colleagues in their feedback work. Across all responding agency leaders, approximately 672 staff members participated in the L4G work. **The number of staff involved ranged from one (only true for two organizations) to the entire organization (400+), with the most common number of staff involved being four.**

Most organizations involve different types of staff in their feedback practice.

Organizations typically involve a range of staff types, as shown in Figure 2. Agency leaders most frequently noted involvement of program directors, program staff, and administrative staff, as well as their own involvement. **More than half of organizations engage three or four "types" of staff, while one quarter (eight organizations) involve only one type of staff.**
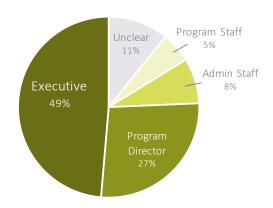
Figure 2 | Percentage of Organizations That Involve Staff Types (n=37)

46%

59%

51%

51%

10%

3%

26%

Executive Staff
(e.g. CEO, VP)

Program Director

Program Staff
(e.g. managers and direct service staff)

Administrative Staff
(e.g. evaluation, development, and communications staff)

Support Staff
(e.g. low-level administrators and work-study staff)

Volunteers

Unclear

Executives and directors are typically involved, especially later in the process; a minority of organizations only have lower-level staff involved.

Figure 3 | Highest Level of Staff Involved in L4G (n=37)

Executive 49%
Unclear 11%
Program Staff 5%
Admin Staff 8%
Program Director 27%
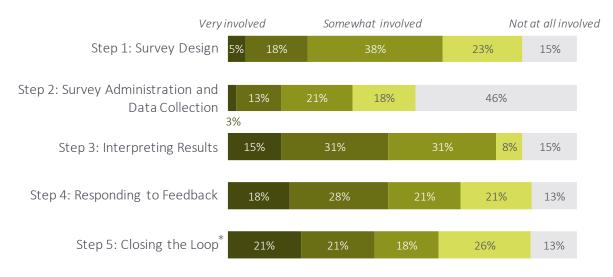
When we looked at the highest level of staff involved in organizations, **almost half of the responding agency leaders named an executive such as a CEO or VP**, and a little more than one quarter (27%) named program directors. One quarter named program or administrative staff as the highest level of staff involved in the L4G feedback work. We could not determine the highest level of staff involved for 11% of the responses. The results are shown in Figure 3.

When we asked agency leaders how involved they have been in the L4G initiative, they reported increasing levels of involvement in *Step 3: Interpreting Results* and *Step 4: Responding to Feedback*, with the least involvement in *Step 2: Data Collection*. The results are shown in Figure 4.

Figure 4 | Agency Leader Involvement in the L4G Process (n=39)

	Very involved		*Somewhat involved*		*Not at all involved*
Step 1: Survey Design	5%	18%	38%	23%	15%
Step 2: Survey Administration and Data Collection	3%	13%	21%	18%	46%
Step 3: Interpreting Results	15%	31%	31%	8%	15%
Step 4: Responding to Feedback	18%	28%	21%	21%	13%
Step 5: Closing the Loop*	21%	21%	18%	26%	13%

*n=38

Takeaways: Step Status and Staff Involvement

- **Steps aren't always happening in the defined sequence**. We expected the number of organizations completing each step to decrease from earlier to later steps. However, more program managers reported completing *Step 5: Closing the Loop* (54%) than *Step 4: Responding to Feedback* (41%.) This could be for a number of reasons. Some organizations may be closing the loop (i.e., reporting feedback data back to clients) before or while the resulting organizational changes are being made. Some could combine closing the loop while simultaneously interpreting the data with their clients. Some organizations may share back what they heard and why they aren't making a change. Additionally, organizations that implement surveys in an ongoing manner may think differently about what is considered "completed" versus "in process." It may be useful to recognize that the steps aren't completely sequential when thinking about ongoing technical assistance (TA) and supports.

- **There is good evidence of high-level engagement in L4G organizations.** The team composites indicate buy-in at the top levels of the grantee organizations. Agency leaders report involvement in interpreting results (46%), responding to feedback (46%), and closing the loop (42%). These later steps typically require more organizational buy-in, and the involvement of high-level staff makes taking action in response to feedback data more likely. Multiple staff functions are included beyond just programmatic roles on teams, which is potentially a good sign of broader institutionalization of feedback practices across the organization.

Findings: Survey Design and Implementation

After one year as grantees, all respondents reported completing the survey design and implementation steps (*Steps 1* and *2*). While most of our evaluation is focused on the later steps (e.g., interpreting results, making changes, and closing the loop), grantees continue to share lessons learned from survey design and administration.

Program managers continue to experiment with survey administration.

When program managers were asked if they are doing anything different in how they administer the survey or how often they administer based on previous experience, 69% said yes. This also held true in their open-ended responses, with many respondents talking about **changes to the method of survey administration** (11 of 28).

Though not a prominent theme, we noticed some divergence in comments relating to technology and method of administration. When asked about their lessons learned and concerns for survey administration, three respondents noted that while they had hoped technology would be a good survey collection method, it wasn't always an appropriate choice for their population. Alternately, one respondent noted that they found the smart phone option to be easier than they thought and faster, with less time needed in the computer lab.

> "We have worked to grasp a better understanding of how often and when to survey and what that looks like."
> – Program manager

> *"With technology assumed to be so prevalent, we need to be aware of the demographics we are surveying in order to use the right mode for survey administration." – Program manager*

When asked to explain any changes they had made to survey administration, program managers also mentioned **changing the survey window or frequency** (5 of 28) or **changing/refining their sample** (4 of 28, e.g., targeting disengaged students, adding surveys for parents, or surveying in cohorts).

Some challenges still arise in survey administration.

When asked if they were aware of staff struggling to implement high-quality feedback loops, half of the agency leaders had seen struggles, and more than half of those (10 of 19) raised up issues with collecting data. Often these issues were common among **populations with unique challenges** (e.g., incarcerated youth, people with intellectual and developmental disabilities, reading level challenges,

an agency that does not provide the direct service) or because of specific challenges related to the **setting** (e.g., clinics, large community-wide events, constituents who are only seen once).

Program managers continue to refine their surveys.

Seven respondents who answered questions about changes to survey administration also talked about changes to survey design, including how they were **asking and using custom questions.** Two others talked about **changing wording in the survey** to ensure they got what they wanted from respondents.

Takeaways: Survey Design and Implementation

- **There is not necessarily one optimal way to collect feedback.** As noted earlier, 65% of grantee organizations collect data using multiple methods of survey administration.

  "We found that we are able to move to electronic surveys for [one] population because we engage with them on a regular basis…. However, we found that we need to do paper surveys for our [other] participants." – Program manager

- **There is still a heavy reliance on paper surveys.** As noted earlier, not all organizations find technology to be the most efficient way to collect feedback data, and almost three quarters use paper as one of their methods of survey administration. This reliance on paper may raise a flag about the resources and staff capacity required for ongoing data collection and the institutionalization of feedback practices.

- *Steps 1* **and** *2* **are far from static.** As noted earlier, the five steps in L4G suggest that organizations move sequentially through survey design and data collection processes, then on to interpreting, responding, and closing the loop. What we see from this evaluation is that organizations continue to iterate on these elements.

  - **Some iterating indicates organizational buy-in.** Some comments seem to indicate that survey administration is being expanded to new kinds of populations or programs. As the work continues, it may be important to think about how the earlier steps of the L4G process are revisited and supported later in the process. This could be a way to strengthen organizational capacity, build skills to adapt and refine the feedback approach over time as part of an ongoing organizational practice, in addition to building technical skills for implementing a set process.

  "We are now tailoring the [customized] questions to specific programs rather than a general set of customized questions." – Program manager

  "We have begun to use the information we gathered from our first year of surveying as our own feedback loop to create more meaningful surveys." – Program manager

"We have switched from surveying participants who are actively engaged to those who are disengaged to learn why young adults stopped showing up. We made this change because we were not learning much new from active participants, since we often seek their feedback anyway. Our goal has shifted to thinking about what we can do to keep participants from disengaging, based on feedback from those who have disengaged." – Program manager

– **Some experimentation raises questions of "fit."** There were also concerns about the usefulness of the data, leading to more fine-tuning of questions, samples, and methods of administration to increase response rates. And, as noted by agency leaders' responses, some staff continue to struggle with survey implementation in some settings and with some populations. As L4G continues, it may be worth paying attention to how implementation goes in different program models and settings to identify when and where this kind of client feedback survey is the best fit.

"Generally, we have struggled and worked through ways to get feedback from [clients] that is meaningful to us, one step removed from the providing services." – Agency leader

"Getting our residents to actually trust us and want to complete a survey but also figuring out a means of surveying residents we don't see face-to-face or often… is a hurdle we have to address." – Program manager
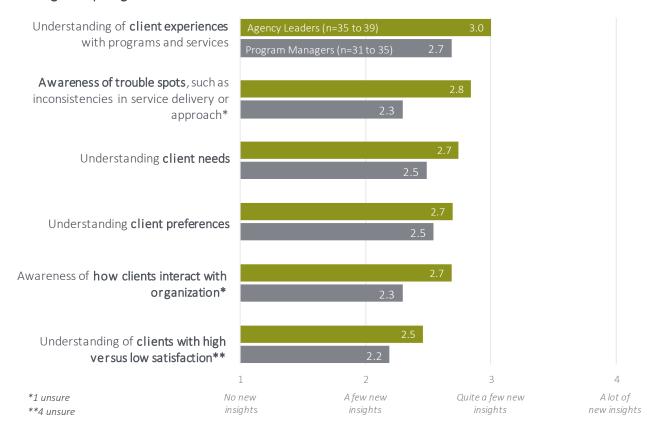
Findings: Interpreting Results and Using Data

In earlier evaluations, few organizations had completed *Step 3: Interpreting Results* and *Step 4: Responding to Feedback*. This section delves into the lessons shared by program managers and agency leaders to date.

Grantees shared mixed findings about the utility of the data, and there are differences between agency leaders and program managers.

Early on, there was some concern that there would be too little variation in client responses to the NPS questions to provide useful feedback for organizations to act on. **Of the 26 program managers who have completed or are in the process of completing *Step 3*, 73% found useful variation in their data.**

While the results on useful variation are heartening, other data tell a slightly more mixed story about the utility of the resulting data. The overall percentage of program managers or agency leaders who reported new insights ranged between "a few" to "quite a few" new insights across all categories, with the high end of the scale being "a lot." See Figure 5 for the full results.

Figure 5 | Insights Gained from Feedback Data

	Agency Leaders (n=35 to 39)	Program Managers (n=31 to 35)
Understanding of **client experiences** with programs and services	3.0	2.7
Awareness of trouble spots, such as inconsistencies in service delivery or approach*	2.8	2.3
Understanding **client needs**	2.7	2.5
Understanding **client preferences**	2.7	2.5
Awareness of **how clients interact with organization***	2.7	2.3
Understanding of **clients with high versus low satisfaction***	2.5	2.2

*1 unsure
**4 unsure

1	2	3	4
No new insights	A few new insights	Quite a few new insights	A lot of new insights

13

It is important to note that the question asks respondents about *new* insights. This may provide an explanation for the results, meaning the findings may be confirming existing hypotheses. For example, agency leaders reported higher insights across all categories than program managers; program managers, who are likely closer to the work, may also be less likely to learn new insights than agency leaders.

Given the strong results for finding "useful variation," we were also surprised at the results around understanding different levels of satisfaction. With this survey, we didn't specifically ask program managers about variation in the quantitative or qualitative data that come from the L4G tool. Across open-ended responses, program managers provided mixed responses to the utility and variation of data from the open-ended questions; some share it has been the most valuable while others share that responses to those questions have lacked depth and specificity. This may be something to explore differently at the next survey point or with the 2017 cohort.

Open-ended comments reflected a minority theme around wanting more or different information from both program managers and agency leaders. While this is coming from a small number of organizations (6), we may want to further explore this for any lessons it may provide for future cohorts or broader expansion efforts.

There are a few statistically significant differences in the level of new insights among different types of grantees.

With the full data set at 12 months, we wanted to see if we could better understand any relationships between the amount of insights and other organizational characteristics, like size, organization type, leadership commitment, progress through the steps, or barriers.

Funding Round Mattered.

We found a significant positive relationship[4] between the average number of new insights reported and which funding round organizations were a part of in 2016. Grantees who were part of the third round of funding averaged 2.9 new insights, compared to 2.1 for Round 1 and 2.4 for Round 2. At most, grantees could have reported six new insights. See Figure 5 on the prior page for details.

There is no clear explanation for why there are differences by round, and it is the only item with a significant relationship to new insights. L4G staff had several possible hypotheses: Round 3 had smaller agencies with greater staff perceived leadership commitment, Round 3 had greater access to

---

[4] $p < .05$ based on one-way ANOVA.

peers via webinars and the grantee convening (the latter occurred while they were beginning to implement the L4G work), and these organizations were given more flexibility in the survey design process, which may have led to the ability to gather more actionable, program-specific data. Additionally, they were slower to go through the L4G steps by six months, so perhaps more insights felt new to these organizations compared to other rounds with organizations that moved through the stages more quickly.

Higher capacity predicts more new insights.

The higher an agency leader rated their organization's capacity,[5] the higher the average number of new insights. By exploring the degree to which different organizational characteristics could predict higher numbers of new insights[6] and controlling for other variables that might explain that relationship (e.g., budget size, agency type, number of steps completed, reported barriers), we found a significant ($p < .05$) positive effect between agency leaders' average ratings of organizational capacity at 12 months and the average number of insights. This pattern did not hold true when we ran the same statistical test to look just at program managers' data.

It is unclear why this was only true from one organizational perspective. One possible explanation is that program managers reported fewer new insights. As staff closer to the day-to-day, feedback could confirm or bolster something they had considered rather than immediately raising up new information.

Grantees are using L4G data to make changes.

About one third of organizations reported using the data to make a change to operations, program offering, and/or how staff interact with clients. Agency leaders more frequently reported changes, which may be related to their purview or knowledge of changes that have been put in place. Grantees reported the fewest changes made related to "providing new services," which likely requires a more significant investment of time and resources. These results are shown in Figure 6.

> "The results are helpful to program implementation, timing, needs, etc."
> – Program manager

---

[5] Capacity elements rated include ability to: implement surveys with clients at least two times a year; achieve high response rates across the set of intended clients; collect useful data from clients; analyze data from clients; interpret data from clients in a way that can inform your work; close the loop with clients after analyzing and interpreting the data; and use survey results to improve organizational programs.

[6] We created several regression models to explore this question, including looking at agency leaders and program managers separately and through a merged data set. Full results are presented in Appendix B. Note: because of the strong correlation with round of funding, we excluded round from the regression model to tease out other relationships that might exist.

Figure 6 | Distribution of Changes Made or Planning to Make

Agency Leaders n=37   Program Managers n=35

	Changes made	*Plan to make*	*Not sure*

Adjustments to operations
(e.g., how programs delivered, communication or coordination across programs)

| 38% | 40% | 22% |
| 29% | 49% | 23% |

Adjustments in how staff interact with clients
e.g., strengthen professional development for staff, host cultural sensitivity training, create volunteer service)

| 32% | 49% | 19% |
| 37% | 31% | 31% |

Adjustments to program offering
(e.g., modify curriculum, improve quality of food served)

| 35% | 43% | 22% |
| 37% | 34% | 29% |

Providing new services
(e.g., trying new innovations in response to feedback or adding new programs & services to address expressed needs/preferences)

| 26% | 34% | 40% |
| 20% | 32% | 48% |

There were a few statistically significant differences in the number of changes made among different types of grantees.

Like our analysis to better understand when new insights were gained, we also wanted to understand if there were useful, significant relationships for organizations that reported making changes.

Progress through the steps matters.

Not surprisingly, organizations that were further along in the completion of steps reported a significantly higher number of changes made.[7] This relationship held true when holding other variables constant (e.g., organization budget, barriers reported).

---

[7] $p < .05$ based on one-way ANOVA. Changes made as a variable could range from 0 to 4 based on a count of the number of changes reported as "made" related to operations, how staff interact with clients, program offerings, or providing new services.

Capacity matters.

As with new insights, organizations reporting higher levels of organizational capacity were significantly more likely to have made more changes as a result of the information collected, when holding constant other variables and looking across responses from both program managers and agency leaders.[8] While this finding is not revolutionary, it further affirms the focus on capacity building within L4G.

When looking just at data from program managers, organizations of all budget sizes were significantly less likely to report making changes if they also reported "limited resources" as a barrier and were further along in the number of steps in the L4G process they had completed.[9]

---

[8] Linear regression, merged data, p<.05.

[9] There were other items moderately significant at a p<.10 level. Because no clear patterns provided actionable information, we have not included those findings here. Full results can be reviewed in Appendix B.

Takeaways: Interpreting Results and Using Data

- **Data analysis is not rising up as an issue** in the same way as data collection, survey design, and closing the loop. This may be because some organizations are still on the earlier side of this work, or because the tools within SurveyMonkey are providing enough data in a format that is useful. This is an area to keep an eye on. We were also surprised to not see any comments around challenges in analyzing qualitative data from open-ended questions given experiences shared by other Shared Insight grantees who have used other approaches to develop their organizational feedback practices.

Figure 7 | Example Grantee Survey Monkey Report

- **While there may not be "a lot of new insights" reported, there are enough to make changes** for 90% of program managers, with 41% making changes and 49% in the process. While the degree to which changes have been made within one year seems positive, L4G staff hope that this number will continue to increase over the second year of feedback work.

- **Some additional analyses confirm the importance of organizational capacity.** While new analyses to understand relationships or predictors for the use of feedback data don't provide a great deal of new insights for program design or supports, findings do suggest that building organizational capacity is an important element to seeing organizations *use* feedback.

Findings: Responding to Feedback and Closing the Loop

In the L4G approach, quality feedback is more than collecting, analyzing, and even using feedback data; sharing back what you are hearing with those who provide the feedback is critical. This section looks at early lessons around closing the loop with clients, as well as what organizations are sharing back and experiencing with their co-funders.

On the whole, grantees report positive experiences from the process of sharing back information to their clients.

Of the 27 respondents who shared comments about what they were learning, 19 (70%) had positive lessons learned. Twelve program managers spoke to new lessons about closing the loop:

- Six program managers recognized **clients' appreciation for staff efforts to share back results.**

    "[Clients] enjoy the opportunity of receiving the results and having an opportunity to potentially affect change." – Program manager

    "Our [clients] appreciate that we share results back with them." – Program manager

- Six program managers shared insights about **ways to close the loop and what information was best to share back**.

    "From the first administration, we learned that a fairly large percentage of those who received the survey invitation looked at the website that summarized some findings and next steps." – Program manager

    "[We are learning] that multiple means of communication are best." – Program manager

- Five program managers were able to speak to **lessons learned around how to best make programmatic changes**.

    "We are learning how to utilize feedback from our program participants to adjust our programming in a more targeted way." – Program manager

    "[We are learning] how to expand services in the most client-centered way." – Program manager

A minority of respondents shared some concerns and challenges they experienced in closing the loop.

While only 30% of program managers had concerns to share, half (4 of 8) were related to wanting more or different information. Specific comments included data that were too positive, not enough in-depth qualitative comments, difficulty getting deeper explanations behind results, or challenges with being able to respond given the one-off nature of feedback received. All but one of these comments came from Round 1 organizations.

One small theme that emerged from these comments had to do with the need to bring other staff along before closing the loop with clients. In some cases, program managers need to ensure staff members are on board with the feedback, or balance competing concerns around their organization's marketing or communications efforts with critical feedback from clients.

As noted previously, half of the agency leaders surveyed reported being aware of areas where staff have struggled; one quarter of leaders made comments about closing the loop, representing leaders across all three rounds. This also is an area of need related to organizational capacity, which is discussed later in this report.

Agency leaders report positive experiences sharing with their co-funder.

Almost all agency leaders (95%) report communicating with their co-funder about their organization's feedback work. Most of this communication occurred in-person (68% for both one-way and two-way[10]) or via email (65% for one-way; 59% for two-way.) About one quarter of respondents also reported one-way and two-way communication happening over the phone and through grantee reporting. Most shared lessons or insights learned (81%) or a summary of results (62%). Far fewer shared all results from surveys (14%) or no specific results (11%).

Of the 29 responding agency leaders, 28 reported positive responses from their co-funder.[11] Figure 8 displays a word cloud of agency leader responses, with larger words being the most prevalent.

---

[10] In our survey, we wanted to understand the degree to which L4G grantees provided information to funders (one-way) versus having more dialogue and conversation about what they were learning (two-way). While these terms are intended to get at openness of and engagement with co-funders, they weren't clearly defined in the survey.

[11] One outlier has not heard back due to staff changes.

Figure 8 | Grantee Description of Co-Funder's Response to Sharing Feedback Data

Many responses were very brief and comprised of only one or two words. Among those who provided more detail, three respondents mentioned ways that the funder was going beyond appreciation, and one wanted to know how feedback could be used by the grantee organization beyond the area funded by the grant. Another provided additional resources, one set up meetings with other funders, and three mentioned their funder participating in or co-presenting with them at gatherings with grantee organizations.

Takeaways: Responding to Feedback and Closing the Loop

- **There is growing energy around closing the loop.** As time passes, there seems to be more energy and positive experiences around closing the loop. It may be useful to consider the finding from program managers who need to bring along other staff before they can share back information with clients. Does this suggest new or different kinds of TA or supports?

- **There is broadly felt enthusiasm from co-funders.** The data provided by agency leaders on co-funders' responses were sparse. While their positive words bode well, they do not tell us much about the co-funder strategy and the degree to which grant makers are being impacted more directly. There will be more data on this front soon from the broader evaluation of Shared Insight's first three years.

Section III

Grantee Experiences with Listen for Good

L4G was built with the idea that a simple tool and set of structured supports could lead to high quality and institutionalized use of feedback practices. In this section, we look at grantee experiences with the TA and their perceptions of their capacity to engage in feedback work.

TA Experience

Grantees find ad hoc and individualized TA most valuable.

While program managers find almost all the TA helpful, respondents find the ad hoc TA **helpful or very helpful**, consistent with findings from the six-month evaluation. This was echoed in the open-ended responses.
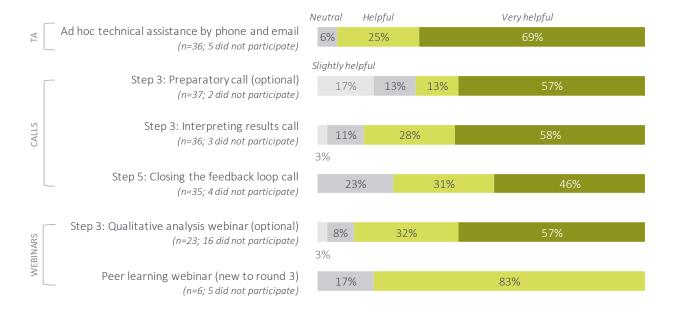
> *"I have really appreciated the flexibility and that the TA has really been tailored to our needs." – Program manager*

> *"Valerie and her team responded quickly whenever we had questions or sought help."*
> *– Program manager*

Ratings also tend to be higher for the individual calls that organizations have with the L4G team over broader forms of support, like webinars. The results are shown in Figure 9.
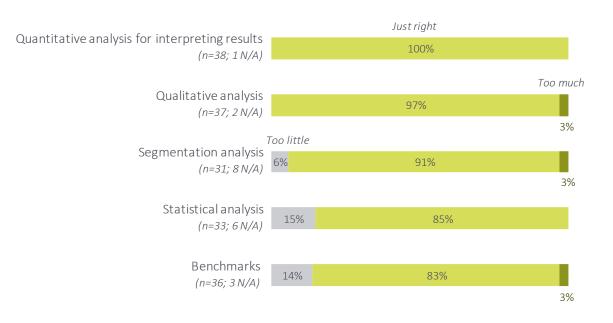
Figure 9 | Program Manager Perceptions of L4G's Helpfulness

Most TA is "just right," but there is some interest for more in a few areas.

We asked program managers to rate the amount of support provided by the L4G team. Consistent with the six-month evaluation, most are happy with the amount, as shown in Figure 10. There is interest among five organizations for more support around benchmarks and/or statistical analysis.

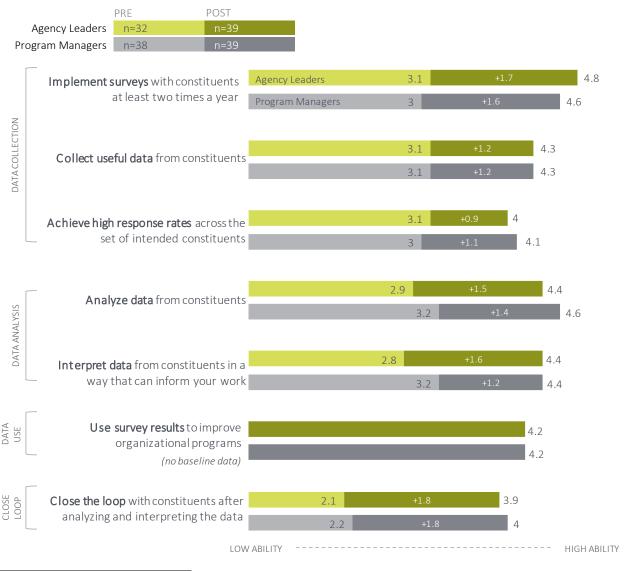Figure 10 | Program Manager Ratings on Amount of TA Support

Changes in Capacity

We asked program managers and agency leaders to rate their capacity levels at three points in time: prior to beginning L4G as a retrospective assessment, at 6-months, and at 12-months

Overall, grantees feel their capacity is improving in all aspects of the L4G process.

As shown in Figure 11, agency leaders and program managers reported that their organization has increased its capacity across skills related to data collection, data analysis, and data use.

Figure 11 | Reported Capacity Growth Since Involvement in L4G[12]

Grantees still report a lower ability to close the loop with clients.

While the self-reported ratings show significant growth since the six-month evaluation where staff provided a retrospective assessment of their capacity at the start of the grant, comments provided by program managers and agency leaders continue to show concern in this area. Nine out of 31 program managers referenced issues or room to grow in this area in their comments about their capacity ratings.

> *"Implementing surveys continues to get easier now that it is standardized in terms of a survey and a process. Closing the loop continues to be a learning process across programs, but at least we are able to do it. We weren't necessarily [closing the loop] consistently before." – Program manager*

Some program managers note that they are doing better with sharing results with staff, but not those who provided the feedback. Some simply still aren't there in their process yet; half of the comments about closing the loop came from Round 1 respondents, while none came from Round 3.

Agency leader comments had similar patterns related to capacity to close the loop. Additionally, among the 50% who were aware of their staff struggling with implementing feedback loops, five of the 19 leaders noted issues with closing the loop.

Agency leaders appreciate the benefits to organizational capacity from their involvement in L4G.

When asked to choose from a list of possible benefits, many leaders selected increased internal capacity to collect feedback (85%) and increased internal capacity to analyze and respond to feedback (77%). There still is room for growth for increased capacity to communicate with clients, a pattern seen throughout the survey data. These results are shown in Figure 12.

Figure 12 | Agency Leader Perceived Capacity Benefits from L4G Engagement (n=39)

There were also comments relating to issues with improving response rates.

Program managers in particular noted issues related to improving response rates in their open-ended responses about capacity ratings. Six comments were related to data collection, four of which spoke to needing to address response rates. This was more prevalent for respondents from later rounds.
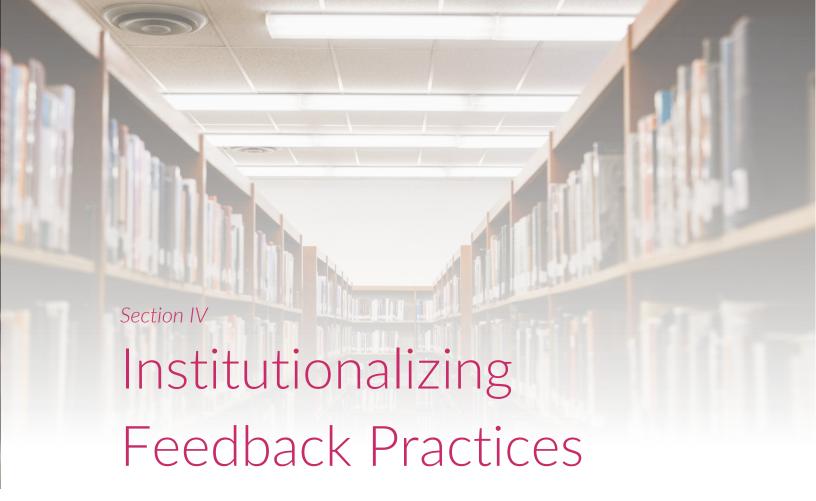
> *"We would like to see higher response rates from our program participants given that we have a limited number of clients from which to solicit feedback." – Program manager*

> *"The one big challenge we have had is getting high response rates, but this is in part due to the nature of our population. We serve a very hard to reach population, so getting them to engage in a survey is tough." – Program manager*

Takeaways: Grantee Experiences with L4G

- **Organizations report growth across all key aspects of the feedback process.** While self-reported capacity has its limitations, improved capacity is positively and significantly related to changes made in organizations, so it is well-linked to desired outcomes of L4G.

- **Closing the loop is still newer and less strong.** While more organizations are further along in the process of sharing back information with clients, there seems to be continued opportunity to strengthen capacity around closing the loop. As noted previously, some organizations must first figure out how to share data and close the loop with program staff before they go back to clients, something that hasn't traditionally been considered part of the loop-closing step. This may warrant attention or new supports.

Section IV

Institutionalizing Feedback Practices

The L4G grant extends over two years to help organizations institutionalize these practices. In this section, we share what we have learned about organizations' intentions for feedback practices beyond the grant.

The majority of grantee organizations intend to both continue and increase their implementation of feedback after the grant.

As shown in Figure 13, almost two thirds of agency leaders and more than half of program managers reported they will continue and increase their collection of feedback after the grant. Many note they want to **expand to additional customer groups, programs, partners, or** *"across the organization."*

Six of the 18 agency leaders who said they would continue and increase collecting feedback, and also explained their answer, mentioned the **alignment to values**, writing they are *"customer-centric,"* *"[client focus] is a key part of our strategy,"* or *"we want to be responsive to the people we serve, and the only way to do that is knowing what they want and need."* Three agency leaders noted that **the tool and process were tremendously helpful and easy to implement.**

Program managers were more likely to note the value of the system and process, with six of 20 mentioning that as an explanation for their longer-term plans and four noting the alignment to their organization's priorities and values.

Figure 13 | Plans to Continue Collecting Feedback After L4G Grant

Two thirds of agency leaders (67%) across all rounds reported they **had already** *"incorporated collecting and responding to feedback into other areas of work* besides the program for which they had applied."* Those who provided more detail mentioned other programs or populations (3 of 9 responses) and non-client-focused surveys, such as volunteers or staff (4 of 9). One third of agency leaders and one third of program managers said they would maintain their current practice. Only two individuals noted that they would continue but decrease efforts. While this question did not specifically ask leaders if these feedback efforts were "new," comments suggest that they are not reporting on pre-existing activities.

Program managers perceive high levels of support among their organizations' leadership for ongoing feedback work.

Almost two thirds (62%) of program managers gave the **highest rating possible**, "High," for support among their organizations' leadership. On the low end, only three individuals (8%) provided a rating of "3" on the "1-Low" to "5-High" scale. When asked to explain their answer, 23 of the 26 open-ended respondents noted that the **process fit the organizational values, priorities, or culture.**

> *"Our organization has a strong respect for our clients and commitment to ensuring their experience is respectful." – Program manager*

> *"Senior management value the data and learnings from the project and would like to see it continue." – Program manager*

While the alignment with organizations was a strong theme, a few respondents (4 of 26) noted that **there is value, but it is also easy to cut.**

> *"They seem to value the work and want it to continue, but there are still hard choices*
> *to be made regarding assigning limited resources for different departments. Most*
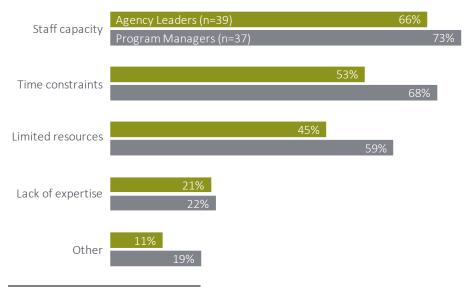> *often the research and evaluation work is the first to be cut." – Program manager*

Three others noted specific ways in which there was **institutional support that did not necessarily suggest a stronger organizational value.**

> *"I think there is a high level of commitment at the program level. We have had a*
> *harder time seeing how other managers can make changes based on this data and,*
> *thus, seeing its regular usefulness." – Program manager*

Staff capacity and time constraints are top barriers.

When given a list of possible barriers, agency leaders and programs managers **most frequently selected staff capacity**[13] as a barrier to broader adoption and expansion of organization-wide client feedback processes (64% and 73%, respectively), followed by **time constraints** (51% and 68%). Program managers were more likely to select "**limited resources**" compared to agency leaders (59% and 43%) and only about one fifth selected "**lack of expertise**" as a barrier. These results are shown in Figure 14.

Figure 14 | Reported Barriers to More Broadly Adopting and Expanding Organization-wide Feedback Practices

Staff capacity
- Agency Leaders (n=39): 66%
- Program Managers (n=37): 73%

Time constraints
- 53%
- 68%

Limited resources
- 45%
- 59%

Lack of expertise
- 21%
- 22%

Other
- 11%
- 19%

---

[13] Capacity is a tricky word to reliably interpret and is often used without enough context to understand if respondents are speaking to staff time, staff skills, staff expertise, or something else. We want to refine the use of this term in future surveys.

These themes were similar to agency leaders who had already expanded feedback work into other areas of their organization (67%, 26). Of those, 10 agency leaders needed more staff time/capacity (or money for FTE or dedicated staff time) to expand the work even more broadly, and five needed more resources that didn't specifically relate to staff needs.

Among those who hadn't yet expanded the work (26%, 10), three agency leaders noted TA needs, and three noted funding needs to expand their work more broadly.

L4G is frequently helping embed feedback as a regular organizational practice and leading to some meaningful changes within grantee organizations.

Agency leaders were asked the open-ended question, *"How has your organization changed the way you think or talk about feedback loops or the role of clients for program improvement and outcome attainment?"* Twenty-eight of the 39 agency leaders responded.

Seventeen leaders shared ways that **feedback-related work was becoming a more regular practice in their organization**, such as discussing in weekly staff meetings; developing and using new tools and processes (e.g., an issue/resolution tracking tool and process); incorporating both listening to and meeting client needs in staff evaluations; actively looking at results each week; and doing monthly check-ins. Of the 17 examples of practices, eight were specifically about **staff engagement**. Eight leaders also talked about **changes in organizational values** related to this work, including organization-wide goals that have been set, increased transparency with clients, and increased primacy of client needs and wants. These kinds of value changes or impacts were also rated as benefits of L4G by roughly three quarters of agency leaders.

"[L4G] is changing how we work organizationally."
– Agency leader

These responses align with agency leaders' perceived benefits of L4G engagement, with almost 80% reporting their organization has experienced an increased focus on clients.

> *"We are very excited about the ways in which feedback has informed our work and allowed us to be much more responsive to client opinions." – Agency leader*

> *"Implementing the L4G program has been hugely instrumental in developing a culture around client satisfaction." – Agency leader*

Alternatively, fewer agency leaders see more connections with other organizations as a benefit of L4G.

Figure 15 | Agency Leader Perceived Benefits from L4G Engagement (n=39)

☑ Takeaways: Institutionalizing Feedback Practices

- **Intentions to sustain and expand upon initial feedback efforts seem high**. Some organizations have already expanded the work, and most plan to continue and expand going forward. Conditions that appear to support ongoing use of client feedback, including leadership support and new organizational practices and norms, also seem to be gaining traction.

- We should **keep an eye on upcoming concerns related to staff capacity and time issues.** While grantee organization staff share mostly positive intentions for the future, these grantees won't experience a change in the level of funding support in Year 2, so they won't yet have to grapple with fewer resources to help cover the staff time needed for implementation and analysis.

Section V

Looking Ahead: Considerations

The data described so far represent the experience of the first rounds of L4G, which are one year into a two-year process. As this is being written, new cohorts are coming on board, with new TA providers and changes to the funding model. Shared Insight and L4G team members are also considering ideas about future iterations and the opportunity to "open up" the tool and benchmarks to the sector more generally. In this section, we share thoughts and considerations for the upcoming year for this cohort of grantees, as well as thoughts for future iterations.

Year 2 for the 2016 Cohort

1. **Grantees are still iterating on and experimenting with survey design and data collection.** While the assumption may have been that organizations would need less support over time, it may be that they are tackling trickier issues as they get more comfortable with more straightforward feedback work. For example, we see evidence that grantees are continuing to refine what they want to learn about through custom questions or are thinking about how to survey clients in populations or programs that are harder to survey. These issues around design and data collection also seem to benefit most from more customized, ad hoc types of supports, which could test the bandwidth of L4G staff as organizations continue to refine and expand their feedback practices.

2. As described earlier, **the real work of effectively implementing and using feedback in organizations may be less sequential than the original series of steps suggests.** While the steps provide useful concrete timepoints for TA support and engagement, L4G staff may want to consider whether it is useful in Year 2 to frame some of this work more iteratively or cyclically

to help program managers and agency leaders think differently about what an ongoing practice looks like.

3. **Agency leaders who have already expanded feedback in their organizations commented that staff time, dedicated staff, and resources are still needed to expand more broadly.** Resources and time were also cited by those agency leaders who hadn't yet expanded but shared what they would need to do so. This cohort of grantees has the same amount of funding for Year 2 and may be more susceptible to facing a "cliff" of changes in resources at the end of the grant. Could there be more explicit TA around how to sustain the work beyond the grant? Should there be dedicated conversations to ease that transition?

Suggestions for 2017 Cohorts

A new round of grantees will soon be coming on board, with a different grant amount and a different amount and structure of resources. We asked the members of the 2016 cohort to comment on what to preserve, what to cut, what to add to the website, and other suggestions for greater scale.

1. **Some clear themes emerged around what TA components to preserve.** Comments from program managers highlighted two areas to preserve:

    – Specific *types* of content: 13 respondents made comments about specific topical areas they felt should be preserved, including survey design (6, including specific comments about question design among 3 respondents), interpreting results (6), data analysis (4), and data collection (3, including the survey process and SurveyMonkey set up).

    – Specific *methods* of providing TA: 13 respondents spoke specifically to how the TA had been provided. The most common comments were about the value of ad hoc and individualized TA, but a few mentioned specific attributes, including responsiveness and level of expertise.

2. **Most program managers didn't know what to cut or didn't think anything should be cut from the current offerings of TA.** Of the 24 who responded, 12 said *"nothing," "NA," "no,"* or *"not sure."* Four respondents mentioned webinars, and two mentioned fewer required elements in lieu of ad hoc support as needed.

3. **Program managers were asked for suggestions for scaling support:** (a) what could be added to the website that would be useful, and (b) other suggestions to offer support to organizations at greater scale.

   – **Overwhelmingly, program managers want more examples from other L4G organizations on the website.** Ten respondents spoke to wanting examples. Often there weren't specific suggestions of what to share, but several noted examples of closing the loop, and one-off suggestions included examples of data analysis, sample results, and custom questions. Slightly different but related were two requests for templates, including printable checklists and reporting templates in a form other than PowerPoint. Just as many respondents said the website was good or there was nothing to suggest.

   – **Program managers most commonly suggested group capacity building/peer learning opportunities for scaling support.** While webinars get more mixed results on their helpfulness and came up as a small theme in what to cut, five respondents specifically suggested them as ways to support group learning. General comments about peer support and peer learning were the most common type of response. Two suggested more convenings, one asked for an annual convening, and one suggested regional convenings. An additional two suggested grouping organizations by similarities to help facilitate the learning process, and one suggested Slack instead of Google Groups as a sharing platform. While there is clear recognition that these kinds of group opportunities could streamline TA provision, it's worth noting that, in the current cohort, only 36% of agency leaders noted that *"more connections to other organizations"* was a benefit of being involved in L4G, by far the lowest rated category. (The next one, *"increased internal capacity to communicate with clients regarding feedback and organizational response,"* was 69%, one third higher.) It's worth thinking about and monitoring how group TA approaches are received going forward.

4. **We should learn more from the 2016 cohort about ongoing costs they experience in Year 2.** The new cohorts will receive fewer resources in Year 2, with the assumption that costs should be higher in the first year. Learning more over the next year can help identify ways to think about supports and expectations in light of this change.

Opening up Questions and Benchmarks Data on SurveyMonkey

L4G has provided supports and resources to organizations that want to experiment with what is intended to be a scalable model for nonprofit feedback practice. Though piloting un-supported use of the questions and benchmarks is still in the future, there are a few considerations based on the evaluation findings to date.

1. Because the benchmarks are more recently available and few of the 2016 L4G cohort grantees have had the chance to see changes in their scores against the benchmarks over time, we will know more about this facet of the work toward the end of the first rounds of grants. Staff recently raised an observation that the non-profit field, compared to the for-profit field, may be less accustomed to the use of benchmarks as a concept or ethos. If this is believed to be true, it may be worth thinking about what kind of strategy would be needed to soften the ground in the sector more broadly ahead of making benchmarks publicly available.

2. Within the timeline of Shared Insight's overall work, there's been messaging that gathering client feedback is the *"right thing, the smart thing, and the feasible thing."* In the data, we're seeing themes—at least among these earlier adopters—that the *"right thing"* messaging seems most aligned with those who are taking up the work. We're seeing many comments about the degree to which the feedback work is gaining momentum because of fit with an organization's strategy, culture, and/or values, versus it being the *"smart"* or *"feasible"* thing to do. As the pool of L4G grantees increases, it will be interesting to see if this focus shifts, but it may provide some early insight into communications about the opportunity for the future.

3. With the benefit of this cohort of grantees who are engaged in their second year of feedback work, L4G could develop new resources or materials to support a greater number of organizations. Suggestions include: specific examples for each step in the feedback process across organizations of different sizes and focus areas; templates for things like sharing back findings; banks of custom questions; and tips to support meaningful survey design and effective data collection.
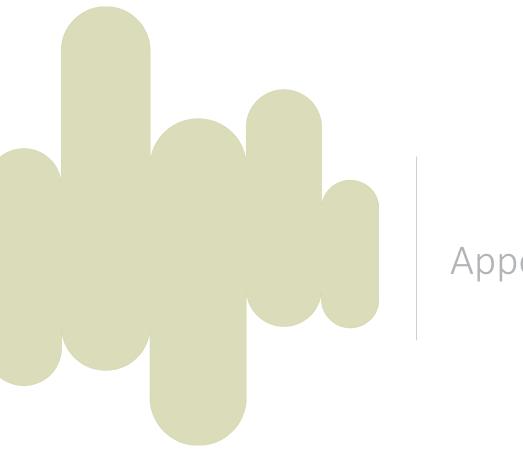
Conclusion

L4G was conceived of as an experiment to scale a *"simple but systematic and rigorous way of getting feedback from the people at the heart of our work."* **One year in, the initial 46 L4G organizations are taking on feedback work in a meaningful way through collecting and analyzing feedback, making changes based on the feedback, and closing the loop with their clients**. These organizations report a strong intent to not just continue but to expand their feedback work, suggesting feedback practice is becoming part of the organizational culture and not just a short-term grant-supported project that will conclude with grant funding.

We hope the lessons learned from these grantees can help L4G staff reflect on implications for supports and TA for the remaining time of this cohort, as well as consider how to incorporate lessons into new 2017 cohorts and beyond.

The findings in this report will be built on in the three-year look back evaluation, where we provide additional insights from a subset of grantees around their feedback practice work. This will be shared in early 2018. Next year will also bring the end of the two-year grant period for this L4G cohort, concluding the formal supports provided to grantees. This is a time ripe for learning, and we will implement an additional survey to hear from this inaugural cohort, as well as conduct an additional follow-up with a subset of organizations to see if they do indeed sustain the work. The findings from these data collection efforts will also be provided in early 2018.

Appendices

Appendix A: Response Rates

Of the 46 L4G grantee organizations, a total of 45 (98%) had at least one member of their organization respond.

Table A.1 | Program Manager and Agency Leader Response Rates

L4G Round	Agency Leaders	Program Managers
Round 1 (n=17)	82% (n=14)	94% (n=16)
Round 2 (n=14)	86% (n=12)	93% (n=13)
Round 3 (n=15)	87% (n=13)	73% (n=11)
Combined (n=46)	85% (n=39)	87% (n=40)