

## Moving towards a new normal: How to influence more nonprofits and foundations to embrace feedback

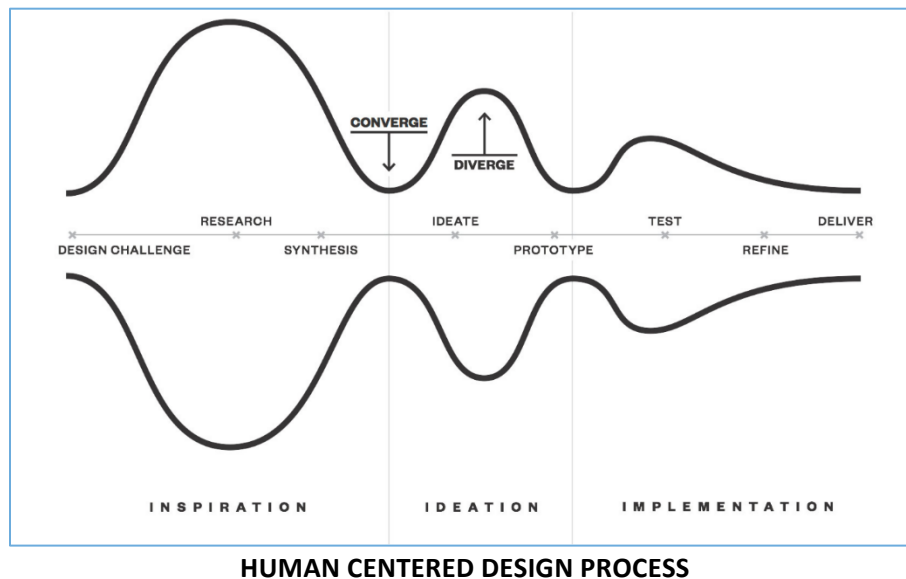
Shared Insight Gathering

Breakout session – Wednesday, May 23 from 9:00-10:15am

Facilitators: Brad Dudding, Center for Employment Opportunities and Lindsay Louie, Hewlett Foundation

### MEETING AGENDA

We applied the ethos of Human Centered Design to the question of how we can influence more nonprofit sand foundations to embrace feedback.



First, people paired up and each spent 10 minutes interviewing each other to answer the following questions:

1. What's the current state of feedback loops at your organization?
  - a. How well do staff/constituents understand the "why" and the "how"
  - b. What has been enabled by listening and responding to constituents?
2. What's the desired future state of feedback at your organization?
  - a. What has inspired you over the last two days to add to this vision?
  - b. What would this new state of feedback enable in your organization?

The goal of the listener was to be a really active, engaged listener and ask open-ended, empathy-focused questions to help them better understand their partner's experiences.

Then pairs joined up at their tables, and together discussed:

1. Based on your interviews synthesize the desired future states of your group
  - a. What are three or four common themes of the future state?
  
2. Then, How Might We get there with collaborative mechanisms?  
 Ask yourselves what’s needed to transition to the desired future state.
  - a. How might we develop the capacity collaboratively?
  - b. How might we create the campaign collaboratively?
  - c. How might we build the platforms collaboratively?
  - d. What else might we do together?

**MEETING NOTES FROM SMALL GROUPS**

Note: Some notes were turned in on post-its so they are under “additional notes.”

**Table 1 (Brian Walsh reported out):**

TODAY	TOMORROW
Unfunded/overloaded	Funded, expected, asked about
“Feedback”	Way of working (integration, collaboration)
Opt-in	Opt-out
Special project	Part of operating rhythm
Innovative	Normal
Scary	Exciting (and scary!)
Burden/distraction	Gift
	<ul style="list-style-type: none"> <li>- EDI data broadly collected and disaggregated to make important insights/decisions about programs</li> <li>- Beyond informing/improving programs, to informing and improving policies</li> <li>- More consultants/TA/resources to help orgs do feedback loops – these would be tiered to the right size/scale and be accessible/affordable</li> <li>- Talent development/workforce training (Measurement and evaluation practices of the future)</li> <li>- Feedback as a priority for funders/grantees and appropriate resources provided to capture and use it</li> <li>- Beneficiary feedback informs strategy at foundations (not just to tweak programs at grantee orgs)</li> <li>- Clear and accepted link between</li> </ul>

	<p>feedback and outcomes (not just a cost/burden/hassle/distraction)</p> <ul style="list-style-type: none"> <li>- Bottom-up: Bring front-line staff in the process (so as not to be top down, shift the power even within organizations)</li> <li>- Help calibrate the processes and strategies</li> <li>- Closing the feedback loop with sector-specific learnings and best practices</li> </ul>
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How might we (HMW) get from TODAY to TOMORROW?

Practice ideas/questions:

- HMW integrate community members/beneficiaries onto staff/boards?
- HMW have funders ask about feedback in proposals and reporting?
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Talent ideas/questions:

- Trainings, tutorials, case studies to help nonprofits learn to do this (FBL, platforms, other)
- HMW create “feedback internships”?
- HMW train the next gen of leaders / Measurement and Eval folks on feedback (integral into universities, etc.)?

Cost ideas/questions:

- HMW make this (L4G) sustainable after initial 2-year grant?
- HMW incorporate costs/capacity for capturing and acting on feedback into nonprofit budgets?
- HMW provide general operating support so that feedback is part of regular operations?

**Table 2 (Aaron Jacobs did report out):**

Common themes in “future state” of feedback influencing the social sector:

- Ceding power, reciprocal relationships
- Repercussions internally, internal and external impacts
- Habitual practice
- Accountability system
- Changes your theory of change
- Expanding/incorporating impact evaluation into everyday work

How might we:

- Move beyond individual orgs to networks
- Embed coach in entire nonprofit community
- Gather surveys and share feedback among community
- Shared accountability and understanding
- Funders sophisticated collaboration among one another
- Encourage funders to participate in L4G in staff and partners

**Table 3:**

Future state:

- Feedback drives continuous improvement and excellence (embedded into operating model)
- Resources (skills, capacity, staffing) are available to continue the work and are operationalized
- Feedback supports advocacy with policymakers and is highly valued by decision-makers
- Beneficiary/client voices are given priority over funder/NP agendas (valued by decision-makers)
- Tools are easy to customize for context
- Use feedback to present a collective interest to others (i.e. funders, policy makers): (1) to do advocacy for needs, (2) to support feedback work

Ideas:

- Shared infrastructure:
  - o Call center
  - o Question bank for custom items/formats
  - o Comms template/toolkit for internal and client use (NFP example)

**Table 4:**

What's important:

- Communication
- Creativity
- Co-creation with clients
- Engagement (board support, integration with strategic plan)
- Internal capacity
- Cooperation with contracting agencies
- System-level view in addition to individual orgs
  - o Maybe one question shared across a network or system that captures the network-view?
- Capacity
  - o Shared capacity across community
  - o Peer learning groups
- Campaign – certification program and/or seal?
- How together?
  - o Helps build a case for funding
  - o Builds community buy in

**Table 5 (Andrew Brower reported out):**

How might we (HMW):

- Get our organization to the next level?
- Stay relevant to our community?
- Recognize the needs within student sub-groups (versus treating them all the same)?
- Make feedback integrated into all of our routine business practices rather than an add-on or nice to have (strategy, reporting, grant seeking, etc.)?
- Learn from other organizations (e.g. Cleveland Clinic, some companies) who have integrated feedback well? What are shining examples?

- Work on staff/internal feedback at our organizations to build that capacity?
- Make feedback training normal/common/expected?
- Draw on feedback to inform/tackle strategy and strategic issues and decisions?
- See more flexibility and agility in grantmaking processes (adaptation over a grant period vs. rigidity)?
- Work with funders to actively hear and respond to feedback nonprofits are getting?
- Shift feedback from a “should” to a “solution”?
- Help our nonprofit clients learn about surveys and ratings?
  - o Build their skills to take surveys/use ratings
  - o Build their self-advocacy capacity, model how to advocate for yourself and your family
- Influence consultants to do and enable and support more feedback work?

Other thoughts/notes:

- Helpful that the L4G tool is a brief survey – core component
- Feedback loop
- Shining examples help – showing that orgs that do this are stronger and more responsive to clients

**Additional notes on post-its from across the tables:**

- More nuanced and dis-aggregatable ways to slice the data
- How might we... empower, share power, cede power
- How might we... be trauma informed
- How might we... be board accountable
- How might we... develop a shared view as to why we are doing feedback?
- Are we missing people?
- Staff have more heart – stop hearing from top people, “Clients whine”
- How do we surface/change/end unconscious incompetence?
- How do we change our boards?
- How do we process feedback to the CEO?
- How do we cede power downward?
- How do we manage goals, not projects – defined by our mission?
- How do we let clients know the importance of surveys and to take them honestly because it can benefit and improve the change?