



FUND FOR SHARED INSIGHT

Feedback Field Assessment Findings

November 2018

Introduction

To work toward the goal that:

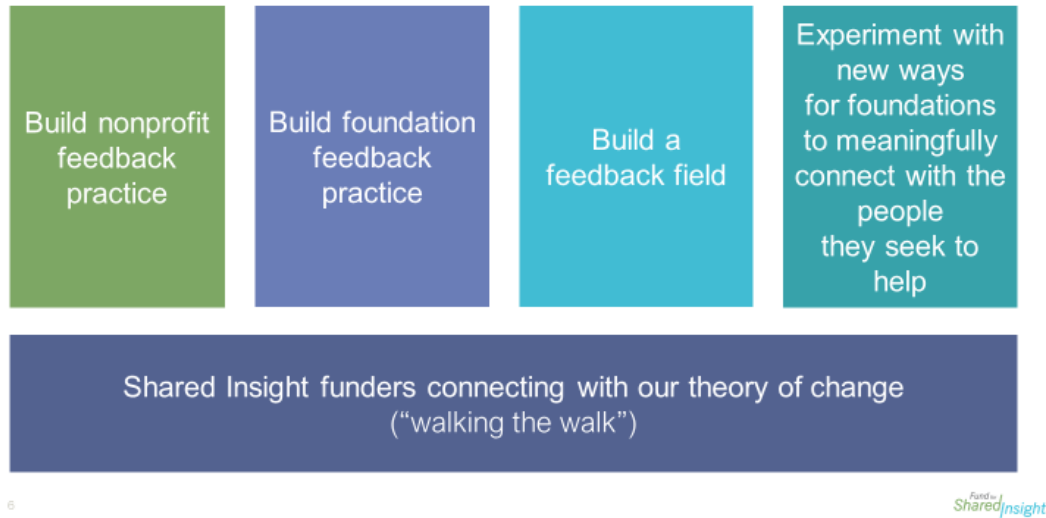
“Foundations and nonprofits are meaningfully connected to each other and to the people and communities [they] seek to help, and more responsive to their input and feedback,”

the Fund for Shared Insight (Shared Insight) is building a feedback field to support the use of high-quality feedback between nonprofits, foundations, and the people they seek to help as one of the focus areas of the current theory of change (Figure 1).¹

¹ The full set of information from this part of the theory of change can be found in Appendix A.

Figure 1 | Shared Insight's current Focus Areas

FUND FOR SHARED INSIGHT FOCUS AREAS



Field building can be an important lever for change at scale, creating the conditions within which organizations and individuals can coalesce and advance around a common goal. While ORS Impact provided a cursory assessment of the status of the field as part of the three-year lookback evaluation, this assessment, created for the Core Funders, seeks to

- more comprehensively describe the current status of the feedback practice field;
- call out areas of strength, gaps, and opportunities; and
- set a bar against which to measure progress over time.

This memo presents our findings and assessment of the field and lays out some key questions for the core funders to consider.

Defining the “Field”

For this work, we defined the “field” as **a community of stakeholders using similar approaches to make the use of high-quality feedback standard practice in the social sector.**² The Strong Field Framework identifies five components of a field: shared identity, standards of practice, knowledge base, leadership and grassroots support, and funding and supporting policy. Table 1 details these components and their definitions.

² The Strong Field Framework. The Bridgespan Group, 2009. <https://irvine-dot-org.s3.amazonaws.com/documents/64/attachments/strongfieldframework.pdf?1412656138>.

Table 1 | Strong Field Framework

Component	Definition
Shared Identity	<ul style="list-style-type: none"> Community aligned around a common purpose and a set of core values
Standards of Practice	<ul style="list-style-type: none"> Codification of standards of practice Exemplary models and resources (e.g., how-to guides) Available resources to support implementation (e.g., technical assistance) Respected credentialing/ongoing professional development training for practitioners and leaders
Knowledge Base	<ul style="list-style-type: none"> Credible evidence that practice achieves desired outcomes Community of researchers to study and advance practice Vehicles to collect, analyze, debate, and disseminate knowledge
Leadership and Key Constituency Support ³	<ul style="list-style-type: none"> Influential leaders and exemplary organizations across key segments of the field (e.g., practitioners, researchers, business leaders, policymakers) Broad base of support from major constituencies
Funding and Supporting Policy	<ul style="list-style-type: none"> Enabling policy environment that supports and encourages model practices Organized funding streams from public, philanthropic, and corporate sources of support

In considering a more detailed field assessment, a key step was to define what we mean by “feedback practice field.” Following the Bridgespan Group’s guidance⁴ to define the field as narrowly as possible while respecting natural boundaries, we first defined the “feedback practice field” as:

the set of leaders, advocates, academics, and consultants who seek to improve how organizations listen and respond to clients’ needs and preferences by defining and advancing a shared vision around systematically seeking perceptual feedback from their clients, facilitating alignment among stakeholders, setting shared standards, providing technical

³ While the Strong Field Framework calls this component “Leadership and Grassroots Support,” Bridgespan acknowledges that “grassroots,” in the traditional sense, may or may not be critical to every field. For the purposes of this report, we are calling this component “Leadership and Key Constituency Support” for clarity.

⁴ Ibid.

assistance, conducting research and evaluation, and helping align public policy and funding streams.⁵

While Shared Insight is interested in feedback practices for funders and nonprofits, our exploration focused primarily on feedback practice for direct service nonprofits in the US. Thus, most of our findings focus on this aspect of the field.

Using interviews with key informants spanning these field actors and an online content analysis of available data, we collected data on each of these components to assess the current status, strengths, limitations, and opportunities that may lie ahead.⁶

Findings: Current State of the Feedback Field

Based on the data and the Strong Field Framework, this section lays out key findings for each of the key components of a strong field. For those who prefer an overview before diving into the details, a summary table of findings can be found on page 13.

Shared Identity

As stated in the Strong Field Framework, a shared identity is the foundation for any field of practice, providing similar motivations and goals to support productive efforts across individuals and organizations.

Shared Identity Assessment: A sense of shared identity is the strongest current aspect of the field to support greater feedback practice. There is generally alignment across an array of actors around the definition and goals for the field in this area, and the differences seem to be in roles or vantage point versus differences that are in tension with each other. Additionally, the field still seems to be coalescing around terminology, with relevant content showing up using a number of different key terms which could make it harder for newer stakeholders or potential new leaders to find, build upon, and learn from work to date. There is also an inconsistent but, in some cases, strong basis from which issues of equity, diversity, and inclusion (EDI) can continue to be fundamentally built into the goals, values, approaches,

⁵ For the purposes of this assessment and Shared Insight’s current work, we are narrowing the focus to feedback practice in the United States. We have not included practitioners of feedback (those in nonprofits who are engaging in the day-to-day work of implementing feedback practices) except for those who could be identified as practice “leaders.”

⁶ A full explanation of our methods and sampling approaches can be found in Appendix B.

Shared Identity

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and practices of the field. Given the focus on listening to voices least heard and the potential for significantly changing power dynamics between organizations and the people they seek to help, it is worth keeping an eye on how to be sure the aspects of EDI that are included are built upon and strengthened over time.

Supporting data:

- Among leaders in the field, there is **strong agreement around a field focus and goals that are aligned with Shared Insight**: building the practice of collecting perceptual feedback from the people organizations serve so that services can be improved and be more responsive to people’s needs and preferences.
 - 11 of the 13 respondents we spoke with had a definition closely related to Shared Insights’; those that differed or expanded upon that definition usually talked about “voice” more broadly, going beyond getting feedback from beneficiaries about their experiences with organizations that would support improvement.
 - There is also strong agreement that the field has achieved consensus about the definition of and value for feedback over the last few years.
 - The bellwethers we spoke to provided additional weight of evidence to this finding; while there were just three we spoke with, they shared similar definitions of feedback and agreed that there had been progress more broadly around value for and attention to the idea of feedback in the sector.

- While there is some variability around whether interviewees focused on more tactical or aspirational field goals, **none were in opposition to a broader vision of feedback** as a more standard practice that ultimately empowers the people organizations seek to help to have better lives as a result of the feedback they provide.
 - About half of the interviewees emphasized changing power dynamics and the value of listening to voice. About half spoke to a more vision-focused goal of the field creating greater value for the lived experiences and “indigenous wisdom” that people receiving services bring.
 - About another half spoke to more tactical goals of the field, focusing on feedback practice becoming standard and/or that the field provides tools and standards.
 - We took differences in description of the field’s goal to largely reflect interviewees’ vantage point of the field; additionally, many gave multiple answers, encompassing both the more visionary goal and more pragmatic shorter-term needs.

- Interviewees' **goals for the field reflect a mix of a pragmatic focus on practice change with goals that reflect a focus on inclusion and greater equity.**

 - While few explicitly tied the goal to equity, about half of the interviewees did speak explicitly to the field's goal being about greater voice, greater representation, empowerment, changing power dynamics, greater humility, and greater responsiveness.
 - Those who focused more exclusively on feedback practice typically talked more about setting a new sector norm, having a "north star" for high-quality practice, and creating greater nonprofit uptake.

- There is an **established, relatively small, interconnected community of stakeholders**, but interviewees acknowledge the need for growth beyond the current group for the field to really take hold. See more findings related to this in the "Leadership and Key Constituency Support" section.

- Our online content analysis suggests there is currently a **lack of a leading terminology** in use.

 - We reviewed 36 Google pages and 364 individual search results for "beneficiary feedback," "beneficiary voice," "constituent feedback," "constituent voice," "feedback practice," and "perceptual feedback." Of these results, 93 were deemed relevant, that is relating to perceptual feedback collected from end beneficiaries by organizations in the social sector in the US. Most relevant results came from the terms "constituent feedback"(35), "constituent voice"(23), "beneficiary feedback"(18), and "beneficiary voice" (11).⁷
 - "Feedback practice" as a term had no relevant entries and brought up content related to teachers' engagement with students. "Perceptual feedback" had six entries, all connected to Shared Insight work, but quickly turned into content focused on a range of issues, from psychology to the creative process to medicine.

- In addition, while our design focused on US work, we did code data if it had a global focus. Overall, **amounts of relevant content increased when including global examples**, though with some differences in the most prominent terminology.

 - Relevance increased significantly, going from 93 relevant to 191, with the bulk of content coming from results related to "beneficiary feedback" and "constituent feedback" (77 and 51, respectively).

⁷ Details on the online content analysis methodology can be found in Appendix B.

Standards of Practice

Within the Strong Field Framework, standards of practice are meant to reflect codified practices among those engaged, with supports like training, accreditations, and systems to ensure quality. For our purposes, we defined “standards of practice” content as that which explored/defined the characteristics of a high-quality method to collect beneficiary feedback, including resources, tools, guidelines, or other materials to support the implementation of feedback practices among US-based direct service nonprofits.

Standards of Practice Assessment: There is consensus that this is a natural next area of focus for field work, and this seems to be underway. Some related resources already exist in the field to support nonprofit practice, providing a base for continued work to build upon. There is room to grow, with an opportunity to ensure a focus on EDI is included in the work from the beginning.

Supporting data:

- Current field leaders agree that **standards are where the field needs to focus now.**
 - 10 interviewees acknowledged that either there are no standards or standards are in very early stages. Codification for high-quality feedback currently acknowledged include those by Listen for Good, Feedback Labs, and Keystone Accountability.
 - A draft set of principles, as shown in Table 2, was developed and circulated this fall at the Feedback Summit, an event for leaders of the feedback field organized by Feedback Labs.

Table 2 | Draft Principles for Standards of Practice

The Why of Feedback
1. People are the experts of their own lives and feedback facilitates their agency.
2. By listening and acting on feedback, we (providers and funders) are working to shift power to people we seek to help.
3. Listening to and acting on feedback as part of the normal course of operations creates a culture of responsiveness and learning that makes interventions more effective.
The How of Feedback
4. Feedback is gathered through deliberate and safe conversations with people, not about them.

Shared Identity

Standards of Practice

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|---|
| 5. Sharing and interpreting feedback with the people generates mutual understanding, insights, and solutions. |
| 6. People’s feedback is acted upon and results in tangible changes that are communicated back to people providing feedback. |
| 7. Feedback data are shared with relevant stakeholders to promote transparency and eternal learning. |
| 8. Gathering and using feedback does not harm people who offer their perspectives. |

- There is some evidence of a **growing alignment with Shared Insight’s definition of quality feedback**⁸, including the inclusion of “Closing the Loop” as a key part of feedback practice.

 - Among those search results that were relevant and related to standards of practice, we did not find any that were clearly not aligned to Shared Insight’s definition of feedback practice. Results were either aligned or did not have enough detail to clearly show alignment or lack thereof.
 - 16 of the 27 standards of practice results (59%) included references to closing the loop as a type of activity addressed. Several key informants also credited Shared Insight with expanding the focus of feedback to include this facet over the last few years.
- We found 27 **resources online from an array of authors covering many aspects of a high-quality feedback practice**, many of which focused on data collection (93%), but many also supporting analyzing feedback data (67%) and responding to feedback (74%).
- 12 of the 27 results (44%), **nearly half, explicitly addressed EDI** within the content in several ways: six entries pointed to three different resources that mentioned data disaggregation, three entries linked to the Keystone Accountability website which offers an EDI survey, two different resources mentioned shifting power, and one entry mentioned representation of different groups of constituents.
- We didn’t hear about or find examples of other aspects of standards, such as trainings and accreditation.

⁸ Shared Insight’s definition of a high-quality feedback loop includes engaging in systematic feedback collection over time, reflecting on and using the feedback collected, and attempting to communicate back what is heard.

Knowledge Base

The Strong Field Framework notes that a knowledge base provides credible research to confirm the efficacy of core practices of a field. We defined content that supports a knowledge base as that which included research, evaluation, or opinion pieces about feedback practice.

Knowledge Base Assessment: This is a ripe area for more growth to support high-quality practice. There may be opportunities to make existing research more accessible and available. In the US context, there is an opportunity to consider how to build EDI into the field early on.

Supporting data:

- In our online content analysis, **we found 10 results pointing to seven pieces of related research.** Items were coded as research if they were found in academic journals or scholarly articles or presented findings based on a review of other information sources. A list of the materials we found and coded as “research” can be found in Appendix C.
 - Some academic researchers focus on constituent feedback and nonprofit performance measurement that is related but unconnected to Shared Insight.
 - Research previously funded by Shared Insight did not emerge through our process; research cited by interviewees did not typically come up through our online content analysis.
- **Shared Insight, Feedback Labs, and other general sector publications (e.g., CEP, SSIR) were cited as “go to” sources** by interviewees when we asked where they go to learn more about feedback.
- **Results in the Knowledge Base area had the weakest connection to EDI.**
 - Of the seven pieces of related research, five did not have an explicit EDI focus or connection, and two could not be coded because of availability (paywall or broken link).
 - Of the 10 results, the authors represent a mix of men and women but also seem to largely be authored by white researchers and consultants.

Shared Identity

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Leadership and Key Constituency Support

The Strong Field Framework notes the importance of influential leaders and organizations across key segments, as well as strong support from major constituencies.

Leadership and Key Constituency Assessment: Not surprisingly, given the development of the field to date, there is a small set of known key leaders who are recognized as pushing the field forward thus far. Broader engagement and support among constituencies is growing but nascent.

Supporting data:

- **A few key leaders are regularly recognized.** Shared Insight, Keystone Accountability, and Feedback Labs were widely recognized as field leaders among those we talked to.
 - Based on interviewees' answers to "who are you connected to that is working on feedback?", we did a rough analysis of the connectedness among those in the field right now. While this doesn't provide an accurate picture of the current network, it did suggest that the network is distributed and not centralized around any one person or institution, though it is also a fairly interconnected network, with a lot of leaders in the field sharing connections.
 - Our online analysis of relevant results showed that about one third of the relevant materials we found (32 of 93) were generated by our interviewees, most frequently with Keystone Accountability/David Bonbright and Valerie Threlfall as authors (14 and 8, respectively).⁹
 - We also found some examples where individuals doing this work as grantees of Shared Insight are becoming practice leaders and champions more broadly.
- There is **diversity across some dimensions** among those we spoke to, **though less racial diversity** currently.
 - While we intentionally sought perspectives from those with different vantage points on the field, we were able to speak to individuals who support the infrastructure of doing feedback (e.g., Feedback Labs, Keystone Accountability), researchers, and those working to advocate and build demand for feedback practice (e.g., funders, practitioner leaders).
 - Although we did not ask specifically about individuals' personal backgrounds, we know that we had a mix of men and women among our interviewees and suspect that many in our sample would identify as white. When analyzing authors connected to relevant

⁹ Because so much of Feedback Lab's work is global in nature, they did not come up as often. The next most frequent search results, with four each, included Deborah Visser of Citi Foundation; Duncan Hanks, an Organizational Development consultant; LIFT; and Roy Steiner.

search results (to the best of our abilities), we found a similar pattern. Of the 46 individually named authors associated with relevant results, 40 were white, four were Asian American, and two were African American. While the exact numbers may be imprecise, the pattern is clear.¹⁰

➤ Most agree that uptake among nonprofits and funders, the major constituencies of the field, is currently low but growing.

- When asked about the extent to which they saw commitment to and uptake for feedback practice among nonprofits and funders, our interviewees generally shared that it is either low or emergent, but many also explicitly spoke to the potential for growth.
- Feedback Lab's Feedback Summit has been one of the regular convenings for those working in this space. Based on data they shared, we know that there is a small stable group of 11 organizations who have attended each of the four years it has been held and that the number of interested parties may be increasing. Of the 216 organizations attending in 2017 or 2018, 142 attended one of these years for the first time. While attendance doesn't necessarily equate to active engagement with the field, the growing numbers do suggest a growing constituency around feedback.

¹⁰ Appendix D presents a full list of authors found through our research.

Funding and Supporting Policy

The Strong Field Framework recognizes that dedicated funding and supportive policies can foster development of fields and help them achieve their goals. We largely received information on the status of this component from the key informants we spoke to.

Funding and Supporting Policy Assessment: Currently, Shared Insight is still seen as the key funder for this work, and some concerns exist about the ability of this amount of funding to take the field to the next level. Like the Knowledge Base area, it is not surprising that this component of the field is less developed at this point in time. There is some question about opportunities to build upon successful examples of public sector uptake of feedback practice, given the potential reach/scope of public contracting. We found no specific content in this area that connected to EDI.

Supporting data:

- **Funding is perceived as slim, emergent, and centered mostly around Shared Insight.**
 - Many interviewees acknowledged the importance of Shared Insight as a key funder for helping move the field forward over the past few years, describing the collaborative as “a beach head” and “critical gap funder.”
 - Many also acknowledged that to move to the next wave of broader adoption and development, more funding will be needed for the work beyond the “proof of concept” phase.
- **Little evidence of supportive policies or funding were found online.**
 - Some specific, isolated examples of public sector uptake have emerged in Connecticut and Austin, Texas that were highlighted during the 2018 Feedback Summit.
 - Examples of “policies” for feedback by foundations still appears to be rare and experimental.
 - We did not, however, have a robust approach for identifying or assessing public policies as part of this review.

Table 3 provides a high-level summary of the strengths and weaknesses we’ve identified from the data.

Shared
Identity

Standards of
Practice

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Policy**

Table 3 | Summary of Strengths and Weaknesses by Field Component

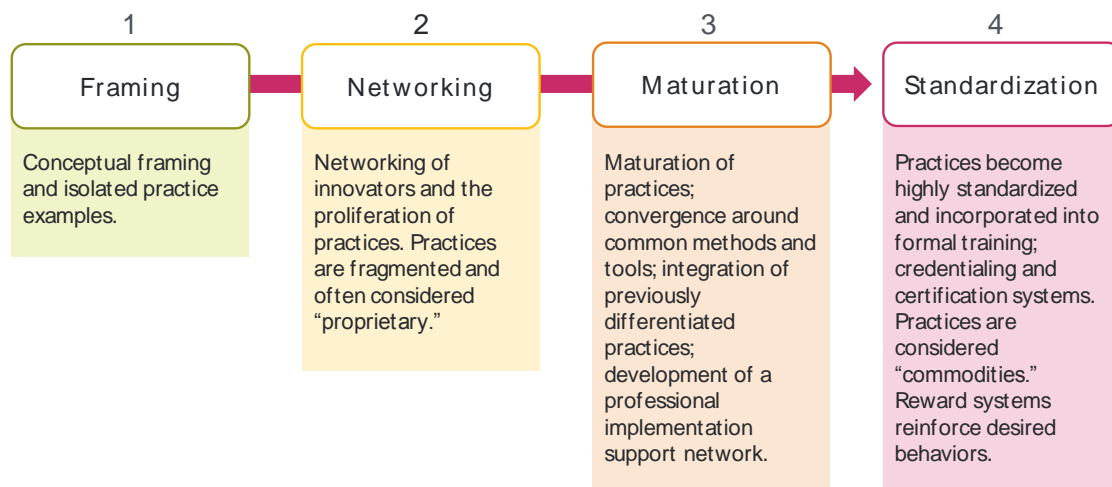
Component	Strengths	Weaknesses
<p>Shared Identity: common purpose and values</p>	<p>Relatively strong alignment across actors about definition of feedback, goal of feedback, and what progress has been made in the past three years. In particular, the concept of “closing the loop” has increasingly become part of how people think about feedback. There is some focus on power and equity.</p>	<p>The set of actors is relatively small in absolute terms and for the goals of the work. While interviewees express common definitions and terms, the review of online documents showed a range of terminology; the field hasn’t necessarily coalesced around common language. A focus on EDI is present but variable in degree of focus and intentionality within the shared identity of feedback.</p>
<p>Standards of Practice: codification, exemplars, resources, professional development</p>	<p>Starting principles have been developed by a diverse group of collaborators (the “irritants”).</p> <p>When describing quality practice, there was a fair degree of alignment across interviewees about key elements needed (good design and implementation of methods, use of data).</p> <p>A wide array of authors has published over 20 documents that provide resources that support nonprofit practice that cover data collection, use; half addressed EDI.</p>	<p>The consensus around interviewees was that there is no or little codification of standards of practice for or resources to support nonprofit feedback practice.</p> <p>While a few consultants for feedback exist, there is not yet wide demand in the market for these services.</p> <p>Resources to support nonprofit practice that we found were of variable depth, completeness, and alignment to quality. Half didn’t address EDI.</p>
<p>Knowledge Base: evidence, community of researchers, vehicles to debate and disseminate</p>	<p>Interviewees frequently cited Shared Insight, Feedback Labs, and Feedback Commons as “go to” sources for information; some infrastructure exists to support ongoing field building. Several interviewees also spoke to other sector dissemination hubs, like SSIR and CEP as sources for information.</p>	<p>Little research emerged from our online content analysis; we did not find products from Shared Insight’s past investments through our process. There is not a clear “hub” or “vehicle” for knowledge.</p> <p>Academics who engage in related work are not connected to current feedback work, nor it to them.</p> <p>Diversity of actors and focus on EDI within products was minimal.</p>

Component	Strengths	Weaknesses
<p>Leadership and Key Constituency Support: diverse influential leaders, broad base of support</p>	<p>A few known influential leaders emerged: Dennis, David, Fay, and Val. The current group of actors is small but interconnected.</p> <p>Belief that this isn't a "hard sell" for nonprofits or funders, key constituents.</p> <p>Some increase in the number of stakeholders as evidenced by Feedback Summit attendance</p>	<p>Nascent area for the field; the engagement with broader constituencies is still underway. Not a lot of racial diversity among leaders currently.</p>
<p>Funding and Supporting Policy: enabling policy environment, organized funding streams</p>	<p>Belief that funders have an important role to play in creating an enabling environment that can support and enable feedback practices among nonprofits. Belief that this isn't a "hard sell" for funders among some interviewees.</p> <p>A few public sector exemplars exist.</p>	<p>Belief that Shared Insight has provided important "bridge" or "critical gap" funding but that it may not be sufficient to get to the next level of growth.</p>

Overall Assessment, Lessons to Learn

Based on the data from this assessment, it is clear that the field to support high-quality feedback loops is developing and likely moving to a new stage. When looking into the stages of field development, we found an interesting piece of work¹¹ by Pete Plastrik and John Cleveland that describes the evolution of fields. Figure 2 presents the evolution stages of practice fields.

Figure 2 | The Evolution of Practice Fields¹²



Based on this approach, we would posit that the feedback field is moving out of the “framing” stage and more fully into the “networking” stage.

While this approach has a slightly different take on defining field elements than the five components of the Strong Field Framework, it has some useful ways of distinguishing between stages and differentiating “young” and “mature” fields. As shown in Table 4, it is fair to characterize the feedback field as “young”.

¹¹ Fields, Innovations and Places: Three Different Strategies for Social Innovators. Innovation Network for Communities, 2009. <https://www.slideshare.net/johncleveland/fields-innovation-places>

¹² Figure adapted from Innovation Network of Communities, 2009. www.in4c.net

Table 4 | Characteristics of “Young” & “Mature” Fields¹³

Element	Young Fields	Mature Fields
Identity	Confused/multiple identities	Well defined boundaries; easy to know what is “in” and “out”
Frameworks	Lack of integration between frameworks	Strongly shared frameworks (theoretical premises; principles; ways to organized knowledge)
Practice Innovations	Competing “gurus” each of whom consider their ideas and business models to be “proprietary.”	Standardization of methods, tools, enterprises, etc. for implementation
Standards	Lack of standards in all areas	Well-defined professional standards for defining competence & quality (regulatory; skill certification; testing of innovations)
Reward Systems	No real feedback mechanisms from the market	Market feedback matches best practice thinking
Networks	Isolated individual practitioners	Well developed networks for sharing knowledge and best practice
R&D	Investment happens on a haphazard basis	Well organized R&D infrastructure to support innovation

Interestingly, Plastrik and Cleveland share that fields often start with aspirational “movements” that evolve to practice fields, which mirrors the evolution of language around feedback to date. They also suggest that healthy fields support clusters of innovation as the core of field development.

Finally, they share some lessons learned that seem apropos for Shared Insight at this time:¹⁴

- Don’t mistake a “movement” for a “field”
- Field builders often play an important role in transcending the “competing guru” stage
- Many new fields exaggerate their claims (for impact) early on to gain legitimacy
- Many fields try to claim too much territory (“context inflation”) instead of acknowledging the real boundaries of the contributions
- If you push a field faster than it is ready to develop, you can actually slow it down

¹³ Figure adapted from Innovation Network of Communities, 2009. www.in4c.net

¹⁴ Content adapted from Innovation Network of Communities, 2009. www.in4c.net

Strategic Questions to Consider

Shared Insight's initial theory of change had an implicit focus on field building, and while the current theory of change is more explicit, there has not been robust discussion among core funders about how to best support this component of the work. In this section, we lay out some strategic questions that emerged from this inquiry to help provide fodder for discussion and decision making. These topics are based on our interpretations of the data and our own observations as an evaluation partner to this work. In most cases, they are likely things to balance rather than select between. They may also be areas for which the degree of focus and intentionality can and should shift over time as the field develops more fully.

1. Baking in Equity, Diversity and Inclusion

Shared Insight's work is focused on feedback as a tool for hearing from the "voices least heard." As noted in all of the components above, there is some base upon which to build in this area, but also lots of room to grow. Given the current stage of the field, there is a unique opportunity—and, some would argue, obligation—to think about how to foster the inclusion of diverse voices and perspectives in the field's leadership and development and ensure a focus on feedback as a tool for more equitable outcomes, which would help increase the likelihood that EDI would be reflected in the field's standards, practices, research, and other products. How can Shared Insight foster greater inclusiveness and diversity of the field at this stage? How can Shared Insight build upon and strengthen a focus on feedback as a tool for equity? In what facets? Through what strategies?

2. Big Tent/Focused Field

At this year's Feedback Summit, we noticed that the event speakers and organizers had a broad understanding of "feedback", which seemed to be synonymous with a broader value for listening to and honoring engagement of stakeholders in many different ways. The online content analysis showed there are still a variety of terms being used in aligned ways. It is possible to imagine that having an open, broad approach can bring more people in and avoid insularity. At the same time, the Plastrik/Cleveland piece cautions against "claiming too much territory," and too little precision in language and scope could be a threat to the degree to which shared identity and standards of practice can be developed. It is worth further discussion among the core funders and key stakeholders to make strategic choices around this topic, and over time the relative pros and cons can be considered and weighed.

3. Global Field/US Field

As we found in the online content analysis, a fair amount of related work is happening internationally. Shared Insight has decided to focus on the US. Should the field transcend such boundaries? Or are the contexts unique enough that they are separate but interconnected? For a corollary example, we often use our own evaluation field as a model. In our experience, there are lessons to be learned from colleagues who work in international settings, and there are also ways in which the differences in context are meaningful for how to think about an evaluation practice. Having different parts of the evaluation field come together sometimes and advance independently, versus walking in lock step, seems to be the current state of that field. What is optimal for the feedback field right now?

4. Collaboration/Competing Gurus

As noted in the Plastrik/Cleveland work, young fields often have competing gurus; field builders can help advance beyond this stage. At the same time, pushing a field faster than it is ready to develop can prematurely slow field development down. As Shared Insight continues to support the field, there's also the risk/likelihood of being seen as choosing winners and losers or, alternately, forcing collaboration. When thinking about the stage and development of the work, to what degree is it advantageous to support competing leaders/innovations versus fostering more convening/convergence?

Closing Thoughts

In the first phase of its work, Shared Insight supported some of the early champions and helped move feedback from a topic advocated for by a few early champions to a practice that has more agreed upon value and prioritization among a wider set of actors. There is an opportunity now to continue to foster this nascent field to help it grow and stay aligned to core values of the collaborative: a focus on voices least heard, high quality implementation and analysis, use of feedback that respects those giving it and reflects their preferences and lived experiences, and sharing back what has been heard and done. We hope this assessment provides rich fodder for discussion and decision making as Shared Insight continues to live its current theory of change.

Appendix A: Shared Insight’s Current Theory of Change – Feedback Field Component

Theory/Hypothesis

Building individual nonprofit and foundation organizational practices around high-quality feedback loops will not be enough to sustain broad scale practice change. Additional supports and infrastructure will be required to make this a regular way of doing business throughout the sector.

Assumptions

- A field is composed of five components: 1) shared identity, 2) standards of practice, 3) knowledge base, 4) leadership and grassroots support, and 5) funding and supporting policy¹⁵
- We need feedback to be enough of its own “thing” to be able to get the attention it needs to become a regular practice
- There is not enough research about why feedback is “the smart thing to do”
- Research by itself is necessary but not sufficient and it is unclear how important that research will be to influence nonprofit and foundation behavior.
- The existing feedback infrastructure is insufficient to support the mainstream practice adoption we want to see happen with funders and nonprofits

What We’ve Learned:

- The feedback field is nascent but may be at a transition point away from making the case to building up more tools, resources and supports for practice.
- In general, the field is strongest around shared identity and agreement on values and goals
- In general, the field is less strong related to standards of practice, knowledge base, and funding.
- The feedback field is currently fairly defined and confined to a few key actors.

How Does This Reflect Our Equity, Diversity, Inclusion lens?

- We are thoughtful about who is involved in developing the standards of practice
- We seek to have our feedback research reflect different points of view and different research teams that bring diversity to the table
- We prioritize investing in more diverse organizations to lead the growth of infrastructure in this field (e.g. instead of just focusing on the typical white-male-led organizational capacity building organizations or measurement & evaluation consulting firms)

Current and Past Activities	Future Activities
Grants to feedback infrastructure organizations (e.g. Feedback Labs, YouthTruth)	TBD
Grants to fund feedback research (e.g. REDF, IPA)	Possible further feedback research grants to explore the relationship between feedback and outcomes
Shared Insight Gatherings (2016, 2018)	2020 Shared Insight Gathering (proposed)

¹⁵ The Strong Field Framework: A Guide and Toolkit for Funders and Nonprofits Committed to Large-Scale Impact. The Bridgespan Group. June 2009. The James Irvine Foundation.

Train diverse set of technical assistance providers nationwide	Continue training diverse feedback coaches nationwide
	Do comprehensive analysis of L4G dataset
	Engage GuideStar to include feedback as part of core capabilities of nonprofit organizations
	Hold regional gatherings of funders, nonprofits, featuring beneficiaries
	Communications about feedback as standard practice (e.g. three-legged stool of measurement)
	Communications to build feedback knowledge base (e.g. case studies, videos, teaching notes, amplify research findings)
	Create tools and templates that are publicly available for nonprofits and funders to implement high-quality feedback loops

Implementation Markers:

- Develop online technical assistance resources through interactive Listen for Good site
- Train 10+ feedback coaches nationwide
- Increased « airtime » about feedback in philanthropic media and conferences
- Increased « airtime” about feedback in nonprofit media and conferences
- Feedback and three-legged stool of measurement taught in leading academic centers
- Launch Listen for Good public in 2020
- Add more money in the budget for more digging/disaggregating of L4G data by race/ethnicity and other variables; track who is dropping out
- Build upon practices of listening/feedback to add a step of “asking why”

Appendix B: Methodologies

To systematically gather the data to answer the evaluation questions across components, we used two data collection methods:

- Key informant and bellwether interviews
- Online content analysis and document review

Key Informant and Bellwether Interviews

We conducted 14 key informant interviews with stakeholders from a sample of leaders, advocates, researchers, consultants, and funders working to support feedback practice. These key informants provided valuable perspectives about the field's shared identity, the status of the field's standards of practice and knowledge base, the degree of leadership and grassroots support, and the funding and policy landscape.

In addition, we conducted three bellwether interviews with actors from different fields who, although not direct players in the feedback field, had interesting insights or assessments about the field's status. In addition, we used snowball sampling to identify potential new interviewees who would contribute to a robust understanding of the field's status. This process only yielded two additional contacts who fit within our initial definition of key informants, and only one of them completed an interview.

Ultimately, we conducted 17 interviews after inviting 21 interviewees to participate. Table 6 presents a list of interviewees.

To analyze the interview data, we used thematic coding to identify passages from each interview connected to the different components of the Strong Field Framework as they relate to the feedback field. We then analyzed the coded passages by order of prevalence to identify to what extent interviewees had similar or contradictory perceptions, remaining attentive to instances where outlier perceptions provided relevant and valuable nuance or a different perspective.

Table 6 | Key Informant Interviewees

Proposed Interviewee	Leader	Advocate	Researcher	Consultant	Bellwether
Andrew Means (http://meanswelldoesgood.com/)					X
Benny Samuels (NFP)	X				
Brad Dudding (CEO, Feedback Labs Senior Fellow)	X	X			
Brian Komar (Salesforce)					X
David A. Campbell (Binghamton University)			X		
David Bonbright (Keystone Accountability)	X	X		X	
David Devlin-Foltz / Susanna Dilliplane (APEP)			X		
David Silver (Impaq International)			X	X	
Dennis Whittle (Feedback Labs)	X	X		X	
Eva Nico (GuideStar)	X				
Fay Twersky (Hewlett Foundation)	X	X			
Fred Reichheld (Bain & Company)					X
June Wang (Listen for Good/Chang/d Consulting)				X	
Kelley Gulley (Irvine Foundation)	X				
Phil Buchanan (Center for Effective Philanthropy)	X		X		
Sasha Dichter (Acumen)	X	X		X	
Valerie Threlfall (Listen for Good/Ekoute)	X	X		X	

Online Content Analysis and Document Review

The online content analysis allowed for a systematic review and characterization of available online content related to the feedback field. The methodology entailed an analysis of the results within the first 10 pages of Google searches for the following key terms or tags:

- Beneficiary feedback
- Beneficiary voice
- Constituent feedback
- Constituent voice
- Feedback practice
- Perceptual feedback

After searching for each term, we reviewed each individual result; recorded basic information like the title, URL, author, publisher, and date; and coded it according to its

- **relevance to the feedback field:** whether it was related to perceptual feedback provided by end beneficiaries to social or public sector organizations in the US;
- **connection to Shared Insight:** if it mentioned Shared Insight or L4G, if it was published by Shared Insight a partner, a grantee, or another organization;
- **nature and purpose:** the type of resource (e.g., research, article, opinion, resource, general information, or other);
- **relationship with specific components of the Strong Field Framework:** if it related mostly with shared identity, standards of practice, knowledge base, leadership and key constituency support, or funding.
- **focus on specific steps of feedback loops:** which step of the feedback loop it focused on (e.g., data collection, analysis, responding to data, or closing the loop); and
- **alignment with Shared Insight’s definition of feedback loops:** if it agreed with how Shared Insight defines each step of the feedback loop.

By including a large number of result pages in the sample, we used a wide enough net to include existing and readily available information. If a resource exists but does not show up in the first 10 pages of a Google search, we consider it as not readily available, and thus not an active resource to the field.

Finally, when we were coding results for a particular tag, we stopped if we found a full page with zero relevant entries. Descriptive quantitative analysis allowed us to use the resulting database to measure several indicators from the Strong Field Framework tied to this data source.

Strengths and Limitations

In designing the methodology, we considered multiple possible data sources and data collection methods, including surveys with a wider range of participants, network analysis, and media analysis. Ultimately, we decided that a combination of key informant interviews and an online content analysis would provide a balanced mix of perceptions from key

stakeholders who are deeply engaged with the field, and a broader view of the materials and resources available to the general public when searching for information online. We acknowledge that these data sources have strengths and limitations, and discussed them thoroughly in the design phase both internally and with Shared Insight's evaluation sub-committee to ensure the design would yield useful and actionable data while remaining replicable for future field status assessments. Below is a summary of strengths and limitations of our methodology.

Strengths:

- **Data triangulation:** Using thematic coding in interviews combined with online content analysis, we were able to triangulate data to establish check points for our findings, making our final assessments more robust as they do not depend on any one data source or individual perception.
- **Strong interviewee sample:** We are confident that we captured a representative sample of perceptions, as our sample included most of the individuals we had identified as current field leaders, advocates, researchers, and consultants. In addition, we used snowball sampling to expand our sample beyond the leaders we identified internally; however, few leaders identified additional individuals, and those identified were often outside of our initial field definition. Three interviewees from our final sample came from an expanded contact list.
- **Replicability:** One of our main goals through this process was to build a baseline that we could use as a comparison point for future assessments of the field's evolution. Therefore, we designed a methodology and documented our process in a way that ensures replicability, thus allowing us to compare results and assess changes over time.
- **Wide net approach:** The breadth of the online content analysis allowed us to review a wide array of resources about feedback available to the general public through an online search. Furthermore, this methodology allowed us to review existing materials that are readily accessible to the public, which ensures use and uptake.

Limitations:

- **It was not an exhaustive approach:** Although we attempted to cast a wide net, our approach was not exhaustive, so there may be resources out there that we did not capture. In addition, the final interviewee list included people who were relatively close to Shared Insight, which might have resulted in a greater degree of alignment on definitions than we would have found in a broader field definition.
- **Small number of bellwether interviews:** While bellwether interviews were helpful in getting a different perspective on the field's status, we only conducted a small number

of them. Two factors contributed to this issue: 1) Some of the people we initially considered as bellwethers were actually closer to the field than we anticipated, so we treated them as leaders instead; and 2) we contacted some additional people but were not successful in scheduling interviews.

- **Challenges in coding online content:** When coding online content, we often found resources that did not include enough detail or information to assess whether they focused on specific steps of feedback loops or were in alignment with Shared Insight's definitions. We treated this and other instances of imperfect data as missing data and coded it accordingly.
- **Potential variability in results given Google's search algorithm:** While the online content analysis process is itself replicable, we have no way of guaranteeing that conducting the exact same analysis at a later point in time would yield the same results, as the search results may vary based on Google's search algorithm. We have carefully documented the search results that showed up for a specific person, searching specific terms on specific dates and times from a particular location, but acknowledge the possibility that any of those variables may change the search results.

Appendix C: Bibliography of Research found in the OCA

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- Feedback Labs
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