FUND FOR SHARED INSIGHT

Exploring Clients' Feedback Experience

Listen4Good

Introduction

Since 2016, Fund for Shared Insight (Shared Insight) has built nonprofits' capacity to gather and respond to client feedback as an integral part of its efforts to create more meaningful connections between foundations, nonprofits, and the people and communities they seek to help. Listen4Good (L4G), its signature initiative, has worked with more than 200 nonprofits in the United States to implement a systematic way of listening to and responding to feedback from the people at the heart of their work. In addition, L4G has served as a channel to engage funders around how they too may learn from client feedback and include clients in decision-making processes.

ORS Impact has served as the learning and evaluation partner for both Shared Insight and L4G. Our L4G evaluation efforts thus far have explored how nonprofits implement feedback loops, what they learn, what changes they make to respond to feedback, and what funders are learning about feedback. These evaluations have surfaced generally positive learnings about the value of feedback and listening to clients' voices for both nonprofits and foundations, along with opportunities for improvement moving forward. However, we had not explored how clients experience feedback practices or what it meant to them to provide feedback to organizations – until now.

For this study, we worked with L4G grantees (organizations) to conduct focus groups with clients who have provided feedback and have been affected by feedback practices. Focusing on clients' perceptions and experiences with feedback provided an important and different perspective on the impact of nonprofit feedback practice. Furthermore, the study's approach was aligned with Shared Insight's equity, diversity, and inclusion values and with ORS Impact's commitment to equitable and culturally responsive evaluation.

This report describes the methods and design of the study, presents findings about clients' broader perceptions regarding their connections with organizations and specific experiences providing feedback, and posits considerations for learning and decision-making moving forward.

Our Approach

This study combines quantitative and qualitative data from three different sources, as follows:

- **Focus groups:** The main data source are eight focus groups about L4G's feedback process conducted with clients from seven organizations. Focus group data includes quantitative and qualitative data from clients as well as observations from focus group facilitators to provide contextual information that informs the analysis.
- **Interviews:** We also conducted interviews with representatives from the seven L4G organizations.
- **Past surveys:** We explored data from our past L4G surveys to better understand organizations' feedback practices and triangulate answers with their clients' perceptions.

In selecting organizations to partner with in conducting focus groups, we considered that L4G has funded four cohorts of nonprofits under its co-funded model so far – one in 2016, one in 2017, and two in 2018. We chose to focus on the 66 organizations from the 2017 L4G cohort, as they are in a sweet spot in their feedback practice – not as early in the process as the 2018 cohorts, but still within the grant period, unlike the 2016 cohort. We grouped these 66 organizations by geographic location and selected the greater San Francisco Bay Area, Phoenix, and New York, as locations where we could engage at least two organizations in our data collection. We then narrowed the list to 13 organizations by considering which organizations might serve clients who are willing and able to speak with us, and whether our team was qualified to speak with those clients without causing harm, given that some organizations provide services to clients with delicate life and health conditions. We invited those 13 organizations to partner with us and seven ultimately agreed. We conducted one focus group per organization for six organizations and two focus groups for one organization (at two different program sites), for a total of eight focus groups and spoke to a total of 83 clients. Figure 1 summarizes our sample, and Appendix A provides more detail on how we selected the sample of organizations and how those organizations selected clients to participate in the focus groups.

Figure 1 | Overview of the Focus Group Sample

To analyze the data, we explored frequency counts and used statistical analysis for the quantitative data and thematic coding for the qualitative data. We then compared data across types and sources to develop our findings and conclusions. In our analysis, we also looked for differences in clients from different organizational types by dividing groups according to their organizations' service and interaction type. Specifically, we used L4G's classifications of drop-in organizations (where clients receive services as needed, like a food bank) and cohort organizations (where clients have established and periodic interactions with the organization, like a parenting class). We also developed two additional groupings: individualistic organizations (where clients have transactional interactions with the organization and little to no interaction with each other), and communal organizations (where clients have deeper connections with the organization and with each other).

In line with equitable evaluation practices, we provided compensation to organizations and their clients for their time and input in the focus groups. In addition, we worked to ensure that the inquiry process was valuable to all stakeholders by aligning our learning questions with organizations' learning needs in the hope that they might also gain insights from the process. We will engage directly with organizations to share findings from their specific focus groups while protecting participants' identities, and we will request that they share findings with the clients who participated in the focus groups.

Findings

In the focus groups, we explored client perceptions and experiences related to two major themes. First, we looked into clients' meaningful connections with their organizations, defining "connection" broadly as interactions that go beyond transactional relationships. In addition, we discussed clients' experiences with providing feedback through L4G surveys and other channels. This section summarizes our findings organized around these two themes.

Connecting with Organizations

To explore how clients experience providing feedback, we asked them if they want to connect with these organizations and how important it is for them to have opportunities to do so. Clients generally indicated that they value connecting with organizations and are happy to provide feedback. For some, this feedback process positively impacted how they feel about the organization, and most feel that their voices and opinions matter.

Clients feel it is important to meaningfully connect with organizations, and most were happy with the opportunity to do so by providing feedback.

Clients from all focus groups highlighted the importance of having opportunities to more meaningfully connect with organizations that provide them with services. In particular, clients from four focus groups mentioned that opportunities to connect show the organizations' care and compassion for clients and help them to feel safe and cared for. Clients from three other focus groups highlighted opportunities to connect with each other. In one focus group, participants discussed how connecting with organizations allows the organization to more readily improve because it is more in tune with the clients' needs. In another focus group, multiple clients described how--coming from a difficult life situation--the organization helped them feel valuable by connecting with them.

> **Participant A**: *It is important because it helps our self-esteem and gives us value to the place that we live.*
>
> **Participant B**: *Especially coming from homelessness where hope kind of deteriorates and vanishes… when they start asking questions it's like, ok… 'do you really want to know'?*
>
> **Participant C:** *Yeah, when you are homeless your opinion doesn't matter.*

A majority of clients in six out of eight focus groups (72%) mentioned that they felt happy when asked to provide feedback. The remaining 28% (a majority in the other two focus groups) felt neutral about providing feedback, and no clients reported negative feelings. Clients from four focus groups reiterated that asking for feedback shows the organization cares about them, and clients from three others highlighted that feedback is an important mechanism to improve programs and services. In one focus group, this way of giving voice to clients was described as a way to further support the cultivation of trust between clients and the organization. On the other hand, clients who felt neutral mentioned that it costs time and energy to provide feedback, especially when the survey is exhaustive or particularly long, as described in one focus group. For others, the experience can be less positive if they feel obligated to provide feedback, or if they experience survey fatigue.

When we looked at different organizational types, we found that the L4G feedback process added value in different ways for different groups. Specifically, participants from drop-in and individualistic organizations were significantly[1] more likely to report feeling happy when asked for their feedback than those from cohort and communal organizations. We hypothesize that these clients have fewer opportunities to interact with organizations, making this survey a valuable feedback opportunity. Meanwhile, clients from communal organizations were slightly more likely to believe their voices matter to organizations, making this feedback process a way for them to voice their opinions.

In more than half of the focus groups, the feedback process has changed how participants feel about the organization.

In four out of seven focus groups[2], participants mentioned that the feedback process had changed how they feel about the organization. They said they feel more confident going to the organization because they think that someone is supervising the staff's work, they feel "taken into account[3]," they have higher self-esteem and are motivated to keep doing their part, and they are appreciative of both providing feedback that will lead to changes and of the organization's intention to improve programs even more.

Among the three focus groups where participants did not suggest a change in how they felt about the organization, clients from two of them already exhibited a highly positive perception of the organizations, so it is unclear whether those feelings could change dramatically due to the feedback process. In one focus group, participants' responses were somewhat less favorable as they mentioned that things were still the same and that the organization still had a lot of changes to make.

[1] $p < .05$
[2] Participants from one focus group did not answer this question.
[3] "Taken into account" is the English translation of a popular Spanish phrase "tomados en cuenta," which refers to feeling that one's opinions and needs matter and are taken into account in decision-making processes.

Most clients feel their voice matters, but some questioned whether the dynamics of a specific organizational structure hampered their ability to affect change.

Overall, the vast majority (92%) of clients felt that their voice matters to the organization. When they were asked what makes them feel that way, clients from three focus groups described how individuals working at the organizations ask clients how they are doing personally, making them feel important and that the organization genuinely cares. Clients from three other focus groups described how the organization cares for the clients' voices through the programs and services offered; and in two of these focus groups, clients commented on their organizations' commitment to the mission of supporting clients. The two other focus groups described specific resources or programs that are responsive to the clients' needs. Other reasons that clients feel that their voices matter include the responsiveness and follow-through exhibited by organizations, the act of intentionally making time or accommodating for clients and asking for clients' opinions. Most clients felt that their voice matters more at L4G organizations than in others they have engaged with.

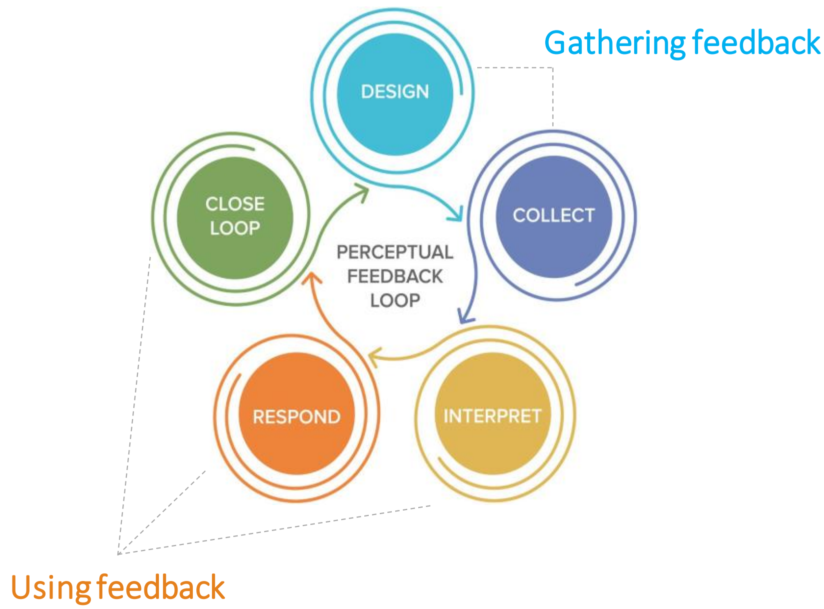
However, in four focus groups at least one individual was either unsure or felt their voice did not matter to the organization. They discussed the limitations of how much they could actually change with their voice given the organization's decision-making structures. As participants in one focus group shared, an organization can *"listen to you but not actually hear you or take what you say seriously,"* and that feedback may be received differently depending on the day or individual within the organization with whom they speak. In addition, clients from two focus groups raised questions about the extent to which their voices truly matter given the power dynamics related to their organization's structure. These two organizations are divided into multiple sites managed by an offsite central office. While feedback was somewhat easier within the sites, there were questions about whether feedback would make it to the top to influence decisions at the central offices.

Providing Feedback

When asked how well the L4G feedback survey was working for them, overall clients felt happy with the survey, with some notable exceptions. For our analysis, we condensed L4G's five-step feedback process into two sections, as shown in Figure 2:

- Gathering feedback (survey design and administration)
- Using feedback (interpreting results, responding to feedback, and closing the loop)

Figure 2 | L4G Feedback Process



Gathering Feedback (Survey Design and Administration)

The majority of clients felt happy to complete the survey, except for young clients and those who did not observe changes in response to feedback.

Overall, more than half (59%) of all clients reported feeling happy to complete the survey. In six focus groups, the majority of clients reported feeling happy to complete the survey, and when asked why, clients from three of these focus groups mentioned that asking for feedback showed that the organization cared, and that it gave them the opportunity to share what was already on their minds. Clients from two other focus groups felt that providing feedback was a good thing to do because it helps the organization improve and it gives the organization a chance to hear their clients, while clients from another focus group felt that providing feedback reminded them of the organization's good work.

In the other two focus groups the majority of clients were neutral or unhappy when completing the survey. Both of these focus groups were with young clients, ranging from middle school students to young adults. This pattern caught our attention given past analysis of L4G data that shows that young people tend to rate lower in the Net Promoter Score (NPS) scale question. Additional analysis of focus group data revealed that young clients are significantly[4] less likely to feel happy about being asked for feedback, which might be related to their lower NPS ratings. Two young clients who felt unhappy

[4] $p < .05$

mentioned that it takes time away from other activities they would rather do as it was administered during down or play time, another one mentioned that it wasted time because nothing changed as a result of feedback, and another said that clients might not have time to fill out the survey. Similarly, clients who did not see changes in their organizations were significantly[5] less likely to feel happy when completing the survey than those who had seen changes.

Most focus groups gave additional feedback on the survey, ranging from comments on specific questions to confusion about the entire survey.

We asked organization staff to rate the degree to which they think clients understand survey questions on a scale of one (low) to five (high). All organizations gave themselves a rating of three or four, except for one organization that did not provide a rating.

To verify how well clients understood survey questions, we first asked specifically about the NPS questions since they are an integral part of the L4G survey. All focus groups had clients who liked either the scale and/or the open-ended NPS questions. Clients who liked the NPS questions mentioned that the scale question was well worded, while the open-ended NPS question allowed them the opportunity to voice their opinions and to further explain the rating they gave. In contrast, clients from two focus groups who did not like the question mentioned that it was hard to understand due to translation issues and that it was too general, making it difficult to answer.

> *Well yes because it makes you think. You are going to have to specifically detail and if its not 100% then say it in regards to the second question. Because nothing is perfect in this world. And I know they want feedback on how they can improve.*
>
> *- Focus group participant.*

While most other comments related to specific questions, a participant from one focus group raised design concerns about the entire survey and many others agreed on the confusion. Specifically, clients were confused about which organization or program to reflect on when answering survey questions because their organization has multiple sites with various (often different) programs at each site, and clients can access them all at any given time. As a result, they were unsure how to rate their experience when it varied depending on which program or which site they attended. We will share suggestions on specific survey questions directly with the organizations.

[5] $p < .05$

Survey Language Difficulties

We spoke with Spanish-speaking clients in two focus groups and found language issues in both of them. In one focus group, clients had concerns about the survey translation, with one client mentioning that the translation was so difficult to understand that she reverted to using the English version. In the other focus group, two participants were not comfortable speaking either in English or Spanish and reported completing the surveys at home with their husbands, who also had limited proficiency in English and Spanish. We learned from the organization that they have staff available to help clients in those circumstances by verbally facilitating the survey process, if the clients request the help. As evidenced by the two clients in the focus group, not all clients who need assistance request it, so there may be a gap in understanding the survey and being able to communicate their feedback accurately. While L4G and organizations have taken steps to address these issues, these cases illustrate the challenges they face when working with linguistically diverse clients.

Using Feedback (Interpreting Results, Responding to Feedback, and Closing the Loop)

Most organizations have feedback channels in addition to the L4G survey, and some include clients in other decision-making processes, but it is unclear what proportion of clients access these opportunities.

Clients from seven of the eight focus groups identified ways they can provide feedback to their organization other than the L4G survey. Clients from all seven groups identified informal feedback channels, and clients from three groups identified more formal channels including other surveys and different types of group meetings. Clients from the seven focus groups suggested ways they might like to provide feedback, including using a suggestion box and giving feedback verbally through phone or in-person conversations with staff. Meanwhile, the one organization with no additional feedback channel has a repeated drop-in model where clients receive urgent individual services, and all clients from that focus group were happy to provide feedback to the organization.

When providing details about other feedback channels, staff from two organizations commented on L4G's added value as illustrated in the following quotes:

> *I had heard that there were a lot of random surveys going out every so often [to] the participants and they were getting pushback from that because they felt like they're being over-surveyed, and didn't always understand the purpose or how the information was being used. Around the same time the Listen4Good opportunity came up and it was a beautifully streamlined.*
>
> *- Organization A*
>
> *There's all these questions and we would collect all this data and then it, it basically sits in my brain. We have it, we have it scanned into our computers so anybody can look at it, but it's never been loaded into any program where we could quantify it… So honestly, the first quantitative information we ever had was in that very first, Listen4Good survey."*
>
> *- Organization B*

We also asked clients if they had participated in decision-making processes other than the L4G surveys. Clients from three focus groups identified having additional processes to provide input for decision-making, which were verified by organization staff. These activities included group brainstorming to respond to feedback or provide program improvement ideas, client advisory councils, and an internship opportunity for clients. This internship opportunity seems to be an added benefit of the feedback process, as clients who participate can more formally assist in the feedback process and raise their colleagues' voices. However, only a few clients in each focus group mentioned participating in these processes, making it unclear how many clients truly have access to these communication channels.

Organizations continue to face challenges with closing the loop, as most clients don't know what organizations learn from surveys and don't see the changes made in response to feedback.

In a survey conducted 12 months into their feedback grant, all but one of the participating organizations reported having a way of closing the loop with clients. Of these, five reported having moderate ability in closing the loop with their clients, while the other two organizations did not answer the question. In interviews conducted prior to the focus groups, six organizations reported closing the loop with clients. Nevertheless, the vast majority of clients (90%) did not know what their organizations had learned from the surveys or what they planned to do with the feedback received. This pattern holds across all focus groups. Clients in five focus groups expressed interest in learning what their organization was doing with their feedback. When asked how the organizations might close the loop effectively, five focus groups suggested sharing learnings in person because doing so allows for clarifications and for deeper connections with the staff to be formed. Four focus groups suggested that organizations share learnings on paper that could then be posted on a bulletin board or handed to the clients while another focus group suggested that organizations share learnings via email.

We also asked organizations what changes they had made as a result of the feedback they received and compared them with the changes clients identified during the focus groups. Overall, six organizations reported making changes in response to feedback, but participants observed those changes in only three of them. In two others, changes were difficult to perceive by participants as the changes entailed adjusted program frequency and a strategic decision to refrain from opening the program to different populations given security concerns identified by current clients.

Considerations

This section identifies some considerations and questions for Shared Insight and L4G as they make decisions for current and future users of the L4G feedback model.

The L4G survey is working well, but there are opportunities for some organizations to improve its design and administration to drive greater client inclusion, and L4G could help.

Multiple clients from one focus group expressed confusion about how to complete the entire survey given their organizational structure and unclear survey instructions. There were also comments about specific survey questions from multiple focus groups that we will share with each organization individually. These comments suggest an opportunity for organizations to review and revise their survey tools to ensure that questions and instructions are as clear as possible. L4G coaches could assist with that process taking into account how clients experience each organization's survey.

These focus groups provide additional insights into how young clients experience providing feedback and completing the survey, illustrating that adjustments in the timing and the way surveys are administered might improve their feedback experience. Another well-documented challenge has been accurately translating L4G surveys into different languages. L4G has already worked to improve this issue, but challenges remain for organizations both in translating surveys on paper and in providing assistance to clients who might not feel comfortable reading and responding in a common language.

Clients have mostly positive experiences providing feedback, but certain organizational types might require additional steps to ensure client feedback reaches decision-makers and that clients are aware of their feedback's value.

While most clients are happy to provide feedback and feel that their voice matters to the organizations, clients from organizations with a specific type of structure (a central office that manages various sites remotely) felt less certain about their power to affect decision-making. Because L4G intentionally engages organizations to use feedback as a client inclusion mechanism, it was interesting to hear that clients still wonder if their feedback reaches decision-makers at the central office.

L4G's technical assistance could help this type of organization by 1) structuring feedback practices in a way that ensures that both site-based and centralized decision-makers take client feedback into account, and 2) closing the loop effectively so that clients are aware of the process and the value of their feedback. An important issue to consider is how L4G can foster conversations around equity, diversity, and inclusion given that the new web-based model does not offer feedback coaching.

Closing the loop ensures client inclusion and equitable practices, and it can help clients feel better about providing feedback over time; however, organizations continue to face challenges in doing so effectively.

Closing the loop can inform clients of changes made in response to feedback or how the organization is using client feedback. Focus group data shows that clients who see these changes are happier providing feedback, which might lead to more candid or detailed feedback over time. Therefore, the evidence suggests that in addition to the ethical value of closing the loop, there is a practical benefit for organizations. Nevertheless, most clients still report that they do not know what their organizations are doing with feedback and in most organizations, clients are not aware of changes made in response to their feedback. This finding underscored the challenges that organizations have reported so far in closing the loop and, at the same time, elevates its importance to drive increasingly effective feedback loops.

Conclusion

Speaking directly to clients about their experience in providing feedback to nonprofits gave us a different vantage point in assessing how the L4G model works in practice. Overall, clients are happy to provide feedback and the survey seems to be working well for most clients. Nevertheless, there are opportunities to drive better inclusion practices throughout the different steps of the feedback process. Importantly, organizational and client characteristics can affect the extent to which L4G's feedback loops are effective, which warrants specific attention moving forward, particularly considering the change to a web-based model and a potential increase in diversity among the participating organizations and their client base.

Appendix A: Sample Selection

Organization Selection

In selecting organizations to partner with for the focus groups, we considered the following criteria:

1. They were among the 66 organizations in the 2017 L4G cohort;
2. They had a good number of feedback surveys completed;
3. They had a program model and client population which allowed for data collection that was not disruptive or that required expertise that ORS staff does not have (e.g., populations with special needs).

We ultimately invited 13 organizations to partner with us and seven agreed. Those who declined to participate mentioned that while the research was interesting, the timing was not right at the moment, or their program design made it difficult to identify and invite clients given that surveys are anonymous.

Client Selection

We worked with each of the seven organizations on how to best identify, select, and invite clients to participate in the focus groups.

Identifying clients

Because the L4G surveys are anonymous, the first step was to identify clients who had already completed the survey. This process was easier for organizations with a cohort or sustained client interaction as their program design made it easier to know who might have taken an L4G survey (i.e., clients who participate in a specific class where the survey was administered.) These organizations already had a list of clients they could invite. For other organizations this process was more difficult as they had to being by creating that initial list of clients to invite.

In both cases we advised organizations to make an “open call” to all clients who might have filled out a survey, inviting them to self-select to participate in the focus group by requesting more information. Having an open call where all potential participants learned about the study and the incentive they would receive ensured an equal opportunity to participate. In summary, we encouraged organizations to use the following guidance:

1. Select and invite clients who have taken the L4G survey at least once;
2. Have an open call to inform clients about the goal of the study, logistics, and the incentive they would receive for participating;

3. Attempt to have a good representation of the population served, without selecting “hand-picked” clients.

In gratitude for their partnership in preparing for these focus groups, partner organizations received a $500 honorarium from Shared Insight, while clients who participated in the focus groups received a $50 visa gift card.

Limitations

We intentionally designed this study to include focus groups with clients from a subset of L4G organizations as we thought this approach would provide a better and more nuanced understanding of clients’ feedback experience. We also recognized early on that there were tradeoffs in choosing this approach and that there would be some limitations to our findings. Below is are three main limitations:

1. **Non-representative design:** By design, the participating organizations were not representative of all L4G organizations, as we intentionally targeted a specific type of organization within the 2017 cohort. In addition, clients who participated in the focus groups were not a representative sample of all clients within the participating organizations. Sources of bias in client selection included clients’ ability to self-select into the focus groups, and the possibility for organizations to choose who to invite to participate. While we tried to mitigate the latter, we had little control as we opted to give organizations autonomy given their knowledge and proximity with clients.
2. **Language limitations:** We attempted to be responsive to language preferences and conducted two focus groups in Spanish so that clients could express themselves in their native language. However, one of those focus groups included two participants who were not fluent in English and only proficient in Spanish – their native language is an indigenous language from Mexico. The facilitator took steps to engage them individually in questions, rephrasing or explaining as necessary to establish a conversation. However, the exchanges may not have been as rich as they might have been in their native language. Organizations did not request facilitation in any other language.