



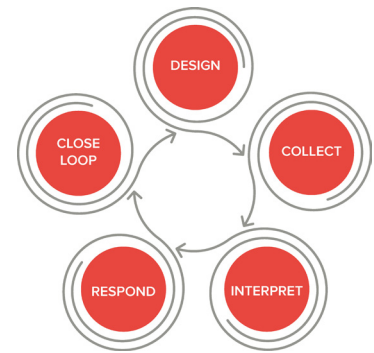
LISTENING TOGETHER: A Discussion Guide for Funders and Nonprofits

An Overview

We believe, and our experience has shown, that by taking the time to listen to the voice of nonprofit clients, both funders and grantees will become closer to the people they ultimately seek to help – leading to more effective programming and better client outcomes.

Our Listen4Good (L4G) feedback initiative is designed to help organizations implement the five steps of a high-quality feedback loop.* We also offer guidance and support to funders and grantees as they move through the feedback process.

We recommend that nonprofits and their nominating funders meet at least two times over the grant period. The goal of the first meeting is to align on the goals of the work. The goal of the second meeting is to inform the important steps of interpreting and responding to feedback.



* 5 STEPS OF A HIGH-QUALITY FEEDBACK LOOP

MEETING NAME	WHEN TO MEET	MEETING OBJECTIVE(S)
Meeting I – Goal-Setting	After nonprofits receive the grant, but before deeply implementing L4G	<ul style="list-style-type: none">• Discuss mutual goals and expectations for L4G• Brainstorm potential issues to explore through L4G
Meeting II – Feedback Debrief & Response Planning	After nonprofits interpret client feedback (post Step 3)*	<ul style="list-style-type: none">• Share insights from client feedback (and from the process of gathering feedback more generally)• Brainstorm potential responses to feedback



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Note for Funders: When funders have multiple grantees in L4G, they may elect to hold the Goal-Setting Meeting with more than one nonprofit at a time if this is needed to reduce overall workload. However, we strongly recommend that the Feedback Debrief Meeting be limited to one nonprofit at a time to promote a candid discussion of feedback results.

Guiding Principles for Funder-Grantee Engagement Around Feedback:

These meetings do more than simply keep funders in the loop. They also facilitate a shared learning mindset, reminding everyone that funders and nonprofits are “in this together.” Further, these meetings give funders the information they need to improve their grantmaking by learning more about the needs and experiences of nonprofit clients. Ideally, funders and nonprofits will also partner together to determine how they can mutually respond to client feedback in the most effective way possible.

However, we know that having open conversations between funders and nonprofits can sometimes be challenging, especially when it comes to discussing critical client feedback results.



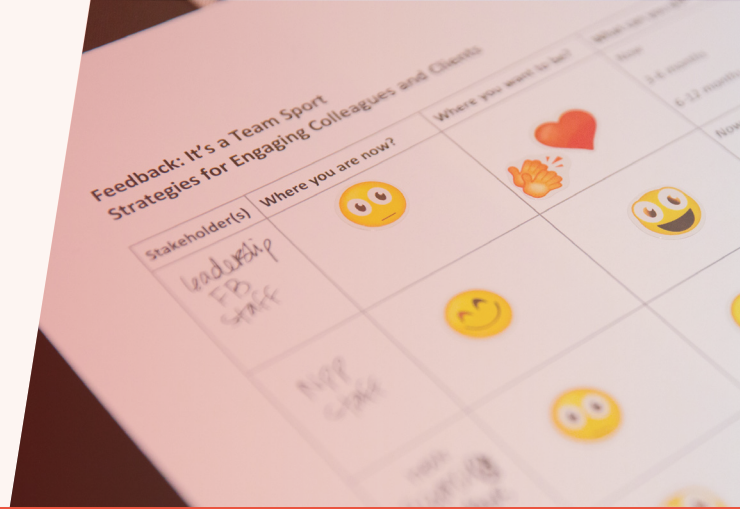
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So, what's the best overall approach to these meetings?

Every funder-nonprofit relationship is different, but here's our best advice:

FUNDERS

- **Be open** – Approach these conversations in a spirit of continuous improvement. These meetings are not about grading nonprofit performance; rather, they are about building an authentic partnership with nonprofits about their feedback experience.
- **Be supportive** – If nonprofits disclose that they received critical client feedback, don't be judgmental. Instead, ask yourself: How can you help them respond and improve?
- **Be prepared** – Be ready to communicate your guardrails to nonprofits – i.e., what you can and can't do to help them respond to client feedback.
- **Be creative** – There are many ways to support nonprofits throughout the feedback process (e.g. convening other grantees in L4G, providing referral partners to address gaps identified in client feedback, connecting nonprofits to capacity building or expert resources).
- **Be authentic** – Recognize and acknowledge the embedded power dynamic in all funder-grantee relationships. Thank nonprofits for taking this feedback journey with you!



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So, what's the best overall approach to these meetings?

Every funder-nonprofit relationship is different, but here's our best advice:

NONPROFITS

- **Be transparent** – Your funder is your partner on your feedback journey. L4G funders know that receiving critical feedback is just part of the process, and should be willing to partner with you to help learn from the data. Communicate your fears if you have them.
- **Share what matters** – Most funders won't want or need to see your entire client feedback dataset. Instead, be prepared to share with them a cogent summary of your results.
- **Focus on solutions** – It can be daunting to share critical feedback or things that didn't go as planned. You can help mitigate this by identifying solutions in advance and by sharing how you plan to improve going forward.



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Meeting I – Goal-Setting

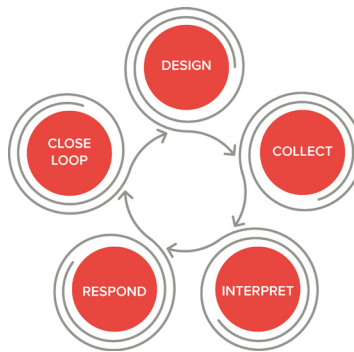
MEETING GOALS:

The Goal-Setting Meeting is an opportunity for L4G-participating nonprofits to meet with their nominating funder to establish shared goals and success metrics. During this meeting, both parties (funders and nonprofits) should share overall motivations for participating in L4G, as well as any specific learning goals they have for participation.

This meeting also lays the groundwork for a future Feedback Debrief Meeting, where nonprofits share high-level takeaways from L4G client feedback with their funder.

WHEN TO MEET:

Ideally, this meeting will occur after nonprofits have formally accepted the L4G grant, but before they have finalized a survey draft and before their Step 1-2* call with their feedback coach.



* 5 STEPS OF A HIGH-QUALITY
FEEDBACK LOOP



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Meeting I – Goal-Setting *(continued)*

FACILITATION GUIDE:

We recommend that both nonprofits and funders fill out their worksheets (below) in advance of the meeting. If desired, you can share your answers with each other before the meeting. *Please note that Q6 on the funder worksheet is intended for internal reflection only.*

As both the nonprofit and funder worksheets ask similar questions, you can easily “compare notes” – looking for areas of alignment as well as areas for further discussion – during the meeting.

For quick reference, the questions correspond to each other as follows:

TOPIC	FUNDER QUESTION #	NONPROFIT QUESTION #
Overall motivation for participating in L4G	Q1	Q1
Specific goals for organizational learning	Q2	Q2 & Q3
Critical feedback/areas for improvement	Q3	Q4
Establishing shared success metrics	Q4	Q5
Discussing survey design	Q5	Q6



Meeting I

Funder Worksheet [Page 1 of 3]

1. What was your overall motivation for joining Fund for Shared Insight and nominating nonprofits for Listen4Good (i.e., what do you hope to get out of doing so)? Why were you interested in nominating [nonprofit name] specifically?

2. What do you hope to learn from [nonprofit name]'s efforts to listen to the people you collectively seek to help?

Meeting I

Funder Worksheet [Page 2 of 3]

3. Let's imagine that [nonprofit name] receives client feedback identifying a clear area for improvement. What are some ways you can imagine working together to respond to this feedback?

4. How do you define "success" in Listen4Good? Are there a few success metrics that you and your nominated nonprofit can agree on together? *(If desired, refer to the Listen4Good Core Competencies document to get a sense of what L4G considers to be the key characteristics and outcomes from having "high-quality" feedback loops.)*

Meeting I

Funder Worksheet [Page 3 of 3]

5. [OPTIONAL – TIME PERMITTING]: Having reviewed the Listen4Good survey template, are there any topics you would want to add to the survey given your vantage point (knowing that survey design is ultimately up to nonprofits)?

6. [INTERNAL REFLECTION ONLY]: Think back to previous experiences (if any) when grantees shared difficult feedback or disappointing results with you. How did you manage the conversation? What was effective? What could you have done better in light of existing power dynamics? How will this experience inform your approach to hearing about client feedback in Listen4Good?



Meeting I

Grantee Worksheet [Page 1 of 3]

1. What was your overall motivation for participating in Listen4Good?

2. Are there specific competencies or organizational “muscles” you hope to build through the Listen4Good process (i.e., designing survey questions, analyzing data, etc.)? *(If desired, refer to the Listen4Good Core Competencies document to get a sense of what L4G considers to be the key characteristics and outcomes from having “high-quality” feedback loops.)*

Meeting I

Grantee Worksheet [Page 2 of 3]

3. What do you hope to learn from your clients by surveying them? Are there specific aspects of client experience that you hope the survey can shed light on (i.e., unmet needs, possible "pain points" like wait times or scheduling, feelings of exclusion by marginalized groups)?

4. Let's imagine that you receive client feedback identifying a clear area for improvement. What are some ways you can imagine your funder to be a helpful partner as you respond to this feedback? While funding is obviously always appreciated, are there also non-monetary ways they could assist you?

Meeting I

Grantee Worksheet [Page 3 of 3]

5. How do you define "success" in Listen4Good? Are there a few success metrics that you and your funder can agree on together?

6. [OPTIONAL – TIME PERMITTING]: Having reviewed the Listen4Good survey template, what are some topics you would want to pursue through your custom questions?



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Meeting II – Feedback Debrief & Response Planning

MEETING GOALS:

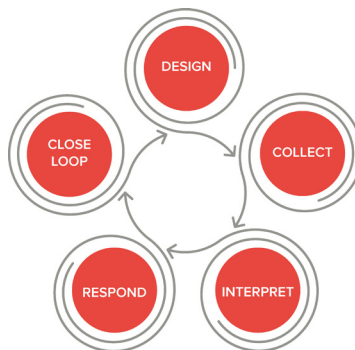
The Feedback Debrief is an opportunity for L4G-participating nonprofits to share high-level client feedback takeaways with their funder, and to start to collectively brainstorm responses to that feedback.

It is also an opportunity for funders to reflect on how they themselves seek feedback and what implications client feedback broadly may have on the foundation's goals and strategy, project prioritization, or portfolio management efforts.

As emphasized throughout this guide, this meeting is not an occasion for the funder to "grade" or otherwise evaluate nonprofits based on their feedback results. In extreme cases, we believe that doing so may lead to "gaming" of feedback results, especially if the power dynamic between funder and nonprofit is not appropriately addressed. Conversations should be in the spirit of continuous improvement.

WHEN TO MEET:

If possible, we recommend meeting after nonprofits have analyzed their client feedback data, but before major responses have been strategized (that is, after the conclusion of Step 3 but before the conclusion of Step 4*).



* 5 STEPS OF A HIGH-QUALITY
FEEDBACK LOOP



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Meeting II – Feedback Debrief & Response Planning *(continued)*

FACILITATION GUIDE:

Before the Feedback Debrief meeting, nonprofits should create a summary of feedback results to share with their funder. This summary should be shared with funders as early as possible, so that funders can review and digest it prior to the meeting.

Note for Nonprofits: There are three resources for crafting your feedback summary available under Step 4 on the L4G web app: 1) The L4G Report Builder, which creates a presentation pulling some of your data directly from SurveyMonkey; 2) A PowerPoint template, for those who desire a greater ability to customize, and 3) Examples of other L4G nonprofits' feedback summaries, to inspire those who want to create a report from scratch.

In addition, we recommend that both funders and nonprofits fill out their respective worksheets (below) in advance of the meeting. If desired, you may share your answers with each other before the meeting.

As with the Goal-Setting Meeting, both worksheets have similar questions to allow for easy compare/contrast:

TOPIC	FUNDER QUESTION #	NONPROFIT QUESTION #
Issues raised by feedback summary	Q1 & Q2	Q1 & Q2
Responding to feedback	Q3 & Q4	Q3 & Q4
Reflecting on the process: revisiting success metrics	Q5	Q5

Meeting II

Funder Worksheet [Page 1 of 3]

1. As you reflect on the client feedback received, is there anything that surprises you?

2. Is there anything else you want to know about the feedback itself (i.e. further analysis to be done)?

Meeting II

Funder Worksheet [Page 2 of 3]

3. What implications do these feedback findings raise for you as a funder?

4. Are there any ways in which you can help [nonprofit name] respond to client feedback (i.e. by providing referrals or introductions, identifying capacity development opportunities, or directly funding needed improvements.)?

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Meeting II

Grantee Worksheet [Page 1 of 3]

1. As you reflect on the client feedback received, is there anything that surprises you?

2. Is there anything else you want to know about the feedback itself (i.e. further analysis to be done)?

Meeting II

Grantee Worksheet [Page 2 of 3]

3. If clients have identified areas for improvement, how do you plan to respond (and are there any barriers to responding effectively)?

4. How can your funder help you respond to feedback (i.e. by providing referrals or introductions, identifying capacity development opportunities, or directly funding needed improvements)?

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