



FUND FOR SHARED INSIGHT

The 2018 Listen4Good Co-Funder Experience

November 2019

Since 2014, Fund for Shared Insight (Shared Insight) has engaged a variety of foundations to promote beneficiary feedback as a way for foundations and nonprofits to meaningfully connect with the people they seek to help. One way in which Shared Insight has engaged foundations is through the Listen4Good (L4G) initiative, where foundations partner with Shared Insight to nominate and co-fund nonprofits to implement high-quality, systematic, client-centered feedback loops. With L4G, Shared Insight hopes that co-funders not only encourage and champion feedback practice among their grantees, but that they incorporate feedback practices within their foundations as well. L4G has launched yearly co-funded cohorts since 2016. This memo presents findings about the 2018 cohorts' co-funders' experiences with L4G and highlights similarities and differences with past funder cohorts.



Methodology and Sample

In August 2019, ORS Impact interviewed 10 of the 14 co-funders who participated in the 2018 L4G cohort about their experience with L4G and their foundations' practices around feedback. We narrowed our sample to focus on staffed foundations¹ and conducted interviews with one representative from each foundation – the staff member who nominated the grantee to participate in L4G (or the staff closest to L4G work if the nominating staff member was not available). In our analysis, we coded the interview data and identified prevalent themes across interviews noting similarities, contradictions, and/or complementary perceptions. We also compared the 2018 results to the 2016 and 2017 results. The 10 co-funders we interviewed funded 41 of the 46 L4G 2018 grantees (89%).

Of the 10 co-funders we interviewed:

- Seven were new co-funders and two of those were Shared Insight core funders² who also newly co-funded in L4G. The other three were returning co-funders from the 2016 or 2017 cohorts.
- Six co-funders nominated and supported multiple grantees: five nominated two to six grantees, and one had the largest L4G cohort among the 2018 co-funders with 19 grantees. The other four co-funders nominated one grantee each.

In addition, the 10 funders represented five independent foundations (including two core funders), three community foundations, one family foundation, and one 501(c)(3) organization, and five U.S. states: California, New York, Hawaii, Oklahoma, and Pennsylvania. Appendix 1 presents a full list of the co-funders we interviewed.

It is important to note that L4G did not have a specific funder engagement strategy for the 2018 co-funders. As a result, new co-funders had limited exposure to feedback practice aside from an initial introductory call and self-directed engagement with their grantees around L4G.

¹ As with past cohorts, we focused on staffed foundations (non-individual donors) because they represent the main type of funding partner Shared Insight seeks to work with in L4G.

² Shared Insight's funder collaborative model includes a group of 13 core funders: foundations that commit a minimum of \$250,000/year for a general project support grant for three years. They also play a key strategic role by joining three in-person core funder meetings per year and participating in the grantmaking process. Core funders have the option of participating as L4G co-funders in addition to their core funder commitments.



Findings

Overall, we found many similarities between the 2018 and past co-funders in terms of their motivation, process for engaging with L4G, positive experiences, and likelihood of continued support for feedback. However, the 2018 co-funders exceeded expectations for changes in funder listening practices. In addition, we found opportunities to improve outreach to foundation staff, particularly among core funders.

The 2018 co-funder experience was largely similar to previous cohorts.

The 2018 co-funder experience was largely similar to the 2016 and 2017 cohorts when it came to motivations for participating in L4G, initiating involvement in L4G, and whether they were sharing their work in L4G with their colleagues and grantees.

- Seven of the co-funders indicated that their foundations initiated involvement in L4G with their grantees, while three responded to a grant request from their grantees.
- All co-funders participated in L4G because of the benefits for nonprofits. These included the belief that feedback is the right thing to do, as nonprofits should engage with and listen to their beneficiaries to better serve them (4), the opportunity for nonprofits to leverage L4G as a source of additional funding for capacity building (3), and that L4G was additive to the work grantees were already doing (2). One co-funder also valued the platform to network with core funders and other partners.
- All but one co-funder considered specific organizational characteristics when selecting whether to fund specific nonprofits:
 - Five selected grantees who had high capacity as it relates to staff, leadership, and organizational budget in order to do the work well.
 - Two chose nonprofits where the L4G work aligned to their mission and values and where grantees would greatly benefit from getting feedback from their beneficiaries. Another two chose direct service organizations because feedback practice seemed most relevant to their work. Two others chose grantees with whom they already had a strong trusting relationship.
 - On the other hand, one co-funder mentioned not engaging grantees working in the advocacy space largely because of their limited capacity. According to this co-funder, these organizations are mostly small in size and the demanding nature of their defensive advocacy work would make their participation in L4G burdensome.
- Nine co-funders said that other staff and/or leadership members within their foundations were aware of the feedback practice work they were involved in through L4G.



- 70% of co-funders cited that their grantees had shared what they were learning from their constituents, including the results of survey data and their takeaways from data collected.

2018 co-funders are exceeding expectations in changing feedback practices and are thinking differently about how grantees and foundations can benefit from feedback.

In 2018, Shared Insight updated its theory of change and developed implementation markers to track progress across different strategies, including building foundation listening practices. Two of the implementation markers within this strategy were that at least 50% of L4G co-funders are making changes [to listening practices], and that 30% of them attribute those changes to L4G.

As Figure 1 shows, within the 2018 cohort:

- Eight (80%) co-funders reported recent changes in their foundations' practice around listening to grantees and/or constituents.
- Four (40%) attributed these changes to participation in L4G, three of whom were returning co-funders from previous cohorts.

Figure 1 | Half of the foundations that **changed practices** attribute changes to L4G



The changes made ranged in type and included:

- Adding new questions to their grantee proposals around feedback practices among grantees (4)
- Creating a new strategy to listen to their community (1)
- Having intentional conversations with their grantees on whether and how they were collecting feedback from beneficiaries and closing the loop (1)
- Surveying and convening grantees as a way to gather feedback from grantees on ways the foundation could better support them (1)



- Involving grantees in strategy development and adapting human-centered design to gather input from beneficiaries on their needs and solutions that work, and/or to seek approval on a particular strategy that the foundation would be implementing (1)

In addition to practice changes, all but one co-funder indicated that participating in L4G has affected their thinking about nonprofits and feedback. For five of them, the importance of feedback has been elevated and it has become more top of mind. Another three were more aware and intentional about feedback practice efforts. Additionally, one co-funder stated that L4G had allowed them to think deeply and in greater detail about the different aspects of feedback practice.

Moreover, eight co-funders cited that their participation in L4G affected how their foundation thought about ways they can benefit from client feedback. Co-funders shared that they were thinking about having ongoing conversations with partners on how to include client voice, how to more intentionally listen to client voice, using client voice to inform the kinds of projects to implement, how staff can *'get closer'* to their communities to better understand their needs, being more intentional around getting input from beneficiaries and how to close the loop, and using community input in grantmaking strategies.

Across cohorts, core funder engagement in L4G has largely been led by their Shared Insight representatives, which has limited the exposure of other foundation staff to feedback work.

Shared Insight core funders meet three times per year and can send two representatives who have decision-making power to help shape grantmaking strategies and decisions. Given their level of involvement, these two representatives know more about Shared Insight's work, including L4G. Interviews with the four core funders who co-funded in L4G in 2017 and 2018 suggest that core funder staff beyond these two representatives might have limited knowledge of the initiative as they are less involved in the work.

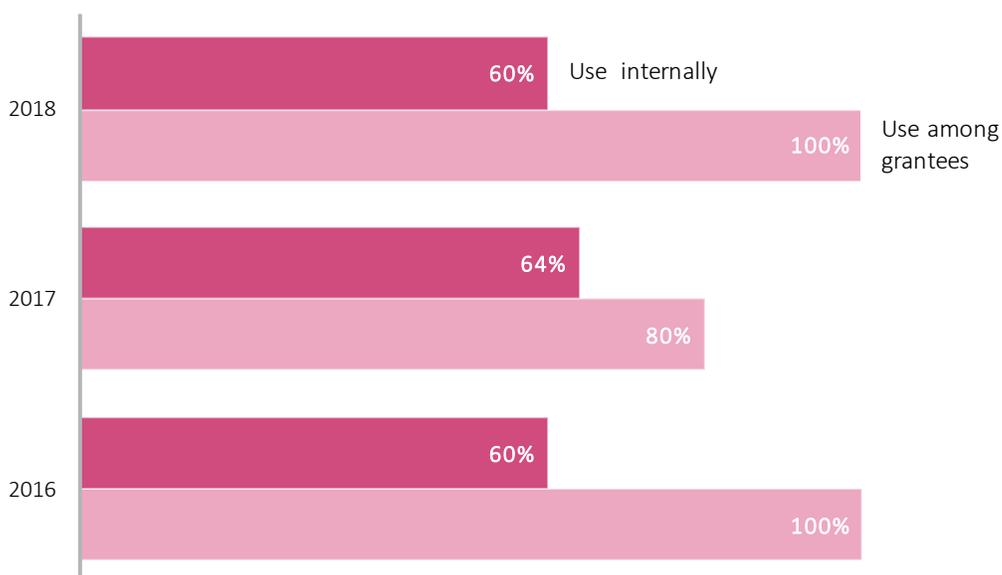
Specifically, in three of the four interviews, we spoke to staff who had nominated L4G grantees but who were not their foundation's representatives with Shared Insight. These three staff members mentioned having limited knowledge about L4G and suggested we speak to Shared Insight representatives for more complete answers to our questions, and in some cases asked to skip questions they did not feel prepared to answer. For the remaining core funder, the representative indicated that the staff member we sought to interview was no longer working at the foundation, illustrating the challenge that staff turnover poses to institutional knowledge. Nevertheless, both 2018 core funders indicated that they have shared their feedback work through L4G with other foundation staff.



Most co-funders are likely to continue funding feedback practice and to increase the use of client feedback within the foundation.

As shown in figure 2, when asked to rate their likelihood of continuing to support and encourage high-quality feedback practice among grantees, on a scale of 1 (very unlikely) to 4 (very likely), all co-funders gave a rating of somewhat likely or very likely. In addition, 60% were somewhat likely or very likely to increase the extent to which their foundation includes constituent feedback in decision making in the next few years. However, they did not have a clear sense of how or when they might use client feedback to shape their work.

Figure 2 | Co-funders were about as likely as past cohorts to continue supporting feedback practice among grantees and using feedback internally



Limited grantee capacity (4) was the most common barrier to maintaining/sustaining support for feedback practice among grantees. Other barriers mentioned included staff turnover and organizational learning culture (how open they were to hearing, learning, and making changes from the feedback they received from grantees or beneficiaries).



Most co-funders had a positive experience with L4G and are interested in exploring different ways to partner with Shared Insight; however, there is room to improve Shared Insight's interactions with co-funders.

Figure 3 | Net Promoter Score



When asked how likely they are to recommend L4G to other funders on a scale of 1 (very unlikely) to 10 (very likely), 90% of co-funders gave a 9–10 rating and one gave a 7–8 rating, resulting in a Net Promoter Score (NPS) of 90. As for recommending L4G to other grantees, seven co-funders gave a 9–10 rating, two gave a 7–8 rating, and one would not recommend L4G to other nonprofits due to having little to no knowledge about their current grantees' experience of L4G, resulting in a NPS of 60.



We also asked this cohort a few additional questions to assess their interest in different ways of partnering with Shared Insight and to understand which L4G elements they are most interested in funding. Nine co-funders expressed interest in exploring different ways to cost share or partner with Shared Insight. When asked which element of L4G they would be most interested in funding, six mentioned capacity-building grants, five mentioned coaching, and two focused on online resources.

Lastly, like past cohorts, we asked co-funders whether they had any feedback on L4G's engagement. While many gave positive sentiments, four would have liked better communication around what L4G is learning or had learned throughout the year. Two co-funders recognized and appreciated the conferences and convenings organized by Shared Insight and although they were unable to attend, they still found these events valuable. Another two would have liked to know how their grantees were doing in the program, while one co-funder expressed the need to identify tangible ways for co-funders to advance feedback work within their own foundations.



Considerations

- 1. Within the co-funded model, there is room to improve funder engagement.** As noted, Shared Insight did not implement a funder engagement strategy with the 2018 co-funders. Not surprisingly, about half of them mentioned wanting more communication and engagement or help in continuing the conversation with their grantees. How can Shared Insight engage co-funders with the right type and amount of touch points to improve their experience? To what extent might this engagement drive further conversations and changes among co-funders?
- 2. L4G remains an important lever to influence co-funders' thoughts and practices around feedback,** but it is unclear how much reach there is beyond individual staff with whom L4G interacts. Across cohorts, funders report that they are making changes and L4G has influenced an important number of them. While most funders report sharing their feedback work with other staff, questions remain about the extent to which other foundation staff know enough to buy into the value of feedback and incorporate the practice in their work. This is particularly evident within core funders, where interviews highlight these concerns and present an opportunity to engage staff differently. In what ways can core funders engage their colleagues around feedback in a deeper, more meaningful way?
- 3. Most foundations are open to different ways of cost sharing and partnering with Shared Insight.** L4G is testing different models and combinations of services for nonprofits. If most co-funders are interested in other ways of partnering and in funding capacity-building grants and coaching, is there a viable option to continue the co-funded model in addition to the online services? If the co-funded model does not continue, how can Shared Insight continue to engage and influence co-funders in its absence?

Closing Thoughts

L4G continues to be a valuable way for co-funders to support organizations in the implementation of feedback practices as they seek to better listen to and serve the people they seek to help. L4G is also contributing to changes in co-funders' thinking and practices around feedback, and most co-funders have reported positive experiences with L4G. Given that there is interest in continuing and funding the model, Shared Insight and L4G could consider different model options as they refine their strategy moving forward.



Appendix A | List of Co-Funders in our Sample

- Community Foundation of Sonoma County
- Hawaii Community Foundation
- Hope for New York
- Inasmuch Foundation
- Marin Community Foundation
- Moses Taylor Foundation
- Sunlight Giving
- Sand Hill Foundation
- The James Irvine Foundation*
- The Ford Foundation*

* *Core funders*