



## Listening & Feedback: A Funder Action Menu

Fund for Shared Insight believes that foundations and nonprofits are more impactful and effective when they regularly and deeply listen to the people and communities who are most affected by the systems and structures philanthropy is seeking to change. Our funder collaborative is committed to the kind of listening and learning that values lived expertise and advances equity. We believe that those who have been the most harmed by the systems and structures we are seeking to impact have the greatest insight into how to bring about lasting, meaningful change that can improve lives in ways people define for themselves.

We've created this menu as a resource to help foundations think systematically about how to promote listening and feedback across the many dimensions of their work. Examples are drawn from inside and outside our network of funders and draw heavily from a report we recommend you read: "[Bridging the Gap: A Review of Foundation Listening Practices](#)," by the consulting firm Ekouté. We also encourage further exploration of resources that advance listening, including our [three-step toolkit](#) designed for funder collaboratives.

As you peruse this menu, please consider how your own funding and operations practices and the values you demonstrate either support or create barriers to listening. It's also critical to consider whether you are willing and able to make changes in response to the feedback you gather, improving your own practices in service of equity.

If you are ready to move ahead, here are some ideas:

### FUNDER ACTION MENU



Talk about feedback in the application and reporting processes



Use listening and feedback to inform strategy development



Convene nonprofits and funders to listen and learn together



Use listening and feedback to inform measurement, learning, and evaluation



Make capacity-building grants to improve nonprofit feedback practice



Employ a variety of tactics to listen directly to people and communities



Use listening and feedback to inform grantmaking



Incorporate listening into other areas of foundation operations



## Talk about feedback in the application and reporting processes

We encourage funders to ask about organizations' feedback practices because it sends the message that philanthropy cares about feedback and that listening to people and communities is an expectation. We also recognize the power dynamics inherent in relationships between funders and nonprofits, so we encourage you to approach organizations' responses with understanding. Grantees, for example, may be taken off guard if they perceive a question about feedback as unrelated to the program or project you're funding. Or they may cite capacity constraints that hinder their feedback collection or ability to make changes in response. Make sure you are asking in the spirit of partnership and with serious intentions to use what you learn to change your own practices.

### On the grant application, ask grantees how they collect and use client feedback

A sample of questions:

- Can you explain how the population you serve is involved in the work of your organization, and/or how client feedback is collected and incorporated? (**The Morris & Gwendolyn Cafritz Foundation**)
- Please describe how voices of historically excluded groups and/or individuals with lived experience are sought out and reflected in program decision making. (**Conrad N. Hilton Foundation**)
- To what extent does your organization listen to and obtain feedback from those you serve? How is this feedback used to inform delivery of programming and services (including your advocacy agenda, if applicable)? To what extent do you let those who provided feedback know how their input was used? (**The James Irvine Foundation**)
- How do you solicit feedback from your participants? Do you have a system in place to make changes to your program(s) based on the feedback received? (**Moses Taylor Foundation**)
- How do you incorporate feedback from those impacted by this project? (i.e. How do you listen to the voices of those you impact? How do you engage with the people you seek to serve, help or impact?) (**The JPB Foundation**)
- How do you listen and learn from your program participants and obtain actionable information? Please provide an example of an improvement made to your program based on capturing the voice of your participants. (**United Way of Greater St. Louis**)
- How is your approach informed by evidence and the voices of those you're serving? How is it informed by evidence? (**Younger Family Fund**)

### **Include questions in your site visits about how the nonprofit listens to people and communities**

If your application includes questions about listening and feedback, site visits can offer an opportunity to ask follow-up questions and learn more. For example, you might ask grantees how they close the loop, or what specific changes they have made in response to client or community feedback. And if your application doesn't include a question about feedback, the site visit offers an opportunity to introduce the topic.

- During a site visit to a nonprofit that had applied for a grant to pay for security upgrades at its facility, the **Plough Foundation** suggested the nonprofit conduct informal surveys among staff, volunteers, and clients before and after the upgrades to inform plans for changes and then gauge how they were received.

### **Include in your grant reporting requirements questions about feedback and listening**

The same questions that can be incorporated into applications and site visits can also be used in final reports. We do not yet have examples of final report questions, but we are particularly interested in finding such examples, especially where funders have used what they learn to inform future grantmaking strategy (see below).



## **Convene nonprofits and funders to listen and learn together**

A collaborative effort ourselves, Shared Insight believes that building the culture and practice of feedback in the social sector is a learning journey best done along with our fellow funders, grantees, and the people at the heart of our work. As in any field, sharing information, best practices, benchmarks, and inspiration is a productive way to move forward together.

For grantmakers with smaller budgets and staff, collaboration and convening can be an accessible way to learn more about feedback and listening while also creating opportunities for grantees to learn from each other. Examples of different approaches include:

### **Collaborate with other funders to learn about listening and feedback**

- Ongoing: **NEPA Funders Collaborative**, a consortium of grantmakers in Northeastern Pennsylvania, co-funds a number of nonprofits participating in the Listen4Good feedback initiative. The consortium — spearheaded by the Moses Taylor Foundation — came together with the explicit goal of creating a learning community of funders and nonprofits in the region participating in efforts to collect and use client feedback.

- Ad hoc: Four pairs of grantmakers from around the country have partnered in recent years to co-fund nonprofits participating in Listen4Good. They are: **San Juan United Way** and **Merrion Foundation**; **Endowment for Health** and **New Hampshire Charitable Foundation**; **Mary Black Foundation** and **The Spartanburg County Foundation**; and **Rockwell Fund** and **The Simmons Foundation**.

### Convene funders and nonprofits that are implementing high-quality client feedback loops

- Every quarter, **NEPA Funders Collaborative** convenes area funders and nonprofits participating in Listen4Good to share their progress and learnings around their feedback and listening efforts.
- Boston-based **Barr Foundation** and **The Boston Foundation** hosted a one-day New England Listen4Good Gathering in partnership with Philanthropy Massachusetts to connect, learn, and build momentum for funders and nonprofits in the area implementing high-quality feedback loops.
- **Mary Black Foundation**, **Episcopal Health Foundation**, **The James Irvine Foundation**, **Edna McConnell Clark Foundation**, and **Virginia Piper Charitable Trust** are among other funders that have hosted one-time convenings of their foundation staff and funded nonprofits working on client feedback efforts.



### Make capacity-building grants to improve nonprofit feedback practice

One of Shared Insight's core goals is to provide widespread access to tools and resources that increase the capacity among organizations to systematically listen to and respond to their clients. Through our signature feedback initiative, Listen4Good, we have partnered with co-funders to make grants to organizations implementing high-quality feedback loops using our uniquely designed five-step process. We also invite funders to sponsor grantees in two new Listen4Good programs, Listen4Good Online+ and Listen4Good Premium, and encourage them to provide additional capacity-building funds, as needed. Here's another way to offer capacity-building support:

### Put aside a pool of funds that nonprofits can access as they make changes in response to client feedback

- When **NEPA Funders Collaborative** organized in 2019, it set the goal of raising \$75,000 from its members to support five nonprofits to participate in Listen4Good's co-funded grant program. When \$90,000 was collected, the group set aside the additional money for mini-grants to help pay for changes the nonprofits might implement in response to client feedback.



## Use listening and feedback to inform grantmaking

When funders think about feedback and listening, they typically focus on gaining insights from their grantees, often about their performance and relationship with the organizations. While this is a critical practice to help funders improve their work, it is only a part of the story. Shared Insight believes that funders can and should use the insights they gain through their grantees' listening efforts and shared learnings to make better informed, more effective, and more equitable grantmaking decisions.

- After one of its grantees collected feedback that included concerns about clients' interactions with staff supervisors, **REDF** created a new funding opportunity for the organization to improve its staff training. Then, seeing similar issues at other youth-serving nonprofits, the funder created a new grant program to pay for different approaches to behavioral-health interventions at six nonprofits.
- Based in part on learnings from its participation in Listen4Good, when it sponsored nine grantees building feedback loops with clients, **The Boston Foundation** itself made some changes, creating a staff position to focus on participatory grantmaking practices, including a new grant program designed to be informed by community voice.



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- **Community Foundation for Greater Buffalo** undergoes a strategic refresh every five years, conducting a listening tour in order to re-examine its community goals. In one such effort, the foundation worked with community-based partners to engage community leaders, nonprofits, and residents through interviews, focus groups, and surveys. One result: instead of continuing with plans to invest in transportation and childcare, the foundation pivoted to focusing on systems change within education and workforce training programs to address the root causes of the challenges residents from low-income households said they were facing.<sup>1</sup>

- The **William and Flora Hewlett Foundation** considers itself an experienced donor in the field of family planning, yet when its Gender Equity and Governance Program was refreshing its strategic plan, the foundation turned to design thinking, a way of problem solving by deciphering what people really want through watching and listening. Hewlett brokered a partnership between IDEO.org and Marie Stopes International to engage adolescent girls in Zambia in project design. The result was a new approach that better connected with teenagers around issues of reproductive health.



*Photo credit, IDEO.org*

- **The Rockefeller Foundation** collects feedback data through the Lean Data approach of 60 Decibels from clients served by grantees in two program areas. In one instance, in Africa, the foundation deployed a micro-survey (using Interactive Voice Response) to hear directly from farmers, instead of relying only on self-reported data from grantees. After the survey found that farmers were not actually receiving services, Rockefeller was able to quickly intervene, changing its partnership strategy to address the issue.<sup>2</sup>
- Rather than defining its grantmaking by issue areas or developing its own initiatives, the **Perrin Family Foundation** focuses on supporting youth organizing. This approach gives community groups and young people the power to define their own priorities, focus, and strategies, creating opportunity and space for youth-led social change.



## Use listening and feedback to inform measurement, learning, and evaluation

When funders think about feedback and listening, they typically focus on gaining insights from their grantees, often about their performance and relationship with the organizations. While this is a critical practice to help funders improve their work, it is only a part of the story. Shared Insight believes that funders can and should use the insights they gain from listening and feedback to improve — make more effective and equitable — their other measurement, learning, and evaluation efforts.

- **Omidyar Network** also worked with Lean Data to collect feedback — through phone interviews and online surveys — from 4,800 clients involved with 24 organizations in Omidyar's education portfolio around the world. Among other findings, the data showed that clients of ed-tech organizations were most concerned with the depth and variety of content and the user experience, whereas clients of early-education organizations wanted wider choices in content and were most focused on the quality of the content. Omidyar shared these insights with other players in the sector and used them to advise their investees and guide their own future investments.<sup>3</sup>

- After participating in Listen4Good, **REDF** incorporated some of the Listen4Good survey questions into a multi-year study conducted by an outside research group evaluating the effectiveness of REDF's job-preparation interventions. REDF also followed up by seeking additional feedback from employees at the social-enterprise businesses it supports.



## Employ a variety of tactics to listen directly to people and communities

Shared Insight encourages funders to promote and support their grantees' efforts to collect client feedback and regularly seek those results and learnings. We also see enormous value in funders themselves listening directly to people and communities, building respectful and inclusive relationships that can shift power and lead to more equitable outcomes.

### "Get proximate to people"

- Inspired by Bryan Stevenson, the lawyer, social-justice activist, and author who popularized the phrase "get proximate," staff members at the **Silicon Valley Venture Fund** (SV2) have participated in community-led walking tours and discussions, shared a meal and conversation with residents in a transitional facility, and participated in a virtual reality experience meant to dramatize the challenges that foster children face.
- Since 2019, the **Satterberg Foundation** (later joined by other partners) has convened an annual Seattle Equity Summit, which brings together more than 400 BIPOC community members, along with white allies and partners, to listen to each other, share social justice and political strategies, and network. The summit includes representatives from business, government, and nonprofits, along with community members. The organizers record actionable items and report progress back to the group.

### Conduct community listening sessions

- When **The James Irvine Foundation** changed its focus to supporting low-income workers in California, it partnered with community organizations to hold listening sessions, reaching 400 residents (in 10 languages) across the state. The purpose of these sessions, attended by a mix of foundation board members, leaders, and staff from different departments, even IT, was to better understand individuals' hopes, fears, challenges, and dreams. Foundation staff members described being indelibly changed by the events, saying they helped to ground Irvine's work.<sup>4</sup>
- As the **San Francisco Foundation** was incorporating racial and economic equity into its core principles and goals, it hosted seven VOICE sessions across five Bay Area counties. The VOICE sessions focused on the "daily struggles, challenges, inspirations, and wins" of residents and what role the foundation could play in the community.<sup>5</sup>

- The **Bill & Melinda Gates Foundation's** Pacific Northwest Initiative team used an in-depth listening tour to inform its funding strategy focused on Native American communities in Washington and Oregon. Consulting with community members, one program officer said, "I'm not Native, who am I to say, and how am I going to decide [what to invest in]?"<sup>6</sup>
- The **William and Flora Hewlett Foundation's** Performing Arts Program helped coordinate six listening circles to better understand the perspectives of artists, cultural workers, and creative entrepreneurs around the Bay Area, in California, who have been underserved by arts grantmaking. The foundation reported back to the participants that it learned about valued cultural and artistic practices, and would reflect on those and how they can be recognized and supported as it refreshed its arts-program strategy.



*Photo credit, Bill & Melinda Gates Foundation*

### Commission community research

- To follow up on themes heard in its community listening sessions with low-income workers in California, **The James Irvine Foundation** commissioned a survey of more than 3,300 residents to gain insights into the unique experiences of different demographic groups (e.g., by region, age, race/ethnicity). Learnings from the listening sessions and survey were useful, but Irvine realized that the survey's sample of Asian-Americans and Pacific Islanders had painted dozens of nationalities and ethnicities as a monolithic group. To be able to see the unique challenges that exist among different groups, Irvine followed up with another survey, this time including 2,600 Californians from nine distinct AAPI ethnic groups.
- Through its program, Listening to Mothers in California, the **California Health Care Foundation** gathered perspectives from roughly 2,500 people who responded to a survey focusing on the experiences, outcomes, and views of childbearing women. The foundation aimed to hear especially from under-represented groups, such as by offering the survey in both English and Spanish and by oversampling Black women.<sup>7</sup>
- The **William and Flora Hewlett Foundation** funds large-scale polls that, like community research, are intended to enhance the foundation's and the broader field's understanding of the people, communities, and environments where they operate. Hewlett sponsors Colorado College's Conservation in the West poll, an annual survey of voters across eight western states about their opinions on conservation issues. It also funds the Ghana Center for Democratic Development's work on the Afro-Barometer, a continent-wide survey of public attitudes on democracy and governance.

### Share power

Sharing power can take a variety of forms, including participatory grantmaking, which describes



a range of practices and models in which people and communities affected by an issue become part of the grantmaking decision process. There are many resources for funders on this topic, including from GrantCraft and the National Center for Family Philanthropy. Here are some ways funders have put ideas into action:

- The **David & Lucile Packard Foundation** has been practicing participatory grantmaking for decades in Pueblo, Colorado, where David Packard was born and grew up. After five years of making grants in the region, in 1977, the foundation established an advisory committee of community members to steer decisions. The committee still meets three times a year to review grant proposals, conduct site visits, and basically do the job of a program officer. The committee's work is now codified through a charter, members have term limits, and it is supported by a foundation staff member, an endowed position since 2018.
- The **Brooklyn Community Foundation** practices participatory grantmaking in a number of efforts, including through its youth fellowship program where young people run their own grant program, reviewing proposals, conducting site visits, and making recommendations. Through its Brooklyn Elders Fund, the foundation distributes money by incorporating the advice of a rotating group of older residents who work alongside program staff to inform grantmaking and advocacy efforts. And the foundation is shaping a grantmaking process to support immigrant rights that relies on the involvement of community activists.
- **YouthBank International** has more than 200 chapters in 32 countries. Each of its locally based programs is entirely led by youth peers who make grants using a collaborative process. They conduct community needs assessments and engage in a consensus-driven model facilitated by an adult leader – often from a donor foundation or local NGO.<sup>8</sup>
- The **Annie E. Casey Foundation** runs a fellowship program for young people who are paid to design programs and advise on grants for the foundation's youth-engagement work. Casey has also included young adults in internal RFP processes.
- As with other GreenLight Funds across the country, **GreenLight Fund Boston** relies on local GreenLight Selection Advisory Councils made up of for-profit and nonprofit leaders, philanthropists, social entrepreneurs, and academics, who act as expert partners and sounding boards to help decide which community-based organizations receive funding. In Boston, GreenLight's model also includes a separate council of family partners who engage in a parallel process to the Advisory Council, sharing their opinions on what kinds of services they would use and how nonprofit programs impact their communities. Ultimately, the family partners join the Advisory Council to vote on what organization to support.



Photo credit, Brooklyn Community Foundation



## Incorporate listening into other areas of foundation operations

While much of our work in the feedback field has been focused around grantmaking practices, we recognize the importance of infusing listening throughout foundations. Here are some ways funders are listening in other areas of their work, internally and externally:

### Meetings: Hold board meetings or other convenings in community settings

- The U.S. Partnership on Mobility from Poverty, an initiative of the **Bill & Melinda Gates Foundation**, held its capstone event at THEARC, a multi-tenant nonprofit community center located in and serving one of Washington, D.C.'s most impoverished neighborhoods.
- The **Durfee Foundation** held a board meeting at A Place Called Home, a nonprofit youth agency in Los Angeles run by an alum of the foundation's sabbatical program, which recognizes and rewards accomplished nonprofit leaders. The meeting included a tour of the organization, meeting staff and community members, and a singing exercise with a Durfee grantee, Urban Voices Project.

### Staffing: Hire interns, employees, and consultants who have relevant lived experience

- The **Ford Foundation** created a professional development program for graduates of the Bard Prison Initiative, a program Ford had long supported that gives incarcerated people an opportunity to earn a degree from Bard College while serving their sentences. Participants spend a paid year exploring career paths at the foundation and getting other supports, such as opportunities for networking and building technical skills.
- For a landscape scan of a potential new grantmaking area, the **Conrad N. Hilton Foundation**, hired a consultant who had lived experience in the foster care and juvenile justice systems. And in its initiative on homelessness, a consulting group contracted through a sub-grant includes a person who has experienced homelessness and is engaging a steering committee of stakeholders, in which half the participants have experienced homelessness.
- The **Conrad N. Hilton Foundation** has piloted an internship program for young people who have experience in the foster care system, and it is developing a fellowship program to provide leadership and professional development opportunities for people with lived expertise in other issues areas where the foundation works.
- The **Community Foundation for Greater Buffalo** says it is "very committed to ensuring we have people with lived experience at the decision-making table...If we are working on re-entry, we want people who have experienced re-entry at the table leading the effort." As new initiatives are developing, the funder says that natural leaders emerge from the community who are then invited to lead, monitor, and oversee the implementation of programming.<sup>9</sup>

## Governance: Bring people with relevant lived experience onto your board and/or advisory boards

- The **Blagrave Trust**, a UK-based foundation supporting young people experiencing disadvantage, now has a predominately youth-led executive board. Having more youth involvement has informed, among other things, a shift in the trust's policy analysis to new areas that are of particular interest to young people, such as climate change.<sup>10</sup>
- **The California Endowment** engages young people living in California to serve on its President's Youth Council, intended to center youth voices and help shape the foundation's investments and culture. During three-year terms, council members provide community perspective and also get leadership, professional-development, and networking opportunities.
- To include young people in its decision-making processes, the **Global Fund for Children** works with an active Youth Leadership Council composed of seven youth leaders between the ages of 18-29, representing different facets of the social sector around the world. The council's chair was once a participant in a grantee partner's programming, and now sits on both the foundation's board and grantmaking committee. Council members are considered "vital sources" when the foundation is designing strategies, programs, or selecting new community-based grantee partners.
- Through a community-based research process that tapped the wisdom of local movement leaders and grantee partners, the **Tzedek Social Justice Fund** recognized that it needed board members with direct experience doing the kind of work that Tzedek funds. Founder and donor Amy Mandel stepped down from the board, and Tzedek is now governed by an eight-member board of community leaders, seven of whom are people of color.

Please consider this [Funder Action Menu](#) a work in progress. We know there are many more examples of how funders are listening to and learning from people and communities most impacted by their decisions. We hope that we'll hear from you, so we can continue to build this resource and other sources of knowledge and inspiration that move us toward a more inclusive philanthropy rooted in the lived expertise of those at the heart of our work.

<sup>1</sup> Valerie Threlfall and Rebecca Klein. *Bridging the Gap: A Review of Foundation Listening Practices*. October 2019. Pg. 29

<sup>2</sup> Ibid. Pg. 31

<sup>3</sup> Ibid. Pg. 32

<sup>4</sup> Ibid. Pg. 19

<sup>5</sup> Ibid. Pg. 20

<sup>6</sup> Ibid. Pg. 19

<sup>7</sup> Ibid. Pg. 15

<sup>8</sup> Grantcraft. *Deciding Together*. [http://grantcraft.org/wp-content/uploads/sites/2/2018/12/DecidingTogether\\_Final\\_20181002.pdf](http://grantcraft.org/wp-content/uploads/sites/2/2018/12/DecidingTogether_Final_20181002.pdf). Pg. 37.

<sup>9</sup> Valerie Threlfall and Rebecca Klein. *Bridging the Gap: A Review of Foundation Listening Practices*. October 2019. Pg. 34

<sup>10</sup> Ibid. pg. 33.