Fund for Shared Insight

Learning from Feedback Research Grantees: Beyond Research Findings

The Value-Add of Perceptual Feedback

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1100 Olive Way, Suite 1350 | Seattle, WA

206-728-0474 | ors@orsimpact.com

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Introduction

Collecting client feedback has long been thought of as the "smart thing to do" but it wasn't until Fund for Shared Insight (Shared Insight) awarded grants to six nonprofit organizations[1] in 2019 that evidence to support this claim was explored in a systematic way. This investment in a portfolio of feedback research projects is part of Shared Insight's "build a feedback field" strategy in which it believes that integrating a high-quality feedback practice into the nonprofit sector will lead to better outcomes for clients. This report seeks to unpack this connection further.

After several years of navigating hurdles and setbacks related to the pandemic including staff turnover, and challenges related to virtual programs and in-person data collection, the nonprofits and their research partners completed their research in 2022. Aligned with Shared Insight's hypotheses about the connection between feedback and outcomes[2], their research results showed a positive association between collecting perceptual client feedback and achieving positive client outcomes.

In early 2023, we interviewed the six nonprofit organizations and their research partners[3] to more deeply understand the connection between feedback and outcomes. In those conversations, we inquired about what the *practice* of collecting perceptual data meant to organizations *beyond* their research findings, their future research plans, if they had any, and to reflect on how the feedback field has changed in recent years. We also asked them to reflect on Shared Insight's portfolio approach in convening the nonprofits to enable peer learning. Early insights around the connection between feedback and client outcomes and how nonprofits have perceived the feedback field changing in recent years can be found here. Additionally, in this memo, we share findings from the interviews in efforts to continue learning about the connection between feedback and client outcomes and contributing to building a feedback field.

[1] Boys & Girls Club of the Peninsula (BGCP), Center for Employment Opportunities (CEO), Nurse-Family Partnership (NFP), Pace Center for Girls, REDF, and YouthTruth.

[2] (1) Obtaining feedback in real time from participants helps nonprofits improve their programs, (2) positive feedback on programs correlates with better outcomes for participants and (3) the practice of collecting feedback can lead to positive outcomes through higher program engagement.

[3] We spoke to nonprofit staff and their research partners at the same time making it difficult to decipher speakers from interview transcripts. When it was possible to identify the speaker—either the nonprofit staff or research partner—we noted it.

Summary of High-Level Findings

- All organizations found value in reflecting on perceptual feedback data. It enabled them to improve their programs in real-time by more deeply understanding the needs of their clients, see early signals of program success, and add greater nuance to program strategy design.
- Most organizations connected feedback to equity work both at the organizational and field-level.
- Most organizations expressed desire and commitment to continue collecting perceptual feedback in some capacity beyond their research project and to continue unpacking their research findings.
- All organizations shared positive and constructive reflections about Shared Insight's cohort experience approach.

Value of Perceptual Feedback[4] Data

Overall, all organizations found both *reflecting* on their research findings as well as the *practice* of gathering perceptual feedback to be valuable. Most organizations mentioned using their research findings to improve their programs and services to better meet the needs of their clients and as an input into program strategy work. Some research partners also talked about perceptual feedback spurring new ways of thinking in terms of research and evaluation. All organizations expressed desire to continue gathering and reflecting on perceptual data moving forward.

Guided Program Improvement

The primary way organizations used their perceptual feedback data was by helping them understand the degree to which their programs were meeting the needs of their clients and guiding program improvements. Most organizational staff (5) mentioned that their research findings provided them with real-time data about how their clients were experiencing their programs, which gave them the insights needed to make improvements. For one nonprofit, for example, clients expressed their level of satisfaction with participating in a virtual program, which prompted the organization to continue offering that program online. For another nonprofit,

[4] As defined in *Perceptual Feedback: What's it all about?*, perceptual feedback refers to the "perspectives, feelings, and opinions an individual has about their experiences with an organization, product, or service that are used to inform and improve the practice and decision-making of that organization."

clients revealed their fears and motivations beyond the program, helping the organization know where to offer additional support.

> *"We can have the best of intentions, design programs that are based on really good theory, but we need to know how they're working for [the people using the program]."*

Several staff also talked about how perceptual data helped affirm what they already knew about their programs more anecdotally and gave them empirical evidence to communicate the impact of their programs within their organizations and with community partners. The usefulness of perceptual data in their own organizations also helped them to further advocate for the importance of collecting client feedback within their networks. More details about the different insights that organizations gained from their research can be found here.

Provided "Early Signals" of Program Success and Added Nuance to Program Strategy Design

Two research partners talked about using perceptual data to pressure test the organization's programmatic theories of change to determine whether client perception was aligned with the experience and benefit that staff hypothesized for their programs. One research partner talked about how client feedback allowed staff to get a sense of whether a program was on the road to success more accurately than relying on theorized progress markers and staff's perception of a program's performance alone. A research partner from another nonprofit added that they thought of participant perceptual feedback data as "early signals" towards positive program outcomes.

Two staff members from different organizations also commented on how helpful it was to have perceptual feedback data during program strategy design. These data were especially helpful when it came to developing new program goals and objectives because it tempered program ambitions and helped right-size expectations around program experience and ultimately, impact. Another organization also mentioned that perceptual feedback data helped them to interrogate whether the outcomes they were focused on achieving were the ones that mattered most to clients. If not, this insight enabled organizations to identify different outcomes that were more aligned with their clients' experience.

Challenged Assumptions

"[the lives of many participants] are very complex…there might be a variety of reasons why someone isn't responding to your feedback in a way that you might think"

When it came to making sense of program outcomes, two staff mentioned that perceptual feedback allowed them to better understand the "systems" and cultural contexts in which their clients lived. For example, one research partner talked about trying to make sense of why a survey they were launching had low participation. They shared that it's often common to deem low survey participation as an "engagement" problem without looking at other underlying factors that might explain why survey participation is low. In this same example, researchers discovered through collecting perceptual feedback that the timing of when the survey was sent out was too late in the day and it was unlikely that people would click on the link at a later date. At the same time, researchers learned that clients genuinely appreciated the invitation to take the survey because it made them feel valued and included, which started a conversation around how to continue efforts to make clients feel a part of the community.

Connected Feedback to Equity Work

Most (4) organizations connected perceptual feedback data to equity work.[5] Two staff members and one researcher, all from different organizations, said that collecting feedback from participants is an equity-centered practice. One of those staff members gave an example of learning about the discrimination faced by their clients through feedback, which in turn helped that organization address those challenges more directly. Another staff member talked about their feedback work fitting nicely into their organization because it was tied to their organizational value around listening. The researcher mentioned that you can't achieve equity without listening. Additionally, a researcher from a different organization talked about how broader equity conversations are driving the expectation around how feedback is discussed in the feedback field.

[5] This finding includes the two previously identified nonprofits that connected feedback to equity mentioned in the 2020-2023 lookback report, which was based on a partial review of interview data.

Future Work

All organizations expressed interest and desire to continue collecting perceptual feedback beyond their research project, illustrating their strengthening commitment to a feedback practice. Some staff members talked about perceptual feedback becoming a standard practice in their organization while staff from other organizations with more mature feedback systems mentioned that their research project made them bigger champions of collecting client feedback. Staff also shared that their research findings brought up many more questions for them that they are eager to unpack.

Strengthened Commitment to a Feedback Practice

Staff from most organizations (5) shared examples of different ways that they are continuing their feedback and listening practice beyond this research project.

- Two staff members from different organizations talked about looking for new, **ongoing opportunities to ask their clients for feedback**. They also talked about encouraging their partner organizations to collect perceptual feedback data for themselves.
- Staff from three different organizations mentioned **new audiences** from which they hoped to gather feedback in the future.
- Two staff members from different organizations also mentioned **collecting perceptual feedback as part of future program evaluation**.
- Two staff members from different organizations talked about client feedback **becoming an expected organizational norm**. One of those staff members shared that prior to this research project, they had not considered collecting feedback from clients as a standard norm in their organization and that this experience gave them a “framework” for collecting client feedback in a more systematic way.
- One staff member talked about **recruiting participants** to help the organization understand and improve program access and enrollment.

“I foresee every evaluation that we do, having some component of [community] feedback. If we want to live out our values and if we want to follow best practices and program evaluation, that's something that we absolutely need to do.”

Most (4) organizations also indicated that they have made or plan to make organizational changes to *allow for* more perceptual feedback to be collected. One staff member shared how their research project experience "*invigorated [them] to make sure that [they are] collecting data over a long period of time and housing that in [their] database*." Another staff member also mentioned ensuring that project contracts allow for the collection of participant feedback as a data source for program efficacy.

A couple of organizations that had more mature feedback collection systems in place also said that collecting perceptual feedback through this project helped solidify the importance of feedback in their work and enabled them to be better champions of feedback and provide evidence of why collecting feedback is the "smart thing to do."

Surfaced New Questions to Explore

When asked whether they were curious about anything else related to their research findings, staff at almost all organizations (5) expressed desire and excitement to further analyze and understand the perceptual feedback data they had collected. Staff acknowledged that there is more sensemaking and sharing insights that need to happen with other organizations. Many (4) of them posed additional questions about their programs that perceptual feedback data could help them better understand. For example, one staff member talked about exploring how generalizable their insights are to other areas of their work and among other populations.

Additionally, one staff member talked about wanting to produce a "how-to" resource (using lessons learned from the feedback process) to help other partner organizations interested in collecting perceptual feedback data understand how to collect it via survey.

Cohort Experience

In addition to funding to conduct the research processes, Shared Insight decided to augment funding with some convening and staff support. That included a kick-off convening to learn more about the different projects and approaches, webinars to share and learn about interim findings and challenges within different projects, a final convening to share results across the funded projects, and dedicated staff to provide oversight and support to the projects overall. The intent of bringing grantees together was to support greater learning across the projects during the design and implementation phases, and to help all partners learn and build upon the findings across the projects.

Overall, staff members from all six nonprofit organizations had a positive experience as part of the research cohort. They appreciated making connections with each other and expressed gratitude to funders for supporting this kind of work. Half of the nonprofit's research partners also called out specific aspects of the experience that they enjoyed. Staff members also offered constructive feedback on how to improve this cohort experience if it was ever recreated.

Making Connections

Staff from all six nonprofits said that the most beneficial part of the research cohort was making connections with other organizations both in person and online. Several (3) staff specifically highlighted the in-person November convening as a productive opportunity to forge new relationships. One staff member said that it was "*very helpful to have a community of researchers and nonprofit leaders together thinking through challenges and opportunities*" and a staff member from a different nonprofit talked about connecting with a nonprofit in a different state to collaborate on a research paper. Two research partners from different nonprofits also mentioned liking the cadence of virtual meetings.

Constructive Feedback on the Cohort Experience

When asked for suggestions to improve the cohort experience, staff from all organizations provided constructive suggestions. Staff members from half (3) of the organizations emphasized that it would have been helpful to have more opportunities for collective learning and meaning making around research findings. One staff member mentioned how virtual meetings often felt like a "show and tell" versus engaging in thoughtful conversation around emerging insights, challenges, and research findings. To improve the cohort experience, two other staff members from different organizations offered the suggestion of having learning meetings centered around different topics to give conversations more focus and structure. Another staff member also shared that meetings sometimes felt not as useful for them depending on where they were in the research project themselves and acknowledged that as a challenge of having a cohort where different organizations are in different phases of the project. They shared, *"there was a little too much too soon because we were stuck… [waiting to] access to data. I think initially there was a lot of 'what are you learning? What are you learning?' and we're trying to get started. I think that [participating] felt more beneficial later on in the experience."* This staff member's research partner also commented that they didn't realize the time commitment that this project would require of them. Two staff members from different organizations also suggested that Fund for Shared insight could have played a bigger role in connecting organizations with similar insights and challenges with one another to troubleshoot and make meaning of insights together.

Evaluator Reflections

The feedback field now has evidence that collecting high-quality feedback correlates to better client outcomes and there are opportunities to further explore this connection.

For years now, client feedback has been seen to be an important step to understanding program satisfaction and helping unveil the realities of how programs are experienced by clients. Findings from this research cohort showed that client feedback is important for making real-time program improvements that make programs more effective because they are better tailored to respond to the needs of clients. While collecting feedback is not a new concept, as several of the nonprofit researcher partners mentioned, it *is* a practice that has required less justification of its use over time. As we heard from several of the nonprofit's research partners, collecting perceptual feedback data has become more of an expected standard rather than just a recommendation for good practice. So beyond being the "right" or "nice" thing to do, research grantee cohort findings support the fact that collecting perceptual feedback is also the "smart" thing to do as it can lead to better program outcomes.

Beyond learning about how insights from perceptual data can lead to better outcomes, there is also an opportunity to better understand why and how the *act* of collecting high-quality feedback can also lead to better outcomes. Shared Insight theorizes that the practice of collecting client feedback leads to positive outcomes through increased client engagement. It's also possible that when nonprofits collect perceptual feedback from client, nonprofits are signaling that they care about the client perspective, making clients feel heard and valued and more likely to report favorable program impact. Future inquiry can focus on learning about this connection in efforts to continue building the body of research that exists about how nonprofits can benefit from integrating high-quality feedback practices into their organizations.

The experiences among research project grantees continue to strengthen the connection between feedback and equity.

While feedback and equity work are not new activities among nonprofits, the connection between the two has become clearer over the years and the quality with which they are being addressed has increased. Findings from this research cohort support the idea that feedback can contribute to an organization's equity work as a catalyst, mirror or compass, treating clients as experts in their own lives and enabling program improvements to be guided by them. For organizations who may be newer to equity work, feedback work can be a promising first step into that work. Feedback work can also help make programs more participatory and contribute to shifting power from nonprofits to their constituents.

Most nonprofits expressed value in continuing to collect client feedback beyond their research project grant.

Most research grantees expressed desire in continuing to collect feedback beyond their research project, which is a promising signal that nonprofits see sustained value in collecting client feedback. This is in line with past research findings from nonprofits, which showed that once organizations engage in feedback work, most see its value and sustain the practice overtime. In this project, two nonprofit staff mentioned plans to use client feedback in future program evaluation, showing that collecting client feedback is a helpful way to assess program outcomes and goals. The same two staff also mentioned client feedback as important for program strategy and planning because it helps facilitate outcome and goal generation that is aligned with real-time client experience rather than theories and assumptions.

Connecting feedback and listening to an organization's mission is important for helping ensure the adoption of a feedback practice among nonprofit organizations.

One thing that made it easier for nonprofits to integrate a feedback practice into their organization is if they could connect feedback and listening to their organizational mission. It's likely that being able to connect feedback and listening to their organizational missions creates a higher-level of buy in from staff and leadership because it *reinforces* organizational goals and values. It is also possible that connecting feedback and listening to an organization's mission creates a stronger expectation for staff to utilize this practice. In future efforts to galvanize adoption of feedback practices in the nonprofit sector, it's important to consider the extent to which feedback and listening can be connected to an organization's broader goals.

To establish a robust knowledge base around feedback, research insights need to be more widely socialized and digested.

Moving forward, one thing to consider is if the research findings have been shared enough in the feedback field to continue building the knowledge base around its benefits in the nonprofit sector. Shared Insight should consider additional dissemination practices through conferences, reports, and other informal outlets such as social media. It's one thing to have research available and another to make the research widely known as part of building a field.

Moving forward, Shared Insight should consider who will take their place as convener of funders and nonprofits in the feedback field.

As Shared Insight thinks about the future of the feedback field and who can continue to play the role of convener and facilitator, there are a couple of considerations to keep in mind. For research grantees, having a dedicated space for peer learning, sensemaking, and troubleshooting was beneficial. And while both in-person and virtual spaces were appreciated, in-person time was deemed the most helpful. Research grantees appreciated being intentionally connected to one another and given the opportunity to connect with others outside their organization, signaling the importance for someone in the field to continue playing this role moving forward. As Shared Insight thinks about the future and sustainability of the feedback field, it should consider identifying champions to convene the field beyond Shared Insight's sunsetting in 2026.

Conclusion

Insights from the feedback research cohort show promise in demonstrating how feedback work is becoming more of an expected standard among nonprofit organizations. Through our inquiry, we learned about the different ways that nonprofits found collecting perceptual feedback data valuable; organizations talked about improving their programs in real time with client feedback and using client feedback as an input into their program design work. They also talked about the importance of feedback work for centering equity in their organizations. As the feedback field continues to grow, we're excited to be contributing additional evidence to support the connection between feedback and client outcomes.

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