

# Stanford SOCIAL INNOVATION<sup>Review</sup>

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*Case Study*  
**Funding Feedback**  
By Katie Smith Milway

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## CASE STUDY

AN INSIDE LOOK AT ONE ORGANIZATION

# Funding Feedback

**Fund for Shared Insight** is pooling the cash and convictions of 13 philanthropies to build the field of end-user feedback. The collaborative aims to help nonprofits and funders learn from and empower those they seek to help. Can its leaders become role models for the positive change they seek to create?

BY KATIE SMITH MILWAY

**F**ay Twersky and Lindsay Louie of the William and Flora Hewlett Foundation were stumped. Less than a year into forging a coalition of funders that was briskly moving grants out the door, they realized that they might have a flaw in their approach to fostering change. The collaborative they helped to create, Fund for Shared Insight, aimed to help funders and nonprofits become more effective by listening intently to the people they strove to help—their end users. Although gathering user feedback is common in the corporate world, where consumer preference informs strategy and makes or breaks sales, in the charitable sector, consumers too rarely get asked if the hours are convenient or the services are advancing their life goals.

The potential for user feedback to improve funder and nonprofit decisions and offerings, as it does commercial entities', seemed obvious. But it became clear to Twersky and Louie, after a January 2015 visit to nonprofits piloting ways to listen, that it was going to be hard to capture that potential. "There was no existing platform that could scale," says Twersky, "and the approaches that nonprofits were using seemed artisanal and very complex."

Twersky, Louie, and Fund for Shared Insight's story of finding simplicity on the other side of this complexity—of collaborating with other funders not to scale a proven approach, but to design a solution with nonprofits and their end users that could be adopted far and wide—is fairly unique in the world of philanthropy.

For one, the collaborative has knit itself together with uncommon principles. Whereas many collaboratives have a lead funder whose staff manages meetings, Shared Insight has an

independent structure with its own dedicated staff. Its funders share leadership with equal voice, despite unequal stakes. And they buy into cultural norms such as talking out differences and engaging deeply and in person with grantees. Whereas collaboratives that invest in third-party evaluation (not all do) typically receive retrospective assessment, Shared Insight gets outside perspective in real time, embedding an evaluator at each funder meeting who holds up the funders' theory of change and flags both adherence and drift.

For another, the sheer number of partners Shared Insight has recruited to develop approaches to feedback is striking: The coalition began in 2014 with six funders pooling \$6 million a year with a goal of making philanthropy more effective. Four years later, Shared Insight has granted \$21.1 million and counts 78 funders collaborating with 184





↓ Fund for Shared Insight cochair Fay Twersky (right) moderates “The Future of Feedback” panel at the May 2018 Shared Insight Gathering of grantees and co-funders in Houston, Texas.

nonprofits to develop and test a signature feedback tool that by 2020 any nonprofit with a SurveyMonkey account should be able to use.

Finally, Shared Insight’s theory of change itself is audacious: It seeks to build the core capacity we all have to listen, empathize, and respond into a norm that meaningfully connects nonprofits, foundations, and the people and communities they seek to help. This goal is challenging funders’ capacity to listen to diverse voices of surrounding communities and make changes themselves that advance equity and inclusion both inside their organizations and across their grantmaking. And it’s challenging them to move beyond building a tool for listening to building the field of feedback.

### FORMING THE FUND

When Twersky became director of the Effective Philanthropy Group at Hewlett in 2013, she brought decades of experience in social impact strategy development and measurement, including four years as a director at the Bill & Melinda Gates Foundation.

Twersky, her newly hired program officer, Louie, and Hewlett’s new president, Larry Kramer, reviewed Hewlett’s grantmaking to strengthen its philanthropy with fresh eyes. They identified an initiative ripe for exit that was receiving grants of about \$2 million annually—funds that would need a new strategy for deployment. They also found that funding for sector supports such as expert convenings, field associations, and measurement tools had lagged growth. “I had a strong sense that it would be good for more funders

to be supporting infrastructure ... and if we wanted to change the sector, we needed to do it together,” Twersky says.

At the time, annual US charitable giving surpassed \$300 billion to more than 1.4 million nonprofits. “While \$2 million is a lot, it’s not much per year relative to the sector we’re trying to influence,” Twersky says. But, she reasoned, one funder’s commitment could draw other philanthropies to combine resources.

That insight led Twersky and Louie to call peers at funders around the country and convene exploratory conversations. One such peer, Darren Walker, then a vice president at the Ford Foundation (and today its president), quickly became a close ally. Based on these conversations, Twersky and Louie commissioned third-party research on four themes that had surfaced as potential common cause: beneficiary feedback, foundation openness, learning from big data, and building a common measurement system for those seeking philanthropic dollars.

Ultimately, representatives of six interested funders gathered at the Ford Foundation in February 2014 and zeroed in on the first two themes: strengthening beneficiary feedback and encouraging foundations to share their approaches, successes, and failures more openly so that others could learn from them. Most important, they committed dollars—from \$250,000 to \$2 million annually for each of three years—to a collective fund. Core funders included Hewlett and the David and Lucile Packard Foundation from the West Coast; and Ford, the Rita Allen Foundation, The JPB Foundation, and fin-

tech company Liquidnet from the East Coast. Within months, a Midwest funder, the W. K. Kellogg Foundation (WKKF), completed the founding coalition. Some who declined joining the core contributed lesser amounts for specific projects or general operating expenses, dubbed “sidecar funding.”

With funding assembled, Twersky and Louie moved to share leadership. Darren Walker’s vice president at Ford, Hilary Pennington, stepped in to cochair the fund with Twersky. And they sold core funders on an uncommon operations strategy: forming a separate entity with its own management team, fiscally sponsored by Rockefeller Philanthropy Advisors (RPA).

Today, core funders attribute Shared Insight’s ability to cycle rapidly from decision making to implementation to its independent structure and dedicated staff. Whereas many collaboratives function as coalitions of foundation representatives, the RPA perch allowed Twersky and Pennington to recruit an able and energetic managing director, longtime collaborator Melinda Tuan. A former grantmaker and foundation consultant, Tuan in turn recruited

PHOTOGRAPH BY EMMA MARIE CHIANG, COURTESY OF THE FUND FOR SHARED INSIGHT



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a tight constellation of expert contractors to manage grantmaking and grantee support, plan core funder meetings, and act on decisions.

Tuan, with Louie's help, planned a July 2014 launch meeting to address three big goals: naming the fund, agreeing on its overarching objective, and determining its founding initiatives. At that session, Brian Walsh, who leads Liquidnet's social impact arm, Liquidnet for Good, pointed to the commercial world's understanding of the value of customer insight. The idea caught on, and with additional discussion, the name "Fund for Shared Insight" emerged. The funders also developed a goal statement of creating a "greater culture of openness in foundations characterized by more sharing and listening," with constituent feedback being one expression of that openness. Finally, they agreed on an agenda for making grants, and an intent to spend 80 percent of grant budget on feedback proposals and 20 percent on foundation openness.

Within two months, Tuan and Louie designed and launched a Shared Insight website, as well as designed and posted requests for proposals (RFP). With little promotion, 187 proposals swept in for consideration at the next meeting, in November 2014. This tide ultimately informed a narrowing of focus: The proposals for grants in feedback practice were particularly strong. "Getting 128 feedback practice proposals and being able to fund just [a few]," Louie says, "was one of my least happy days as a funder."

Tuan developed a common rubric to enable all funders to assess and compare assessments on those first proposals. "We worked very consciously on our norms and codes of behavior," Pennington says. "Sometimes funder collaboratives are almost like a parallel play—you don't even put money in a common pool; you just align on what you're trying to accomplish." Instead, Twersky, Pennington, and their coalition wanted to work and learn together. They debated the language of the first RFP, and all pitched in to review grant requests. In the end, they made a total of 14 grants: seven large, multiyear grants of \$300,000 to \$700,000 to the impressive pool of feedback-practice proposals; two to feedback research; and five to an admittedly weaker pool of proposals to improve foundation sharing and listening.

Those early experiences of working together created the kind of trust that allowed the collaborative to navigate difficult decisions. Indeed, as founding cochair Twersky and Pennington strove to foster a culture of openness and equity, they facilitated extended discussions of tricky issues until most votes became formalities. But if opinions remained split, no matter what one's stake in the fund, every funder got one vote and majority ruled.

For example, one contested proposal in the feedback-practice category came from the Center for Effective Philanthropy (CEP). It sought a major grant to continue CEP's national student survey program, YouthTruth, a pioneer in gathering end-user feedback. The request generated heated debate about "survival" funding. Cochair Twersky and Pennington, who had been involved years earlier in founding YouthTruth and sat on CEP's board, decided to recuse themselves from the vote but stay in the room for a time to

answer questions about YouthTruth's history. But then they realized that their very presence was wielding influence at odds with their norm of shared leadership. "It was a tricky moment," said Twersky, "but for the group to fairly make a decision, we needed to step out, knowing the vote could go either way. As cocreators and cochairs of the fund, it was an important signal that we trusted the group to make the best decision and that we would stand behind it."

The funders remaining in the room approved a smaller-than-requested grant by a 3-2 vote. Ultimately, the one-funder/one-vote norm held. This both strengthened core funders' belief in the process and paved the way for future high-risk/high-return investments. Phil Buchanan, president of CEP, reports that the bet gave YouthTruth breathing room to grow fee-based revenue to more than 70 percent of budget, a sustainable model.

At the same meeting, Shared Insight introduced another element of governance consistent with its goals: formal and continuous self-scrutiny to enable quick detection of what was and wasn't working. It hired ORS Impact evaluator Sarah Stachowiak, who began attending staff and core funder meetings. There, she reports on how Shared Insight is performing vis-à-vis stated goals. "[Being embedded] helps us to be an effective partner because we are hearing how Shared Insight members' thinking is evolving," Stachowiak says.

## LISTEN FOR GOOD

Big foundations, like many represented at Shared Insight, can spend millions of dollars to achieve clarity on the change they want to foster and a strategy to achieve it. But it can take years to figure out whether their theory of change holds. With embedded evaluation and dedicated staff seizing on each indicator, Shared Insight detected a problem and revised its approach to grantmaking within the first year.

Important clues came from market response. For one, more organizations wanted funding for feedback practice than anything else. For another, the quality of feedback grant proposals was higher on average than for foundation openness. But it soon became clear that even the feedback grants were not panning out as hoped.

Some feedback-practice grantees pursued big, expansive concepts to develop resources for any nonprofit to use, but struggled to scale. For example, Feedback Commons, a tool for nonprofits and their funders to collect and share feedback data, was designed by David Bonbright and Keystone Accountability, proponents of constituent feedback since the early 2000s. While Bonbright's ideas, which blended participatory evaluation from the nonprofit world with corporate tools for customer feedback, influenced many, Feedback Commons won few users. Meanwhile, Feedback Labs, a brainchild of Dennis Whittle, was developing a global learning network on feedback method and practice with more than 400 organizations, but it faced challenges in expanding its funding base.

Other feedback-practice grantees—those providing direct service—faced a different problem. All were leaders in their fields. They included Habitat for Humanity in affordable housing and



Center for Employment Opportunities (CEO) in criminal justice. These grantees were listening to constituents and learning how to improve services. But their path to change was multiyear and limited to their organizations. Although Shared Insight anticipated that changes at marquee nonprofits could create a domino effect, it appeared that making big grants to single organizations, however influential, still led to counting by ones.

That insight—that they needed a means to reach multiple organizations at once—came during that seminal January 2015 field trip by Twersky, Louie, Tuan, and founding funders Walsh and Elizabeth Christopherson of the Rita Allen Foundation to Washington, D.C., nonprofits. Twersky was rereading *The Ultimate Question* by customer-loyalty expert Fred Reichheld of Bain & Company, which introduced a one-question survey: “On a zero-to-ten scale, how likely is it that you would recommend us (or this product/service/brand) to a friend or colleague?” The resulting metric, called a “net promoter score,” became part of the Net Promoter System (NPS) that many commercial organizations use to improve customer retention and revenue growth.

The idea of NPS got them all thinking. They ultimately reset their sights on a version of the approach, but for nonprofits, to be based on an existing survey platform that would allow any nonprofit to subscribe.

It also revived a suggestion of Twersky’s to scale funder involvement. Early on, she thought that Shared Insight might offer co-funding opportunities on every grant. But the idea of integrating another wave of funders in year one made some Shared Insight cofounders nervous. Nonetheless, an NPS adaptation, which Shared Insight branded Listen for Good (L4G), opened a linear and logical path to revisit co-funding, with a structure that the founding core could embrace. Shared Insight staff imagined an RFP that would enable any funder to nominate grantees but ask the funder to chip in a portion of the L4G overall cost in the bargain. Moreover, L4G would come with a requirement that would prove important to future deliberations about the connection between feedback and social impact: Grants would target listening to “voices least heard,” such as youth, people of color, and vulnerable populations.

Not all solicited for input were enthusiastic. CEP’s Buchanan, an experienced survey developer, initially thought a social sector NPS made no sense given power dynamics between nonprofits and their clients. “Of course you’ll recommend anyone who can provide [resources],” he says. Others asked how one could benchmark a nonprofit-service experience, when the users often lacked choice and weren’t the payers.

Shared Insight’s staff and funders determined to implement their revised strategy, mindful of warnings. They stopped making large grants to single organizations and reallocated dollars to design an online feedback tool that could scale. They planned to learn from the early adopters, aiming at a viable, open solution by 2020.

With that in mind, Twersky, Louie, and feedback consultant Valerie Threlfall attended an April 2015 NPS Forum led by Reichheld and Bain’s Social Impact practice. Shared Insight representatives

also interviewed existing survey platforms such as Satmetrix (which codeveloped NPS), Salesforce.com, and SurveyMonkey. They ultimately favored the last for its ease of use and large nonprofit client base. By mid-2015, Tuan contracted Threlfall, former executive director of YouthTruth, to develop a tool and a technical assistance (TA) program to help L4G grantees.

L4G may have been born on that D.C. field trip, but it came out a toddler, having grown through Shared Insight’s grantmaking to marquee nonprofits. Take, for example, the Center for Employment Opportunities (CEO), which helps men and women returning from prison to find jobs and transition to stable, productive life. CEO piloted text surveys to clients and garnered a solid 50 percent participation rate, consistent across subsequent surveys. CEO also employed two feedback channels that allowed for in-person listening and response: focus groups and caseworker check-ins. In addition, CEO used part of its total \$600,000 in Shared Insight grants over three years to support a customer advocate, Nate Mandel, who grew CEO’s feedback practice and ensured that participants who gave suggestions heard the results. The role of customer advocate, and technical assistance to implement this role, is an important part of the L4G vision, with its emphasis on “closing the feedback loop” by relaying to clients how their input led to change, to reinforce the power of self-advocacy.

Shannon Revels, a 37-year-old survey participant, saw the effect of his own feedback. He suggested that CEO provide information in their waiting rooms on renewing drivers’ licenses. “It’s just something [helpful] for guys in my situation who are trying to get their life back together,” said Revels in an interview. California Department of Motor Vehicles literature, complete with practice tests, soon appeared. The experience gave Revels an idea for his new job as a resident service counselor for Community Housing Partnership in San Francisco: “I was supposed to run [enrichment] sessions three times a week ... and I saw attendance was very low. So I decided to ask residents what sort of courses or events they wanted me to offer.” Suggestions led to sessions on baseball analytics, game nights, and pop-up barbershops and hair salons, with up to 30 percent of his building’s 50 residents turning out, according to Revels. Next, Revels asked residents to critique his performance, via a 2018 residents survey. According to Revels, his building returned 92 percent satisfaction.

Empowering clients like Revels is the biggest benefit of feedback loops, says CEO’s chief impact officer, Brad Dudding: “One thing about starting to collect feedback and about raising the voices of constituents in your organization: You start to think about power relationships; you start to think about ways to increase participants’ influence; about the relationship between employees and constituents. You ask, ‘How can we create a model that is inclusive of the needs of participants and gives them a greater role in making decisions? Why can’t we have alumni on our board at CEO?’”

Marrying the basics of NPS with the experiences of marquee grantees like CEO led to L4G’s five-step process and five-question

survey, which gets at intangible aspects of any service experience: Were you treated with respect? Empowered to achieve personal goals? (See “The Tool: Listen for Good” below.)

By July 2015, Louie, Tuan, and Threlfall created L4G’s landing page on Shared Insight’s website and posted an RFP with Shared Insight’s offer to fund two-thirds of the \$60,000 cost to each nonprofit implementing L4G over the course of two years. With modest public promotion, the RFP in two months drew 53 nonprofit proposals nominated by 25 cofunders, in fields ranging from workforce development to health care. Funding eventually went to 46 of them. At the same time, legacy grantees, such as CEO, chose to add the anonymous L4G survey to their feedback mechanisms. CEO offered it via tablets in its waiting rooms. “Anonymous ratings were about 20 percent lower,” says Dudding, “which helped us understand the courtesy bias in open ratings.”

For the 2017 and 2018 rounds of L4G grants, Tuan and Louie offered info sessions at nonprofit and funder convenings across

the country, leading to another 112 grants. With embedded evaluator ORS Impact tracking progress and surfacing lessons along the way about what was and wasn’t working well with L4G, and with feedback from Threlfall’s TA team, Shared Insight rapidly prototyped the tool. Threlfall and Louie figured out from round one that implementation costs fell in year two: They could reduce funding per grant by a quarter, to \$45,000; lower the match for cofunders; and stretch L4G’s budget over even more grantees.

#### TIME TO EVALUATE

By 2017, nearing the end of the core funders’ original three-year commitments, Shared Insight was ready to evaluate the effectiveness of grantmaking and specifically the value of L4G.

A three-year review of Shared Insight’s effectiveness by ORS Impact affirmed the fund’s agility—its willingness to bet boldly, learn, and course-correct—and found that it had demonstrated value

## The Tool: Listen for Good (L4G)

L4G is a simple system, powered by SurveyMonkey, that enables nonprofits to gather feedback from people whom they and their funders seek to help; use it to inform service delivery and strategy; and let those who gave the feedback know that their voices were heard and led to change.

At the heart of L4G is a semi-standard survey instrument, which incorporates the Net Promoter System, or NPS, a tool developed by Fred Reichheld of Bain & Company that has been employed widely in commercial customer-feedback circles. NPS uses a statistically significant correlation between repeat customers and the following calculation: the number of respondents that rate their likeliness to recommend a company to a friend at 9 or 10 out of 10 (promoters), minus the number that rate it 0–6 (detractors), divided by total survey respondents. An NPS score of more than 40 percent is considered high. However, the NPS system builds customer loyalty by having companies reach out to both promoters and detractors to let them know how their suggestions are influencing change. NPS calls this a “feedback loop.”

Consistent with the spirit of creating high-quality feedback loops, the L4G

adaptation of NPS guides organizations to do five things:

**Design** a client survey with the following core questions:

- How likely is it that you would recommend this organization to a friend or family member?
- What is this organization good at?
- What could this organization do better?
- Overall, how well has this organization met your needs?
- How often do staff at this organization treat you with respect?

The first three questions are L4G’s version of the Net Promoter System. In addition to the core questions, L4G allows organizations to ask four optional demographic questions and add as many as five custom questions to their survey.

**Collect** client feedback via the brief L4G survey: The survey can be translated into multiple languages, including English, Spanish, Vietnamese, and Chinese. Responses can be gathered using kiosks, tablets, texts, phone calls, paper surveys, and in-person interviews.

**Interpret** client feedback: Organizations analyze client feedback to identify reasons for celebration and areas for improvement. To assist with this analysis, SurveyMonkey offers benchmarks that anonymously compare the survey responses of organizations that are doing similar work.

**Respond** to client feedback: Organizations determine which areas identified for improvement can be addressed in the near term and which are longer-term challenges, and then take action to improve services in line with client feedback where possible. Organizations also share client feedback with their funders, who may provide resources to help organizations address areas for improvement.

**Close the loop** with clients: The feedback cycle doesn’t end with simply implementing changes. Rather, it lets those who provided feedback know what is being done in response as we saw at CEO. By “closing the loop” in this way, L4G organizations are building stronger relationships with clients and sending the message that their clients’ voices hold power.

in its portfolio of feedback grants, which appeared to be helping nonprofits improve services. “Shared Insight realized and achieved most of what it set out to do,” the ORS report said.

But the evaluator also found that grants related to foundation sharing and listening had created little momentum for change. “Only a small number of foundations are known to have changed practice as a result of Shared Insight’s first round of funding,” the report concluded.

On the heels of this finding, Shared Insight changed its goal statement from creating a “[g]reater culture of openness in foundations, characterized by both more sharing and listening,” to ensuring that “[f]oundations and nonprofits are meaningfully connected to each other and to the people and communities we seek to help, and more responsive to their input and feedback.” Stachowiak says, “There were some who thought feedback was part of foundation openness. But you have to hear and respond to feedback to be open, so now we talk about, ‘How do you get foundations to use feedback?’”

To further assess L4G, Shared Insight hired Harder+Company to mine survey data from 29,000 L4G survey respondents. Harder’s job was threefold: to identify patterns and differences in respondent feedback—both quantitative and qualitative—by segmentation criteria such as race, gender, and age; to assess the effectiveness of the survey questions; and to judge the efficacy of NPS in the nonprofit context. What they learned gave both heart and pause, and led to Shared Insight’s next pivot.

## GRAPPLING WITH EQUITY, DIVERSITY, AND INCLUSION

Long before the Harder analysis landed, a conversation brewed among Shared Insight’s core funders around addressing equity (racial, gender, and more), diversity, and inclusion, or EDI.

Core funders represented diverse backgrounds on a number of dimensions, but of their reps to Shared Insight (one or two from each of the eight funders at the table by 2015), only three identified as people of color: Alandra Washington and Arelis Diaz of WKKF, and Chris Cardona of Ford. Each came from foundations grappling with EDI—particularly issues of race. Washington notes, “You can have equity without having racial equity. We’re hopeful the conversations about race can enter into the analysis. ... How are we seeing feedback from people of color? And how can we address it?”

She and Diaz wanted to articulate a grantmaking lens sensitive to power structures and imbalance, one that went beyond L4G’s focus on voices least heard. But talks weren’t always comfortable. “I probably made some rookie mistakes ... in terms of how I chose to bring the discussion forward,” Cardona says. He and Diaz frequently pushed for Shared Insight to take on EDI explicitly, based on Ford’s and WKKF’s experiences rethinking their own practices and staffing with an EDI lens.

The JPB Foundation’s president and chair, Barbara Picower, another strong proponent of EDI, strove to foster EDI dialogue at her office. Others at the core funders’ table had less authority to act, and it was unclear whether much was happening at their diverse

set of organizations. One seminal meeting in March 2016 held at Hewlett saw each person at the core funder table describe his or her foundation’s stance toward EDI. “It was maybe a three-hour conversation,” recalls Kathy Reich, at the time representing Packard. “The Black Lives Matter movement had been born. It was all raw and new. I mean, issues of race have always been with us, but they were at the top of the national agenda.”

From that meeting forward, with funders’ blessing, Shared Insight staff began to make changes. Within the year, Tuan had contracted EDI consultant Gita Gulati-Partee to join her team as a thought partner and advisor. By 2017, Threlfall began to diversify Shared Insight’s growing technical assistance staff, which coached L4G grantees. In parallel, Tuan and Louie stepped up L4G outreach in the Deep South, garnering more proposals from the region. In 2018, Shared Insight formalized a funder subcommittee to convert commitment to EDI into practice.

The year 2017 also marked the third round of L4G grants. As these grants rolled out, Shared Insight voted to extend the fund for another three years and open its doors to more core funders. With an influx of six (and exit of one) came more voices for EDI. All 13 met on November 30, 2017, in Palo Alto, California, for the unveiling of Harder’s L4G data findings at the Gordon and Betty Moore Foundation, which had joined the core funders in 2015.<sup>1</sup>

A number of Harder’s findings heartened: Two thirds of respondents ranked the organizations that served them a 9 or 10 out of 10 with regard to how likely they were to recommend them. However, every organization had some clients who gave low marks, and a few organizations received very low ratings overall. This distribution bore out the method, as those lagging could learn from those leading. Moreover, analysis by Harder found strong alignment across the survey questions, indicating that NPS made sense to its respondents.

But there was disturbing news, too. The segmentation showed that, on average, youth respondents gave much lower service ratings. Most troubling was a first-blush finding that people of color on average rated services less positively than whites, but with variability by race and service. Deeper data mining showed a strong overlap between respondents of color and youth, blurring correlations. The real insight was that every organization would likely find racial, gender, age, and ethnicity insights if it disaggregated its data. “It was not that a particular group was consistently having a better experience than others,” Threlfall says. “The picture was more complex.”

The data also sounded a wake-up call for marquee grantees such as CEO, which, according to Dudding, hadn’t prioritized looking beyond its aggregate NPS data.

Another new core funder, The James Irvine Foundation, based in San Francisco, had just completed a community listening tour with the people it wanted to help: working Californians struggling with poverty. The foundation used first-person insights to further inform strategy and grantmaking. Irvine representatives Kim Ammann Howard and Kelley Gulley shared their experience



at the Moore gathering. Coincidentally, this took place two days after Black Lives Matter announced its holiday boycott of stores run by white people and as another set of overlooked voices, those of exploited women, swelled to a crescendo with the #MeToo movement. Against this national backdrop, the Harder data and Irvine testimony reaffirmed the push by Shared Insight members to make EDI an explicit priority.

Core funders present stated how each could commit to the goals of equity and inclusion at its own foundation. What they didn't discuss was the potential to learn from their 60 L4G cofunders. Yet one of them, the Boston Foundation, was already seeing how feedback connected to empowerment at its L4G nominee, Union Capital Boston (UCB). UCB was founded by siblings Anna and Eric Leslie, a former charter school teacher and principal, respectively. It aims to help adults in lower-income neighborhoods of Boston get involved in local schools and communities. The Leslies saw 20th-century citizen movements give way to a disconnect between people and local organizing and wanted to draw parents more deeply into students' lives and community spaces. They began to adapt the concept of consumer loyalty cards to promote community loyalty. Today UCB's more than 1,100 members in urban Boston can earn gift cards of up to \$500 per year for hours spent going to a school Parent-Teacher Association meeting, a neighborhood meeting, or a rally at City Hall. The cards more than offset the cost of getting there.

Diana Garcia, a single mother of four, got involved with reward-eligible activities including parenting classes and a trip with her kids to the nation's capital. But her loyalty to the program skyrocketed when her first gift card arrived. "My kids had asked for a ridiculous Christmas present, character bed sheets, and I couldn't afford it," said Garcia in an interview. "Lo and behold, in the mail there was a \$150 gift card. I was hooked." By the time UCB began implementing its L4G grant, it had helped Garcia, who has cerebral palsy, to gain the confidence to transition from public assistance to employment as a network leader in Boston's Roxbury and Jamaica Plain neighborhoods. She took the survey and also promoted it to others.

"I learned a lot through the survey," said Garcia. "We have a lot of really educated [members] at UCB. They have bachelor's degrees or master's degrees. That told me I could do more educational outreach. Anything that you can get a certificate in, our members are on it." Garcia also learned that many had gained employment, as she had, since joining UCB.

For Eric Leslie and UCB colleague Laura Ballek, who oversees measurement, L4G responses exposed a gap in their program model: a lack of peer-to-peer learning. So they initiated "network nights," which bring members together at least twice a month to get to know one another, talk about information, and share resources they've



found. "We had people who have talked about the opioid epidemic in Massachusetts ... about gun violence in schools," Ballek says. "I think we're at another inflection point. It's time for us to implement another listening survey to say, 'What do you want this space to become?' The biggest thing that we received from [L4G] is this mind-set of continually listening for feedback."

Like Brad Dudding at CEO, Eric Leslie realized that the next step in EDI should be changes to governance. He set in motion a process for network members to join the board.


UCB's and CEO's experiences may hold part of the answer to Shared Insight's quest to connect feedback to EDI, a quest whose urgency grows. A year ago, Ford halved its stake in Shared Insight to \$1 million per year to pursue additional priorities. Meanwhile, Pennington took on the role of executive vice president at Ford and rotated her cochair role to Reich, who had joined the foundation from Packard in June 2016. Despite the demands of her new role, Pennington prioritized remaining at the Shared Insight table, asking tough questions about whether Shared Insight's agenda pushed hard enough on EDI. "I've come to believe that feedback alone does not get to fundamental issues of structural inequality, and discrimination and racism or any -ism," Pennington says. "Feedback without also working toward those shifts—even feedback that would cause improvement of services—is necessary but not sufficient."

## BUILDING THE FIELD

On March 7, 2018, Pennington and other Shared Insight funders gathered in New York at the Rockefeller Foundation for their triennial meeting. There, members wrestled with tough issues in preparation for a major milestone: making L4G publicly available through SurveyMonkey as part of a larger hope to build the field of feedback. The main challenges they faced were fourfold: to engage funders more deeply; to apply an EDI lens more consistently to their work in all contexts; to adapt L4G and other feedback tools to more fields, such as advocacy and international development; and to scale L4G to reach thousands of nonprofits.

Cochair Reich guided the group through a packed agenda, including how to spend the L4G budget in the coming year. Louie presented options and debate ensued. What should they do? Invite another



 Valerie Threlfall (center), project lead for Listen for Good, and Melinda Tuan (right), managing director of the Fund for Shared Insight, visit the Silicon Valley Children's Fund in October 2017.

round of grantees? Focus on building for the publicly available version of L4G on SurveyMonkey? Coalesce the 60 cofunders of L4G into an allied force for feedback? Opening up the tool for any nonprofit to use could scale the approach, but would it also dilute their focus on vulnerable populations?

Jennifer Hoos Rothberg and Jon Gruber of Einhorn Family Charitable Trust joined the core funders in 2017. They learned about this focus the hard way, when the L4G candidate EFCT nominated in 2017 failed to make the cut because the organization did not specifically serve disadvantaged populations. “I totally get it,” Rothberg said. “It now makes much more sense to me that we’re prioritizing where and how we’re spending our limited resources ... with the goal that we’ll extract lessons to build a robust field of feedback for the broader sector later.”

Others pressed stubborn questions: How could Shared Insight catalyze a field of feedback without first working on openness within and between its own foundations? Without first applying the EDI lens to themselves? Without putting feedback squarely in the service of righting inequities and eradicating discrimination?

“Is the goal to get funders to give money to nonprofits to collect beneficiary feedback? Or is our goal for funders to change their own behavior in ways that would model two-way, open, honest feedback practice in our everyday actions, including with our grantees?” Rothberg asked. “There are inherent power dynamics that are keeping funders very far away from the people who we are trying to help.”

As core funders mulled L4G’s future, they also reflected on their own: Tuan taped posters on the wall listing the November commitments each had made to live Shared Insight’s updated goals and asked members to indicate their progress with red (none), yellow (some), or green (significant) stickers. New core funders, such as Irvine, the Edna McConnell Clark Foundation (EMCF), and Rockefeller had begun their relationship with Shared Insight as L4G cofunders or sidecars, and brought fresh perspective. “Our team is charged with building the listening practice at the foundation,” said Gulley, a senior program officer at Irvine. “It’s actually about making sure we ‘walk the talk’ of using feedback to better understand those whom we seek to help.”

Lisette Rodriguez of EMCF expressed the importance of one more round of L4G grants before beta launch to motivate more cofunders to adopt and promote the approach. When Reich called for yeas and nays, the L4G budget and plan for a final L4G round of grants before taking L4G public passed by a wide margin. (That final round closed in June 2018.)

## THE ENDGAME

Shared Insight members increasingly envision an endgame that will see the coalition evolve from grantmaker and implementer to field builder, making listening and responding a critical method by which nonprofits and funders can advance equity and inclusion. It’s a tall order. “It’s a much harder problem to fix than coming up with a scalable feedback mechanism,” Reich says.

Everyone recognized the challenge. Once again, lessons from grantees provided insight. The day before the March 2018 meeting, funders visited L4G grantees in New York City. One, a member of the NYC STEM Education Network, was distinguished by its determination to figure out customer experience by race. The after-school provider had surveyed just 27 students as part of its L4G pilot. While the sample was tiny, disparities by race were enormous: White students rated the program more than twice as highly as Latinos, four times higher than black students, and more than six times higher than Asians.

The candor with which the nonprofit shared this bad news embodied Shared Insight’s goal of openness and meaningful connection. “The whole reason we do evaluation is to share the good stuff and the bad stuff,” the nonprofit’s director of evaluation says. Her colleague adds: “We’re trying something we’ve never done before ... and will make recommendations [based on] what we’ve learned.”

Her words echoed the ethos of Shared Insight: Exploring something untried. Learning and improving. And anchoring change in an unchanging culture of creating solutions together.

And that’s what has made Shared Insight’s story of funder collaboration different from many. It began with a conviction that it could design a solution at scale—not to address one social problem, but to elevate nonprofit and funder effectiveness in addressing *any* social problem. The collaborative kept correcting course until it landed on L4G; then, through a grants program, it persuaded scores of funders and nonprofits to adopt L4G, with hopes that their results would propel paid subscriptions by 2020. Today, Shared Insight continues to move from course correction to redesign to bully pulpit, with sights set on developing versions of L4G for advocacy organizations and international NGOs and devising more ways to connect funders and nonprofits to community.

Yet some wonder if Shared Insight needs to invest in other aspects of unlocking change. Should it hire a counterpart to Threlfall, focused on building a shared understanding among *foundations* of the benefits of listening to voices least heard? Could it identify the best intermediate milestones that will lead to a win for feedback loops?

“Feedback is, of course, not everything, but it has the potential to pay big dividends in respect and tangible improvements,” Twersky says. “We can fight for equity—for women’s health rights, for example—but if those women who have won rights enter a clinic and are not treated with quality care, respect, and dignity, what have we achieved?” ■

## NOTE

- 1 The Fund for Shared Insight’s funding partners for 2017–20 are: Rita Allen Foundation, Barr Foundation, the Edna McConnell Clark Foundation, Einhorn Family Charitable Trust, Ford Foundation, Bill & Melinda Gates Foundation, William and Flora Hewlett Foundation, The James Irvine Foundation, The JPB Foundation, W.K. Kellogg Foundation, Gordon and Betty Moore Foundation, the David & Lucile Packard Foundation, and the Rockefeller Foundation. The sidecar funders are: Liquidnet, MacArthur Foundation, Omidyar Network, Rockefeller Brothers Fund, and Walton Family Foundation.