THE CENTER
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PHILANTHROPY

Hearing from Those We Seek to Help

Nonprofit Practices and Perspectives in Beneficiary Feedback

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ABOUT THE CENTER FOR EFFECTIVE PHILANTHROPY

MISSION

To provide data and create insight so philanthropic funders can better define, assess, and improve their effectiveness—and, as a result, their intended impact.

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RITA ALLEN FOUNDATION

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This research is based on CEP's independent data analyses, and CEP is solely responsible for its content. The report does not necessarily reflect the individual views of the funders, advisers, or others listed throughout this report.

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Feedback
FEEDBACK FORM
SEND

INTRODUCTION

Requests for feedback have become ubiquitous in the daily lives of consumers of goods and services. We receive a steady flow of queries via email and phone—requests for input on what we liked and what we didn't, what worked and what didn't, and whether we'd recommend what we bought to others. We have come to expect that, when we make a purchase, we will be asked to provide feedback about that experience.

But what about those receiving programs or services that are delivered by nonprofit organizations? What about the teenager in the after-school program for at-risk youth or the homeless mother receiving shelter for herself and her children?

For nonprofits, hearing from those they serve is more complicated and arguably even more important than it is for a business. After all, power dynamics can distort or even eliminate naturally occurring feedback loops. People who receive help from nonprofits are frequently not the ones paying for the help and may be hesitant to provide candid feedback for fear of jeopardizing their ability to continue to be served.

Yet nonprofits serving their intended beneficiaries need to find ways to hear from those they seek to help if they are to be effective.[1] Nonprofits that understand the experiences of those using their programs and services can be more responsive to those they serve, can better gauge whether their work is accomplishing the desired outcomes, and can empower their constituents to have a voice.[2] Most significantly, nonprofits can learn from intended beneficiaries about what is and is not working—and use that information to drive improvement. They can also use that information to ensure that they are not *adversely* affecting those they seek to serve.[3]

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[1] Fay Twersky, Phil Buchanan, and Valerie Threlfall, "Listening to Those Who Matter Most, the Beneficiaries," *Stanford Social Innovation Review* 11, no. 2 (Spring 2013), http://www.ssireview.org/articles/entry/listening_to_those_who_matter_most_the_beneficiaries.

[2] David A. Campbell, Kristina Lambright, and Laura Bronstein, "In the Eyes of the Beholders: Feedback Motivations and Practices Among Nonprofit Providers and their Funders," *Public Performance and Management Review* 36, no. 1 (2012): 7–30.

[3] When a tsunami hit Southeast Asia in 2004, many aid groups provided resources to help residents of villages in the affected areas, but some of the assistance unintentionally shamed aid recipients. In an evaluation the Fritz Institute conducted to assess the effectiveness of this aid, the authors noted "When [individuals, families and communities] are at their most helpless and vulnerable, practices meant to help them can strip them of their dignity and make them more vulnerable. For example, the provision of used clothes that were climatically or culturally inappropriate proved to be humiliating, particularly to the women in India and Sri Lanka." Anisya Thomas and Vimala Ramalingam, "Recipient Perceptions of Aid Effectiveness: Rescue, Relief, and Rehabilitation in Tsunami Affected Indonesia, India and Sri Lanka," *Fritz Institute* (2005), http://www.fritzinstitute.org/PDFs/findings/NineMonthReport.pdf.

As if those reasons are not enough motivation, nonprofits are also facing increasing external pressure to collect beneficiary-perception data. Charity Navigator has announced plans to start rating nonprofits based in part on whether they collect or share beneficiary feedback.[4] Another organization, GreatNonprofits, offers a Yelp-like platform where beneficiaries (as well as donors and volunteers) can share anonymous feedback about nonprofits.[5]

Some who have advocated for a greater focus on the views of intended beneficiaries assert that nonprofits do not prioritize this focus today. In the *Chronicle of Philanthropy*, Water for People CEO Ned Breslin writes, "Unfortunately, this hunger for customer feedback hasn't caught on in the nonprofit world."[6] Others have suggested that nonprofit leaders do seek to understand the perspective of intended beneficiaries but are inhibited by various constraints in their ability to gather quality feedback and use it to improve.[7]

Given the differing views, we wanted to understand:

What is the state of practice among nonprofits? Are organizations gathering feedback from intended beneficiaries and using it to drive improvement?

We were also interested in understanding nonprofit leaders' views on the role that foundations play when it comes to hearing from—and understanding—those whom their grantees seek to serve.

How well do nonprofit leaders believe their foundation funders understand their beneficiaries and take into account their needs when setting funding priorities and strategies?

What are the characteristics of those foundations that nonprofit leaders judge to have a better understanding of the needs of intended beneficiaries?

Our focus was not on the entire universe of U.S. nonprofit organizations, but rather on organizations that are typical of those receiving some foundation funding. (See Sidebar: *The Grantee Voice: Feedback for Foundations.*) Our data indicate that among these nonprofits, most are, in fact, collecting feedback from their beneficiaries and are using that feedback to make improvements to their programs and services. Although the methods vary, it seems clear that the nonprofits we surveyed are committed to hearing from those they seek to help.

Nonprofit leaders have a critical take, however, on the extent to which their foundation funders understand their intended beneficiaries' needs. They see this limited understanding reflected in foundations' decision-making in important ways. That said, the nonprofit leaders we surveyed do point to exceptions—foundations that have a deeper understanding of the needs of intended beneficiaries and that act in specific ways that nonprofits value.

[4] "How Do We Plan To Evaluate Results Reporting?" *Charity Navigator*, http://www.charitynavigator.org/index.cfm?bay=content.view&cpid=1507#.U3ItG_ldWSo.

[5] See GreatNonprofit's website: http://greatnonprofits.org/about/.

[6] Ned Breslin, "Sharing Data for All the World to See Helps Charities Do Better Work," *Chronicle of Philanthropy*, February 9, 2014, http://philanthropy.com/article/Sharing-Data-for-All-to-See/144557/.

[7] The Alliance for Children and Families, United Neighborhood Centers of America, and Keystone Accountability conducted a study in 2009 based on 75 human services organizations and found "that agency leaders embrace feedback and its potential for creating learning relationships with their primary constituents, but a variety of critical factors inhibit them from creating the conditions for quality feedback and mutually accountable relationships around it." David Bonbright, David Campbell, and Linda Nguyen, "The 21st Century Potential of Constituency Voice: Opportunities for Reform in the United States Human Services Sector," *Alliance for Children and Families, United Neighborhood Centers of America, and Keystone Accountability* (March 2009), http://alliance1.org/sites/default/files/constituency_voice.pdf.

FINDINGS

1 Most nonprofits are collecting and using feedback from their beneficiaries to improve their programs and services.

2 Nonprofit leaders believe most of their foundation funders lack a deep understanding of their intended beneficiaries' needs—and they believe this lack of understanding is reflected in foundations' funding priorities and programmatic strategies.

3 Nonprofit leaders say the foundations that best understand their organizations' intended beneficiaries' needs actively engage with their organizations and their work; are humble, open, and collaborative in their approach; or are deeply connected to the issues or communities.

The Term "**Beneficiaries**"

Many terms are used to describe those whom nonprofits and funders aim to affect through their work: clients, end-users, participants, constituents, beneficiaries. We chose to use the term "beneficiaries" in this research effort. To ensure that all survey respondents had a consistent understanding of the term "beneficiaries," we defined it at the beginning of the survey as "those your organization seeks to serve through the services and/or programs it provides."

In survey items about nonprofits' or foundations' understanding of the nonprofits' beneficiaries, we used the term "intended beneficiaries" to capture both those whom nonprofits are currently serving and those whom nonprofits are not currently serving but may also benefit from their programs or services.

The Grantee Voice: Feedback for Foundations

In 2013, 514 nonprofit leaders from across the county agreed to serve on the Center for Effective Philanthropy's (CEP) *The Grantee Voice* panel. (See "Appendix: Methodology" for more information about how the panel was created.) By joining the panel, these nonprofit leaders agreed to complete short surveys about topics relevant to their experiences working with foundation funders. Surveys of grantees conducted for *The Grantee Voice* panel are separate and distinct from the surveys of grantees that CEP administers for individual foundations as part of the Grantee Perception Report (GPR)® process.

The goals for *The Grantee Voice* are to

- Collect timely data to inform foundation practices;
- Gather nonprofit perspectives on working with foundations broadly;
- Further contribute to foundations' knowledge of how they can work most effectively with nonprofits.

Through brief publications based on surveys from this panel, we aim to contribute data, as well as new questions, to further important conversations that are happening—or need to be—for foundations and nonprofits to work most productively together. Other *Grantee Voice* reports include *Room for Improvement: Foundations' Support of Nonprofit Performance Assessment*, *Foundation Transparency: What Nonprofits Want*, and *Nonprofit Challenges: What Foundations Can Do*. These publications are available at www.effectivephilanthropy.org.

Who Are *The Grantee Voice* Respondents to This Survey?

The organizations on *The Grantee Voice* panel are representative of U.S.-based organizations with between $100,000 and $100 million in expenses and receive funding from foundations that give at least $5 million annually. (See "Appendix: Methodology" for more information on how this panel was formed.)

The response rate for this survey was 46 percent. The 235 nonprofit leaders (holding such titles as executive director, president, or CEO) who responded represent a mix of nonprofits that vary widely in size and dependence on foundation money, as shown in the table below. Respondents' organizations are located across the country and represent a range of program areas, including human services, the arts, health, community development, the environment, and education.

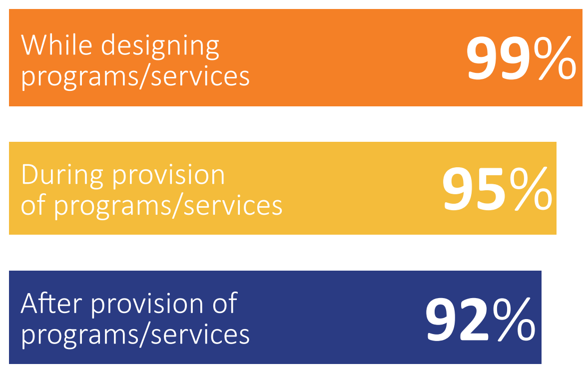
ORGANIZATIONAL MEASURE	RANGE	MEDIAN VALUE
Staff size (in full-time equivalents, FTEs)	< 1 FTE to 1,400 FTEs	16 FTEs
Annual expenses	About $100,000 to $93 million	$1.7 million
Proportion of revenue coming from foundation grants	< 1 percent to 98 percent	15 percent

1 Most nonprofits are collecting and using feedback from their beneficiaries to improve their programs and services.

COLLECTING FEEDBACK: WHEN AND HOW

Collecting beneficiary feedback is a widespread practice at nonprofit organizations in our sample. Almost all the nonprofit leaders we surveyed report that their organization solicits input from beneficiaries when designing programs or services, during the provision of programs or services, or after the provision of programs or services. (See Figure 1.)

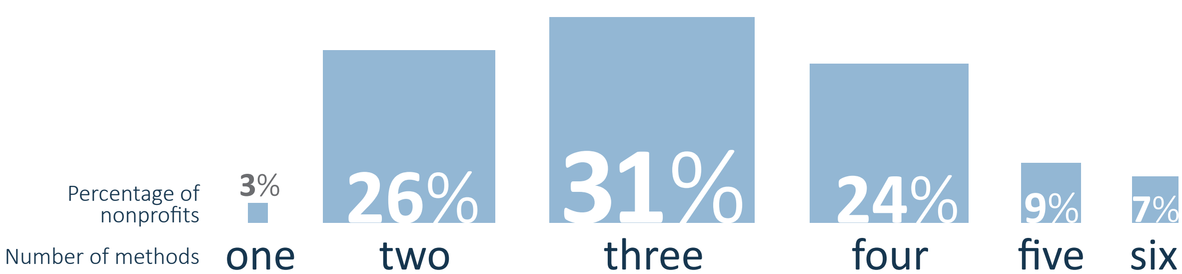
FIGURE ONE.
Percentage of Nonprofits that Collect Beneficiary Feedback



Nonprofits tend to collect feedback from beneficiaries throughout the life cycle of their programs or services but not consistently: Of nonprofits surveyed, 89 percent tend to collect feedback both during and after the provision of programs or services, but only 37 percent of nonprofits *always* do so.[8]

Additionally, nonprofits are using a variety of methods to solicit feedback from beneficiaries—the typical nonprofit uses three types of methods. (See Figure 2.)

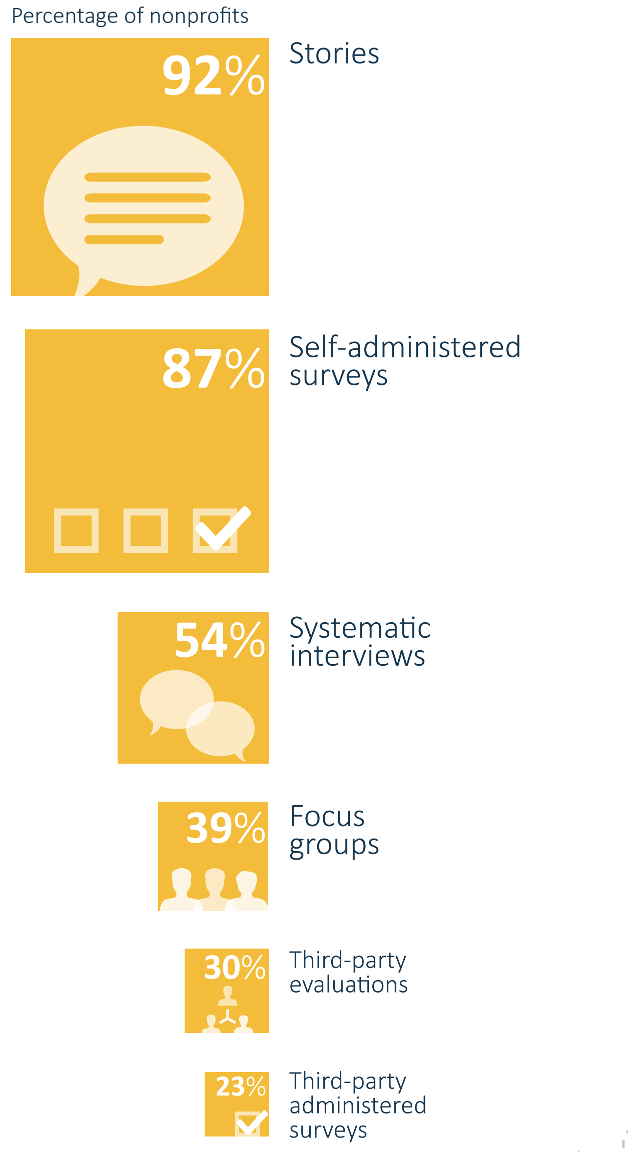
FIGURE TWO.
Number of Methods Nonprofits Use to Collect Beneficiary Feedback



[8] Only three percent of nonprofit leaders say their organization does not collect feedback at both points because it is not possible given who their beneficiaries are.

Nonprofits tend to be doing the work themselves, rather than using third-party evaluations or third-party administered surveys. The most commonly used methods are collecting stories from beneficiaries and surveying beneficiaries directly. (See Figure 3.)

FIGURE THREE.
Methods Used to Collect Beneficiary Feedback



Resource constraints are the most common challenge in nonprofits' efforts to collect information about the needs and experiences of their beneficiaries.[9] (See Figure 4.) Even nonprofit leaders whose organizations are receiving foundation support for their efforts to collect beneficiary feedback cite lack of resources as their primary challenge to learning more about their beneficiaries. (See Sidebar: Foundation Support for Hearing from Beneficiaries.)

Comments from nonprofit leaders illustrate the various challenges nonprofits face in collecting feedback from beneficiaries. One nonprofit leader says, "One of the other limitations we have is the technology to really convey the stories of beneficiaries and the means for two-way communication. Investments in technology development, such as apps, would be really helpful." Another nonprofit leader says, "We need to begin to do a better job of measuring outcomes and impact, and not just outputs. This will entail improving our communications with our beneficiaries, especially through 'customer satisfaction' surveys and interviews."

Several nonprofit leaders discussed the difficulty of doing

[9] These findings align with data from other reports that show that limited staff time, financial resources, and staff expertise are the biggest barriers to organizations in the social sector evaluating their work. See "State of Evaluation 2012," 12, http://www.innonet.org/resources/files/innonet-state-of-evaluation-2012.pdf; Rachel Christian et al., "The Reality of Measuring Human Service Programs: Results of a Survey," *Idealware* (January 2014), 19, http://www.idealware.org/sites/idealware.org/files/IDEALWARE_HSSURVEYREPORT_Jan2014v4.pdf; "2014 State of the Nonprofit Sector Survey: National Results," *Nonprofit Finance Fund*, (March 2014), 16, http://nonprofitfinancefund.org/files/docs/2014/2014survey_natl_full_results.pdf.

Who Are the **Beneficiaries**?

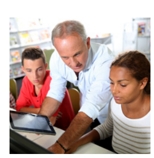
The organizations that responded to our survey serve many different groups of beneficiaries. About half of nonprofit leaders report their organizations serve beneficiaries who fall into multiple groups.

Other groups of beneficiaries being served by responding nonprofits include the elderly, those with disabilities, artists, the homeless, those facing physical or mental health challenges, victims of violence or abuse, immigrants, women, and animals.

We did not find any meaningful differences in nonprofits' practices of collecting or using beneficiary feedback based on the group of beneficiaries their organization is serving.

43 percent of responding nonprofits are serving the needs of children or youth.

28 percent are serving the needs of low-income populations.



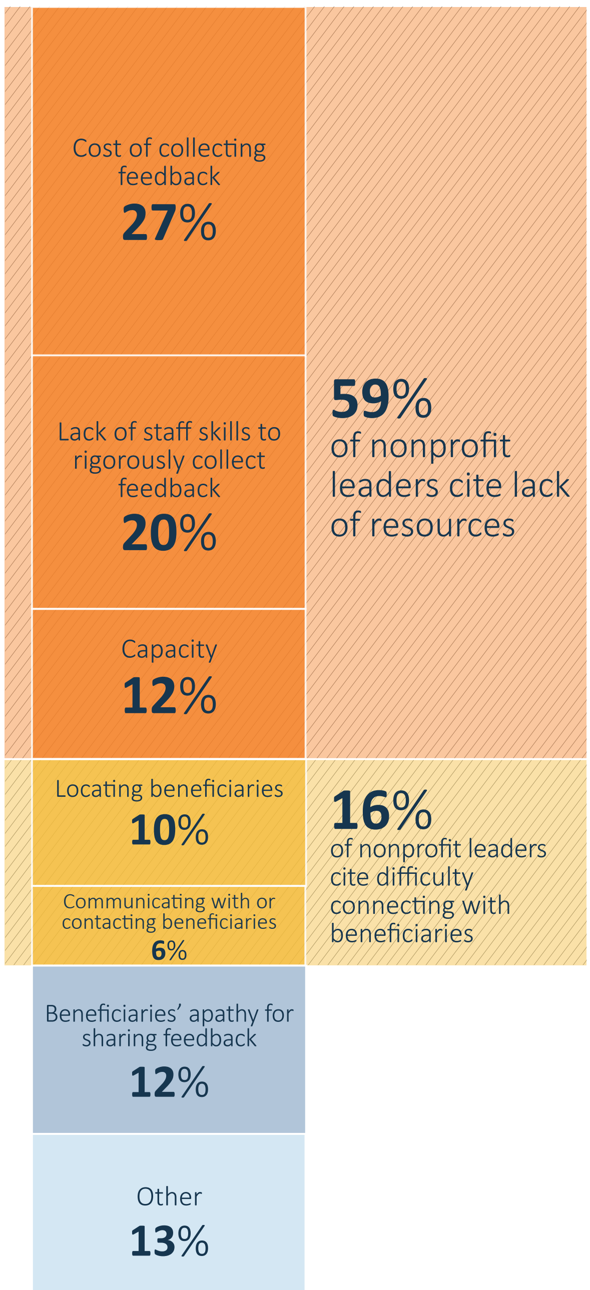
20 percent are serving the needs of students.

this work with thin—and stretched—staff resources. "Basically, collecting feedback from beneficiaries is a valuable exercise, but it is poorly funded, and there is little dedicated staff time to conduct it," says one respondent. Another writes, "We would incorporate much more of this if we had dedicated support for the purpose. Like most nonprofits, our staff is stretched thin, so support for consultant evaluations would be valuable."

FIGURE FOUR.

Nonprofits' Greatest Challenges in Their Efforts to Understand Beneficiaries' Needs and Experiences

Percentage of nonprofits



Foundation Support for Hearing from **Beneficiaries**

Just less than half of nonprofits report receiving financial or nonmonetary assistance from their foundation funders for gathering beneficiary feedback. (See Figure 5.) Nonprofits that do receive this support from foundations are more likely to collect feedback through a greater number of methods.[10]

Of nonprofits that do not receive assistance for this work from foundations, 90 percent have never received it. When nonprofits do receive this funding from foundations, they tend to have asked for it.[11]

Yet resource constraints are still the primary challenge for these nonprofits to learn more about their beneficiaries' experiences with their programs and services. One nonprofit leader whose organization is currently receiving foundation support for this work says, "Understanding the needs and experiences of beneficiaries is of primary concern to this organization, and while we prioritize this, we feel that we could really use additional support in improving our evaluation tools. We receive very minimal funding for this kind of work and would benefit from financial and technical support in this area."

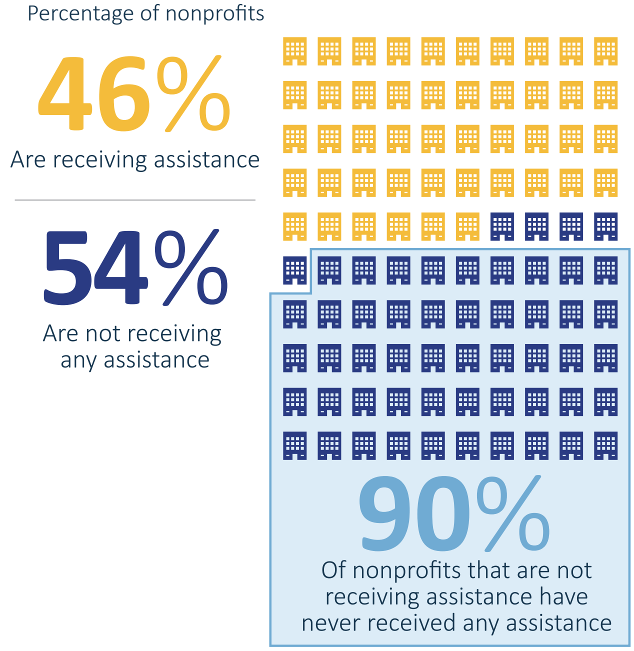
[10] Nonprofits that receive this support from foundation funders are statistically significantly more likely to be collecting feedback from beneficiaries through three or more methods.

[11] Of those nonprofit leaders whose organizations have received assistance from foundation funders, almost 60 percent say their organization tends to ask for it; only 18 percent report that their foundation funders tend to raise the issue of providing it.

FIGURE FIVE.

Financial or Nonmonetary Assistance Received from Foundations for Beneficiary Feedback

Percentage of nonprofits



USING FEEDBACK

Almost all nonprofit leaders say that their organization is using the feedback it collects from beneficiaries to improve its work to at least some extent; 61 percent of nonprofit leaders say that their organization uses feedback to a great or extreme extent. (See Figure 6.) Nonprofits that use feedback to a greater extent to improve their work also collect feedback through a greater number of methods.[12]

About 70 percent of survey respondents say they have made changes to their programs or services in response to beneficiary feedback, offering a wide range of examples:

> "Our domestic violence shelter staff meets weekly with clients and makes program adjustments based on the needs of the population in shelter. We always follow up on client suggestions—so, for example, we make modifications to the assignment of chores based on the physical or mental health needs of our clients."

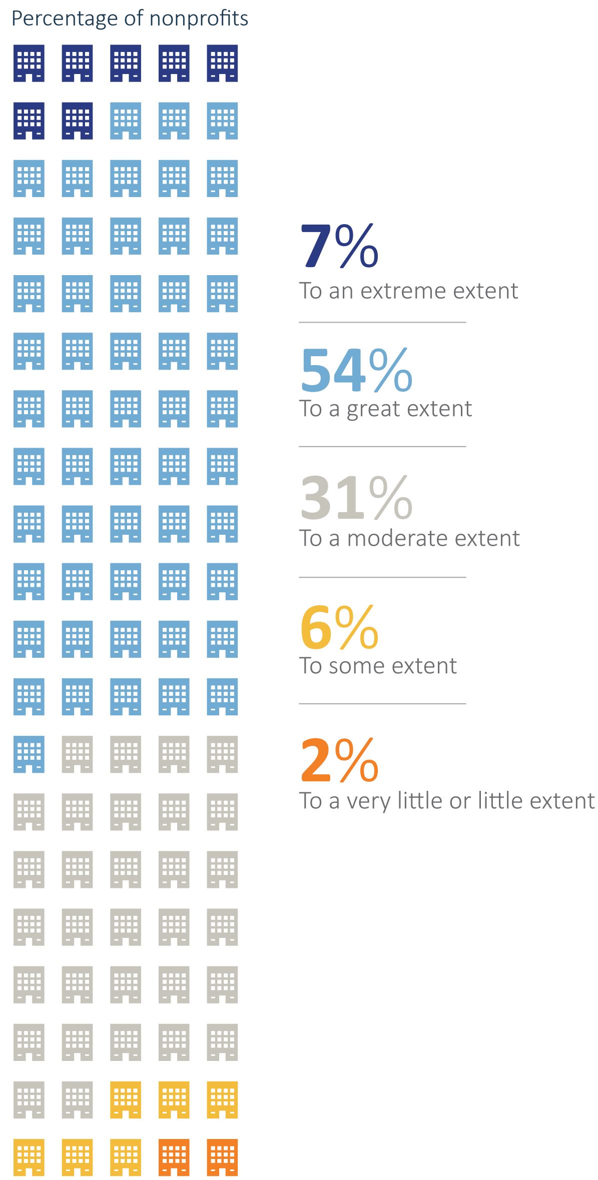
> "All of the youth complete evaluations at the end of the programs, and we partner with a local university and psychologist in distributing psychological questionnaires to the participants. The students compile the results of the questionnaires and evaluations and present the findings to the board of directors. The information provides evidence and/or information about the positive physical, emotional, and social impact of our programs. We expand and/or adapt our programs to meet the changing needs of those served by our organization."

> "As a result of client feedback and to improve outcomes, we have enhanced the case management services available at our organization. Now all who come for service get some level of case management, at varying levels of intensity and frequency."

> "We conducted a pre and post survey of the participants' knowledge before and after the training. This helped us understand the change in knowledge as well as when information/training was not translating into acquisition of knowledge or competency. Based on this information, we adjusted the curriculum to improve knowledge and knowledge retention."

It is clear from our survey data that, despite the challenges of cost and overstretched staff, collecting beneficiary feedback and using it to make programmatic changes is a common practice among the nonprofits in our study.

FIGURE SIX.
Extent of Nonprofits' Use of Beneficiary Feedback to Improve Their Work



[12] Nonprofits that use beneficiary feedback to a great or extreme extent to improve their work are statistically significantly more likely to be collecting feedback through three or more methods.

Nonprofit **Profiles**

In this report, we share profiles of three randomly selected nonprofit organizations whose leaders rated them in our survey as understanding their beneficiaries extremely well, collecting feedback through five or more methods, and using that feedback to a great or extreme extent to improve their work. We interviewed these leaders to understand more about how their nonprofits collect and use feedback from their beneficiaries. (See "Appendix: Methodology" for more detail.)

Nonprofit Profile

Crittenton Children's Center
SAINT LUKE'S HEALTH SYSTEM

Interviewee
Janine Hron, CEO

Location
Kansas City, MO

Year established
1896

Annual expenses
$21,737,925

Number of staff and volunteers
396 staff and 379 volunteers

> If you're in a service business, being responsive to the people you're trying to serve, I think, is pretty fundamental.

About the organization: Crittenton Children's Center provides psychiatric care to children, adolescents, and their families in the Kansas City region.

Why listen to beneficiaries? CEO Janine Hron says collecting feedback is how an organization learns about itself. "You learn what is a priority for those who need your care, you learn what is working well, and you learn the offenses you have committed. You can then use that information to make change," she says. "If you're in a service business, being responsive to the people you're trying to serve, I think, is pretty fundamental."

How is feedback from beneficiaries collected? Crittenton asks for feedback from children and their families through satisfaction surveys, focus groups, annual in-person feedback meetings with the board of directors, and pizza parties, to name a few ways. The organization also formed a resident council with children receiving inpatient services. "They do things like a student council would, they plan events that they want to do, they bring messages from their colleagues in the unit to give us feedback about the organization and the programs," says Hron.

Who collects the feedback? Hron says, "It might be the patient advocate, it might be the staff members who are working with the kids at a particular event. We are also a part of a larger health system, and so all of the inpatient satisfaction surveys [and]...anything that's written, does not come back to us; it goes to a department within the health system, and they aggregate everything and give us our reports back monthly and quarterly so that we have feedback to work from."

What's an example of feedback received and used? A parent whose child was receiving behavioral therapy from Crittenton told Hron that his daughter had shown the family the skills she had learned to modulate her emotions. He had found it helpful to understand what his daughter was experiencing and suggested that the Center teach parents the skills it was teaching their children. "We did two things with that information," says Hron. "We recognized that a lot of what we're teaching the kids, of course will be stronger if we're involving the family. So, we initiated a convenient way for families to engage in short skill-building kinds of sessions, just like their kids are doing, so that they have common tools and understand things that are that way. And we let the kids teach it and that's very empowering for the kids, and it sets up a whole different dynamic in the group."

Hron believes her organization could do an even better job closing the loop with those who provide feedback, though they do quite a bit internally with the feedback they receive. "We thank people who send us written responses; if there's something, usually negative, that we need to follow up on, we always do that separately by phone or by personal correspondence about their specific issue. Internally, [feedback] is shared with our board at a minimum quarterly, and we meet monthly with the leadership group, which is the directors of the departments across the entire organization and we identify any specific things that we need to address together there. The other group that sees [the feedback] is what we call our 'plan for care committee.' At the end of the day, the people who are in charge of our quality management and our patient advocacy are driving that process and making sure that we're being responsive."

Why is it important for your foundation funders to understand your organization's beneficiaries? Hron believes, "It is fundamental for [foundations] to understand the needs of the people we're serving, because otherwise, they cannot make informed decisions about the best priorities for where to spend their money."

What are some examples of foundations that have had a deep understanding of your organization's beneficiaries? In Hron's experience, foundations that have had a deep understanding of Crittenton's beneficiaries have made efforts to listen to the organization's staff about their needs and experiences. For example, Hron invited two foundations to join community advisory meetings to learn more about the needs and experiences of the children Crittenton serves. After listening to Crittenton's staff and partners, the foundations shared what they heard, helping Hron see the program in a broader context. "It was our funding partners who heard what [staff] were saying in a different way—they said to us, 'You are thinking of this like a service, but what you've got is so much more.'...They really helped us to realize this isn't a program, this is a whole model, and we can do more with this, and that allowed us to ask the right questions and tailor what we were doing to achieve a much more broad-based and impactful outcome." The foundations' counsel helped Crittenton grow its program into a model that was recently recognized by various media outlets, including *The New York Times*.

Another one of Crittenton's foundation funders that has stood out, in Hron's experience, acts "very hands-on. Not directing anything that is occurring, but listening, listening, listening. After every time I talk to them, they'll come back and say, 'I thought of you, would this be helpful?' They just keep bringing more resources. And that's so helpful, because again it's those different ears saying, 'You know, I'm afraid you might be going down the wrong path, think about this. Or that was so right on, and here's a little more depth about that.'" This type of engagement from foundations is helpful because "we're a healthcare organization," says Hron, "[and] as dynamic as healthcare is right now, and as on-point as the country is about mental health for children and adolescents, particularly given all the school situations and everything else, I think that more heads is better."

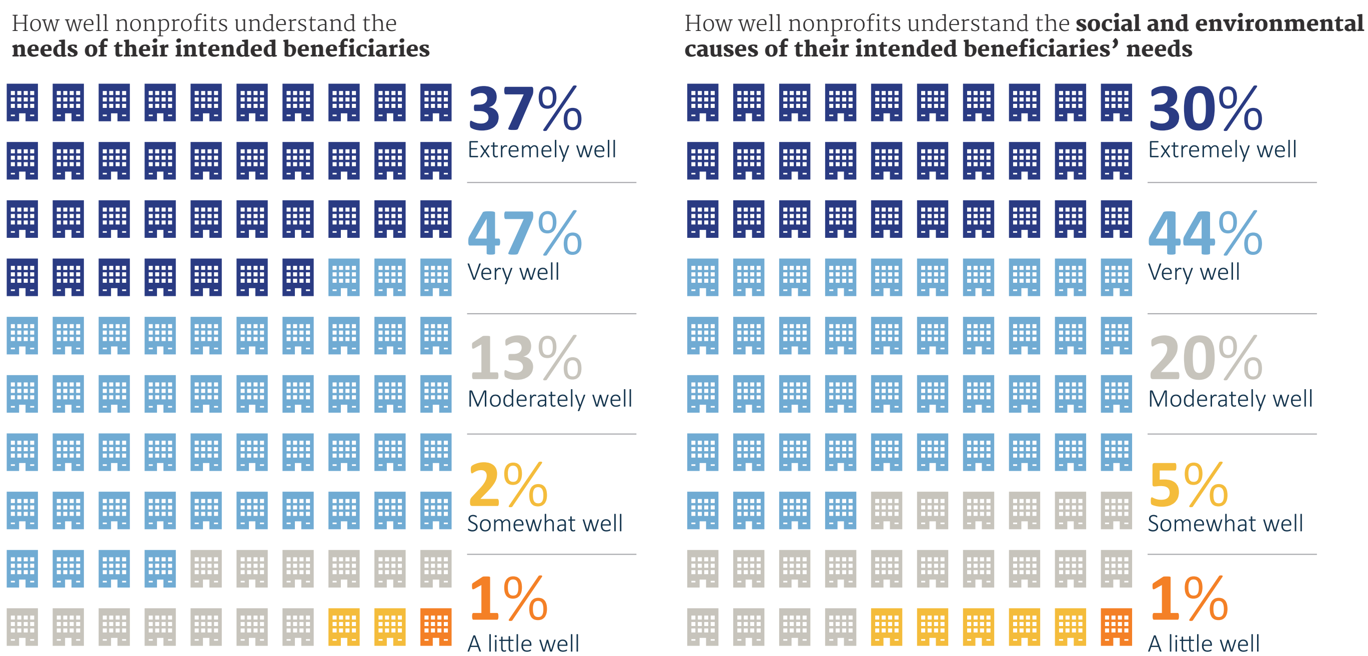
2 Nonprofit leaders believe most of their foundation funders lack a deep understanding of their intended beneficiaries' needs—and they believe this lack of understanding is reflected in foundations' funding priorities and programmatic strategies.

Nonprofits see themselves as possessing a strong understanding of their intended beneficiaries. (See Figure 7.) But they have a much tougher assessment of their foundation funders' understanding of their beneficiaries. (See Figure 8.)

FIGURE SEVEN.

Nonprofit Leaders' Perceptions of Their Organizations' Understanding of Intended Beneficiaries' Needs

Percentage of nonprofit leaders



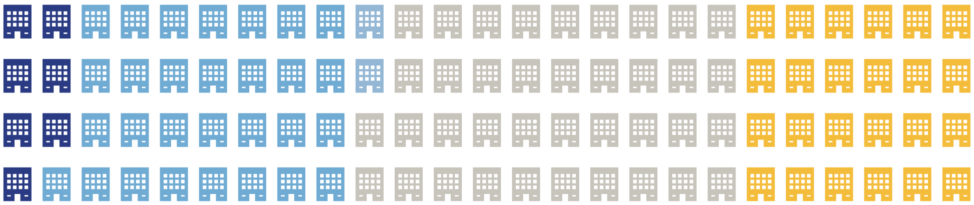
0% of nonprofit leaders say their organization understands their beneficiaries' needs, or the social and environmental causes of those needs, not at all well or not very well.

FIGURE EIGHT.

Nonprofit Leaders' Perceptions of Their Foundation Funders' Understanding of the Nonprofit's Intended Beneficiaries

Percentage of nonprofit leaders

How many of a nonprofit's foundation funders have a deep understanding of **the nonprofit's intended beneficiaries' needs**



7% All of their funders

31% Most of their funders

38% Some of their funders

24% Few of their funders

0% None of their funders

How many of a nonprofit's foundation funders have a deep understanding of **the social and environmental causes of the nonprofit's intended beneficiaries' needs**

3% All of their funders

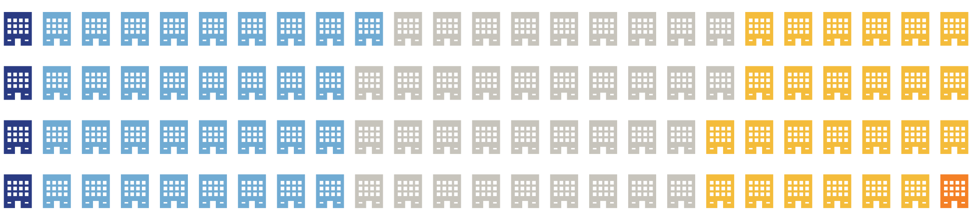
28% Most of their funders

39% Some of their funders

29% Few of their funders

1% None of their funders

With how many of a nonprofit's foundation funders is there **alignment between the nonprofit's and their foundation funders' understanding of the nonprofit's intended beneficiaries' needs**



4% All of their funders

33% Most of their funders

37% Some of their funders

25% Few of their funders

1% None of their funders

Perhaps it's not surprising that nonprofits see themselves as being in much better touch with their beneficiaries than their foundation funders. But the contrast between nonprofit perceptions of their own understanding and their perceptions of their foundation funders' understanding is stark. Furthermore, foundation leaders believe that understanding beneficiaries is important to their ability to have impact. In a 2013 survey CEP conducted of foundation CEOs, nearly three-quarters said that seeking beneficiary feedback could significantly increase a foundation's impact and more than half reported that their foundation seeks out feedback from their intended beneficiaries.[13] Yet the nonprofit leaders we surveyed don't see their organizations' foundation funders as having a deep understanding of their intended beneficiaries.

Nonprofit leaders see this lack of understanding reflected in foundations' funding priorities and programmatic strategies. A small proportion of nonprofit leaders responding to our survey say they believe that most or all of their foundation funders have funding priorities or programmatic strategies that reflect a deep understanding of their intended beneficiaries' needs. (See Figure 9.)

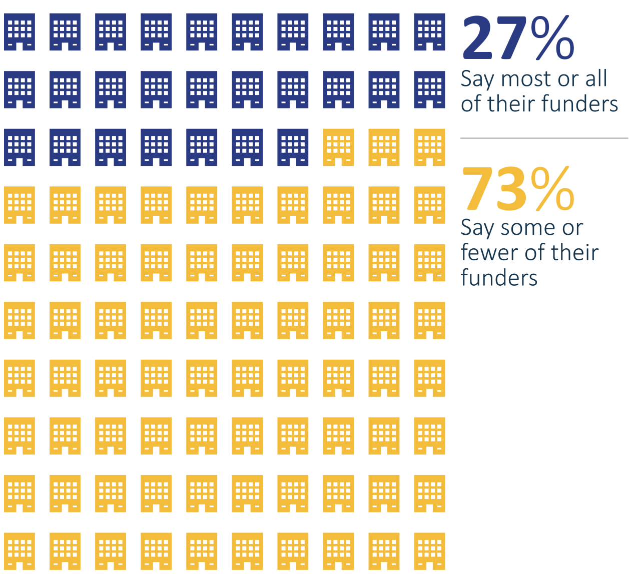
This perception of a lack of understanding on the part of foundations comes despite the fact that 60 percent of nonprofit leaders say their organization shares beneficiary feedback with most or all of its foundation funders.

FIGURE NINE.

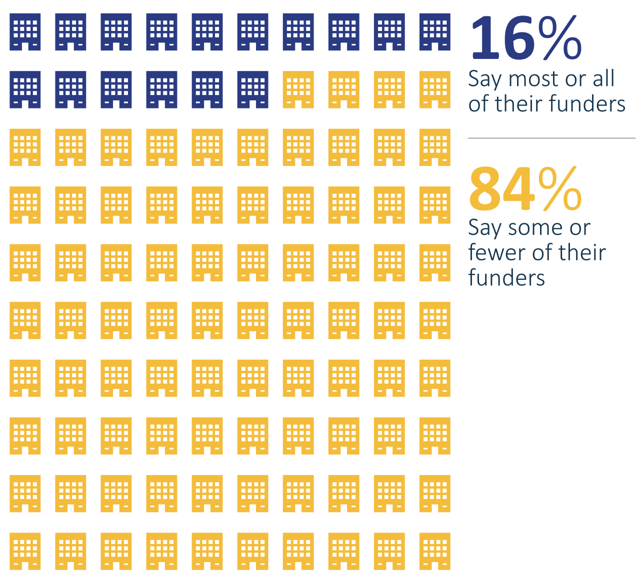
Nonprofit Leaders' Perceptions of Foundations' Priorities and Programmatic Strategies

Percentage of nonprofit Leaders

How many of a nonprofit's foundation funders have **funding priorities that reflect a deep understanding of the nonprofit's intended beneficiaries' needs**



How many of a nonprofit's foundation funders have **programmatic strategies that reflect a deep understanding of the nonprofit's intended beneficiaries' needs**



[13] Ellie Buteau, Phil Buchanan, and Ramya Gopal, "How Far Have We Come? Foundation CEOs on Progress and Impact," *The Center for Effective Philanthropy* (December 2013), http://www.effectivephilanthropy.org/wp-content/uploads/2014/01/HowFarHaveWeCome.pdf.

Nonproft Profile

Interviewee
Dominic Moulden, Resource Organizer

Location
Washington D.C.

Year established
1997

Annual expenses
$377,383

Number of staff and volunteers
6 staff and 50 volunteers

About the organization: ONE DC's mission is to create and preserve economic and racial equity in D.C. through grassroots community organizing, popular education and direction action. The organization serves Washington D.C. residents, focusing on long-time D.C. residents, particularly African-Americans and low-income residents, and has dues paying members who are engaged in building movements and some of whom are volunteers with ONE DC.

Why listen to beneficiaries? Resource Organizer Dominic Moulden says, "It's important for ONE DC, because we emphasize in our organizing model that we want to practice transformative organizing; and the way you do that is to listen to the voices of the people most impacted." ONE DC seeks input from its beneficiaries to ensure that its work reflects their issues and concerns.

How is feedback from beneficiaries collected? Through a mix of methods including canvassing in neighborhoods, asking members to provide confidential feedback through 360 degree evaluations about their experiences working with the organization's staff and volunteers, and campaign meetings. Some campaign meetings serve as listening sessions, "where we take direct feedback from our target population. We try to explain to people that it doesn't mean that we can do everything that people ask us to do, but it means that we're fully engaged in a meaningful and respectful conversation with the people impacted. And we're getting direct input and feedback from those residents," explains Moulden.

What's an example of feedback received and used? Moulden hears lots of feedback about big and small ways the organization can improve. For example, one long-time member criticized the healthiness of the food provided at evening and weekend meetings. "Most people might think that's a minor issue," says Moulden, "but with low-income people and people with a lot of children, you've got to look after that. When we first started, we always provided food and drink for residents, because we have a lot of weekend and night meetings. So now, with our resources limited and tight, sometimes we can't provide food and drink, or we might not provide the most healthy food and drinks. But it is important to us, because it's people's health."

We try to explain to people that it doesn't mean that we can do everything that people ask us to do, but it means that we're fully engaged in a meaningful and respectful conversation with the people impacted.

ONE DC's strategic direction has also been shaped by input from members. For example, during a campaign meeting on right to income issues, members raised the concern that residents often struggled to find jobs despite participating in multiple job training programs. Members asked ONE DC to help address the problem and so the organization led an eight-year organizing effort that resulted in legislation being passed to tie government workforce development efforts to placement in jobs. Moulden says "it was one of the first times in D.C. history that a training program was attached directly to the job."

How well do your foundation funders understand your organization's beneficiaries? Moulden believes that fewer foundations than before are making an effort to listen to those people they are trying to help. He says, "About 10 years ago, almost all the foundations or donors that I dealt with came out and met the members and the staff, and they walked around in the community. Most of the foundations don't do that anymore, so I don't think they understand the connection between their resources and the people. I think that's the fundamental breakdown in foundation giving, is that the foundations, too many of them, believe that they know what the answers are, rather than understanding that it should be a relationship with the people, and that the people that they fund really do have some answers."

The few foundations that have deeply understood ONE DC's intended beneficiaries have made an effort to seek input from the organization. Recalling one exemplary foundation, Moulden says its executive director "used to say that...when we submitted a proposal, or presented an issue, he wanted to hear from the people, and have the people give him guidance—and that didn't mean that he agreed to everything. It meant that we were giving the foundation guidance on what our needs are. But most of the time now, the foundations say, 'Here's what we're doing, and you've got to fit it.'"

3 Nonprofit leaders say the foundations that best understand their organizations' intended beneficiaries' needs actively engage with their organizations and their work; are humble, open, and collaborative in their approach; or are deeply connected to the issues or communities.

We asked nonprofit leaders to share what characteristics set apart the foundation funders that that they believe best understand the needs of their organization's intended beneficiaries. The top three characteristics nonprofit leaders mentioned include engaging with grantees; being humble, open, and collaborative; and developing a deep connection to the issues or communities.[14]

ENGAGING WITH GRANTEES

About one-third of nonprofit leaders say that the foundations that best understand their intended beneficiaries actively engage with their organizations. For example:

"The foundation funders who best understand our beneficiaries' needs are the ones who visit us during our programs, meet the youth served by our organization, spend time talking to them and being with them. They also stay involved with us throughout the year, and some even volunteer with our organization."

"They are in regular conversation with their funded groups and expect those conversations to include beneficiaries in, and as a central part of, those conversations."

"[These foundations] have spent time with the intended beneficiaries and have realistic expectations about what we can do to help the students."

"They call and encourage ongoing interaction with us—send articles of interest and ask a lot of questions."

"The foundations that have the greatest understanding of need spend significant time at least once a year in conversation with us to know of our challenges and our progress in serving our beneficiaries."

[14] These characteristics are not mutually exclusive; some nonprofit respondents mentioned multiple characteristics.

Nonprofit leaders brought up the different ways exemplary foundations engage with their organizations and their work: 14 percent cite funders' willingness to take the time to learn about the work of the nonprofit, 11 percent discuss site visits, nine percent mention the frequency or responsiveness of communication they have with foundations, and seven percent mention foundations' communication with the nonprofit's beneficiaries.

> While [foundations] have much to teach us, we also have much to teach them. The best funders realize that.

FOUNDATIONS' APPROACHES

Of the nonprofit leaders surveyed, 20 percent say that the way foundation funders approach their work sets them apart from funders who understand beneficiaries less well. These respondents say that the best funders approach their work with a sense of humility, openness to the ideas of grantees, and a sense of partnership with grantees. Nonprofit leaders make comments like:

"Some funders seem to come into the relationship thinking that they know more than we do. Funders do probably spend more time reading academic literature, but they don't spend time with low-income people. While they have much to teach us, we also have much to teach them. The best funders realize that."

"They are flexible and caring and want to learn from failures instead of being critical."

"They form a true partnership with us....They truly care not just about the program they are funding but about the entire organization, and they want us to succeed."

"They are not driven by what they can control or the outcomes they expect. Instead they are driven by the need to support capacity-building efforts for citizens so that they can become empowered to find their own solutions."

"They have experienced staff who know the limitations of their own expertise and seek to enhance that with input from those who have content expertise."

"[They have] a demonstrated deep compatibility around the needs of our constituents and a desire to learn alongside our organization how best to serve these people, especially those who are chronically underserved."

CONNECTING TO THE ISSUES AND COMMUNITIES

About 20 percent of nonprofit leaders cite funders' connection to the contextual issues facing beneficiaries and the community that nonprofits are working with—developed through research, relationships with those working on or facing those issues, or personal experience. As one nonprofit leader says, "[The best] foundations have consistent program officers who are knowledgeable about specific needs in our community and understand early-developmental issues."

Nonprofit leaders provide examples of how some of their best foundation funders develop this connection:

"They conduct thorough community needs assessments. They talk to stakeholders. They are aware of the most pressing community needs."

"They do environmental scans and research reports to gather information to inform setting funding priorities."

"Funders who are actively engaged in real-life experiences with the various organizations working with the beneficiaries are most effective."

"Some funders serve on larger coalitions that address social issues in our community and state. This helps them learn of the issues when they aren't considering funding for a specific request."

While our data suggest that most nonprofits receiving funding from foundations see these foundations as out of touch with intended beneficiaries, we also see from the comments above that it is possible to break this mold. Survey respondents eloquently describe the characteristics of those foundation funders that have stood out for their understanding of nonprofits' beneficiaries.

Nonproft Profile

Lifetrack
Putting Hope Within Reach

Interviewee
TrixieAnn Golberg, President/CEO

Location
St. Paul, MN

Year established
1948

Annual expenses
$9,387,485

Number of staff and volunteers
145 staff and more than 200 volunteers

About the organization: Lifetrack provides services that support employment and economic opportunity and child and family healthy development to children, families and adults facing critical life challenges. The organization serves a variety of beneficiaries including individuals and families in significant poverty, legal immigrants and refugees, and individuals and families with disabilities and mental illness.

Why listen to beneficiaries? Since Lifetrack works with beneficiaries facing a range of challenges, understanding their unique experiences and needs is necessary for the organization to effectively help them. CEO TrixieAnn Golberg says, "[Collecting feedback] is very much a natural part of how we work with individuals. It is about documenting the effectiveness of our programs, constantly looking for areas of improvement, both in the quality of the services provided, as well as other opportunities to meet families' needs."

How is feedback from beneficiaries collected? Lifetrack uses a combination of surveys—paper and online—interviews, focus groups, anonymous suggestion boxes and third-party evaluations, when possible. While families can provide feedback to the organization through any of these channels, Golberg finds that "most of the feedback comes through interviews and conversations, and end-of-year or mid-year check-ins with parents. Our staff spends a lot of time in an appreciative inquiry-type process, and so learning the art of interaction and inquiry with our clients is an important part of how our staff interacts with clients."

What's an example of feedback received and used? The organization recently fielded a survey to employment services participants to learn about their preferred method of interacting with their employment counselor. The results surprised Golberg. "We had assumed that a younger client would be more likely to use technology and have face-to-face interactions as secondary. It was exactly the opposite. Younger clients preferred the face-to-face and older clients preferred the use of technology and phone check-ins. So we put this information to use immediately, by changing our protocol, the number of engagements, and the type of engagements with our job-seekers…I think we're now able to make sure that we're interacting with each client in the way that's most effective for them."

> [Collecting feedback] is very much a natural part of how we work with individuals.

Why is it important for your foundation funders to understand your organization's beneficiaries? Golberg believes that for foundations "to make effective funding decisions, [they] have to be able to understand both the theoretical environment, as well as the real-world environment of individuals, who, for instance, are trapped in poverty."

When foundations have a deep understanding of those they aim to serve, Golberg says, "I think it allows us to present proposals to them that are most aligned with their interests, which then means the whole process is more efficient and effective."

What are some examples of foundations that have had a deep understanding of your organization's beneficiaries? Two of Lifetrack's foundation funders, in particular, have made an effort to develop a deep understanding of the needs and experiences of its families. Golberg says one foundation "does a really great job of both doing their own independent research, and understanding the economic conditions of Minneapolis-St. Paul, and issues impacting individuals in poverty. They listen, they ask. They're really pro-active, and want to hear about our first-hand experience with clients. They want to gather meaningful information. And I think it helps them to make really good, strategic decisions about how they apply resources, and at what point they apply resources."

The other foundation "has been part of a benchmarking project going on in the employment services area, where similarly, I think they're trying to get very close to the work, to understand where are the best practices, and how to not only identify best practices, but then to move the entire sector along towards implementing and being more effective," says Golberg.

However, the power dynamic between foundations and nonprofits can sometimes inhibit such open two-way communication. "Sometimes the funded organization may not always feel comfortable sharing their expertise as to not want to appear to be unsupportive of the foundation's perspective," says Golberg. "Foundations that are good at recognizing and bringing out the expertise within their funded organizations and identifying where they can enhance it are the foundations that can have a lasting impact on the field."

CONCLUSION

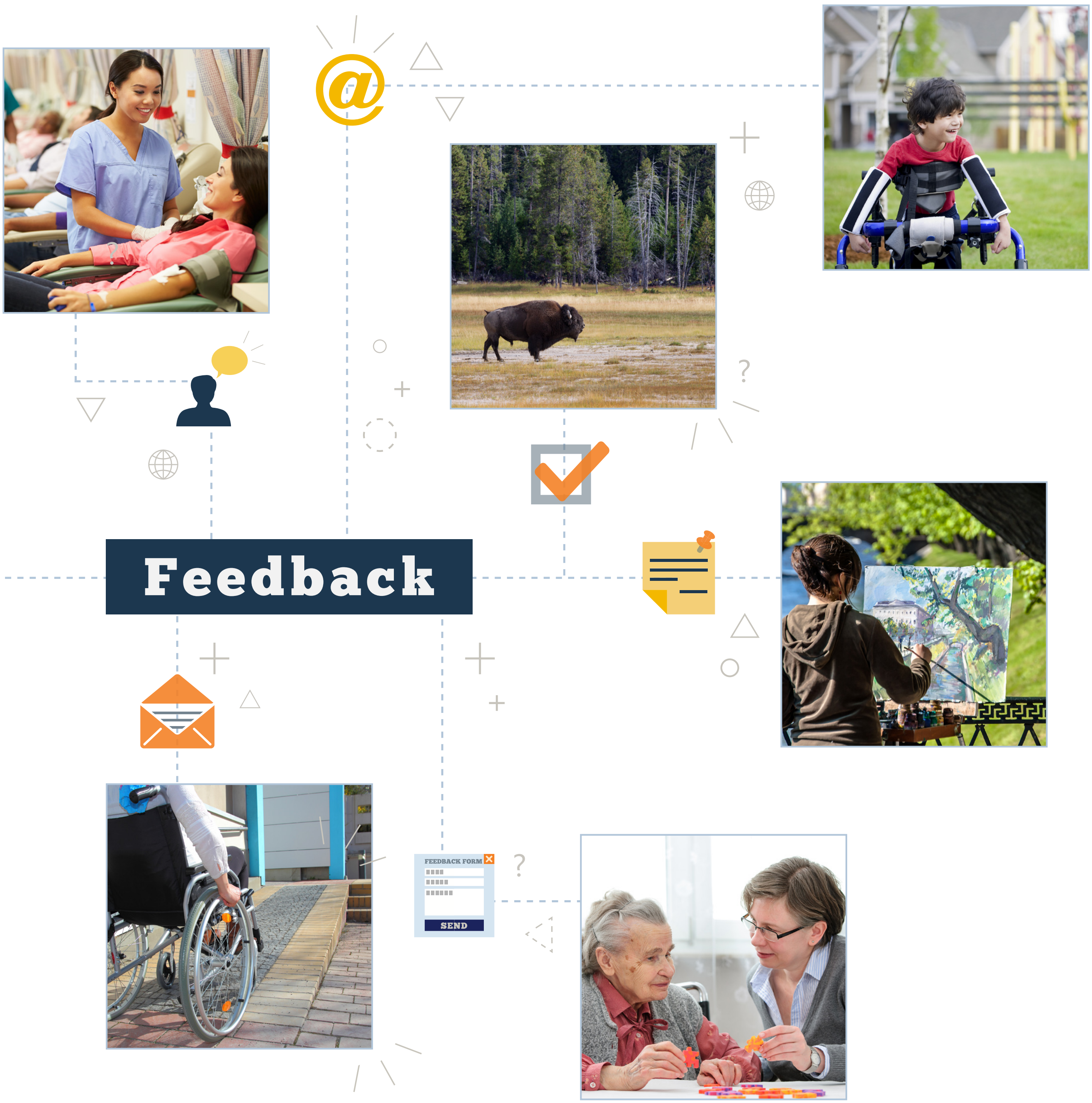
Despite the belief of some critics that nonprofits are not paying attention to those they serve, our survey of nonprofit leaders suggests otherwise: Virtually all nonprofits are seeking feedback from their beneficiaries about their programs and services and are using that feedback to improve their work. Our data are based on self-reporting, of course, but suggest that nonprofits of the type represented on our panel—those receiving foundation funding—are working hard to hear from their beneficiaries and make improvements based on what they learn. Our data suggest nonprofits are doing this despite resource constraints that make it a challenge.

We cannot generalize about the quality of the surveys and other methods nonprofits use to gather beneficiary feedback, although we have included some examples of how nonprofits collect and use feedback throughout the report. We do know that nonprofits themselves are doing the work of hearing from beneficiaries more often than using third parties to do so, which may limit the candor and utility of the feedback they receive. There are an increasing number of organizations and initiatives—such as Keystone Accountability and Feedback Labs—trying to help nonprofits improve their ability to collect feedback from beneficiaries. There may also be opportunities for foundations to do more to support their grantees in these efforts.

Our data suggest that nonprofits believe that foundations could benefit from deeper engagement with beneficiary feedback. More than half of nonprofit leaders believe that only some or few of their foundation funders have a deep understanding of their intended beneficiaries. Foundation leaders do not see it this way: In CEP's 2013 survey of foundation CEOs, more than 80 percent said that limited foundation staff understanding of the foundation's ultimate beneficiaries was *not* a barrier to the foundation's ability to make progress.[15] Yet nonprofit leaders say foundations' funding priorities and programmatic strategies often do not reflect the true needs of those foundations are trying to serve.

But grantees believe there are ways for foundations to do this work well. Nonprofit leaders say that the foundations that best understand their intended beneficiaries' needs make an effort to engage grantees and learn about their work, approach their work with humility, openness and a spirit of collaboration, and find ways to stay connected to the larger contextual issues. Our findings suggest that grantees think foundations could benefit from reflecting on the way they develop their understanding of those they ultimately seek to help and how they incorporate this understanding into their grantmaking priorities and strategies.

[15] Buteau, "How Far Have We Come," 25, http://www.effectivephilanthropy.org/wp-content/uploads/2014/01/HowFarHaveWeCome.pdf.


Feedback
FEEDBACK FORM
SEND

QUESTIONS FOR REFLECTION

What do you and your colleagues do to develop your understanding of the experiences and needs of those your foundation ultimately seeks to help?

How much do you and your colleagues discuss with grantees the needs of their beneficiaries?

Do grantees share with you, and your colleagues, feedback they have collected from their beneficiaries?

How much do you and your colleagues discuss that feedback with grantees?

How do you use the feedback from beneficiaries that grantees share with you?

Do you and your colleagues communicate or interact with the foundation's intended beneficiaries?

What is an example of something you or your colleagues have learned from your foundation's intended beneficiaries directly—or from grantees about their beneficiaries? What was changed on the basis of that learning?

How does your foundation assess how well its staff understand the needs of those it ultimately seeks to help?

How does your foundation assess whether its priorities and its programmatic strategies reflect the needs of those it ultimately seeks to help?

To what extent is input from grantees and intended beneficiaries sought when developing funding priorities? Programmatic strategies?

Does your foundation provide grant support to its grantees to collect beneficiary feedback? Does your foundation provide nonmonetary support to its grantees to help them in their efforts to collect or interpret beneficiary feedback?

For how many of its grantees does your foundation provide this support?

How does your foundation decide which grantees will receive this support?

APPENDIX: METHODOLOGY

Data for this report were collected through *The Grantee Voice: Feedback for Foundations*, CEP's panel of nonprofit leaders.

PANEL

The Grantee Voice: Feedback for Foundations panel was established in the initial months of 2013. Several steps were taken to create this survey panel. First, a database from the National Center for Charitable Statistics, which consisted of information from more than 367,000 registered 501(c)(3) organizations with a Form 990 filed between 2008 and 2011, was obtained. Using this data, CEP randomly selected nonprofits, excluding hospitals and universities, with annual expenses between $100,000 and $100 million. To ensure that the randomly selected sample was representative of this full range of expenses, a stratified sample containing 25 percent of nonprofits from each quartile of this expense range was created. The Foundation Center's Foundation Directory Online was used to determine whether or not each of the nonprofits in this random sample had received any funding since 2009 from independent, community, or health-conversion foundations giving at least $5 million annually in grants.[16] Only leaders of nonprofits that had received such funding were invited to join the panel. The steps in this process were repeated until we reached a sample of approximately 2,000 nonprofits.

Ultimately, 1,882 nonprofit leaders were invited to join *The Grantee Voice: Feedback for Foundations* panel, and 514 accepted the invitation, resulting in an acceptance rate of 27 percent. We statistically tested for and saw no differences in the locations of the organizations that did and did not accept the invitation to join this panel. However, the annual expenses and issue areas of the organizations for these two groups differed slightly.[17]

For this panel, we use the word "leader" to refer to the individual who is responsible for running the nonprofit organization, typically referred to as the executive director, president, or CEO.

SURVEY SAMPLE

During the course of the 2013 surveying process, nine nonprofit leaders left their organizations. We invited the new leaders of these organizations to represent their organizations on the panel and three of them accepted. In addition, one nonprofit leader was removed because he no longer wanted to participate. As a result, a survey on beneficiary feedback was sent to the 507 nonprofit leaders who comprised *The Grantee Voice* panel in November 2013. Completed surveys were received from 235 leaders, for a response rate of 46 percent.

Nonprofits represented by leaders who responded to the survey did not differ from nonrespondent organizations by annual expenses, issue area, or location of the nonprofit. They also did not differ by the proportion of revenues coming in the form of foundation funding or the number of foundations funding the nonprofit. The staff sizes differed slightly between these two groups.[18] Statistics on staff size, proportion of revenues coming in the form of foundation funding, and number of foundation funders are based on self-reported data collected in May 2013, when the nonprofits accepted the invitation to join the panel.

METHOD

The survey was fielded online. Panel participants were sent a brief e-mail including a description of the survey, a statement of confidentiality, and a link to the survey. Six reminder e-mails were sent to panel participants who had not yet responded to the survey.

The survey consisted of 21 questions. These questions covered the degree to which nonprofits understand

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[16] We excluded nonprofits that only received funding from a community foundation because we could not tell whether these nonprofits were receiving funding from a donor-advised fund or the foundation itself.

[17] A chi-square analysis of expense quartiles was conducted, and a statistically significant difference of a small effect size was found. Nonprofits with annual expenses between $1.6 million and $5.1 million were slightly more likely to accept the invitation to join the panel, and nonprofits with annual expenses of $5.1 million or more were slightly less likely to accept the invitation to join the panel. A chi-square analysis of issue areas was conducted based on organizations' issue area codes created by the National Center for Charitable Statistics. A statistically significant difference of a small effect size was found between organizations that focused on the environment and organizations that focused on all other issue areas; nonprofits in the environment issue area were slightly more likely to accept the invitation to join this panel. A statistically significant difference of less than a small effect size was found between organizations that focused on education and organizations that focused on all other issue areas: Nonprofits focused on education were slightly less likely to accept the invitation than organizations focused on all other issue areas.

[18] A chi-square analysis of staff size quartiles was conducted. A statistically significant difference of a small effect size was found. Nonprofits with staff sizes between 14.5 and 41 staff members were slightly more likely to respond to the survey than nonprofits with staff sizes between 5 and 14 members and 42 members or more, respectively.

the needs of their beneficiaries, nonprofits' patterns of collecting and using feedback from beneficiaries, nonprofits' perspectives on how many of their foundation funders understand the needs of their beneficiaries, whether nonprofits are being supported by foundations in their efforts to collect beneficiary feedback, and nonprofits' patterns of sharing beneficiary feedback with their foundation funders.

QUANTITATIVE ANALYSES

To analyze the quantitative survey data from nonprofit leaders, descriptive statistics were examined and a combination of correlations, independent sample t-tests, chi-square analyses, and analysis of variance tests were conducted. An alpha level of 0.05 was used to determine statistical significance for all statistical testing conducted for this research. Effect sizes were examined for all analyses. Only findings reaching at least a medium effect size are discussed in this publication.[19]

QUALITATIVE ANALYSIS

Thematic and content analyses were conducted on the responses to the following three open-ended survey items:

1. Please state as specifically as possible who or what are the primary intended beneficiaries of your organization's services and/or programs (e.g., high school students, elderly people in the community, stray dogs and cats, trainees in workforce programs, etc.).

2. Please provide a brief example of how your organization has used the feedback collected about beneficiaries' experiences with your organization's services and/or programs to improve those services and/or programs.

3. Thinking about your foundation funders that best understand your intended beneficiaries' needs, what is it about the way those foundations do their work that sets them apart from other foundations?

A coding scheme was developed for each open-ended item by reading through all responses to recognize recurring ideas, creating categories, and then coding each respondent's ideas according to the categories. In coding responses to the first open-ended question, the codes were categorized only by group of beneficiaries.

A codebook was created to ensure that different coders would be coding for the same concepts rather than their individual interpretations of the concepts. One coder coded all responses to the question and a second coder coded 15 percent of those responses. At least an 80 percent level of inter-rater agreement was achieved for each code for each open-ended item.

Selected quotations were included in this publication. These quotations were selected to be representative of the themes seen in the data.

INTERVIEWS FOR NONPROFIT PROFILES

Interviews with nonprofit leaders were conducted to highlight ways that different nonprofits are collecting and using feedback from their beneficiaries. The nonprofit leaders profiled were randomly selected from those who had reported in their survey responses that their organization collects beneficiary feedback through at least five methods, uses beneficiary feedback to a great or extreme extent to improve its work, and understands its beneficiaries extremely well.

All interviews were conducted via phone and lasted a half-hour. The interviews were recorded and transcribed. Each nonprofit leader interviewed reviewed the profile about his/her organization and permitted it to be published as part of this research.

[19] See Jacob Cohen, "A Power Primer," *Psychology Bulletin*, 112, no. 1 (1992): 155–159.

NOTES

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$100,000 TO $199,999

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