AN INITIATIVE OF
FUND FOR SHARED INSIGHT
Listen4Good

Listen4Good Q & A

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PARTICIPATION REQUIREMENTS

1. What are the criteria and requirements for organizations to participate in Listen4Good?

The threshold and additional criteria are as follows:

Threshold Criteria

- *For co-funded grant program participants only*: Applicants must be nominated by a current or new funder who supports their participation, and who agrees to contribute $15,000 to Fund for Shared Insight's Listen4Good initiative in support of the grant.
- Applicants must be a 501(c)(3) public charity based in the United States, including all territories, states, and the District of Columbia, and it must serve domestic clients.
- Co-funded grant program applicants must have a minimum annual budget of $500,000 in the current and previous fiscal years; *for Listen4Good Online+ applicants*, the minimum is $300,000 annually.
- Applicants must serve a minimum of 100 unique clients annually, and be able to survey a minimum of 50 respondents at minimum two times per year.
- Applicants must serve, and plan to implement feedback loops with, clients whose voices are least heard. (See Question 5.)

Additional Selection Criteria and Expectations

- Organization demonstrates commitment to design and implementation of high quality feedback loops, defined as:
  - Data are collected regularly (at least 2x/year, ideally more often);
  - Organization receives at least 50 survey responses and/or a substantial response rate
  - Data are used to inform organizational practice and programmatic changes; and
  - Staff close the loop with those who provided feedback (how this is done will vary by organization).
- Organization embraces use of the L4G semi-standard question set; participates in coach / support offerings provided through L4G; contributes anonymized data to benchmarks; and for co-funded program: shares data and lessons with Fund for Shared Insight and its nominating funder.
- Organization's leadership team demonstrates commitment to engaging in the downstream activities associated with implementing high-quality feedback loops, including:
  - Using the data for ongoing improvement
  - Communicating and advocating the value of client feedback to staff and other stakeholders
  - Dealing with hard situations that could arise from receiving or responding to feedback
  - Closing the loop with those who provided feedback
- Organization has sufficient capacity to execute on the project, participate in Listen4Good coaching as appropriate, and provide limited feedback to L4G as needed.

2. Why do you require organizations serve a minimum of 100 clients annually?

We have tried to keep the requirements as broad and flexible as possible in terms of nonprofit size, location(s), issue areas, and so forth. That said, we felt we needed to establish a minimum number of clients served as a proxy for organizational size and readiness to participate in Listen4Good, and we determined that 100 unique clients served annually is a reasonable minimum.

CONTEXT AND DEFINITIONS

3. What is your definition of a "high-quality feedback loop"? Does it have to be tied to individual clients or can it be anonymous?

We define a high-quality feedback loop as one in which data is collected regularly; the loop is closed with those who provided feedback; data are used to inform practice; and benchmarks are created to put the data in context.

The feedback/feedback loop is preferably anonymous, but we recognize the need to collect identifiable data in some cases. Some organizations may shift over time from anonymous to non-anonymous feedback loops.

4. What do you mean by 'the people we seek to help'?

People use a variety of terminology to describe the people we seek to help, including "beneficiaries," "clients," "ultimate constituents," and "ultimate intended constituents." For the purpose of mutual understanding in the work of Fund for Shared Insight, we primarily use the phrase "the people we seek to help," recognizing that we don't always reach the people we *want* to help.

Individuals from whom feedback will be collected must be the ultimate intended client receiving services and represent individuals whose voices are least heard. For example, these might be families visiting food pantries, youth attending afterschool academic and enrichment programs, residents living in public housing, recent immigrants using legal-aid services, or individuals participating in job-training programs. Ultimate clients as defined here are <u>not</u> teachers, nurses, social entrepreneurs, or others whom we would consider "intermediaries" to the people we ultimately seek to help.

5. How do you define "voices least heard"?

Since our founding, Fund for Shared Insight has focused on listening to the voices least heard in order to improve nonprofit and philanthropic practice and, ultimately, improve lives and communities. The phrase "voices least heard" has dual meaning for us.

First, it refers to people whom nonprofits and foundations seek to help, such as families accessing food pantries or free clinics, youth attending afterschool enrichment programs, residents living in public housing, recent immigrants using legal-aid services, or individuals participating in job-training programs. This definition typically excludes intermediaries, such as teachers, volunteers, social entrepreneurs, or others who might help manage, shape, run, or deliver nonprofit programs and services.

Secondly, "voices least heard" refers to people who are the least heard in our broader society due to historic inequality and enduring structural barriers. While nonprofits and foundations should listen to all participants and intended clients, Shared Insight further prioritizes marginalized groups. This definition includes people of color, people with disabilities, LGBTQ people, people living in poverty, and, depending on the context, others, such as people in rural communities, where structural conditions have isolated or excluded their voice. We understand that these definitions are complex and evolving, and that our thinking will continue to evolve in service to our overarching goal of better listening as a vehicle to positive and just social change.

6. What is the Net Promoter System^{SM} or NPS®?

In order to expand the practice of high-quality feedback loops, we researched what options might be *simple* enough for the majority of nonprofits to implement and *standardized* enough to begin to create some meaningful benchmarks. A promising idea came from the business sector, where there is considerable experience in soliciting customer feedback in the form of the Net Promoter System^{SM} (NPS®), a concept originally created by Bain & Company. NPS is framed around the idea of asking customers if, based on their experience, they would recommend a service to someone in a similar position. The standard NPS question specifically asks: **"How likely are you to recommend [x company, program, product or service] to a friend or family member?" on a 0 to 10-point scale,** and is followed up by a qualitative question: "What is the reason for your score?" Many companies also add, "How can we improve?" or "What are our biggest strengths and weaknesses?"

An organization's NPS score is calculated by taking the percentage of promoters (those who answer a 9 or 10 on the question) less the percentage of detractors (those who answer 0 to 6). Active users of NPS typically examine feedback in each category, conduct root-cause analysis to understand the reasons behind the detractor experiences in particular, and "close the loop" with customers so they know the organization heard them. NPS scores can be transactional (about a specific interaction or product) or relational (about the overall experience of an organization or product). Both kinds of scores help organizations better understand the perceptions and feedback of the people we seek to help.

7. Has NPS been used with nonprofit clients and/or other stakeholders in the nonprofit sector? It sounds like NPS is about customer loyalty and promotion of a brand or product, and that isn't really our goal in our nonprofit work, so how is NPS relevant to our context?

NPS is increasingly being used by nonprofits to gather feedback from stakeholders, such as donors, volunteers, and members, and some nonprofits are experimenting with using NPS with constituents/clients – the exact practice Listen4Good is promoting. Given the relative success of NPS across other sectors, especially with its ability to easily capture feedback data (quantitative and qualitative) and build benchmarks to put the data in context, Fund for Shared Insight has developed and tested NPS as one method for nonprofits to gather feedback from those they are seeking to help.

L4G builds on the spirit of NPS to expand and strengthen constituent feedback loops in the social sector. We recognize that this is not the perfect question but it is a powerful way to advance the conversation. Of course, while businesses inherently want customer referrals or customers promoting their brand/service/product, nonprofits are not typically looking for the same thing. But even if the goal isn't to turn clients into promoters or to achieve high customer loyalty, we believe that the rigor of asking standard questions, the practice of using data, and the feedback-process experience it provides are valuable tools for nonprofits seeking to hear from those who are least heard. In addition, NPS is one of a number of standard questions in the L4G question set.

8. What are benchmarks and why do they matter? How will you create them in this initiative?

Benchmarks provide the opportunity to put data in context – a benchmark is a comparative data point or data points that provide interpretive value. For example, let's say you survey your clients and get a Net Promoter Score of 50. Then you might ask, "Is that a good score, an average score or a low score?" Well, it really all depends on the context or comparative data – that is the benchmark.

A benchmark can come from a few sources including: (1) your own organization's history – you can benchmark current against past performance; (2) your own organization's work across multiple sites – you can benchmark across multiple sites at a single moment in time and over time as well; and (3) a dataset of other similar organizations. By requiring participants to use a semi-standardized survey tool, Listen4Good is creating the opportunity for organizations to build and use all three types of benchmarks. A dataset that allows organizations to compare themselves to other groups has been the most elusive to date, but L4G is making it happen. We have benchmarks in issue areas, including basic and emergency services, community and economic development, education, employment, family services, and youth development.

9. How is this feedback different from typical client-satisfaction surveys? And what is perceptual feedback?

In many ways, it is analogous. However, we would argue that the NPS framework and our related question set are more actionable than traditional customer-satisfaction surveys. For example, you can segment respondents based on respondents that identify as "promoters" versus "detractors", and use the qualitative feedback from both groups to determine what's going well within your organization and what needs improvement.

Simply put, perceptual feedback refers to the perspectives, feelings, and opinions individuals have about their experiences with an organization, product, or service that are used to inform and improve the practice and decision-making of that organization. Perceptual feedback captures sentiments of both the head and the heart, gathering information about what individuals did; whether an interaction met their personal standards; and how that interaction made them feel (e.g. supported, respected, or delighted). To read more about perceptual feedback, please reference "Perceptual Feedback: What's it all about?"

DESIGN AND IMPLEMENTATION

10. What questions are we required to ask as part of Listen4Good and what questions canwe customize?

The core feedback tool is simple, consisting of five standard questions that all participating organizations are required to ask:

- 1. How likely is it that you would recommend […] to a friend or family member? [On a scale of 0 – 10]
- 2. What is […] good at? (Open-ended response)
- 3. What could […] do better? (Open-ended response)
- 4. How well has […] met your needs? (Close-ended, 5 point scale)
- 5. How often do staff at […] treat you with respect? (Close-ended, 5 point scale)

In addition, organizations should ask demographic questions and add five to seven custom questions to their survey. Listen4Good has a bank of custom questions that nonprofits have asked in the past to support you in the development of your own custom questions.

11. Can we ever survey other constituent groups under Listen4Good?

Important constituents, such as volunteers, partners, donors, and staff are NOT ultimate intended clients under L4G's definition, and thus surveying those populations would not meet the initial participation criteria of Listen4Good. That said, once you have completed at least one full feedback loop with ultimate intended clients, you may survey others in additional feedback rounds. If you are interested, we have survey templates for volunteers, partners, and staff. We do not currently have a template for surveying donors.

12. What if the people we seek to help can't answer easily answer your required survey questions (e.g., people with disabilities, verbal-only communication)?

There are several ways to adapt the Listen4Good survey tool for different populations. Interview methods are a common adaptation and we also offer a simplified survey, which includes fewer answer options and pictographs rather than words. If your population requires adaptations, please contact Listen4Good.

13. Organizations must serve at least 100 clients annually. Is there a minimum number of clients that must be surveyed? Is there a minimum response rate?

Our goal is for you to receive a minimum of 50 survey responses, but ideally many more than that. Without at least 50 respondents, you will not be able to easily segment your data for analysis and you are better off conducting focus groups or interviews instead. At its core, Listen4Good offers a survey tool which is appropriate for a certain volume of clients served. We do not have a minimum required response rates, but we typically see response rates that range from 15-25% for offsite methods (e.g., email, text) to 60-80% for onsite methods (e.g., client fills out a survey immediately after receiving a service). Coaches can provide strategies for organizations struggling with response rates.

14. What languages are available if we need translations?

Listen4Good's SurveyMonkey platform can support 55 different languages. For three of those languages — Spanish, Chinese (traditional), and Vietnamese — the standard Listen4Good survey questions are already translated. For all custom questions and for all questions in the other languages, you will need to provide your own translations. The L4G team and web app will support those efforts. If you would like to implement the survey in a language that is not one of the 55 supported on SurveyMonkey, the survey will need to be done offline (e.g., on paper, via phone) with the data then manually entered into SurveyMonkey.

15. What ages are appropriate for the Listen4Good survey? Can I survey youth?

Our standard Listen4Good survey is appropriate for most youth ages 13-18, or those reading at a 5th grade level at minimum. For youth ages 7-12, we have a set of simplified survey questions that are available for use, but are not incorporated into our web app. In addition, surveys will need to be administered via paper as SurveyMonkey's policies dictate that youth under 13 taking digital surveys must be accompanied by a parent/guardian. See SurveyMonkey's Privacy Policy on the Safety of Minors. We do not recommend surveying youth under the age of 7. An alternative method is to survey parents or caregivers as a proxy for youth under age 13.

16. What methods do you support to gather data? Do you support text?

We support data gathering through a variety of methods. They include paper, interviews (phone or in-person), email, text, tablets, or computer. Regardless of how the data is gathered, it will all eventually be entered into SurveyMonkey for analysis. Paper surveys will need to be manually inputted by organization staff or volunteers, while email surveys, for example, will already be entered by the respondent. Please note that for text, respondents will click on a link to answer the survey in a web browser on their phone.

17. What if we use another platform other than SurveyMonkey to collect data now, do we have to switch platforms to participate in Listen4Good?

Yes, all data collection Listen4Good needs to go through the SurveyMonkey platform. The Listen4Good web app is integrated with SurveyMonkey and you will need to use SurveyMonkey in order to access and contribute to the L4G benchmarks (e.g., the ability to compare your survey results to similar L4G organizations). With that said, we have some limited flexibility if you would like to integrate your survey results with Salesforce while also leveraging SurveyMonkey. Please contact L4G to discuss further.

18. What if we already have a SurveyMonkey account? Do we need to get a new one? And what happens to the account after Listen4Good is over?

Even if you already have a SurveyMonkey, you will get a new one as part of Listen4Good. This is because your Listen4Good account will allow you to access benchmarks and our standard L4G question set. After your engagement with us is over, you can close your L4G SurveyMonkey account and export your surveys to your pre-existing SurveyMonkey account. If you did not have a pre-existing SurveyMonkey account, you will be invited to set up one after our engagement and export your survey information to it.

19. How do you suggest we staff the project? How much staff time do you expect the project to take?

At minimum, organizations should plan to have two individuals involved in the project: a senior leader and a project manager. The project manager (which could be more than one person) will implement feedback loops in conjunction with other staff. It would be helpful for this person to have project management and analysis skills, though the Listen4Good coaches can also provide support. *For organizations in the co-funded grant program*, the senior leader will participate in the introductory call and a reflection call at the end of the first feedback loop. This is to ensure broader organizational commitment and decision-making authority in responding to feedback. *For organizations participating in L4G Online+,* senior leaders should provide organizational commitment to the project by dedicating resources and staff time to implement and respond to feedback.

Staff time will vary depending on the complexity of implementation, which varies by organization.

20. What training and support will we get as part of Listen4Good? When and how do we engage with coaches?

All organizations participating in Listen4Good get paid access to a premium SurveyMonkey account and unlimited access to an interactive web app offering a rich array of materials — Including step-by-step guides, video tutorials, and peer resources — to guide them through the L4G process. You will also have access to our online peer-exchange platform, L4G Community, to ask and answer questions from other participating organizations. There's a standard online helpdesk for your technical needs and our staff will field questions, as needed, during virtual office hours.

In addition, Fund for Shared Insight has a team of L4G coaches who provide comprehensive orientation and support at threshold moments in the process. The team is staffed with consultants who have specific expertise in survey design and analysis of constituent feedback.

Participants in the co-funded grant program will be assigned a dedicated coach who will be your one-on-one guide throughout the entire process. The coach will reach out to you to provide assistance at these key moments:

- As an Introduction to better understand your organization's feedback goals and timelines
- To help you draft and finalize your survey questions and determine how to implement your survey. (Steps 1 -2)
- To review your survey results and discuss how to respond to the feedback you received (Steps 3-4)
- To review how closing the loop and the first feedback process went, and to plan for the next feedback round (Step 5)

You are also welcome to contact your coach at any point for assistance via phone or email as needed.

Participants in Listen4Good Online+ will have access to much more limited one-on-one coaching, roughly about three hours in all, especially encouraged during the steps in the process when you are getting started and doing survey design; reflecting on feedback results; and planning for your next feedback cycle.

21. We have multiple programs from which we would like to get feedback. Should we focus only on one program for the application or could we address multiple programs?

You can start with either one program or multiple programs. We usually recommend starting with one program, learning from that initial feedback loop, and then expanding to other programs based on your experience with the first program.

22. Will we be expected to share our data with any funders? Who sees our data?

You are not required to share any data with your funder but we do encourage you to have conversations with your co-funder or sponsoring funder about what you learned through the feedback process. In terms of data access, Listen4Good central staff and coaches will have access to respondent data throughout the project, but will not share this data with anyone outside of L4G staff. No funders, including those affiliated with Fund for Shared Insight, can see individual organizational data, unless the organization chooses to share it.

PROPOSAL/APPLICATION PROCESS

23. Do you anticipate that a similar RFP open to NGOs working internationally will be available in the future?

Listen4Good is available to all public charities based in the United States, including all territories, states, and the District of Columbia. We are working to open up L4G internationally and already have partnerships with L4G-implmkenting organizations in Asia and Australia.

24. In Listen4Good's co-funded grant program, would you consider awarding grants to a collaborative of nonprofits? Would you consider funding a work group composed of more than one organization (assuming there is one lead agency)?

We have not yet received a proposal from a group of nonprofits, though we've spoken with collective-impact initiatives and can see there might be value in groups working together, especially in our co-funded program. Such an initiative might get some efficiencies and produce better sets of comparative data about a population. But before jumping into a collaborative, think about what would be reasonable. Would you collect feedback with one Listen4Good grant or would you need multiple grants? If you needed multiple grants, would your nominating funder contribute to more than one L4G grant or would you look for multiple funders? All these scenarios could work, and, in fact, we have been very clear with funders that, just as nonprofits can work together to apply, funders can work together to nominate. For example, two (or more) funders together could contribute the $15,000 matching funds for one grantee.

25. What are common reasons for rejecting an application / turning down a proposal?

Organizations are rejected if they do not meet the stated criteria. Organizations may also be rejected if their commitment to the project and/or their capacity to implement the project is low.

NOMINATIONS, CO-FUNDERS (FOR LISTEN4GOOD'S CO-FUNDED GRANT PROGRAM)

26. How does the co-funding of Listen4Good work?

One key goal of Listen4Good, and of Fund for Shared Insight more broadly, is to engage the philanthropic funding community in supporting, using, and valuing client feedback. To participate in Listen4Good's co-funded grant program, a funder must nominate a nonprofit – and if the nonprofit is selected, then that funder agrees to contribute $15,000 of the $30,000 grant total to Shared Insight.

A central (and we think exciting!) aspect of this co-funding opportunity is that it enables funders and nonprofits to meaningfully connect as they work to build or improve feedback loops with the people they seek to help.

Nonprofit, please note: Do not apply before you have secured a co- funding partner.

27. Can the nominating co-funder be a former funder of our organization (not a current one), knowing that they have to fund their portion of this grant? Or can it be a new funder that hasn't funded us before?

We have a strong preference and priority for nonprofits nominated by *current* funders. That said, we don't want to stifle interest and so it's not out of the question for a past funder or a new funder to nominate.

We want survey data from clients to be used by funders to inform their work as well, and we think that is most likely to happen for a current funder of an organization. So, if past funders nominate a nonprofit, we would contact the funders to ask why they are not a current funder and about their interest in and commitment to using the feedback from clients to inform their work. If it were a new funder nominating, we would also want to understand their interest and commitment to this work and to the data that will be collected from clients.

28. Can an individual donor fund the match or does it need to come from a foundation funder?

The nominating co-funder can be a private foundation, community foundation, corporate funder, or individual donor. As long as the funder/donor has an interest in using feedback from the people you (and they) seek to help, then we would welcome their participation as a nominator and co-funder.

29. Can you explain how funders officially nominate an organization to participate in the co-funded grant program? What documentation is required as evidence of the $15,000 funder support?

All funders need to do is tell the organization they are nominating that they agree to support the nomination and co-funding portion of the grant. The organization will then apply and state the name of nominating funder (organization and contact person/info) on the proposal cover sheet. We will contact the listed funders to confirm that they did in fact nominate the organization and learn more about why they are interested in feedback collection and how it might inform their work. In some cases, we will already have talked to the funder and/or have known to expect the nominated proposal. In other cases, we may not know of the funders or their interest until we receive a proposal from an organization they nominated.

30. Who makes the grant to participants in the co-funded grant program? Will we receive two grants, one from the co-funder and one from Fund for Shared Insight?

The co-funder makes a grant for $15,000 to Rockefeller Philanthropy Advisors (RPA), as Fund for Shared Insight is a sponsored project of RPA. This amount is matched by $15,000 from Shared Insight's core funders. RPA will then make a single grant of $20,000 to the funded organization in the first year and, subject to progress on the first year and reporting, RPA will then make a second grant of $10,000 in the final six months.

31. How would you suggest we go about finding a nominating co-funder for the $15,000? Is there a formal process for this? How have other organizations gone about finding funders that are interested in participating in Listen4Good's co-funded grant program?

Nonprofits generally go to funders with whom they have a good relationship, talk about the unique opportunity, and ask them if they would be willing to make a one-time grant to do this. Listen4Good has also been presented to various funders so there may be funders that are looking to support nonprofits to participate. We're happy to talk to a potential nominating co-funder to explain L4G, but we can't help you find a nominating co-funder.

32. Can we have multiple co-funders that together provide the $15,000 match?

Yes. Listen4Good's co-funded grant program is open to multiple co-funders for one organization's nomination. In a way, that's a win- win: We want funders to be informed through this work and, in this case, we'd be engaging more than one funder in the learning process.

33. Can you explain the role of the funder we bring in? Do they just provide the $15,000, or do they have additional responsibilities?

Our hope is that you will connect with your funder, share data, and together learn from the people you and they seek to help. At a minimum, we expect our funding partners in the co-funded grant program to participate in a one-hour orientation call with Fund for Shared Insight; discuss mutual learning goals with their nominated grantees; and hold a session to share learnings with grantees after the grantees receive their first rounds of feedback. Please see our Nonprofit-Funder Toolkit.

34. Can an organization be both the grant recipient and the funder?

No. If this were the case, an organization would essentially be taking $15,000 from their own funds and using it for this project. Organizations must secure an external source to provide the $15,000 matching grant. For organizations like a United Way, they can either be the grant recipient implementing Listen4Good *or* the funder providing the $15,000 co-funding grant to another organization that is implementing Listen4Good. A single organization cannot be both for the same grant.

REPORTING REQUIREMENTS

35. What are the reporting requirements for organizations participating in Listen4Good ?

For organizations participating in Listen4Good Online+, there are no reporting requirements, though we ask that organizations be willing to provide user feedback periodically throughout the process.

For organizations participating in Listen4Good's co-funded grant program, an interim grant report is due halfway into the project and a final report is due at the end. The goal of the reporting is to understand what it takes to implement L4G well, what grantees are learning, and what changes you may be making in how you both collect and use feedback data. (Note that grant reports are submitted to Fund for Shared Insight; there are no separate or additional reporting obligations to the nominating funder.)

In addition to implementing a feedback plan and reporting to Shared Insight on the grant, participants also agree to share learnings from their feedback loops with their nominating co-funder and discuss the interpretation of the data and application to their work. We hope that this open dialogue will help funders better understand their grantees' work and help funders with context and data to inform their own work. L4G provides a facilitation guide for supporting nonprofit-funder conversations.

BUDGET/USES OF GRANT FUNDS (FOR LISTEN4GOOD'S CO-FUNDED GRANT PROGRAM)

36. What exactly can nonprofits do with the grant funds received in the co-funded program? Can we pay for staff time? What about to purchase tablets or to pay for incentives?

You can use your grant funds for anything related to your Listen4Good project. The vast majority of budget allocation are for staff time to plan, implement, analyze feedback data, and closing the loop. You are also welcome to use your grant funds for costs such as technology equipment, gift cards or other survey incentives, translation services, or posters for closing the loop with clients.

37. Can we charge indirect costs or overhead to the grant?

Yes! In our effort to be a responsible project funder, we completely understand you will have overhead, and you can charge it to the grant. The amount should be reasonable and reflect the actual indirect cost. There is no set rule on the percentage but you are welcome to charge up to 25%.

38. What if our projected costs change during the grant (e.g., we decided not to purchase tablets)? Will we need to re-submit a new budget?

We understand that plans change and you may not need to use your funds in the way you originally anticipated. You will not need to submit a new budget when these changes occur. When you submit your interim and final reports, you can let us know how actual funds were spent.

COSTS (LISTEN4GOOD ONLINE+)

39. Who pays for organizations to participate in Listen4Good Online+?

Fund fort Shared Insight is subsidizing the cost of the program for all 2020 participants. Participating organizations or their sponsoring funders will pay only $1,000 each. All payer will be invoiced by Fund for Shared Insight for their participation.

For more information, go to Fund for Shared Insight's website.