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More Than Listening: Harnessing the Power of Feedback to Drive Collaborative Learning

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Reflective Practice

Key Points

- Foundations can and should do a better job of gathering feedback from and learning with both grantees and the communities they seek to serve. This type of collaborative learning has the potential to inform and strengthen foundation strategy, grantmaking practices, evaluation, and communications. Gathering meaningful input is difficult, however, given power dynamics between foundations and those they support. Even when authentic input has been gathered, it can be difficult to apply insights to ongoing work.
- What does it look like for a foundation to get feedback from its grantee and community stakeholders? Much of the feedback discussions taking place in the sector center on the role of nonprofit organizations. This article explores how foundations can harness the power of feedback to improve philanthropic practice, using the experiences of the James Irvine Foundation as a case example. It provides information about the foundation and its commitment to constituent feedback, presents two cases from its own experience gathering feedback from community stakeholders and grantee partners, and then lays out a series of culminating lessons and insights based on this work.
- Overall, Irvine believes that collaborative learning requires more than just listening. To truly harness the power of feedback, foundations must act on what they are hearing, share how they are responding with those who provided feedback, and open up this learning to others who can benefit. To do this effectively, foundations must evolve their internal organizational practices to better incorporate external perspectives.

Introduction: Why Focus on Feedback?

Feedback is all around us. We give and receive feedback at work and in educational settings. We seek and provide it in the process of developing new skills, be it learning to play the ukulele or run a faster mile. Businesses regularly ask us to provide feedback through surveys and focus groups as well as via rating systems embedded in our mobile phones. We also exchange feedback over everyday things in our personal lives — how last night's dinner tasted, how to get homework done more effectively, or how to be a better partner to our loved ones.

Despite the ubiquitous nature of feedback, there is a growing sense that social-sector organizations can do a better job listening and responding to those they aim to help. Unlike in business, the people nonprofits and funders seek to help are not paying for their services. This creates potential for market distortion, in that the party paying for services wields more influence than the people those services are meant to benefit (Stid, 2011). For nonprofits, this may mean listening more closely to organizational funders than to one's clients. For foundations, this may mean soliciting approval from board members and executives instead of from nonprofit partners and the communities they serve.

Over the past 10 years, there has been a growing number of articles, presentations, convenings, and tools focused on promoting greater attention to feedback in the social sector.[1] In this context,

[1] See, for example, the collection of articles hosted by the Fund for Shared Insight at https://www.fundforsharedinsight.org/knowledge.

feedback is defined as "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" (Threlfall Consulting, 2017, p. 5). Promoters of feedback point to a number of benefits, including increased program effectiveness (ORS Impact, 2018), increased innovation (Daidone & Samuels, 2019), greater agency on the part of community members (Twersky & Reichheld, 2019), and minimization of unintended harmful impacts (Buteau, Gopal, & Buchanan, 2014). Feedback can also be usefully applied at multiple points in the life of a program or investment — when designing a program to ensure it responds to constituent needs, preferences, and constraints; when implementing a program to identify potential improvements; and after a program is complete to determine what worked and what did not (Twersky, Buchanan, & Threlfall, 2013).

Despite the power of feedback to drive positive change, acquiring good feedback can be challenging. The process of getting it can be expensive, and obtaining representative and authentic responses may be difficult. Feedback also can cause discomfort for those in the position of delivering or funding services (Twersky et al., 2013). To address some of these challenges, several organizations have emerged to support organizations interested in listening more closely to their constituents. These include the Fund for Shared Insight, a funder collaborative working to improve philanthropy by elevating the voices of the people foundations seek to help; and Feedback Labs,[2] a nonprofit that promotes feedback loops through convening and sharing of tools and resources. The Center for Effective Philanthropy (CEP), which has long played a role in helping funders gather feedback from their stakeholders, has also published blog posts and briefing papers on the value and practice of obtaining grantee and constituent feedback. "Feedback is not a fad," argues Larry Kramer (2018), CEO of the William and Flora Hewlett Foundation, but instead should be an integral part of philanthropic strategy. Other foundation

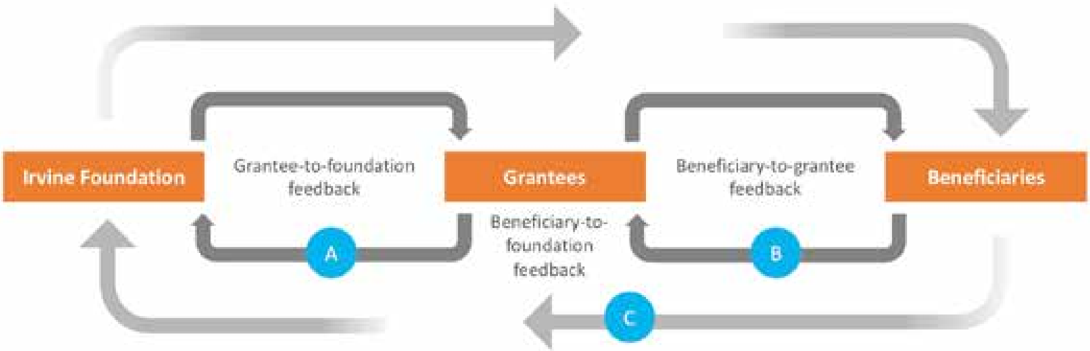
To truly harness the power of feedback, foundations must act on what they are hearing, share how they are responding with those who provided feedback, and open up this learning to others who can benefit. To do this effectively, foundations must evolve their internal organizational practices to better incorporate external perspectives.

CEOs agree: A 2016 CEP study identified learning from the experiences of constituents and of grantees as the top two promising practices CEOs identify for increasing foundations' impact in the coming decades (Buteau, Orensten, & Loh, 2016).

But what does it look like for a foundation to get feedback from its grantee and community stakeholders? Much of the feedback discussions taking place in the sector center on the role of nonprofit organizations. This article explores how foundations can harness the power of feedback to improve philanthropic practice, using the experiences of the James Irvine Foundation as a case example. It provides information about the foundation and its commitment to constituent feedback, presents two cases from its own experience gathering feedback from community stakeholders and grantee partners, and then lays out a series of culminating lessons and insights based on this work. Overall, Irvine believes that collaborative learning requires more than just listening. To truly harness the power of feedback, foundations must act on what they are hearing, share how they are responding with

[2] See https://feedbacklabs.org.

FIGURE 1 Feedback at Multiple Levels



those who provided feedback, and open up this learning to others who can benefit. To do this effectively, foundations must evolve their internal organizational practices to better incorporate external perspectives.

The James Irvine Foundation's Feedback Journey

The James Irvine Foundation was founded in 1937 with a broad mandate to "benefit the people of California."[3] Since its inception, the foundation has awarded more than $1.78 billion in grants to more than 3,300 nonprofit organizations. In January 2016, Irvine announced a new strategic focus (Howard, 2016), and its singular goal now is a California where all low-income workers have the power to advance economically. This shift is designed to respond to large and growing disparities in economic well-being and civic participation within the state.

Along with this shift in strategy, Irvine refreshed its approach to learning and assessing impact and elevated its commitment to feedback. This commitment is documented in the foundation's Impact Assessment and Learning Framework:

> We are accountable to our ultimate beneficiaries: Californians who are working but struggling with poverty. As a result, we are committed to broadening and strengthening our feedback practices — asking and listening, using what we hear to inform our work, and letting those we listen to know how we used what we learned. (Irvine Foundation, 2017, p. 5)

Staff have been inspired by the words of Bryan Stephenson, who urges,

> Find ways to get proximate to people who are suffering. When you get proximate to the excluded and the disfavored, you learn things that you need to understand if we're going to change the world. Our understanding of how we change things comes in proximity to inequality, to injustice. (Hubley, 2018, paras. 19–20)

In practice, the foundation has operationalized its commitment to feedback at three levels:

1. *Grantees:* Irvine gathers feedback from grantees through grantee perception surveys, engagement in strategy development, and grantee gatherings.

2. *Clients served by grantees:* Irvine actively participates in the Fund for Shared Insight and supports the fund's Listen4Good initiative, which provides nonprofits with funding and technical assistance to help them gather and respond to feedback from those they serve (Fund for Shared Insight, 2018).

3. *Those the foundation's grantees serve:* Irvine also gathers feedback directly from the people and communities it seeks to help through efforts such as community listening sessions.

[3] See the James Irvine Foundation's website at https://www.irvine.org/about/history.

The foundation views listening as integral to its philanthropic approach (Howard, 2018) and is testing new ways to incorporate this concept into its work. In essence, the foundation is on a journey to discover how it can best learn collaboratively with grantee partners and the community. While listening is critical, the foundation also values closing the feedback loop by sharing back what it has learned from these different stakeholders and how it is acting on this information. (See Figure 1.) In practice, however, listening and sharing is not always so linear.

This piece highlights how the Irvine Foundation has approached its feedback practices. The foundation is focusing on all three loops; however, since much has been written about beneficiary-to-grantee feedback as a result of the Listen4Good initiative, this article focuses on recent efforts at the beneficiary-to-foundation and grantee-to-foundation levels. Irvine hopes that by sharing its own knowledge and experience about feedback, it can add value to the field more broadly (Ammann Howard, 2018).

Beneficiary-to-Foundation Feedback: Community Listening Sessions

After Irvine announced its new strategic direction in January 2016, it committed itself to listening to and hearing from working Californians who are struggling economically. The CEO of the foundation was expressly interested in and supportive of listening to those Irvine seeks to help, and staff shared this enthusiasm. According to a blog post published in February of the following year, the foundation asserted, "We know that our ability to have an impact is directly connected to how well we listen to the organizations working to expand opportunity for Californians – and to those Californians themselves" (Ammann Howard & Gulley, 2017, para. 5).

It is worth noting that this was a different practice for Irvine. Historically, the foundation had relied on external research and talking with nonprofit and foundation colleagues as part of assessing needs and developing funding strategies. Sometimes the foundation spoke with community leaders and local elected officials; if it heard from community residents, this typically occurred through grantee site visits or community events hosted by grantees to which Irvine staff were invited. Going to the ground in this way — to directly listen to and learn from those the foundation seeks to serve — was unique.

To better understand the day-to-day experiences of the foundation's intended beneficiaries — their hopes, challenges, and aspirations — Irvine engaged a human-centered design firm to launch an ambitious listening project in incorporating a mix of research methodologies. The director of impact assessment and learning helped to design this process and drove it in collaboration with program and operational staff. The centerpiece of the effort involved partnering with community organizations to hold 14 listening sessions in six regions across California. (See Figure 2.) The sessions were anchored in broad questions focusing on the foundation's two key areas of interest — (1) economic security and mobility, and (2) voice in the decisions that affect participants, their family, and community — but intentionally had a very open format for discussion. This allowed for participants to talk about their experiences in a more holistic way that enabled Irvine to learn about its specific areas of interest as well as related issues and the broader context in which participants worked and lived.

The consultants initially recruited participants through online advertising, with the goal of hearing from people who may or may not be connected to current grantees. This proved challenging with regard to getting a sufficient number of participants to show up even with the offer of financial incentives, child care, and food. As a result, the main recruitment took place through engaging community partners who had strong relationships with low-income communities. While the emphasis was to broaden invitations beyond those individuals their organizations serve, this approach did not result in a sample as representative as that from the first method tried. Partnering with community organizations nonetheless offered an important benefit: They were able to provide participants with information about local supports relevant to challenges

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FIGURE 2 14 Community Listening Sessions in Six California Regions

they identified during the sessions. This was particularly important for participants who were experiencing a financial or family crisis.

Sessions were highly interactive, blending Q&A, group discussion, identifying patterns, brainstorming, and reflection. Participants were encouraged to share what they love to do, write down their challenges, and draw their ideas for change. More than 400 Californians attended these sessions, which were held in 10 languages. The foundation also conducted follow-up interviews with listening-session participants who were open to telling their personal stories in more depth. Finally, Irvine experimented with a mobile research app, called dscout, to reach 18- through 36-year-olds throughout the state in areas where listening sessions didn't take place. The app allows users to upload photos and videos in response to question prompts. Five themes that speak to fundamental human aspirations emerged through this process. (See Table 1.)

The process of gathering this feedback was by no means a perfect one. For example, partnering with local organizations to host sessions worked well in most cases, but in some instances, sessions were less well-organized: participant turnout and the quality of translators varied, for example. In addition, Irvine was interested in having staff in both grantmaking and operations attend and participate in sessions. While the foundation provided an orientation for staff attendees about the session itself and their specific role, staff would have benefitted from a better understanding of the purpose, design, and

TABLE 1 Community Listening Session Themes

Community Listening Session Themes
1. ***"I want to live without making extreme tradeoffs."*** Despite working hard, participants reported having to make difficult decisions about what they can afford in order to survive.
2. ***"I want to live without fear and anxiety."*** Busy schedules, unfriendly work environments, and unsafe situations make day-to-day life feel unstable.
3. ***"I want to be treated with dignity."*** Participants reported wanting respect for their contributions at work and in their communities.
4. ***"I want to be connected to a strong community network."*** Participants who are physically or socially isolated from strong personal or professional networks miss out on information and support.
5. ***"I want the opportunity to make my situation better."*** Some participants feel trapped in their current situation and that they can't make progress toward their goals.

context of the listening efforts more broadly, especially since this was a new approach for the foundation. Finally, the team that organized the community listening sessions was pulled together from across functions (program, communications, impact assessment and learning) and regions (San Francisco and Los Angeles). While having a cross-functional team was highly beneficial to this process, it took time for this group to build relationships and effective ways of working with one another.

So, what did Irvine do with what it heard? In some ways, it was testing what it meant to be a listener and how to use this listening to inform the foundation's work and be accountable to those it seeks to help. Hearing directly from those who are working but struggling with poverty about the impact of broader economic and political conditions on their lived experiences was a powerful and moving experience for staff. By documenting what was heard, the foundation was able to take and amplify participant voices on an ongoing basis in different staff and board conversations to help confirm or inform strategy, grantmaking, and research and development efforts. It also provided important contextual information about other issues (e.g., transportation, health care, child care) that the foundation does not fund but that impacts the same individuals it seeks to serve.

While it has been hard to draw clear linear connections between what staff heard and specific strategy and investment decisions, it has been a critical input that influences staff thinking and reminds them of the urgency and importance of Irvine's mission. As documented on the foundation's blog,

> The Community Listening Sessions changed us. They increased our empathy for the day-to-day experiences of Californians who are working but struggling to make ends meet, and gave us a chance to hear directly the voices that most often aren't heard." (Ammann Howard & Gulley, 2017, para. 11)

Indeed, staff found the sessions so powerful that they made sure photos of participants were posted in the foundation's largest conference room as a reminder of the people Irvine needs to listen to.

Grantee-to-Foundation Feedback Case: "Better Careers" and "Fair Work" Strategy Development

When Irvine embarked on the process of developing funding initiatives aligned with its new strategic direction, it also decided to engage more deeply with grantees in the process of developing new funding strategies. Irvine had a history of soliciting grantee feedback, including

FIGURE 3 Sample Learning Questions

Better Careers	Fair Work
Career pathways • What are promising approaches to create career and entrepreneurship pathways that lead to family-sustaining work? • What are the characteristics of effective pathway partnerships? • To what degree are supports integrated with career pathway education/training? • Where are there opportunities for this work to be sustained by other payers? **Jobs** • What are promising approaches to stimulate creation of "quality jobs"? • What are promising approaches to improve the quality of existing jobs? • What are promising approaches to improve hiring, retention, and advancement toward a quality job? • To what degree are supports integrated with employer retention efforts? • Where are there opportunities for this work to be sustained by other payers?	**Wage theft** • How can we incentivize employer compliance with wage laws? • How can workers best advocate in the current sociopolitical context? • How can government, nonprofits, and employers partner to make progress on this issue? **Worker organizing** • How does organizing need to change in today's landscape? • What capacities are essential to the effectiveness of individual organizations? • What capacities can support the overall field's sustainability? **Employer partnerships** • What motivates employers to take high-road approaches? • How does this play out in different industries? • What are the policy opportunities and challenges?

surveys such as those administered by CEP as well as directly in relationship with grantee partners. However, it sought to engage grantees more deeply in order to better understand regional context and the implementation environment for its strategies. It also viewed grantee engagement as a way to be more accountable to its partners and the public.

The foundation began the process of new strategy development by identifying two potential areas for investment in multiyear initiatives: (1) Better Careers, connecting low-income Californians to good jobs with family-sustaining wages and advancement opportunities, and (2) Fair Work, engaging low-wage workers to secure their wages, rights, and protections.

The identification of these areas was informed by Irvine's history of past investment; ongoing discussions among staff, grantees, and field experts; and consideration of opportunities aligned with the foundation's new strategic direction.

Irvine pursued some initial landscaping in each of these areas to identify needs and gaps, promising solutions, and potential areas of investment. This landscaping included reviewing demographic data and prior research and reports on poverty in California, and interviewing nonprofit leaders, funders, and subject-matter experts working on these issues. Building from this initial landscaping and its own experience, the foundation launched a pilot grantmaking program focused on high-functioning organizations whose work could inform foundation strategy. Starting in the summer of 2016, Irvine made flexible, two- to three-year grants to leading organizations in a learning phase as it developed potential initiatives. It also identified a set of learning questions to inform efforts to develop new initiatives in each area. (See Figure 3.)

Following these initial grant investments, Irvine spent more than a year listening to pilot investment grantees while also engaging with employers, thought leaders, and other stakeholders throughout California to obtain their perspectives on the needs, issues, and opportunities within these areas. The approach to grantee engagement was customized to each area.

Better Careers

For Better Careers, pilot grantees were involved in a series of convenings collaboratively designed with foundation staff to maximize shared learning in areas related to the workforce and employment landscape. Conversations allowed for deeper exploration of identified topics, including understanding potential solutions and important regional considerations in middle-wage training and job opportunities, effective employer engagement, and recruitment and hiring practices.

This listening and learning work helped to inform hypotheses underlying initiative design as well as additional investment ideas. For example, one hypothesis pertinent to Better Careers was that while middle-skill jobs exist, training necessary to obtain those jobs is lacking. This was affirmed and helped to hone Irvine's focus to include a learn-and-earn approach (e.g., apprenticeships) as a part of the initiative design. In addition, the process surfaced access challenges, as many low-wage workers aspire to become apprentices but do not have the requisite skills (i.e., soft skills, math). This led the foundation to include some investment in pre-apprenticeship programs that position individuals for success in apprenticeship programs that lead to the middle-skill, middle-wage careers that they need to thrive.

Fair Work

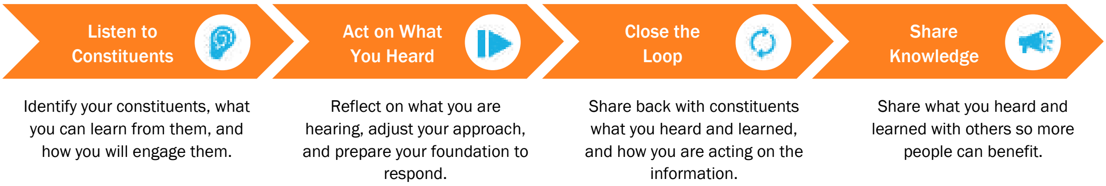
The Fair Work process included an initial gathering of pilot grantees, interviews and site visits to dive deeply into the experience of each organization, and a larger convening that included grantee partners and field experts to explore perspectives on a range of issues: wage theft and worker protections, immigration, worker organizing, capacity building, and emerging narratives related to low-wage work. The process culminated in a follow-up survey, which asked grantees to prioritize topics that were identified as central to the proposed initiative's emerging strategy.

"Our central approach to learning in our pilot phase — guided by investments in strong leaders, organizations, and networks — allowed Irvine to engage stakeholders deeply as full partners in exploring needs and opportunities to expand impact."
– Connie Malloy, portfolio director

This process helped to explore hypotheses about the needs of community-based organizations and what role Irvine might play. For example, the foundation believed that organizations had unique capacity needs but that some needs were shared across organizations. Indeed, leadership development emerged as a need across organizations with potential to be addressed through a statewide program. In contrast, organizations often had unique management-capacity needs, better addressed through tailored supports.

Over the course of this learning phase, foundation staff held team retreats to analyze and integrate information gathered from grantees and field convenings as well as discussions at the board and executive levels. The process of engaging deeply with grantees in the strategy development phase was new for foundation leaders and staff, and at times raised questions about the best way to approach this work. Some of the issues Irvine grappled with included the following:

FIGURE 4 The Feedback Continuum



- *Making staff time.* Strategy development processes often require a significant amount of time and effort on the part of foundation staff. Engaging grantees in strategy development added a new layer to this work that proved to be relatively time-intensive. Moving forward, Irvine has a better understanding of the time and support needed to effectively resource these efforts.

- *Respecting grantee time.* While Irvine's investments in pilot grantee organizations was fairly substantial and the foundation set an expectation of wanting to learn from their work, the process raised questions about how to use grantees' time most effectively. Collaborative learning requires making the time to build relationships, establish trust, and create spaces for open and honest dialogue. At the same time, the learning phase took place at a time when grantees, especially those on the Fair Work side, faced new pressures in terms of helping the people they serve with changes in federal policy.

- *Striving for alignment.* In the past, strategy development was primarily held internally at Irvine. Incorporating grantees into strategy development and aligning this with the decision processes of the foundation proved to be difficult. At times, tensions emerged around how to manage perspectives across grantees, program staff, and the board. For example, grantees identified many needs, and it was up to foundation staff to make hard choices about how to prioritize those needs, to determine where Irvine was well-positioned to play a role, and to articulate strategies that board members would likely support. Navigating this required care and attention in order to honor grantee perspectives and staff expertise along with norms of institutional governance.

Despite challenges encountered along the way, Irvine has found the feedback and exchange of ideas that took place during the pilot learning phase and the community learning sessions to be tremendously valuable. The foundation gained new insights into both the needs of low-income Californians and promising innovations in the field. It also gained significant knowledge about the individual and collective capacity needs of organizations working in these arenas. The resulting strategies are responsive to the perspectives of organizations working most closely with the people that Irvine seeks to benefit.

Beyond Listening: Moving Along the Feedback Continuum

Through the process of implementing feedback mechanisms, Irvine has gained new insights and lessons about how to harness the power of feedback for collaborative learning. Irvine now conceptualizes its feedback practices along a continuum that begins with listening to constituents, followed by acting on what is heard, closing the feedback loop, and sharing knowledge learned with others. (See Figure 4.) While many listening efforts stop at the listening stage, moving through the other stages of the continuum is critical for deepening collaboration and learning with external stakeholders.

Reflecting on this continuum, the following are some overarching insights regarding what it takes to effectively harness the power of feedback within the philanthropic context.

Listening Well Takes Time, Resources, and Support

Gathering feedback from grantee partners and the communities they serve is not something for foundations to take lightly. Designing processes that enable meaningful engagement requires planning, dedicated time, investment of staff hours, and outside support from consultants who bring expertise in constituent engagement.

For example, the community listening sessions required the allocation of significant staff time in spite of a robust consulting team and community partners. In addition to allocating time for feedback-gathering, it is also important to make time for staff to reflect, process, and adapt to what they are hearing. Iterative analysis allowed for adaptations during the listening process; immersive staff and community-partner workshops provided a process to make meaning of the findings; and synthesizing the data in different ways (e.g., by initiative or regional focus) allowed staff to see more direct applications to their work.

Value Grantee and Community Time and Experience

Participating in the process of providing feedback also takes time and resources. Foundations should be mindful of the burden being placed on participants in terms of time and the costs of participation. There are different levels of burden associated with participating in virtual surveys versus in-person sessions. For example, in-person sessions are longer; require time away from family, work, and friends; and may cost participants money. It is important to offer adequate reimbursement for time along with supports for travel and child care.

Foundations can also show respect for participants by ensuring they feel heard and understand how the information they provide will be used and that mechanisms are culturally, linguistically, and physically accessible.

> ***"Feedback takes time. You have to be patient. When you're not, you think you heard something, you run with what you heard, and then you can find out you didn't listen closely enough."***
>
> ***– Kim Ammann Howard, director of impact assessment and learning***

Be Prepared to Be Changed by What You Hear

The notion of listening to the perspectives and experiences of those foundations seek to help is a compelling one. However, listening comes with a responsibility to act on what you hear. What Irvine has found is that incorporating constituent feedback requires substantial internal preparation and ongoing efforts to engage staff and the board during and after the listening process. For the board, this involved inviting members to attend listening sessions as well as a board session to engage them with what the foundation was hearing during the process and surface areas in which they would like to learn more.

Constituent feedback is often just one of many inputs into strategy development, along with landscape scans, advice from field experts, and internal expertise. This can lead to tensions about how to honor feedback, particularly when other inputs suggest different needs and directions. It is important for foundations to consider how to adapt and/or sequence their decision-making and strategy-development processes to incorporate constituent feedback. Because board members typically hold the ultimate authority around strategic direction, it is important to have their support and backing for this work. It also requires an openness on the part of staff and board, who may hear things that take their work in new directions and/or challenge long-held assumptions.

"It's not just getting feedback, but being able share back what you learned. We say, 'here is what we heard, here is what we learned, and here is what we came up with.' That is the most challenging part of this movement. People think, 'As long as I listen, I'm good.' That's not what we mean by feedback."

– Kelley Gulley, senior program officer

Close the Feedback Loop

Beyond listening and acting on feedback, there is a third step in this process — closing the feedback loop. This involves sharing back with constituents what you heard from them and what you are doing in response. While on the surface this may sound simple, in practice it is often the least attended-to step. It takes time to process feedback, determine how to respond to what you heard, and obtain institutional approval for that response.

On the grantee side, there will inevitably be times when a foundation decides not to pursue an idea or recommendation that was provided. For example, grantees and community members generated many more ideas than the Irvine could reasonably tackle. Staff and board were cognizant that the foundation needed to narrow its focus and attend to those areas where it was best positioned to make a difference. It is important to be transparent with external stakeholders about how you responded to feedback, even in cases where a different direction was pursued. Being clear about what goes into foundation decisions beyond constituent feedback can be helpful.

On the community side, Irvine found it easier to close the feedback loop with grantees than with the low-income Californians who participated in listening sessions. While Irvine did share the results of the listening sessions via an interactive website,[4] a webinar, and emails and texts to participants (in a few languages), these materials did not indicate in detail how Irvine was responding to what it heard. While this was in part due to wanting to share results in a timely manner, subsequent follow up about application was still challenging.

If the foundation pursues a similar effort in the future, it will place more intentionality into this on the front end — for example, by anticipating what information might be available when, brainstorming options for sharing information back, and then testing these options directly with stakeholders.

Share for the Benefit of Others

Beyond closing the feedback loop, Irvine has also made a commitment to share feedback with potential to add value to the broader field. For example, the perspectives and experiences of low-income working Californians hold relevance to other funders, nonprofits, and policymakers in California. This was important because the listening sessions raised issues that Irvine was not well-positioned to address (e.g., child care and health needs). By intentionally sharing that information with other funders, including those who may not have been able to afford to conduct such sessions themselves (e.g., smaller regional funders), and making it available via a publicly website, Irvine sought to elevate the voices of these communities, influence the broader narrative about what workers experience, and inform other funders.

Communities also were able to use the information to support their efforts. For example, two community partners used the information to develop local opinion pieces drawing attention

[4] irvine.org/cavoices.net

to the needs of workers. Finally, Irvine regularly used its blog[5] to report back on what it is learning from engaging its constituents and how it is applying that information with the broader goal of supporting the field overall (Gonzalez & Folmer, 2018).

Ultimately, foundations who choose to embark on their own feedback journey should approach the process with an open mindset, humility, and a willingness to experiment. It takes time to determine the best approaches to gathering feedback, to incorporate feedback into a foundation's way of working, and to find effective ways of sharing back with participants and the field. Not everything will go smoothly all the time, and adjustments will need to be made along the way. In addition, there may be aspects of the feedback process that remain a puzzle, even when good progress has been made.

Cultivating institutional readiness for the full continuum of feedback practices is also critical to success. While community wisdom is often valued and desired by foundations, there is a tendency to hold this wisdom at arm's length and reserve room to exercise authority without clear accountability to one's stakeholders. But engaging in meaningful feedback practices demands a change in business as usual. Foundations must be ready to take responsibility for acting in response to what they hear and being transparent about their decisions with grantees and community stakeholders. This can be challenging for foundations used to relying on staff knowledge or consultant expertise in the design of strategies, or that have not laid the necessary groundwork with their boards about the importance of community responsiveness and transparency. Even at Irvine, with a staff and board fully committed to the inclusion of community and grantee voice in its work, there were still challenging moments requiring thoughtfulness and negotiation across stakeholders to determine the best path forward.

Conclusion

Overall, Irvine has found tremendous value in listening and sharing insights with its grantee partners, community stakeholders, and the field. The foundation remains committed to deepening its feedback practices and is exploring new approaches and ways of elevating the voice and perspectives of its grantee partners and low-income working Californians. For example, the foundation recently surveyed a cross-sectional, representative sample of working Californians that builds on the themes of the community listening sessions. This study revealed that nearly half of working Californians are struggling with poverty, a finding that generated significant press coverage helping to call attention to the prevalence and impact of poverty within the state (Vandermaas et al., 2018).

"If you want to move from listening to collaboratively shaping strategy, you have to adjust strategy-development processes within the foundation, including how you engage the board and executive leadership. You have to integrate constituent feedback into board and executive team discussions, and get internal stakeholders ready for that. The integration of feedback with general foundation practices should not be underestimated."

– Elizabeth Gonzalez, former portfolio director

[5] See https://www.irvine.org/blog/getting-to-better-careers-what-we-learned.

Reflective Practice

Designing Feedback Processes for Success

To design a rich and successful feedback process, it is important to clarify desired outcomes and design processes that will lead to those outcomes. For the James Irvine Foundation, this means answering four critical questions on the front end of every feedback process:

- **What do we want to learn?** Identifying learning questions to guide the gathering of feedback is an important but frequently overlooked aspect of this work. Rather than starting with a blank slate, Irvine staff have found it helpful to articulate assumptions about what is known as well as gaps in knowledge, in order to shape an initial set of learning questions. Once these are articulated, the next step is to pose questions in ways that draw on constituents' personal and professional experience. When engaging Fair Work grantees, the initiative team has found it helpful to lay out what it has heard, what it thinks this means for its own work, and learning questions for grantees in written form, and then to share these in advance of grantee convenings. Grantees have appreciated this transparency and felt that it makes for richer learning and discussion.

- **What will we do with what we learn?** Clarifying what the foundation will do in response to what it learns is critical to discuss in advance. There is no use in gathering information that has a low likelihood of influencing the foundation's programming. Therefore, it is important to think through institutional processes that govern decision-making and how to cultivate internal readiness for external feedback. In addition, it is worth recognizing that providing feedback can be burdensome on participants. With Irvine's community listening sessions, community members sometimes shared personal and heartbreaking stories about the tradeoffs they make in their daily lives with the goal of supporting the well-being of themselves and their families. Foundations need to be sensitive not only to the time it takes for constituents to participate in sessions, but also to the issues these sessions can raise and how to respond. Early in the process, the foundation worked with community partners to ensure the availability of referrals to community agencies for listening-session participants with very timely needs.

- **What are our expectations of participants?** It is important for foundations to clarify expectations of participants. How much time will they need to devote to this process? What information and insights can they provide that would not be available from other sources? To what extent is there an emotional burden associated with the process of sharing information, and how might this be managed or mitigated? What will the participants want to know about how the foundation is using information once the engagement period is over, and what is the best way to provide that information? How can we demonstrate the value of their time and willingness to share (e.g., financial incentives, food and child care at the event, reimbursement for transportation)?

- **How will we share what we hear with participants and others?** It is important to set expectations with internal stakeholders about how information gathered will be synthesized and shared back with participants and others, along with the foundation's response to such information. Doing so on the front end can clarify what the foundation hopes to learn, how it will act on the information it gathers, and the best way to report back to participants. Being intentional about this step increases the chance of adhering to the full feedback continuum of listening, responding, closing the loop and sharing.

Additional resources regarding how foundations can open up their practices to better incorporate constituents can be found in the Foundation Openness Section of the Fund for Shared Insight's Knowledge page, at https://www.fundforsharedinsight.org/knowledge/?t=foundation-openness#knowledge-tabs%7C2||knowledge-tabs|2.

With respect to its grantee partners, Irvine is exploring the creation of an advisory network that would provide input and counsel on additional grantmaking investments with potential to accelerate the impact of core initiative grantees. The foundation has also committed to convening its Fair Work and Better Careers grantees at least once a year to share and exchange learning about the work that is taking place to advance opportunity for low-income Californians. The James Irvine Foundation looks forward to continuing to share its journey and to learn from others about how to design and implement strategies that are truly responsive to the needs and wisdom of communities.

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