



RAISE

Texas Summit 2023

MAR
2 - 3

at the
Federal
Reserve
Bank of
Dallas

CONNECT TO EFFECT:
BUILDING AN EQUITABLE
FINANCIAL ECOSYSTEM
FOR TEXANS

Listen4Good



Creating Effective Feedback Loops

March 2, 2023

RAISE Texas Summit 2023

Thought Experiment:

Think of a recent project. How would it look different if client or community voices were systematically integrated?

Listen4Good: Signature Initiative of Fund for Shared Insight

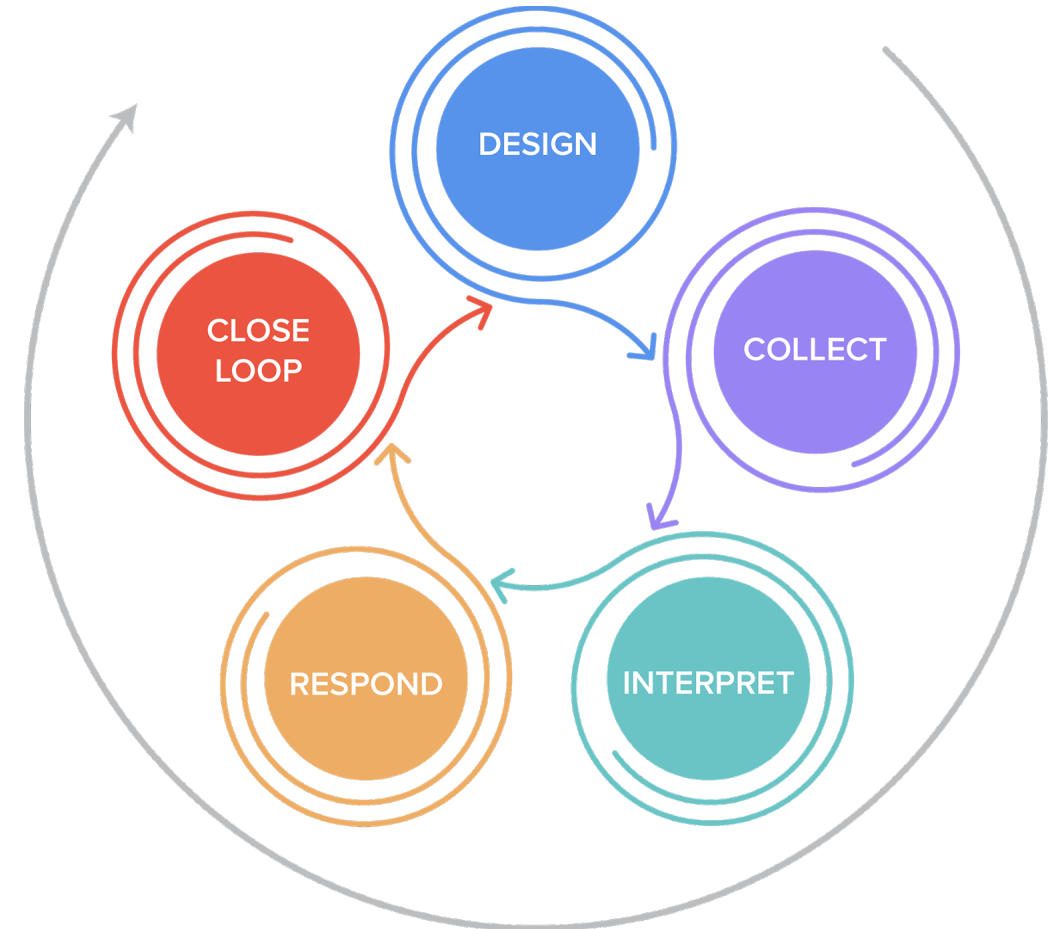
A capacity -building program that enables nonprofits to build sustainable, high-quality client -focused feedback loops.

7 YEARS IN OPERATION

775+ ORGANIZATIONS

125 CO-FUNDERS

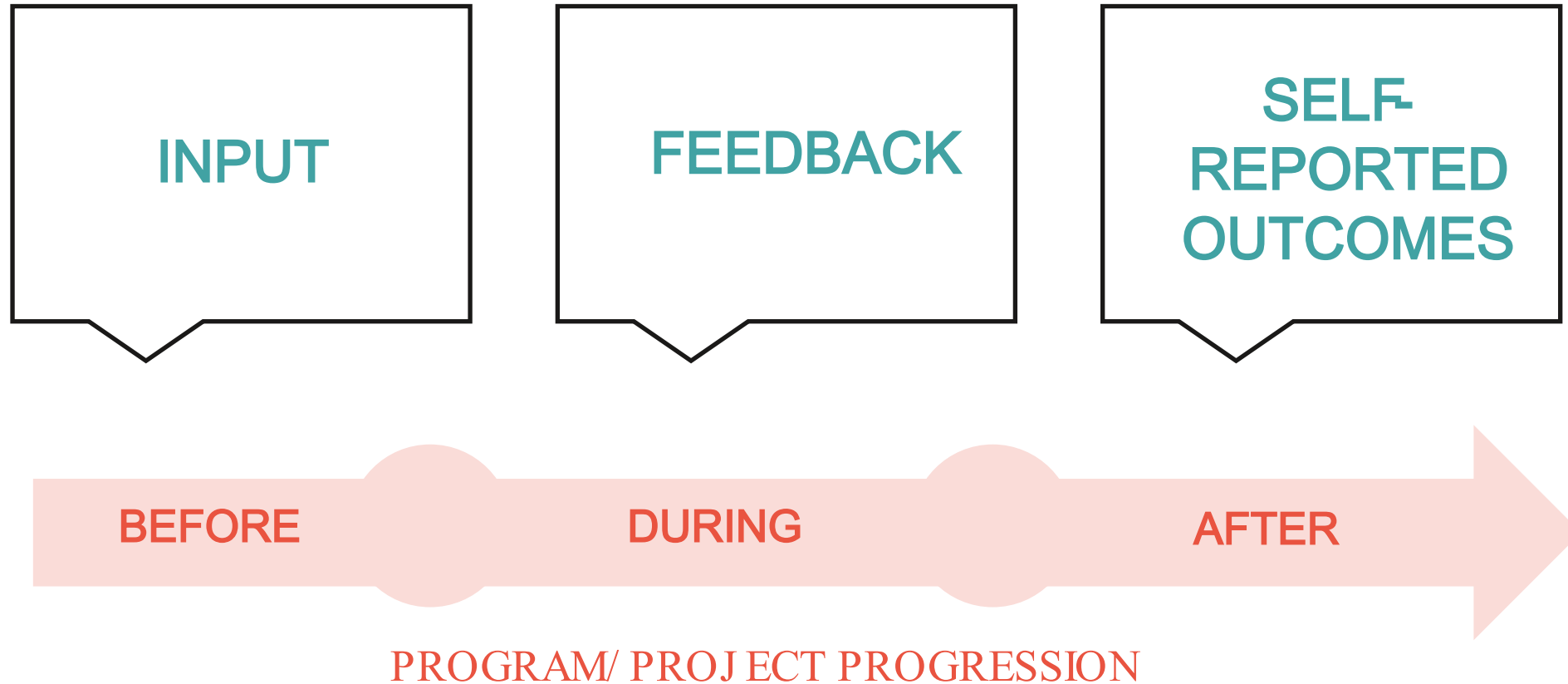
196K+ VOICES HEARD



Our Roadmap

- 1 High Quality Listening: What Is It?
- 2 Best Practices for Listening and Building Feedback Loops (Part I)
- 3 Interactive: Workshop Your Own Feedback Experiment
- 4 Best Practices for Listening and Building Feedback Loops (Part II)
- 5 How To Get Started

What Do We Mean By High -Quality Listening And Feedback?



What Do We Mean By High -Quality Listening And Feedback?

INPUT

Are there services that you think this community needs?

FEEDBACK

Do you feel treated with respect by staff?

What could we do better?

SELF REPORTED OUTCOMES

Do you feel better prepared to get a job after participating in training?

Why Focus On Feedback?



Those who design programs have blind spots, gaps in knowledge, and biases



Negative experiences reduce client participation, which leads to worse outcomes



Feedback can shift power and advances equity

Feedback Provides a Data Source for Organization's Continuous Learning

STRATEGY/ DESIGN

- Provides insights about target population's needs
- Informs strategy development/ choices

MEASUREMENT

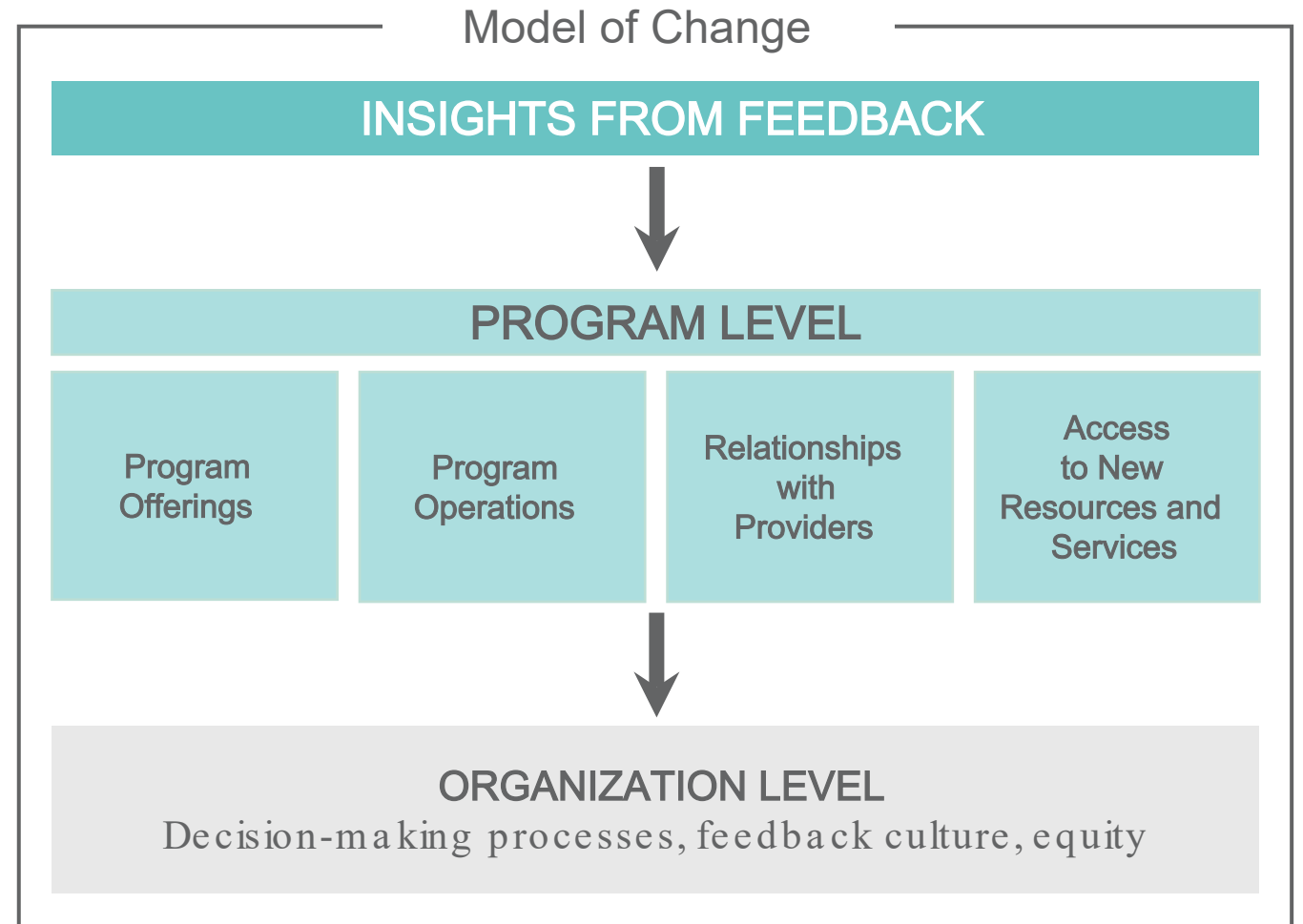
- Informs assessment of how services could be more impactful



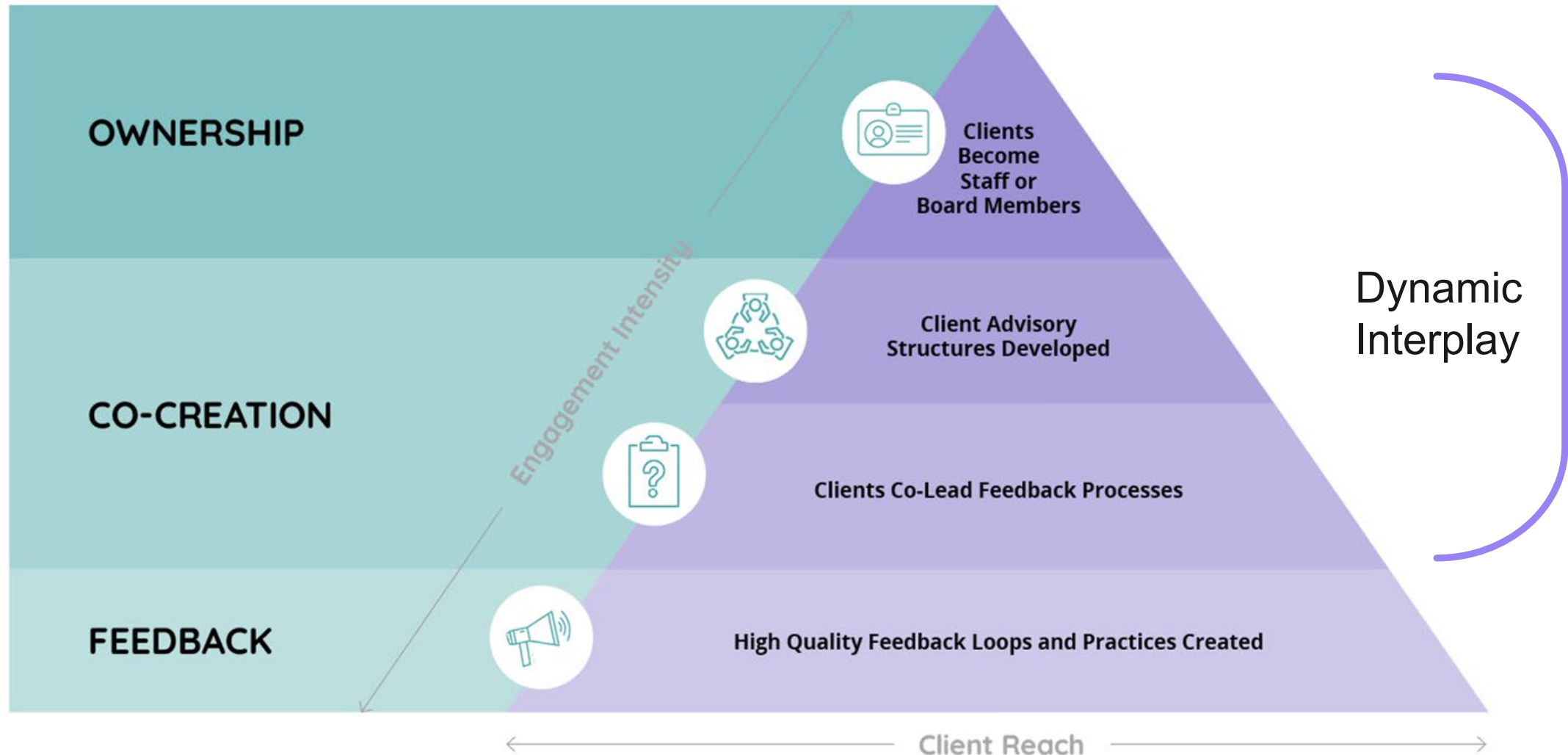
EXECUTION

- Informs recruitment and retention
- Shines a light on differences in client experience based on race/ ethnicity or gender

How Feedback Leads to Change for Organizations?



Ongoing Feedback Practice Provides a Foundation for Organizational Equity Work



Feedback is Growing Across the Social Sector



“The movement to seek and use feedback from the people who organizations seek to serve, is rapidly gaining ground....The idea that we should listen to the people we seek to help, of course, has antecedents—in community organizing, participatory evaluation, and, more recently, human-centered design. It has a longer pedigree in the for-profit world, and we can easily adapt tools developed in that setting to gather, analyze, and act on feedback for the social sector.”

– Larry Kramer,
President of the William and Flora Hewlett Foundation



14

[Video Link](#)



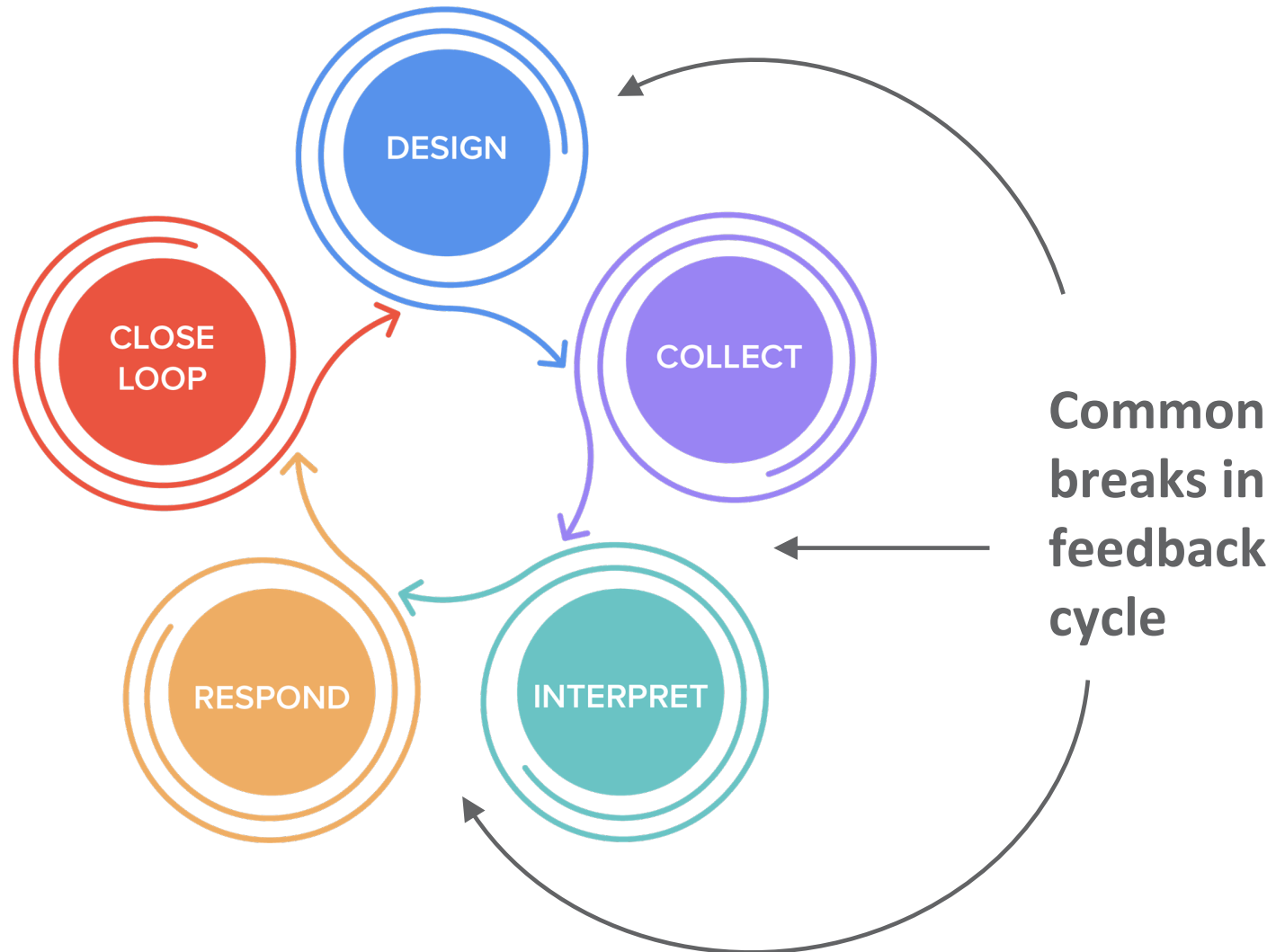
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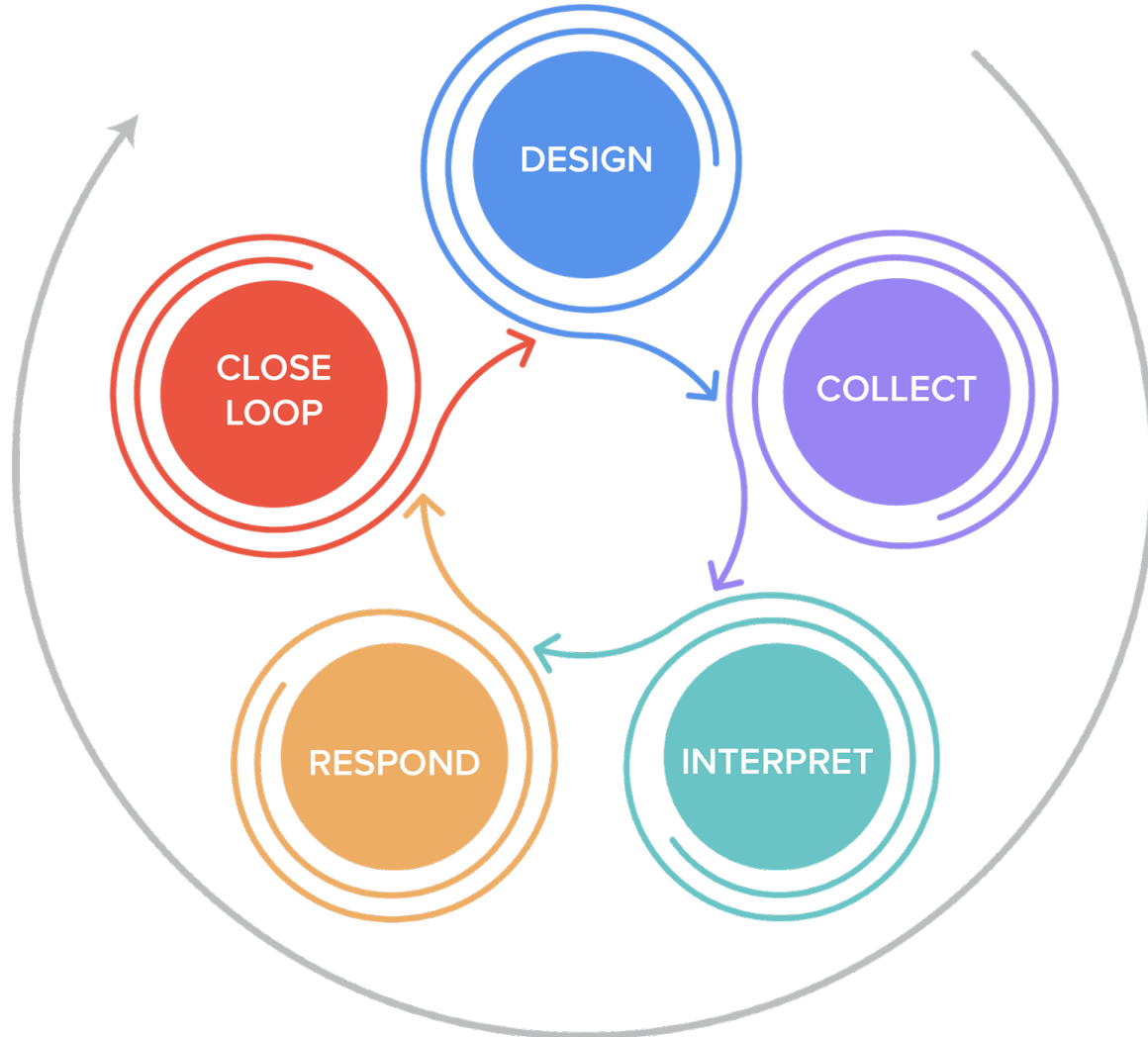
Unfortunately, Gathering Feedback is Often Viewed as a Data Collection Exercise



This Leads To Breaks In the Feedback Cycle...

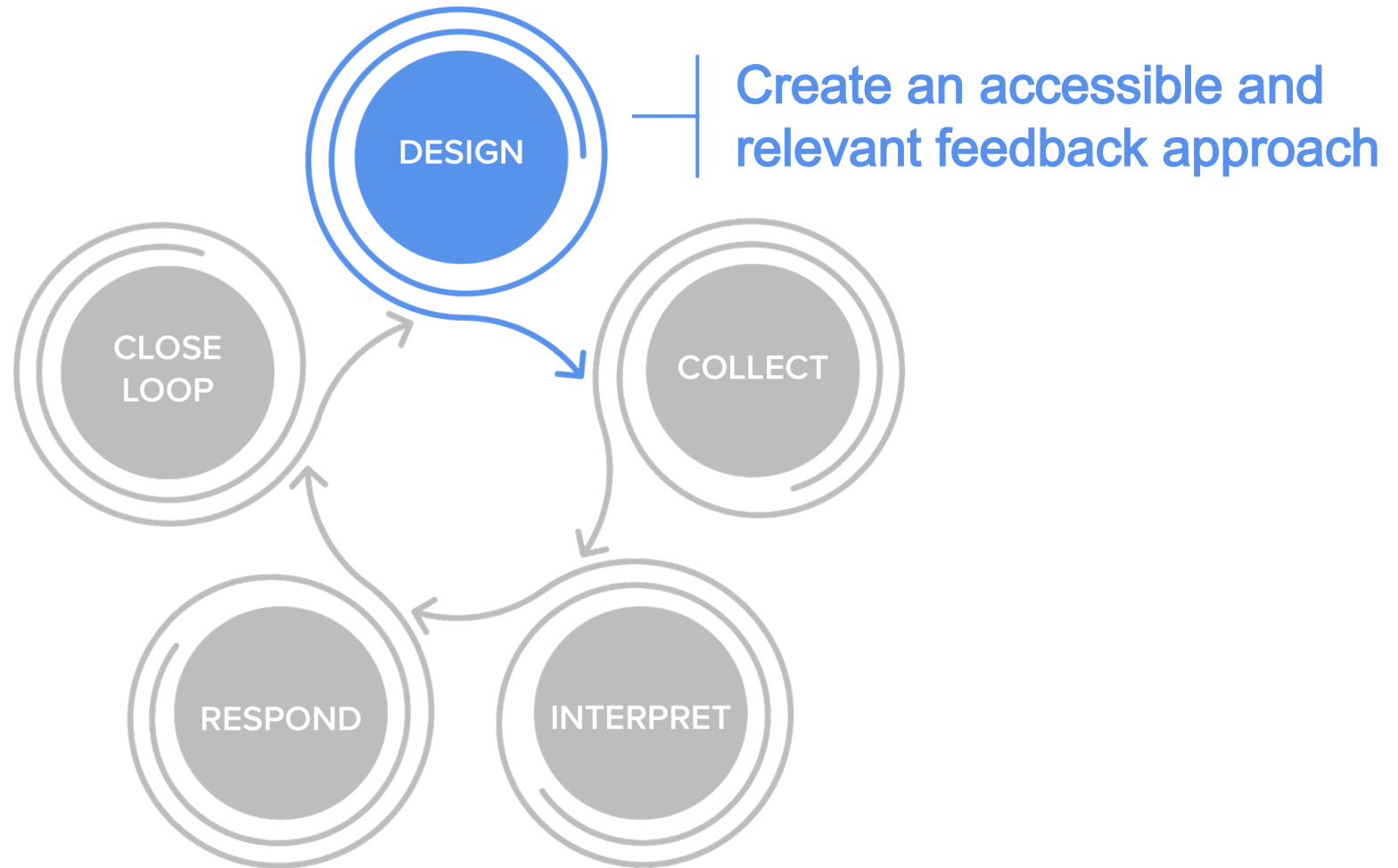


...Which Have Limited Feedback's Usefulness

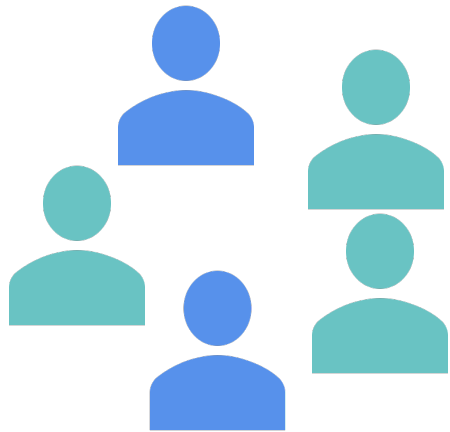


**When fully implemented,
feedback loops can lead
to meaningful change**

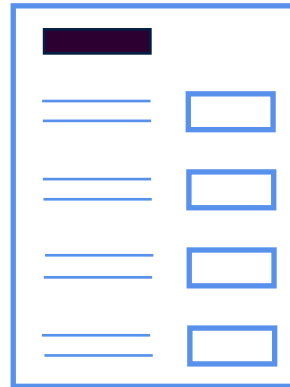
Step 1 – Design



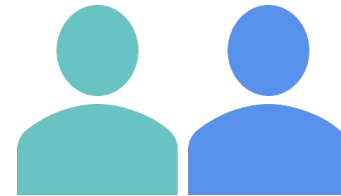
There Are Many Ways to Gather Feedback



Community
Research



Surveys



Focus Groups/
Listening Tours



Advisory
Boards

There Are Tradeoffs to Various Approaches (1/2)

APPROACH	PROS	CONS
Community Research	<ul style="list-style-type: none">✓ Allows for direct research across wide swath of community	<ul style="list-style-type: none">✗ Can be considered extremely “arms-lengths,” lacking engagement
Surveys	<ul style="list-style-type: none">✓ Most representative✓ Promotes candor through anonymity✓ Potential to benchmark data (external or over time)✓ Potential use of validated instruments	<ul style="list-style-type: none">✗ Survey fatigue✗ Can feel like an assessment✗ Qualitative feedback can be time-intensive to interpret

There Are Tradeoffs to Various Approaches (2/2)

APPROACH	PROS	CONS
Focus Groups/ Listening Tours	<ul style="list-style-type: none">✓ Candid Perspectives✓ Potential to “dig into” and probe issues	<ul style="list-style-type: none">✗ Less representative✗ Social desirability bias; lack of anonymity
Advisory Boards	<ul style="list-style-type: none">✓ Empowers constituents as contributors to program development and strategy✓ Promotes constituent leadership and agency	<ul style="list-style-type: none">✗ To be representative, requires high-functioning authentic process

Example: Advocates

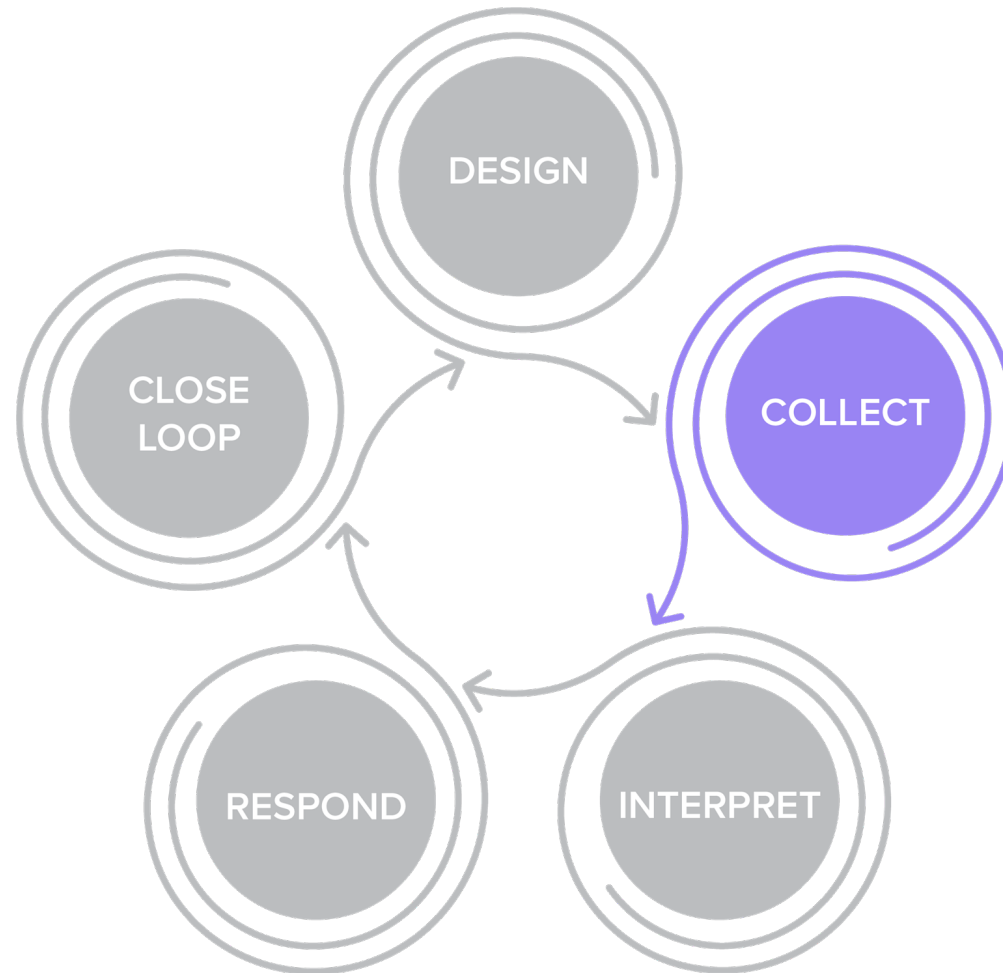
MISSION: Advocates champions people who face developmental, mental health, or other life challenges.

FEEDBACK PROCESS:

- Met with deaf advocates
- Add ASL video to survey
- Implementing complementary data collection efforts (focus groups, 1:1 interviews)



Step 2 – Collect

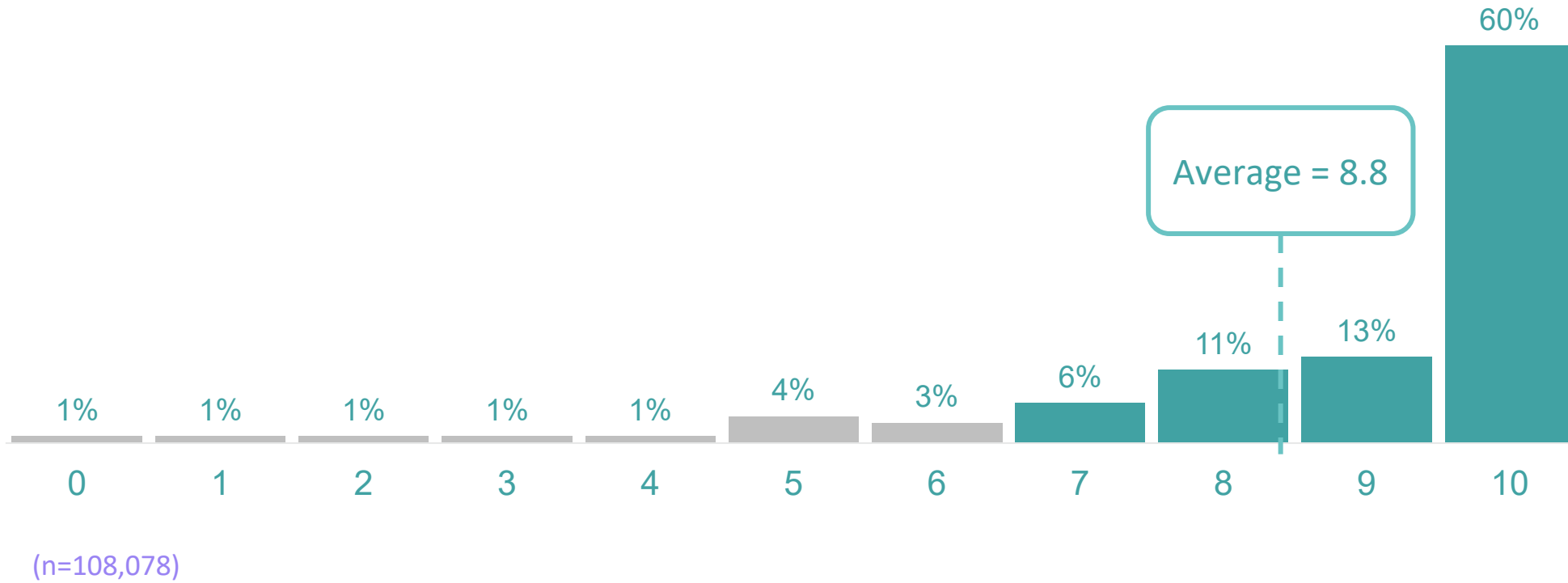


Implement data collection in away that captures a large number of representative voices and minimizes courtesy bias

A Challenge to Contend With: Courtesy Bias

1

How likely is it that you would recommend [organization] to a friend or family member (in a similar situation as you)?



Messaging And Framing Your Feedback Experiment Is Important

- The aim of collecting feedback is to improve services and learn more about needs vs. a punitive exercise
- Feedback is consequence -free and will have no bearing on provision or access to services
- Be clear about level of anonymity and confidentiality you can provide
- Responses to feedback will be shared back

Example: Beatitudes Foundation

MISSION:

Independent living retirement community, which provides a spectrum of support services to seniors

FEEDBACK APPROACH:

- Door to door paper surveying resident to resident.
- Senior resident council had input into design and led administration.



Example: Pace Center for Girls

MISSION

Provide young women an opportunity for a better future through education, counseling, and advocacy.

FEEDBACK APPROACH:

- Girls marketed the survey experience via a Snapchat video
- Creation of Girls Voice Week



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Designing Your Own Feedback Experiment



Designing Your Own Feedback Experiment

PART I (10 minutes): Answer the following questions, reflecting on how you might integrate community listening into one of your organization's current projects.



1. Who are the people ultimately designed to benefit from your program?	
2. What are 2-3 things that you might learn from listening to them?	
3. What would be an effective method for listening to the people you will be serving? See menu of approaches on page 3 for ideas.	
4. What are some of the barriers you may face in trying to connect with these individuals? How could you overcome these barriers?	
5. What could happen if you <u>don't</u> consult these individuals? (What's the "opportunity cost?")	



PART II (10 minutes): In pairs, choose one person (Person 1) to first share their answers to these questions. The partner listening (Person 2) will provide Person 1 with reactions/feedback, using the questions below as a guide, in order to help improve Person 1's listening experiment.

Person 2 reflection questions:

- What surprised you about what you heard Person 1 describe? What didn't you hear them say which you would have expected?
- What are 1-2 ideas you would offer to strengthen the proposed plan?

NOTES:

PART III (10 minutes): Now switch and have Person 2 describe their feedback experiment, with Person 1 providing reactions/feedback (using the same questions below as a guide).

Person 1 reflection questions:

- What surprised you about what you heard Person 2 describe? What didn't you hear them say which you would have expected?
- What are 1-2 ideas you would offer to strengthen the proposed plan?

NOTES:



Example: Natividad Foundation

MISSION:

Provide high -quality healthcare and trauma services to all residents of Monterey County.

FEEDBACK APPROACH:

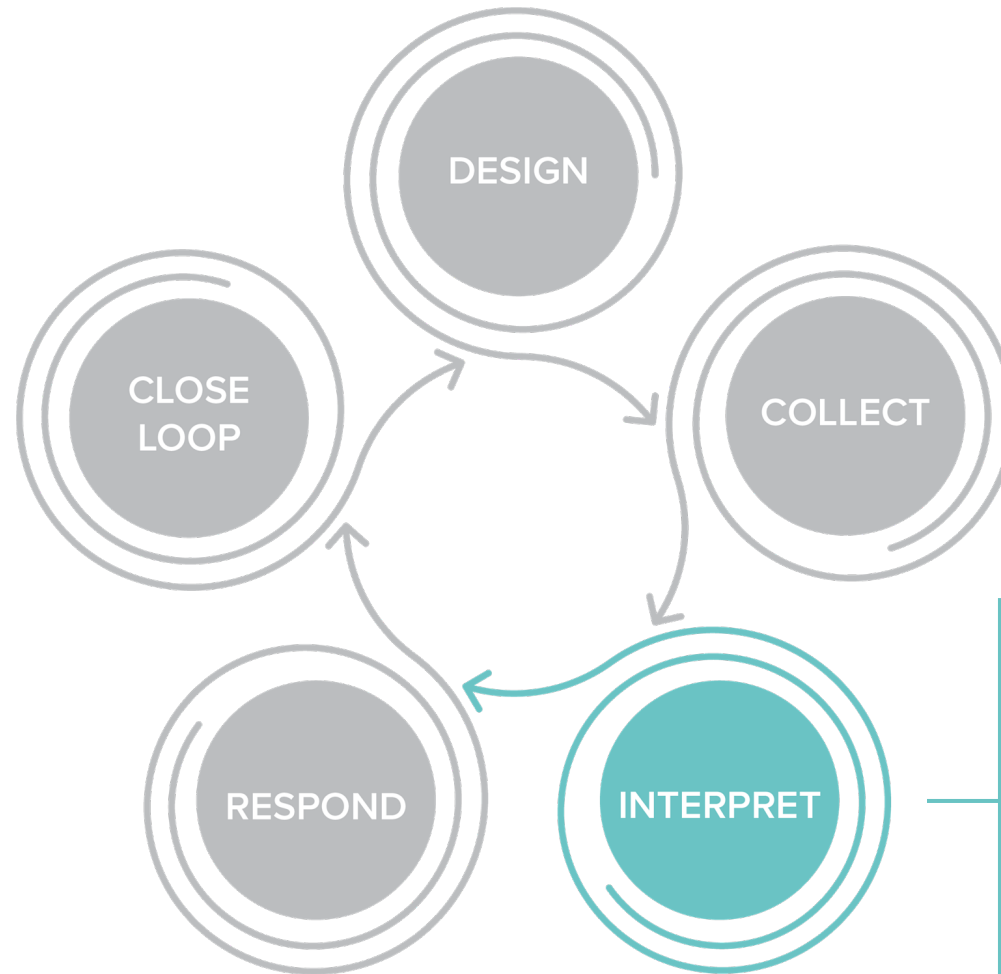
- Verbal interviews in indigenous languages
- Picture-based survey



Our Roadmap

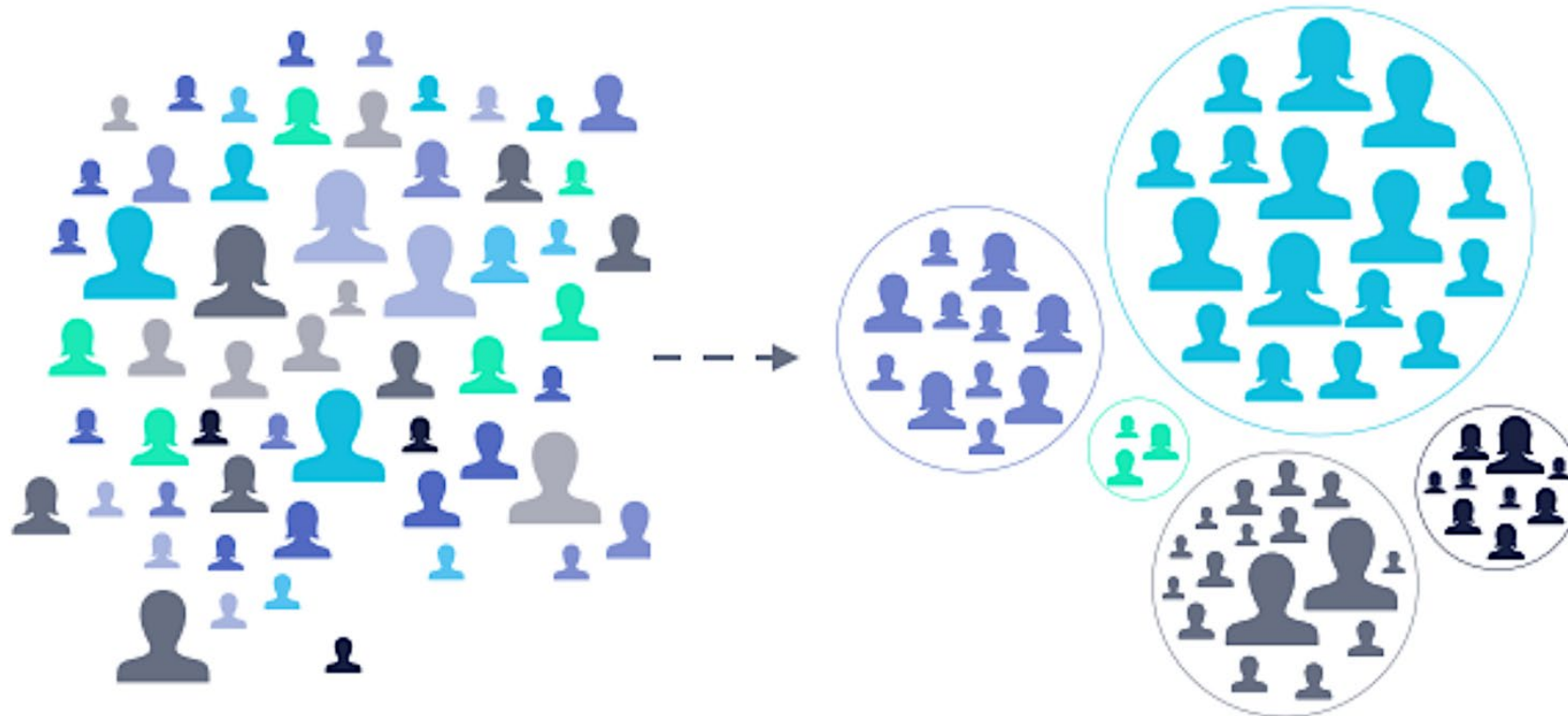
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Step 3 – Interpret



Identify areas for celebration and improvement, with particular attention to differential experiences across client groups

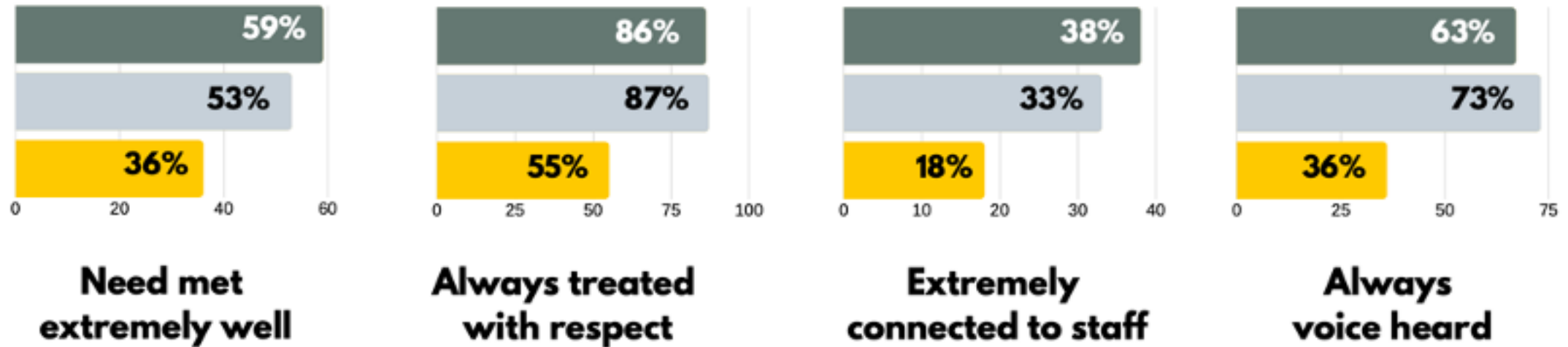
Segmenting Feedback Is Critical For Insights



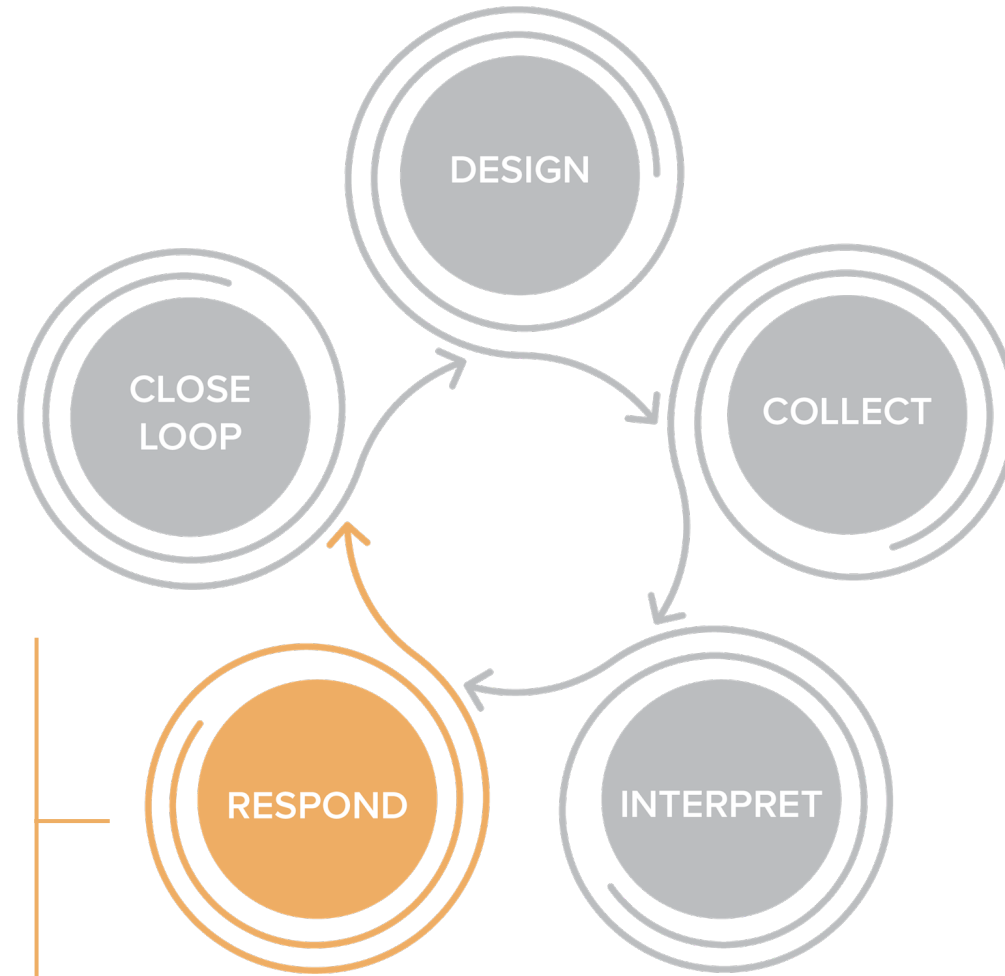
Example: Disaggregated Feedback

Experience by groups

Hispanic families White families Black and Multiracial families



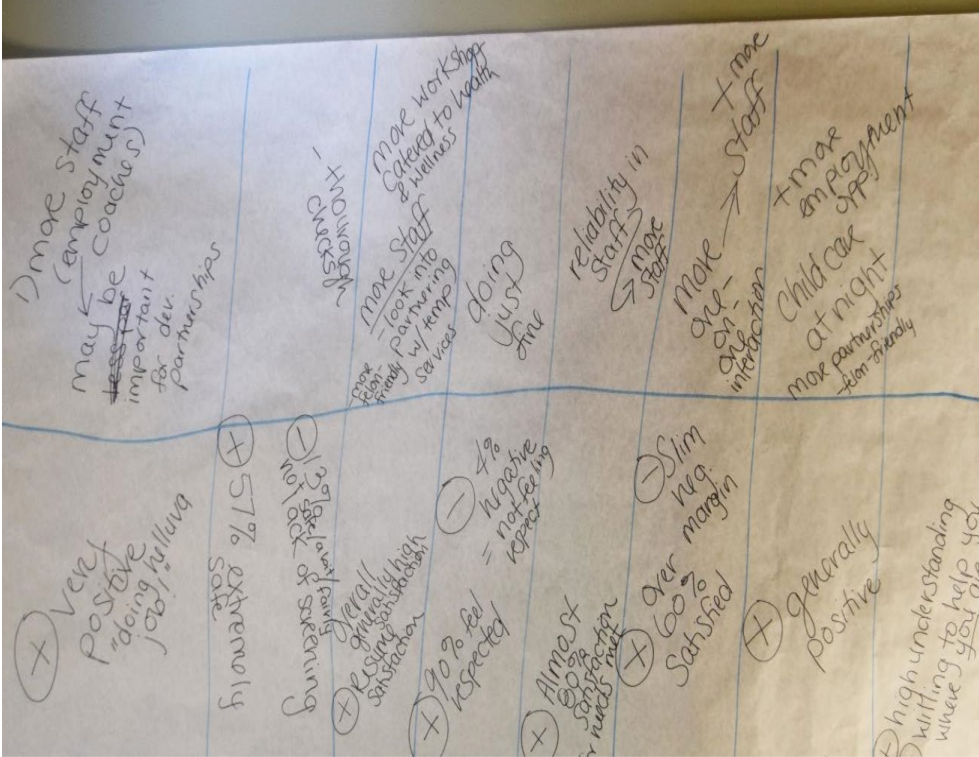
Step 4 – Respond



Engage internal and external stakeholders to learn from feedback and implement changes based on learnings

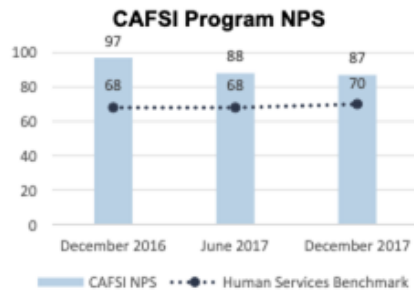
Example: Our House

Our House clients were included in the analysis process to help put findings into context—and better understand confusing feedback—or to probe initial results.



Example: Our House

CAFSI Survey Summary December 2017

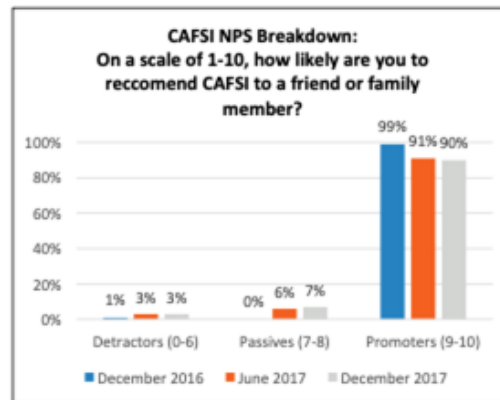


Data Summary

The CAFSI survey was taken by 70 current and former CAFSI clients. 34% of clients who took the CAFSI survey attended the Career Center in the past year, and 21% exited the Housing program in the past year. CAFSI parents reported having children enrolled in Little Learners (24%) and in Our Club (14%). 50% CAFSI survey respondents have Chris Ramsey as a case manager, 27% have Ruthie Hokans, 23% have Kelsie Hammons. 40% were enrolled 6 months or longer and 51% were enrolled 16 days-6 months. Six were enrolled less than 16 days. Of those who reported their gender, 94% were female. 50% reported interacting with CAFSI at least a few times a week. 90% reported that CAFSI made an extreme or large positive difference in their lives (the Human Services (HS) benchmark is 76%) and 81% reported that CAFSI met their needs very well or extremely well (the HS benchmark is 79%). 93% feel they are always treated with respect by CAFSI staff (the HS benchmark is 76%). Respondents gave CAFSI the highest score for including children in the case management process (4.44/5) and lowest score for helping clients maintain stable housing (4.22/5). 59% of CAFSI clients prefer to hear about the survey results informally from the CAFSI team. 76% believe CAFSI should survey clients every six months.

What is the CAFSI Program good at?

Goals *Motivating* Love *Communication* CAFSI *Life*
Resources *Helping People* Family *Assist*
Support *Understanding* Care *Chris*



Community Council Recommendations

1. Improve communication with clients.
2. Help clients meet more of their goals.
3. Help clients pay their bills and rent.
4. Help client get more involved with the Career Center.
5. For security, make sure the Our House gates are staffed.

CAFSI Action Plan

Objective A: Continue to ensure clients are benefitting from the full array of services/resources available through the Career Center and case management. *Community Council recommendations 1, 2, & 4*

- CAFSI case managers have refined the CAFSI Building Blocks of Stability (CBBS) Checklist and Plan by further integrating the Career Center certification tracks and courses into the CBBS Plan. The team will customize elements of the plan to offer an individualized experience.
- CAFSI case managers will be intentional about framing the CBBS tools as the centerpiece of the case management process and work to keep clients engaged with these tools.
- CAFSI case managers will continue to assist clients with using the Career Center calendar and available assessment tools in conjunction with the CBBS tools to create learning paths and action items that more accurately align with client schedules and goals.
- Case managers either begin or conclude each meeting with a review of client CBBS plan and Career Center calendar to keep clients informed.
- CAFSI will continue to provide weekly email updates and text messages detailing Career Center events, programs, and classes.
- Case managers will empower clients to take the lead role in their stability by holding them accountable to the CBBS plan, following up on case plan goals, and their commitment to actively participate for one full year.

Objective B: CAFSI will more effectively communicate our philosophy on homeless prevention and the importance of active participation in the program. *Community Council recommendation 3*

- CAFSI is a 12-month program designed to end homelessness through education and employment, financial empowerment, and health and wellness. While we do acknowledge the need for rent and utility assistance in many instances, these interventions are a small piece of a long process to end homelessness. We believe we most successfully lift families out of poverty through workforce training, post-secondary education, employment services, life skills development, holistic health and wellness opportunities, financial education, affordable housing, and quality rated childcare and early childhood education. These are primary supports we offer.

Thanks to our partners, we can provide some rent and utility support on a case by case basis, but these funds are limited, and therefore discretion is applied before providing such support. A significant determinant to receiving these resources is active participation. CAFSI will continue to refer clients to other agencies within the continuum of care that offer homeless prevention funds, rapid rehousing, and rent and utility assistance.

Objective C: CAFSI will communicate any safety concerns with the operations team and keep clients informed of any safety and security updates and upgrades. *Community Council recommendation 5*

- CAFSI will share our clients' concerns about gate security with the Our House operations team.
- CAFSI will communicate Our House security protocols and procedures to clients.
- CAFSI understands that safety is everyone's responsibility and we take seriously our duty to promptly report any suspicious or dangerous activity.
- The Lead CAFSI case manager will ensure each case manager is trained to report emergency situations, respond to crises, and help keep clients and team members safe.



Beware Of The 4'Ds ...

- Colleagues might feel **defensive** , and look outward for explanation
- Some might feel **dismissive** –questioning the methodology of the listening effort or the validity of the findings
- Others might feel **dejected** , or
- May **downplay** the negative.

Example: Responding to Feedback

Access+Capital used feedback to create a new product called the Nanoloan.



Startup Businesses

Up to 75% of Startup Cost

One of the biggest challenges you'll face as a new startup is getting enough capital to get your business off the ground.

[Learn More](#)



Nanoloans

\$5,000 - \$20,000

Fast turnaround loans for targeted business needs. We can provide nanoloan funding within just seven business days.

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Microloans

\$50,000 and Under

Flexible and affordable capital for existing businesses that need financing for working capital, equipment, debt refinance.

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Enterprise Loan

\$50,000 to \$500,000

For existing businesses that need financing for working capital, equipment, debt refinance, or tenant improvements.

[Learn More](#)

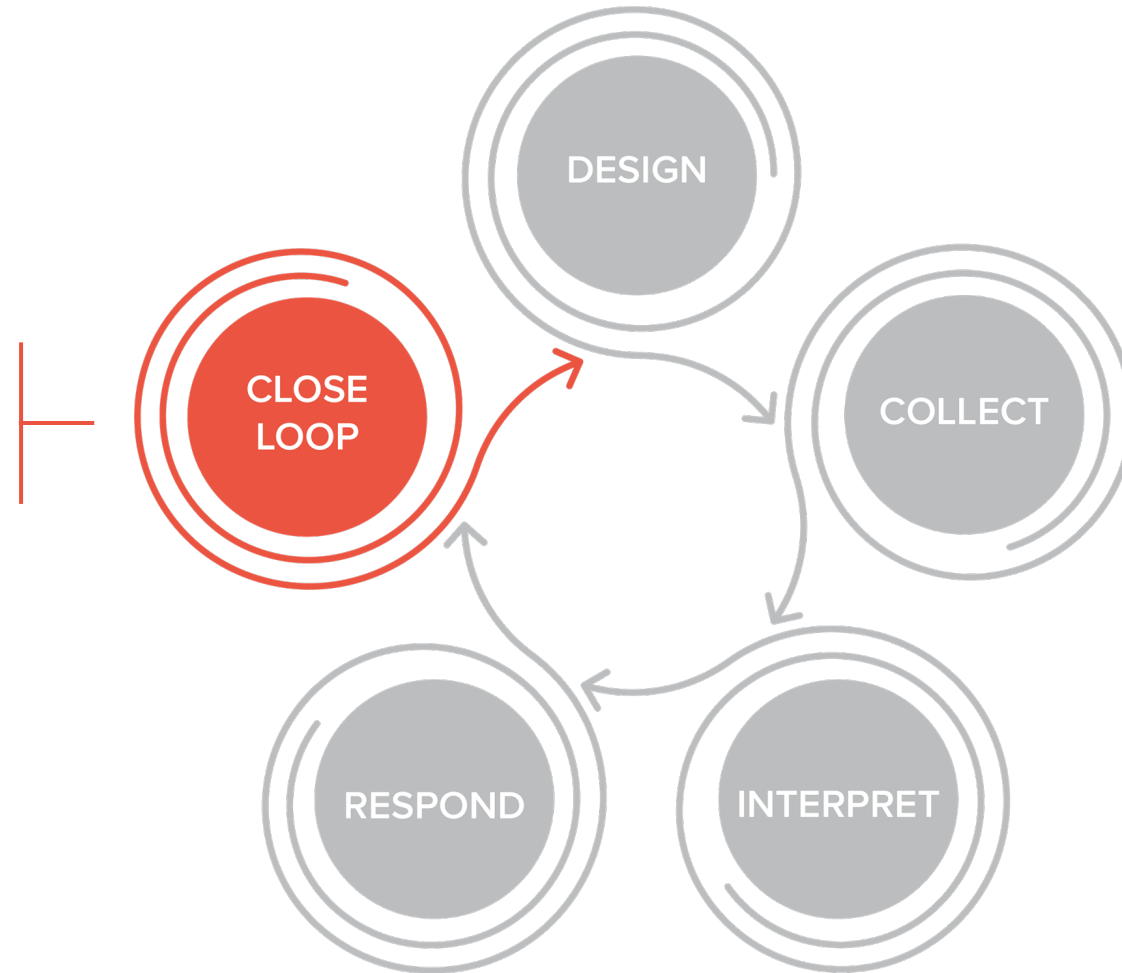
Issue Identified Through L4G: Loan process too slow, especially for return borrowers

Response: Expedited and simpler loan application process



Step 5 – Close the Loop

Communicate
back to clients
what was
learned from
listening and
planned
response to
feedback



Things To Keep In Mind For Closing The Loop

HOW

- **Approach:** How collaborative can you be?
- **Method :** What currently works for communicating with end-users?

WHAT

- **Messaging :** Keep it short, simple, relevant, action-oriented!


WHEN

- **Internally :** Be mindful of sequence for sharing.
- **Externally :** Don't wait too long; never a perfect time.

Example

**YOU ASKED.
WE LISTENED.**

You asked for more service hours and more service days.




[Nonprofit Y]

Tejas Health Care has changed its service hours and days to better meet your needs.

- The La Grange Medical Clinic offers evening hours Mondays and Thursdays until 7pm.
- Both medical facilities in Giddings and La Grange are now serving patients during the lunch hour.
- We now have Saturday service times at both medical facilities in Giddings and La Grange.


You asked for qualified healthcare professionals.



Providing Fayette and Lee Counties as well as surrounding communities with excellence in healthcare is what we do.
[Nonprofit Y]

- Tejas Health Care is comprised of well-trained, board certified, experienced providers.
- Our highly qualified providers are comm [Nonprofit Y] e.
- At Tejas Health Care, we put the patient first!

You asked about more health programs for women.



[Program A]

HEALTHY TEXAS WOMEN

[Nonprofit Y]

Tejas Health Ca [Program A] provider for the Healthy Texas Women program:

- This program offers women's health and family planning at no cost to eligible women in Texas.
- Regular screening is the best method to detect breast or cervical cancer in its earliest stages.
- These services also can have a positive effect on future pregnancy planning and general health.

Example



Thank you for participating in the Listen for Good survey. You told us there are a few things you would like to see changed. Live Oak Community Resources heard you, and we want to make your experience at our program better. We are excited to start making improvements this summer.

	WHAT WE HEARD	WHAT WE WILL DO ABOUT IT
	"We need you to stay open longer on Fridays"	The Union has been informed that we intend to change our operating hours from 9am to 5pm, Mon-Fri, starting July 2.
	"We don't know about the other services you provide..."	We have created a flyer and poster listing all our services that will be available at our program.
	"We need access to mental health services..."	We have made counseling services available at all sites, free of cost for those who qualify.
	"Staff don't know enough about the government programs they are helping me apply for..."	We are scheduling trainings for staff with local experts in the field.
	"Your customer service needs improvement..."	All staff members were recently trained in conflict resolution skills to better your customer service experience.

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Getting Started

KEEP IT SIMPLE

**EXPERIMENT
TO FIND RIGHT
APPROACH**

CLOSE THE LOOP

Questions?

Interested in Learning More About L4G?

Visit <https://listen4good.org/> or contact Valerie@listen4good.org

Upcoming 2023 recruitment deadlines:

- June 1, 2023
- December 1, 2023