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Fund for Shared Insight: Media Analysis
July 2014–June 2015

September 2015

Introduction

Fund for Shared Insight ("Shared Insight") is a collaborative effort among funders that pools financial and other resources to make grants to improve philanthropy. Shared Insight believes philanthropy can have a greater social and environmental impact if foundations and nonprofits listen to the people they seek to help, act on what they hear, and openly share what they learn.

Related to feedback loops, Shared Insight's work is focused on increasing the extent to which foundations listen to others—especially the people they seek to help—and respond to their expressed interests. When Shared Insight talks about "the people they seek to help," they are referring to the individuals who receive programs and services from nonprofit organizations; for example, the students served by charter schools, the recently released prisoners benefiting from job-training services, and the low-income first-time mothers participating in prenatal through birth programs.

Over the next three years, Shared Insight would hope to see changes in the amount and kind of discourse in the field related to beneficiary feedback loops. In the summer of 2015, one year since the launch of the collaborative, ORS Impact repeated a media analysis of relevant blogs, periodicals, and reports[1]. The following memo outlines changes in the amount and kind of discourse in the field around feedback loops compared to the year before Shared Insight launched. We raise a few observations and considerations. More detailed methodological notes follow.
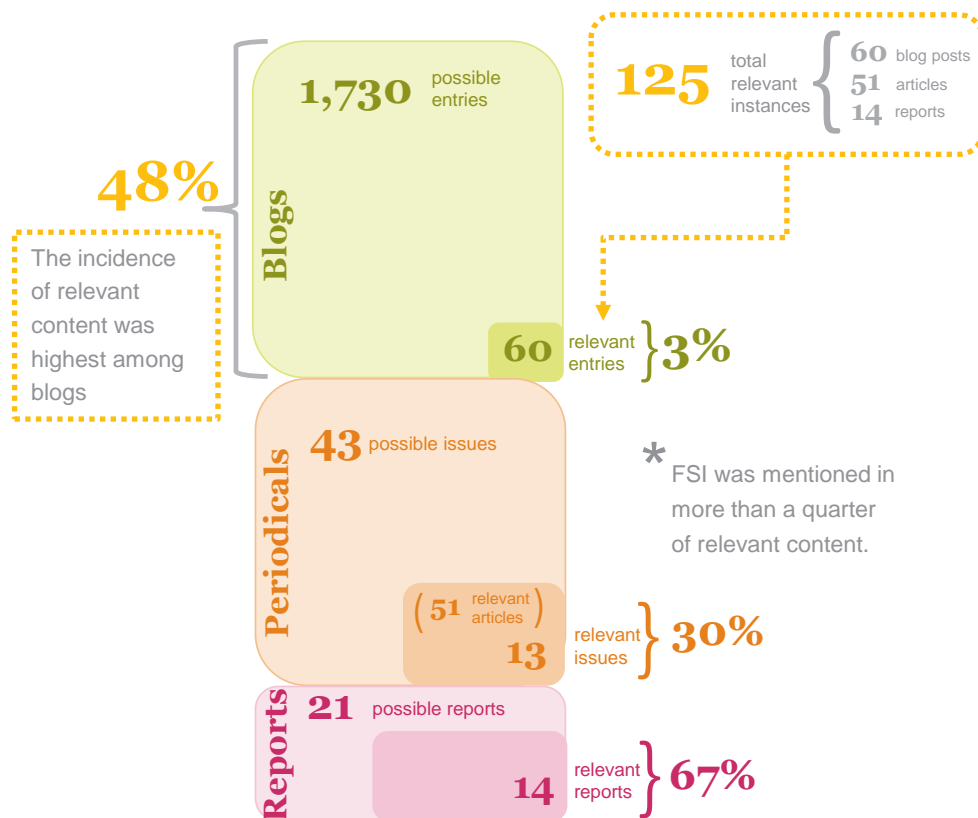
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[1] The first media analysis was conducted on blogs, periodicals, and reports from the year before Fund for Shared Insight launched (July 2013 to June 2014).

Key Findings

More chatter, more alignment

There were 125 instances of relevant "chatter" related to beneficiary feedback loops in the field between July 2014 and June 2015, compared to 90 instances the prior year. Though the proportions of relevant blogs and periodicals are relatively similar, a greater proportion of published reports had relevant content (36% relevant at baseline, 67% relevant at year one follow-up).

125 total relevant instances
- **60** blog posts
- **51** articles
- **14** reports

48% The incidence of relevant content was highest among blogs

Blogs
1,730 possible entries
60 relevant entries **} 3%**

Periodicals
43 possible issues
51 relevant articles
13 relevant issues **} 30%**

Reports
21 possible reports
14 relevant reports **} 67%**

* FSI was mentioned in more than a quarter of relevant content.

The uptick in chatter may be in part attributed to both Shared Insight's activities and the release of Center for Effective Philanthropy's report, *Hearing from Those We Seek to Help*. Of the 125 relevant instances, about one quarter (26%) mention Shared Insight[2] and about one fifth (22%) mention the Center for Effective Philanthropy report. Four instances mention both Shared Insight and the report.

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[2] Of the 125 instances, seven instances (6%) were announcements of Shared Insight (e.g., the announcement of the collaborative's existence, the RFP, and the selected grantees).

In addition to an increase in relevant content, the instances found were **more often aligned** with how Shared Insight talks about beneficiary feedback loops.

- Of the 125 instances found, about three fourths specifically discussed the collection of feedback from end beneficiaries (78%).

- There were 47 instances (38%) that referred to both systematic feedback[3] and closed loop feedback, where the foundation or nonprofit responds to and/or incorporates feedback, compared to less than one fifth of instances at baseline (17%).

- Though nearly three quarters (72%) of relevant content described foundations or nonprofits using feedback to inform a strategy change or making an adjustment to a program as a result of feedback, only 14% explicitly described communicating back to grantees and/or beneficiaries about the change that resulted from their feedback.

72% talked about
closed-loop feedback

38%
talked about both

42% talked about
systematic feedback
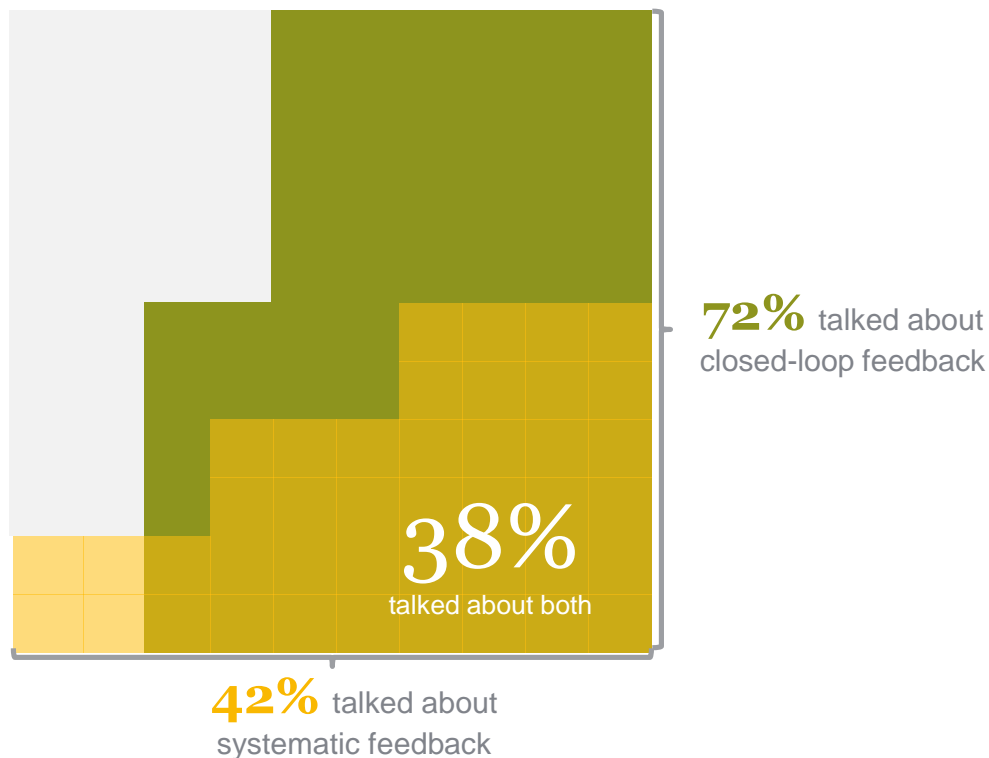
This year we did further analysis to better understand to whom beneficiary feedback was being directed. Of instances that discuss feedback from beneficiaries specifically, three quarters spoke of the opportunity for that feedback to inform nonprofits (75%) and almost two thirds (64%) to inform foundations.

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[3] About one tenth (9%) of references to "systematic" feedback were slightly more disjointed (e.g., "collected over the years," "can be embedded into a program").

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Similar venues, new voices

Compared to 2013–2014 data, we found that a similar set of places included relevant content. Three new venues emerged this year: Leap of Reason, Philanthropy News Digest, and Social Velocity. In this time period, Alliance Magazine published a special issue entirely focused on feedback loops, *Beyond accountability: Feedback as transformation.*

Compared to baseline, we found a slight increase in the number of authors with three or more instances—10 this year compared to eight at baseline. However, only three (i.e. Phil Buchanan, GEO, and FSG) were included in this list both years.

The following table lists the venues (blogs, periodicals) in which more than three instances of relevant content were found.

Table 1 | Venues

Blogs	Periodicals
• Alliance Magazine • Center for Effective Philanthropy • Chronicle of Philanthropy (articles only) • High Impact Philanthropy • Leap of Reason (Leap Updates newsletter) • Markets for Good (Total) • Philanthropy News Digest – PhilanTopic • Social Velocity (Nell Edgington) • Stanford Social Innovation Review (Total)	• Alliance Magazine • Chronicle of Philanthropy • Inside Philanthropy • Philanthropy News Digest (from Foundation Center) • Stanford Social Innovation Review • The Foundation Review

The table below lists the authors with three or more instances associated with their name[4]. Authors with an asterisk are connected to Shared Insight, either as core funders or grantees.

Table 2 | Voices

Authors
• Alliance Magazine
• *Center for Effective Philanthropy
o Ellie Buteau
o Ethan McCoy
o Phil Buchanan
o Ramya Gopal
• *David Bonbright, Keystone
• Debra E. Blum, Chronicle of Philanthropy contributor
• Grantmakers for Effective Organizations
• FSG
• Lowell Weiss, Cascade Philanthropy Advisors
• Mario Morino, Leap of Reason
• *Melinda Tuan, Fund for Shared Insight
• Philanthropy News Digest

Authors that had published three or more instances at baseline, but were not included above because they have not published as much in the past year include: Lucy Bernholz (1), Tris Lumley (1), Susan Wolf Ditkoff (0), and Suzanne Perry (2). Blogs and periodicals that had published three or more entries/articles at baseline, but have not published as much in the past year include Nonprofit Quarterly, Philanthropy 2173, and The Foundation Review.

Practice and advocating for use

Beyond describing feedback loops, we also wanted to understand the "tone" and degree to which the discourse could be useful in promoting practices in the field, either by describing actual feedback loop practices or by advocating its use.

The analysis found that more instances can be viewed as advocating for feedback practices this year. Compared to only a few instances of relevant content advocating for the use of beneficiary feedback at baseline (13%), more than one third of relevant content advocated for its use in the past year (37%).

We found similar amounts and types of discourse around beneficiary feedback practice. Half (50%) of the identified content described the actual practice of beneficiary feedback, similar to

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[4] Some blog entries did not have individual authors listed; in those instances, we considered the organization the author.

last year. Also similar to baseline, the instances of practice of feedback loops mostly focused on direct service areas, such as education (12 entries), international development (9), and youth/family nonprofit work (7).

We found slightly more discourse related to philanthropic practices for using beneficiary feedback. Twenty-four instances talked specifically about philanthropic practice, such as using beneficiary feedback for strategy development (39% of all examples of practice, compared to 30% at baseline). Of these instances, more than one third (9 instances) were voices connected to Shared Insight, either as core funders or grantees.

Evaluator Observations

- The amount and type of chatter is different since the year before the launch of the collaborative. Much of the uptick is related to conversation about Shared Insight and/or Center for Effective Philanthropy's report, *Hearing from Those We Seek to Help*. How does Shared Insight capitalize on this opportunity to ensure that the increased dialogue sustains beyond the initial excitement around its launch and the release of Center for Effective Philanthropy's report? Alternately, to what degree can new content continue to enhance the state of discourse in the field?

- We found that there were more instances in which funders were noted as a direct audience for beneficiary feedback (64%) than we expected. Is there a desirable way for beneficiary feedback to flow? Should the foundation collect it? Do feedback loops need to be mediated by grantees? How does Shared Insight want to message the practice of beneficiary feedback loops, particularly around foundation practices?

- There was a change in who is speaking about feedback loops. Is there an opportunity or desire to cultivate voices that have been lost since last year? Are the venues, which stayed largely similar, the right ones? Should others be cultivated?

Conclusion

One year into its work, Shared Insight is seeing slightly more content with greater alignment around beneficiary feedback loops. The uptick in discourse is connected to the collaborative's launch, but shows promise of taking off beyond Shared Insight's work. As Shared Insight adds more capacity in communications, it will be interesting to see what new trends emerge in future years.

Appendix A: Methodology

Same as at baseline, the media analysis involved reviewing the blogs, periodicals, and reports[5] listed below using the terms "beneficiary" / "constituent voice," "beneficiary" / "constituent feedback loops," and "beneficiary" / "constituent feedback." The incidence and source between July 2014 and June 2015 of search terms was recorded as well as analyzed for tone and alignment.

We reviewed blog posts from the following sources:

- Albert Ruesga in White Courtesy Telephone
- Arabella Advisors – Greater Good
- Beth Kanter
- Center for Effective Philanthropy
- Chronicle of Philanthropy
- FSG
- Give Well
- High Impact Philanthropy
- Independent Sector
- Kathleen P. Enright in Huffington Post
- Leap of Reason (Leap Updates newsletter)
- Philanthrofiles – posts by Andy Carroll mainly
- Philanthropy 2173 – Lucy Bernholz
- Philanthropy News Digest – PhilanTopic
- Social Velocity (Nell Edgington)
- Stanford Social Innovation Review
- Steven Mayer – Just Philanthropy

Traditional publications reviewed included the following periodicals:

- Alliance Magazine
- Chronicle of Philanthropy
- Inside Philanthropy
- Nonprofit Management and Leadership
- Nonprofit Quarterly
- Philanthropy Magazine (from Philanthropy Roundtable)
- Philanthropy News Digest (from Foundation Center)
- Stanford Social Innovation Review
- The Foundation Review
- The Nonprofit Times
- Blue Avocado

Reports published by the following key sector organizations were included in our analysis:

- Arabella
- Center for Effective Philanthropy
- FSG
- Grantmakers for Effective Organizations
- Markets for Good
- National Committee for Responsive Philanthropy
- Rockefeller Philanthropy Advisors

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[5] We did not review conferences during the media analysis because most conferences do not keep their conference agenda and/or blog posted once the conference is over.

Modifications to methodology since baseline

As our work with Shared Insight has evolved, our thinking has also become more nuanced. We clarified codes in the following three areas compared to baseline:

Frequency of feedback loops

Baseline. We lumped many instances into "systematic" frequency, including instances that alluded to something slightly more disjointed (e.g., "collected over the years," "can be embedded into a program").

Change in year one follow-up. Rather than lumping, we distinguished between regular, ongoing feedback loops and the more unclear references to "systematic" frequency mentioned above. Although those instances may be referring to what Shared Insight would call "systematic feedback," it was not made explicit.

Implication. The comparisons to baseline are still accurate, but the resulting findings are more nuanced because we were able to include a footnote about how many "systematic" feedback loops were more disjointed.

Direction of feedback loops

Baseline. We coded for "closed loop" feedback, meaning that a foundation or nonprofit used beneficiary feedback to inform strategy, made an adjustment to a program as a result of feedback, and/or circled back with beneficiaries about how their collected feedback was used.

Change in year one follow-up. This year we distinguished between "use" of feedback and "use plus communication" of feedback. Although beneficiaries may see a strategy change that takes into account their feedback, it seems useful to differentiate when a foundation or nonprofit explicitly circles back with beneficiaries or grantees about how their feedback was used.

Implication. As with frequency of feedback loops, this change did not affect our ability to make comparisons to baseline. It only made our findings more nuanced because we were able to share how many instances explicitly refer to "closing the loop" with grantees or beneficiaries.

Tone of instance

Baseline. Each instance was coded as either acknowledging beneficiary feedback loops, advocating for their use, and/or providing an example of feedback loops in practice. Relevant content that provided an example was only also coded as acknowledging or advocating if there was a tone beyond the example provided.

Change in year one follow-up. This year, we decided to code all examples of practice at least as "acknowledging," and possibly "advocating", if the author also encouraged their use.

Implication. In the baseline report when it says "nearly two thirds of relevant content acknowledged the value of beneficiary feedback," that number has been changed to all content at least acknowledged the value, and some advocated for their use and/or provided an example of feedback loops in practice. This change does not affect the comparison in the memo about how many instances advocate for the use of beneficiary feedback because the number of instances with an "advocating" tone has not been affected.

Strengths and limitations

The key strengths of repeating this media analysis are as follows:

- It provides a way to assess changes in public discourse of the sector through multiple media (blogs, periodicals, and reports) over time.

- The timeframe of one year should capture major sector events that would re-occur annually (e.g. conferences), as well as offer a comparable number of times for organizations to publish (e.g. organizations that publish on a quarterly basis).

- The consistent use of search teams and sources allows us to make comparisons from year to year within the sample.

Conversely, the primary limitation of the media analysis is:

- It is not exhaustive, in that it uses predetermined terms and sources. There are almost definitely additional instances of dialogue related to feedback loops that are not included in our analysis.

Nevertheless, we feel confident that the trends noted in the memo accurately reflect what is happening related to discourse in the field.