The Power of Feedback: Solving Wicked Problems through Listening and Learning

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creative solutions
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Feedback is All Around

The world is awash with constant, instant feedback. Opinions are shared widely and on-demand, when flights are delayed or restaurant service is poor. Thoughts, ideas, and even lifestyle choices on social media are shared in a nanosecond. With the proliferation of high-speed internet and low-cost mobile devices, the classic business mantra that “the customer is always right” has evolved into the far more demanding notion of “customer-centricity,” where products and services are built to be tailored to varying, individual needs. Whether they like it or

not, companies have come to embrace customer feedback and the most successful amongst them, such as Amazon and Facebook, have used it to build market dominance.[1]

Yet, as Wal-Mart collects over 2.5 petabytes of customer data per hour[2] and Yelp users post 26,380 reviews per minute,[3] Fay Twersky, the Director of the Effective Philanthropy Group, William and Flora Hewlett Foundation (Hewlett Foundation) points out that community voices "haven't yet broken though the glass ceiling of philanthropy."[4] This is not to suggest that big data and customer relationships are without significant failings in the business world, or that they are always transferable or appropriate for the social sector, but the social finance and social service community (the social sector) has not embraced the norm of seeking out and adapting to user feedback with quite the same fervor as a variety of other disciplines, ranging from social work and design thinking to manufacturing and politics.

According to a 2014 survey of US non-profits by the Center for Effective Philanthropy, 37 percent collect and use "beneficiary" feedback during the planning, implementation and reflection phases of their programs, and most believe that foundation funders "lack a deep understanding of their intended beneficiaries' needs."[5] This suggests an underappreciation for listening to community feedback, to say nothing of the quality or authenticity of this feedback, or the social sector's propensity to learn and share from it.

Twersky explains that for many, "Feedback takes too much time; it feels uncomfortable; it is another thing to do,"[6] and while customers drive revenues in the for-profit sector, money flows top-down in the non-profit world, leaving little direct incentive for funders and grantees to listen to community. Yet, as this brief will explain, it is perhaps precisely when solving the world's most Wicked Problems that community feedback, and cultures of listening and learning, are most crucial.

Wicked Problems

> *"…no paradigm is 'true'…including the one that sweetly shapes your own worldview…[it] is a tremendously limited understanding of an immense and amazing universe that is far beyond human comprehension"*
>
> *—Donella H. Meadows*[7]

It was Berkeley professors Horst W.J. Rittel and Melvin Webber who put forward the concept of Wicked Problems in the 1970s to describe "wickedly" complex social problems. Though the concept originated in the context of urban planning, it is now used widely by leaders of business and development. Wicked Problems are messy, systemic and large. Unlike problems in the natural sciences, they are ill-defined and do not have obvious or objective solutions. As Webber and Rittel put it, "Social problems are never solved. At best they are only re-solved—over and over again," and the decision on which solution to choose is necessarily subjective, and often political or moral.[8]

Scholars categorize problems as Critical, Tame, and Wicked. Critical problems require urgent attention and command-and-control leadership (the house is on fire). Tame problems (the road must be built) are best tackled by technical experts who have experience solving them many times over. Wicked Problems, on the other hand, have never been solved before and require adaptive leadership (climate change).

Rittel and Webber put forward ten characteristics to identify Wicked Problems:[9]

1. They have no definitive formulation.
2. They have no stopping rule, or are never completely solved.
3. Their solutions are not true-or-false, but good-or-bad.
4. The repercussions of a Wicked Problem's solution can never be fully appraised.
5. Every attempted solution counts significantly, leaving traces that cannot be undone.
6. They do not have an exhaustive set of potential solutions and it is not possible to prove that every solution has been identified and considered.
7. Each one is essentially unique.
8. Each one can be considered a symptom of another problem.
9. One's choice of explanation for a Wicked Problem determines the nature of the problem's resolution.
10. Those who attempt to solve them are held liable for the consequences of the actions they generate.

Therefore, by their very nature, Wicked Problems involve numerous stakeholders, each with different perspectives on the problem, its causes, and solutions. They cannot be solved by technical experts, particularly those who have not experienced them firsthand. Any attempted solution will fall short, and will require further improvement and iteration. This means that the diversity of voices brought to the table will determine how problems are defined and how their solutions are shaped. Who best to contribute to the discussion than the communities who live and tackle these problems every day? This is why Wicked Problems require adaptive or Deliberate Leadership, that creates cultures of listening and learning.

Deliberate Leadership

Deliberate Leadership is a response to the challenges of Wicked Problems, based on proven business and social sector theory and practice. The framework blends recognized adaptive leadership strategies that create lasting positive impact within the communities most affected by systemic challenges, and within the organizations trying to tackle them.

Deliberate Leaders must consistently display the following seven core characteristics (the 7Cs) to maximize learning and demonstrate flexibility:

- **Courage**—They embrace risk and live with ambiguity. Deliberate Leaders recognize that simple solutions are insufficient to address complex challenges. They also realize that risk is inherent to Wicked Problems: solutions must be tried, tested, and allowed to evolve.
- **Collaboration**—They seek out and listen to divergent viewpoints. Deliberate Leaders recognize that collaboration may be slow and uncomfortable, but is essential to understanding options, gaining new knowledge, and building powerful solutions.

- **Community**—They build solutions together from the ground up. Deliberate Leaders recognize that answers to tough issues may already reside in Positive Deviants.[10] They seek uncommon answers to difficult situations and put people at the center of decision making.
- **Candor**—They speak and hear the truth about what is working and what isn't. Deliberate Leaders embrace failure and success equally—internally and among partners—to manage risk and allow for recalibration and innovation.
- **Creativity**—They can imagine a new future and move beyond the constraints of the past. Deliberate Leaders look for "big ideas" and evolving practices through scenarios that envision a different future.
- **Capital**—They examine how financial and non-financial resources are invested and impact is analyzed.
- **Compassion**—They understand how deploying empathy and partnership, rather than ego, can positively impact the power dynamics within and surrounding an organization.

The 7Cs recognize that Wicked Problems call on philanthropic leadership to create, nurture, and continually reinforce an organizational culture dedicated to open and honest learning and adaptation, communication, and diverse stakeholder involvement. They also require social investors to let go of their perceived need to have the right or only answers and to control the process unilaterally.[11] Feedback and the inclusion of multiple, diverse voices allows leadership to operationalize the 7Cs and, as Donella Meadows would put it, gives leaders the "power to transcend paradigms"—what Meadows considers to be the most powerful lever of systemic change.[12]

Social Sector Frameworks for Community Feedback Loops

Promising practices and cautionary tales on feedback loops in the social sector are evolving through the funding and research efforts of organisations such as the Fund for Shared Insight, Feedback Labs, Keystone Accountability (Keystone), and the Center for Effective Philanthropy, and through the community engagement practices of innovative social enterprises around the world.

Dennis Whittle, the CEO of Feedback Labs, does not equivocate about why he believes it is essential to involve poor people in decisions that impact their lives. For Whittle, including community voice—especially for the most vulnerable—is "simply the morally right and smart thing to do." Whittle's moral compass is shaped by his top-down experience at the World Bank, where experts, not community partners, were paramount. After witnessing the negative consequences on communities of an experts-only approach, Whittle vowed to change the paradigm. He first co-created GlobalGiving, an online crowdfunding platform to democratize funding, and then established Feedback Labs to offer new ways to help decisionmakers—funders, social investors, social change organizations—put the people most in need at the center of social service decisions.[13]

David Bonbright, Co-founder and Executive Director of Keystone Accountability, is equally committed to bottom-up decisionmaking. As with Whittle, his belief is grounded in past experiences. In the case of Bonbright, he had witnessed firsthand the power of building from the

bottom up during South Africa's anti-apartheid movement. He found that people-to-people, community-to-community methodologies created a lasting model of equality. Whittle and Bonbright are among the growing number of nongovernmental organizations (NGOs) and social sector consultancies who believe in truth-telling and using tools derived from customer service and the technology sector, to capture local voices. At the center of their feedback loop models are real people with first-hand lived experience of the social services interventions designed to improve their lives.

Twersky believes that feedback is one of three legs of a stool for creating well-rounded learning organizations: "*Monitoring* allows for pulse taking; *evaluation* provides independent rigor on determining whether outcomes were achieved; and *feedback loops* allow for real-time learning and innovation."[14] This brief adds a fourth leg to the stool: *leadership*, which (as research and practice demonstrate) makes the commitment to learning that much stronger, stable, and entrenched in organizational culture and expectations. Without committed leadership, systemic learning does not happen.

Kathy Reich, the Director of the Ford Foundation's Building Institutions and Networks (BUILD) initiative, adds that learning, listening, and reflecting need to be part of the DNA of organizations—and for many organizations, they simply aren't: "Culture change is really hard," she says, "It's one of the toughest things that you can do." Reich is co-chair, with Twersky, of the Fund for Shared Insight, a collaboration of 39 funding partners with $14.5 million in allocated grants that is setting out to change the status quo by seeding research, fostering experimentation, and funding pilots to increase listening and learning among U.S. foundations, NGOs and their clients and constituents, as well as by promoting foundation openness and sharing.[15]

Brief Outline

This brief, supported by a grant from the Hewlett Foundation, was designed as a teaching tool for the Oxford Social Finance Programme, Saïd Business School, University of Oxford. This executive education program examines how big bets and bold ideas can help solve the world's most difficult challenges and promotes understanding of when and how community-based feedback can provide iterative learning that is critical to understanding impact. The brief and teaching module are designed to help executives understand how to incorporate bottom-up feedback loops into their social investing practice—and what works and what to avoid. The case will be shared globally through the Oxford Saïd Business School network.

This brief examines several questions:

- Why is feedback the "smart and right" thing to do?
- What are core elements of effective community-based feedback?
- If feedback is so smart and right, why isn't everyone doing it? What is getting in the way?
- What emerging promising practices are worth replicating, and what are some cautionary tales?
- How can social sector funders and their organizations make a commitment to listen-and-learn and walk-the-talk?

Content for this brief was shaped by desk research—a review of evaluations, articles, and other publications—and fifteen interviews with donor-members and grantees of the Fund for Shared Insight.[16] The brief provides illustrations of feedback models, drawing on protocols developed by Feedback Labs, Keystone Accountability, and Listen for Good—a grantmaking and benchmarking initiative of the Fund for Shared Insight.[17] It also elaborates on the Deliberate Leadership feedback methodology to help leaders working in social investing promote listening and learning cultures across the "value chain" of social change they support. Deliberate Leadership applies to all types of organizations but is particularly important for leaders in philanthropy and social finance organizations as a way to incorporate candor, compassion, and feedback into their organizations. Positive, systemic change to address the world's most complex challenges will not happen unless there is alignment and commitment at all levels from funders and intermediaries, and the people and communities they seek to serve.

The brief presents an overview of what tools exist and why they are important for social investors globally. Several common concerns emerged from the research: how can the power discrepancy between those who need services and those who have the financial resources to provide them be balanced? What new business models for securing customer feedback can be used and adapted by social finance and social services? What is the value proposition for foundations and social investors to listen and learn from direct community feedback? This brief will attempt to answer some of these questions through lessons from the field of social investing and philanthropy, but recognizes that the practice of deliberate use of feedback loops remains nascent in this arena.

I. Why is Feedback the “Smart and Right” Thing to Do? The Case for Listening, Learning, and Action

“If you’re not listening, you’re not learning”

—Lyndon B. Johnson[18]

Here are several reasons why, as Whittle puts it, enlisting community-based feedback is the “right thing to do and smart thing to do,” particularly when tackling wickedly complex problems.[19]

First, because it is Smart

Data indicates that when feedback loops are instituted well, they improve performance and outcomes. Speaking on Feedback Labs' case study work and empirical analyses, Whittle says that the orders of magnitude are striking:

> "When constituent voice, or feedback is listened to and acted on, you see improvements in outcomes of sometimes a quarter to a third. … Think about all the things we do to try to improve outcomes that peak out at a 1, or 2, or 3 percent increase. If feedback is done well in the right context it can have very, very major effects."

In their paper, *Is Feedback Smart?* Feedback Labs presents several examples where feedback has had a significant impact on outcomes.[20] In Uganda, a citizen report-card was administered to fifty rural districts to evaluate health facility performance data. The results were shared at facilitated sessions between users and providers, who collaborated to shape solutions and a plan of action. This resulted in a 16 percent increase in the use of health facilities and a 33 percent drop in child mortality under the age of five. Similarly, rural Ugandan schools that developed their own indicators to evaluate education-outcomes exhibited an 8.9 percent and 13.2 percent reduction in absenteeism among students and teachers, respectively. In comparison, schools whose evaluations were based on standard indicators (developed by experts) showed insignificant results.[21]

Whittle is quick to clarify that such examples should not be taken to mean that feedback always has a measurable, positive impact on outcomes. "It has to be done very well," he says. Nevertheless, the reasons why feedback leads to better results are not difficult to see, according to Feedback Labs. Feedback helps establish trust and lends legitimacy to initiatives, and it provides insights into local and current context that cannot be captured by aggregated data and formal written studies. These factors—trust, legitimacy and understanding local context—are essential to successful implementation.[22]

The second reason why community feedback is smart stems from countless examples of organisations going in to tackle seemingly unsolvable problems, only to find that local community members were far ahead of them. This observation forms the basis for the Positive Deviance movement, which posits that every community contains people whose uncommon but successful behaviors and strategies enable them to find superior solutions than do their peers facing the same challenges and resource constraints.[23] The movement gained momentum in 1991 when Jerry and Monique Sternin were given six months to pilot and scale an effective strategy to combat child malnutrition in Vietnam, where 65 percent of all children in villages were malnourished. Given the time pressure, the Sternins looked within village communities for ideas, and observed that certain children were well-nourished despite the scarcity of resources, due to the unusual practices of their caregivers. These practices, such as giving children frequent small meals of tiny shrimps and crabs easily collected from paddy fields, became pivotal to the Sternins' strategy.[24]

Finally, users of services and programs are constantly providing feedback whether it is requested or not, so it would be wasteful not to learn from the information. In big data terms, it is estimated that by 2020, 1.7 megabytes of data will be generated every second for every person

on Earth.[25] The potential behind this number is staggering, considering that no more than 0.5 percent of all data collected is currently being used.[26] Even by choosing to reject aid or a program, community members are providing a form of feedback.[27] Economist Albert Hirschman would call this feedback through “exit”, in contrast to the other dominant form of feedback through “voice”. Where alternatives to a particular service or product are in short supply, as is often the case in the social sector, exit ceases to be a viable option for users and so they are more likely to contribute feedback by voicing their concerns and suggestions.[28] This means that when a grassroots program is not working, community members may be more willing than the average consumer to tell a non-profit how and why—a tendency that the social sector should welcome.

Second, Because it is Right

“The first principle of aid is respect”

—Ernesto Sirolli[29]

In his TEDTalk, *Want to Help Someone? Shut Up and Listen!* Ernesto Sirolli makes the simple but often overlooked point that it is critically important to respect those people whose lives social investors seek to improve. Sirolli points out that aid workers tend to approach unfamiliar problems with an outlook that is, at best, paternalistic—“I treat anybody from a different culture as if they were my children”—and at worst, patronizing—“I treat anybody from a different culture as if they were my servants”.[30] True respect requires treating community members as equal partners in the quest to solve systemic challenges.

This is a fundamental tenet of the Deliberate Leadership framework, which starts with mapping out partners and stakeholders in an ecosystem, beginning with community at the center (see Figure 4).[31] It is also the view held by seminal thinkers like Amartya Sen and Jean Drèze, who would argue that development organisations who fail to consult with community members are depriving them of agency and their basic right to “unlock their innate abilities for self-determination.”[32] Sen’s work is the foundation for the work of thought leaders on feedback loops, like Keystone Accountability and Feedback Labs, who believe that “people should drive what affects them most”.[33] Viewed through this moral lens, even commonly used words like “beneficiary” seem inadequate when describing the role community members can play in problem solving. This brief prefers the terms “community,” “constituent,” or “participant” to describe those who are often referred to as “beneficiaries” in the social sector.

There are those like Twersky who believe that encouraging “agency” is often the right thing to do but find that it is frequently promoted in a generalized and overly simplistic manner. In some cases, it may not always be appropriate to expect community members to solve their own problems, and therefore agency should not be the chief driver for why feedback is sought.[34] In other cases, it is essential for funders to be informed by the communities they are seeking to help but it it unrealistic to expect funding agencies to hand over decisionmaking in a wholesale way to people and communities. This is a fair criticism, particularly in the case of extremely vulnerable communities that may be starved of the resources or capacity to present solutions. Even so, Twersky and other proponents of this view would still say that organisations have a moral responsibility to consult with community members—at the very least to ensure that programs and services are working for them and to identify opportunitites for improvement and

innovation. “We should listen to the people we're trying to serve because that's ethical and moral,” says Whittle, “and in a philosophical sense they are the ones who should be the ultimate arbiters of what it takes to make their lives better, and whether their lives are getting better.”[35]

Several interviewees cited moral reasons for listening to community feedback. For instance, Elena Marks, President of the faith-based Episcopal Health Foundation says their decision to co-fund feedback loops with the Fund for Shared Insight was, “a value statement of the belief that we should do things with people, not to them or for them. That's just the core philosophy that we have as a matter of respect for people that we work with no matter who they are.” Reich describes listening to community feedback as a form of “valuing their lived experience.” For Roy Steiner, Senior Director of the Omidyar Network, the argument is both moral and practical:

> “It's our basic belief that we're here to serve the people that we're delivering products and services to and their voices matter…If we believe in empowered individuals, we should be listening to them and trying to understand what their concerns and questions are. It's a philosophical approach, but also very practical. We just don't see that you can have a successful business or non-profit without really understanding who you're serving.”

II. Core Elements of Effective Community-Based Feedback

Terminology and Frameworks

Before delving into feedback loop frameworks that have been developed for the social sector, it is important to establish what feedback loops are. However, thought leaders admit that there is a problematic lack of consensus on definitions and terminology in the field. Laura Jump pointed this out in a 2013 landscape review, where she stated that the lack of standardization of terms leads to "confusion of purpose, ideas, and hence conclusions."[36] Valerie Threlfall, the Project Lead on Listen for Good and consultant on social sector feedback loops, reiterated this concern in the same year, specifically calling out the lack of precise and consistent definitions around who to seek feedback from and how often.[37] A range of terms exist to describe the people and organizations that feedback ought to be sought from—"constituents," "beneficiaries," "clients," "citizens," "participants," and "community," to name a few.[38] There is a similar proliferation of terms to capture the acts of listening and learning, and the types of information collected. These include the terms "input" and "feedback,"[39] "direct" and "indirect constituent voice,"[40] "open" and "closed feedback loops,"[41] and "perceptual" and "behavioral feedback."[42] Even as listening practices have become more widespread, consensus on terminology has not emerged over the years. More recent publications such as Feedback Labs' *Is Feedback Smart?*[43] in 2016 and Threlfall's *Perceptual Feedback*[44] in 2017 continue to stress the need for a shared understanding of terms.

This brief draws into focus the definitions and terms used in three influential feedback loop frameworks—Keystone Accountability's Constituent Voice Methodology, Feedback Labs' closed feedback loop and Deliberate Leadership's learning process. All three frameworks are strikingly similar in several important respects:

- **Securing buy-in.** Ensuring that community members are convinced of the need for, purpose of, and value proposition behind feedback loop mechanisms.
- **Capturing numbers and nuance.** Ensuring that continuous, light-touch, data-driven collection methods like tech-enabled surveys are combined with occasional, in-depth qualitative methods like storytelling, so that both the numbers and nuance in feedback are captured.
- **Closing the loop.** Ensuring that feedback is not just collected and analyzed, but reflected and acted upon.
- **Maintaining two-way dialogue.** Ensuring that channels of communication remain open between organizations and community throughout each iteration of a feedback loop.

It is noteworthy that closing the loop and maintaining two-way dialogue can have the useful side effect of cultivating community buy-in. Aside from these similarities, the three frameworks exhibit key differences in terminology, approach and application that require further elaboration.

Keystone Accountability and the Constituent Voice Methodology

Keystone uses the term "constituents" to describe the various groups an organization "has a degree of moral or legal obligation to listen [to] and engage with."[45] First and foremost, this includes the communities that an organisation seeks to help, who are the primary focus of its mission. Keystone categorizes these communities as "**primary constituents**," who deserve attention before every other type of constituent. Other constituents are categorized based on how directly they contribute to, or are affected by an organization's activities. As per this classification, Keystone sees staff, funders, and partner organizations as direct constituents, and board members, government and other community organizations as indirect constituents.[46] This sorting system runs the risk of overlap and subjective interpretation based on the context of each organization. For instance, government and community organizations may often be partner organizations, or boards may be viewed as exerting strong and direct influence on programs. Nevertheless, the system helps address the practical matter of prioritizing across numerous constituent groups.

Once constituents are identified and prioritized, Keystone believes that organizations must cultivate "**Constituent Voice**." The concept of Constituent Voice is underpinned primarily by Sen and Drèze's theory of agency,[47] and Hirschman's theories of exit, voice and loyalty.[48] It also draws on participatory development techniques from the field of social work, and the customer service practices that emerged during consumer rights movements in the 1950s.[49]

According to Keystone, the mere collection of feedback does not enable Constituent Voice. Constituent Voice emerges by following every step in an operational cycle called the "**Hirschman Voice Cycle**" (see Figure 1). As Figure 1 illustrates, the Hirschman Voice Cycle moves through the stages of design, collection, analysis, dialogue and course-correction. Keystone's *Constituent Voice Technical Note 1*[50] elaborates in detail on the purpose, requirements, applications and challenges of each stage, and its *Feedback Commons*[51] database provides online tools and tutorials to assist with designing and operationalizing the cycle. The Hirschman Voice Cycle can be applied at different phases in an organization or program's life cycle, whether to test a theory of change during the planning phase, or evaluate the performance of a program post hoc.[52]

Figure 1. The Hirschman Voice Cycle[53]

Feedback Labs and the Closed Feedback Loop

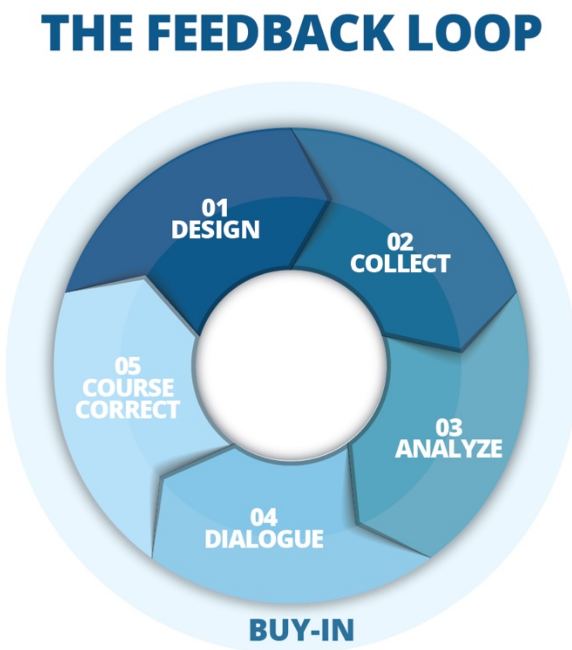
Feedback Labs acknowledges that its methodology draws heavily on Keystone's Constituent Voice Methodology, with some important modifications. According to Whittle, social sector feedback loops are "mechanisms that allow regular citizens to influence both the selection and quality of development initiatives implemented by aid providers and government agencies."[54] The Feedback Labs methodology prioritizes those being served by social sector programs as the only stakeholders from whom feedback is solicited.[55] Therefore, where the methodology refers to "**constituents**," it includes only "primary constituents" as per Keystone's terminology. It also uses "**feedback**" in place of what Keystone refers to as Constituent Voice.

Figure 2 illustrates the steps in Feedback Labs' "**Closed Feedback Loop**," which follow closely the design, collect, analyze, dialogue and course-correct stages in the Hirschman Voice Cycle. Feedback Labs adds to this cycle by encapsulating the entire system within a larger circle labelled "buy-in," which is described as a "preparatory step" that must be deliberately and continuously cultivated during each step in the closed feedback loop.[56] While the closed

feedback loop only sees one category of constituents, it emphasizes that three types of buy-in are required from three key stakeholders:

- **Decision-makers** must be committed to act upon feedback. Brad Dudding, the Chief Operating Officer of the **Center for Employment Opportunity** (CEO) illustrated this type of buy-in when he described feeling "giddy" with excitement when CEO received a low net promoter score amidst predominantly courteous feedback. Instead of feeling discouraged about the review he thought, "Hey, we got a low score—we can do something about it!"[57]
- **Frontline staff** must be committed to listen for and report on constituent feedback during program implementation. **The Boys and Girls Club of the Peninsula** seeks to help low-income youth in America succeed at school. They noticed low student survey response rates because teachers were not invested in the process of collecting and reporting feedback. To overcome this, the organization involved teachers in the process of survey design, giving them a sense of ownership over the exercise.[58]
- **Constituents** (as per Feedback Labs' terminology) must want to give feedback and "have an appetite for accountability."[59] The power dynamics between non-profits and constituents can often leave the latter with the impression that providing candid feedback is impermissible or futile. **Participatory Rural Appraisal** is a social work methodology that employs various techniques to rebalance the power dynamic between external experts and rural constituents. Community members map out a problem together and each take turns to "hold the stick" and share their viewpoints. This simple act has been found to encourage more lively debate and discussion, since community members feel a sense of authority and control.[60]

Figure 2. The Closed Feedback Loop[61]



The Feedback Labs website provides a diagnostic quiz titled *How strong is your feedback loop?*[62] which is tailormade for social sector organisations across the value chain to assess the strengths and weaknesses of their existing feedback loops. The quiz itself is a working illustration of how to apply the closed feedback loop framework, and the questions and answers provide respondents an array of issues and options to consider. The quiz ends with a database of resources and best practices that can be filtered by resource type (tool, guide, example), stage of the closed feedback loop (buy-in, design, collect, analyze, dialogue, course-correct), sector, region, language, platform and cost.[63]

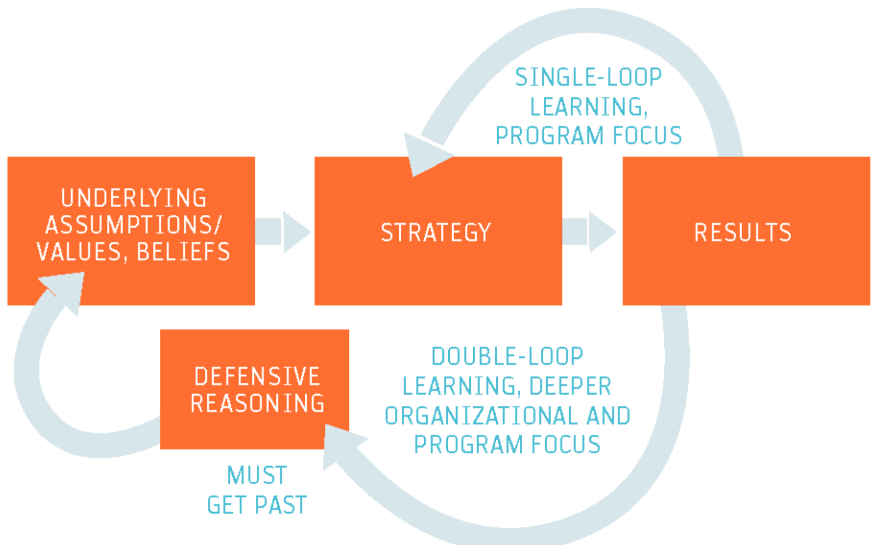
Deliberate Leadership and the Learning Process

Deliberate Leadership's articulation of feedback is anchored in systems theory, which was developed by the biologist Ludwig von Bertalanffy in the 1930s.[64] Systems theory takes an interdisciplinary and holistic approach to problem-solving. In this context, a "**feedback mechanism**" is an information system that can determine whether the outputs of a system are what they ought to be, and that they can be used to adjust inputs and processes in order to improve outputs and ensure that they are closer to intended goals.[65] According to Threlfall, it is easy to confuse "input" information collected to design new programs and theories of change, with "feedback." Per the *Perceptual Feedback* paper, she states that feedback can only be said to exist between two parts or groups when they interact with and affect each other.[66]

Ideally, feedback mechanisms ought to create systems that are self-regulating. This can be achieved by following what Chris Argyris describes as "**double-loop learning**"—i.e. not merely

adjusting strategy implementation based on feedback results, but instituting processes that overcome defensive reasoning to question and criticize underlying organizational and programmatic assumptions, values and beliefs (see Figure 3).[67] Argyris provides the illustration of a self-regulating thermostat that not only begins to heat a room when temperatures drop below 68°F, but can question whether 68°F is the appropriate setting in the first place.[68]

Figure 3. Double-loop Learning



Deliberate Leadership solicits feedback from internal and external "**communities**." Internal communities include everyone from leaders to frontline staff within an organization. External communities include the communities that an organization seeks to help, and the peer organizations that exist within its ecosystem. **Lamisi's Circle** in Figure 4, provides a framework for mapping external communities.

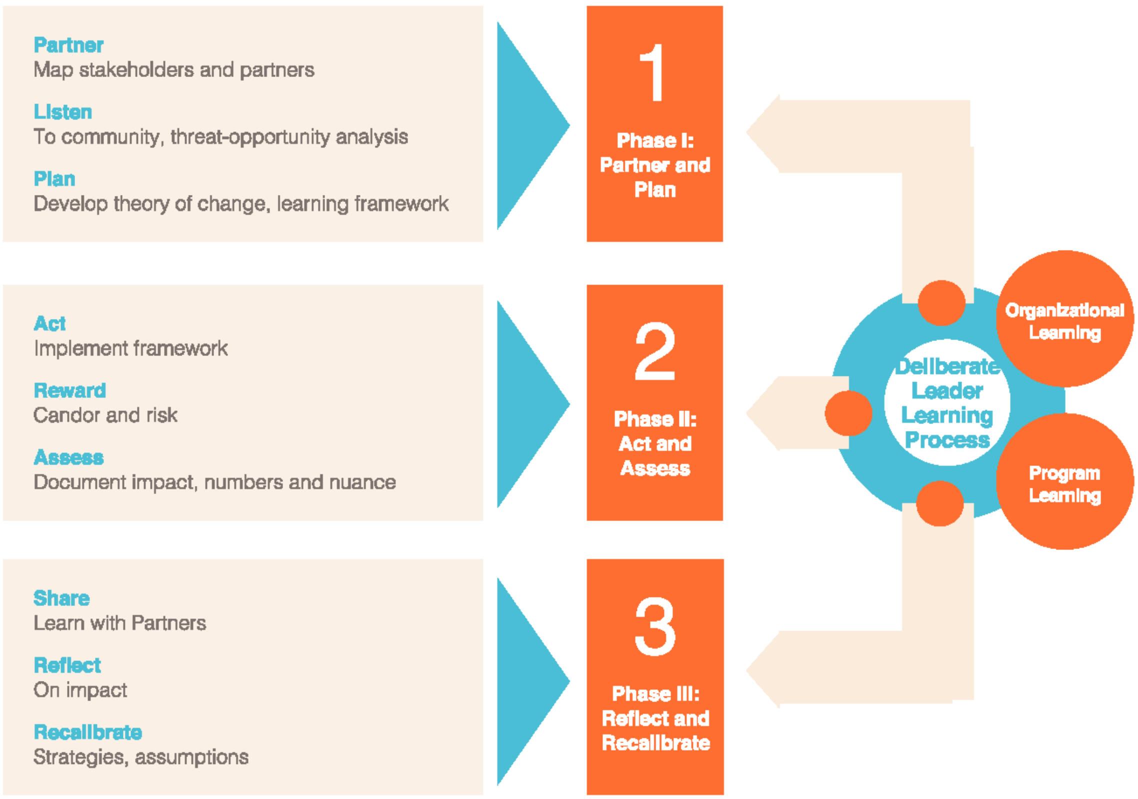
It is an illustrative example that visualizes the ecosystem around Lamisi—a young woman in rural Ghana. It is critical to note that Lamisi must sit at the center of this circle. While mapping out the external community around her, particularly peer organisations and community groups, systems thinking requires taking into account interconnected issues that relate to core organizational mission. For example, if the organization's mission is to educate adolescent girls in rural Ghana, this also requires ensuring that such girls are healthy and physically safe enough to learn. Therefore, the peer organisations and community groups who provide nutritious food or safe structures to Lamisi become indirect but relevant constituents, to borrow from Keystone's terminology. Lamisi's circle uses the UN Human Security Framework to map out such partners across the eight themes: personal security, economic security, community security, environment security, education security, food security, political security and health security. Though the number and variety of community members might be overwhelming, the exercise of mapping them out is useful in itself to reveal connections and interrelationships across an organization's network and reduces the likelihood of creating blind spots in one's

understanding of the ecosystem. Additionally, Lamisi's Circle is useful for mapping out how different direct and indirect constituents are related to one another.

Figure 4. Lamisi's Circle

Finally, Deliberate Leadership follows a closed-loop "**learning process**," across three phases described as Partner and Plan, Act and Assess, and Reflect and Recalibrate (see Figure 5). These appear to closely resemble the six steps in Feedback Labs' closed feedback loop, i.e. buy-in and design, collect and analyze, and dialogue and course-correct respectively. However, it is important to note that while the Feedback Labs' framework describes steps in discrete feedback loops, the framework in Figure 5 describes the phases across the lifecycle of an organization or program as a whole.

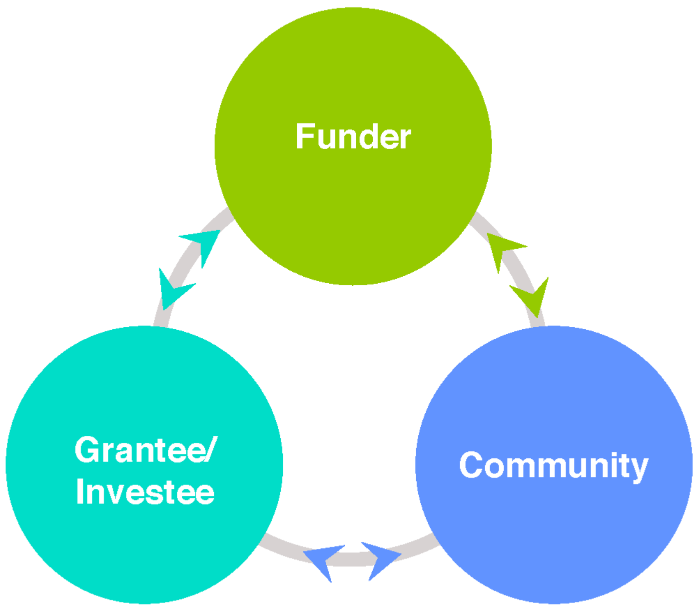
Figure 5. The Deliberate Leader Learning Process



III. If Community Feedback is So Right and So Smart, Why Doesn't Everyone Do It?

If the case for feedback loops is so glaringly obvious, the question begs to be asked—why haven't more social sector organizations adopted them already? Or as Twersky puts it, "Why don't we place greater value on the voices of those we seek to help? Why don't we routinely listen to our most important constituents?"[69] This is a question that requires answers across the value chain in the social sector, from funder, to intervening grantee or investee organization, to community, and back again (see Figure 6).

Figure 6. Desired Information Flow Across the Social Sector Value Chain

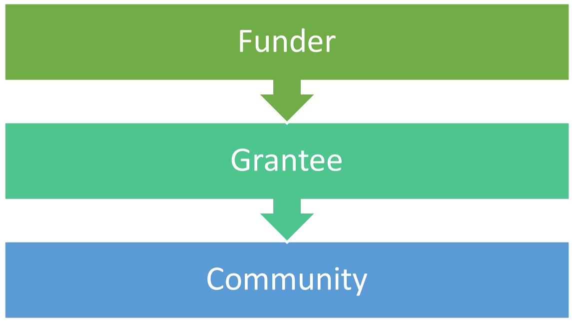


Funder-Grantee Dialogue

Capital Flow and Power Dynamics

While Figure 6 above illustrates the desired, two-way flow of information between each stakeholder in the social sector value chain, information tends to trickle down as depicted in Figure 7 instead. Figure 7 illustrates the predominantly top-down flow of capital and corresponding power hierarchy in the social sector, particularly from foundations to non-profits and the communities they seek to serve.

Figure 7. Social Sector Capital Flow and Power Dynamics



While placing customers on a pedestal in the for-profit sector can be intuitive when they drive revenues, financial incentives in social finance pull upwards in the opposite direction, with the result that institutional funders usually have the loudest say on programmatic priorities at the grantee level. Even grantee organizations that aim to place community needs at the center of their work can find themselves readjusting focus to align with the latest funding objectives of foundations. Linda Baker, Director of Organizational Effectiveness for the David and Lucile Packard Foundation, believes that foundations must be careful about how they utilize this power over grantees:

> "This is the inevitable power dynamic when money is involved in the conversation and one party has money, and one party needs money. Even though we know that the foundation can accomplish nothing without the work of the folks on the ground, there aren't enough resources to fund everybody and so there comes into play a power dynamic where if the foundation asks you a question … there's a power imbalance."

Given this dynamic, funders must make a proactive commitment to listening and learning, as the Fund for Shared Insight strives to do, in order for constituent feedback to become a priority within the social sector. Three years into their work, the Fund for Shared Insight reports that, while they are on track to meet their targets for the uptake of feedback practices by non-profit programs, there is still insufficient evidence to indicate greater prioritization of listening and sharing by foundations.[70]

Expert Culture and the Learning Dilemma

It is not unusual in philanthropy for foundations to favor an academic culture, and the viewpoints of experts and scholars. According to Bonbright, "absent remedial measures, philanthropy today defaults to a downward compliance, upward accountability model."

To Reich, this expert culture is partially a question of hiring for skillsets "that do not prioritize really deep listening and understanding of communities." The tendency in some foundations is to hire "content experts, people who have deeply studied and advanced very far in their careers," like scholars, professionals, and lawyers. She believes there is a need to also hire anthropologists, behavioral scientists, ethnographers, data scientists, marketers and others who have been trained, "to really deeply listen to and understand people and communities."

In *Teaching Smart People How to Learn*,[71] Argyris takes the view that the successes and trainings of smart professionals can reinforce cognitive rules of reasoning that avoid learning: "Professionals embody the learning dilemma: they are enthusiastic about continuous improvement—and are often the biggest obstacle to its success." He argues that these problems with learning stem from professionals' own success in education, which leaves them with little experience at responding to failure. In *Why Organizations Don't Learn* Francesca Gino and Bradley Staats take a similar view that organizational culture often displays a bias towards and "pre-occupation" with success, due to a fear of failure and a fixed mindset. They argue that leadership must actively "destigmatize failure" to overcome this bias, which gets reinforced further down the value chain.[72]

Grantee-Community Dialogue

Bias to Action

When one hears statistics on poverty and climate change, it is difficult not to view them as urgent problems that require immediate action through command-and-control leadership, rather than time consuming, multi-stakeholder dialogue and analysis. This "bias toward action" is one of the fundamental reasons why organizations do not learn, according to Gino and Staats.[73] It usually leads to exhaustion and does not leave time for reflection. Yet, even the U.S. Army—where command-and-control leadership is necessary and problems are urgent—conducts after-action reviews (AARs). At an AAR, a person other than the project leader facilitates an honest conversation with officers by comparing what actually happened in a scenario, with what could or should have happened to ensure that mistakes are not repeated.[74]

Inculcating learning and reflection requires organisations to deliberately carve out time, set up mechanisms for it and start early. MIT scholar and leading strategist Peter Senge states that the modern organization exists in an environment of such rapid and complex change, that the only way to adapt to such perpetual complexity is to cultivate each individual's ability to learn at all levels of the organization.[75] Silicon Valley makes an attempt at this by adopting "fail fast, fail better" mentalities, but these may not always be appropriate for the social sector while addressing basic human rights concerns, where the stakes are high and failure has irreversible consequences. There is a need for the social sector to find a balance between acting and achieving tangible outcomes, and making room for iterative and honest learning.

Fear of Sharing and Addressing Failures

A common interview theme showed that despite the bias to action, cultures of soliciting community feedback are gaining prevalence at the grantee level compared to the funder level. However, grantees who seek community feedback often find negative feedback difficult to learn from, and even more difficult to share. Given social sector power dynamics, the fear of failure and preoccupation with success at the funder level trickles down to the grantee level where it gets reinforced. This means that grantees experience a similar "doom loop" when faced with failure and are often afraid to report negative community feedback to funders.

In an interview for this brief, Steiner spoke of an African solar entrepreneur who was brought to tears by community feedback that revealed the discontent surrounding his product. Though he had frontline workers reporting to him about ground conditions, it took a tech-enabled solution—

Acumen's Lean Data technology—to bring authentic community voice to him, after which he took corrective steps. While such assessments can be difficult to receive, they often provide leaders with the proof they were waiting for to take action. As Steiner explains, it is not often that a leader will be completely surprised by how their constituents are feeling, but the data gives them the green light to address something that was previously just a hunch.

Even more challenging than receiving negative feedback is receiving feedback that cannot be addressed, or that creates tensions with other constituents like staff or funders. Twersky raises the example of a non-profit service provider that received negative feedback over its hours of operation. Addressing this issue would either require extending office hours, which staff would not be happy about, or hiring more staff, which funders were not prepared to support. It can be difficult to reconcile these differences and it will not always be possible for community voice to win. In such situations, Dudding recommends dialogue with constituents as soon as possible to honestly explain the circumstances.

Faulty Feedback Loops

An organisation may have reasons to mistakenly believe that it already has robust feedback loops in place. Monitoring and evaluation activities, ad hoc site visits, and outcomes measurement workshops can often look and feel like listening and learning from feedback. The key difference is that, while monitoring and evaluation are assessments based on the priorities of funders, managers and independent experts, feedback prioritizes the voices of stakeholders who lack formal authority, like community members and junior staff.

A more insidious concern is that even when organisations set up feedback loops that are separate from monitoring and evaluation efforts, these loops are often faulty. This may be due to a lack of tools or knowledge to solicit feedback in a routine manner that is "reliable, rigorous and useful."[76] Site visits may not be a systematic method of collecting data, surveys may be of poor quality, information may be difficult to interpret without benchmarks and, most commonly, organisations may not have completed the crucial step of closing the loop by acting on and sharing the feedback they collect.[77] Certain concerns may be heightened in the social sector, such as language and literacy barriers, or hyper-localized cultural sensitivities. In a later section, this brief attempts to address some of these issues by pointing to promising illustrations and cautionary tales observed in the field.

It is important to reinforce the point that feedback loop practices will only yield results if implemented through appropriate leadership and organizational culture. Leadership determines whether the right questions are asked, whether survey respondents feel comfortable about providing candid responses, and how the feedback collected is used and reconciled with competing priorities from other stakeholders.

Community-Funder Dialogue

Unclear Value Proposition

Of the three streams of communication in Figure 6, direct community-funder communication is undoubtedly the weakest. In her landscape review of the field, Threlfall states that "the value proposition for foundations learning from beneficiary feedback [through organizational feedback exercises] is still unclear," and therefore she sees "a lack of efforts at the funder level to

systematically incorporate and learn from beneficiaries’ perspectives.” Bonbright holds a similar view: “There has to be a proposition for the foundations, because they're of this world and they're either part of the solution or they're part of the problem. So, it's up to us to show them what that value proposition is. It is worth noting that after decades of trying to get donors to understand this, the dean of participatory methodologies, Robert Chambers, came to the view that immersion experiences for funders were a necessary part of the solution.”

While there may not be a direct, blatant value proposition to funders soliciting community feedback, Reich describes feeling mystified that foundations—particularly those that originate from corporate structures—fail to recognize the underlying need to understand the communities they seek to serve:

> “If you have a mission to change the world in some way, to help solve Wicked Problems, it's pretty impossible to fulfill that mission if you are completely disconnected from the people that you are trying to serve. The business analogy would be that you've got to understand your customer. You've got to understand your client.”

There appears to be an underlying assumption that community feedback will reach foundations through grantees. However, it is clear that prevailing power dynamics and the entrenched fear of sharing failures prevent honest feedback from being reported back to foundations, leading funders to lose access to crucial knowledge on the effectiveness of their dollars on the ground.

IV. Emerging Practices Worth Replicating, and Cautionary Tales

Interviews and research for this brief unearthed countless examples of social sector organizations that are making deliberate efforts to create and implement strong community feedback loops. Since the field is still emerging and greatly dependent on local context, it may not be appropriate to point to any organization's methodologies as best practice, however certain social service providers have exhibited a strong commitment to getting it right, and have been candid about sharing results. This brief focuses on two of them—the Center for Employment Opportunities in the United States and the Diva Centres of urban Zambia. It also discusses one example of direct community-funder dialogue—the James Irvine Foundation's community listening sessions.

Center for Employment Opportunities

CEO is a US non-profit that is "dedicated to providing immediate, effective and comprehensive employment services to men and women with recent criminal convictions."[78] Its theory of change argues that if the employment needs of its participants are addressed at the most vulnerable point of first release from incarceration (or right after conviction), then providing life skills education, short-term paid transitional employment, full-time job placement and post-placement support will reduce the likelihood of them being reincarcerated and will strengthen the chances of a stable, productive life for them and their families.[79]

CEO is a grantee of the Fund for Shared Insight and a follower and champion of the fund's Listen for Good semi-standard survey. Listen for Good focuses on "applying a semi-standard survey instrument, which includes the Net Promoter System employed widely in customer feedback circles, to the non-profit beneficiary context."[80] The feedback loops at CEO apply Feedback Labs' closed feedback loop framework, according to Dudding.

Buy-In and Design

When CEO first began to think about community feedback loops, Dudding says they approached it as a data-generating mechanism to prove and improve upon intended outcomes. "I think we got a little ahead of ourselves there," he says. Apart from the fact that it takes time to generate enough data to begin making correlations, Dudding believes that the message that feedback is all about improvement and assessments made it difficult to secure buy-in from staff and participants, who feared the consequences of poor performance.

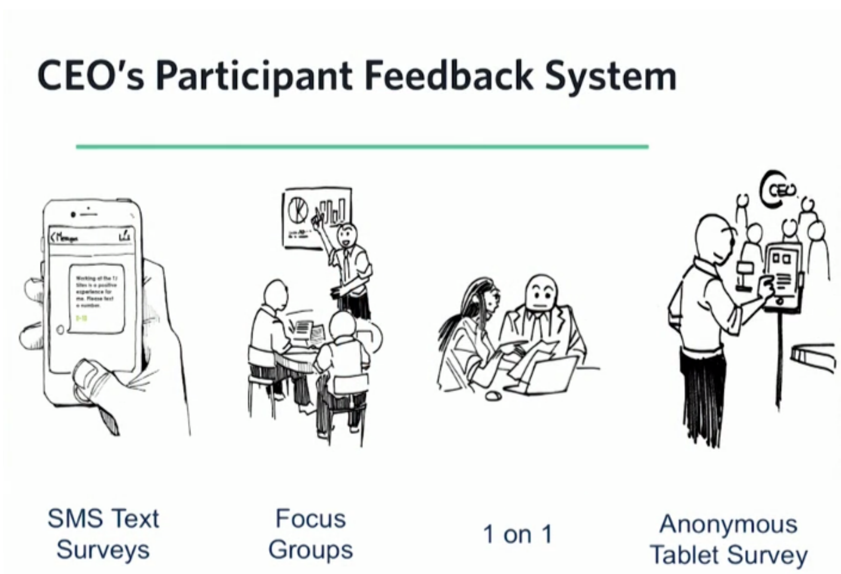
According to him, the "challenge of trust" and "fear of compassion" are deep-seated amongst CEO's staff and participants, who often "feel like they aren't in the driver's seat." Dudding explains, "We have men and women that are being released from prison, don't have a lot of resources when they come out. They're on parole. The threat of doing something wrong and being violated or sent back to prison by their parole officer is very real. We see it all the time, there's a lot of fear." Given this context, feedback mechanisms intended to monitor performance and outcomes made staff and participants wary. Therefore, CEO soon reoriented its approach from one of data and outcomes, to one of values, and found that this increased participant

responses and staff attitude. “Coming at this from a values perspective, I think was the right way to go instead of a data perspective,” says Dudding, “We’re going to use it as a way to make sure that the voices of our constituents matter the most. They’re not sitting in a caboose of their journey here, they’re on the train, and at times they might even be in the engine room.”

Collect and Analyze

CEO is an example of an organisation that uses mixed feedback collection methods strategically (see Figure 8). An SMS text survey goes out automatically two hours after a participant meets with a job developer. It provides primarily perceptual feedback[81] on what a participant thinks and feels right after a meeting. Focus groups are conducted twice a month and allow the organisation to have deeper conversations and ask participants open ended questions. CEO also uses the opportunity to test out new questions and observe participants’ reactions. One-on-one sessions occur weekly after case interview sessions, where staff are encouraged to actively engage and listen. They write up a case note at the end of each session and information marked #feedback is aggregated over time. Staff who share #feedback are given the opportunity to win a lottery prize. Finally, the anonymous tablet survey based on the Listen for Good questionnaire helped CEO identify strong courtesy bias in their non-anonymous feedback. Courtesy bias is the tendency of respondents to provide overly positive feedback out of courtesy, or because they worry about the consequences of negative feedback. It can be reduced by administering surveys through independent agents, or collecting anonymous feedback, but it ultimately requires cultivating a culture of honesty and humility about failures and negative feedback.[82] By comparing the anonymous and non-anonymous channels, CEO could track courtesy bias and take measures to reduce it.

Figure 8. CEO’s Participant Feedback System[83]



Dudding admits that courtesy bias is still evident in their data, and sees this as a signal that they have more work to do to make participants feel safe about speaking up. Looking back, Dudding wishes that the organization had started on methods such as focus groups and motivational

interviewing earlier, instead of waiting to develop systematic and automated technological solutions. “I wish I had jumped in sooner and just done focus groups, where myself and other leaders and staff are having conversations with participants about how we can help them more,” he says.

Dialogue and Course-correct

Closing the loop with participants has been critical and challenging for CEO, especially at their busy New York office which serves 2,000 people a year. “In any adaptive learning environment, it does take the support of leadership,” says Dudding, “There is a county director, a mini executive director in each one of those offices and it’s really important that that person is reinforcing, learning through dialogue and debate, and creating time for reflection.”

CEO uses various methods to close the loop with participants. Dudding often gives the example of Luis—a participant who gave the organization a low rating through its SMS channel, after he spent an entire day at the center dressed for a job interview that never came. Luis left discouraged and considered dropping out. It is CEO protocol to follow up on every instance where they receive a rating below six out of ten, so Luis received a call from a customer advocate and was sent on an interview the following week that he successfully converted into a job. Luis says that the simple act of a follow-up call made him feel, “Ok, these people care.”[84]

Dudding recognizes that not every case like Luis’ can be addressed by a one-on-one follow-up conversation. CEO explores other more scalable, but less personal methods of closing the loop. For instance, the #feedback mechanism is a way to flag concerns for senior leadership to review on a monthly basis. They also use screens in shared spaces to post responses to anonymous feedback.

Dudding acknowledges that it is not always possible to satisfy feedback requests. Certain requests have been feasible and responded to, such as a simple one to start classes later in the mornings. Other requests may not be addressable. In these situations, Dudding advises his staff to at least have an honest and empathetic conversation with participants in real-time.

To Dudding, dialogue and course-correction are primarily about asking two questions, “Is our program helping [participants] get it right? If not, what should we do differently?” Adjusting and mixing collection and implementation strategies has made a difference, but it took double-loop learning to effectively answer the second question, and pivot from a data-based paradigm on feedback to a values-based paradigm.

The Diva Centres of Zambia

While CEO’s feedback practices are anchored primarily in the Keystone and Feedback Labs frameworks developed for the social sector, the Diva Centres of Zambia are an example of the benefits and challenges of applying a feedback practice from the business world—human-centered design (HCD)—to the Wicked Problem of teenage reproductive health in Zambia. The brainchild of IDEO.org, Marie Stopes Zambia (MSZ), and the Hewlett Foundation, the Diva Centres highlight what can happen when the varying ideologies and practices of Silicon Valley, the Zambian arm of an international non-profit service provider, a U.S. foundation and the communities of Lusaka collide and evolve together. They are also a working illustration of why independent evaluation and feedback practices are two very different legs of the stool, as

Twersky posits. The initiative, which was centered around the feedback of teenage girls in Lusaka, has undergone a preliminary evaluation by Itad, whose initial findings bring additional perspectives to the story.

The Zambian Context and Origins of the Divine Divas

The Diva Centres emerged from an observation of Marie Stopes Zambia about the lack of teenage patients at their family planning clinics, despite high national figures on teenage pregnancy. According to UNFPA and the Zambian government's 2013-14 data, 28.5 percent of Zambian teens aged 15-19 become pregnant or have had their first child, but girls of this age group made up only 7 percent of Marie Stopes Zambia's clients.[85] They brought this observation to one of their long-time funders, the Hewlett Foundation, who assisted MSZ in involving IDEO.org.

Founded in California in 1991, IDEO is a design thinking firm with an impressive client list that includes Coca-Cola, Apple and Ford.[86] According to CEO Tim Brown, "Design thinking is a human-centered approach to innovation that draws from the designer's toolkit to integrate the needs of people, the possibilities of technology, and the requirements for business success."[87] The organization's newer non-profit arm, IDEO.org, attempts to apply these principles to the world's Wicked Problems, such as healthcare and education.

Adolescent pregnancy in Zambia is certainly a Wicked Problem. It is multifaceted, with numerous contributing factors and cascading effects. It is linked to poverty and education: almost half the adolescent girls in the lowest wealth quintile have been pregnant compared to 10 percent in the highest wealth quintile, and 120,024 girls became pregnant and dropped out of school between 2007 and 2014.[88] It is also linked to policies and mindsets: Zambian customary law allows girls to marry as soon as they attain puberty and child marriage stands at 34 percent.[89] 85.5 percent of Zambia's population is Christian (compared to 66 percent in East Africa and 32.8 percent across the globe), and contraception and abortion are sensitive topics.[90] According to the UNFPA, the effects of adolescent pregnancy in the country include reduced opportunities for girls' education and an ensuing cycle of poverty, physiological stress from unsafe abortions, exposure to sexually transmitted infections, and poor infant health.[91]

In the face of this complex and dynamic socio-economic and cultural context, MSZ, IDEO.org and the Hewlett Foundation hoped that approaching the problem through HCD would help them arrive at innovative solutions informed by community feedback. The program's theory of change was that bringing the different perspectives and areas of expertise of IDEO.org and MSZ together, and implementing a HCD process sustainably and at scale could solve persistent problems in Zambian reproductive health, leading to better adolescent sexual and reproductive health outcomes.[92]

To implement this theory of change, IDEO.org and MSZ set out to spend "14 weeks immersed in the lives and aspirations of Zambian teens" and ultimately designed a solution that lay, not in clinics, but in vibrant hangout spaces where girls in Lusaka could chat, do their nails and felt comfortable having informal conversations about sex.[93]

According to Program Officer Margot Fahnestock who led the initiative for the Hewlett Foundation, teenage girls who walk into Diva Centres will find comfortable shared spaces, bottles of nail polish and booklets about the Divine Divas. As Figure 9 illustrates, the Divine

Divas are a set of aspirational characters. Each of their lifestyles and personalities have been created to suit a particular type of contraception.

Figure 9. Divine Divas[94]

Girls will also be greeted by a Marie Stopes nurse, who according to Fahnestock, would usually be a younger woman who is dressed casually and stylishly. She will greet and chat with the girls, answer any of their questions, and take them into a private room for counselling and to provide contraception. All of these services are provided for free. At the peak of the program, there were three Diva Centres in Lusaka. Marie Stopes is using a similar approach to design services for girls in Kenya, rural Zambia, and possibly to cater to teenage boys as well.

Bumper Cars and the Design Thinking Process

IDEO.org's design thinking process usually occurs across the three phases of inspiration, ideation and implementation:

- **Inspiration.** During the inspiration phase, IDEO.org's team, along with MSZ tried to immerse themselves in the girls' lives. Some of their participatory methods included a teen hotline, scavenger hunts, visits to MSZ clinics, and shadowing girls and clinicians to understand their typical day.[95] It was through this process that Fahnestock believes IDEO.org discovered the popularity of personality quizzes amongst young girls. "Young women in urban Lusaka really loved to do personality quizzes," and share them amongst each other. It was also during the inspiration phase that Divas were raised as aspirational figures. According to Fahnestock, it was in fact Zambian boys who explained, "Well a diva is someone who's independent. She's smart. She's strong. She's disease-free." Given the high prevalence of HIV in Zambia, Fahnestock says, "that disease-free part was very important to them."

- **Ideation.** The ideation phase was for conducting rapid prototyping, to convert insights from the inspiration phase into concepts that could be implemented and scaled. IDEO.org's team flew in to Lusaka for a second trip, and this time began testing environments in which girls felt most comfortable to talk about sex and reproduction. One such environment was a relaxed atmosphere, with bottles of nail polish.[96] This setting proved to be successful enough to form the basis for the Diva Centres. "They found that by doing nails, that was a really easy way to have that conversation about maybe more sensitive topics because you don't actually have to make eye contact," explains Fahnestock, "You can be doing someone's nails and looking at their nails while asking them a question."

- **Implementation.** This final phase is one that Fahnestock considers to be ongoing. This is when concepts from the ideation phase are operationalized and typically handed over to IDEO's client. An independent evaluation of the Diva Centres by Itad describes this as the point when the concept saw, "coherent solutions exposed to operational realities, and ongoing iteration around these realities."[97] This was also the point when tensions and lessons emerged.

Fahnestock points out that when tackling a Wicked Problem like that of adolescent pregnancy in Zambia, there is no consensus on solutions and pushback is inevitable. In her view, these tensions must be addressed sooner or later, and a design thinking approach helps bring them to the fore sooner. "Whenever you're dealing with any cultural or social norm change, it's just really messy, "she says, "I think the fact that we were rapid prototyping really pushed that envelope and highlighted those tensions, that would have existed anyway, because we were working on highly sensitive issues, in a context that's very conservative."

She likens the HCD process to bumper cars: "You hit against a wall, hopefully it's padded, just keep going and redirect and figure out what to do next. I think the challenge is to figure out what the bumpers are. What the parameters are, the cost constraints, cultural constraints." Itad's preliminary assessment of the Diva Centres' journey also depicts a bumpy trajectory of highs and lows.[98]

Successes, Challenges and the Road Ahead

Evaluating the trajectory of the Diva Centres is difficult to do because the bumper car journey is not yet over, and opinions vary depending on how success is defined and measured. "It's still really hard to tease out the story," says Fahnestock, "because this work continues to evolve."

Successes

- **Increased number and proportion of adolescent girls seeking MSZ services.** According to IDEO.org, 82 percent of girls who visit a Diva Centre get contraceptive services and 36 percent return for another visit.[99] The Centres see about fourteen teens a day and 11,000 in total, which Fahnestock says brought the proportion of adolescent girls at MSZ clinics up from 7 to 17 percent.[100] In terms of meeting MSZ's desire to increase the number of adolescent girls at MSZ clinics who request contraception, the Centres appear to be a success, though numbers are difficult to analyze in isolation, without comparable benchmarks.

- **Resonating success of the Divine Divas.** Fahnestock believes that one of IDEO.org's early insights to reposition birth control from a public health product to more of a lifestyle product has been enormously resonant with young women in urban Lusaka. She states that some girls identify so strongly with the Divas that rather than request for an IUD, they might use the language of the Divine Divas instead and say, "I'm a super girl. I want the super girl." She believes this success is related to the consistency and quality of how the program was designed and executed—an aspect that can often lead HCD programs to go astray.

- **Buy-in from teen connectors.** MSZ ensured that each Diva Center had two "teen connectors", who were young people who could act as peer educators and agents of the centers. According to Itad, teen connectors would "use adolescent-friendly language and the 'Divine Divas' to explain the different contraceptive methods." Fahnestock believes that teen connectors have been critical to encouraging young girls to visit the Diva Centres, and by choosing to make them paid employees, MSZ ensured that teen connectors truly became part of the team and each feedback loop.

Challenges

- **The time-intensive work of building trust and understanding hyper-local context.** Though IDEO typically assigns 14 weeks to its HCD process, this timeline is too short to apply in the context of the social sector. According to Fahnestock, "When you're doing rapid prototyping you have to be very considerate of the community context and, sometimes, maybe err on the side of slowing things down a bit, to make sure that you prime the community before you do the testing." One particular bumper car collision illustrates this insight convincingly.

  During the process of rapid prototyping, IDEO.org and MSZ set up an afternoon clinic that created significant tension in a conservative community where MSZ had done no community outreach or sensitization. Given the perception of Marie Stopes by some segments of the community as an abortion clinic, this was problematic: "It turned out the clinic was owned by a pastor. The clinic was next to an elementary school. And by that night, there were moms crying on television that their daughters had been injected with cancer causing drugs. The police got involved. The Minister of Education got involved. It was potentially a massive disaster." The afternoon clinic had been initiated on the back of the success of a morning clinic. Unlike the afternoon clinic, the morning clinic was conducted in an area where IDEO.org and MSZ had made efforts to build relationships and understand the local context. According to Fahnestock, they did not anticipate that local context in a neighboring community might be so vastly different. Yet, Fahnestock believes that even this tense moment ultimately led to good outcomes as "it actually got the Ministry of Education, the police, on board … it actually served to be a really good relationship building moment." Nevertheless, she believes that, "going forward, there had to be a lot more community sensitization and work with parents, and pastors, and local leaders," to prevent incidents of this nature from recurring.

- **Financial sustainability and scale.** While Fahnestock emphasizes that this is not the fault of HCD as an approach, but rather the implementation of it in this particular instance, the high costs of sustaining the Diva Centres have been another challenge in the bumper car journey. According to Fahnestock, "[MSZ's CEO] and I were shocked to learn that in fact

they were about eight times as expensive as Marie Stopes' typical client costs." Due to MSZ's concerns over cost and implementation, Fahnestock explains that the Hewlett Foundation has had to continue providing grants to support the evolution of the Diva Centres for significantly longer than anticipated. As a foundation with an explicit commitment to effective philanthropy and a desire to be nimble, flexible and adaptive with funding, the foundation has been willing to take on this challenge.

However, the high cost burden and need to evolve the Diva business model has led to other unfortunate consequences, such as the closing down of two out of three Diva Centres in Lusaka in order to rethink how Marie Stopes can offer these services. Sustainability holds increased importance in the social sector due to the potential harm that can result from introducing and then withdrawing critical services. Fahnestock would agree since she believes, "you just have to be very careful when you're really testing things with real people."

She reiterates however that, "This didn't have much to do with human-centered design. It had to do with the partnership, the relationship, the communication between the partners." It was primarily a lack of communication between the foundation, IDEO.org and MSZ that led to the former designing a solution that did not fit within the latter's business model. This highlights that internal or horizontal feedback loops within one's organization, or across partners are just as important as those with the communities one seeks to serve. According to Fahnestock, MSZ, IDEO.org and the Hewlett Foundation are working on building a partnership with Zambia's Ministry of Health to help address the issues of sustainability and scale. This joint venture social franchise intends to replicate the Diva model in Zambia's Copperbelt Province. It will be staffed by Marie Stopes, with the Diva model design elements, but facilitated, supervised and managed by the Ministry of Health. "The plan over the next 12 years is that they slowly transition full ownership to the Ministry of Health," says Fahnestock.

The journey of the Diva model demonstrates the hard-earned highs and inevitable lows of tackling Wicked Problems. As Fahnestock puts it, it is "not for the faint of heart." Organizations that wish to apply HCD within the social sector must be ready and willing to take on bumper car collisions, and continuously learn and adapt their responses to hyper-local, dynamic cultural contexts. Knowing when to accelerate action, and when to slow down to truly listen and communicate with internal and external community members is critical. A cookie-cutter approach to transferring feedback loop mechanisms from the business world to the social sector may not work, but the Diva Centres illustrate the tangible benefits that can be gained from a more nuanced application of feedback mechanisms from different disciplines.

The James Irvine Foundation's Community Listening Sessions

A repeated theme that emerged across the interviews and secondary research conducted for this brief was a dearth of initiatives to demonstrate direct feedback loops between foundations and communities on the ground. The James Irvine Foundation (Irvine)—one of the core funders of the Fund for Shared Insight—was the only interviewee to buck this trend on account of their Community Listening Sessions (CLS), which were a series of conversations hosted by Irvine to listen to Californians who are working but struggling with poverty. Director of Impact Assessment and Learning, Kim Ammann Howard, Ph.D., described how these listening

sessions served as an initial experience of going directly “to the ground.” CLS lessons are being used to decide what types of feedback practices the foundation should support on an ongoing basis. Regardless of their eventual decision, these efforts demonstrate the motivations, methods, key themes, and potential consequences of a foundation listening and learning directly from the communities it seeks to serve.

Motivations

According to Howard, Irvine already had certain feedback loops in place before the CLS. They periodically participate in the Center for Effective Philanthropy’s Grantee Perception Reports, have informal feedback loops with certain grantee cohorts, and view their involvement with the Fund for Shared Insight and Listen for Good as an effort of “leaning in” to the listening between grantees and their constituents. In addition to feedback loops at the grantee level, Howard explains that the foundation had a desire to engage directly with those they seek to serve and learn more about their day-to-day experiences—their hopes, challenges, and aspirations.

“The reason we wanted to push ourselves in this direction is that when we get feedback from grantees about those they serve, it's from a specific issue-focused group,” says Howard. The CLS gave them an opportunity to hear from “a broader group of individuals who are working but struggling with poverty but aren't necessarily tied to a specific grantee, and to gain a better sense of their lives and all the types of things that impact them.” This was an opportunity for the voices of the people to inform Irvine’s future work, as well as to affirm existing focus areas.

Methods

As in the case of the Diva Centres, CLS also drew from principles of human centered design. The listening sessions consisted of fourteen in-person group conversations with more than 400 working Californians from low-income communities (see Figure 10). The sessions lasted for up to three hours and were conducted in ten languages across six regions of California where Irvine funds.

Figure 10. Community Listening Session Participants[101]

The Foundation engaged a for-profit design firm to conduct the listening sessions in line with HCD principles. This meant interactive sessions with open, brainstorming conversations involving post-its and visuals and having participants draw, discuss and iterate solutions in small

and large groups. Howard admits that the open format of the discussions was initially uncomfortable for some staff, especially those with professional research backgrounds, who wondered, “How is this going to be rigorous?” However, she states that staff ended up seeing the value of the iterative nature of learning that took place across the sessions and the, “more open space for people to talk about their experiences … versus a more confined protocol with very focused questions. … They're both really valuable [collection methods], but they're different.”

In terms of recruitment, Howard says that the consultants initially tried to recruit a more random sample of participants, through advertising on Craigslist. Even with the offer of financial incentives, childcare and food, this proved difficult. As a result, the main recruitment took place through engaging community partners who had strong relationships with low-income groups. This also had the benefit of community partners being able to provide participants with information about supports for challenges identified during the sessions; this was particularly important for participants who were in crisis.

At the listening sessions, individuals were identified and asked if they were willing to participate in 60-90 minute follow-up sessions, so that Irvine could gain a deeper understanding of their daily lives.[102] According to Howard, this involved, “scheduling in-depth, at-home interviews with twelve different individuals who participated in one of the sessions.” They also used a mobile application, dScout, to engage with 58 young people (18-36 years old), who were also struggling financially, but were from areas of the state where the CLS were not held. The mobile application posed specific questions over a period of a week or so asking these young people to respond with texts, photos and videos.[103]

Finally, the CLS closed the loop with participants. Participants who shared their email addresses and cell phone numbers were provided with the Foundation’s aggregate findings from across the state. A summary of the findings were provided in four different languages; English, Spanish, Simplified Chinese and Traditional Chinese.

Key Themes

Five common themes emerged from the CLS as important priorities of working, low-income Californians:

1. To live without having to make extreme trade-offs.
2. To live without fear and anxiety.
3. To be treated with dignity.
4. To be connected to a strong community network.
5. To have the opportunity to improve their situations.[104]

Given that the Foundation had recently announced a new intention to focus on expanding economic and political opportunities for California’s working poor, Howard says that the themes both “confirmed and informed” this new strategic focus. It also provided important contextual information, such as challenges with housing, childcare, and transportation.

Learning and Consequences

Since the CLS project concluded in February 2017, Howard states that the Foundation is starting to apply what they've heard. She strongly believes that Irvine has a responsibility to act on the community opinions that have been gathered. "If we're going to ask what people think, then we need to not just listen, but we need to learn, and then we need to apply that [learning]. And that doesn't mean we always do everything that people suggest, but it should make a difference to our work, our decisions, and our approach," she says.

Howard is optimistic about the impact of the listening sessions on the Foundation's work stating that it already influences their thinking and conversations about grantmaking both internally and externally. One intangible but powerful consequence of the sessions was the emotional impact of the sessions on grantmaking as well as non-grantmaking staff. "We laughed and we cried," says Howard, "Being around the table with those who are working but struggling with poverty, and hearing their stories … I think we really carry their voices and their faces, and the experiences." It is possible that this will create the type of frontline staff buy-in that Feedback Labs recommends cultivating.

The sessions also fostered dialogue among groups of community participants who don't necessarily interact. For example, according to Howard, Spanish-speaking tables and Mandarin Chinese-speaking tables connected with each other and were surprised to find similarities in their struggles and experiences. "They had "aha [moments]" for themselves, and they exchanged resources many times," says Howard.

While Howard is not sure if the CLS project is likely to be repeated on a regular basis (e.g., due to the cost and effort that they entailed), the Foundation remains committed to identifying direct community feedback loops that can be implemented on an ongoing basis. The challenge is to determine the types and frequency of these efforts so that what is learned truly informs the Foundation's work. Overall, it seems clear that the listening sessions had positive outcomes, and social finance would benefit from making them a sustainable, iterative experience.

V. Getting Social Finance to Listen, Learn, and Walk the Talk

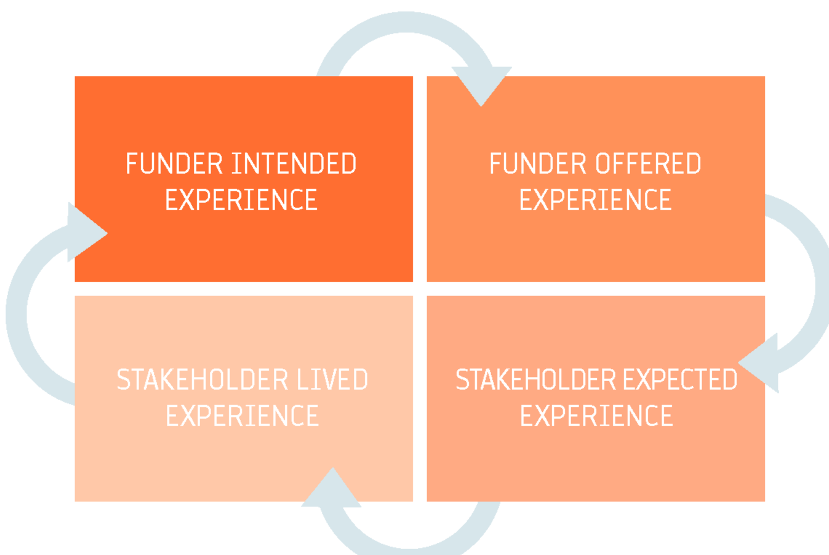
"I think that one of the frustrations of the core funders in the Fund for Shared Insight, and an area we're focusing on in the next three years…is that it has been easier to get non-profits to implement high-quality feedback loops than it has to get foundations to do so."

—Kathy Reich[105]

The examples of CEO and the Diva Centres are admittedly not perfect, but they both reveal a concerted commitment from social service providers to community needs, and a willingness to share lessons and mistakes with the field. For the reasons already established in this paper, a similar level of commitment is not as evident at the foundation level. When foundation interviewees were asked to describe feedback loop mechanisms that they have instituted with internal or external communities, they consistently had difficulty providing answers and Threlfall described it as the "million-dollar question."

Funders of the Fund for Shared Insight displayed varying degrees of commitment to grantee and community feedback. Some foundations admitted that they only rely on independent grantee surveys, such as the Center for Effective Philanthropy's grantee perception reports, while others like the Irvine Foundation appear ahead of the curve, attempting to institute feedback loops across the value chain. The field requires more examples like that of the community listening sessions, which can be sustained on an ongoing basis and demonstrate efforts to create vertical alignment between the experiences a funder intends to create, and the actual lived experiences of community members (see Figure 11).

Figure 11. Deliberate Leadership Alignment Framework

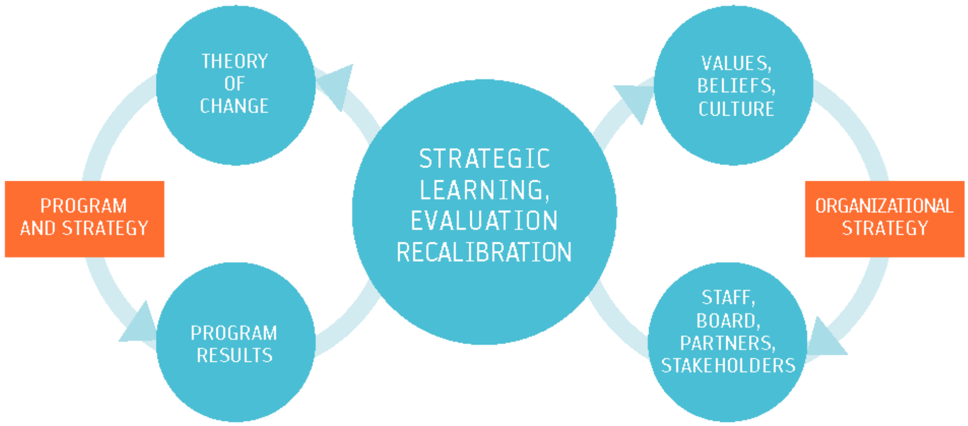


Other core funders were candid about aspects that might stand in the way of them soliciting grantee and community feedback. According to Baker, “Philanthropy loves to encourage other organizations and other people to work together, but philanthropy has a hard time actually working together itself.” Reich cited time constraints as a factor, stating that, “People never seem to have enough time. … The ability to really get out of the walls of the Ford Foundation and listen and engage with people on the ground is very limited. It's hard enough to listen and engage with representatives from grantee organizations. If they're not grantee organizations, it is much, much harder.”

Both the Ford Foundation and the Packard Foundation try to instill learning cultures in their grantee organizations through their BUILD and Organizational Effectiveness programs, respectively. The Hewlett Foundation follows a similar approach with its own Organizational Effectiveness grantmaking program. These programs provide funding to grantees that goes towards institutional strengthening and organizational assessment, and grantees take the driver’s seat to make self-assessments about the gaps in their organizational effectiveness. Interestingly, Baker and Reich both find that these programs have spillover positive effects on listening and learning cultures within their own foundations. For instance, Baker says that in order to overcome grantees’ fear of sharing failures, Packard Foundation officers are coached to cultivate strong relationships with grantees and demonstrate a genuine interest in knowing what grantees are learning. Similarly, Reich says that BUILD requires Ford Foundation officers to truly listen, “The internal goals of BUILD are around changing the culture of grant-making within Ford, to really emphasis listening, collaboration, humility.”

These spillover effects of programmatic implementation are promising, but they do not get to underlying organizational values and culture, which are the critical levers required for transformational change. As Figure 12 indicates, organizational and programmatic strategies are inextricably intertwined. The values and culture set by the leadership of an organization determine who it hires and the partners it engages, which in turn affects the programs it rolls out as well as how they are implemented. The results of these programs, as felt at the community-level, can in turn affect the next iteration of organizational strategy, but only if they are reported back to organizational leadership. If any links in this chain do not engage genuinely and purposefully while communicating with each other, the feedback loop breaks down. Therefore, given that program results as experienced by communities are not currently reaching the ears of foundation leaders, systemic change will have to be driven by values-based strategies of foundation leadership.

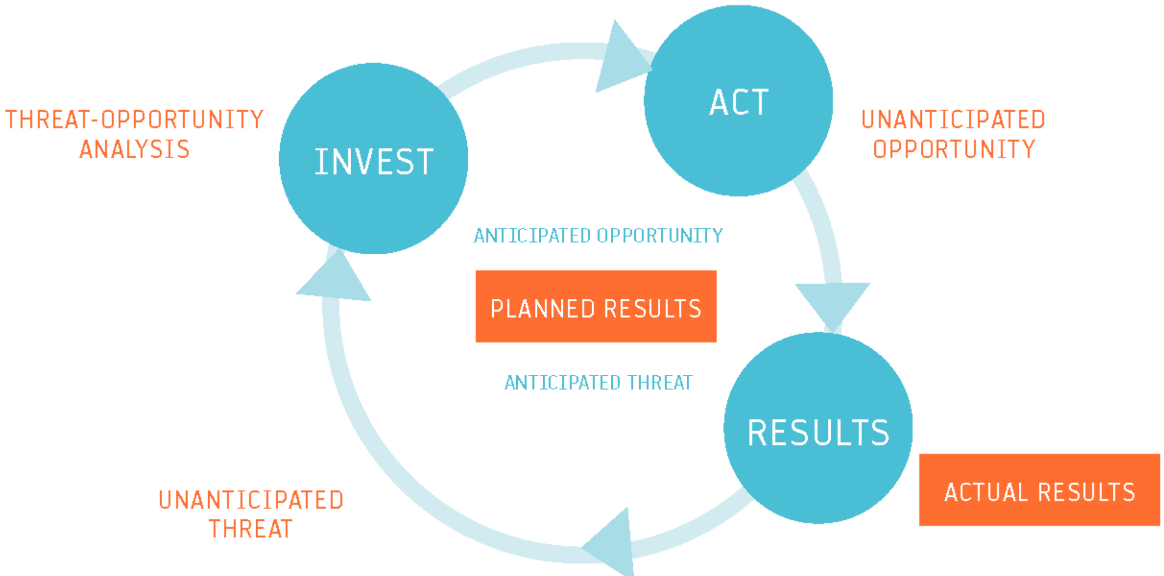
Figure 12. Balancing Organizational and Programmatic Strategy



Once again, this raises the importance of clarifying a value proposition for foundations to engage directly with community. Referring to the lack of funder support for community feedback loops, Howard calls it surprising that, "something that seems really obvious and doesn't even feel like it needs to be a sell, still needs to be a sell." She believes it will take a clear communication strategy and tangible examples and benefits to convince foundations of the value proposition. Given the nature of the social sector, she believes it might also take "a double, or triple bottom-line" value proposition to move the needle.

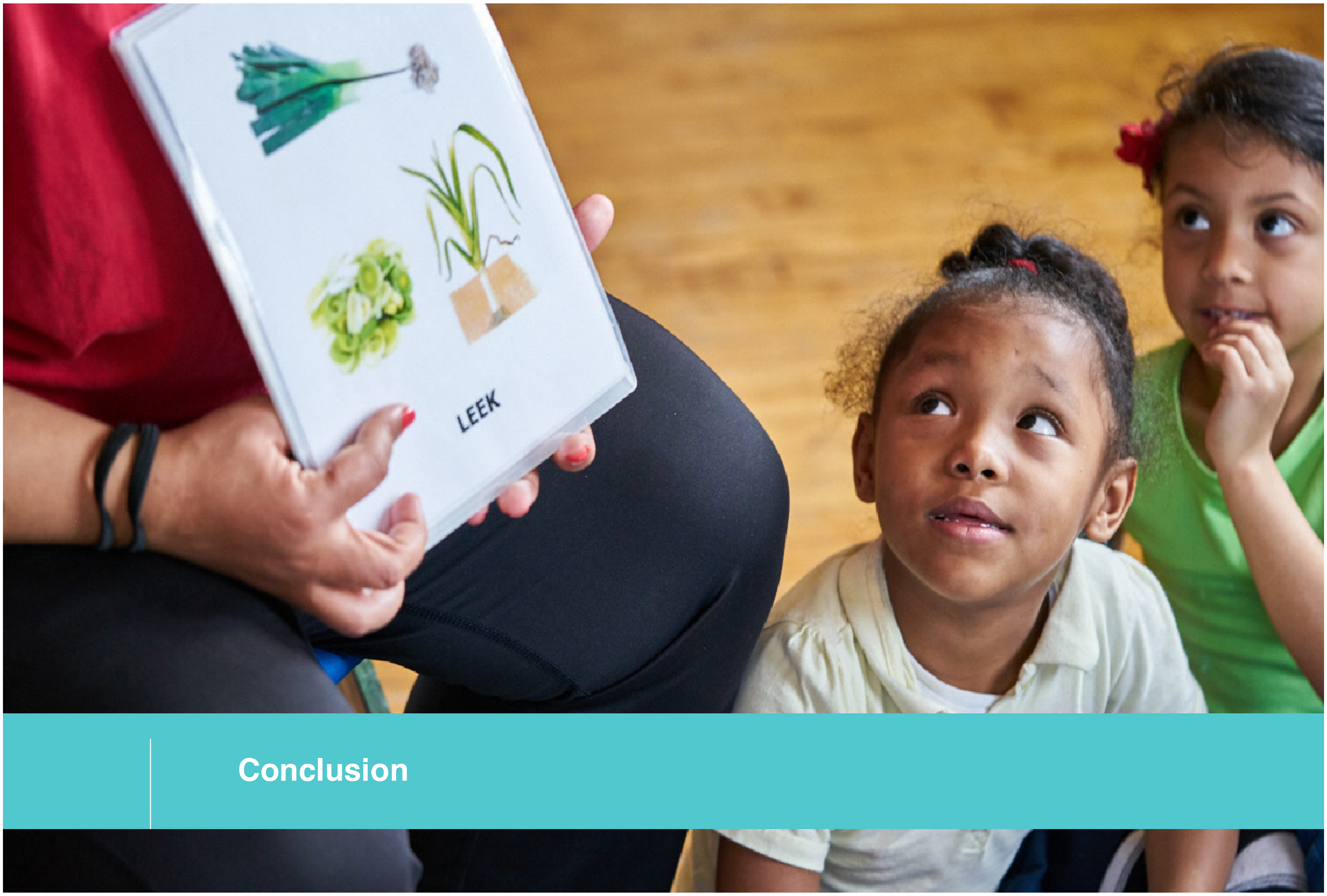
Baker suggests making a case based on foundations' exit horizons: "If you're going to be in something for a limited period of time, which much of philanthropy is, you should be thinking from the beginning about what capacities are going to be needed when you're done, and how the work that you do can build those capacities, first and foremost." Otherwise, Baker believes that foundations often find themselves having to provide additional funds to tide grantees over unanticipated threats. Community feedback can help reduce the likelihood of unanticipated threats that might derail funders' exit plans (see Figure 13).

Figure 13. Threat-opportunity Analysis



Admitting that unanticipated threats exist and embracing the notion of asking for help might be uncomfortable for many social sector leaders. Whittle points out that leaders who rise to the C-suite of top-down organizations like foundations who probably did so “because they honed these skills of controlling the narrative.” However, he is unequivocal about the fact that, however difficult it may be, it is still imperative that leaders cultivate listening and learning cultures:

> “This is your job as leaders. Nobody else can do it, and it's really hard. It's hard because of bureaucratic inertia. We've always done things a certain way, and it's hard because we as individuals got where we are by doing it differently. But the essence of leadership is to do what's right even when it's not what we have always done, or what we think we should do, or what other people tell us we should do. The essence of social finance is to try to make the world a better place, and if we don't find out whether what we're doing is achieving that goal as soon as possible…we're not doing our jobs either as organizations or as leaders. That's the essence of leadership.”



Conclusion

VI. Conclusion

Examples like CEO, the Diva Centres, Irvine's Community Listening Sessions and the Fund for Shared Insight, demonstrate that many social sector organizations are already convinced that community feedback loops are indeed the smart and right thing to do. Feedback loop frameworks like those of Keystone Accountability, Feedback Labs and Deliberate Leadership are being developed specifically for the social sector, and business-focused methodologies like Design Thinking are being tested and tailored to address Wicked Problems. Amidst these promising signs of progress, there is still much work to be done. Thought leadership is yet to agree on a shared understanding and application of terms like “feedback” and “constituents,” and there is a growing need to ensure that expert-driven monitoring and evaluation practices do not overshadow community feedback mechanisms.

Of greatest concern are the deep-seated systemic challenges that persist across the value chain. Top-down capital flows create top-down power dynamics that prevent existing feedback

loops from working as they ought to. Even the most committed grantees and funders struggle to ensure that authentic community voice is heard and genuinely addressed within their organizations. The onus is on those who control social finance to deliberately inclulcate cultures of listening and learning across the social sector value chain, and especially within their own organizations where these cultures appear to be most lacking.

As Dudding concluded through his experiences at CEO, this culture change needs to be values-driven more than data-driven in order to be truly powerful, and the challenge falls squarely on the shoulders of leadership. Leaders control the levers on organizational values, beliefs and culture. They determine whether constituents feel comfortable about sharing failures and disappointments, and whether negative feedback triggers a doom loop or is viewed as a learning opportunity. As Whittle suggests, embracing cultures of listening and learning is going to be a tall ask for those who are used to being rewarded for controlling the narrative. However, it is essential for those who wish to solve and re-solve Wicked Problems. To quote Elizabeth Christopherson, the CEO of the Rita Allen Foundation and another funder of the Fund for Shared Insight, "What happens when you fund conversations about changing the world for the better? The answer is: you don't know—that's exactly why you do it."[106]

Questions for Consideration

- What are some of the ways that a lack of attention to feedback can negatively affect a project, program, or social investment?
- Why does the social sector lag the traditional for-profit sector in incorporating user-generated feedback in its operations?
- At what stages of a project should feedback mechanisms be used?
- What is the role of organizational leadership in implementing feedback loops?
- What are some of the ways in which feedback loops can be faulty?

Appendix 1. List of Interviewees

Name	Organization
Alexa Cares	Nurse-Family Partnership
Benilda (Benny) Samuels	Nurse-Family Partnership
Brad Dudding	Center for Employment Opportunities
Cathy Moore	ECHOS-Houston
David Bonbright	Keystone Accountability
Dennis Whittle	Feedback Labs
Elena Marks	Episcopal Health Foundation
Elizabeth Christopherson	Rita Allen Foundation
Fay Twersky	William and Flora Hewlett Foundation
Kathy Reich	Ford Foundation
Kim Ammann Howard	James Irvine Foundation
Linda Baker	David and Lucile Packard Foundation
Lissette Rodriguez	Edna McConnell Clark Foundation
Margot Fahnestock	William and Flora Hewlett Foundation
Roy Steiner	Omidyar Network
Valerie Threlfall	Fund for Shared Insight

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[106] Elizabeth Good Christopherson, "The Secret to More Effective Philanthropy: Funding the Unknown", *Ashoka* (blog), March 28, 2013, https://www.forbes.com/sites/ashoka/2013/03/28/the-secret-to-more-effective-philanthropy-funding-the-unknown/#30a7b0b75669.