keystone

Keystone Accountability 2004–2009

Constituency voice: linking the means and the ends of social change

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Welcome

Dear Keystone Constituents,

I am delighted to share Keystone's first public report for the period since Keystone's creation to July 2009. Its main purposes are to describe what we do and to report what we think we have achieved over our first five years.

The report has three main parts. The first is this main report, *Keystone Accountability 2004-2009 – Constituency voice: linking the means and the ends of social change.* It reviews the state of constituency voice in the sector and offers an overview of Keystone's journey till today.

The second part presents the results from an online survey of our constituents. *What you told us: the 2009 Keystone Constituency Survey Report* is a summary of our constituents' views on how we are doing. We also included the principal survey findings in the main report.

The third part is the *Keystone Results Ledger*, which is our chronological record of results that we collect from our day-to-day work. This is an important internal tracking and learning document for Keystone. We plan to publish it once a year to enable others to see how we experience our work results.

We did not want this report to be only, or even mainly, about Keystone. We want it to shine a light on what we are most passionate about: constituency voice. The first sections of the report are about the state of constituency voice in social change organizations today. They show, regrettably, that constituency voice is currently more an aspiration than an ethic or a practice.

Keystone, working with many of you, is developing and testing the practical ways and tools to turn this aspiration into practice. We have learned that to realize constituency voice one needs to be systematic, embedding right practices at each and every stage of the typical operational cycle of planning, implementing, monitoring, assessing, and public reporting. One needs to put the views of the people most affected *by* your work at the heart of the *way* you work. One needs to learn with one's constituents. Among other things, best practice involves measuring the quality of those and other important relationships, and publishing those measures.

We have tried to exemplify these principles in this public report. Please let us know how we can do this better ourselves. For this purpose, we have a comment function embedded on each page of the report on our website.

Please also let us know in what other ways we might work with you to promote constituency voice, and to meet our greatest threats – extreme poverty and environmental disaster.

With best wishes for our common future,

David Bonbright
Co-Founder and Chief Executive

What is Constituency Voice?

Keystone helps organizations develop new ways of planning, monitoring, assessing and reporting social change. Our work is organized around the central concept of constituency voice.

Social purpose organizations (SPOs) engage with various constituents, including three core groups: those who provide resources (funders), those who implement programs (implementers) and those intended to benefit from interventions - the groups, often vulnerable and marginalized, for whom social change is directed (primary constituents).

We use the term 'primary constituents' to denote the unique importance of the people whose lives are affected most by SPOs' efforts. Their actions are most important for making and sustaining positive change. They are the ones whose relationships with the SPO most determine its effectiveness.

Constituency voice refers to the practice of ensuring that the views of all relevant constituents, particularly primary constituents, are seriously taken into account in the planning, monitoring, assessing, reporting and learning processes taking place within organizations. It is closely linked to the concepts of participation and empowerment. We gratefully acknowledge our debt to these ongoing bodies of work and a wide range of related research and practice.

In practical terms, we believe constituency voice can be applied in three crucial processes.

Planning:

- Hear all relevant constituents' voices when analyzing social issues, determining strategies, and defining success.
- A 'theory of change' based approach can help identify system-wide issues, and as the basis for designing specific and measurable activities.

Assessment:

- Hear all relevant constituents' perceptions about actual performance.
- Feedback systems can make the views of the least powerful people accessible for managers and funders.
- If different people's views of similar issues are quantified, they can be summarized and compared to each other, creating powerful insights across programs.

Deliberation:

- Engage all relevant constituents in dialogue and critical review of performance compared to plans.
- This can generate action-oriented learning, deeper analyses and lessons for improvements.

Deliberation can naturally flow into the next cycle of planning, feedback and deliberation. We sometimes call this the 'relationship cycle'.

These processes depend on bridging the inherent power differences between different constituents. They rely on enabling conditions including:

- Sincere commitment from senior decision-makers to listen, engage with and respond to less powerful constituents at every stage.
- Transparency in public reporting. This means ensuring that public reporting is accessible to the least powerful constituents in ways that are easy for them to access. This includes information about strategies, resources, constraints and what constituency feedback the organization has collected and how it is using it.

Feedback can be used to measure the strength of constituency voice itself – for instance through questions like "when and how much do managers solicit your views?". This can generate metrics of the quality of relationships between constituents. In turn, these may be predictive indicators of overall success.

Finally, we argue that constituency voice should land in public reporting. In almost all cases, individual organizations can make the greatest contribution to solving complex social questions when they publicly report their plans, their deeds, the feedback of their constituents, and their learning. This helps strengthen collaboration between social actors and accelerates society-wide learning and progress. Reporting constituency satisfaction can also generate comparable performance data between organizations.

The most developed application of constituency voice comes from the world of business. In 1962, U.S. President John F. Kennedy issued a Special Message to Congress launching the consumer rights movement. It noted that consumers "are the only important group in the economy...whose views are often not heard".

Half a century later, detailed customer feedback data on virtually any product or service is freely available online. A whole industry has grown up to collect and deliver consumer satisfaction data, which is valued by consumer and businesses alike. Research has proved the correlation between customer satisfaction and long term growth, profitability and shareholder value.

Paraphrasing President Kennedy, we might say that primary constituents are the only important group in the *social* economy whose views are often not heard. Are we in social change ready to recognize their rights as the primary constituents of social change? Have we arrived at our 1962 moment?

Why Constituency Voice?

We believe that constituency voice helps social purpose organizations achieve more, collaborate better, and deliver improved services for the constituents they serve.

Enhancing accountability

Recent debates suggest that social purpose organizations are often seen as being more accountable to their funders ('upward accountability') than to the people they serve ('downward accountability'). This can lead them to impose 'solutions' on communities without fully and effectively allowing them to shape work as it unfolds.

Enabling constituency voice is a way of addressing this. Organizations can develop systems to engage with their primary constituents. Collecting and responding publicly to feedback can help build more accountable relationships – so that (a) primary constituents' views are always heard about the programs implemented on their behalf, and (b) managers know what level of 'downward accountability' is actually achieved in practice.

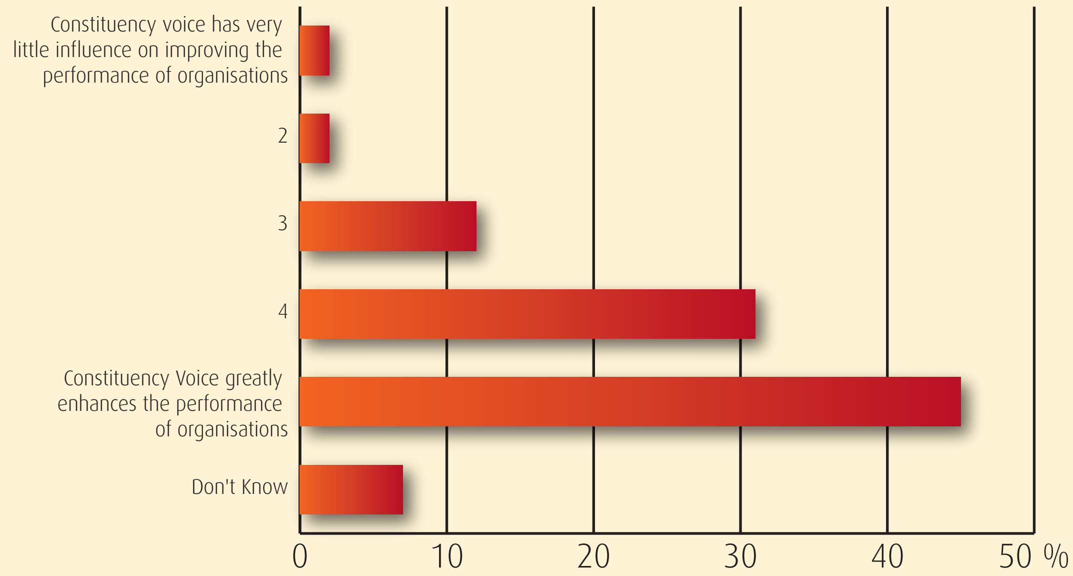
> *"Another way that running a foundation is not like running a business is that you don't have customers who beat you up when you get things wrong or competitors who work to take those customers away from you... This lack of a natural feedback loop..."*
>
> **BILL GATES IN HIS 2009 ANNUAL LETTER FROM THE BILL AND MELINDA GATES FOUNDATION**

Addressing the power imbalance

Normally, primary constituents have less power than development agencies, which in turn have less power than funders. Vulnerable groups may hold critical views about the support they receive, but may have strong incentives to tell agencies what they think they want to hear. Implementing agencies, fearing cuts in funding, may report the situation to their funders differently than it actually is.

We advocate that organizations tackle this difficult set of issues by fostering a 'constituent-focused' organizational culture based on dialogue, power sharing, transparency and open relationships with all relevant actors. This can have the effect of empowering primary constituents and amplifying their voices, which is often seen as a developmental goal in itself.

HOW MUCH DO YOU BELIEVE THAT THERE IS A LINK BETWEEN CONSTITUENCY VOICE AND IMPROVED PERFORMANCE OF ORGANISATIONS WORKING IN THE DEVELOPMENT SECTOR?



Measuring performance

Primary constituents are uniquely placed to assess the impact that development work is having on their lives. Their feedback can be immensely valuable in determining who has gained and who has lost from particular interventions and addressing questions such as gender-specific impacts, effects on particular social groups and issues of quality, as constituents' perceive it.

Primary constituents' views can be systematically sought, to check whether an organization is achieving its aims and provide funders with insight into more of the consequences of the interventions they fund. We believe that constituent satisfaction properly measured can become a driving force for improvement.

Enhancing outcomes

Downward accountability and constituency voice are increasingly seen as necessary for improving the quality of interventions. So we argue that, in most cases, strengthening constituency voice improves the processes that lead to outcomes. In addition, metrics that describe the quality of relationships with constituents may offer a predictive indicator of longer-term outcomes.

The data collection process itself can be an opportunity to encourage primary constituents to consider the different ways that outcomes can be sustained for the long-term benefit of their community.

By reporting those metrics back to constituents, mutual learning between organizations and their primary constituents can lead to improved approaches and a deeper understanding of the processes that drive social change. Collecting feedback from primary constituents can enhance the performance of organizations that take this feedback on board, thereby aiding them in their long-term developmental missions.

2009 SURVEY OF KEYSTONE’S CONSTITUENTS

In order to practice constituency voice ourselves, we conducted a survey of our constituents defined operationally as all those people with whom we have interacted professionally since the creation of the organization and for whom we have email addresses.

The survey was sent to 4,686 people. There were 620 responses to the survey, giving a response rate of 13 percent.

The survey inquired about perceptions on the current state of constituency voice and of Keystone’s contributions to this emerging field.

We recognize the selection bias inherent in our sample. In particular, our friends may have been more likely to take the time to respond. However we feel that the number of responses means that the results are still reasonably representative of the field of philanthropy. We have gained significantly from the insightful comments and suggestions received and we are committed to utilizing the feedback provided by our constituents to improve the quality of our work. We also received a variety of comments about how we could improve our work.

Some of the main findings from the survey are included in this report. Full survey results are available at: **http://www.keystoneaccountability.org/about/publicreport**

The State of Constituency Voice

Leading examples

We acknowledge the pioneering work that many different people and organizations are carrying out to deepen participation, empowerment and customer satisfaction.

The Center for Effective Philanthropy's perception reports

A set of surveys that provides foundation leaders with feedback from different constituents, including grantees, staff, and most recently ultimate beneficiaries.

YouthTruth

A Gates Foundation – Center for Effective Philanthropy project that surveys opinions of students to produce comparative data to guide schools' and education funders' decision making. Check out the stunning MTV video at **http://youthtruthsurvey.org/students/index.php**.

DARA's Humanitarian Response Index

Comparative data that assess the performance of humanitarian donors compared to the 'Principles of Good Humanitarian Donorship' defined and approved by the donors.

Citizen Report Cards and Community Scorecards

Tools for assessing the performance of public agencies and NGOs based on citizen judgments. The feedback is used to make improvements in services and keeps service providers accountable to the public.

Measuring Empowerment: Ask Them!

A social movement in Bangladesh used user-generated data to solve the problem of measuring empowerment, and making monitoring and evaluation useful for intended beneficiaries as well as managers and donors.

Listen First

Reports from fieldwork together with a draft set of tools and approaches that NGOs can use to be more accountable to the people they serve.

Outcomes Star

A tool that measures the outcomes of work with homeless people through the assessment of data generated by the service users themselves.

Great Nonprofits

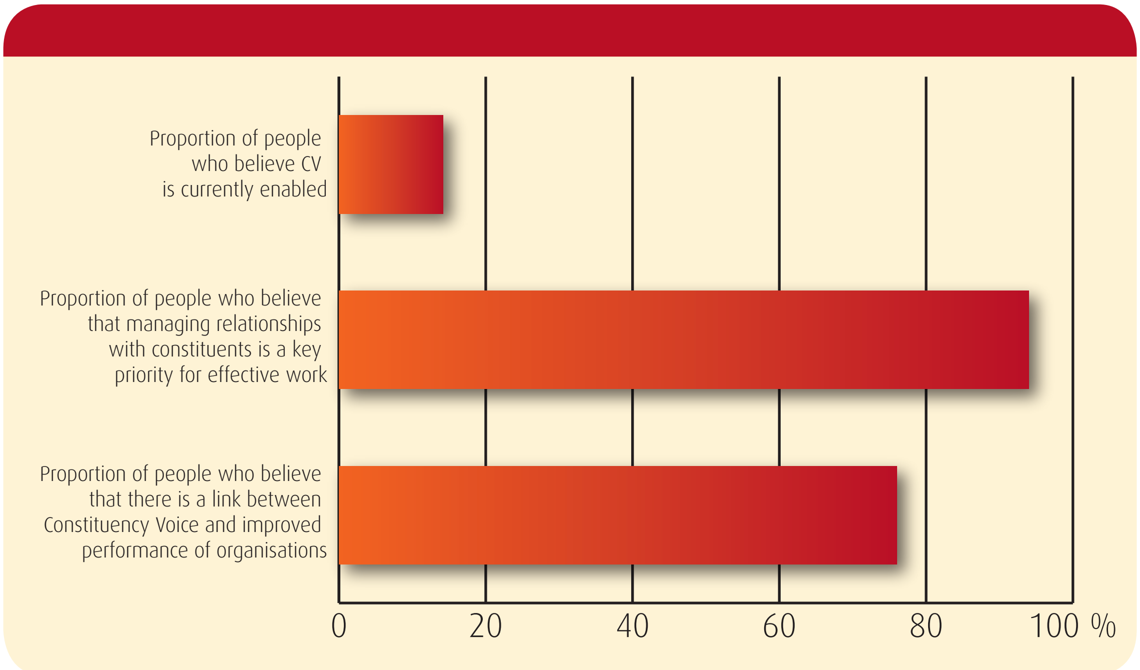
An online tool that provides user-generated data and ratings of peoples' experiences of nonprofits in the US.

Global Giving

Experimenting with publishing feedback from all constituents involved in projects listed on their online giving marketplace. In one example, SMS and internet feedback from beneficiaries facilitated collective action to create new leadership, redirect funding and strengthen community ownership of a development project.

Keystone's survey

Our recent survey shows that the overwhelming majority of managers in the development sector attaches a great importance to constituency voice and strongly believes that there is a link between enabling constituency voice and enhanced performance and impact.



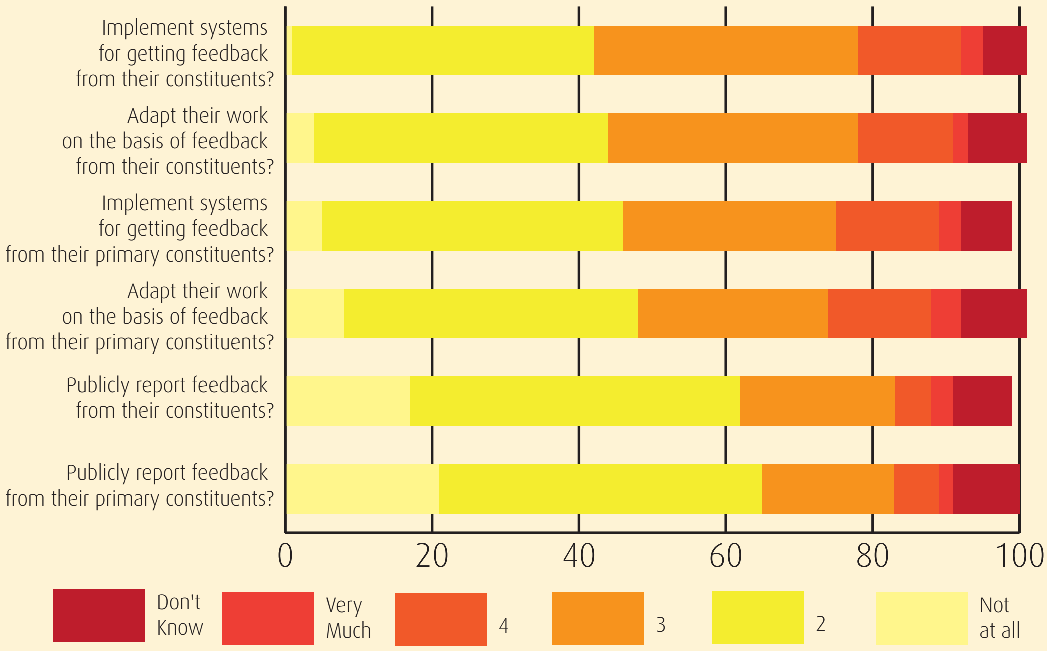
However, when it comes to the practical implementation of the principles of constituency voice, including formal systems to measure relationship quality, it is clear that there is much left to be desired. It seems that the majority of organizations are not currently enabling constituency voice.

There are various reasons why the current state of constituency voice seems to be poor. Among the most important ones are the conflicting incentives that organizations face and the difficulties of balancing relationships with multiple different actors. Authentic engagement with primary constituents tends to

"It is my impression that all of us involved in international development are falling short in this area, despite sometimes lofty goals. The best are probably small NGOs with strong proximity to primary constituents."

- **A SURVEY RESPONDENT**

FROM YOUR EXPERIENCE, TO WHAT EXTENT DO ORGANISATIONS WORKING IN THE DEVELOPMENT SECTOR AROUND THE WORLD CURRENTLY:



take time and increase complexity. These factors do not always fit well with fundraising imperatives – or requirements to hit short term project management goals.

Associated with this, organizations may not always have the resources needed to realize constituency voice. This was one of the major findings of the Keystone White Paper on *The 21st Century Potential of Constituency Voice: Opportunities for Reform in the United States Human Services Sector.*

On a more positive note, 58 percent of respondents who gave a rating believe that there is growing commitment to enabling constituency voice in the sector.

"There is improved understanding about the importance of 'voice' and more organizations are attempting to put systems in place. However in my opinion these processes are at early stages and are ad hoc and therefore their impact is not extensive."

- A SURVEY RESPONDENT

"This is an important issue to which many organizations pay lip service. However the overpowering nature of relationships with donors rather than primary constituents precludes this. If donors insisted, it would happen more." **- A SURVEY RESPONDENT**

About Keystone

History

There have been several stages to Keystone's development. From 2001-2003, David Bonbright initiated discussions on establishing new measuring and reporting practices for social change. This led to a steering committee being formed and culminated in an inception report published in October 2003. More information about our early sponsors and the inception report are available from our **website**.

The following year the Aga Khan Foundation seconded David to the initiative. Initial seed capital from the Omidyar Network and Hewlett Foundation allowed Keystone (then known as ACCESS) to come into existence. AccountAbility hosted Keystone and operations began in September 2004. Senior staff quickly came on board including Andre Proctor, based in South Africa. The board of trustees was assembled.

Subsequently, Keystone engaged in a range of piloting, learning and development activities, including with the Philippine Council of NGOs and the Nelson Mandela Foundation. We developed initial tools and models, deepened our knowledge of the field, and built a strong network of accountability innovators. In parallel with this methodology development work, we delivered a variety of evaluation-related services to clients. By 2007 our experience and learning had crystallized around the concept of constituency voice.

Without steady support from Hewlett Foundation amounting to $1.7 million over four years, Keystone could never have fledged the nest. Similarly, core support currently provided by the Metanoia, Fund has made growth possible.

In addition to our fiduciary trustees, Keystone has benefitted from a group of advisors that we call our Method Trustees. They include Srilatha Batliwala, Dr. Anabel Cruz, Jacinto C. Gavino, Dr. Catherine A. Odora-Hoppers, Dr. Mark Orkin and Jamey Power.

Many wonderful citizen sector leaders have provided steady encouragement and wise counsel since our first steering committee members. In particular, we would like to acknowledge the contributions of Tade Aina, Alesha Black, Gale Berkowitz, Evan Bloom, Kevin Bolduc, Paul Brest, Alice Brown, Phil Buchanan, David Campbell, Fred Carden, Carolyn Carr, Jack De Gioia, David Devlin-Foltz, Don Doering, Bill Drayton, Sarah Earl, Alnoor Ebrahim, Jed Emerson, Katherine Fulton, Tom Garwin, John Gerhart, Peter Goldberg, John Goldstein, Jacob Harold, Brent Harris, Stephen Heintz, Barbara Kibbe, Lawrence Haddad, Jacob Harold, Brent Harris, Pamela Hartigan, Caroline Hartnell, Jan Jaffe, Tom Kessinger, Sanjeev Khagram, Maritta R von Bieberstein Koch-Weser ,Venkat Krishnan, Mari Kuraishi, Michael Lerner, Antonella Mancini, Moeletsi Mbeki, William Meehan, Malusi Mpumlwana, Nancy MacPherson, Kumi Naidoo, Randy Newcomb, Linda Nguyen, Perla Ni, Iqbal Paroo, Zenda Ofir, Jamie Radner, Tom Rautenberg, Peter Raynard, Harold Rosen, Lester Salamon, John Samuel, Buzz Schmidt, Jason Scott, Henrik Skovby, Raj Shah, Paul Shoemaker, Ingrid Srinath, Fay Twersky, Dennis Whittle, Richard Woo, Janet Visick, Simon Zadek.

Former staff enriched us in both their work and their humanity: Gavin Andersson, Alejandro Litovsky, Siobhan MacCarthy, Cassie Boyd, Françoise d'Estais.

Theory of change and strategy

Keystone's theory of change posits that social purpose organizations will achieve more if they systematically build effective learning relationships with other constituents of the change processes in which they engage.

Based on our theory of change and our experience, we have developed a two-prong strategy:

- Carry out selective demonstrations, through which we seek to help organizations develop their own theories of change and improve relationships with constituents. This includes: running pilots with funders and implementers, developing practical tools for their use, contributing to related initiatives, creating a global comparative feedback data platform, and modeling our approaches in our own work.
- Influence key decision-makers and practitioners by: (a) engaging them in relevant debates, (b) building a movement of people and organizations committed to promoting constituency voice, and (c) giving away our analysis, tools, feedback data, reports and case studies.

For a more detailed record of our theory of change, analysis, strategy, services, and resources, please see our **website**.

Structure and Staff

Keystone Accountability is an international agency that is incorporated as three separate, self-governing tax exempt, not-for-profit entities in the USA, UK and South Africa. The three fiduciary boards approve policy and strategy. There is a unified management structure overseen by David Bonbright. The UK and US boards were created with a degree of overlap, appropriate for the initial stage of our growth. We are now working on increasing the separateness and diversity of the different boards.

Keystone Method Trustees

- Srilatha Batliwala
- Dr. Anabel Cruz
- Jacinto C. Gavino
- Dr. Catherine A. Odora-Hoppers
- Dr Mark Orkin
- Jamey Power

Our staff members are recognized development professionals and are often invited to speak at international conferences and other events.

Keystone Staff

- David Bonbright, Chief Executive
- Louise Clark, Project Manager (ALINe)
- Roger Granada, Office Manager
- Alex Jacobs, Director, Research
- Natalia Kiryttopoulou, Advisor and Research Associate
- Richard Ponsford, Project Administrator
- Andre Proctor, Director, Programme Services
- Munyarazi Saruchera, Advisor and Research Associate

Keystone's Fiduciary Boards

- USA: David Bonbright, John Goldstein, Peter Hero, Eric Kolodner, John E. Lange
- UK: John Goldstein, Peter Hero, Eric Kolodner, John E. Lange
- South Africa: Nomvula Dlamini, Francis Wilson, André Proctor, David Bonbright

Keystone's Contributions

Since 2004, we have identified several areas where we believe we have made a contribution, and others where we need to do more. We stated these in our constituent survey; the responses largely confirmed our expectations. We were pleased and surprised by the high response rates of the survey. We note, with a determination to improve, that 78 per cent of the people who gave a rating said they are comfortable with recommending Keystone to others.

THE KEYSTONE RESULTS LEDGER

Since the creation of Keystone in 2004 we have been keeping a record of evidence of the results that we can see from our work in our day-to-day activities.

We use the Results Ledger as part of our internal impact planning, assessment and learning system. It can be viewed in full on our website:**http://www.keystoneaccountability.org/about/publicreport**

Services

We offer high quality monitoring and evaluation services to NGOs and donors. We have worked with a variety of organizations around the world, including those working at community, national and international levels. Our involvement with them has provided us with learning opportunities as well. We are now better equipped to tailor our tools and services to local contexts and according to particular organizations' needs.

Our two major service offerings are: M&E system design and feedback surveys.

We use our 'Impact Planning, Assessment and Learning' (IPAL) method to design M&E systems. It provides a coherent framework to meet the evaluation needs of all actors and foster constituency voice. We work with clients to implement these services in ways that are adapted to their specific circumstances. See the boxes for more detail about IPAL and feedback.

We also work with civil society organizations by facilitating communities of practice and running workshops and seminars.

During our early exploratory phase, feedback from our clients and partners has been continuous, intense but unsystematic. As we move into a phase of service delivery, we are putting a formal system of client and partner satisfaction surveys in place.

The examples below illustrate the range of recent and current work:

Grantee feedback surveys

Working with two different groups of African grantmakers, we have implemented anonymous surveys to their grantees. The surveys provide a mechanism for grantees to say what they really think about how the grantmakers work that generates comparative data. This is important as individual grantmakers can see how they rate against other grantmakers, clearly identifying areas of better and worse practice.

FEEDBACK SURVEYS

Keystone helps develop and conducts anonymous surveys that capture the perceptions of an organization's work by its constituents, tailored to their individual context and requirements. This generates learning opportunities and ultimately helps to improve an organization's performance and impact.

From our experience in promoting feedback systems in the last 2 years, we found that many agencies see the potential and are ready to embrace feedback and cultivate constituency voice.

With feedback comes ethical responsibility. In order to respect this, we have developed a guidance framework, available **here**.

Try the power of feedback for free using our simple on-line **Feedback App**. It only takes a minute to set up, and provides a simple way for your constituents to tell you what they think about your working relationships.

IPAL (M&E) system design

We are working with a major international health advocacy campaign, to design an impact planning, assessment and learning system to track the results of their work. The system will include intermediary indicators, like measures of their influence with key policy makers and advocacy targets. We have worked with many other organisations in this way, from community organisations to national and international grant makers.

IMPACT PLANNING, ASSESSMENT AND LEARNING SYSTEMS

Our method for developing M&E systems is called Impact Planning, Assessment and Learning (IPAL). There are five steps in setting up an IPAL system:

1. Articulate the theory of change
2. Identify strategies and indicators
3. Monitor performance against indicators
4. Report back and out
5. Deliberate and improve

All of these elements are carefully designed to include the voices of all relevant constituents at every stage. We particularly emphasise listening to primary constituents.

The theory of change locates a project within a wider system of change, by identifying all the factors and actors that influence the social changes being considered. Our approach calls for thinking outside a single organization to *all those who* have to do *what* to achieve and sustain those changes.

Dialogue is nurtured and continued through the steps. For instance, even the monitoring process can be used to build better relationships. The final step, deliberation, feeds back into a review of the theory of change and strategies, and the next cycle of planning, assessment and learning for improved relationships and increased impact.

Technical assistance

Working with one of the largest private funders in the world, we are collaborating in a project to provide rapid response advice on their grantees' monitoring and evaluation systems. This has included reviewing plans and working with grantees to strengthen their approaches, including enhancing constituency voice.

Feedback system design

We are setting up a pilot with a large international coffee project to help them monitor the strength of farmer groups they are working with. This aims to provide actionable management data on the governance and effectiveness of groups, from the point of view of farmers themselves. The data will be disaggregated between women and men.

To take another example, we are working with nine international networks to get comparative feedback from their members and other key constituents. Individual reports will be prepared for each network, with the aim of increasing understanding of relationships within networks and identifying areas for learning and improvement.

> *"Keystone's impact planning, assessment and learning methodology has really changed our strategic thinking and our approach to our work in a tremendous way. The Fund is experiencing a dramatic shift in its vision of success as a dynamic system and now better appreciates the key actors who are central to our organizational success."*
>
> **MOIPONE BUDA-RAMATLO, NELSON MANDELA CHILDREN'S FUND, SOUTH AFRICA**

Guides and tools

Keystone has developed a range of guides and tools to help organizations strengthen constituency voice. They are freely available and can be downloaded from our **website**. They are the product of our evolving experiences and expertise and we have tried to make them as adaptable as possible, so they can be used for a variety of contexts and purposes. They include:

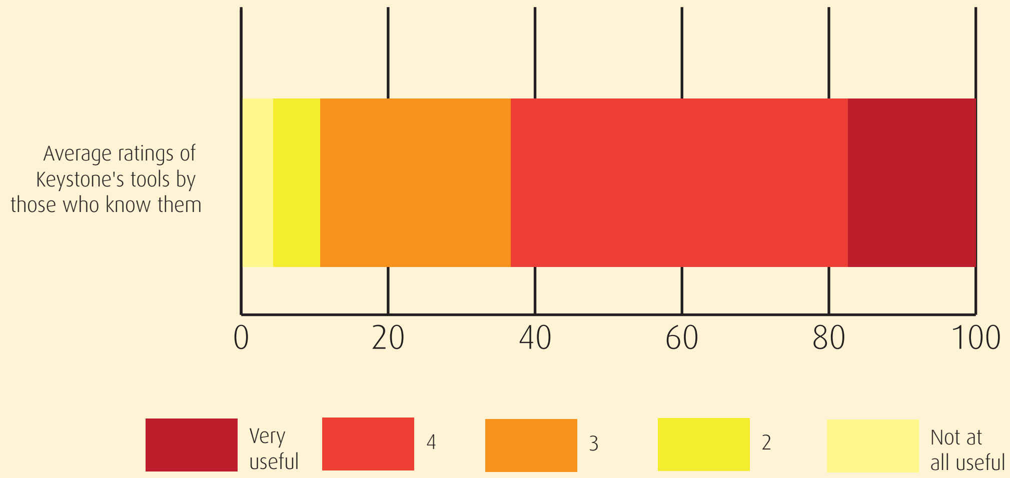
- Impact planning, assessment and learning (IPAL) - Overview and implementation guide
- Developing a theory of change guide
- Interactive theory of change building template
- Learning with constituents guide
- Ethical framework for feedback activities
- Constituency voice assessment framework

> *"The theory of change tool is one of the best we have identified for planning an impact assessment of programs which have shifting objectives and work in partnership with a range of organizations and community members."*
>
> **- A SURVEY RESPONDENT**

In our survey, we asked our constituents to rate their usefulness and the results were encouraging. An overwhelming percentage of respondents stated that they were not familiar with our tools and guides (73 percent).

From those respondents who were familiar with the tools, as can be seen from the graph below, 63.3 percent gave them a high or very high rating. If one looks only at responses of those with a significant degree of familiarity with Keystone, the approval ratings go over 83 percent.

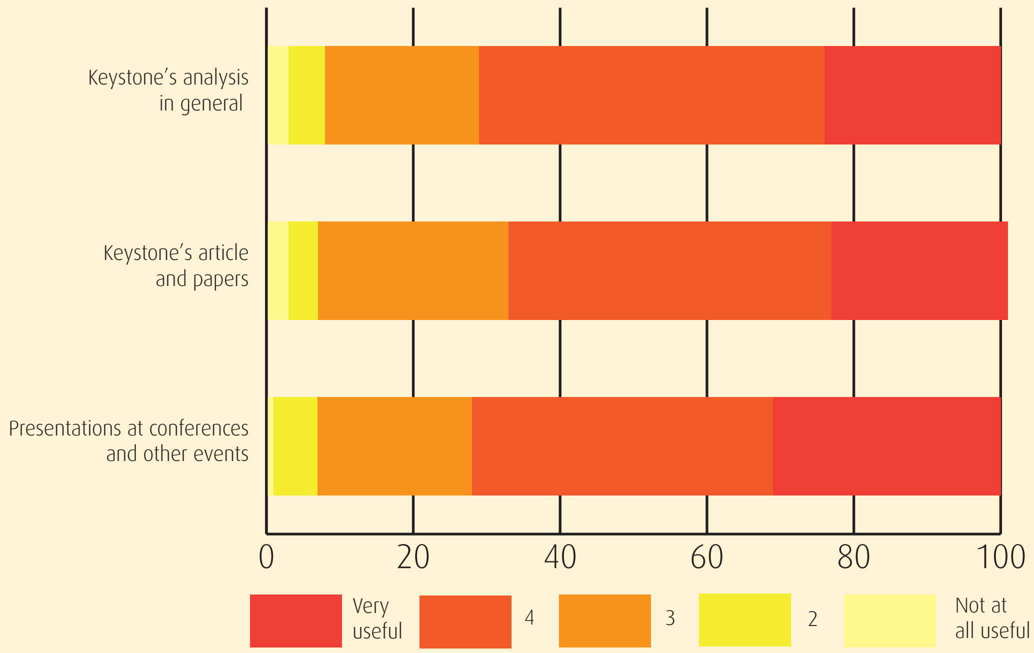
AVERAGE RATINGS OF KEYSTONE'S TOOLS BY THOSE WHO KNOW THEM



Research and analysis

In addition to our tools, we also regularly publish articles and research papers in relevant sector-wide media. Some of our publications, like the *BOND Approach to Quality Standards in NGOs* and *The 21st Century Potential of Constituency Voice*, have gained popularity and have been judged as useful and thought provoking by various actors.

KEYSTONE'S RESEARCH AND ANALYSIS



As with our tools, the longer people know Keystone, the more likely they are to value our analysis and research and assert its relevance to the development sector. We also asked respondents to evaluate those elements in our work that they are familiar with. More than two thirds of the respondents who gave ratings assessed our general analysis and our research articles and papers as useful or very useful.

"Keystone is helping to push the agenda for constituency voice through its thoughtful research and papers."

- A SURVEY RESPONDENT

However, again, the majority of respondents stated that they are not familiar with our research and publications (64 percent). The graph above shows the responses of the 46 percent of respondents who were familiar with our work. It shows that about 70 percent give us high marks. If we select those who know us well, the scores go up to 90 percent. But for us the 30 percent who are not impressed is a more significant result. We can and will do better!

Click here for a list of resources, including Keystone's guides, reports, articles and presentations.

Influence and Advocacy

We aim to position Keystone as a respected source of comment and innovation in the fields of monitoring and evaluation, feedback systems and constituency voice.

"Keystone has been a pioneer in this topic."

- A SURVEY RESPONDENT

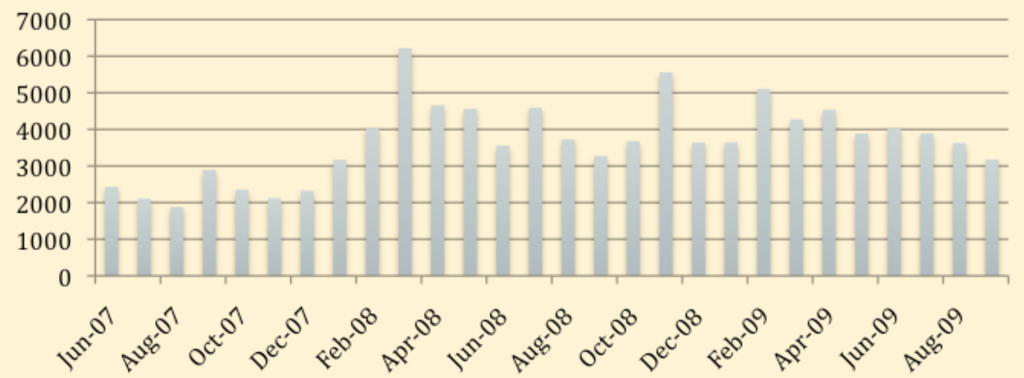
Our survey results suggest that we have been able to influence the opinions of people working in the development sector around the world, especially in the field of nonprofit consulting.

People who know Keystone are much more likely to believe that there is a link between constituency voice and improved performance of organizations working in the development sector around the world – 78 percent see the link, compared with 62 percent of those who do not know Keystone.

Use of our website

There have been **103,065** visits to **www.keystoneaccountability.org** from 1st June 2007 to 30th September 2009. The average number of visits per month was 2,300 in 2007, 4,220 in 2008 and 4,019 in 2009.

WEBSITE VISITS



Most popular downloads	1 Jan - 30 Sept 09		1 Jan - 31 Dec 08	
	Position	Downloads	Position	Downloads
Online Philanthropy Markets	1	723	1	2293
Developing a Theory of Change	2	655	2	781
IPAL Guide	3	651	-	-
Downward accountability to 'beneficiaries': NGO and donor perspectives	4	372	3	683
The Changing Face of NGO Accountability: A Talk at the International Seminar on Civil Society and Accountability	5	339	4	597
Annex: NGO Accountability – Initiatives and Papers	7	163	-	-
Learning with constituents guide	8	133	6	351
GBF IPAL Metrics framework	9	127	-	-
Capabilities profiler	10	121	5	444
Total		**3,508**		**5,149**

This table shows a baseline for use of the terms "constituency voice" and "impact planning, assessment and learning". At the moment, three major internet search engines show that the vast majority of online references to these terms are generated directly by Keystone. We hope to see this change in the future, if and when as more organisations start to use these terms.

Top 20 results on search engines for the following terms	Keystone related	Social Change context	Other contexts	Date
"Constituency voice"				
Google	16	3	1	27-Oct-09
Bing	16	3	1	27-Oct-09
Yahoo	13	2	5	27-Oct-09
"Impact Planning, Assessment and Learning"				
Google	17	3	0	27-Oct-09
Bing	18	2	0	27-Oct-09
Yahoo	18	2	0	27-Oct-09

Room for Improvement

While we are broadly encouraged by our results to date, we – and more importantly you! – see a lot of room for improvement. As noted above, the lower scores are a valuable reminder of the challenge in front of us. The survey results identified the following specific areas.

- We should be more systematic in the way we collect feedback from our constituents, especially those in the developing world. We have plans to do so through the implementation of our internal impact planning, assessment and learning system, starting this year.
- An overwhelming number of survey respondents stated that they were not familiar with our tools and publications. We received many suggestions for better dissemination of our work. We will think about this carefully and formulate an appropriate response.
- Some of our constituents have challenged how much of our work on constituency voice is really innovative. We are keenly aware that a lot of work has already been, and continues to be, done by other organizations in the field and that we are building on the existing practices of participatory development. We will improve our public acknowledgements of their work.

  We also believe that Keystone's approach is additive in at least three ways:
  - **Systematic**. We provide methods for constituency voice to be implemented systematically across all programs and integrated with other management operations (including planning, monitoring, assessment and reporting results).
  - **Comparative.** Taking a leaf from the customer satisfaction industry, we develop *comparative* feedback. This helpd intepret data by allowing benchmarking and comparisons (for instance with peer organisations) that can drive action. We aim to contribute to publicly available data sets for sector-wide benchmarking.
  - **Theory and practice of public reporting.** We provide the theory and practice for validating an organization's results, including feedback, by reporting back feedback to those who provided it. This adds the weight of deliberation to feedback, identifies improvements, and, when subsequently reported out publicly contributes to wider learning.

None of these are unique innovations in themselves, though each has new elements in the social change sector. We have come across no other organization that has brought them all together, as a system-wide response to the challenges of accountability, from planning to assessment to reporting, in ways that recognize the roles of all constituents.

- It has been brought up that our work is filled with jargon and is not always accessible to different audiences. Internally, we have also identified the need to simplify the language we use in our communications. As a start, we have recently launched a new, more user-friendly website.

- We had a disappointingly low level of comment on the draft report. Even though a public comment period was set and all 620 survey respondents were invited to provide feedback on the first draft of this report, we only received four responses and these came in via email rather than through the website comment function. We do not take silence to be consent in this case and over the coming months we undertake to explore how we can create a more genuine dialogue with our constituents about our work.

Stewarding Our Resources

This financial summary presents the unaudited combined financial reports from the three legal Keystone entities for the financial year to 31 March 2008. For the most recent audited financial reports of the individual agencies, please see our website at: **http://www.keystoneaccountability.org/about/publicreport**

Incoming Resources			
X/rate 1USD$ = 0.59 GBP£	Unrestricted Funds $	Restricted Funds $	Total Funds $
Grants	270,662	637,464	908,126
Donations	121,553	-	121,553
Fee based income	351,305	-	351,305
Total Incoming Resources	743,520	637,464	1,380,984

Resources Expended				
	Cost of Generating Funds $	Project Costs $	Governance Costs $	Total 2009 $
Staff Costs	26,981	543,007	8,198	578,186
Other Costs	-	258,894	-	258,894
Audit fees		-	12,475	12,475
Accountancy fees	-	-	2,231	2,231
Total Expenditure	**26,981**	**801,901**	**22,904**	**851,786**

	Unrestricted Funds $	Restricted Funds $	Total Funds $
Net Incoming Resources	56,483	421,841	478,324
Fund Balances at 1 April 2008	63,754	-	63,754
Fund Balances at 31 March 2009	120,237	421,841	542,078

Our Partners

The nature of Keystone's mission is such that we can only succeed if we build strong relationships and networks of shared purpose and values. As can be seen from the lists below, there is a significant amount of overlap between our funders, co-implementers and clients. We recognize our diverse partnership roles as a strategic asset that enables us to mediate between the frequently divergent perspectives (but not interests!) of those who give and those who receive funding.

Funders (2004-2009)

$1,000,000 +
- The William and Flora Hewlett Foundation

$500,000 +
- Bill and Melinda Gates Foundation (via the Institute of Development Studies and Alliance for Children and Families)
- Omidyar Network

$200,000 +
- Ford Foundation
- Metanoia Fund
- United States Agency for International Development

$100,000 +
- International Development Research Centre (via iScale)

$50,000 +
- Aspen Institute
- David and Lucile Packard Foundation (via Alliance for Children and Families)
- Christopher Finn

$25,000 +
- John E. "Jack" Lange

$15,000 +
- Rockefeller Foundation (via iScale)
- Excelsior Fund (via iScale)

$10,000 +
- Tom Walker

$5,000 +
- Asad Azfar

$500 +
- Jeffrey Norman

METANOIA FUND

Metanoia is one of only three foundations that have provided general support grants to Keystone. Unlike the others, Hewlett and Omidyar, Metanoia is not a professionally staffed foundation with a programmatic interest in strengthening philanthropy and impact systems. It is a family foundation led by a visionary philanthropist, Ralph Taylor, and currently grants approximately $300,000 per year (more in the past).

Taylor and Metanoia punch well above their weight. In the past few years, Taylor has been either the first funder or a very early catalytic investor for **Root Capital**, **Greenhouse Gas Protocol Initiative**, **Global Reporting Initiative** and **Access Initiative**. Each of these has grown from promising idea to significant global actors in their areas of work.

Metanoia is the Greek word for repentance, specifically the change of mind that is brought about through repentance. Ralph Taylor, a graduate of the Harvard Divinity School, has his own definition. "Metanoia is about knowing how much you are loved and how far you have to go to do justice to that love."

It is not hard to trace this understanding through Metanoia grants. All of the organizations listed above create new ways for people to come together across the barriers of mind and institution and circumstance and power that ordinarily divide them, to see the world together in a new way. Keystone is simultaneously humbled and inspired to be welcomed into the Metanoia family.

Co-Implementers

- Alliance for Children and Families
- British Overseas NGOs for Development (BOND)
- Center for Effective Philanthropy (CEP)
- Centre for Applied Social Research, Royal Melbourne Institute of Technology
- Charity Navigator
- Evaluation Network
- Bill and Melinda Gates Foundation (Agriculture Development Program)
- Georgetown University
- Institute of Development Studies (IDS)
- International Development Research Centre
- iScale - Innovations for Scaling impact
- LTL Strategies
- Nelson Mandela Foundation
- Oxfam International
- The Rockefeller Foundation
- Social Venture Technology (SVT) Group
- Sustainability Institute

Clients

- Acumen Fund
- Aflatoun
- African Monitor, South Africa
- British Overseas NGOs for Development (BOND)
- Centro de Educação e Documentação para Ação Comunitária (CEDAC)
- CIVICUS: World Alliance for Citizen Participation
- Comic Relief
- Countdown 2010 (IUCN)
- Bill and Melinda Gates Foundation (under sub contract to Alliance for Children and Families)
- Gender at Work
- Global Network of Civil Society Organizations for Disaster Reduction
- Grassroots Business Fund
- The WK Kellogg Foundation's Southern Africa Integrated Rural Development Programme (IRDP)
- Healthcare without Harm
- Humanist Institute for Development Cooperation (Hivos)
- Humanity United
- International Centre for Trade and Sustainable Development (ICTSD)
- International Land Coalition (ILC)
- Nelson Mandela Children's Fund, South Africa
- Nelson Mandela Foundation
- Oxfam International
- Pact
- Poverty and Economic Policy Research Network (PEP-net)
- Red Mercosur de Investigaciones Económicas
- The Renewable Energy and Energy Efficiency Partnership (REEEP)
- The Rural Enterprise Development Initiative (REDI)
- The Social Change Assistance Trust (SCAT), South Africa
- Synergos Institute