

Key Findings and Recommendations from The California Wellness Foundation 2017 Grantee and Applicant Perception Report

Prepared by The Center For Effective Philanthropy

In February and March of 2017, The Center for Effective Philanthropy conducted a survey of The California Wellness Foundation’s (“Cal Wellness” or “the Foundation”) grantees and declined applicants, achieving a 73% and 41% response rate, respectively. The memo below outlines CEP’s summary of key strengths, opportunities, and recommendations. Cal Wellness’s grantee and declined applicant perceptions should be interpreted in light of the Foundation’s goals and strategies.

This memo accompanies the comprehensive survey results found in the Foundation’s interactive online report at <https://cep.surveymresults.org> and in the downloadable online materials, which contain a .pdf copy of the full report and set of respondent comments.



In general, The California Wellness Foundation’s grantees rate higher than grantees of the typical funder in CEP’s dataset for most measures throughout this report. In particular, the Foundation’s understanding of grantees’ fields, strategy and goals, factors that affect grantees’ work, and intended beneficiaries’ needs are areas of strength.

The Foundation’s declined applicant ratings are similar to ratings of the typical funder in CEP’s dataset across most measures.

Positive Perceptions of Impact on Grantees’ Fields

- Grantees rate Cal Wellness higher than typical for the Foundation’s impact on and understanding of their fields.
 - Cal Wellness is also rated higher than typical for its advancement of knowledge in the field and in the top 15 percent of CEP’s dataset for its effect on public policy.
- When asked to provide comments about the Foundation’s impact, many grantees reference the Foundation’s unique leadership position in the field.
 - One grantee says, “Cal Wellness is a consistent leader in the field of California philanthropy, and has made significant and strategically smart investments to further its mission and goals.”
 - Another grantee describes, “...Policy and advocacy work is clearly a priority of the Foundation and it was encouraging to know that TCWF is working with its grant recipients to challenge and encourage them to be more thoughtful and intentional with their impact. That conversation alone made our team think deeper about how we are leveraging our partnerships and knowledge to impact our field in a systemic way.”



“The California Wellness Foundation has had a significant impact on our field and the community we serve. The Foundation has demonstrated a commitment to building safe, healthy communities, and increasing pathways to education and employment for system-involved young people...” -Grantee



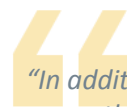
“... [Cal Wellness’s] support has enabled [us] to increase expertise in the field, and [provided] substantial capacity to leverage other financial and collaborative resources to the communities.”-Grantee

Deep Understanding of Grantees and a Desire for Further Assistance Beyond the Grant

- Cal Wellness’s grantees rate the Foundation higher than typical for its impact on their organizations, and in the top 15 percent of CEP’s dataset for its ability to help grantees sustain the work funded by the grant.
- Grantees’ ratings also place the Foundation in the top 25 percent of funders for its understanding of grantees’ organizational strategy and goals, awareness of grantees’ challenges, and its understanding of the social, cultural, and socioeconomic factors that affect grantees’ work.
- Based on grantees’ ratings and comments, there is an opportunity to build on the Foundation’s deep understanding of grantees and strengthen their work by providing additional assistance beyond the grant.
 - A typical proportion of grantees (15 percent) report receiving the intensive patterns of non-monetary assistance from the Foundation that CEP categorizes as “comprehensive” or “field-focused.” Grantees who receive these intensive patterns of assistance rate significantly higher on most measures throughout the report.
 - Nearly a quarter of grantees’ suggestions ask for additional non-monetary assistance, with grantees specifically requesting increased collaboration, assistance procuring funding from sources outside the Foundation, support for capacity building, and convening grantees.
 - When asked what types of non-monetary support grantees would like to receive more of in the future, the highest proportion of grantees ask for the Foundation to share stories about their work through the Foundation’s communications vehicles (88 percent), general organizational management (86 percent), and introductions to other funding sources (67 percent).



“Cal Wellness is one of the truly great foundations in this state. It listens to its grantees in a way that is rare in the field. Its willingness to fund ongoing operating costs is indispensable to sustaining programs, and again, is rare in the foundation world....” -Grantee



“In addition to the great work Cal Wellness is currently doing, it will be beneficial that the Foundation expand its services in providing capacity building training to help non-profit[s] achieve long term sustainability.” -Grantee

Strong Transparency and Clarity, with an Opportunity to Build on Helpful Interactions

- CEP’s research finds that strong funder-grantee relationships – defined by high quality interactions and clear, consistent communications – is the strongest predictor of grantees’ perceptions of impact on their fields, communities, and organizations.
 - Grantees rate the Foundation similar to grantees of the typical funder for the overall strength of their relationships with Cal Wellness.
 - While Cal Wellness receives typical ratings for most aspects of its interactions and communications with grantees, the Foundation is rated more positively than typical for the clarity of its communications, overall transparency, and grantee perceptions of fairness.
- Grantees’ feedback suggests an opportunity to further strengthen relationships through increased responsiveness and interactions with Foundation staff.
 - Cal Wellness is rated just similar to the typical funder for the responsiveness of staff, and 22 percent of grantee suggestions relate to more frequent contact, increased responsiveness, and additional site visits.
 - Just under a quarter of grantees (a typical proportion) report interacting with their program officer yearly or less often, and these grantees rate significantly lower across most aspects of their relationships with the Foundation.
- Cal Wellness declined applicants rate similar to declined applicants of the typical funder for all aspects of their interactions and communications with the Foundation.
 - Similar to the theme in grantee comments, nearly a quarter of declined applicant suggestions also relate to increasing responsiveness and the frequency of interactions with the Foundation.

“Cal Wellness processes and communications have been extremely helpful and valuable. The insight and vast knowledge that the Foundation staff has... is very helpful and inspiring.” -Grantee

“California Wellness staff has gotten to be much less accessible and responsive in the past few years.” -Applicant

Helpful Processes, with Opportunities to Consider Additional Feedback to Grantees and Applicants

Grantees

- Grantees report spending a typical amount of time on the Foundation’s selection and proposal process, and rate the overall helpfulness of the process similar to grantees of the typical funder.
- When asked about the reporting process, grantees’ ratings trend higher than typical for the extent to which the process was straightforward, relevant, adaptable, and aligned appropriately with the timing of grantees’ work.
- CEP’s broader research finds that grantees who report discussing their report or evaluation with their funder perceive the reporting or evaluation process to be significantly more helpful.

- A lower than typical proportion of grantees (43 percent) indicate having a substantive discussion with the Foundation regarding submitted reports.
- Grantees who report having these discussions rate significantly higher on several measures throughout the report, including the strength of their relationship with the Foundation, the Foundation’s understanding of beneficiaries’ needs, helpfulness of the selection process, and transparency.

Declined Applicants

- A typical proportion of declined applicants (89 percent) indicate they would apply to the Foundation again.
- Declined applicants rate the overall helpfulness of the selection process similar to applicants of the typical funder, and Cal Wellness receives higher than typical ratings for the helpfulness of its feedback and advice in strengthening declined applicants’ future proposals.
- A larger than typical proportion of declined applicants (25 percent) requested feedback from the Foundation, but did not receive any.
 - When asked whether someone from their organization spoke to a staff member regarding the content of their LOI, 41 percent of declined applicants indicated they did not speak to a staff member, but would have liked to.
 - Declined applicants who received feedback rate significantly higher on most measures throughout the report, including the accessibility of the Foundation to applicants, responsiveness, and the Foundation’s understanding of applicants’ fields, communities, and organizations.
 - The largest proportion of declined applicants’ suggestions ask for more discussions regarding proposals, as well as additional information and clarity for funding guidelines.



“Proposal instructions were clear and thorough, which made writing it easier than many other grant proposals. It felt like our grant officer was an ally in the application process and provided guidance to help us craft a successful proposal...” -Grantee



“I feel a clear explanation should be given as to why the LOI was declined and perhaps some guidance for a successful outcome to help the organization, should they decide to apply in future.” -Applicant

CEP Recommendations

- Given the Foundation’s leadership position in the field and deep understanding of its grantees, consider the Foundation’s strategy to provide further comprehensive or field-focused assistance beyond the grant in order to strengthen grantees’ work.
- Set clear expectations with grantees and declined applicants about the level responsiveness and frequency of interactions they should expect with Cal Wellness, while identifying situations where it may be beneficial for Foundation staff to engage more frequently.
- Discuss approaches to increase available staff capacity for substantive discussions about submitted reports.
- Consider the potential benefits of, and the Foundation’s capacity to, provide more declined applicants with specific feedback on their proposals when requested.

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