

# Key Findings and Recommendations from the California Wellness Foundation 2023 Grantee and Applicant Perception Report

Prepared by the Center for Effective Philanthropy

---

*In February and March of 2023, The Center for Effective Philanthropy conducted a survey of California Wellness Foundation's (referred to as "the Foundation" or "Cal Wellness") grantees and declined applicants, achieving a 52% and 24% 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 in the Foundation's interactive online report at <https://cep.surveymethods.org> and in the downloadable online materials, including respondents' written comments. The Foundation's full report also contains more information about survey analysis and methodology.*

---

## Positive Perceptions of Impact

- ▶ As in 2017, both grantees and applicants provide ratings in line with the typical funder for the extent to which Cal Wellness has an impact on their fields and communities. One grantee, for example, describes the Foundation as, "forward-thinking. It sees and anticipates needs that we feel at the community level but that have not yet fully been integrated into state response."
  - When asked in a custom question about the extent to which Cal Wellness actively uses its voice to influence organizations, the highest rated options by both grantees and applicants were nonprofits and philanthropies (e.g., funders, philanthropy serving organizations).
- ▶ In addition, grantees continue to view the California Wellness Foundation as having a higher than typical influence on public policy in their fields, placing the Foundation in the top 20 percent of funders in CEP's comparative dataset.
  - The Foundation also receives typical ratings for the extent to which grantees feel Cal Wellness has advanced the state of knowledge in their fields.
  - In their written comment, one grantee suggests Cal Wellness could "amplify impact on the nonprofit sector more effectively [by seeking] opportunities for collaborative partnerships with other funders, philanthropic organizations, and stakeholders."

## Solid Impact on Grantees' Organizations with Room to Grow Assistance Beyond the Grant

- ▶ Grantee ratings for the Foundation's organizational impact continue to be typical, though the Foundation's grantmaking characteristics have shifted slightly over time.
  - At the median, Cal Wellness grants have increased since 2017 and continue to be larger than those at the typical funder in CEP's dataset - \$250K compared to \$110K. Grant sizes are in line with those at the typical funder in its custom cohort.

- Despite a significant decline since 2017, a larger than typical proportion of grantees (79 percent) continue to report receiving multi-year grants, and the Foundation’s average grant length of 2.4 years places the Foundation above the typical funder in its custom cohort.
- Nearly 60 percent of Cal Wellness grantees report receiving unrestricted funding, placing the Foundation near the top 10 percent of CEP’s comparative dataset.
- ▶ When it comes to assistance beyond the grant, a smaller than typical proportion of Cal Wellness grantees report receiving non-monetary support – 35 percent compared to 59 percent at the typical funder.
  - A fifth of grantees’ written suggestions relate to the provision of more non-monetary support – the second most common topic. Grantees primarily request, for example, opportunities “to gather to share their work and network among grantees on a city as well as regional and statewide basis” and other potential convenings (N=16).



Grantee: *“Cal Wellness is a leader, in California and perhaps more widely, in 1) advancing equity and doing the work to help break down systems of oppression; and 2) a true pioneer for the nonprofit sector with its informed and impactful grantmaking strategy.”*



Grantee: *“Cal Wellness has the unique vantage point of supporting organizations, projects, and advancing policy in many different ways that profoundly impact communities of color while promoting equity and inclusion. Cal Wellness’ ability to convene, uplift community voice, and engage with community leaders is transforming California.”*

## Drop in Relationships Ratings from Grantees and Applicants

- ▶ When compared to 2017, grantee ratings for the Foundation’s responsiveness, approachability, and openness to ideas from grantees have significantly decreased and are now lower than typical.
  - While grantee ratings are typical for the extent to which the Foundation exhibits compassion for those affected by funded work and trust in their staff, Cal Wellness receives lower than typical ratings for the extent to which grantees feel the Foundation exhibits candor about its perspectives on grantees’ work and engages in respectful interaction.
- ▶ Importantly, there have been significant declines in grantees’ ratings of the Foundation’s understanding of their fields, communities, and organizations since 2017. Ratings are now lower than typical for Cal Wellness’ understanding of grantees’ fields and organizations, while typical for understanding of grantees’ communities.
  - Grantee ratings have also significantly decreased for the Foundation’s understanding the social, cultural, or socioeconomic factors that affect their work and its understanding of the needs of the people and communities that grantee organizations serve, though ratings remain similar to those at the typical funder.

- ▶ Grantee feedback points to crucial shifts in interaction patterns since 2017 that are affecting their experiences with the Foundation. Specifically:
  - Grantees report experiencing significantly more contact change, with over a quarter – a larger than typical proportion – reporting that their main contact had changed in the past six months. These grantees provide significantly lower ratings across many measures of the report, such as their comfort approaching the Foundation, staff responsiveness, and measures relating to the Foundation’s communications.
  - Cal Wellness grantees report experiencing significantly less contact with their program officer, with about half of grantees – over two times as many as at the typical funder – now reporting only interacting with their program officer yearly or less often. More grantees also indicate that they most frequently initiate contact with their program officer. Those who report more frequent and reciprocal initiation of contact provide significantly high ratings across most themes in the report, including impact, understanding, communications, and interactions.
  - Site visits are another touchpoint that are associated with more positive grantee perceptions: the roughly half of grantees who received site visits provide higher ratings for the Foundation’s impact on and understanding of grantees’ fields, communities, and organizations and the quality of relationships.
- ▶ Of grantees’ written suggestions about how the Foundation could improve, over a quarter mentioned aspects of the Foundation’s interactions. One grantee, for example, asks that the Foundation “engage the grantees more often, probably every other month just to discuss any new challenges or opportunities,” while another writes, “increase and improve program officer communications with grantees. Don’t allow relationships to lapse because of internal transition.”

### Applicant Experiences

- ▶ This pattern of less positive grantee perceptions of the quality of the Foundation’s relationships also generally holds true for applicant perceptions. Applicant ratings for staff responsiveness are now in the bottom 20 percent of the overall dataset, and ratings have trended down since 2017 for how fairly applicants feel treated.
- ▶ While applicants provide typical ratings for the Foundation’s understanding of their fields, communities, and contexts, they perceive Cal Wellness to be less aware than typical about the challenges their organizations are facing.



Applicant: *“We met with a staff member at the Foundation...[and it] felt like a positive meeting. It was then many months before we had a follow-up meeting where we continued to have a positive conversation...People were responsive, but I think the interactions lacked clarity for us about what was the best path forward...”*

### Opportunities to Clarify Communications and Consistency of Information

- ▶ Grantees provide significantly lower ratings than in 2017 – and now lower than typical – for the Foundation’s clarity and consistency of communications and for its overall transparency.

- Grantees also provide lower than typical for their understanding of how their funded work fits into the Foundation’s broader efforts, and nine grantees ask for a clearer connection in their written suggestions.
- ▶ While generally steadier over time, applicants also provide lower than typical ratings for the clarity and consistency of the Foundation’s communications and its overall transparency.



Grantee: *“It can be difficult to figure out what is happening inside the Foundation or where our grant fits in priorities. We’ve asked for information several times for planning purposes, and usually hear that things are changing and info will be provided at a later point.”*



Applicant: *“Communicate with organizations who want to understand your goals and interests better so as to align the appropriate projects with the funding requests.”*

## Selection and Reporting Processes

### Right-Sized, Clear, and Helpful Processes for Grantees

- ▶ Cal Wellness grantees feel that the selection process was an appropriate amount of effort – providing typical ratings – and report a lower than typical median number of hours spent on the process, resulting in a very high dollar return.
- ▶ Grantees provide higher than typical ratings for the helpfulness of the selection process as an opportunity to strengthen the efforts to which the grant funding was directed towards, and grantees also find the selection process to be clear and transparent about the requirements and timeline and the criteria utilized for deciding whether their proposal would be funded or declined.
- ▶ When it comes to the reporting process, grantees provide typical ratings for the extent to which the process was straightforward, adaptable to fit their circumstances, relevant to the work funded by the grant, and a helpful opportunity for them to reflect and learn.
  - In their written comments, grantees write that the reporting process was, “clear and straightforward,” and that overall, “[p]rocesses are primarily well-structured and organized.”

### Applicants Utilize Written Resources and Request More Feedback

- ▶ Like grantees, applicants provide higher than typical ratings for the helpfulness of Cal Wellness’ selection process – a significant increase since 2017. Applicants report spending fewer hours than is typical on the selection process and find it to be an appropriate amount of effort for the funding requested.
- ▶ In contrast, applicants rate lower than applicants at the typical funder for the extent to which the Foundation was clear and transparent about the process, providing ratings near the midpoint on the 1-7 scale.
- ▶ The majority of Cal Wellness applicants apply based on reading the Foundation’s guidelines, and a lower than typical proportion of applicants had contact with a staff member before applying.

Perhaps relatedly, the most commonly known Foundation resources and/or activities by far are its “How to Apply” page and descriptions of what it does funds and doesn’t fund on its website.

- Applicants rate these two resources, along with examples of funded grants, as the three most helpful Foundation resources.
- ▶ Nineteen percent of applicants, compared to only 11 percent at the typical funder, indicate that they did not receive a reason or explanation about declination. Applicants who received a reason provide typical ratings for the extent to which they felt the reason for declination was honest.
- ▶ Furthermore, 40 percent of applicants, an increase from 2017, report requesting feedback but not receiving it.
  - Requests for feedback comprise almost a quarter of applicant suggestions for the Foundation. Applicants note the lack of feedback, writing “we never received responses to our multiple requests for feedback,” “lack of follow up on promise of feedback was a disappointment,” and that “any feedback is better than none.”
  - Those who did receive feedback provide typical ratings for its helpfulness in strengthening future proposals to Cal Wellness.
- ▶ Nonetheless, nearly 90 percent – a typical proportion – plan to apply again in the future.

## Justice, Equity, Diversity, and Inclusion

- ▶ Ratings affirm the Foundation’s intentionality with justice, equity, diversity, and inclusion (JEDI), with grantees and applicants both rating Cal Wellness similar to or higher than typical for all four measures in the survey related to the Foundation’s commitment to and communications about JEDI.
- ▶ Furthermore, over 90 percent of grantees and applicants report that the efforts funded by their grant are meant to primarily benefit or would have been directed toward historically disadvantaged groups.
  - In addition, Cal Wellness’ portfolio is more diverse than typical, with larger than typical proportions of grantees and applicants who identify as a person of color. The proportion of first-time applicants, especially POC-led applicants, has also increased since 2017 and is now larger than typical.
- ▶ Yet, in CEP’s standard analyses of ratings by respondent demographics characteristics for both grantees and applicants, one consistent difference emerged.<sup>1</sup> Despite no differences in organizational characteristics, interaction patterns, or grant characteristics, grantees who identify exclusively as women provide significantly lower ratings than grantees who identify

---

<sup>1</sup> In analyses examining differences in grantee ratings, there were no differences in ratings by person of color identity, intersectional identity, disability identity, and LGBTQ+ identity. In analyses examining differences in applicant ratings, there were no differences by gender identity, person of color identity, intersectional identity, and disability identity. There were too few respondents to run analyses by transgender identity for both grantees and applicants, and for applicants, too fewer responses to run analyses by LGBTQ+ identity. More details about the methodology and findings can be found on the Respondent Demographics page in the full online report.

exclusively as men across many measures in the report. Measures include, but are not limited to the Foundation's:

- Impact on and understanding of fields and organizations,
- Clarity, consistency, and transparency of communications,
- Responsiveness, approachability, and openness to grantees' ideas,
- Commitment to and communications about justice, equity, diversity, and inclusion.

## Recommendations

Based on its grantee feedback, CEP recommends that California Wellness Foundation consider the following in order to build on its strengths and address possible areas for improvement:

- ▶ Reflect on how changes since 2017 may be showing up in this set of results. Discuss factors that have contributed to strong, steady ratings related to the Foundation's effect on public policy, advancement of knowledge, and impact on grantees' fields and communities.
- ▶ Recognizing the larger than typical number of recent contact changes and the importance of touchpoints with Foundation staff for interactions and communications, work collaboratively to identify grantees who have had less contact with Cal Wellness in recent months. Make plans to have follow-up conversations with goals of establishing a primary point of contact, sharing information about the Foundation's goals and priorities, and listening to grantees' successes, challenges, and needs.
  - Moving forward, consider developing a formal process for grantee hand-offs to reduce the losses in understanding on both sides.
- ▶ Celebrate grantees' and applicants' positive perceptions of the Foundation's clear commitment to and communications about justice, equity, inclusion, and diversity, and build upon that commitment by unpacking the gap in grantee experiences for women.
- ▶ Building on the improvements to the helpfulness and streamlined nature of Cal Wellness' selection process, consider updates to better help applicants submit successful applications, such as providing feedback when requested, continuing to refresh the written resources on the Foundation's website, and clarifying whether an organization should apply again.

## Contact Information

**Alice Mei**  
Manager, Assessment and Advisory Services  
[alicem@cep.org](mailto:alicem@cep.org)

**Pranathi Posa**  
Analyst, Assessment and Advisory Services  
[pranathip@cep.org](mailto:pranathip@cep.org)