

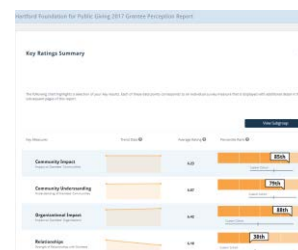
Key Findings and Recommendations from the Hartford Foundation for Public Giving 2017 Grantee Perception Report

Prepared by The Center For Effective Philanthropy

In May and June of 2017, The Center for Effective Philanthropy (“CEP”) conducted a survey of the Hartford Foundation for Public Giving (“HFGP” or “the Foundation”) grantees, achieving a 68 percent response rate.

The memo below outlines the key findings and recommendations from the Foundation’s Grantee Perception Report (“GPR”). HFGP grantee perceptions should be interpreted in light of the Foundation’s goals, strategy and context. This memo accompanies the comprehensive survey results found in the interactive online report at <https://cep.surveymresults.org> and in the downloadable online materials.

In this report, responses are shown benchmarked to the responses of more than 50,000 grantees in CEP’s grantee dataset. References to the Foundation’s custom cohort refer to the 18 funders in HFGP’s custom cohort, a secondary benchmarked comparison point of a smaller group of funders, selected by the Foundation, that are more similar to HFGP in scale, scope and approach.¹



The full report also contains more information about survey analysis and methodology.

Overview

HFGP grantees provide ratings that are, overall, similar to the typical funder in CEP’s dataset. Key strengths for the Foundation include its impact on both grantees’ local communities and organizations, and its provision of valuable assistance beyond the grant.

Ratings are, on the whole, similar to the typical cohort funder and exceptions are noted below. Ratings are also similar, overall, to the Foundation’s 2006 report. Finally, ratings do vary somewhat by Program Area; these differences can be explored more fully in the online interactive report.

Continued Positive Perceptions of Community Impact

Grantee feedback paints a picture of strong HFGP impact on grantees’ local communities.

- Ratings from grantees are higher than typical, and higher than the typical cohort funder, for both the Foundation’s understanding of and impact on grantees’ local communities.

¹ HFGP selected the following group of 18 funders for its custom cohort: California Community Foundation, Eugene and Agnes E. Meyer Foundation, Hartford Foundation for Public Giving, Hawai’i Community Foundation, Marin Community Foundation, New Hampshire Charitable Foundation, Rhode Island Foundation, The Boston Foundation, The California Wellness Foundation, The Chicago Community Trust, The Cleveland Foundation, The Community Foundation for Greater New Haven, The Greater Cincinnati Foundation, The Minneapolis Foundation, The Philadelphia Foundation, The Pittsburgh Foundation, The Saint Paul Foundation, and The Weingart Foundation.

- Nevertheless, grantees rate HFPG lower than typical for the extent to which HFPG understands both the context in which they work and the needs of their intended beneficiaries.
- Relative to the full comparative dataset, ratings are typical for perceptions of HFPG’s impact on grantees’ fields of work, though higher than typical relative to the typical cohort funder.



“[HFPG] is now more in-tune with the community and with my organization than in the past.”



“The Foundation’s impact on the community is unrivalled in this region.”

Strong Impact on Grantees’ Organizations & Valuable Supports Beyond the Grant Check, With Opportunity to Deepen Understanding

Another clear strength of HFPG is strong impact on grantee organizations and valuable provision of supports beyond the grant check. As is the case in CEP’s broad research, grantee experiences do vary based on the Foundation’s grantmaking characteristics.

- Ratings for HFPG’s impact on grantees organizations are higher than typical, and are near the top of the Foundation’s custom cohort.
- Ratings are lower than typical, however, for the Foundation’s understanding of grantees’ strategy and goals. Notably, in CEP’s broader research, grantees’ ratings for this measure are a strong predictor of the strength of the funder-grantee relationship.
- Relatedly, grantees provide typical ratings for the Foundation’s awareness of their organizational challenges (though higher compared to the typical cohort funder) and for the extent to which HFPG improves their ability to sustain-the grant funded work in the future.
- In a custom question, approximately two-thirds of grantees indicate that the topic of the current economic climate is coming up conversations with a Foundation staff member.
 - Those reporting having these conversations perceive them as moderately helpful, and provide more positive ratings on many survey measures, and the overwhelming majority of grantees express interest in exploring this topic with Foundation staff.

Valuable Supports Beyond the Grant Check

- Compared to the typical cohort funder, the Foundation provides a higher proportion of its grantees with intensive patterns of non-monetary assistance. The proportion of grantees receiving these intensive patterns of supports is similar to the typical funder in CEP’s dataset.
- Importantly, grantees receiving these intensive patterns of assistance provide more positive ratings on many survey measures, including aspects of HFPG’s impact on and understanding of their fields and organizations, and aspects of their relationships with HFPG. This is consistent with CEP’s research.
- When asked a custom question about the importance of various roles that HFPG plays beyond its grantmaking, grantees rate HFPG’s roles as a convener and creator of collaboration of stakeholders as most important to their organizations.
 - Notably, a higher than typical proportion of grantees report that HFPG provided seminars/forums/convenings – 35 percent, relative to 22 percent at the typical funder and 18 percent at the typical cohort funder.
- In a custom question asked only of grantees who indicate they receive support from the Foundation’s Nonprofit Support Program, over 95 percent of respondents, indicate that this program has had significant positive impact on their organization, rating its impact a five or higher.



“The Foundation could...spend more time...learning first-hand some of the challenges non-profit face, not just financial, but also structural and capacity-wise.”



“...They have helped us to transform the organization through their funding, technical assistance, and ongoing trainings offered through the Non-Profit Support program. Our capacity has been tremendously impacted by HFPG.”

Grantmaking Patterns

- As context, HFPG provides longer grants, though they are of similar size relative to other funders. Notably, HFPG provides less general operating support and more technical assistance/capacity building grants than both the typical funder and typical cohort funder.
- Grantee experiences and perceptions do vary based on grantmaking characteristics.
 - CEP’s research also shows that multi-year, six-figure, general operating support grants are associated with more positive perceptions of impact on grantees’ organizations and sustainability. Fourteen percent of HFPG’s grants fit in this pattern and these grantees provide more positive ratings than others for HFPG’s impact on their fields, organizations and many other survey measures.
 - Thirteen percent of grantees report receiving general operating support, a proportion lower than both the typical funder and typical cohort funder. Grantees who receive this support rate significantly higher on many survey measures, including HFPG’s impact on and understanding of their organizations, and aspects of their relationships with the Foundation when compared to grantees receiving other types of support.
 - Sixty-eight percent of grantees, higher than both the typical funder and typical cohort funder, indicate that HFPG has funded them consistently over time receiving consistent funding from HFPG over the past. These grantees rate significantly higher for most survey measures, which is in line with other funders across CEP’s dataset.
- A top suggestion from grantees (comprising 18 percent of suggestions) relates to HFPG’s grantmaking characteristics. Grantees, for example, request longer grants, more consistent funding support, and changes to HFPG’s grantmaking restrictions to support smaller and/or state-wide organizations.

Opportunity to Improve Funder-Grantee Relationships

While ratings for the quality of interactions with Foundation staff are similar to those of the typical funder, and trend higher than those of the typical cohort funder, grantees experience the Foundation as low-touch in their engagement. Ratings and comments suggest opportunity to improve both communications and interactions with grantees.

- With regard to the quality of interactions, ratings are typical for staff responsiveness, approachability should a problem arise, openness to ideas from grantees, and overall foundation transparency.
- However, grantees report less frequent and proactive contact from their program officer than do grantees of the typical funder, though contact looks similar to the typical cohort funder.
- For both the clarity of the Foundation’s communications of its goals and strategy and consistency of HFPG’s communications, ratings are lower than typical, though similar to the typical cohort funder.
 - Perhaps relatedly, 31 percent of grantees report that they were not aware that the Foundation implemented a new strategic plan in 2016.

- Finally, improving the funder-grantee relationship is the most common suggestion, comprising nearly a quarter of grantees’ suggestions. Grantees most frequently request greater openness to their ideas, more frequent interactions with staff, and greater clarity about the Foundation’s goals and priorities.
 - Relatedly, while a minority theme in comments, grantee comments suggest mixed experiences with their Program Officer. While some grantees describe their Program Officer as experienced, responsive, thoughtful, and helpful, others experience their Program Officer as lacking understanding of their work, unresponsive, and inconsistent in communications.



“[HFPG] should get more feedback from grantees [and hold] periodic meetings with non-profits to understand the changing landscape we operate in.”



“We enjoy a productive and helpful relationship with our Grant Manager.... I have been surprised, however, that there doesn't appear to be regular communication or connection schedule during the life cycle of the grant.”

Helpful, though Time Consuming and High Pressure Selection Process

Grantees find the Foundation’s selection process helpful in strengthening their program/organization, though they experience these processes as time-consuming and high pressure.

- Ratings for the helpfulness of HFPG’s selection process are higher than both the typical and cohort funder for strengthening the program/organization supported by the grant.
- Nonetheless, HFPG grantees report spending a higher than typical amount of time (25 hours) on the Foundation’s selection processes; this is the highest rating in HFPG’s custom cohort.
- Grantees also rate HFPG staff to be more involved in the proposal development process than those of the typical funder, at the top of HFPG’s custom cohort. This involvement is associated with more positive perceptions on a number of survey measures, particularly the Foundation’s understanding of grantees local communities, organizational goals and strategies, and the context in which they work.
- Grantees report feeling high pressure to modify their priorities in order to receive funding. Ratings are in the top 25 percent of CEP’s dataset and higher than the typical cohort funder.
 - Importantly, grantees reporting higher pressure (rating a five, six or seven on the seven-point scale) rate lower on nearly every survey measure, including HFPG’s impact on their fields, communities, and organizational sustainability, the helpfulness of the selection process, and the strength of their relationships with HFPG.
- Separately, grantee feedback suggests opportunity to improve aspects of the Foundation’s evaluation and reporting processes. In a series of statements about reporting, HFPG grantees rate significantly less positively than typical, including the extent to which the process is straightforward, adaptable, and a helpful opportunity to reflect and learn.
- Nevertheless, certain touchpoints with the Foundation are associated with more positive perceptions of the evaluation and reporting processes.
 - Fifty-six percent of HFPG grantees, a typical proportion, report having had a substantive discussion with the Foundation about the submitted report. These grantees provide significantly more positive ratings on most measures, including perceptions of community and organizational impact, the funder-grantee relationship and the helpfulness of processes.
 - A typical proportion, though higher than that of the typical cohort funder, of grantees report engaging in an idea exchange about how their organization would assess the results of the grant-funded work. These grantees provide significantly more positive ratings on most survey measures.



“Foundation staff are quite helpful and knowledgeable in the planning process of submitting applications, both major and minor.”



“...The process is driven by a lot of conditional language, highlighting of inadequacy and confusion about the criteria for funding.... It instils a level of fear and trepidation that can be challenging.”

CEP Recommendations

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

- As strategies to maintain and ensure **ongoing strong community impact**:
 - Explore and codify practices undergirding strong perceptions of understanding and impact in the local community
 - Deepen & demonstrate understanding of beneficiaries and grantees’ contexts
- As strategies to maintain and build strong **impact on grantees’ organizations**:
 - Seek to deepen and demonstrate the Foundation’s understanding of grantee organizations, including the challenges their organizations face
 - Explore the extent to which HFPG aims to help grantees’ improve the sustainability of the grant-funded work in the future
 - When appropriate, consider providing more of the Foundation’s most aligned grantees with grant characteristics associated with greater impact, including greater provisions of general operating support and non-monetary assistance
 - In light of grantee interest, consider ways to facilitate collaboration and support convenings
- As strategies to **enhance the funder-grantee relationship**:
 - Ensure clear, consistent and frequent articulation of HFPG’s strategy - how it has changed from the past and implications for the future
 - Review communications to build greater consistency in communication
 - Work with staff to develop clear and concrete expectations for the quantity of interactions between staff and grantees
- Consider ways to improve aspects of the **Foundation’s selection and reporting process**, specifically:
 - Where appropriate, assess ways to minimize the pressure grantees feel to modify their proposals in order to receive funding from the Foundation
 - Consider opportunities to streamline the selection process
 - Seek to make the reporting process more straightforward, adaptable, and helpful

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