

WHERE WE ARE NOW:

RESULTS FROM
THE 2010 GRANTEE
PERCEPTION
SURVEY FROM



Our mission is to improve the health of the people in the Cincinnati region. We accomplish this mission in a number of ways. We provide funding, workshops and training, communication support, and management assistance. We also operate several community benefit programs. A key component of our work is grantmaking – giving funding to organizations and programs that provide services and promote policies that make our region a healthier place to live. Our relationship with our grantees is central to our work, because we rely on them to carry out our mission.

To understand more about how we can support our grantee partners, we hired the Center for Effective Philanthropy (CEP) to survey all of our active grantees as part of the 2010 Grantee Perception Survey. CEP's Grantee Perception Survey is the leading "customer satisfaction" survey in the field of philanthropy. Over the past six years CEP has surveyed 36,864 grantees from 251 philanthropic funders. This is the second time we have asked CEP to survey our grantees. You can read the summary of our previous Grantee Perception Survey Results at http://www.healthfoundation.org/hp_docs/You%20talked%20We're%20listening.pdf.

To help us see how we're

doing, CEP compiles our grantees' feedback and compares our ratings with other funders and with our previous results. It tells us when our performance is average compared with other funders and when our ratings are significantly above or below average (CEP highlights ratings that are in the top/bottom 25 percent of their dataset, as well as ratings that are in the top/bottom 10 percent). That helps us know where we're strong, where we're improving and where we have room to grow.

CEP conducted the 2010 survey in February and March 2010. CEP delivered the survey to 123 grantees who received funding from The Health Foundation between January and December

What is a "grantee"?

A grantee is an organization that receives a grant from The Health Foundation to carry out a specific program or activity. This doesn't necessarily include organizations that participate in our capacity building programs, use our conference facility or receive consultation from Foundation staff. Grantees don't represent all of the organizations we support, but they are a key constituency of our work.

2009. A total of 96 grantees responded, for a survey response rate of 78 percent. This is slightly higher than the median response rate for funders (68 percent).

[WHERE WE'RE STRONG]

For the second time, grantees gave The Health Foundation very high ratings on the Grantee Perception Survey. Grantees' overall satisfaction ratings put us in the top 25 percent of all funders in the CEP dataset.

Grantmaking processes

Grantmaking is a key component of our work, so it's critical that our processes are clear and helpful to our grantees. Our grantees rated the Health Foundation in the top 25 percent of all funders on several important aspects of our grantmaking process, including:

- The helpfulness of our selection processes in strengthening their work
- Our staff's level of involvement in the proposal process
- The helpfulness of reporting/evaluation processes to grantees.

“The Foundation's logic model process and goal setting are helpful in preparing a proposal. The grant officers are very helpful to me in thinking through what exactly I want to accomplish and how I plan to measure that accomplishment.”

Health Foundation grantees received:

- Strategic planning advice (38%)
- Assistance developing performance measures (49%)
- Communications assistance (30%)
- Use of Health Foundation facilities (44%)
- Staff/management training (30%)
- Information technology assistance (30%)
- Information about research or best practices (38%)

Grantee support

Compared with other funders, more of our grantees receive assistance above-and-beyond grant funding. More than 42 percent of our grantees received at least one type of non-monetary assistance.

We also provide assistance to grantees who are seeking funding from outside sources. Nearly 50 percent of our grantees reported that they received some type of assistance securing funding from other sources. This is a higher rate of assistance than 90 percent of the funders in CEP's dataset.

Our relationship with grantees

In 2004, the Health Foundation was one of the highest-rated foundations on quality of interactions with grantees. It's important that we maintain strong relationships with our grantees, and we were pleased to receive high ratings in the 2010 survey. We rate among the top 25 percent of funders in CEP's dataset on all four key measures of our relationship with grantees:

- Quality of Interactions
- Comfort approaching the funder if there is a problem
- Responsiveness
- Fairness

“We like working with the Foundation. They are so vested in our success that it removes fear of having setbacks or failures. That is a very positive environment to work in . . . Every staff person is open to discussion, helpful in problem solving and extremely supportive. Thank you!”

[WHERE WE'VE IMPROVED]

To see how the Health Foundation has changed over time, CEP compared our grantee's ratings with the results of our 2004 Grantee Perception Survey. Our scores show that we've improved in three important areas.

Impact

It's important that we make a difference in health and in the organizations we serve. In 2004, grantees gave us average ratings for our impact in the field and our impact on grantee organizations. After that survey, we made a number of changes based on our grantees' feedback. We added additional capacity building, evaluation and communication support to help grantees strengthen their work. We also increased our own capacity so that we could share more of what we're learning. Those changes made a difference. On the 2010 survey, we were rated in the top 25 percent of other funders on both impact on grantees' fields and impact on grantee organizations.

“The Foundation is a pioneer, trailblazer and innovator in the field. I believe they are setting the stage for other foundations to follow.”

Effect on Public Policy

When CEP conducted the 2004 survey, we were just getting our feet wet in health policy. Since then, we have taken a much more active approach to engaging in policy. Grantees see a difference, and rated our impact on public policy higher than in 2004. In fact, when it comes to impact on public policy, we were rated higher than 90 percent of all other funders and we were the highest-rated health funder in CEP's dataset.

The helpfulness of our reporting and evaluation processes

Evaluation has always been important to The Health Foundation, because it gives grantees the tools they need to tell their story. We want grantees to use evaluation to get better at what they do, but our 2004 grantees told us that the evaluation process was frustrating and confusing. Since then, we have taken steps to simplify our requirements and provide additional support to grantees. Over time, our program officers and evaluation staff have narrowed

“The Foundation has always been very helpful when we call with questions or concerns. Support regarding data collection and report writing has also been very positive.”

reporting requirements to focus on the “deal breakers” – the things that our grantees tell us can truly make or break a program. We also added additional support for grantees as they develop and carry out their evaluation plans, including workshops, templates, and structured consultations. As a result of those changes, our grantees rated us higher than 90 percent of other funders when it comes to the usefulness of our reporting and evaluation processes. That's a big improvement, and we're committed to getting even better. We will continue to provide consultation and support on data, evaluation and communications so that measurement can be a useful tool that improves our grantees' work and not a burdensome requirement.

[ROOM TO GROW]

We value the candid feedback we receive from the Grantee Perception Survey because it helps us identify areas for improvement. Based on our grantees' feedback, we have selected three areas for growth.

Consistency of communication

Our grantees give us high ratings for the usefulness and clarity of our formal communications. However, they also tell us that our informal communication needs some improvement. Our 2010 grantees told us that they sometimes hear conflicting messages from different staff members at the Foundation, particularly when they are working with more than one staff member on a project.

Since the last CEP survey, we have created more opportunities for grantees to receive assistance from our staff in communication, data and evaluation. From time to time, we also hire expert consultants to help grantees implement specific approaches or programs. We want our grantees to continue to benefit from the additional support and expertise that our staff and consultants can provide, but we also want to ensure that grantees receive consistent, accurate information from the Foundation about our expectations. To do this, we're making a conscious effort to clarify roles up front so that grantees know who to turn to for information. We also try to schedule meetings together,

and coordinate information through email so that we know that everyone's on the same page.

We hope these steps will help to increase the consistency of our messages. But we also know that miscommunication is bound to happen from time to time. So, we invite you to let your Program Officer know if you ever read or hear an inconsistent message from the Foundation. Your Program Officer is your primary contact for all information related to your grant, and will help you connect to the resources you need.

Project Streamline

Our 2004 grantees told us that our evaluation and reporting requirements could be overwhelming, and we took steps to adjust those requirements. Since then, we have simplified our annual reports, final reports and process evaluation plans. Since we have implemented these new practices, the amount of time our grantees spend on administration has dropped considerably (from 55 hours in 2004 to 40 hours in 2010). However, grantees still tell us that they sometimes feel confused and frustrated with

the process.

Reporting and evaluation are a balancing act. As funders, it's important that we conduct due diligence to ensure that we are making wise investments. At the same time, we don't want our needs to become a burden for the organizations we're trying to support. We are currently participating in Project Streamline (www.projectstreamline.org), a broader effort to simplify reporting requirements in the philanthropic community. We recently conducted a series of focus groups with grantees, and will begin to take steps to simplify our processes later this year.

In the meantime, if you have questions about our evaluation and reporting requirements, don't hesitate to contact your Program Officer. Our staff is always available to answer questions, provide consultation, or help connect you to resources that will make your project more successful.

Support for sustainability

A large proportion of our grant funding goes toward programs and services for poor and underserved people. This creates unique challenges for sustainability. Nearly half (47 percent) of our 2010 grantees

[ROOM TO GROW]

told us that they received assistance securing outside funding for their projects. This is a higher percentage than 90 percent of the other funders in CEP's dataset. However, when CEP compared that percentage to our own 2004 grantees, it found that fewer of our grantees in 2010 received assistance securing funding from other sources than did our grantees in 2004. We want our grantees' work to be successful, which is why we offer grantee groups, capacity building and technical assistance to help them strengthen their work and plan

for sustainability. Grantees tell us these activities are helpful, but sometimes they also need direct assistance as they seek funding from other sources.

We understand that sustainability is a challenge, particularly in the current economic climate. The recession has affected our budgets, too, so we have less funding to give. However, we have been looking for other ways to help grantees find potential sources of funding for their work. We actively participate in the Weathering the Economic Storm funder's collaborative,

which has awarded more than \$4.3 million in grants to local nonprofit agencies. Our staff is always willing to talk to grantees about potential sources of funding for their work and, in some situations, we may be able to assist with the development of grant proposals or business plans. In fact, during 2008-2009 we helped our grantees bring in \$36 million in federal and private grant funding. If you have questions or concerns about sustainability, please speak with your Program Officer.

[THANK YOU]

We're proud of our grantees and the work they do in the community. We would not be able to accomplish our mission without their dedication and commitment to excellence. We're very pleased to receive such ratings on this and the previous Grantee Perception Survey. It's an honor to receive this feedback from our partners in the community.

Positive feedback is always nice, but we're also grateful for the suggestions our grantees made about how we can improve our work. We're committed to learning and improving, and we promise that we will continue to look for ways that we can be a better funder, a more effective partner and a more useful resource in the Greater Cincinnati region. If you have ever have questions about our work or suggestions, don't hesitate to contact your Program Officer or any of our staff members.