

Key Findings and Recommendations from the Weingart Foundation 2018 Grantee and Applicant Perception Report

Prepared by the Center for Effective Philanthropy

In September and October of 2018, the Center for Effective Philanthropy conducted a survey of the Weingart Foundation's ("Weingart" or "the Foundation") grantees and declined applicants, achieving a 62 percent response rate for the grantee survey and 38 percent for the applicant survey. Only declined applicants who completed a full proposal were included in the survey. The memo below outlines the key findings and recommendations from the Foundation's Grantee and Applicant Perception Report (GPR/APR).

This memo accompanies the comprehensive survey results found in the Foundation's interactive online and downloadable report. Weingart's full report also contains more information about survey analysis and methodology.

Context and Overview

- ▶ CEP previously surveyed the grantees and declined applicants of Weingart Foundation in 2013. In the period since these surveys, the Foundation announced a full commitment to equity, shifted grantmaking priorities to include new groups, prioritized specific geographic areas of focus, rolled the small grants program into the unrestricted operating support program, and continued to prioritize issue areas that address emerging needs in the community.
- ▶ These changes are reflected in a smaller population of grantees compared to 2013, as well as more diversity in the race/ethnicity of respondents.
- ▶ Compared to 2013, grantee perceptions of Weingart Foundation have remained exceptionally positive on nearly all key measures in the report. Grantees in 2018 also provide significantly higher ratings in some areas, including for the Foundation's understanding of their local communities, impact on their organizations, and overall transparency.
- ▶ Grantee ratings place Weingart in the top 20 percent of CEP's dataset for perceptions of its impact, strength of relationships with grantees, and helpfulness of processes.
- ▶ Notably, the Foundation also receives significantly more positive ratings on a number of opportunities included in its 2013 report, with larger proportions of grantees in 2018 who receive intensive patterns of non-monetary assistance, who receive a site visit, and who report having discussions about how to assess the funded work.
- ▶ Ratings indicate more aligned experiences between grantees in the Expanding Opportunity Fund (Small Grant Program) and grantees in other funds, compared to the significant differences for those groups in 2013.
- ▶ Similar to grantee ratings, applicant perceptions in 2018 remain strong across the majority of the measures in the report.

Sustained Positive Perceptions of Impact on and Understanding of Grantees' Communities and Fields

- ▶ Grantees perceive the Foundation as having a strong positive impact on their local communities, providing ratings in the top 20 percent of CEP's dataset and towards the top of Weingart's custom cohort.
- ▶ Weingart grantees provide higher than typical ratings for the Foundation's understanding of their local communities and contexts, both of which are significantly higher than in 2013.
 - Grantee ratings also place Weingart in the top 15 percent of funders for its understanding of their beneficiaries' needs and the extent to which the Foundation's funding priorities reflect those needs.
- ▶ In their open-ended responses, grantees often champion the Foundation's presence in and impact on the community, sharing comments such as:
 - "It is my impression that the Foundation knows Los Angeles very well. It knows the issues facing the city, the communities within the city and the nonprofits that are serving those communities," and "I believe the Weingart Foundation has paved the way for funders to learn how to better support the nonprofit sector."
- ▶ Similarly, the Foundation receives higher than typical ratings for perceptions of its impact on and understanding of grantees' fields.
 - In particular, grantee ratings for the extent to which the Foundation has affected public policy have significantly improved since 2013 and are now higher than typical.
 - Grantees describe Weingart's "incredibly powerful" impact on philanthropy by bringing attention to equity and the importance of general operating support.



"The Foundation has an excellent reputation in our community and is considered a gold standard of giving."



"The support from the Foundation around equity in the [area] has reinvigorated a lot of our grassroots advocacy and facilitation of services. We have been able to expand our services to reach a larger community and amplify our services and grassroots advocacy and organizing."

Significantly More Positive Perceptions of Impact on Grantees' Organizations

- ▶ Building on already positive perceptions in 2013, grantees in 2018 provide significantly higher ratings for perceptions of Weingart's impact on their organizations, placing the Foundation in the top 10 percent of funders and near the top of its custom cohort.
 - Grantees also rate the Foundation higher than typical for the extent to which Weingart understands their organizations' goals and strategy, improves their ability to sustain the funded work, and is aware of their organizations' challenges.
- ▶ Relatedly, Weingart continues to provide a higher proportion of grantees with general operating support (87 percent) and multiyear grants (73 percent) compared to the typical funder.
 - Weingart grantees who report receiving multiyear grants rate significantly higher for the extent to which the Foundation has strengthened their capacity for policy advocacy, board governance and engagement, financial operations and management, funding development, staff and infrastructure, and systems change efforts.
 - In addition, when asked in a custom question about the helpfulness of Weingart's consideration of their organizational needs more holistically during the application process, grantees provide an average rating of 6.32 on a 1 to 7 scale.
- ▶ The proportion of Weingart grantees who report receiving intensive patterns of non-monetary support has also increased significantly since 2013. These grantees provide significantly higher ratings across the majority of measures in the report.
 - Still, a lower than typical proportion of Weingart grantees (7 percent) report receiving this type of intensive support beyond the grant, compared to 18 percent of grantees at the average funder in CEP's dataset and in Weingart's custom cohort.
 - In their suggestions for improvement, 23 grantees (the second-largest proportion) share comments requesting even more of this type of assistance. Grantees most commonly ask that the Foundation facilitate collaboration and convenings with other grantees, offer additional capacity building, and connect them to other sources of funding.



"Multi-year Unrestricted Operating Support has been a game changer for our organization. It put us on the right track to develop a strategic plan, fund development plan, compensation analysis, staff development plan, and facilities improvement plan. I wish all foundations structured their giving this way."



"We would be interested in the other types of assistance the Foundation may be able to provide that is not monetary. Connect us to other funders; host grants/development workshops; bring in speakers to talk about topics that non-profits need help with (e.g., training for our supervisors and managers to be better leaders, marketing, branding, public relations, social media, how to recruit board members, etc.)."

Strong Grantee Relationships with Opportunity for More Frequent Engagement

- ▶ CEP's research finds that funder-grantee relationships – defined by high quality interactions and clear, consistent communications – are one of the strongest drivers of how grantees perceive a funder's impact on their fields, communities, and organizations.
- ▶ Weingart is rated in the top 20 percent of CEP's dataset for the overall strength of its relationships with grantees, and higher than typical for responsiveness, fairness, and the clarity and consistency of its communications.
 - Additionally, grantees now rate significantly higher than in 2013, and in the top 10 percent of CEP's dataset, for Weingart's overall transparency.
 - In their open-ended comments, grantees describe Foundation staff as "collegial and respectful," "responsive and easy to work with," and "a blessing to the Los Angeles community."
- ▶ The proportion of Weingart grantees (72 percent) who report receiving a site visit during the course of their grant has increased significantly since 2013, and is now higher than typical.
 - Grantees who report receiving a site visit rate significantly higher for the Foundation's awareness of their organizations' challenges, openness to grantees' ideas, and the extent to which Weingart strengthened their capacity in a number of areas.
- ▶ Grantee responses suggest that consistent engagement with Weingart staff is an important factor in shaping grantees' perceptions of their relationships with the Foundation.
 - A higher than typical proportion of Weingart grantees reporting interacting with their program officer just yearly or less often – 44 percent compared to 18 percent at the average funder.
 - Weingart grantees who have contact with their program officer at least a few times a year rate significantly higher for several measures, including their overall relationships, comfort approaching Weingart if a problem arises, awareness of their challenges, and the Foundation's understanding of their organizations.
 - The largest proportion of grantee suggestions for the Foundation (27 grantees) mention more frequent communication or contact, specifically requesting "a regular check in time," "increased communication," and "a site visit to better understand our mission and our challenges."



"Weingart is my favorite foundation to work with. They act as a partner. They're smart. They listen. They seek to understand. They are looking for reasons to fund, rather than reasons not to fund."



"The only possible suggestion would be a little more engagement with our program officer. What engagement we had was always very positive and helpful, but it was limited."

Helpful Processes with Opportunities for More Discussion

- ▶ Similar to 2013, Weingart receives ratings that are in the top quarter of CEP’s dataset for the helpfulness of its selection process in strengthening grantees’ organizations or programs.
 - Grantees report experiencing a significantly higher level of Weingart staff involvement in the development of their proposals compared to 2013, and grantees who report the most substantial involvement from Weingart staff (rating a 5-7 on a 1-7 scale) also rate significantly higher for most other measures throughout the report.
 - When asked about the potential use of GuideStar in or as Weingart’s application process in a custom question, both grantees and applicants indicate a preference for the current process. While some see potential for GuideStar to replace a specific part of the application, less than a third of grantees and applicants believe GuideStar should replace the full application.
- ▶ After submission of their proposal, a higher than typical proportion of Weingart grantees report waiting four months or longer for a clear commitment of funding – 66 percent compared to 38 percent at the average foundation.
 - Grantees who report waiting four months or more rate significantly lower for the extent to which they feel comfortable approaching Weingart if a problem arises and for how fairly they believe they were treated.
- ▶ Perceptions of Weingart’s reporting process are also positive, with grantees providing ratings in the top 15 percent of CEP’s dataset for the extent to which the process was straightforward, relevant, adaptable, and a helpful opportunity for reflection and learning.
- ▶ Compared to 2013, larger proportions of Weingart grantees report exchanging ideas with the Foundation about how to assess the funded work (66 percent) and having a substantive discussion with the Foundation about the report(s) they submitted (55 percent).
 - Grantees who report exchanging ideas with Weingart about how to assess the funded work or discussing their submitted reports rate significantly higher for many report measures.
- ▶ While the median number of grant dollars awarded per process hour required (i.e., dollar return) for Weingart grantees overall is now higher than typical, Expanding Opportunity Fund (Small Grant Program) grantees report receiving a smaller than typical dollar return.
 - Although Small Grant Program grantees report spending fewer median hours on processes, they also report receiving smaller, shorter grants, and have smaller operating budgets compared to other Weingart grantees.



“Foundation staff were extremely clear on funding.... The Foundation’s communications with us regarding effective frameworks for this type of funding were very helpful and informed a stronger proposal submission.”

Overall Positive Perceptions from Declined Applicants

- ▶ Compared to funded grantees, Weingart declined applicants tend to be much smaller organizations, with a median budget of \$0.8M compared to \$3.0M, and request smaller grants, a median of \$25K compared to \$125K.
- ▶ As in 2013, the Foundation’s declined applicants have overall positive perceptions, providing higher than typical ratings for most measures in the report, including:
 - Perceptions of Weingart’s impact on and understanding of applicants’ fields, understanding of their organizations, responsiveness, accessibility, and overall transparency.
- ▶ Applicants continue to rate the Foundation higher than typical for the clarity of its communications, but now rate significantly lower than in 2013 (and lower than typical) for the consistency of information provided by different resources.
 - When asked a custom question about applicants’ experience related to the Foundation’s equity commitment and funding priorities, they more strongly agree that the Foundation clearly communicated what aspects of its funding priorities were a change from the past, and less strongly agree that Weingart’s funding priorities are clearer now than previously.
- ▶ Weingart receives higher than typical ratings for the helpfulness of the selection process in strengthening applicants’ organizations, and applicants report spending significantly less time on the proposal process compared to 2013.
- ▶ Applicants rate Weingart higher than typical for the honesty of the reasons it gave about why their proposal was not funded, and a higher than typical proportion also request feedback.
 - Notably, 100 percent of applicants who requested feedback received it.
 - As a potential opportunity for the Foundation to consider, applicants rate lower than typical for the helpfulness of Weingart’s feedback in strengthening future proposals to the Foundation.
- ▶ Concerning future proposals, 100 percent of declined applicants indicate they would consider applying for funding again.



“I was impressed at the quality of contact with the program officer. She asked great questions, was transparent about the Foundation’s goals, and it never felt inappropriate to ask direct questions. She was really wonderful and clear, as well as generous with her time.”



“Provide better guidance to returning organizations previously funded by the Foundation.”

CEP Recommendations

Based on its grantee and declined applicant feedback, CEP recommends that the Weingart Foundation consider the following in order to build on its strengths and address potential opportunities:

- ▶ Celebrate the consistently strong ratings since 2013 for Weingart's impact on and understanding of grantees' fields, communities, and organizations, and build on these strengths as the Foundation continues its focus on equity.
- ▶ Continue to build staff capacity in order to provide grantees with additional non-monetary support, including collaboration, convening, and other types of capacity building.
- ▶ Discuss potential barriers to more frequent interactions with grantees, and create opportunities for regular engagement with grantees more than once per year.
- ▶ Set clear expectations about the application process timeline with grantees and applicants, and streamline the process where possible based on grant/organization size.
- ▶ Based on applicants' fit with Weingart's commitment to equity and grantmaking priorities, consider providing either more detailed feedback that would help strengthen their proposals in the future, or more direct feedback about their likelihood to receive funding before a full application is submitted.

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