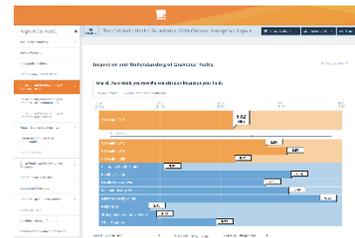


Key Findings and Recommendations from The Colorado Health Foundation 2019 Grantee Perception Report

Prepared by The Center For Effective Philanthropy

In October and November of 2019, The Center for Effective Philanthropy conducted a survey of The Colorado Health Foundation's ("TCHF" or "the Foundation") grantees. The memo below outlines CEP's summary of key strengths, opportunities, and recommendations. TCHF's grantee perceptions should be interpreted in light of the Foundation's goals, strategies, and significant recent changes.

This memo accompanies the comprehensive survey results from 426 respondents (a 62 percent response rate) found in TCHF's interactive online report at <https://cep.surveymresults.org> and in the downloadable online materials.



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

- ▶ CEP previously surveyed grantees of The Colorado Health Foundation in 2015. The intervening period has been one of substantial change, including a redesign of organizational strategies, implementation of an equity focus, restructuring of the program officer role, and extensive DEI work with staff.
- ▶ With this significant level of change in mind, TCHF grantee ratings have generally remained consistent or have improved compared to the Foundation's 2015 survey. In particular, grantees in 2019 rate significantly higher compared to 2015 for measures related to TCHF's:
 - Understanding of contextual factors affecting grantees' work
 - Awareness of challenges facing grantees' organizations
 - Overall transparency
 - Openness to grantees' ideas about its goals and strategy
 - The helpfulness of its selection process in strengthening grantees' organizations and programs
- ▶ In addition, ratings from more recent grantees trend higher for nearly all measures in the survey. Respondents whose grants started in 2019 provide the highest ratings compared to other grant years, indicating that the Foundation is moving in the right direction with the most recent changes in strategy and structure.
- ▶ Grantee ratings vary across many other groups at the Foundation, including program area, congressional district, and geographic type. These variations – which can be explored more fully in the interactive online report – can help drive team-level discussions and may help inform the Foundation's targeted responses across groups.

Continued Positive Impact on Grantees' Fields and Communities

- ▶ Similar to past survey results, grantees recognize the Foundation's positive impact on their fields, placing TCHF above the median in CEP's dataset and near the typical funder in its custom cohort of peer funders.
 - Ratings also remain similar to the median funder for the extent to which TCHF has advanced the state of knowledge in their fields and affected public policy.
 - One grantee, for example, describes the Foundation as a "leader and influencer, not only...for their philanthropic support...but for their unparalleled commitment to creating health equity for marginalized communities."
- ▶ In addition, TCHF is rated higher than 60 percent of funders for its impact on grantees' local communities.
- ▶ The Foundation's influence in the community comes through clearly in written responses, with grantees sharing comments such as:
 - "The Foundation has had an enormous impact...throughout the State of Colorado. ...we have been able to impact thousands of kids, especially those living in rural communities by allowing them access to play infrastructure...thereby increasing health and well-being."
 - "The Foundation has supported...diverse community programming to underserved populations. The support from the Foundation has legitimized our arts programming as addressing health and community resiliency."



"The Colorado Health Foundation is in a unique position to move public policy around health and community. They have certainly been vocal about best practices in community engagement and the importance of a focus on involving members of community in solving their own problems."

Strong Organizational Impact and Opportunity to Further Support Grantees' Work

- ▶ TCHF grantees provide ratings that are near the top quarter of CEP's dataset for the Foundation's impact on their organizations.
- ▶ Grantee ratings and comments indicate opportunities to further build on TCHF's organizational impact through changes in the Foundation's grantmaking characteristics.
 - TCHF's average length of grants awarded is similar to the typical funder, while the Foundation provides a smaller than typical proportion of unrestricted grants (i.e., general operating, core support).
 - The second-largest proportion of grantee suggestions for TCHF relate to grantmaking characteristics – primarily requesting more unrestricted grants (N=15) or longer grants (N=13). As one grantee explains, "the issues the Foundation is interested in...which...necessitate the long view and a long term commitment.... Expecting meaningful results in just a few years is not realistic or helpful."

- ▶ In addition, grantmaking characteristics surfaced as an important topic in relation to another area of TCHF’s work – diversity, equity, and inclusion.
 - In their open-ended responses to a custom question about how the Foundation could best support their DEI efforts, grantees shared how flexible and multiyear funding would allow them to “do the deep dive into understanding the barriers to service in order to develop strategies for becoming more inclusive,” “contract with local experts in the area of diversity, equity, and inclusion to provide professional development opportunities for our staff,” and “offer more competitive salary and benefits and provide the trainings and resources needed to recruit and retain a diverse workforce.”



“The Foundation has allowed us to grow our programs and impact, leverage their funding for additional support, and build out our team and capacity.”



“I think it would be interesting to bring together grantees in the same program areas to exchange our work and best practices. Help us learn from each other.”

Opportunities for More Frequent, Reciprocal Interactions and Stronger Understanding

- ▶ Strong funder-grantee relationships – defined by high quality interactions and clear, consistent communications – are a key predictor of grantees’ perceptions of impact.
- ▶ TCHF grantees rate lower than typical, and similar compared to 2015, for the overall quality of their relationships with the Foundation.
 - In comments, grantees describe examples of positive relationships with Foundation staff. Several grantees describe TCHF staff as “extremely helpful,” “good listeners and direct communicators”, and operating from “a culture of kindness, thoughtfulness, and understanding.”
 - TCHF grantees also rate significantly higher than in 2015, and now similar to grantees at the typical funder, for the Foundation’s overall transparency.
 - Still, when asked for suggestions about how the Foundation can improve, the largest proportion of grantees mention relationships. Of the 44 grantees who shared suggestions related to improving relationships, the majority of grantees encouraged building stronger relationships through more engagement with program staff (N=24), quicker staff responsiveness (N=7), and a larger presence in their local communities (N=4).
- ▶ Certain patterns are associated with significantly more positive grantee perceptions of impact and relationships.
 - Grantees report interacting with their program officer less frequently than typical, and the roughly two-thirds of grantees who report interacting with their program officer at least a few times a year provide significantly higher ratings on all key measures in the report.

- Nearly half of grantees – a higher than typical proportion – report being the party to most frequently initiate contact with their program officer. Grantees who did not have to initiate contact or who indicate reciprocal initiation of contact rate the Foundation significantly higher across all measures in the survey.
- As in past years, a higher than typical proportion of grantees report a contact change at TCHF in the last six months. Those who did not experience a contact change provide significantly higher ratings on all measures in the report.
- ▶ Additionally, CEP’s research finds that one of the strongest predictors of funder-grantee relationships is an understanding of grantees and their contexts.
 - Grantees rate less positively than typical, and at the bottom of TCHF’s custom cohort, for a summary measure of TCHF’s overall understanding. This summary includes lower than typical ratings for the Foundation’s understanding of grantees’ organizations, context, and beneficiaries, among other measures.
- ▶ These perceptions are echoed in TCHF’s custom questions about grantees’ perceptions of the Foundation and their engagement with program staff.
 - Grantees provide the lowest average ratings for their agreement that the Foundation engages with those who have lived experience around the issues it is working on, that program staff talk to them about equity and how it applies to their work, and that program staff are present and available in their community.
- ▶ Respondents whose grants started in 2019 provide higher average ratings for the strength of their relationships compared to other grantees, placing TCHF near the median funder. Grantees from 2019 also provide higher average ratings for most custom questions related to perceptions of the Foundation and program staff.



“We would suggest that the Foundation continue building the relationships between program officers and grantees throughout the year. The Foundation has made a strong commitment to deepening these relationships, and...allow... grantees and program officers to share what is working and what could work better.”



“Do more to recognize and seek out the expertise of grantees to inform their work. We have felt previously that occasionally the Foundation overlooks the experience and expertise of grantees who are also community leaders and have valuable knowledge to share about their areas of influence.”

Helpful Processes with Opportunity for More Engagement

- ▶ Given the larger than typical size of the Foundation’s grants, TCHF grantees continue to receive a higher than typical monetary return for every hour they spend on Foundation processes.
 - The 38 hours spent by the average TCHF grantee on Foundation-required processes is similar to that at its peer funders and at the typical funder in CEP’s dataset.

- ▶ The application process is now rated significantly higher than in 2015 for the extent to which it was helpful in strengthening grantees’ organizations or programs.
- ▶ Still, in the development of their proposal, TCHF grantees continue to report experiencing more pressure to modify their organization’s priorities in order to receive funding than grantees of most other funders in CEP’s dataset.
 - CEP’s research finds that pressure experienced by grantees is one of the key predictors of the strength of funder-grantee relationships: higher pressure is associated with lower relationship ratings. TCHF grantees who report experiencing the most pressure (rating a three or higher on a 7-point scale) provide significantly lower ratings for nearly all measures in the report.
- ▶ TCHF is rated similar to the typical funder for the extent to which its reporting process is straightforward, adaptable, relevant, aligned appropriately to the timing of grantees’ work, and a helpful opportunity to reflect and learn.
 - During the reporting process, a lower than typical proportion of grantees – 42 percent – indicate having had a substantive discussion about submitted reports with Foundation staff. These grantees provided significantly higher ratings for nearly all key measures in the report, particularly regarding relationships and overall understanding.
- ▶ Compared to 2015, a significantly smaller proportion of grantees report having exchanged ideas with the Foundation about how to assess the results of the funded work. Like those who discussed submitted reports, grantees who discussed plans for assessment rated the Foundation significantly higher on nearly all key measures in the report.

Recommendations

- ▶ Recognizing the Foundation’s sustained impact on grantees’ fields and communities, consider how TCHF’s values and behaviors are documented internally for use in guiding development of future efforts.
- ▶ Given grantees’ suggestions and the Foundation’s focus on furthering diversity, equity, and inclusion efforts, consider what changes to TCHF’s grantmaking patterns may help support DEI in its own work and in the work of its grantees.
- ▶ While carefully considering staff capacity, seek opportunities to strengthen relationships with grantees by:
 - Prioritizing more frequent and reciprocal patterns of interactions with grantees, and setting expectations about the level of engagement during their grant.
 - Creating opportunities during site visits that allow staff to learn more about and/or demonstrate understanding of grantees’ local contexts and beneficiaries’ needs.
 - Building internal processes to ensure smooth transitions for grantees during changes in program officer, concentrating on early communication.
 - Assessing the clarity and consistency of TCHF’s communications with grantees as the Foundation’s strategies solidify.

- ▶ Explore opportunities to discuss assessment and submitted reports with a larger proportion of grantees, given the feedback that underscores their value.
- ▶ Determine where the current variation in grantee experience across different groups seems logical and appropriate, and where greater consistency of experience is desired – particularly in terms of grantees’ relationships with the Foundation.

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