

Key Findings and Recommendations from The Greater Rochester Health Foundation 2023 Grantee Perception Report

Prepared by the Center for Effective Philanthropy

In May and June of 2023, the Center for Effective Philanthropy (CEP) surveyed The Greater Rochester Health Foundation’s (“GRHF” or “the Foundation”) grantees. The memo below outlines the key findings and recommendations from Greater Rochester Health Foundation’s Grantee Perception Report (GPR). GRHF’s grantee perceptions should be interpreted in light of the Foundation’s goals, strategy, and context.

This memo accompanies the comprehensive survey results from 64 grantees (a 65 percent response rate) found in Greater Rochester Health Foundation’s interactive online report at <https://cep.surveymethods.org> and in the downloadable online materials, including respondents’ written comments. The online report also contains more information about the survey methodology and analyses.

Overview

- ▶ In comparison both to funders in CEP’s overall dataset and a custom cohort of peer funders, Greater Rochester Health Foundation (GRHF) grantees rate the Foundation higher than typical on most thematic areas of the report – and often statistically more positively than in 2020. As one grantee comments, “The quality of the Foundation processes, interactions and communication is excellent. They truly care. They do not want to just provide you with the funding they want you to exceed.”
- ▶ GRHF’s efforts in fields and communities – for example perceptions of its impact and understanding of grantees’ local communities, and its understanding of the people and communities that grantees serve – is perceived to be a major strength of the Foundation.
- ▶ Compared to the typical funder, GRHF is viewed by its grantees as having a stronger impact on their organizations, and many grantees underscore how valuable they find the Foundation’s efforts to provide assistance beyond the grant.
- ▶ GRHF receives very positive ratings for many aspects related to its relationships with grantees.
- ▶ The characteristics of GRHF’s grants have changed greatly since the previous survey in 2020, with the Foundation now providing larger grants, more multi-year funding, and more unrestricted funding to grantees.

Important Context: Changes in Grant and Grantee Characteristics since 2020

While the size, duration, and type of grants doesn't alone define grantees' experiences, they convey trust and they can be important contributors, particularly to impact on grantees' organizations.

- ▶ The characteristics of GRHF's grants have significantly changed since the 2020 survey.
 - Median grant size: \$87,000 (fairly typical compared to others) vs. \$25,000 in 2020
 - Proportion of multi-year grants: 63 percent (fairly typical) vs. 46 percent in 2020
 - Proportion of unrestricted grants: 29 percent (fairly typical) vs. 5 percent in 2020. Of note, 56 percent of Racial Health Equity grantees receive unrestricted funding
 - Proportion of multi-year unrestricted grants: 19 percent (higher than typical) compared to 1 percent in 2020.
- ▶ GRHF is now also providing more grants to first-time recipients and to organizations with smaller organizational budgets, and GRHF's smaller grantees have particularly positive perceptions of its impact on their fields and their organizations.
- ▶ Grantees' comments show appreciation the characteristics of the Foundation's grants and the choices it makes about whom to fund. Echoing others, several grantees write:
 - "The grants made available to the lower SES areas have been amazing, one of a kind and deeply appreciated... Focusing financially on rural areas is not something we see very often, but the benefit is so great."
 - "Grants in our line of work really don't exist, so the thinking behind it was really one of a kind and much needed."
- ▶ In their suggestions for improvement, grantees also emphasize this theme. About a third of grantees' suggestions call on GRHF to provide even larger, longer, or more unrestricted grants.



"By investing in our organization, you have not only provided us with the resources needed to make a significant impact but also empowered us to inspire and mobilize others within our field. Your foundation's support has served as a catalyst for innovation, encouraging us to think beyond traditional boundaries and explore new avenues for creating lasting change."

Perceptions of Impact on Grantees' Communities and Fields

Grantees' ratings of GRHF are higher than typical when assessing the Foundation's impact on their local communities.

- ▶ In 2023, grantees rate the Foundation's impact much higher than typical, a rating at the 86th percentile in CEP's dataset and trending up from 2020. Ratings for GRHF's understanding of grantees' local communities were even higher, at the 94th percentile of CEP's overall data set and significantly improved from 2020.
 - Grantees serving Monroe have significantly more positive perceptions on these themes than those that do not serve Monroe.
- ▶ Grantees' ratings of GRHF's impact on and understanding of their fields are typical compared to other funders. Field impact ratings are unchanged since the last survey in 2020, though ratings of the Foundation's understanding of grantees' fields are trending up.

- Grantees within the Foundation’s Racial Health Equity program rated the Foundation much higher on questions related to grantees fields.



“We would be remiss if we did not acknowledge the profound influence the foundation has had on our field, community, and organization beyond the grant we received. [Its] visionary approach and commitment to driving positive change have transformed the landscape in which we operate, leaving an indelible mark on our collective efforts.”

Organizational Impact

GRHF receives some of its comparatively highest ratings on questions related to the impact it has on grantees’ organizations.

- ▶ Ratings of the Foundation’s impact on grantees’ organization are in the 94th percentile of CEP’s dataset and ratings of GRHF’s understanding of grantees goals and strategies as well as understanding of the challenges they face are in the 89th and 93rd percentiles respectively. All have significantly improved since 2020 when the Foundation’s ratings were fairly typical.
 - NHSI & Healthy Equitable Futures program grantees provide meaningfully lower ratings on these questions than grantees from other programs.
- ▶ A majority of grantees, 75 percent, also report receiving some form of non-monetary assistance from the Foundation, with most grantees receiving program related assistance and field building assistance from the Foundation. As one grantee writes, “Our experience applying for and discussing the design of this program with the program officer at GRHF was instrumental in helping us design a program responsive to community needs, which in my view strengthened our other applications for funding from government sources.”
 - Ratings of the quality of this assistance are also comparatively high, with grantees particularly positive about the extent to which this support met an important organizational need, was worth the time they spent, and that GRHF was open to feedback about the non-monetary support provided.
- ▶ Another association with these positive ratings of organizational impact is GRHF’s provision of site visits. Sixty-nine percent of GRHF grantees report receiving a site visit from the Foundation (a higher than typical proportion), and grantees that receive site visits provide higher ratings for GRHF’s impact on and understanding of their organizations.



“The quality of the Foundation processes, interactions and communication is excellent. They truly care. They do not want to just provide you with the funding they want you to exceed. We are where we are today because of the foundation. I am and always will be grateful for not just the funding but the coaching and direction they provide.”

Strong Interactions with Grantees with Opportunities for Further Engagement

For several measures related to relationship building with grantees, GRHF receives ratings that are exceptional. Grantees regularly described interactions with the Foundation as “friendly,” “helpful,” “positive,” and “exceptional.”

- ▶ For comfort approaching the foundation when a problem arises in their efforts, grantees’ ratings of the Foundation are higher than 93 percent of funders in CEP’s overall dataset. These exceptional ratings have been maintained since the previous survey in 2020.
- ▶ GRHF receives similarly positive ratings for exhibiting compassion for those affected by the grantees’ work and for its openness to ideas about its strategy. Ratings on both of these measures have significantly improved since 2020 and are in the top 10 percent of CEP’s dataset.
- ▶ Ratings on other measures of interactions are more typical and less changed, including for questions related to responsiveness and trust.
- ▶ Grantee contact with GRHF staff has also increased since 2020. More than 80 percent of grantees report engaging with their program officer at least once every few months.
 - Nevertheless, grantees ask for even more engagement. In their suggestions for improvement, about a third of grantees ask the Foundation to provide a variety of additional interactions, including more and more regular interaction generally, more advice, and clearer expectations.
- ▶ The Foundation’s communications with grantees is a second opportunity related to relationships with grantees. While grantees continue to provide higher than typical ratings for the clarity of communication of the Foundation’s goals and strategies, their ratings are lower than typical for the consistency of those communications *across people and resources*. This is one of the only areas in the survey where grantees’ ratings are lower than typical – and no program is rated higher than typical.
 - A few grantees suggest improvements in communication of the Foundation’s decision-making criteria, about its future direction, and the big picture of its collective programs.
- ▶ NHSI and Healthy Equitable Futures rate the foundation lower on several questions related to the quality of relationships.



“The foundation creates hope, hope for our organizations, and hope for our community. They make you feel like you have an ally with the ability to help change some things, and not only can they, but they will. I do my work boldly and advocate for my kids loudly because, collectively, the staff at the foundation have assured me that my work has value and that my impact is real... This provides opportunities for collaborations, relationship building, and moral support.”

Overall Helpful Grant Processes

- ▶ Overall grantees reported that the application submission process was a helpful opportunity to strengthen the efforts funded by the grant: Grantees’ ratings of the Foundation are in the top ten percent of CEP’s comparative dataset. Similarly, grantees find the Foundation’s reporting process significantly more helpful to their reflection and learning than in the past, providing ratings near the very top CEP’s dataset.
 - Eighty-one percent of respondents report that they exchanged ideas with the foundation about how they would assess the results of the work funded by this grant.
- ▶ GRHF’s processes are slightly more streamlined than in 2020. The typical grantee in 2023 reports spending about 23 hours on application and reporting requirements – down from 30 hours in

2020. Grantees provide ratings that are just higher than typical for the extent to which they found the submission process to be an appropriate level of effort given the amount of funding received.



“We found the quality of the GRHF staff’s support and guidance to be very helpful. They were excellent partners to work with. Their processes, interactions and communications were outstanding.”

CEP Recommendations

Based on this grantee feedback, CEP recommends that The Greater Rochester Health Foundation consider the following in order to build on its strengths and address potential opportunities.

- ▶ Celebrate and maintain aspects of the Foundation’s approach that have led to such strong perceptions of its impact on grantees’ fields, local communities, and organizations. In particular, reflect on intentional changes in GRHF’s approach since 2020, and ensure those changes are clearly understood and embedded in GRHF’s future work.
- ▶ Continue providing valuable non-monetary support and consider further increasing the provision of the kind of multi-year, unrestricted grants both of which grantees find transformational for them and their fields.
- ▶ Discuss and codify program staff’s strong approach to relationship building and identify where potential increased engagement could be leveraged to enhance grantees’ perceptions of the Foundation’s responsiveness.
- ▶ Examine the various channels through which the Foundation communicates its approach to grantees and identify where they may be inconsistent.
- ▶ Examine differences in perceptions across program areas and discuss where those differences reflect intentional decisions or opportunities to create greater consistency of positive experience across all grantees.

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