

Grantee Voices

Strengthening Collaboration by Listening to Our Grant Recipients

NOVEMBER 2018



PREPARED FOR

The Counselling
Foundation of Canada

PREPARED BY

grantbook^o

Acknowledgements

We are grateful for the 115 individuals who took the time to give thoughtful responses to our survey. Thank you to Caitlin Blacklaws, Betul Keles, Veanna Octive, Tierney Smith, Haifa Staiti, for their support in conceptualizing and coordinating this project.

Project Sponsors

Jehad Aliweiwi - Laidlaw Foundation

Sandra Cruickshanks - The Counselling Foundation of Canada

Marcel Lauzière - Lawson Foundation

Bruce Lawson - The Counselling Foundation of Canada

Ben Liadsky - The Counselling Foundation of Canada

About Grantbook

Grantbook is a boutique consultancy that works exclusively with grantmakers and nonprofit foundations, enabling them to leverage digital technology alongside grantmaking best practices to activate and demonstrate their impact.

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Executive Summary

This joint initiative of The Counselling Foundation of Canada, Lawson Foundation, and Laidlaw Foundation aims to demonstrate *transparency*, foster *learning*, and strengthen *collaboration* by collecting and analysing feedback from grant recipients. Grant recipients are indispensable partners in achieving the foundation's mission. Open dialogue and honest feedback are central to

effective partnership, and while we strive to be responsive and open, we also know that it isn't always easy to tell a funder that there is room for improvement. Grantbook was engaged to collect and synthesize confidential feedback about grant recipients' experiences of working with the foundation.

Overall Results in Focus Areas (Counselling Foundation)

Relationship

Respondents had positive views of their relationship with the foundation in the areas of interaction, communication and sharing problems that arise. The foundation is seen as extremely flexible and accommodating. Respondents were less satisfied with the foundation's understanding of their organization's strategy and goals. More regular follow-ups and interactions with program beneficiaries were suggestions for improvement.

The long-term impacts of a relationship with the foundation has included creating capacity to develop a tool that was shared with the wider community, thus establishing the grant recipient organization's presence in the sector.

Organizational capacity and non-financial support

The foundation is not seen as understanding the internal challenges of grant recipient organizations very well. However, the support given is seen as useful, especially connections to partners (such as collaborators or potential funders), attending and presenting at Cannexus (an annual National Career Development Conference supported by the Foundation), and monitoring and evaluation support.

Impact on the field

The foundation is seen as understanding the work of the organizations they fund, and the complex realities those organizations work in.

Results Summary

Praise From Grantees

The foundation is seen as supportive of the career development sector in Canada.

*An incredibly **helpful, empathetic, enthusiastic and knowledgeable** funder.*

Appreciation and respect for Indigenous approaches

Response Rate:

78%

31/40



*Staff have been **extremely helpful and supportive** when challenges have arisen. We have always found positive ways to move forward **even when the unexpected has arisen** over the course of our project.*

Areas for Improvement

On-going funding is a challenge that is named by many respondents, and support to ensure funding for the future would help respondents do their work more effectively.

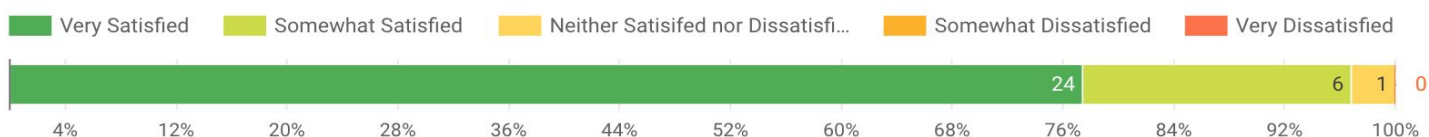
***Fund overhead not just programs.**
Help improve organizational capacity.*

More youth engagement.

Response Summaries

Relationship

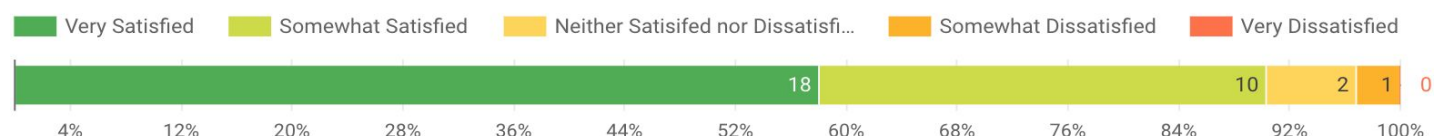
How satisfied are you with the Foundation's communication and interaction with you and your organization? **Average score: 4.70/5**



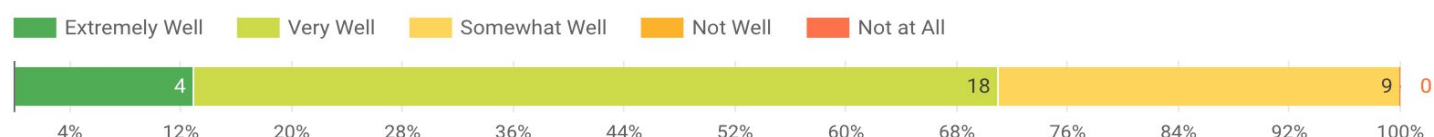
Response Summaries

Relationship, cont'd

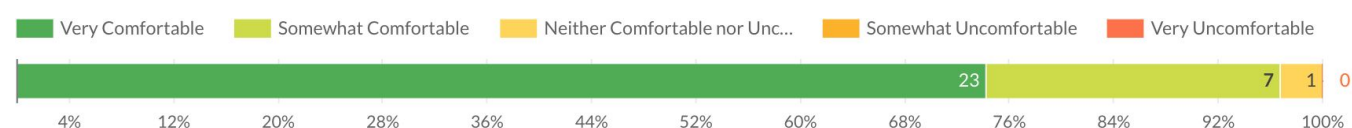
How satisfied are you with your understanding of the foundation's strategy and goals?
Average score: 4.85/5



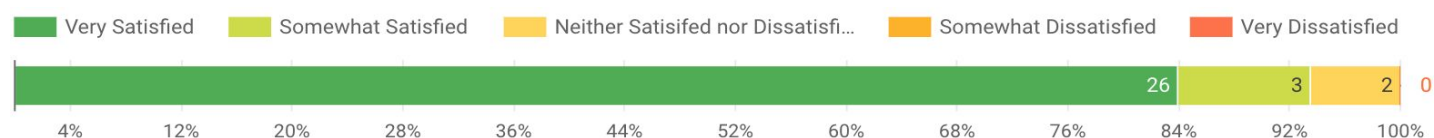
How well does the Foundation understand your organization's strategy and goals?
Average score: 4.08/5



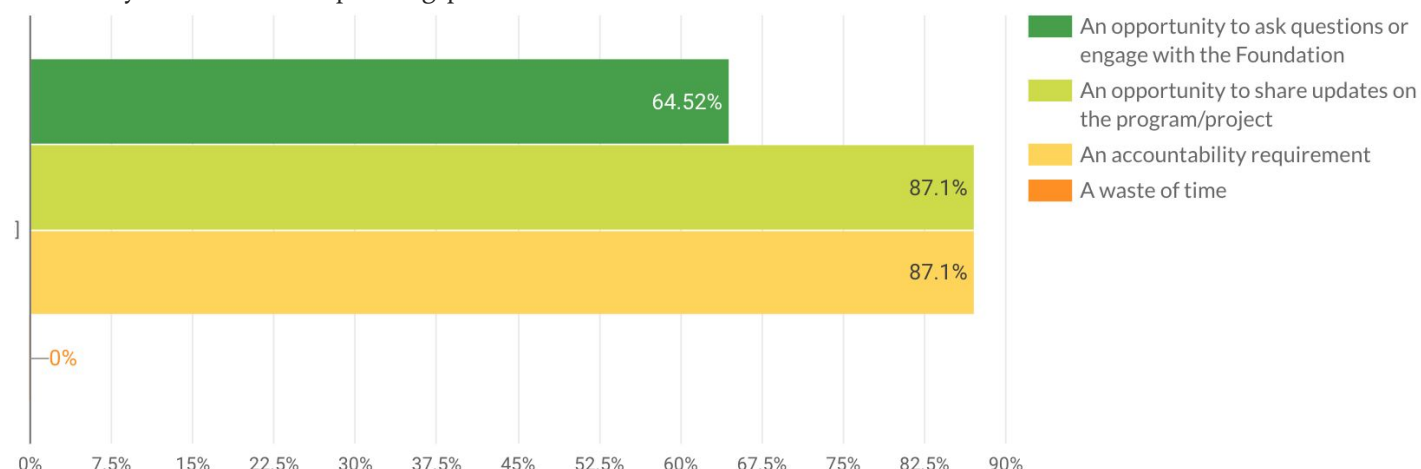
How comfortable are you sharing with us whether a problem has arisen or whether something has not worked as planned? **Average score: 4.71/5**



How satisfied are you with the foundation's flexibility in terms of accommodating change (e.g., changing deadlines, budgets, or deliverables)? **Average score: 4.85/5**



How do you view our reporting process?

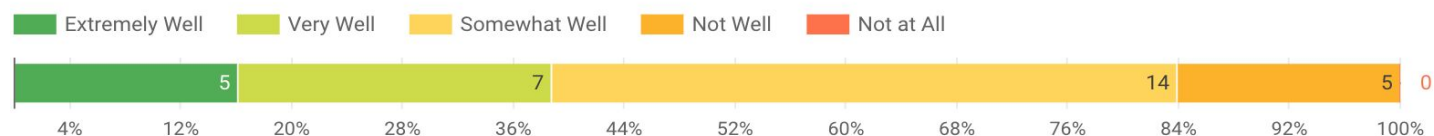


Response Summaries

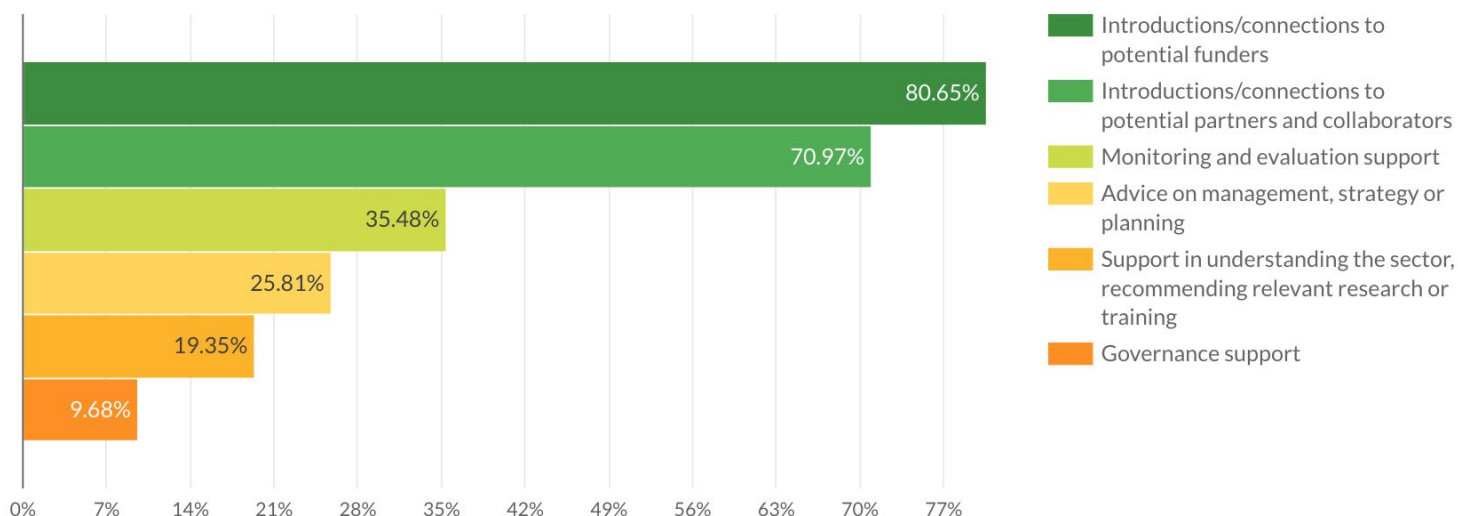
Organizational capacity and non-financial support

How well does the Foundation understand the internal challenges that your organization is facing?

Average score: 3.60/5



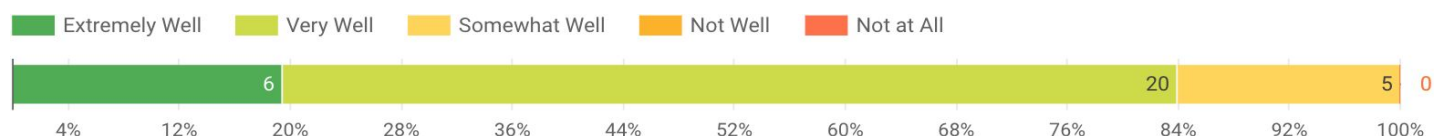
What kind of non-financial support would be most helpful to you?



Impact on the field

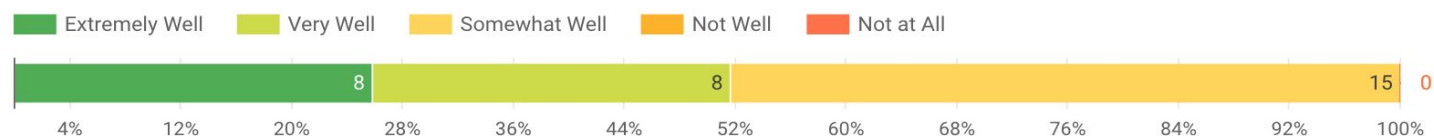
How well does the Foundation understand the work that your organization does?

Average score: 4.23/5



How well does the Foundation understand the complex realities and context in which you work?

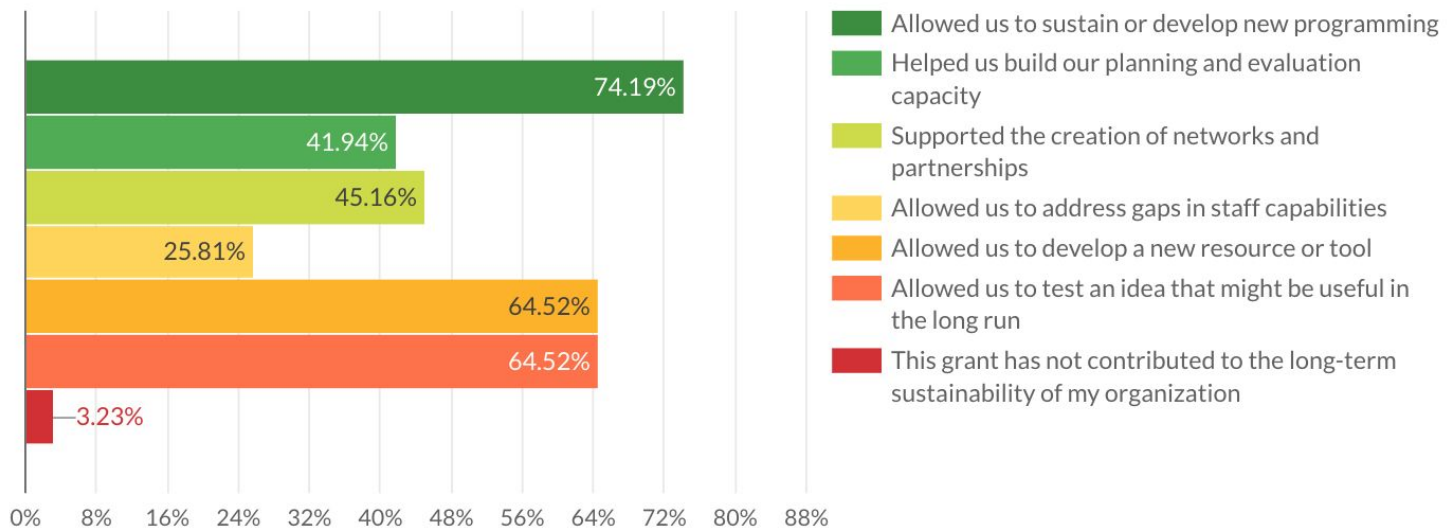
Average score: 3.99/5



Response Summaries

Impact on the field, cont'd

How has this grant helped the long-term sustainability of your organization?



Introduction

Objective

This joint initiative of The Counselling Foundation of Canada, Lawson Foundation, and Laidlaw Foundation aims to demonstrate **transparency**, foster **learning**, and strengthen **collaboration** by collecting and analysing feedback from grant recipients.

Guiding Principles

Grant recipients are indispensable partners in achieving the foundation's mission. Open dialogue and honest feedback are central to effective partnership, and while we strive to be responsive and open, we also know that it isn't always easy to tell a funder that there is room for improvement.

GrantBook was engaged to collect and synthesize confidential feedback about grant recipients' experiences of working with the foundation. Through this initiative, we hope to achieve:



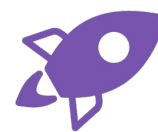
Enhanced Collaboration

Fostering alignment, trust,
and engagement with our
stakeholders



Transparency & Learning

Transparency and
accountability to the
community and wider sector



Action

Usable data and insights
so the Foundation can
champion internal change

A Collaborative Approach: Three Peer Foundations



LAWSON
FOUNDATION

LALDLAW
FOUNDATION

The Counselling Foundation of Canada, Lawson Foundation, and Laidlaw Foundation partnered in this joint project to solicit feedback from recent grant recipients.

The objective was to better understand how grant recipients really feel about their interactions and relationship with their funder. In undertaking this project collectively, the three foundations designed a set of common questions and contracted Grantbook to independently administer the survey on their behalf.

This approach allowed for the opportunity to expand the survey pool, gather richer data, and ensure that grant recipients felt comfortable providing honest feedback. It also allowed the foundations to learn from each other regarding their strengths and weaknesses and highlight where areas of commonality exist.

To ensure the privacy of the respondents, the foundations did not have access to individual responses or any personally identifiable information.



Context: Why now?

Funders gathering feedback from grant recipients via a survey is not new in the world of philanthropy. Perhaps the most well-known example of this is the Center for Effective Philanthropy's (CEP) [Grantee Perception Report](#), which over 300 foundations (mainly in the U.S.) have used.

The need for foundations to be fair and transparent in their operations and to recognize that they play a role in the well-being of the organizations they support is stronger than ever. More and more foundations are beginning to understand the power dynamics that can come into play when funding is a key part of conversations with grant recipients.

However, in Canada, the number of foundations, particularly smaller foundations, who have actively sought grant recipient feedback in a deliberate and structured way and then publicly shared their results is limited.

Foundations who want to be responsive and help their grant recipients succeed to the best of their ability must therefore make the time and space for grant recipients and other partners to have a voice and provide honest feedback.

Formal, independently run feedback surveys, such as this one, are one step in the process.

Further Reading

- [Funders that Don't Seek Feedback Are Out of Excuses](#)
- [Soliciting Grantee Feedback: A Benefit to Both Sides](#)

Focus Areas

This survey focused on three common aspects of the grant recipients' experiences across the three foundations. Focusing on these areas allowed the opportunity to gather more meaningful data, ask both quantitative and qualitative questions in each category, while balancing the need to keep the survey concise.

Relationship

The foundations value strong relationships that emphasize open and honest dialogue. Identifying areas of strength and weakness in the relationship with grant recipients is critical to strengthening partnership. This focus area unpacks relationships by asking questions about the communication, approachability, and mutual understanding.

Organizational capacity and non-financial support

Aside from grant dollars, foundations play a role in other ways to help support their grant recipients to succeed, both as an organization and through effective programs. This focus area looks at how grant recipients view this work.

Impact on the field

Ultimately foundations are seeking to make positive social and environmental changes in a complex system. Foundations rely on their grant recipients who are closest to the communities they serve to help them understand the realities of the field and the difference they are making through their grants. This focus area explores how well the foundations are able to understand their impact.

Methodology & Response Rates

Survey population

All current and past grant recipients who have received funding from a core strategic areas of the foundation giving from 2016-2018 were included in the survey. Unsuccessful applicants for grants, and grant recipients from over two years were not included in order to keep the data collected focused and relevant. Only one individual response per grant recipient was considered for the final response rate.

Survey structure and design

Making sure the survey was able to capture meaningful data was balanced by the desire to make the survey manageable for respondents. Long and poorly designed surveys have lower response rates and yield poor data. The average respondent took less than 13 minutes to complete the 15 questions.

CFOC Response Rate:

78%

(31/40)



**Average
Response Rate:**

71%

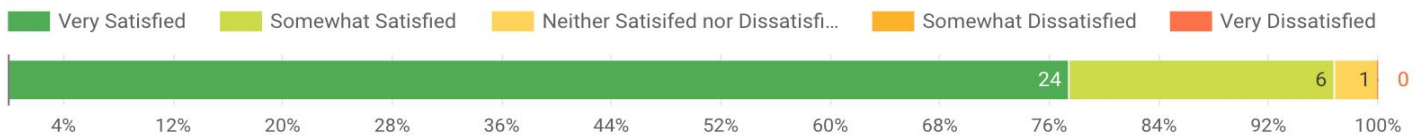
(115/155)

Results

Relationship

How satisfied are you with the Foundation's communication and interaction with you and your organization?

Counselling Score	Average Score
4.70 _{/5}	4.63 _{/5}



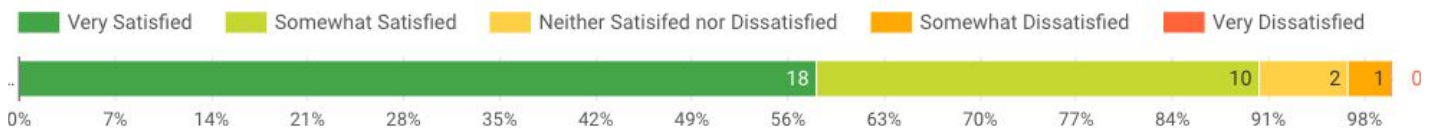
What could the Foundation do to improve the quality of communications and interactions with your organization? What could the Foundation do to make site visits more useful?

Areas For Continued Excellence	Suggestions For Improvement
<ul style="list-style-type: none"> In-person meetings, such as site visits and the conversations that follow are insightful Foundation staff are responsive and open 	<ul style="list-style-type: none"> More informal and regular follow-ups would emerge new ideas, opportunities, or learnings Periodic updates about the sector, other funders, and grant recipients (e.g. a newsletter) During foundation staff transitions, details about projects were not communicated clearly to new staff Respondents would like an opportunity for the Foundation to experience active programming and interact with program participants during site visits Site visits should have a learning-focused agenda and attitude. It would help if the foundation were to bring ideas for ways to continue, to improve, or to scale programming.

Relationship, continued

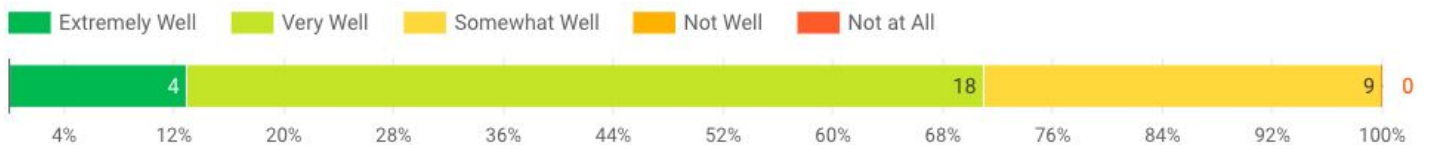
How satisfied are you with your understanding of the foundation's strategy and goals?

Counselling Score	Average Score
4.58 _{/5}	4.58 _{/5}



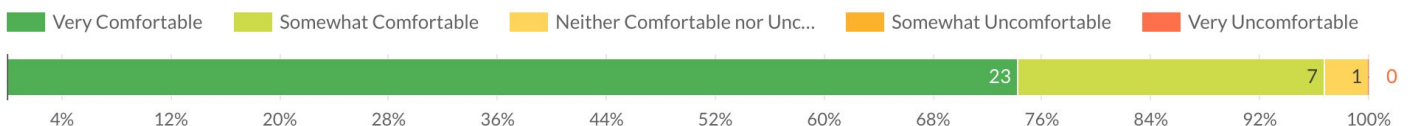
How well does the Foundation understand your organization's strategy and goals?

Counselling Score	Average Score
4.08 _{/5}	4.04 _{/5}



How comfortable are you sharing with us whether a problem has arisen or whether something has not worked as planned?

Counselling Score	Average Score
4.71 _{/5}	4.52 _{/5}

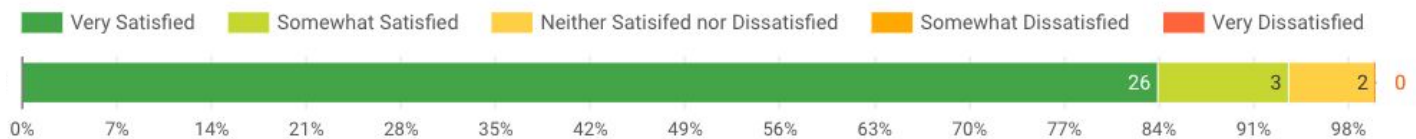


Staff have been extremely helpful and supportive when challenges have arisen. We have always found positive ways to move forward even when the unexpected has arisen over the course of our project.

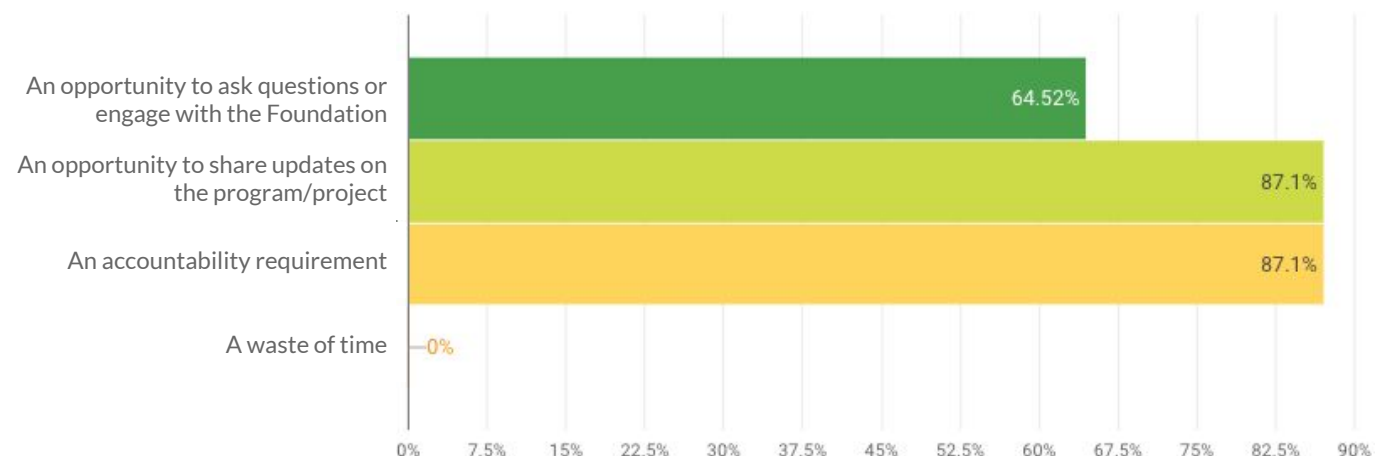
Relationship, continued

How satisfied are you with the foundation's flexibility in terms of accommodating change (e.g., changing deadlines, budgets, or deliverables)?

Counselling Score	Average Score
4.85 _{/5}	4.86 _{/5}



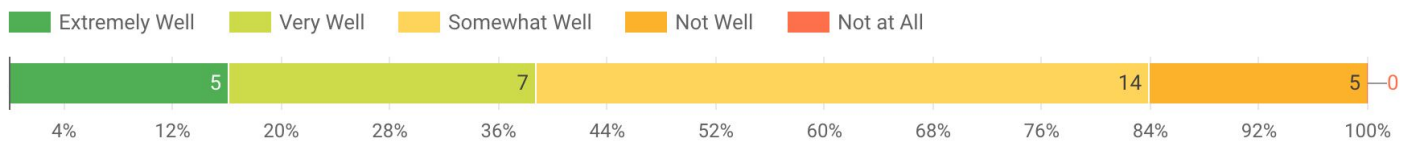
How do you view our reporting process?



Organizational Capacity & Non-Financial Support

How well does the Foundation understand the internal challenges that your organization is facing?

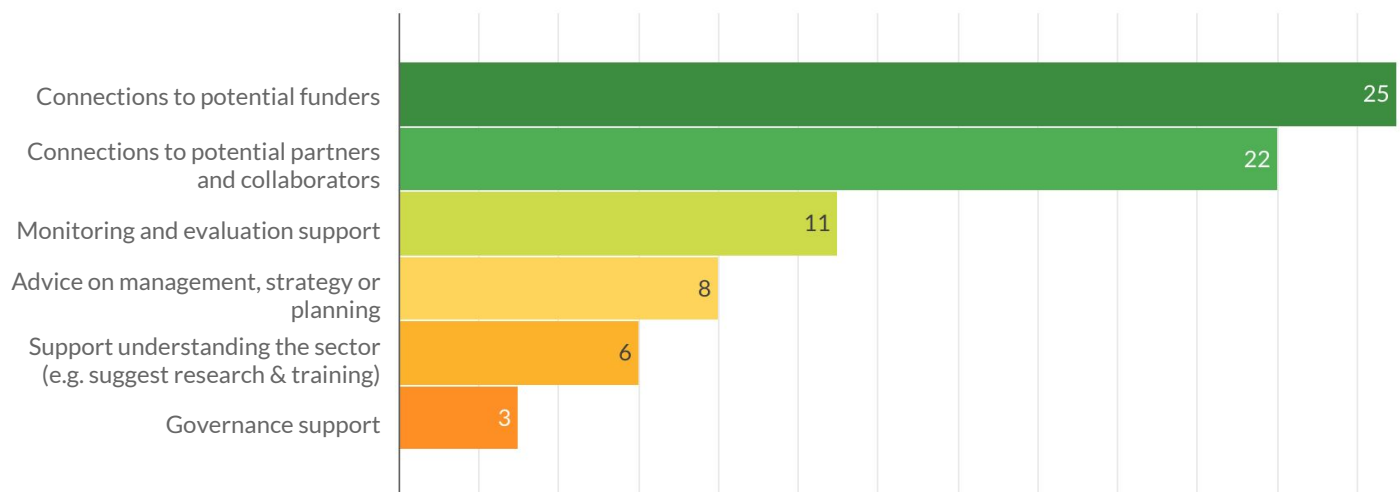
Counselling Score	Average Score
3.60 _{/5}	3.53 _{/5}



What, if any, non-financial support have you received from the Foundation that was particularly useful?

- Connections to partners
- Attending Cannexus
- Monitoring and evaluation support
- Strategy support
- Proposal and report writing
- Marketing and media
- Sector support
- Hosting meetings

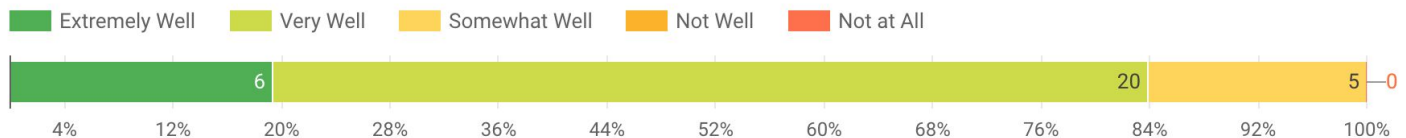
What kind of non-financial support would be most helpful to you?



Impact on the Field

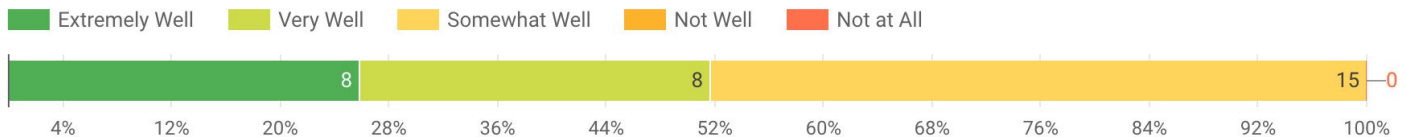
How well does the Foundation understand the work that your organization does?

Counselling Score	Average Score
4.23 _{/5}	4.20 _{/5}

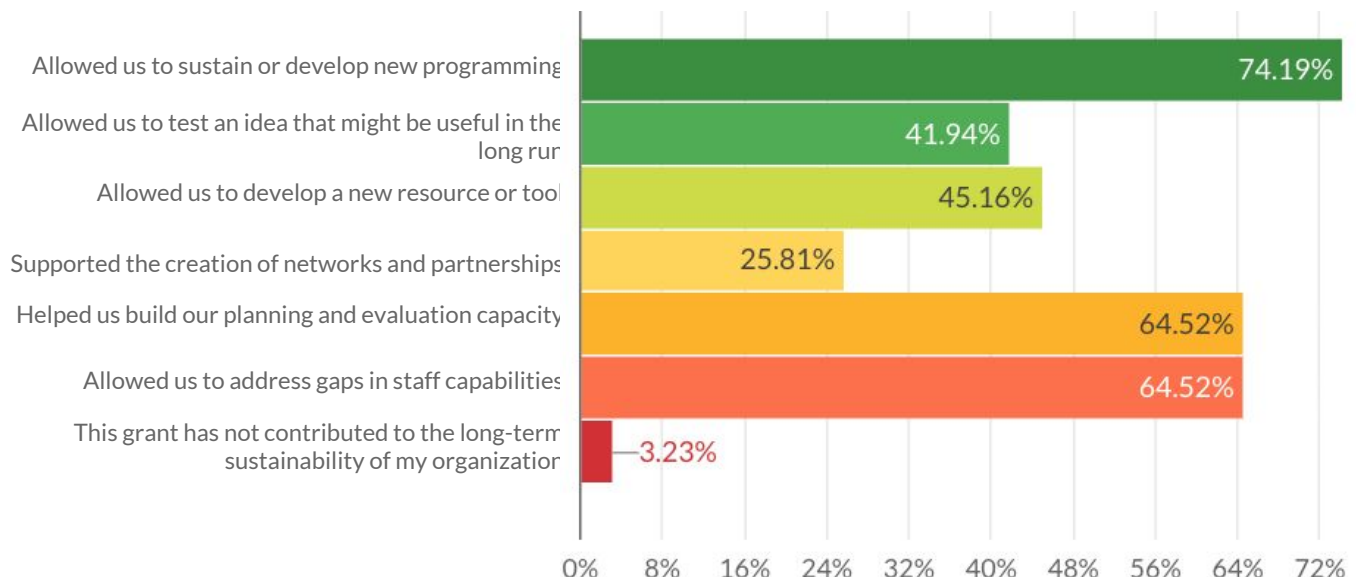


How well does the Foundation understand the complex realities and context in which you work?

Counselling Score	Average Score
3.99 _{/5}	3.98 _{/5}



Has this grant helped the long-term sustainability of your organization?



Impact on the Field, continued

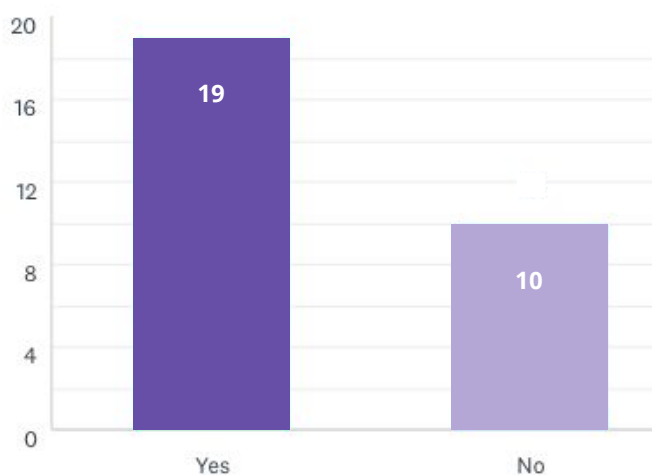
*This grant was **instrumental** in helping us create a critical tool that is now being shared with the wider community.*

*It is **extremely helpful** to have multi-year grants.*

*Our grant helped us **establish our presence** in the immigration space and has led to many other funded projects and initiatives.*

Cannexus

Have you previously attended Cannexus, Canada's bilingual National Career Development Conference?



What would make you more likely to consider attending in the future?

Areas For Continued Excellence	Suggestions For Improvement
<ul style="list-style-type: none"> The opportunity to present is appreciated by respondents 	<ul style="list-style-type: none"> Cost of attendance and travel is a barrier for respondents Clarity about the profile of participants and objectives of the event Respondents were unaware of the opportunity to attend the event

General Comments

Areas For Continued Excellence	Suggestions For Improvement
<ul style="list-style-type: none"> • Collaborative and supportive • Supports and understands career development in Canada • Responsive and receptive • Supporting new (and sometimes risky) ideas • Flexible <p><i>Appreciation and respect for Indigenous approaches</i></p> <p><i>An incredibly helpful, empathetic, enthusiastic and knowledgeable funder.</i></p> <p><i>Your newsletter is amazing. I always find something that adds to my work in there.</i></p>	<ul style="list-style-type: none"> • Consider partnering with other funders to larger collaborative grants • Consider impact investing • More youth engagement • More updates from the foundation (e.g. a newsletter) • Fund overhead not just programs. Help improve organizational capacity. • Help finding more funding • Online reporting • Consider innovative ideas that are challenging to find funding for • Informal follow-up <p><i>So many of us are struggling for funding, but we have to pretend that everything is ok because no one wants to fund a struggling organization. More honesty and understanding of our challenges would be great.</i></p> <p><i>I sincerely wished for more help in finding a continued source of funding... I know we would still be continuing today if I had started developing long-term funding sources from day one.</i></p>



Word Cloud

receptive
Responsive
risky Investment
Communication
Partnership Positive
understands
Communication
Facilitating
Advice Flexible
Amazing
Opportunity Thanks
Understanding
innovative
supportive

What's Next

While we are heartened to know that respondents generally feel we are doing our jobs well, we know there is room for improvement.

Over the coming weeks, we will take the time to process the information we have received and develop a plan of action. We will share our learning and plans as we go and are always happy to chat about our process.

Going forward, the three foundations have committed to the goals of sharing, transparency, and learning to develop strategies for action.

The three foundations also believe this project may offer a model for others in the philanthropic sector who wish to better understand how they can engage with and support their grant recipients.

We will look for ways to tell our story with our peers in the philanthropic space to encourage more engagement and feedback with our nonprofit and charitable partners.



Appendix: Survey Questions

How well does the Foundation understand the following? (5-Extremely well, 4-Very well, 3-Somewhat well, 2-Not well, 1-Not at all)

1. The work that your organization does
2. The complex realities and context in which you work
3. Your organization's strategy and goals
4. The internal challenges that your organization is facing

How satisfied are you with the following? (5-Very satisfied, 4-Somewhat satisfied, 3-Neither satisfied nor dissatisfied, 2-Somewhat dissatisfied, 1-Very dissatisfied)

5. The foundation's flexibility in terms of accommodating change (e.g., changing deadlines, budgets, or deliverables)
6. The Foundation's communication and interaction with you and your organization
7. Your understanding of the foundation's strategy and goals
8. How do you view our reporting process? (*Select all that apply*)
 - An opportunity to ask questions or engage with the Foundation
 - An opportunity to share updates on the program/project
 - An accountability requirement
 - A waste of time
9. In what ways, if any, has this grant helped the long-term sustainability of your organization? (*Select all that apply*)
 - Allowed us to sustain or develop new programming
 - Helped us build our planning and evaluation capacity
 - Supported the creation of networks and partnerships
 - Allowed us to address gaps in staff capabilities
 - Allowed us to develop a new resource or tool
 - Allowed us to test an idea that might be useful in the long run
 - This grant has not contributed to the long-term sustainability of my organization

10. How comfortable are you sharing with us whether a problem has arisen or whether something has not worked as planned? (5-Very comfortable, 4-Somewhat comfortable, 3-Neither comfortable nor uncomfortable 2-Somewhat uncomfortable, 1-Very uncomfortable)
11. What kind of non-financial support would be most helpful to you? (Select up to three)
- Advice on management, strategy or planning
 - Monitoring and evaluation support
 - Support in understanding the sector, recommending relevant research or training
 - Introductions/connections to potential funders
 - Governance support
 - Introductions/connections to potential partners and collaborators