

Grantee Voices

Strengthening Collaboration by Listening to Our Grant Recipients

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PREPARED FOR

LIDLAW
FOUNDATION

PREPARED BY

grantbook

Acknowledgements

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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 (Laidlaw 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.

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. The long-term impacts of the relationship with the foundation include capacity building at both the community level and the organization level.

Organizational capacity and non-financial support

The foundation is not seen as understanding the internal challenges of grant recipient organizations well. However, organization and non-financial support given by the foundation are seen as useful.

Unincorporated grassroots groups

Some Laidlaw foundation grant recipients are an unincorporated grassroots group who have unique challenges and opportunities. 85% of these respondents found the financial and grant reporting process positive.

Results Summary

Praise From Grantees

*The foundation and their staff are **great at listening** to the voices of groups they work with (especially youth and Indigenous communities).*

They were there when we needed them and stepped back when we didn't need them! This is so crucial!

Response Rate:

55%

36/66



*The Foundation **recognizes the reality** of struggles that exist for grassroots organizations. They **affirm the importance** of the ideas of these agencies and looks for opportunities to support the realization of great ideas.*

Areas for Improvement

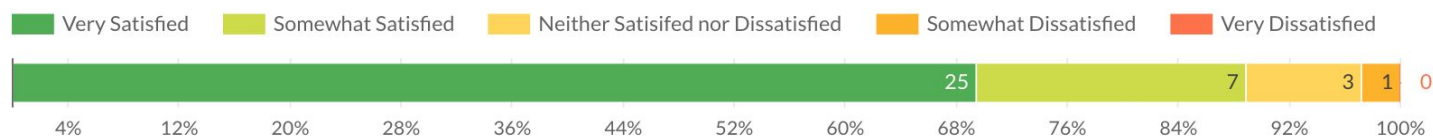
*Create **more opportunities to connect and share** with other grant recipients (e.g. meetups, newsletters, visits to projects)*

***Better communication** is needed, including **timely response** to emails and proposals.*

Response Summaries

Relationship

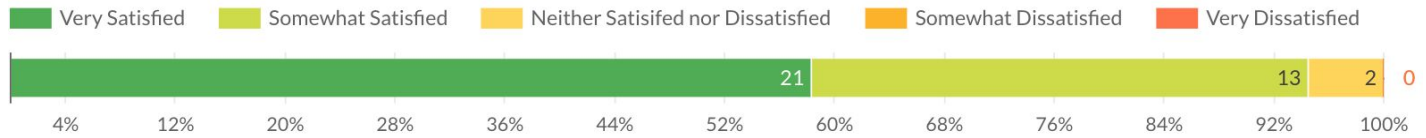
How satisfied are you with the Foundation's communication and interaction with you and your organization? **Average: 4.56/5**



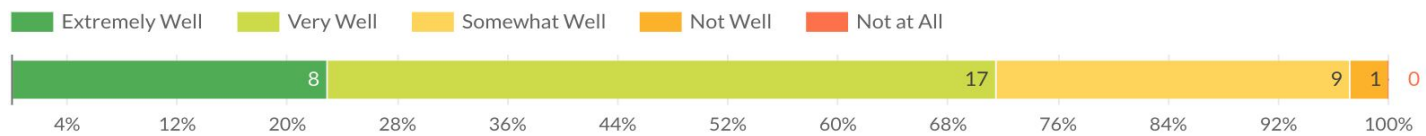
Response Summaries

Relationship, cont'd

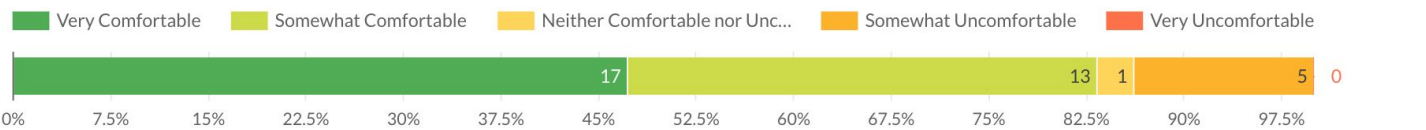
How satisfied are you with your understanding of the foundation's strategy and goals?
Average score: 4.53/5



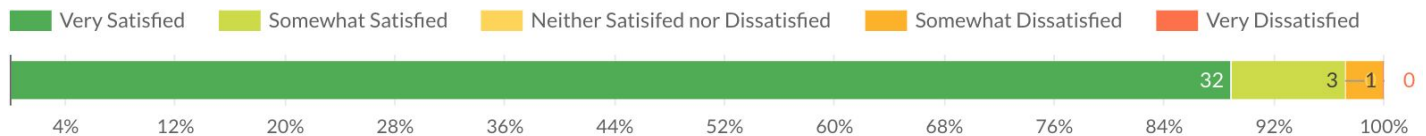
How well does the Foundation understand your organization's strategy and goals?
Average score: 3.81/5



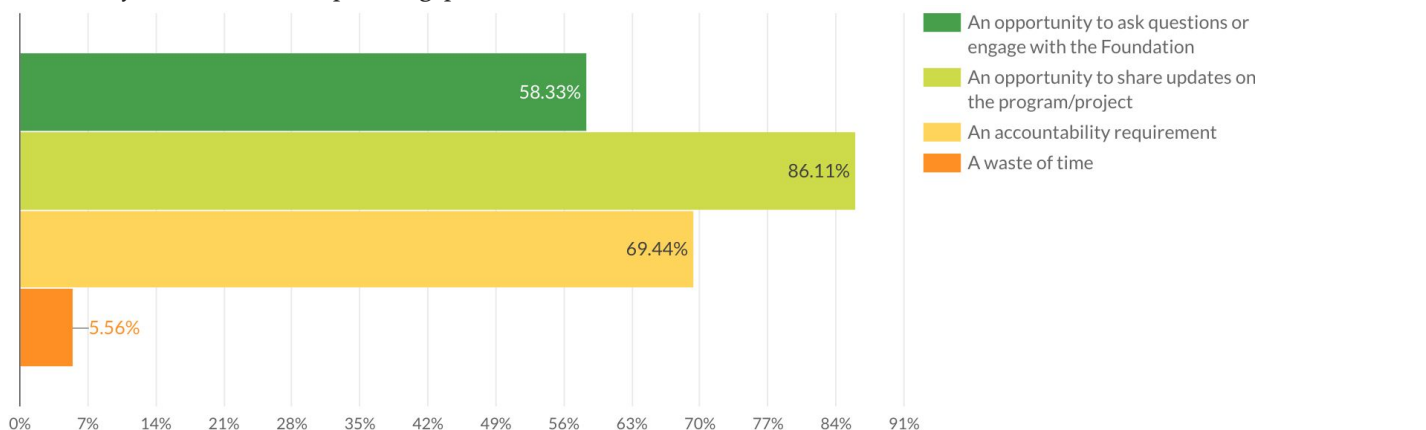
How comfortable are you sharing with us whether a problem has arisen or whether something has not worked as planned?
Average score: 4.17/5



How satisfied are you with the foundation's flexibility in terms of accommodating change (e.g., changing deadlines, budgets, or deliverables)?
Average score: 4.83/5



How do you view our reporting process?

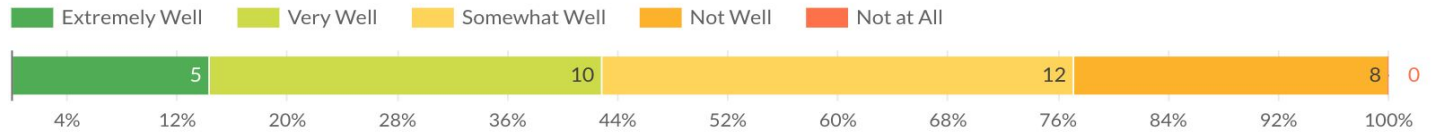


Response Summaries

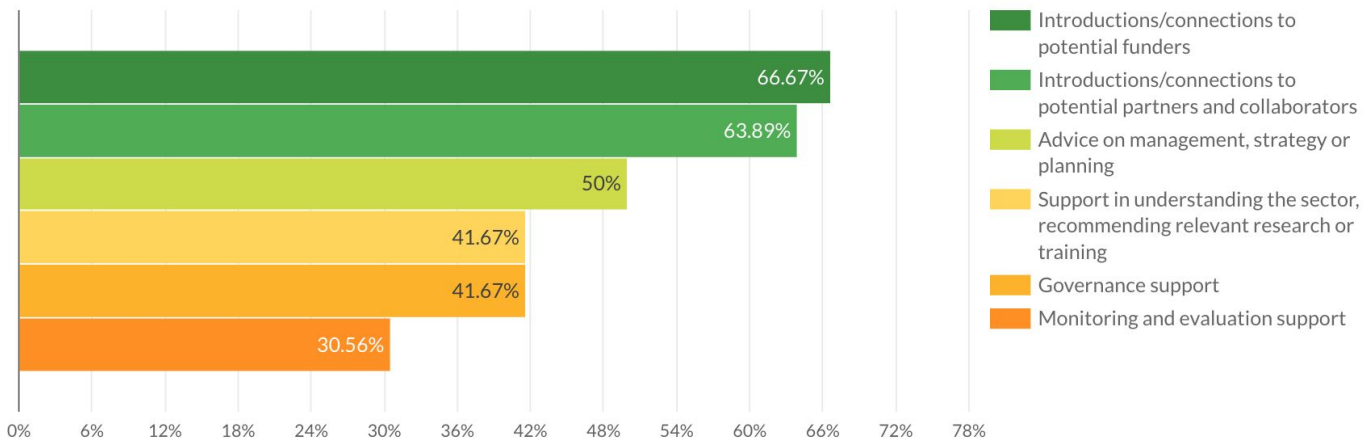
Organizational capacity and non-financial support

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

Average score: 3.25/5



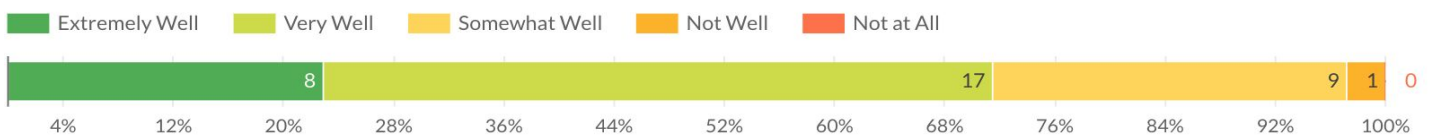
What kind of non-financial support would be most helpful to you?



Impact on the field

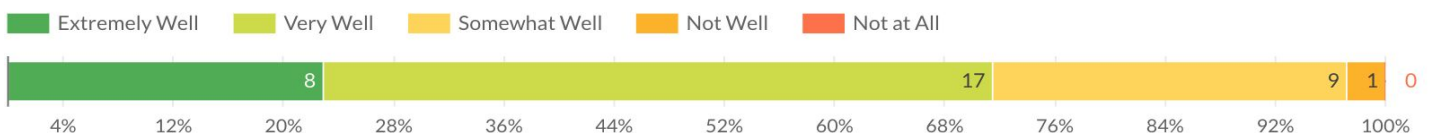
How well does the Foundation understand the work that your organization does?

Average score: 3.97/5



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

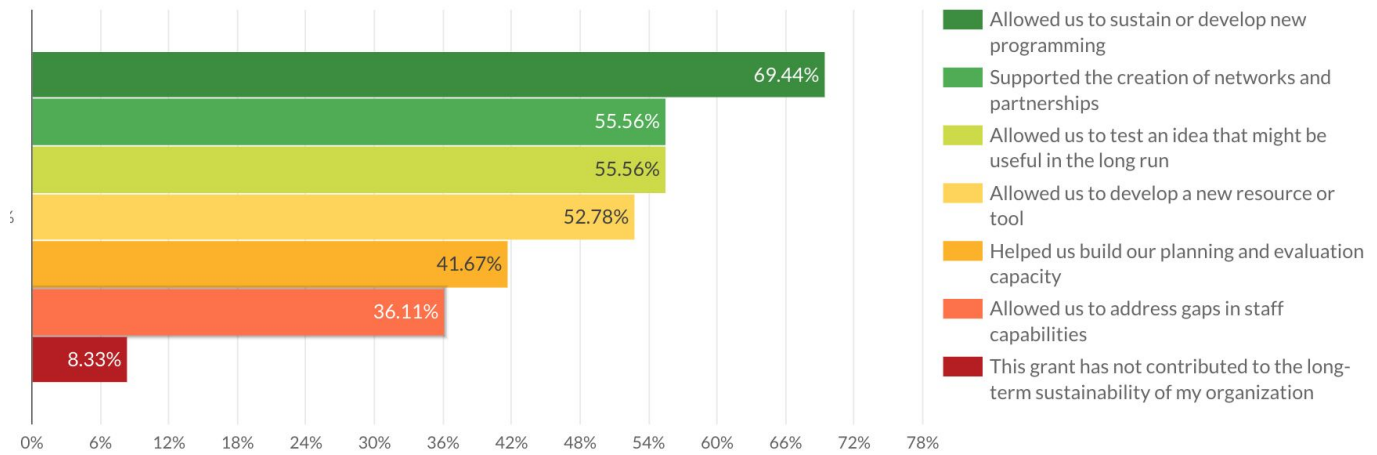
Average score: 3.81/5



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



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.

Unincorporated grassroots groups

Some Laidlaw foundation grant recipients are an unincorporated grassroots group who have unique challenges and opportunities. This focus area explores if unincorporated grassroots groups receive the support they need to work effectively.

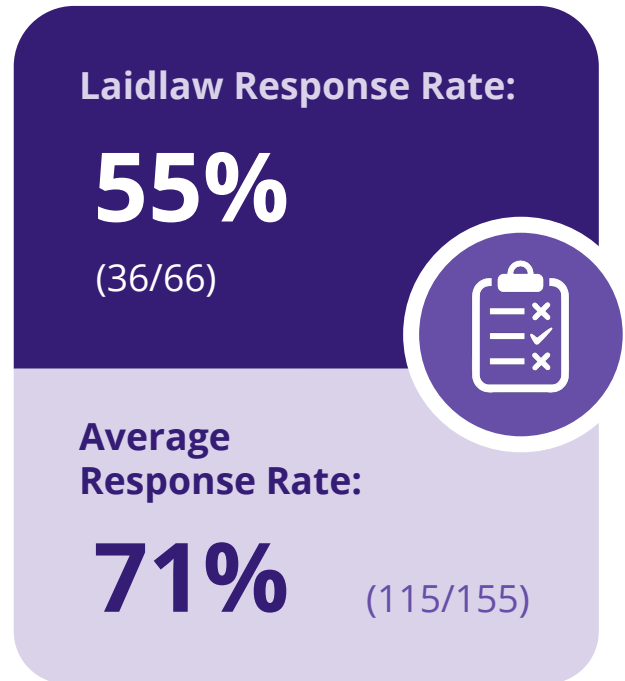
Methodology & Response Rates

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.

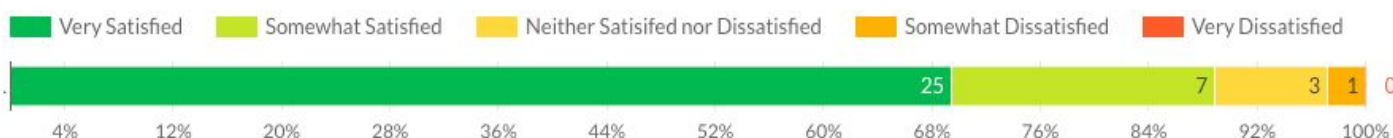


Results

Relationship

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

Laidlaw Score	Average Score
4.56/5	4.63/5



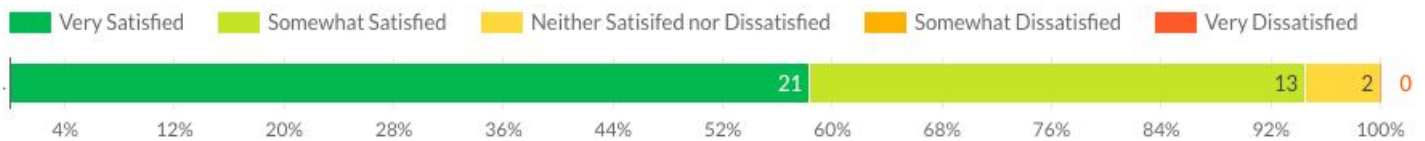
What could the Foundation do to improve the quality of communications and interactions with your organization? What could the Foundation do to make site visits more useful?

Areas For Continued Excellence	Suggestions For Improvement
<ul style="list-style-type: none"> The majority of grant recipients are very satisfied with the communication and interaction. “Great email, social media and newsletters” Staff could “continue to have an open mind so that the cross-cultural conversation continues.” 	<ul style="list-style-type: none"> A need for more check-ins Visit grantees in person to see the work they do Currently a lack of response (i.e. no communication following sending documents such as proposals or grant amendment requests). Make in-person meetings optional, make remote meetings (via web-meeting tools), and consider the timing especially for those working with youth. Give constructive feedback about the implementation Assigned staff that have relevant experience in fields of organizing for their grantee

Relationship, continued

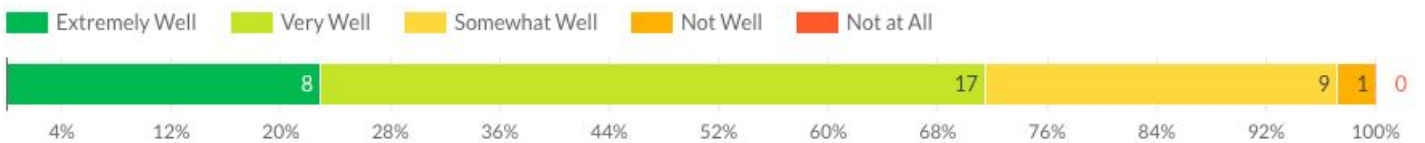
How satisfied are you with your understanding of the foundation's strategy and goals?

Laidlaw Score	Average Score
4.53 _{/5}	4.58 _{/5}



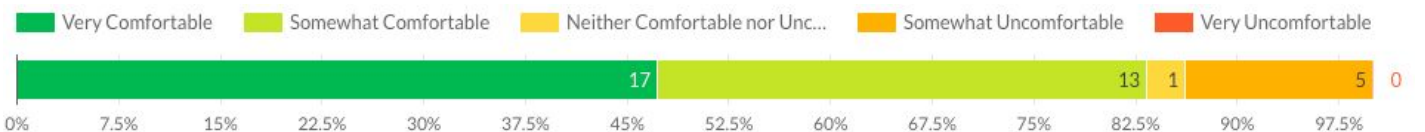
How well does the Foundation understand your organization's strategy and goals?

Laidlaw Score	Average Score
3.81 _{/5}	4.04 _{/5}



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

Laidlaw Score	Average Score
4.17 _{/5}	4.52 _{/5}

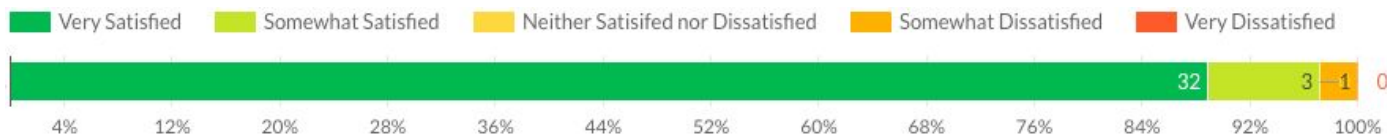


83% of respondents feel comfortable sharing problems and six respondents identified specific problems which they were able to discuss with the foundation who were supportive in finding resolutions. However, 17% respondents do not feel comfortable sharing problems or failures as they don't "want to be seen as a failure" and in order to not risk future funding.

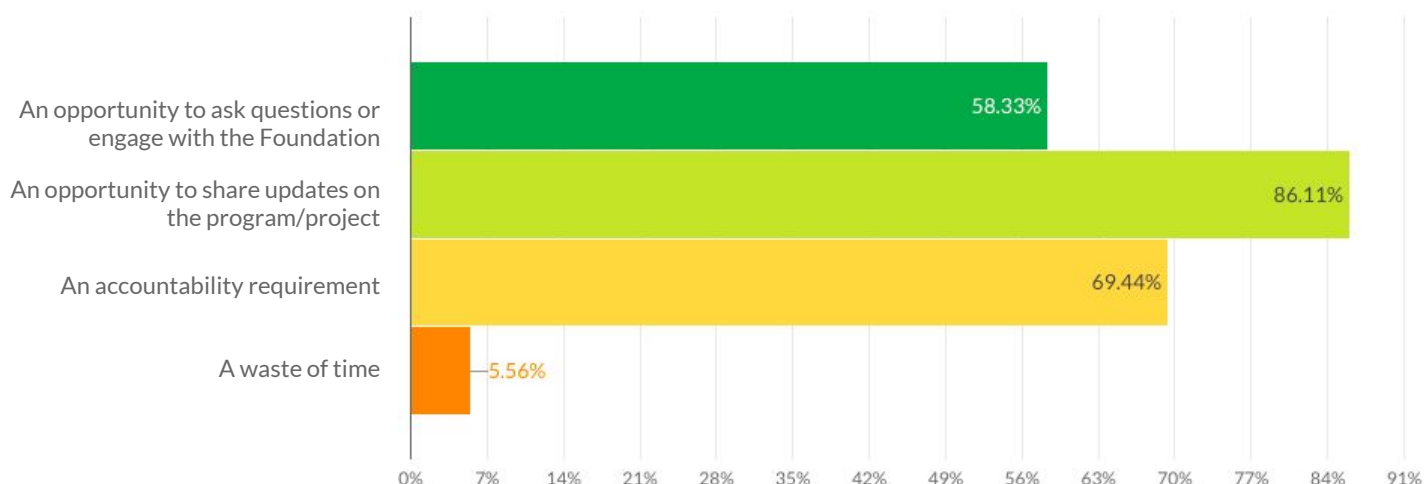
Relationship, continued

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

Laidlaw Score	Average Score
4.83/5	4.86/5



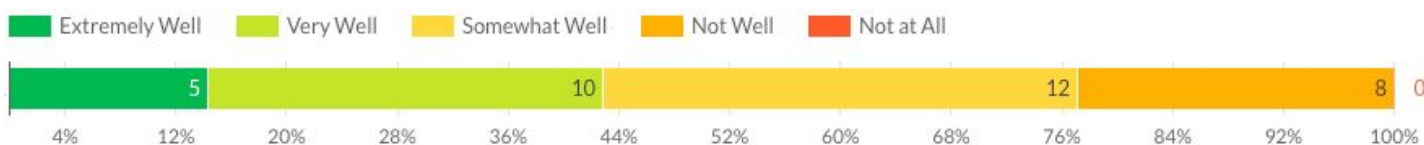
How do you view our reporting process?



Organizational Capacity & Non-Financial Support

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

Laidlaw Score	Average Score
3.25 _{/5}	3.53 _{/5}

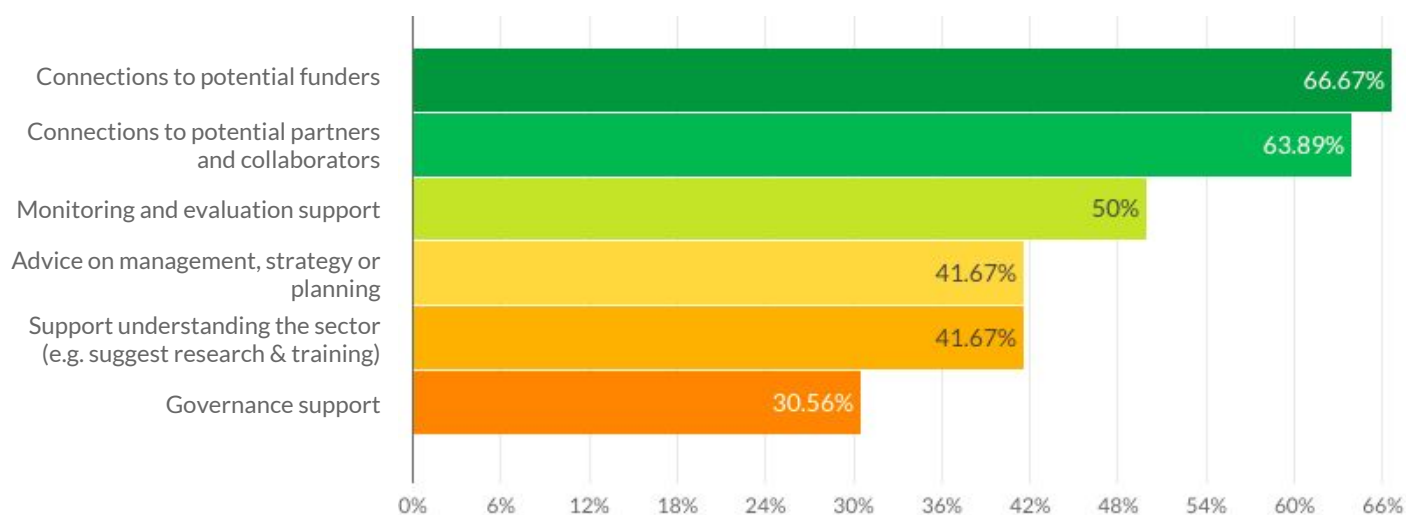


What, if any, non-financial support have you received from the Foundation that was particularly useful?

- Strategy and planning
- Introduction to partners
- Grant writing and application support
- Coaching, mentorship, and learning sessions
- Monitoring and evaluation
- Use of space at Foundation House

[With the conversations we had with staff] we could understand how the funding agency thinks, and they could understand how we think. We could plan our strategies after we had had these conversations... [and] raise our work to a higher level.

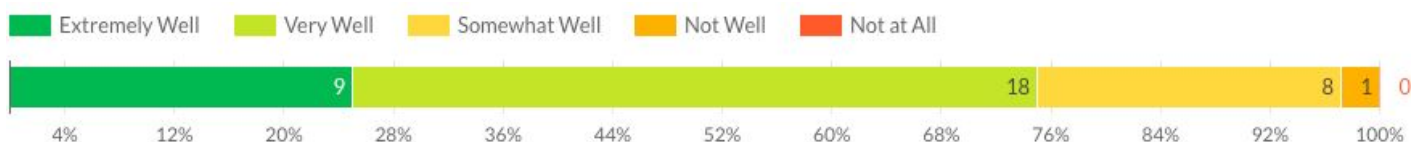
What kind of non-financial support would be most helpful to you?



Impact on the Field

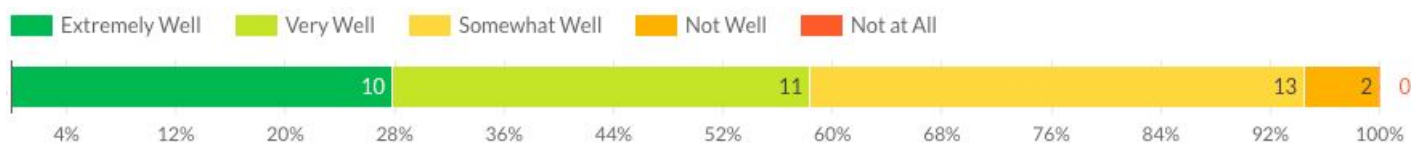
How well does the Foundation understand the work that your organization does?

Laidlaw Score	Average Score
3.97 _{/5}	4.20 _{/5}

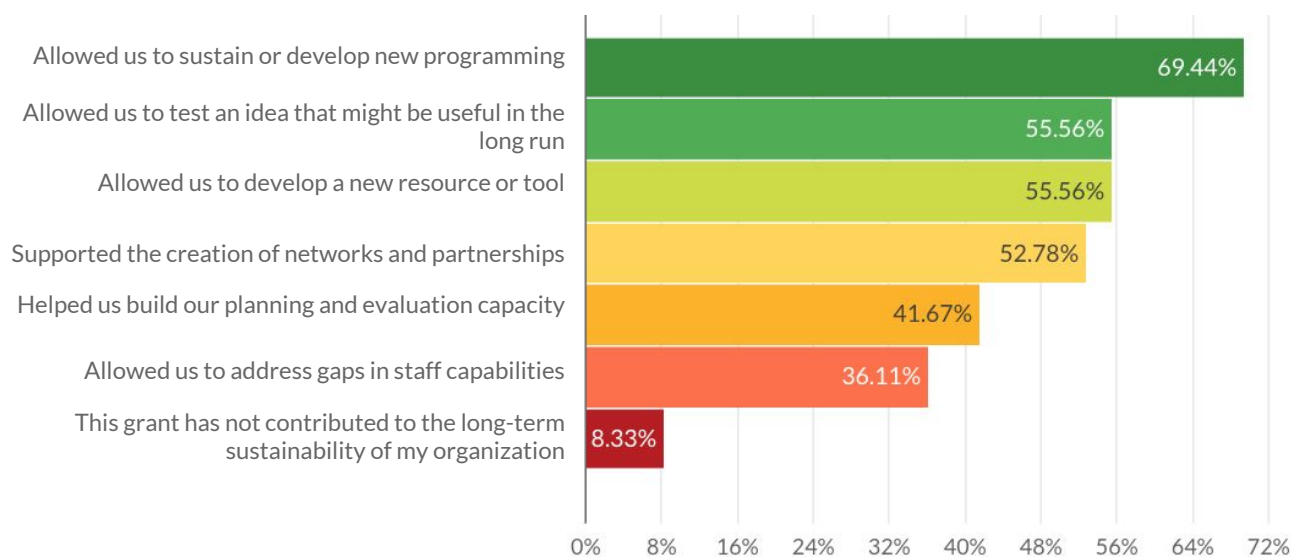


How well does the Foundation understand the complex realities and context in which you work?

Laidlaw Score	Average Score
3.81 _{/5}	3.98 _{/5}



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



Impact on the Field, continued

Four respondents reported that the grants supported capacity building in their communities. The organizations also established more buy-in from the community.

Six respondents reported that the long-term impact of the grant was organizational capacity building (e.g. great professionalism, better online presence, ability to gain visibility from other funders).

Unincorporated Grassroots Groups

Over half (51%) of respondents received grants as an unincorporated grassroots group and were asked about their experiences of receiving a grant.

These respondents found the process very supportive and found the feedback and responses provided by Laidlaw useful.

For grant and financial reporting requirements, 85% of these respondents found the reporting process positive. Two respondents found the reporting cumbersome.

They were there when we needed them and stepped back when we didn't need them! This is so crucial!

General Comments

Areas For Continued Excellence	Suggestions For Improvement
<ul style="list-style-type: none"> • Listening to the voices of groups they work with (especially youth and Indigenous communities). • Realistic about obstacles and challenges. • Non-judgemental and understanding • Flexibility • Granting streams that respond to emerging and critical issues • Supportive • The foundation is clear about their vision and direction • Knowledgeable • Actively works with and supports partners • Allow grant recipients the space to do their work • Working in rural areas and First Nations communities • Supportive during the application and planning process • Innovative approach to grants <p><i>I think they are an extremely radical funder and allow programs that make a big difference the chance to better their communities.</i></p> <p><i>It is amazing that Laidlaw makes space to fund grassroots community organizing. This is so valuable. And that they make space for grassroots to partner with nonprofits.</i></p> <p><i>The Foundation recognizes the reality of struggles that exist for grassroots organizations. They affirm the importance of the ideas of these agencies and looks for opportunities to support the realization of great ideas.</i></p>	<ul style="list-style-type: none"> • Create more opportunities to connect and share with other grant recipients (e.g. meetups, newsletters) • The process to receive funding is long for some organizations • Better communication is needed, including timely response to emails and proposals • Consider longer-term funding for grassroots organizations • The foundation should do visits to funded projects • Incorporate grantees in "Think Lab" <p><i>Just keep an open mind, do not insist on structures the partners feel alienated with or which are an obstacle to successful problem solving.</i></p>

Word Cloud



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