

GRANTEE PERCEPTION REPORT

Prepared for
Headwaters Foundation
March 2023



THE CENTER FOR
EFFECTIVE PHILANTHROPY

About CEP

CEP provides data, feedback, programs, and insights to help individual and institutional donors improve their effectiveness.

We do this work because we believe effective donors, working collaboratively and thoughtfully, can profoundly contribute to creating a better and more just world.



ASSESSMENTS



RESEARCH



PROGRAMMING

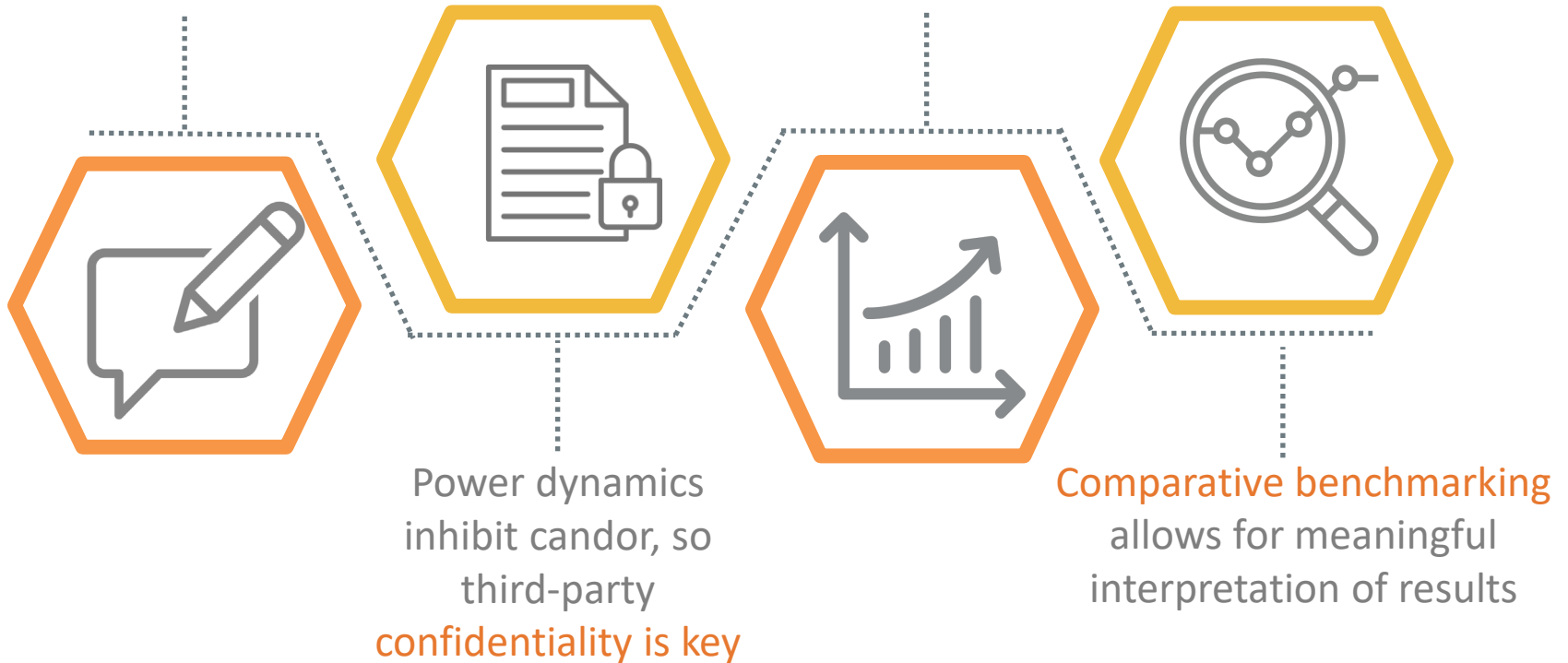


ADVISORY SERVICES

GPR: Confidential and Comparative

Grantees have
insightful feedback
to share

Receiving a grant is
inherently positive, so
grantee feedback is skewed



Agenda

- Survey Methodology
- Field and Community Impact
- Organizational Impact
- Relationships with Grantees
- Recommendations from CEP

Grantee Survey Population

Survey Fielded	Number of Grantees Surveyed	Responses Received	Response Rate
September and October 2022	140	99	71%
Average GPR Response Rate			65%

Subgroup Analysis

- Reviewed ratings by Grant Type, Annual Organizational Operating Budget, and BIPOC in Leadership

Grantee Comparative Dataset

More than 300 foundations

More than 50,000 grantee responses



Custom Cohort

Blue Cross and Blue Shield of
North Carolina Foundation

LOR Foundation

Maine Health Access Foundation

MetroWest Health Foundation

Moses Taylor Foundation

Mt. Sinai Health Care Foundation

Quantum Foundation

REACH Healthcare Foundation

Stolte Family Foundation

Stupski Foundation

The Cameron Foundation

The Denver Foundation

The Healing Trust

Thornburg Foundation

Williamsburg Health Foundation

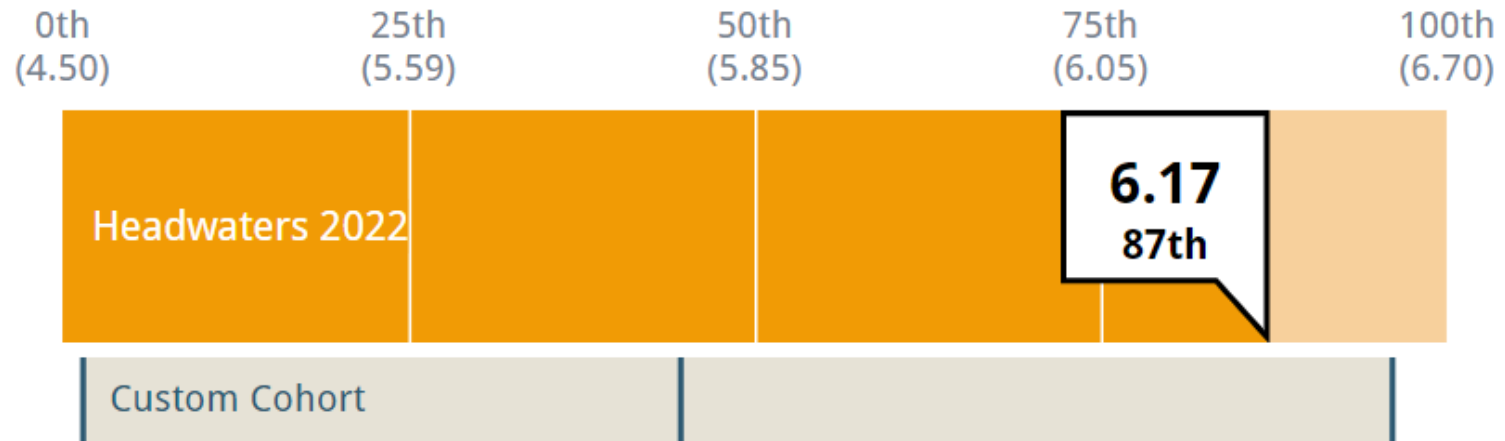
Wiregrass Foundation

Headwaters Foundation

FIELD AND COMMUNITY IMPACT

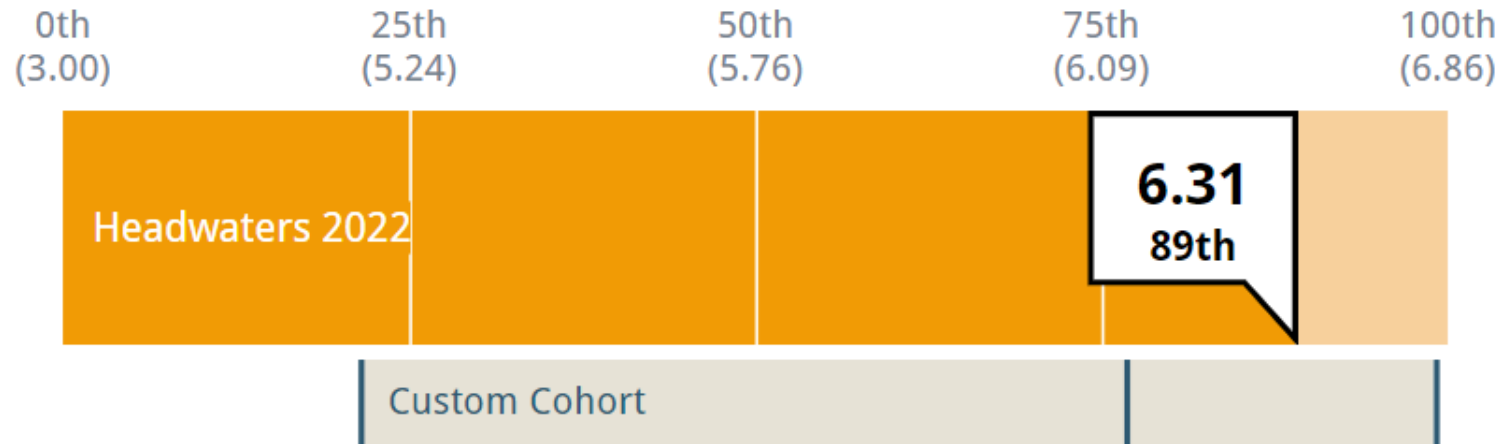
“Overall, how would you rate the Foundation’s impact on your field?”

1 = No impact, 7 = Significant positive impact



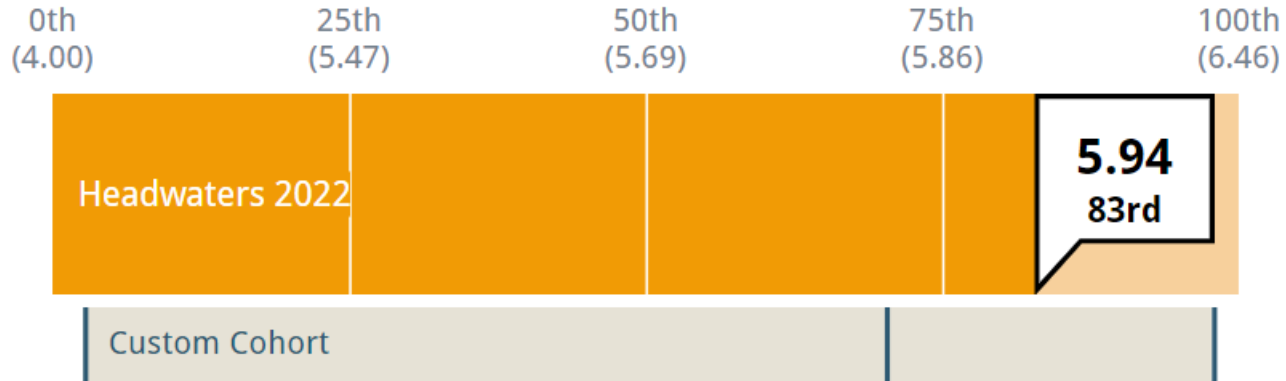
“Overall, how would you rate the Foundation’s impact on your local community?”

1 = No impact, 7 = Significant positive impact



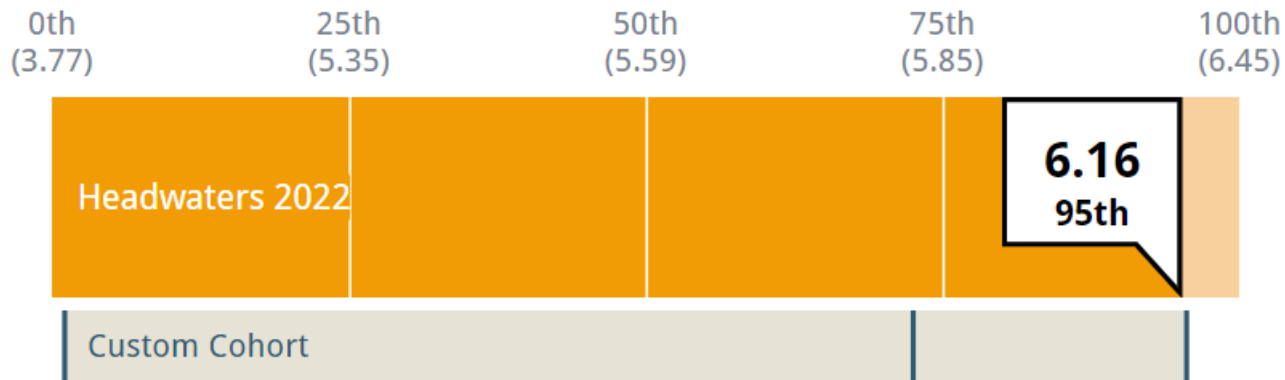
“How well does the Foundation understand the needs of the people and communities that you serve?”

1 = Limited understanding, 7 = Thorough understanding



“To what extent do the Foundation's funding priorities reflect a deep understanding of the needs of the people and communities that you serve?”

1 = Not at all, 7 = To a great extent





*“Headwater's funding of the Zero to Five Statewide office...does such **incredible policy work** that allows for the state level conversations to filter down to community level change.”*

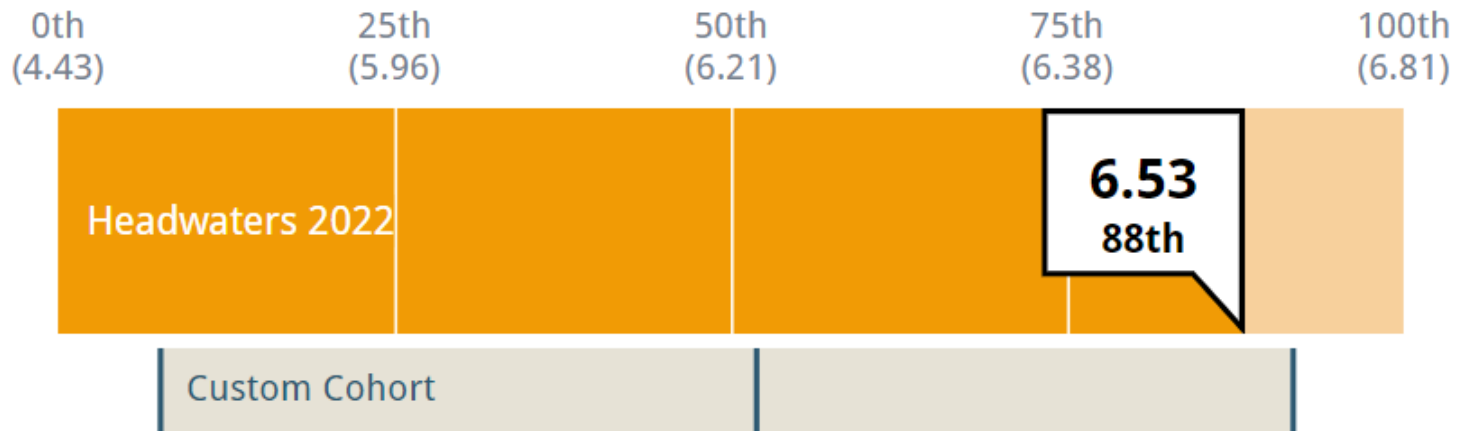


*“[After] working very closely for many years with a few of the top foundations in the country, the Headwaters Foundation is at the top of the list. Great leadership, open communication, truly focused on making communities better and **understands and appreciates the issues and nuances of each community.**”*

ORGANIZATIONAL IMPACT

“Overall, how would you rate the Foundation’s impact on your organization?”

1 = No impact, 7 = Significant positive impact



“We wish all foundations could be this easy to work with.

They keep our needs in mind and align with our priorities, but really let us do the work without any unnecessary interference.”

Grantmaking Characteristics

	GO! Grants	Policy/Strategic Initiative Grants	Median Funder
Median Grant Size	\$8K	\$115K	\$100K
Proportion of Multiyear Grants	24%	74%	51%
Proportion of Unrestricted Grants	55%	48%	21%
Grant Dollars Per Process Hour Over Lifetime of Grant	\$1.7K	\$9.6K	\$2.8K
Proportion Receiving Non-Monetary Assistance	24%	68%	38%



*“The foundation gives the **financial and emotional support** needed to get our vital community projects off the ground and then helps us think on different ways to become sustainable.”*

Non-Monetary Support

34%

of Headwaters grantees
report receiving
non-monetary support

vs.

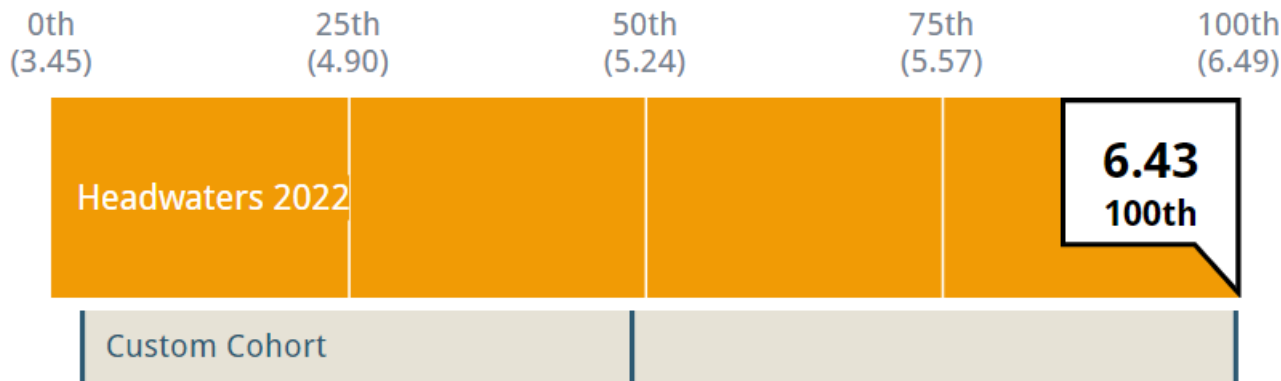
38%

of grantees at the typical funder
report receiving
non-monetary support

Headwaters grantees who report receiving non-monetary support rate **significantly more positively** on several survey measures, including relationship measures.

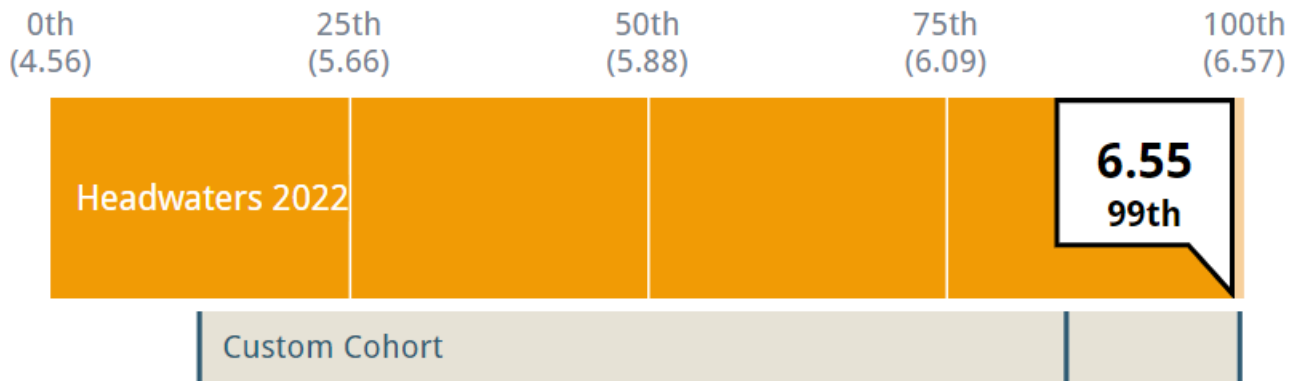
“To what extent was the Foundation’s grant award process a helpful opportunity to strengthen the efforts funded by the grant?”

1 = Not at all, 7 = To a great extent

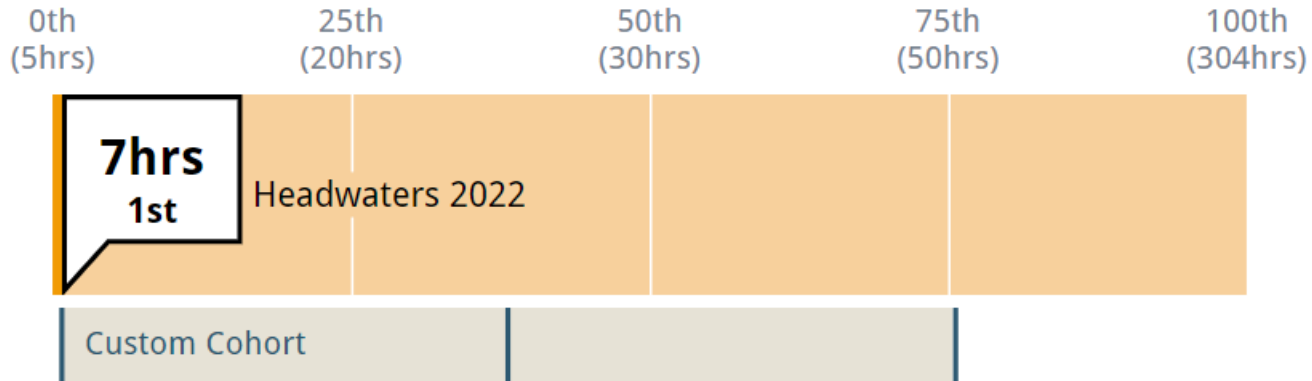


“To what extent was the Foundation's reporting process a helpful opportunity for you to reflect and learn?”

1 = Not at all, 7 = To a great extent



Median hours spent by grantees on funder requirements over grant lifetime



*“We deeply appreciate your staff, your processes, values and consciousness of organization's limited time and resources. **You have employed appropriate measures for the integrity of grantees without placing too much burden on them.** Thank you!”*

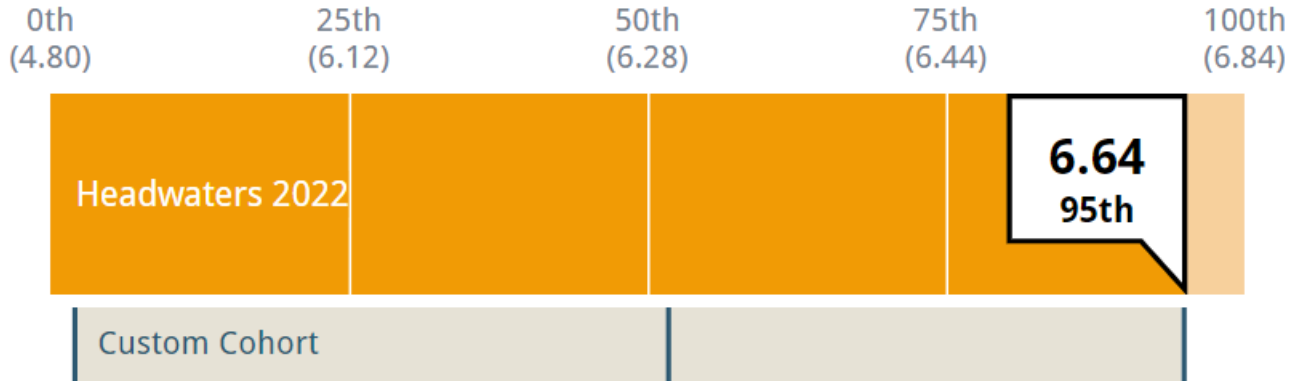


*“**The grant process is the least labor intensive of any grant received.** I appreciate that it is not over complicated and that the foundation is diligent about communicating with me.”*

RELATIONSHIPS

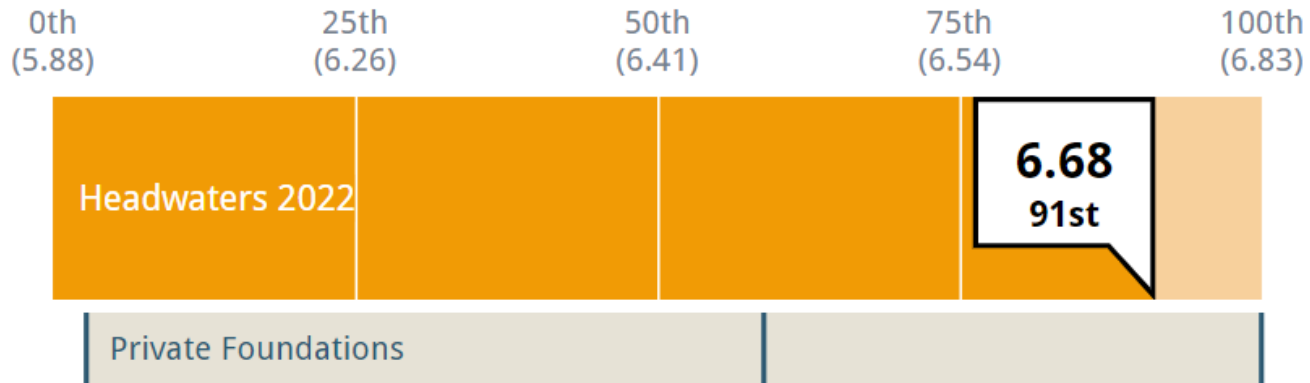
“How comfortable do you feel approaching the Foundation if a problem arises?”

1 = Not at all comfortable, 7 = Extremely comfortable



“To what extent did the Foundation exhibit trust in your organization's staff during this grant?”

1 = Not at all, 7 = To a great extent





*“The individuals working for the Headwaters Foundation are **super responsive, professional, and engaged**. We are very appreciative of their support and that they seem genuinely concerned about our work.”*



*“Our intent for the grant was understood and backed by the Foundation staff, and they wanted to simply **help us get things going with as few complications as possible**...We have found the engagement and conversations to give us openings to find further help, advice, and assistance from the Foundation and its staff.”*

Interaction Patterns

18%

of grantees report their **main contact at the Foundation changed** in the past six months

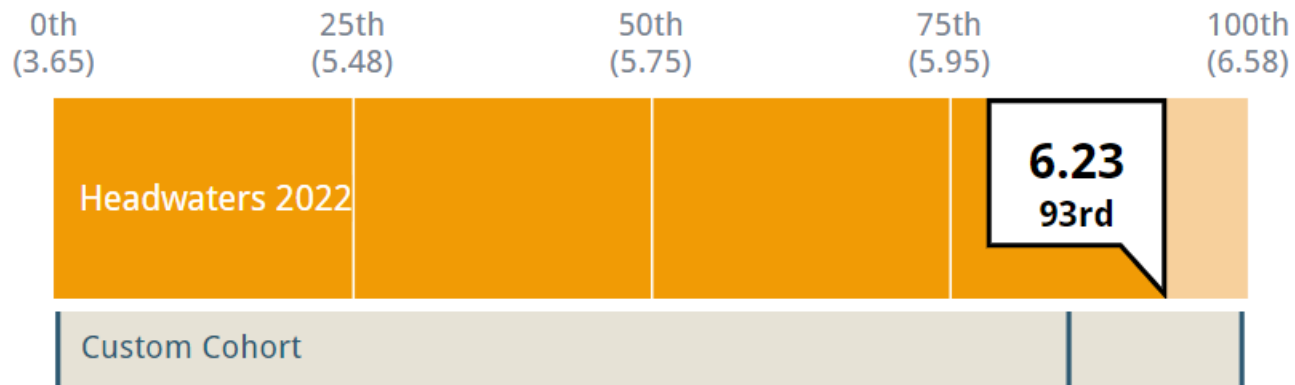
18%

of grantees report contact with the Foundation was most frequently **grantee initiated**

Grantees in each of these categories rate **significantly lower** than their counterparts on several survey measures spanning themes of relationships and understanding.

“How clearly has the Foundation communicated its goals and strategy to you?”

1 = Not at all clearly, 7 = Extremely clearly



*“I would suggest **making a greater effort to tell their story** and the outcomes from the community to a broader segment of the population.”*

CEP Recommendations



Consider which aspects of Headwaters Foundation's values, systems, and structures are contributing to grantees' strong perceptions. Work to ensure these **strengths are reinforced**



Celebrate and maintain the practices contributing to the Foundation's **strong relationships**



Continue to identify opportunities to **clearly communicate** the Foundation's stories of impact more broadly.



Thank You.