

# PERSPECTIVES

## INSIGHTS ON WINNIPEG FOUNDATION GRANTMAKING



PRESENTED BY

THE  
WINNIPEG  
FOUNDATION



Your Community Foundation  
For Good. Forever.

RELEASED  
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## GRANT RECIPIENTS TELL US HOW WE'RE DOING

In our ongoing community leadership work, The Winnipeg Foundation looks for opportunities to elevate the conversations, and shine a spotlight on the issues, that are important to our community – particularly the charitable sector. Along with being a grantmaker, The Foundation undertakes research and community initiatives to help inform our work, and to further our vision of ‘a Winnipeg where community life flourishes for all’.

We value our relationships with community organizations that receive grants from us. But we know it can often be challenging for charities to provide honest feedback to funders. That’s why The Foundation contracted the Centre for Effective Philanthropy (CEP) to conduct an anonymous survey of organizations that have recently received funding from our Community Grants Program.

The survey solicited feedback on a variety of topics: our impact on, and understanding of, community and the organizations that work within it; our relationships with community organizations; and our grant processes and communications. The resulting report provides both quantitative and qualitative data; respondents had an opportunity to give The Foundation a score in a number of areas, as well as provide detailed answers to open-ended questions. This publication, ***Perspectives Insights on Winnipeg Foundation Grantmaking***, provides an overview of what we heard, along with our response; the full report from CEP can be found on our website.

We are grateful to those organizations that took time to complete the survey and provide thoughtful comments about working with The Winnipeg Foundation. Both the survey results and the comments will inform our work going forward.

We look forward to ongoing dialogue and collaboration with Winnipeg’s charitable sector and welcome your questions and comments about this publication.



Richard L. Frost, CEO,  
The Winnipeg Foundation



Megan Tate, Director of Community Grants,  
The Winnipeg Foundation

## SURVEY PARTICIPANTS

In September and October of 2018, The Centre for Effective Philanthropy (CEP) sent surveys to 229 organizations that received a Community Grant from The Winnipeg Foundation between January 2017 and May 2018. This included organizations that received a One-Time, Multi-Year or Major Capital Community Grant.

176 organizations responded, for a survey response rate of 77%. Respondents were further broken down by program area:

Program Area	Number of Responses
Arts and Culture	35
Community Service	74
Education and Employment	20
Environment	5
Health	23
Heritage	10
Recreation	9

## COMPARATIVE COHORTS

Throughout the report, The Winnipeg Foundation's survey results are compared to CEP's broader dataset of more than 40,000 grantees gathered over more than a decade of grantee surveys of more than 250 funders. In some of their analysis, CEP also provides comparisons to the 34 community foundations in the Grantee Perception Report (GPR) dataset, as well as a custom cohort of 15 community foundations that most closely resemble The Winnipeg Foundation in scale and scope.

# KEY FINDINGS AND RECOMMENDATIONS FROM THE WINNIPEG FOUNDATION 2018 GRANTEE PERCEPTION REPORT

The following section was prepared by CEP to provide The Winnipeg Foundation with an overview of key findings, along with recommendations for going forward.

## PERCEPTIONS OF COMMUNITY IMPACT

- Grantees view The Winnipeg Foundation as having a strong positive impact on their local communities, providing ratings that are higher than those of the typical funder in CEP's overall dataset, those of the typical community foundation, and those in Winnipeg's cohort of peer community foundation funders.
- Winnipeg Foundation grantees also provide higher than typical ratings for The Foundation's understanding of their local communities.
- In their open-ended responses, grantees often champion The Foundation's role as a leader in the community, providing comments such as:
  - "[The Winnipeg Foundation's greatest strength is] taking the needs of [our] community and designing funding for needs that aren't being addressed."
  - "The Winnipeg Foundation understands and supports Winnipeg (and the surrounding region) [and has] in-depth knowledge on the community itself. As an organization that relies on community partnerships, [The Foundation is] invaluable."
- Still, grantees rate The Foundation less positively than the typical funder for its understanding of their social, cultural, and socioeconomic contexts, their beneficiaries' needs, and the extent to which The Foundation's funding priorities reflect a deep understanding of their beneficiaries' needs.
  - For all three of these measures, the median rating for community foundations and The Foundation's custom cohort is lower than the median rating for the overall dataset, suggesting perhaps that community foundations generally have more challenges in these areas.

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**“I believe the Foundation sees the value of the type of work we do.”**

## **POSITIVE IMPACT ON GRANTEES’ ORGANIZATIONS WITH OPPORTUNITY TO PROVIDE MORE NON-MONETARY SUPPORT**

- Winnipeg Foundation grantees provide higher than typical ratings for The Foundation’s impact on their organizations.
- While grantees report receiving grants that are smaller and shorter than those of the typical funder, ratings for The Foundation’s impact on grantees’ ability to sustain their funded work are similar to the typical funder.
- Still, in their suggestions for how The Foundation could improve, nearly half of grantees who shared comments mentioned The Foundation’s grantmaking characteristics, which is the most common category of themes. Specifically, 10 grantees requested more flexibility during grant award and transition periods, eight requested larger grants, four requested longer grants, and four requested more general operating support.
  - These suggestions should be interpreted in light of the current pilot project for multi-year grants at The Foundation.
  - Those grantees who report receiving multi-year grants rate significantly higher on many key measures in the report, including The Foundation’s impact on and understanding of grantees’ organizations, its awareness of grantees’ challenges, and the quality of its relationships with grantees.

### **Requests for more support beyond the grant cheque**

- A smaller than typical proportion of Winnipeg Foundation grantees (four percent) report receiving intensive patterns of non-monetary support – in which they receive several different types of assistance beyond their grant. CEP’s research shows that intensive patterns of non-monetary support are associated with more positive perceptions of impact on grantees’ organizations
  - When asked how The Foundation could improve, 11 grantees asked for more non-monetary support, the second largest theme among all suggestions, such as assistance with securing other funding sources, capacity building, and organized convenings.

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**“The multi-year grants currently offered are helpful for organizations to plan and work toward achieving sustainability. Some adjustments of timelines could be considered.”**

## **STRONG RELATIONSHIPS WITH GRANTEES WITH OPPORTUNITY TO IMPROVE INTERACTION PATTERNS**

- CEP’s research finds that strong funder grantee relationships – defined by high-quality interactions and clear, consistent communications – are a key predictor of grantees’ perceived impact on their organizations, fields and local communities.
- The Winnipeg Foundation receives higher than typical ratings for the quality of its relationships with grantees, including its responsiveness, approachability when a problem arises, and the clarity and consistency of its communications.
  - Grantees describe Foundation staff as “clear, helpful and genuine”, “polite, knowledgeable and responsive”, and “willing to assist at all times”.
- In addition, grantees provide ratings that are higher than typical for The Winnipeg Foundation’s overall transparency, placing The Foundation in the top quarter of the comparative dataset and at the top of its custom cohort.
- Survey responses suggest that consistent, personal engagement with Winnipeg Foundation staff is crucial in shaping grantees’ experiences, particularly regarding relationships and understanding of grantees’ organizations. CEP recognizes that The Foundation has undergone various staff changes during the period of active grants included in the survey.
  - A larger than typical proportion of grantees – 26 percent – report undergoing a contact change in six months prior to taking the survey.
  - Winnipeg Foundation grantees who did not experience a contact change rate significantly higher for its understanding of their communities, beneficiaries’ needs, contexts, and for staff’s responsiveness.
- When it comes to contact frequency, a larger than typical proportion of grantees report interacting with their grants associate yearly or less often – 37 percent compared to 18 percent at the typical funder.
  - Grantees who report interacting with their grants associate at least a few times a year provide significantly higher ratings for the overall quality of their relationships with the Foundation.
  - Winnipeg Foundation grantees also often report being the party to most frequently initiate contact with their grants associate – 50 percent compared to 35 percent at the typical funder.

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**“I found the representatives of the Foundation to be open and honest, genuinely interested in our organization and the success of our funded program and very approachable.”**

## **SMOOTH SELECTION AND REPORTING PROCESSES WITH ROOM TO IMPROVE ENGAGEMENT WITH GRANTEES**

- Grantees’ perceptions of the reporting process are generally positive with The Winnipeg Foundation receiving higher than typical ratings for the extent to which the process was straightforward, relevant, and aligned appropriately to the timing of the funded work.
  - Grantees also provided similar to typical ratings for the extent to which the process was adaptable and a helpful opportunity for reflection and learning.
- Winnipeg Foundation grantees rate similar to grantees of the typical funder for the extent to which The Foundation’s selection process was helpful in strengthening their organizations or programs.
  - When it comes to the development of their proposal, grantees report experiencing a lower than typical level of involvement by Foundation staff.
  - Additionally, though the process takes grantees less time than is typical, a larger than typical proportion of grantees, roughly double than the average funder, report waiting four months or more between the submission of their application to clear commitment of funding.
  - In their open ended comments, seven grantees encouraged The Foundation to streamline its selection process and shorten the time between submission and approval, among other suggestions.
- Further, a smaller than typical proportion of grantees – 33 percent – report having exchanged ideas with The Foundation about how to assess the results of the funded work.
  - Those grantees who do report having such discussions rate the Foundation significantly higher for the helpfulness of the selection process and the extent to which the reporting process is a helpful opportunity for reflection and learning.
  - Furthermore, grantees indicate that, among a range of options, having discussions with staff during the selection process is the most effective way the Foundation can support their organizations’ efforts to track and learn from results.

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**“The small grassroots organizations have such a difficult time filling out grant applications and reporting because there is not enough time and people.”**

## RECOMMENDATIONS

- Recognizing The Foundation's positive impact on and strong presence in the community, consider which aspects of its values, behaviors, and approaches have contributed to these perceptions and reinforce these strengths.
- Building on The Foundation's strong understanding of the local community, seek opportunities to deepen or demonstrate knowledge of grantees' contexts and beneficiaries' needs.
- If it is a goal to increase impact on grantees' organizations, determine whether the Foundation has the capacity to provide closely aligned grantees with larger multi year grants, and/or additional forms of non-monetary assistance.
- Build on existing strong relationships by initiating more frequent, reciprocal contact with grantees, and facilitate smooth transitions between current and outgoing staff.
- Review the selection process to identify areas that could be further streamlined, particularly with an eye towards potentially shortening the internal grant approval process.
- Consider having discussions about plans for assessment with a larger proportion of grantees given the feedback that underscores their value.

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**“I find the most satisfying funder relationships we have happen when there's someone who really understands and cares about our mission and activities and helps us find ways to troubleshoot and succeed.”**

## OUR RESPONSE

The survey findings and comments have sparked lots of great conversations at The Foundation, and we wanted to share what some of our next steps will be.

### **Find New Ways to Learn Out About Community**

While we are glad to see that grantees view The Foundation as having a good understanding of, and impact on, our community, we heard that we need to do more to understand specific fields. Recently, each of our Grants Associates was assigned a portfolio in a specific field that aligns with our Causes. This will allow us to build deeper relationships with the organizations that work within those fields, as well as to learn more about the broader context in which those organizations work. During the next three years of our Strategic Plan, The Winnipeg Foundation is also committed to hosting community conversations on a range of topics; the insights gained from these conversations will allow us to learn more about specific community issues and inform our decision-making.

### **Increase Impact on Community Organizations**

Survey respondents identified a number of ways that The Foundation could increase its impact on their organizations. Suggestions included larger grants, longer grants, more general operating support and more flexibility during grant award and transition.

The Foundation has identified a number of ways to address the request for larger and longer grants. The Foundation's grantmaking priorities for 2019 to 2021 will help identify projects where we can make larger investments, and we are committed to offering Multi-Year Community Grants again, starting in 2020.

The need for stable, ongoing operating support continues to be a challenge for charitable organizations, and The Foundation is continually having conversations about how we can best meet this need. For now, we see Agency Endowment Funds as the best way to provide this consistent funding. Organizations that create an endowment fund benefit from The Foundation's matching program, which helps a fund grow faster. And each year the revenue from the fund goes back to the organization to be used at its discretion. We are exploring other ways to support agency fund holders, particularly in the area of planned giving. At the same time, by offering some longer Community Grant agreements, we hope to address organizations' need for longer term funding, while still maintaining our established role as a project funder. This allows us the flexibility to provide support for new innovative ideas and to respond to changing community needs.

Another suggested area of improvement was more flexibility during grant award and transition periods, particularly around the transition from a One-Time Community Grant to multi-year funding, as well as the timing/frequency of application intakes. This feedback will be taken into consideration as we plan for the next iteration of Multi-Year Community Grants. The Foundation's Grants Team is also a great resource to help organizations strategize and plan their applications.

We also heard that grantees are interested in receiving more non-monetary support, and there were lots of creative ideas. Our current strategic plan identifies strengthening the charitable sector as a key priority for the next three years. This was due in part to what we heard from charitable

organizations as part of the *Stressed, Stretched and Still Standing* report; the responses of the Grantee Perception Report have reinforced our commitment to this work. Some specific steps to strengthen the sector outlined in our strategic plan include, “telling the story of its impact, providing more capacity building grants, and continuing to emphasize our established Agency Fund program.”

Grantees also responded that they would appreciate support from The Foundation to secure other sources of funding, including from Foundation fundholders. We are continuously looking for more ways to connect our donors with community organizations, and pledge to ensure grantees know about these opportunities.

### **Build Stronger Relationships With Community Organizations**

We were also pleased to see grantees have provided high ratings for the quality of their relationships with Foundation staff, however the findings have also challenged some of our assumptions about how best to work with community organizations. We see this as an opportunity for further conversations.

### **Explore New Selection and Reporting Processes**

The feedback on our application, selection and reporting process was mostly positive, but there is certainly room for improvement. We are developing new technology that will further streamline the application and reporting process, and are exploring ways to adapt the application, review and reporting process to the type of funding being requested.

The survey also revealed ideas about how The Foundation could better support grantees in determining how to assess the success of the funded project. We have also identified this as an area of improvement, both as a way to better support grantees as well as to better demonstrate the impact of our grantmaking.

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**“What encourages me most about working with The Winnipeg Foundation is that it does not seem to take a prescriptive approach to granting and instead allows organizations to express their needs and The Foundation tries to support those needs.”**

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**We will continue to have conversations about what we have learned from the Grantee Perception Report. Going forward, we are committed to continuing the practices that have a positive impact on our community partners, while seeking opportunities to improve in the areas identified in the feedback.**



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