

# Key Findings and Recommendations from the Fund for New Jersey 2021 Grantee Perception Report

Prepared by the Center for Effective Philanthropy

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*In September and October of 2021, the Center for Effective Philanthropy conducted a survey of The Fund for New Jersey's (referred to as "The Fund") grantees. The memo below outlines CEP's summary of key strengths, opportunities, and recommendations. Grantee perceptions should be interpreted in light of The Fund's unique goals, strategy, and context.*

*This memo highlights the comprehensive survey results from 34 grantees (a 76% response rate).*

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## Overview

- ▶ CEP previously surveyed the grantees of The Fund for New Jersey in 2011. In 2021, grantee ratings are now very strong – often in the top 30 percent of funders in the dataset – across a variety of themes in the survey.
- ▶ Notably, grantees now rate The Fund significantly more positively for its:
  - Impact on and understanding of their fields and communities,
  - Advancement of knowledge and effect on public policy,
  - Understanding of their organizations,
  - Approachability,
  - Clarity and consistency of communications, and
  - Helpfulness of the selection process.

## Robust Improvements in Perceptions of External Impact

- ▶ Grantees' perceptions of The Fund for New Jersey's work in the field mark some of the largest changes since 2011. Specifically, grantees provide significantly higher ratings than in 2011 – now in the top ten percent of the dataset – for its impact on their fields, placing The Fund near the top of its cohort of peers.
  - The Fund also receives significantly higher ratings – now in the top five percent of the dataset – for its understanding of grantees' fields.

- ▶ Furthermore, grantees view The Fund for New Jersey as having a stronger than typical influence on advancing knowledge in their fields, and their ratings place The Fund among the top three funders of CEP’s dataset for its effect on public policy. Perceptions of both measures are significantly more positive than they were in 2011.
- ▶ These sentiments came through clearly in written responses, with grantees describing The Fund as a “force to be reckoned with,” whose “vision...is often at the cutting edge” because of its ability to anticipate needs and mobilize resources in the field to “form advanced strategy” and “directly contribute to the development of sound policy proposals on pressing issues.”

**STRONG COMMITMENT TO COMMUNITY, UNDERREPRESENTED BENEFICIARIES, AND DIVERSITY, EQUITY, AND INCLUSION**

- ▶ In addition to strong perceptions related to grantees’ fields, ratings for The Fund’s impact on and understanding of grantees’ local communities have significantly increased since 2011 and are now similar to those at the typical funder in CEP’s dataset and its custom cohort.
- ▶ Nearly 70 percent – a typical proportion – of Fund grantees report that their funded work is primarily meant to benefit historically disadvantaged groups – especially African American or Black individuals or communities, Hispanic or Latina, Latino, or Latinx individuals or communities, and people who have experienced and/or are experiencing poverty.
  - Importantly, The Fund for New Jersey also receives ratings that are more positive than the typical funder in the overall dataset and in its cohort of peers for its understanding of the contexts in which grantees work. Grantees provide ratings in the top 10 percent of the dataset for The Fund’s understanding of their beneficiaries’ needs and for the extent to which its funding priorities reflect those needs.
- ▶ More broadly, grantee responses to a series of questions about The Fund’s approach to diversity, equity, and inclusion are also more positive than typical. Specifically, grantees rate The Fund in the top 10 percent of the dataset for their agreement that the staff they have interacted with embody a commitment to DEI and in the top quarter of the dataset for its commitment to and communications about DEI.



*“...We see the Fund as a visionary partner in the fight for justice and equity. [Our work would not be possible without] invest[ment] in our communities...[and] The Fund[s] approach to reach collective effort and facilitate community empowerment is very effective.”*

**Sustained Impact on Grantees’ Organizations & Valuable Non-monetary Support**

- ▶ Ratings for The Fund’s understanding of grantees’ organizations have significantly improved since 2011 – and are now in the top 10 percent of the dataset – to mirror ratings for impact on grantees’ organizations, which continue to be more positive than typical.
  - Grantees see value in The Fund’s focus on their organizations: when asked about the top two roles they believe The Fund for New Jersey should play in the future, the largest proportion (44 percent) of grantees selected, ‘Building organizational capacity’.

- ▶ CEP’s broader research finds that grantmaking characteristics are often related to perceptions of a funder’s impact on grantee organizations, with grants that are relatively large, multi-year and/or for general operating support associated with higher ratings of impact.
  - Compared to 2011, The Fund for New Jersey’s grants tend to be a bit larger, longer, and more unrestricted. While median grant size is similar to that at the typical funder, The Fund’s grants are now longer and much more unrestricted than is typical in CEP’s dataset.
- ▶ CEP’s research also shows that intensive patterns of support beyond the grant check are associated with more positive perceptions of impact on grantees’ organizations. Nearly half of Fund grantees – a typical proportion – report receiving non-monetary support during the grant period.
  - All of these grantees indicate that this support provided at least a minor benefit to their organization or work, and nearly two-thirds of grantees – a larger than typical proportion – indicate that it provided a major benefit.
  - Additionally, when asked in a custom question about the impact of the non-monetary support they received on their ability to achieve their goals, over 60 percent indicate that the support was equally or more important than The Fund’s financial contributions.
- ▶ When asked how The Fund could improve, six grantees – the largest group – encourage the provision of even more non-monetary support, particularly opportunities to collaborate with and learn from other grantees.
  - Over 40 percent – the second largest proportion – of grantees selected, ‘Connecting people and organizations doing similar or complementary work’ when asked about the top two roles The Fund should play in the future.



*“...Resources from The Fund have enabled us to get more heavily involved in issue areas where we may not have had [involvement] and partner with organizations with which we have had little to no relationship.”*

*“Facilitate gatherings among grantees to exchange experiences, resources and opportunities to work together and support each other.”*

## Excellent Relationships and Solid Communications

CEP’s research finds that strong funder-grantee relationships – defined by high quality interactions and clear, consistent communications – are a key predictor of grantees’ perceptions of a funder’s impact.

- ▶ Grantees provide higher than typical ratings across nearly all key measures related to the quality of their interactions with The Fund when compared to the overall dataset, including for Fund staff’s responsiveness, openness, candor about their perspectives on grantees’ work, exhibition of trust in grantees’ staff, and respect for those impacted by the funded work.
  - Ratings for overall transparency are particularly strong, placing The Fund in the top five percent of the dataset.

- Grantees also rate significantly higher than in 2011 – and now similar to grantees at the typical funder – for their comfort approaching The Fund if a problem arises.
- ▶ Relatedly, about 80 percent of grantees report interacting with Fund staff at least once every few months, and a larger than typical proportion of grantees indicate that Fund staff most frequently initiates contact – 31 percent compared to 17 percent at the typical funder.
- ▶ When it comes to communications, grantee perceptions for the clarity of The Fund’s communications about its goals and strategies are significantly more positive compared to 2011, now placing The Fund in line with the typical funder in the overall dataset.
  - Ratings for the consistency of The Fund’s communications are also significantly higher – and now in the top quarter of the dataset – compared to 2011, and grantees also provide higher than typical ratings for their understanding of the way in which their work fits into The Fund’s broader efforts.



*“I can't speak highly enough about the interactions with The Fund. They feel more like a strategy partner than a funder. This relationship allows for transparent problem solving and creative solutions [and] has led to the growth of our impact and our organization.”*



*“... The Fund takes a thoughtful, accessible approach to all interactions and communications, whether initiated by us or The Fund. .... The materials issued by The Fund (news updates, special issue reports), are always high-quality and informative.”*

## Streamlined and Helpful Processes despite Pressure

- ▶ Given that grantees receive larger grants and report spending fewer hours than is typical (22 hours) on grant requirements compared to 2011, Fund grantees now receive a typical amount of grant money for every hour they spend on Fund-required processes.
  - In addition to this streamlining, processes are also more timely and rapid: 81 percent of grantees (compared to only 68 percent in 2011) report waiting less than 3 months between proposal submission and clear commitment of funding.
- ▶ Furthermore, despite a significant decline in the proportion of grantees who report discussing plans for assessment with the Fund, experiences with processes have generally improved:
  - Ratings for the helpfulness of The Fund’s selection process have significantly increased since 2011 and are now more positive than typical.
  - When it comes to The Fund’s reporting process, perceptions of its straightforwardness, adaptability, and relevance are higher than typical, and ratings for its helpfulness place The Fund in the top 15 percent of the overall dataset and above the typical funder in its peer cohort.
- ▶ Grantees report experiencing more pressure than grantees at the typical funder – and more than in 2011 – to modify their organization’s priorities in order to receive funding, making the Fund the highest-pressure funder in its custom cohort.

- Echoing CEP’s broader research associating pressure and relationships, Fund grantees who report experiencing the most pressure (rating a three or higher on a 7-point scale) provide significantly lower ratings for their comfort approaching The Fund if a problem arises, its openness to their ideas and its trust in their organization’s staff, and its understanding of their communities and beneficiaries. Environmental grantees, in particular, report experiencing a very high level of pressure.
- Interestingly, across all four open-ended survey questions, grantees do not directly address pressure in their written responses, and they rarely provide constructive comments when asked about the quality of The Fund’s processes, interactions, and communications. When looking specifically at grantee suggestions, those who report experiencing the most pressure most frequently request revisions to The Fund’s processes, an increase in funding, and more active demonstrations of “what The Fund views as some specific needs and actions that they believe to be most pressing in terms of racial equity”.



*“The Fund’s process...is clear and not overburdensome, unlike other foundations. We really appreciate this!”*



*“I felt like the grant writing and grant reporting processes were clear, concise and straightforward. When I had a question or an issue, The Fund responded in a timely and helpful manner.”*

## Recommendations

Based on its grantee feedback, CEP recommends that The Fund for New Jersey consider the following in order to build on its strengths and address potential areas for improvement:

- ▶ Celebrate the significantly improved ratings for impact on grantees’ fields and communities, and ensure that the values, approaches, and practices that have contributed to these positive perceptions are embedded at The Fund.
- ▶ Given grantee feedback about the importance and value of The Fund’s role in strengthening their organizations, continue to grow its provision of non-monetary support, especially opportunities to facilitate learning across grantees through collaboration or convenings.
  - Also, maintain open lines of communications to ensure grantees consistently have opportunities to share the types of assistance their organizations most need.
- ▶ To further strengthen The Fund’s communications and interactions characterized by responsiveness, openness, transparency, and trust, facilitate internal conversations about how to maintain strong impact while mitigating the growing level of pressure grantees experience to change their organizational priorities.
- ▶ Considering positive feedback on the Fund’s processes, reflect on the changes that have been made to processes since 2011 and in response to external contexts, and discuss which of these shifts The Fund may consider making permanent elements of practice.