GRANTEE PERCEPTION REPORT

Prepared for
The Healing Trust
May 2019

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THE CENTER FOR
EFFECTIVE PHILANTHROPY

About CEP

The **mission of the Center for Effective Philanthropy** is to provide data and create insight so philanthropic funders can better define, assess, and improve their effectiveness – and, as a result, their intended impact.

About the GPR

The Grantee Perception Report® (GPR) provides funders with candid feedback and insights based on responses to an easy-to-implement online grantee survey. The GPR is the most widely used grantee survey, and it's driven by extensive research and analysis. Hundreds of funders have used the GPR and its comparative data to make the best choices about how to use their resources to create impact.

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Grantee Survey Population

Survey Fielded	Year of Active Grants	Responses Received	Response Rate
February and March 2019	2018	60	65%
February and March 2015	2014	95	79%

Program	Number of Responses
Healing from Abuse, Neglect and Violence	19
Mental Health	14
Physical Health	21
Recovery from Alcohol and Drug Abuse	6

Type-Status	Number of Responses
Advocacy Grants	13
Cultures of Compassion and Sabbatical Grants	5
Operating Grants	16
Small Grant	9
Transom Grants	17

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Grantee Comparative Dataset

Nearly 300 foundations

More than 40,000 grantee responses

Custom Cohort	
Benwood Foundation	Richmond Memorial Health Foundation
Blue Cross and Blue Shield of North Carolina Foundation	The Assisi Foundation of Memphis, Inc.
Charlottesville Area Community Foundation	The Cameron Foundation
Danville Regional Foundation	The Children's Trust
Episcopal Health Foundation	The Healing Trust
Eugene and Agnes E. Meyer Foundation	The Zeist Foundation
Mary Reynolds Babcock Foundation	Williamsburg Health Foundation
Paso del Norte Health Foundation	Wiregrass Foundation
Quantum Foundation	

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"What is one word that best describes The Trust?"

Resource Informed Openness Impactful Thorough Faithful Fantastic Dedicated Facilitator Solid Responsive Invested Lifesaving Compassion Understanding Engaged Outstanding Needed Community-Oriented Philanthropic Generous Mindful Compassionate Cautious Accountability Essential Intentional Supportive Partner Caring Helpful Community-Focused Camaraderie Healing Innovative Supporter Collaborative Committed

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FUNDER-GRANTEE RELATIONSHIPS

Funder-Grantee Relationships

INTERACTIONS

Fairness of treatment by foundation

Comfort approaching foundation if a problem arises

Responsiveness of foundation staff
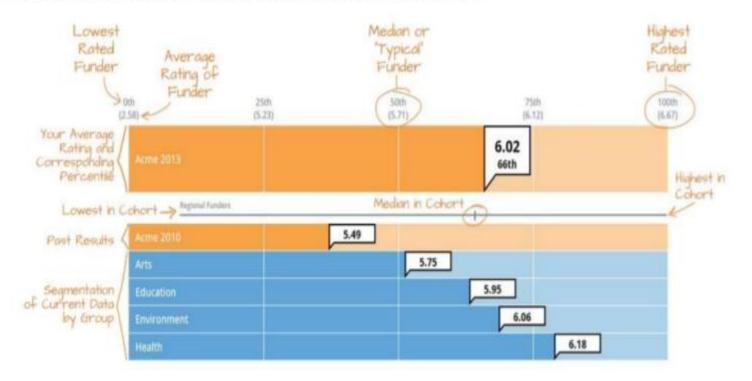
COMMUNICATIONS

Clarity of communication of foundation's goals and strategy

Consistency of information provided by different communications
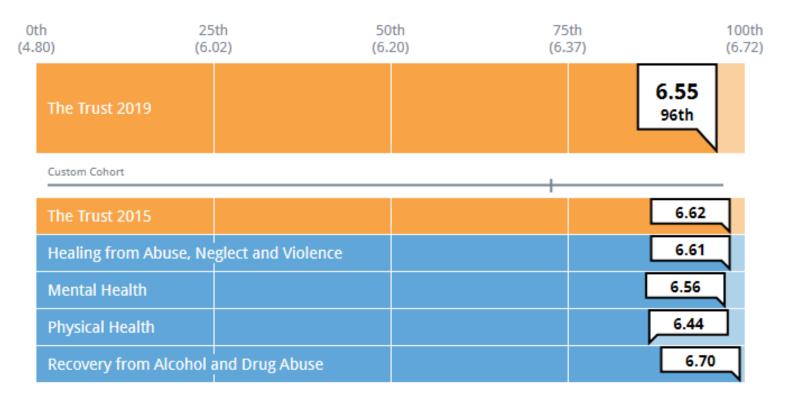
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Interpreting Your Charts

Many of the charts in this report are shown in this format. See below for an explanation of the chart elements.
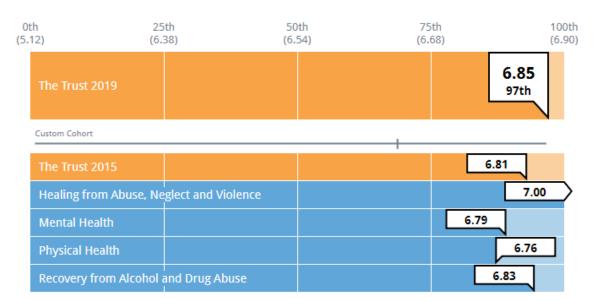
Funder-Grantee Relationships
Summary Measure
1 = Very negative, 7 = Very positive

"Overall, how fairly did The Trust treat you?"
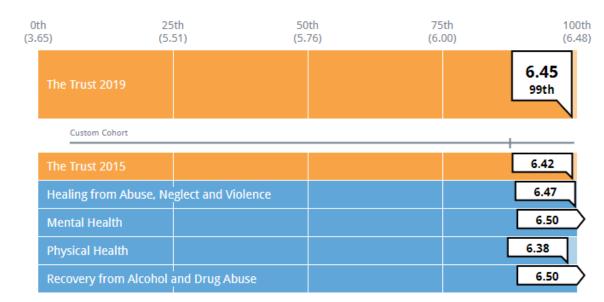
1 = Not at all fairly
7 = Extremely fairly

	0th (5.12)	25th (6.38)	50th (6.54)	75th (6.68)	100th (6.90)
The Trust 2019					6.85 97th
Custom Cohort					
The Trust 2015				6.81	
Healing from Abuse, Neglect and Violence					7.00
Mental Health				6.79	
Physical Health				6.76	
Recovery from Alcohol and Drug Abuse				6.83	

"Overall, how responsive was Trust staff?"

1 = Not at all responsive
7 = Extremely responsive

	0th (4.90)	25th (6.11)	50th (6.37)	75th (6.58)	100th (6.93)
The Trust 2019					6.67* 88th
Custom Cohort					
The Trust 2015					6.88
Healing from Abuse, Neglect and Violence				6.74	
Mental Health				6.57	
Physical Health				6.62	
Recovery from Alcohol and Drug Abuse				6.83	

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"How clearly has The Trust communicated its goals and strategy to you?"
1 = Not at all clearly
7 = Extremely clearly

0th (3.65)	25th (5.51)	50th (5.76)	75th (6.00)	100th (6.48)

The Trust 2019 — 6.45 99th

Custom Cohort

The Trust 2015 — 6.42
Healing from Abuse, Neglect and Violence — 6.47
Mental Health — 6.50
Physical Health — 6.38
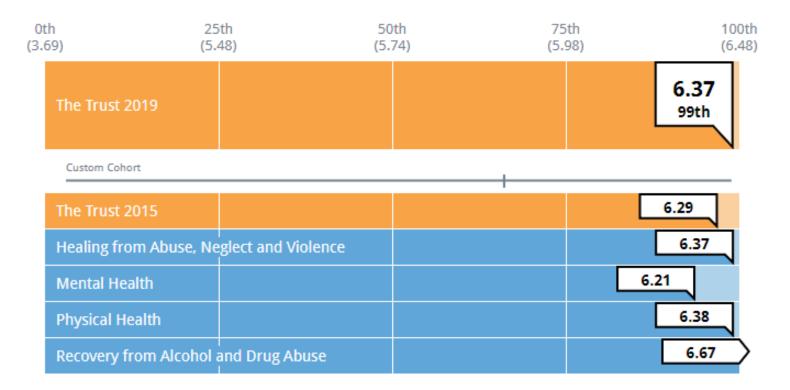Recovery from Alcohol and Drug Abuse — 6.50

"How consistent was the information provided by different communication resources, both personal and written, that you used to learn about The Trust?"
1 = Not at all consistent
7 = Extremely consistent

0th (3.89)	25th (5.79)	50th (6.02)	75th (6.21)	100th (6.69)

The Trust 2019 — 6.27 81st

Custom Cohort

The Trust 2015 — 6.48
Healing from Abuse, Neglect and Violence — 6.37
Mental Health — 6.29
Physical Health — 6.14
Recovery from Alcohol and Drug Abuse — 6.33

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"Overall, how transparent is The Trust with your organization?"

1 = Not at all transparent, 7 = Extremely transparent

"The Healing Trust staff are like light on the path. They are real, responsive and professional. They are in touch with the needs of the community and are deeply engaged in work group level advocacy. They model authenticity and vulnerability. They encourage grantees to be open and honest about struggles and victories. They are creative and generous with their resources and their facility."
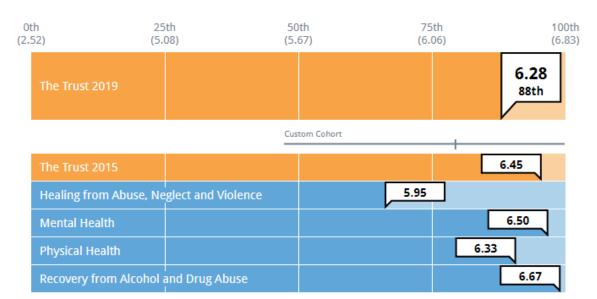
"The Trust leadership and staff are incredibly helpful and supportive. They are by far, the most transparent and flexible of the grantors I work with. They are outstanding and dependable partners. We are so much better as an organization because of the Trust's leadership and support."

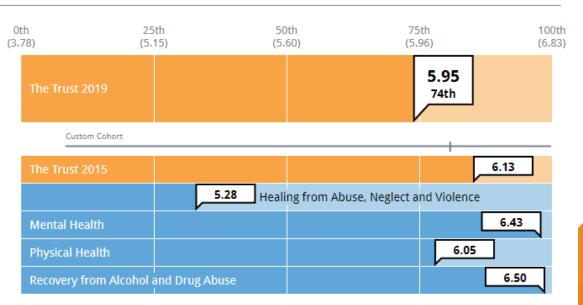CEP

COMMUNITY AND FIELD LEADERSHIP

"Overall, how would you rate The Trust's impact on your local community?"

1 = No impact
7 = Significant positive impact

	0th (2.52)	25th (5.08)	50th (5.67)	75th (6.06)	100th (6.83)
The Trust 2019					**6.28** 88th

Custom Cohort

The Trust 2015					6.45
Healing from Abuse, Neglect and Violence				5.95	
Mental Health					6.50
Physical Health				6.33	
Recovery from Alcohol and Drug Abuse					6.67

"How well does The Trust understand the local community in which you work?"

1 = Limited understanding of the community
7 = Regarded as an expert on the community

	0th (3.78)	25th (5.15)	50th (5.60)	75th (5.96)	100th (6.83)
The Trust 2019				**5.95** 74th	

Custom Cohort

The Trust 2015					6.13
Healing from Abuse, Neglect and Violence		5.28			
Mental Health					6.43
Physical Health				6.05	
Recovery from Alcohol and Drug Abuse					6.50

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"Overall, how would you rate The Trust's impact on your field?"

1 = No impact
7 = Significant positive impact

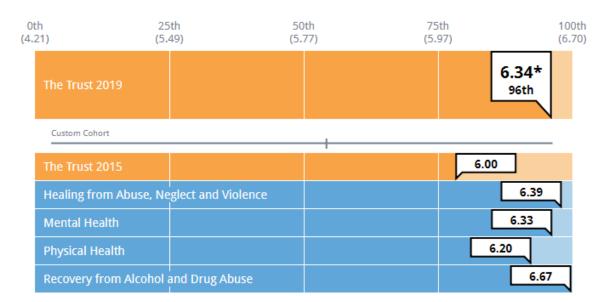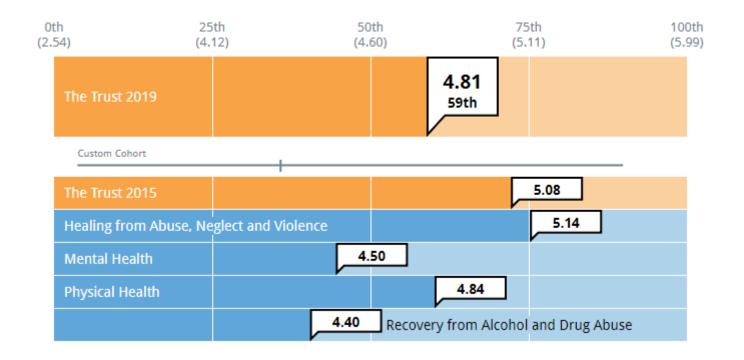|	0th (4.21)	25th (5.49)	50th (5.77)	75th (5.97)	100th (6.70)
The Trust 2019					6.34* 96th
Custom Cohort					
The Trust 2015				6.00	
Healing from Abuse, Neglect and Violence					6.39
Mental Health					6.33
Physical Health				6.20	
Recovery from Alcohol and Drug Abuse					6.67

"How well does The Trust understand the field in which you work?"

1 = Limited understanding of the field
7 = Regarded as an expert in the field

	0th (4.60)	25th (5.46)	50th (5.70)	75th (5.93)	100th (6.56)
The Trust 2019			5.76 57th		
Custom Cohort					
The Trust 2015				5.86	
Healing from Abuse, Neglect and Violence				5.94	
Mental Health		5.62			
Physical Health			5.71		
Recovery from Alcohol and Drug Abuse		5.67			

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"To what extent has The Trust affected public policy in your field?"

1 = Not at all, 7 = Major influence on shaping public policy

"What really stands out…is The Trust's strategic entry into advocacy and investing staff time in working collaboratively with nonprofit leaders around collective impact."

> *"Their decision to fund advocacy was such an act of leadership and vision for Tennessee. It can often be demoralizing and detrimental to often hear from foundations who know that long term systems change is important, but they feel it's best if they stay in their own lane and not tackle the bigger issue. The Trust made a bold leap and it has been incredibly worthwhile, transformative, and beneficial in the eyes of their grantees."*
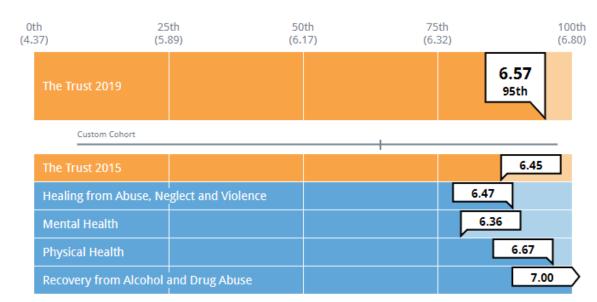
> *"The Trust continues to be a thought and action leader in [our] field. They are often cited by other agencies regarding the impact of work and resources provided. In addition, they are always available for any type of questions."*

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IMPACT ON GRANTEE ORGANIZATIONS

"Overall, how would you rate The Trust's impact on your organization?"
1 = No impact
7 = Significant Positive Impact

	0th (4.37)	25th (5.89)	50th (6.17)	75th (6.32)	100th (6.80)
The Trust 2019					6.57 / 95th

Custom Cohort

The Trust 2015					6.45
Healing from Abuse, Neglect and Violence					6.47
Mental Health					6.36
Physical Health					6.67
Recovery from Alcohol and Drug Abuse					7.00

"How well does The Trust understand your organization's strategy and goals?"
1 = Limited understanding
7 = Thorough understanding

	0th (3.69)	25th (5.58)	50th (5.80)	75th (6.00)	100th (6.60)
The Trust 2019				6.00* / 75th	

Custom Cohort

The Trust 2015					6.28
Healing from Abuse, Neglect and Violence					6.05
Mental Health				5.93	
Physical Health				5.90	
Recovery from Alcohol and Drug Abuse					6.33

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"How aware is The Trust of the challenges that your organization is facing?"

1 = Not at all aware
7 = Extremely aware

	0th (4.00)	25th (5.05)	50th (5.30)	75th (5.52)	100th (6.29)
The Trust 2019					5.77 / 92nd

Custom Cohort

The Trust 2015					5.64
Healing from Abuse, Neglect and Violence					6.16
Mental Health		5.29			
Physical Health					5.62
Recovery from Alcohol and Drug Abuse					6.17

"How well does The Trust understand the social, cultural, or socioeconomic factors that affect your work?"

1 = Limited understanding
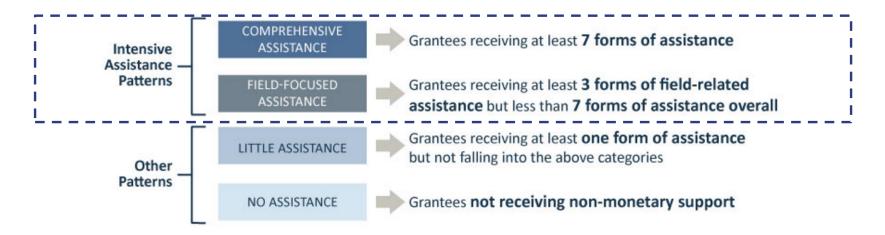*7 = Thorough understanding*

	0th (4.24)	25th (5.45)	50th (5.70)	75th (5.90)	100th (6.58)
The Trust 2019					6.12 / 93rd

Custom Cohort

The Trust 2015					6.01
Healing from Abuse, Neglect and Violence					6.26
Mental Health			5.79		
Physical Health					6.24
Recovery from Alcohol and Drug Abuse					6.00

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Non-Monetary Support

Management Assistance	Field-Related Assistance	Other Assistance
General management advice	Encouraged/facilitated collaboration	Board development/ governance assistance
Strategic planning advice	Insight and advice on your field	Information technology assistance
Financial planning/accounting	Introductions to leaders in field	Communications/marketing/ publicity assistance
Development of performance measures	Provided research or best practices	Use of Foundation facilities
	Provided seminars/ forums/convenings	Staff/management training

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Proportion of Grantees That Received Field-Focused or Comprehensive Assistance

Intensive Assistance Patterns	COMPREHENSIVE ASSISTANCE	Grantees receiving at least **7 forms of assistance**
	FIELD-FOCUSED ASSISTANCE	Grantees receiving at least **3 forms of field-related assistance** but less than **7 forms of assistance overall**
Other Patterns	LITTLE ASSISTANCE	Grantees receiving at least **one form of assistance** but not falling into the above categories
	NO ASSISTANCE	Grantees **not receiving non-monetary support**

Non-Monetary Assistance Patterns	The Trust 2019	The Trust 2015	Average Funder	Custom Cohort
Comprehensive	15%	11%	7%	10%
Field-focused	5%	6%	11%	9%
Little	67%	61%	40%	44%
None	13%	22%	42%	37%

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"*The Staff are willing to work with you for success. They are truly committed to supporting the organizations they fund and it really is about an investment for them. Their priority is really about setting organizations up for success and ensuring that their investment is creating that impact and change.*"
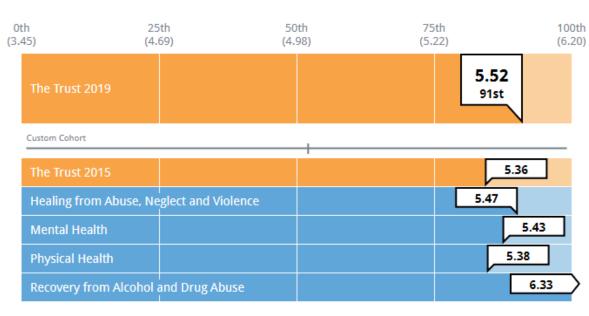
"*The Trust has been very helpful in our ability to provide the financial checks and balances we needed as an organization…. [The] grant writing workshop and financial workshop have fundamentally changed our approach to the statement of need and how to prove our effectiveness in meeting it.*"
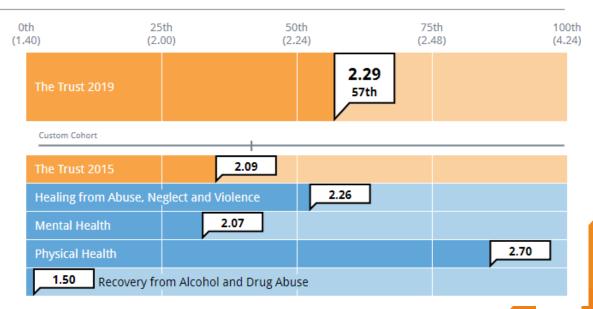
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GRANTMAKING PROCESSES

"How helpful was participating in The Trust's selection process in strengthening the organization/ program funded by the grant?"

1 = Not at all helpful
7 = Extremely helpful

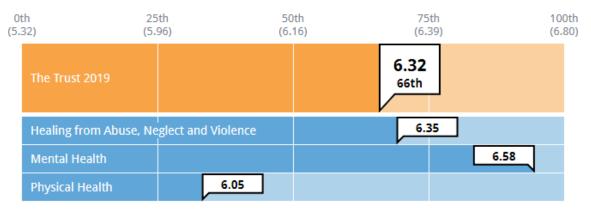|	0th (3.45)	25th (4.69)	50th (4.98)	75th (5.22)	100th (6.20)
The Trust 2019					5.52 / 91st
Custom Cohort					
The Trust 2015					5.36
Healing from Abuse, Neglect and Violence					5.47
Mental Health					5.43
Physical Health					5.38
Recovery from Alcohol and Drug Abuse					6.33

"As you developed your grant proposal, how much pressure did you feel to modify your organization's priorities in order to create a grant proposal that was likely to receive funding?"

1 = No pressure
7 = Significant pressure

	0th (1.40)	25th (2.00)	50th (2.24)	75th (2.48)	100th (4.24)
The Trust 2019			2.29 / 57th		
Custom Cohort					
The Trust 2015		2.09			
Healing from Abuse, Neglect and Violence			2.26		
Mental Health		2.07			
Physical Health					2.70
1.50 Recovery from Alcohol and Drug Abuse					

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"To what extent was The Trust's reporting process straightforward?"

1 = Not at all
7 = To a great extent

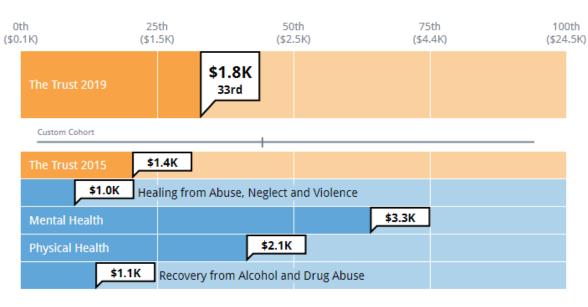|	0th (5.32)	25th (5.96)	50th (6.16)	75th (6.39)	100th (6.80)
The Trust 2019				6.32 66th	
Healing from Abuse, Neglect and Violence				6.35	
Mental Health					6.58
Physical Health		6.05			

"To what extent was The Trust's reporting process relevant, with questions and measures pertinent to the work funded by this grant?"

1 = Not at all
7 = To a great extent

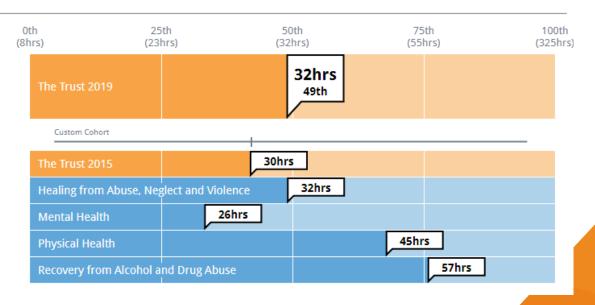|	0th (5.17)	25th (5.92)	50th (6.10)	75th (6.26)	100th (6.65)
The Trust 2019					6.37 85th
Healing from Abuse, Neglect and Violence					6.53
Mental Health					6.58
Physical Health		6.05			

Dollar Return: Median grant dollars awarded per process hour required

Includes total grant dollars awarded and total time necessary to fulfill the requirements over the lifetime of the grant.

	0th ($0.1K)	25th ($1.5K)	50th ($2.5K)	75th ($4.4K)	100th ($24.5K)
The Trust 2019		$1.8K 33rd			

Custom Cohort

The Trust 2015	$1.4K
	$1.0K Healing from Abuse, Neglect and Violence
Mental Health	$3.3K
Physical Health	$2.1K
	$1.1K Recovery from Alcohol and Drug Abuse

Median hours spent by grantees on funder requirements over grant lifetime

	0th (8hrs)	25th (23hrs)	50th (32hrs)	75th (55hrs)	100th (325hrs)
The Trust 2019		32hrs 49th			

Custom Cohort

The Trust 2015	30hrs
Healing from Abuse, Neglect and Violence	32hrs
Mental Health	26hrs
Physical Health	45hrs
Recovery from Alcohol and Drug Abuse	57hrs

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"It was so helpful to have technical assistance throughout the entire grant process so that we could craft the strongest proposal possible…. There is just no other grant process like it - to have someone answer questions, provide technical assistance, etc. is so helpful. The same has been true for the reporting process as well. The staff are always available to help us out…. Working with the Healing Trust is never stressful - it is hard work to craft a strong proposal and expectations are high, but they are tempered with a sense of realism not seen by other funders."

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RECOMMENDATIONS

Recommendations

‣ Across this Grantee Perception Report, The Trust receives exceptionally positive ratings on many measures. Celebrate and reflect on the practices, policies, and **elements of The Trust's culture that contribute to exceptionally strong ratings** throughout this report.

‣ Recognizing the time of the change at The Trust, reflect on ways to **ensure that grantees continue to receive consistent, responsive communication** throughout their application and grant periods.

‣ Consider providing **additional non-monetary assistance to grantees**, particularly in areas indicated by grantees as key organizational challenges for which they want more support from The Trust.

‣ Seek additional areas to provide **highly-valued staff support** during the application, reporting, and evaluation processes. Where possible, address grantees' concern regarding the clarity of the information required and expectations of desired outcomes.

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Thank You.