

Learning and improving from the Grantee Perception Report



Two years ago, we partnered with the Center for Effective Philanthropy (CEP) to conduct a confidential survey of Foundation grant partners. Since then, we've been on a journey of learning and improvement informed by the survey results, and we're reaching out now to update you on our work.

Survey results

Through the survey, we learned that we have both areas of strength and opportunities for improvement when compared to our peer funders.

Some areas where grantees felt we were strongest included our influence on public policy and partnership on systems change efforts, the size and duration of our grants, and the support we offer grantees beyond our funding. Grantees reported positive experiences across multiple areas when engaging in our learning and evaluation work, and shared that our administrative requirements seemed appropriate given our commitment to larger, multi-year grants.

We also learned areas we could improve. For example, grantees said they would benefit from more communication and connection with the Foundation and a stronger mutual understanding of organizational goals and priorities between the Foundation and grantees. Grantees also highlighted that more evaluation and learning support would be beneficial.

Acting on our learning

When we launched the grantee survey, we had just completed a year-long strategic refinement process and were adjusting to new ways of working during the global pandemic. The survey results helped us better understand where we should prioritize as we embarked on a new chapter.

In response to feedback about where we could improve, we:

- Updated our website to reflect our new strategic plan more clearly.
- Revamped our newsletter to center the work of grantees and partners in the field.
- Increased investments in our communications and evaluation and data strategies teams to support grantees.
- Invested in equity-centered evaluation and learning practices that involved grantees and people with lived experience more explicitly.
- Created more opportunities for learning from and with grantees, both virtually and in-person.
- Increased our commitment to diversity, equity, and inclusion as a core value driving our work.
- Recruited new trustees to our Board with greater lived experience and community leadership.

In addition, we doubled down on practices grantees told us were foundation strengths. For example, we continue to prioritize multi-year funding and larger-than-average grants even as our grantmaking budget has reduced and forced us to make challenging across the board reductions. We continue to prioritize influencing policy and systems change. And, we changed our financial due diligence requirements, eliminating significant documentation steps for existing grantees with smaller budgets.

Continuing to learn

All our efforts are works in progress, and we know there are ways we can continue to improve. We are so grateful for our partnership with your organization and the many ways we learn from you, both formally through surveys like the one we launched two years ago with CEP, and informally through our regular conversations and connections.

We look forward to launching another grantee survey next year. Until then we welcome your feedback, insights, and suggestions for how we can be a better and more meaningful partner in our collective efforts to make California the healthiest state and end domestic violence.

With appreciation on behalf of the full Foundation team,

Debbie I. Chang

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