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Key Findings and Recommendations from the F.M. Kirby Foundation 2022 Grantee Perception Report

Prepared by the Center for Effective Philanthropy

In February and March of 2022, the Center for Effective Philanthropy (CEP) conducted a survey of the F.M. Kirby Foundation’s (“the Foundation”) grantees, achieving an 82 percent response rate. The memo below outlines the key findings and recommendations from the Foundation’s Grantee Perception Report (GPR). Grantee perceptions should be interpreted in light of the Foundation’s goals, strategy, and context, as well as the major global and local disruptions preceding and continuing through the survey period.

This memo accompanies the comprehensive survey results found in the Foundation’s interactive online report at <https://cep.surveymaterials.org> and in the downloadable online materials. The Foundation’s full report also contains more information about survey analysis and methodology.

Overview

CEP previously surveyed grantees of the F.M. Kirby Foundation in 2003 and 2012. In 2022, F.M. Kirby Foundation’s grantees hold positive perceptions of the Foundation that are largely consistent with or more positive than those in 2012, and often similar to or higher than the typical funder in CEP’s dataset. In particular, grantee ratings place the Foundation in the top quarter of CEP’s overall dataset for perceptions of its approachability and understanding of grantee organizations’ strategy and goals.

In comments, many grantees express appreciation for the understanding and partnership of staff. In their suggestions for improvement, the largest proportions of grantees focus on more opportunities for interaction and communication about the Foundation’s work, encouraging the Foundation to engage with grantees more frequently and in person, and more clearly articulating its strategy and priorities.

On many measures throughout this report, grantees’ ratings vary based on their program area and geographical area served. The full breakdown of ratings by these characteristics can be found in the Foundation’s online report.

Outstanding Impact on Grantees' Organizations

Foundations may impact their grantees' organizations through direct grantmaking, non-monetary support, and funders' perceived understanding of their grantees' work, contexts, and challenges. Similar to 2012, grantees rate F.M. Kirby Foundation's impact on their organizations higher than the typical funder. Grantee ratings also place the Foundation in the top 20 percent of CEP's overall dataset for its awareness of grantees' challenges and understanding of grantee organizations' goals and strategy.

Smaller and Shorter Grants, More Flexible Funding

- ▶ CEP's broader research has shown that grant characteristics – specifically size, length, and whether the grant was restricted – are often meaningful predictors of perceptions of impact on grantee organizations, with multi-year unrestricted support being a particularly powerful contribution. Overall, F.M. Kirby Foundation provides smaller grants (\$40K at the median) and fewer multi-year grants (14 percent of grantees report grants of two or more years) than the typical funder in CEP's dataset. This places the Foundation at the bottom of its custom cohort for both measures.
 - Grantees who report receiving grants of \$40K or more provide significantly higher ratings on many measures in the report, including their perceptions of the Foundation's impact on and understanding of their organizations.
 - Notably, despite a lower percentage that have received multi-year grants, 86 percent of grantees – a higher than typical proportion – have received consistent funding in the past from the Foundation.
 - In their suggestions for improvement, seven grantees mention “the concept of a multi-year grant” as it “would be helpful to our organization as we plan future initiatives.”
- ▶ Nearly 60 percent of grantees – a proportion higher than at most funders in CEP's dataset – report receiving unrestricted funding. A typical proportion of the Foundation's grantees (8 percent) receive multi-year, unrestricted funding.

Interest in Organizational Capacity Building Support

- ▶ In a custom question about which capacity building resources grantees would use if offered by the Foundation, the largest proportion of grantees selected “impact measurement” (69 percent), followed by “leadership development/coaching” (54 percent) and “strategic planning” (54 percent).



“The unrestricted, immediate-impact nature of the Foundation's support is unusual. I see this type of support as exhibiting an advanced understanding of philanthropy as well as setting the tone for other foundations and individual donors.”



“There is no question that the Kirby Foundation's long-time, consistent, strong support has played a major role in our evolution as an institution, and has had a huge influence and share in all that we've achieved.”

Strong Perceptions of Community and Field Impact, with Requests for Stakeholder Convening

The F.M. Kirby Foundation is rated higher than the typical funder in CEP's overall dataset for its impact on and understanding of grantees' local communities. Grantee ratings are typical for the Foundation's impact on and understanding of grantees' fields.

- ▶ In their open-ended comments, grantees highlight the Foundation's commitment to making a difference in their communities and fields, sharing that "their impact is visible and felt in many ways in the community" and "the Foundation understands...how their funding supports positive outcomes in the field we work in."
- ▶ Grantees also provide higher than typical ratings for the Foundation's understanding of the needs of those whom they seek to serve and the extent to which its funding priorities reflect this understanding.

Potential to Offer Valuable Non-Monetary Support to More Grantees

- ▶ Eleven percent of F.M. Kirby Foundation's grantees – compared to 40 percent at the average funder – report receiving non-monetary support from the Foundation.
 - This support is impactful – grantees who received non-monetary support from the Foundation provide significantly more positive ratings on several key measures throughout the report, including the Foundation's impact on grantees' organizations and communities, advancement of knowledge in grantees' fields, and openness to ideas from grantees.
- ▶ When asked in a custom question about the most important roles the Foundation can play beyond grantmaking in the future, the highest proportion of grantees selected "connecting people and organizations doing similar or complementary work" (54 percent) and "convening stakeholders in the nonprofit, public, and private sectors" (52 percent).
- ▶ In their written comments, several grantees mention a desire for connecting with other nonprofits to build their communities and fields. One grantee suggests, "offer up networking opportunities with like-minded organizations for potential collaborative efforts."



"The Foundation is a known and respected leader in the New Jersey community and beyond. Their commitment to continued support for organizations over an extended period of time has helped them to create a sustained legacy in several key philanthropic areas."



"The Foundation holds a great deal of respect within our local community and has the ability to bring folks together to tackle issues, though I have not seen that happen in recent times."

Opportunity to Further Clarify Grantees' Fit in the Foundation's Work

The F.M. Kirby Foundation has an opportunity to improve its messaging of goals, strategies, and funding approaches, enabling grantees to understand and assess their fit into the Foundation's broader work.

- ▶ Ratings for the clarity with which the Foundation has communicated its goals and strategy are significantly more positive than in 2012 and are in line with the typical funder in CEP's comparative dataset. Relatedly, grantee ratings for transparency and the consistency of the information provided by the Foundation's communication resources are higher than typical.
- ▶ However, grantees rate the Foundation lower than typical for their understanding of how their work fits into the Foundation's broader efforts. This may indicate opportunities to strengthen communications, even in light of the positive ratings the Foundation received.
 - In their open-ended comments, one of the most frequently mentioned themes in grantee suggestions relates to the clarity of the Foundation's communications about its work. Grantees share that they "have only a limited understanding of the Foundation's priorities and how they are set," and call for "increased clarity surrounding Foundation priorities and how our organization is integrated to meet these goals."
- ▶ A disconnect in grantees' understanding of the Foundation's strategy and goals is also present in survey measures related to diversity, equity, and inclusion (DEI). Grantees agree less strongly than typical that the Foundation demonstrates an explicit commitment to DEI and has clearly communicated what DEI means for its work. One grantee recommends that the Foundation "make its commitment to diversity, equity & inclusion and anti-racism (and its own journey in this area) more explicit and visible."



"I would be interested in a newsletter sharing information on who was funded, what for, and in what areas to get insights into what types of projects or programs the Foundation is most interested in. I might learn of an area that we work in, but didn't know to bring forward to them."

High Quality Relationships with Opportunities for More Meaningful Connections

On several survey measures relating to relationships between grantees and Foundation staff, ratings are higher than the typical funder in CEP's comparative dataset. Grantees overwhelmingly express gratitude for interactions with F.M. Kirby Foundation staff in their written comments, referring to them as "extremely supportive, accessible, and easy to work with," and state that "the staff and leadership of the F.M. Kirby Foundation exemplify integrity in philanthropy." Still, some opportunities may exist to ensure that stellar relationships with staff are accessible to all grantees.

- ▶ Grantees' ratings are higher than most funders in CEP's dataset for two survey measures relating to trust-based philanthropy: the extent to which the Foundation exhibited trust in grantees' staff and compassion for those affected by grantees' work.
- ▶ Perceptions are significantly more positive than in 2012 for the Foundation's approachability and responsiveness – with grantee ratings placing the Foundation in the top quarter of CEP's dataset for both measures.

- ▶ Of note, grantee experience does not seem to be negatively impacted by recent staff turnover at the Foundation. Despite a higher than typical proportion of grantees (31 percent) reporting a change in their main contact, these grantees do not rate consistently differently than those who did not experience a contact change.

Even More Positive Perceptions Based on More Frequent Interactions and Site Visits

- ▶ Seventy-two percent of grantees report having contact with their program officers at least every few months, and 40 percent of grantees indicate they have exchanged ideas with the Foundation about how their funded work would be assessed.
 - Importantly, grantees who have had these touchpoints provide significantly higher ratings than those who do not for most measures in the report, including aspects of relationships and communications.
- ▶ Another meaningful touchpoint with Foundation staff for grantees is site visits. A quarter of grantees report that Foundation staff visited them in person, 18 percent reported a virtual visit, and 57 percent indicated they did not receive any staff visit during the grant.
 - Grantees who received at least one type of site visit (in person or virtually) provided significantly higher ratings on many measures throughout the survey, including nearly all relationship and communication measures.
 - For example, New Jersey – Morris County grantees are significantly more likely to have received a staff visit in person than grantees in other geographical areas served, and provide significantly more positive ratings on most measures throughout the report. In contrast, Public Affairs/Society Benefit grantees are significantly less likely to have received a staff visit in person compared to grantees in other program areas, and provide significantly lower ratings for many measures in the report, including approachability and clarity of communications.
- ▶ Thirty-one percent of grantee suggestions relate to building even better relationships. Grantees recommend “more regular and open-ended conversations,” and “proactively requesting site visits, or at least phone meetings, with grantees at least once a year to check in and update regarding both the Foundation and the grantee.”



“More than their giving, their approachability, directness and willingness to engage in conversation about individual and shared goals, transforms the way we think and work toward advancing our collective missions. We are stronger together and the Foundation is a true partner in every sense of the word.”



“The staff is approachable and quick to respond to e-mails or calls. They are also accessible and welcome personal visits (in-person or virtually). They work to develop relationships with key staff of the organizations they fund...”

Positive Perceptions of Current Grantmaking Processes

Overall, grantees feel positively towards the Foundation’s grantmaking processes, from the application, reporting, to evaluation stages of the grant cycle. Perceptions of the application process are more positive than the typical funder for the extent to which it was a helpful opportunity to strengthen the

efforts funded by the grant. Grantees also rate the reporting process as more straightforward and adaptable than typical – placing the Foundation near the top ten percent of CEP’s overall dataset for these measures.

- ▶ Compared to nearly all funders in CEP’s dataset, the Foundation’s grantees report feeling a lower amount of pressure to modify their organization’s priorities in order to create a grant application that was likely to receive funding.
 - According to CEP’s research, lower pressure experienced by grantees is associated with more positive perceptions of their funder’s interactions and communications. This finding holds true in F.M. Kirby Foundation’s data, with grantees that experience less pressure providing significantly higher ratings on most measures in the report.
- ▶ In addition to being low pressure, the Foundation’s processes are relatively streamlined, with grantees reporting a lower than typical amount of time spent on funder requirements over the grant lifetime – 13 hours at the median.
 - Grantees also strongly agree that the Foundation’s application process was an appropriate level of effort given the amount of funding received, and that the Foundation was clear about application process requirements and timelines.
- ▶ In response to a series of custom statements about the Foundation’s application and reporting processes, grantees overwhelmingly agree that the processes are clear, flexible, and easy to navigate, and that Foundation staff are helpful with any questions about the application requirements and processes.
 - Notably, grantees are not in widespread agreement that they would prefer an online application portal to the Foundation’s current system – about a quarter of grantees actively disagree with changing the current system and nearly 40 percent neither agree nor disagree with a potential change. This poses an opportunity to collect more feedback from grantees about their perceptions of the advantages and disadvantages of an online application portal compared to the Foundation’s current process.



“They are a bit more flexible and personal in what they require for the application and reporting process than most organizations, and we find that a welcome relief. It indicates the kind of committed relationship they foster and encourage with those they support.”



“The Foundation’s processes and communications are simple and efficient. The simplicity is greatly appreciated given how onerous the application and reporting process can be with other grantors.”

CEP Recommendations

Based on its grantee feedback, CEP recommends that the F.M. Kirby Foundation consider the following in order to build on its strengths and address potential areas for improvement:

- ▶ Recognizing the Foundation's strong impact on and understanding of grantees' organizations, consider which aspects of its values, behaviors, and approaches have contributed to these strong perceptions and reinforce these strengths over time.
 - Continue to provide a high proportion of grantees with unrestricted funding, and consider multi-year grants especially for grantees who are already receiving consistent year-over-year funding from the Foundation.
- ▶ Recognize and celebrate the Foundation's strong impact within its target communities and fields, while continuing to identify additional opportunities for support such as convening organizations and stakeholders.
- ▶ Consider the Foundation's capacity to incorporate more frequent touchpoints in person or virtually. For instance, have regularly scheduled meetings to discuss organizational goals or plans to assess the funded work, especially with grantees who historically may not have had as much frequent contact with the Foundation.
- ▶ Continue to identify opportunities to more clearly communicate the Foundation's goals and strategy – allowing grantees to connect their funded work with the broader efforts of the Foundation.
 - Relatedly, work to clarify the role diversity, equity, and inclusion plays in the Foundation's work and share the approach with grantees.
- ▶ Identify and maintain the most helpful aspects of the Foundation's processes. Solicit further feedback from grantees about whether an online portal would fit both grantees' and the Foundation's needs while ensuring the ease and flexibility of the current process is not lost.

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