

# Key Findings and Recommendations from the Grove Action Fund and/or Grove Foundation 2021 Grantee Perception Report

Prepared by the Center for Effective Philanthropy

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*In February and March of 2021, The Center for Effective Philanthropy conducted a survey of Grove Action Fund and/or Grove Foundation (“Grove”) grantees. The memo below outlines CEP’s summary of key strengths, opportunities, and recommendations. Grove’s grantee perceptions should be interpreted in light of its goals and strategies.*

*This memo accompanies the comprehensive survey results from 124 respondents (a 66% response rate) found in Grove’s interactive online report at <https://cep.surveystats.org> and in the downloadable online materials, including grantees’ written comments. The full report also contains more information about survey analysis and methodology.*

*CEP analyzes results of this survey by demographic characteristics of respondents. A summary of these findings, as well as other DEI-related measures can be found in your interactive report at <https://cep.surveystats.org/DEI>.*

*Throughout this summary, Grove’s ratings are defined as higher than typical when it is rated above the 65<sup>th</sup> percentile in CEP’s overall dataset, lower than typical when below the 35<sup>th</sup> percentile, and typical when ratings fall in between those thresholds. Ratings described as “significantly” higher or lower reflect statistically significant differences at a P-value less than or equal to 0.1.*

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## Continued Strength in Perceptions of Impact on Grantees’ Fields

- ▶ As in 2015, grantees recognize Grove’s strong impact on and understanding of their fields, providing ratings in the top quartile of CEP’s comparative dataset.
- ▶ Grantees see Grove’s effect on public policy and advancement of knowledge as distinct strengths, providing average ratings that are in the top 20 percent of the dataset.
  - In written responses, grantees express gratitude for this role, thanking Grove and its staff for their “important voice in the space” and encourage the Foundation to “help educate other foundations about how to do it right.”
- ▶ Additionally, grantees’ ratings are exceptionally high for the extent to which the Foundation understands the social, cultural, or socioeconomic factors that affect grantees’ work, their intended beneficiaries’ needs, and for the extent to which Grove’s funding priorities reflect beneficiaries’ needs.
  - Grantees report an overwhelming majority of the Foundation’s grants (88 percent) benefit historically disadvantaged groups, compared to 70 percent at the average funder.



*“They have been strong allies and leaders in the field for many years and consistently show up for the undocumented community in a way that we would like to see other funders replicate.”*



*“The special sauce and uniqueness of Grove is its leadership. The fact, that as organizer and community leader - you can connect easily with Grove leadership and be able to explain the reality of what is happening in the ground and how to pivot to keep building community power.”*

## **Strong Relationships with Opportunity to Improve Communications**

- ▶ 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 on their organizations, fields, and local communities.

### **Stellar Interactions with Grantees**

- ▶ Grove’s grantees provide higher than typical ratings for many aspects of their relationships: responsiveness, respectful interactions, compassion, and approachability. Grantees praise the “thoughtful” Grove staff, note that the relationship “feels like a partnership” and feel they can “share openly and also ask for honest feedback, and not strictly within the context of a grant received...”
  - Ratings are particularly strong for the extent to which Grove exhibits trust in grantees’ staff throughout the grant. On this measure, grantees’ ratings place Grove in the top 5 percent of CEP’s dataset.
  - Furthermore, ratings for the extent to which Grove is open to grantee ideas are significantly higher than in 2015, and also near the top of the dataset.
- ▶ These strong relationships are built even though grantees report interacting less frequently with Grove compared to the typical funder in the dataset. Nonetheless, the level of interaction Grove staff has with grantees does seem to matter. Grantees who report interaction at least a few times a year rate significantly higher for many measures in the survey, including perceptions of impact and aspects of the funder-grantee relationship.



*“The relationship that we have with our Grove point of contact is exceptional in our opinion. She is extremely well informed in our area of work. She is generous with her time. She feels more like a thought-partner than someone who is scrutinizing us. But we value her so much that we are driven to make her proud to champion our work!”*

### **Room to Improve Communication with Grantees**

- ▶ Similar to 2015, grantees provide lower than typical ratings when asked about various aspects of Grove’s communications; these are among the few measures where Grove is *not* rated in the top quarter of CEP’s comparative dataset.

- ▶ The Foundation receives ratings near the bottom of the dataset for the clarity with which it has communicated its goals and strategy to grantees. Additionally, when asked how well they understand the way in which the work funded by the grant fits into the Foundation’s broader efforts, grantees indicate they have a less than thorough understanding, rating 5.15 out of 7.
  - Improving the clarity of communications surrounding the Foundation’s strategy is one of the most common themes in grantees’ open-ended responses with 11 percent of respondents asking to better understand “Grove’s overarching goals and strategic objectives, and where we, as [grantees] fit into those conversations.”
  - However, grantees do recognize efforts Grove is initiating in this area. When asked to comment on the recently launched website grantees note that “it highlights the programmatic priorities of Grove and clearly communicates its strategies to achieve those priorities” (almost half of grantees report visiting the new Foundation website).
- ▶ While grantees strongly agree that staff they interact with demonstrate a commitment to DEI (6.42 on a 1-7 scale) and that Grove is committed to combatting racism (6.17), they agree less strongly that the Grove has clearly communicated what DEI means for its work (5.60).
- ▶ Grantee ratings differ by respondent-provided demographic data. Specifically:
  - Although respondents who identify as a person of color on the whole offer positive ratings, on some survey measures they rate less positively than respondents who do not identify as a person of color, including aspects of the Foundation’s understanding of their communities, organizational context, and beneficiaries, as well as for the extent to which Grove staff have demonstrated a commitment to DEI and trust in grantees’ staff.
  - Perhaps relatedly, a handful of grantees request the Foundation clarify their goals and commitment to racial justice.



*"Public-facing materials could make stronger statements in support of their commitments to racial justice. For example, on the Grove website, program descriptions imply deep knowledge of their priorities and fields, and a financial commitment. Yet they do not explicitly articulate why."*

## Strong Impact on Grantees’ Organizations

- ▶ Grantees provide higher than typical ratings, in the top 30 percent of the dataset, for the Foundation’s awareness of their challenges and impact on and understanding of their organizations.
- ▶ Thirty six percent of Grove grantees – a smaller than typical proportion – report receiving some form of non-monetary assistance beyond the grant. Of these grantees, almost 80 percent indicate that it provided a benefit to their organization or work.
  - In line with CEP’s research, Grove grantees who receive some form of non-monetary support rate significantly higher across a few measures in the survey including perceptions of impact on grantees’ organizations.

## Grantmaking Characteristics

- ▶ At the median, Grove offers grants that are in line with the typical funder in CEP’s dataset in terms of size and length. The table below shows Grove’s grantmaking characteristics compared to the typical overall and cohort funders.

	Grove 2021	Average Funder	Average Cohort Funder
<b>Median Grant Size</b>	\$80K	\$100K	\$147.5K
<b>Median Organizational Budget</b>	\$1.9M	\$1.5M	\$2.1M
<b>Average Grant Length</b>	2 years	2.2 years	2 years
<b>% Unrestricted Grants</b>	70%	24%	N/A
<b>% Receive Consistent Funding</b>	74%	53%	64%

- ▶ A funder’s grantmaking characteristics are often related to perceptions of its impact. CEP’s research finds that larger, multi-year, and/or general operating support grants are each associated with more positive perceptions of impact on grantees’ organizations.
  - The Foundation provides a much larger than typical proportion of grantees with multi-year, unrestricted support – 36 percent compared to eight percent at the typical funder. Grantees value this approach: those who receive multi-year unrestricted support provide significantly higher ratings for the Foundation’s impact on their organizations and its awareness of their challenges.



*“Grove is one of the few foundations that offer core support and their expectations of us spending hours preparing lengthy proposals or reports are minimal...”*

## Outstanding Grantmaking Processes

- ▶ Grove’s grantmaking processes emerge as a clear strength for the Foundation, with ratings for several related survey measures trending upwards since 2015 and now at the top of the dataset.
- ▶ At the median, grantees report spending 10 hours, a much lower than typical amount of time, on required Foundation processes over the course of their Grove grant. As a result, at the median, Grove grantees receive a higher than typical dollar return (grant dollars awarded per process hour required), \$8,300 as compared to \$2,500 for the typical funder.

## Selection Process

- ▶ Grantees rate the helpfulness of the Foundation’s selection process in strengthening their organization and programs higher than typical and higher than in 2015, while reporting experiencing a lower than typical amount of pressure to modify their organization’s priorities in order to receive funding.
- ▶ Grove decision making is also fast, with ninety-four percent of grantees waiting less than 3 months between the submission of an application and receipt of a commitment of funding.

## Reporting and Evaluation Process

- ▶ The Foundation receives higher than typical ratings on all measures related to its reporting process. In particular, it receives exceptional ratings for the extent to which the reporting process was relevant and adaptable.
  - A smaller than typical proportion of grantees report having substantive discussions with Grove during its grant processes about how they will assess the results of their grant. Grantees who report having discussed their assessment results rate significantly higher across several measures in the survey, including clarity and consistency of the Foundation’s communication and for aspects of Grove’s understanding.
- ▶ Grantees who report participating in an evaluation process provide typical ratings on all measures related to the evaluation process: the extent to which it incorporated input from their organization and resulted in grantees making changes to the work that was evaluated.



*“...The conversations are often informal, but substantive, helpful, and have generally resulted in important support for our organization. The requirements for applying and reporting on grants is not cumbersome.”*



*“My only feedback is that I think there could be an opportunity for Grove to use the evaluation process as a moment for organizations to reflect and gather feedback that would be helpful for their own internal processes as well as for grant reporting.”*

## CEP Recommendations

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

- ▶ Reflect on the aspects of the Foundation’s practices, approaches, and culture that have contributed to such strong perceptions of its impact on and understanding of grantees’ fields and organizations and continue to reinforce these strengths. Similarly, identify, codify, and maintain the practices that have enabled such positive relationships with grantees to ensure continued effectiveness.
- ▶ Identify opportunities across interactions, processes, and communication resources to reinforce Grove’s current goals and strategies:
  - In interactions, focusing on clear articulation of how each organization fits into Grove’s priorities and long-term vision.
  - In written resources, consider ways to make funding opportunities and goals clearer.
  - Given grantees’ lower ratings for Grove’s communication about its commitment to DEI, identify areas where Grove would like DEI principles to be recognized as core to its work and explore strategies to clearly communicate its ongoing and future efforts to grantees.

- ▶ Recognizing resource constraints, consider whether more frequent and reciprocal interactions with grantees are possible.
- ▶ Given the association with more positive perceptions, engage as many grantees as possible in prospective discussions about the assessment of grant-funded work.