

# Cone Health Foundation Grantee Perception Survey Report

North Carolina Network of Grantmakers  
November 2013



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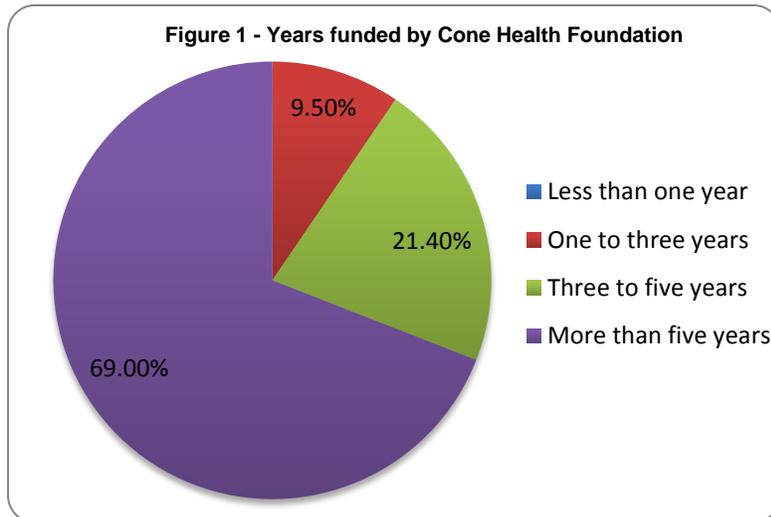
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## Overview

In preparation for internal strategic planning to commence in 2014 and to gain insights into how grantees perceive its effectiveness as a grantmaker and community partner, Cone Health Foundation (hereinafter “Foundation”) engaged the North Carolina Network of Grantmakers (hereinafter “NCNG”) to conduct a perception survey of Foundation grantees in the fall of 2013. NCNG administered a survey to 47 grantees through Survey Monkey, an online survey resource, over a two-week period. At the close of the survey, 42 responses had been received, for an 89% response rate. The clear majority of respondents who actually completed the survey identified themselves as management or executive staff.

## Demographics

More than two-thirds of respondents represent organizations that have been funded by the Foundation for more than five years. About one-third of respondents represent organizations that have received funding from the Foundation for less than five years. (See Figure 1)

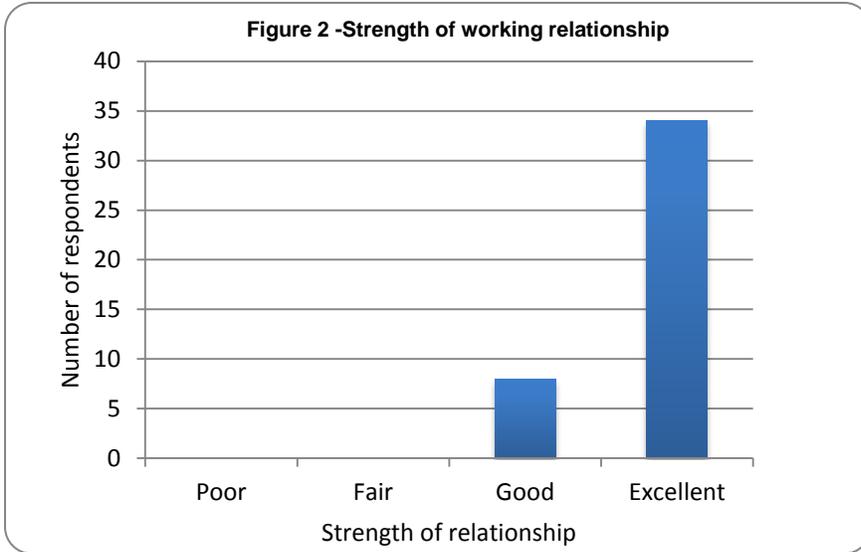


The overwhelming majority of respondents reported having fewer than 20 employees whose work is supported by grants from the Foundation. About half of this group reported having up to three employees whose work is supported by a Foundation grant while the other half reported having four to 10 employees. Only five respondents reported

having more than 20 employees whose work is supported by Foundation grants.

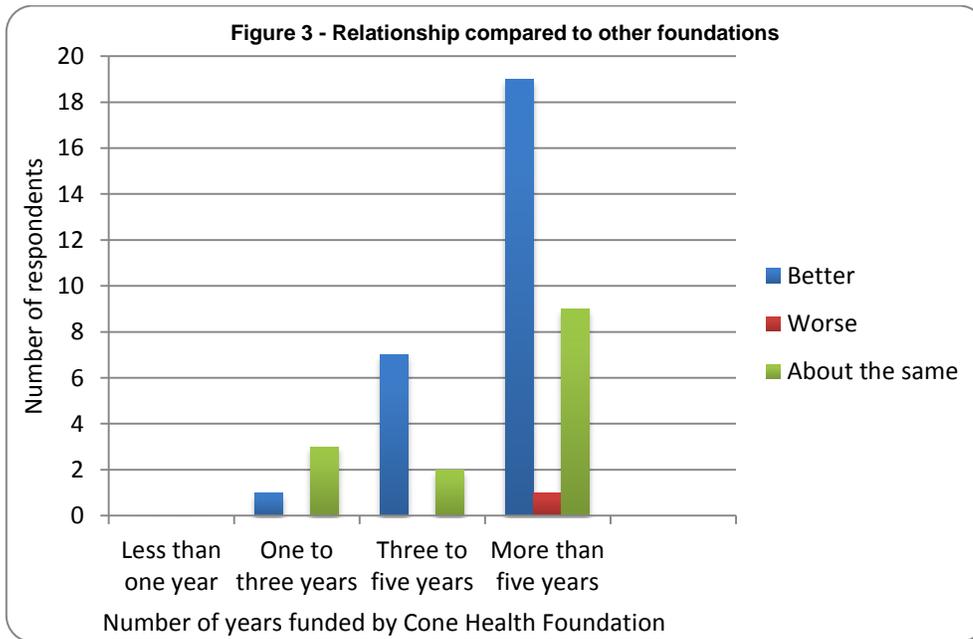
## Overall impressions

Generally, Foundation grantees are satisfied in their direct interactions with the Foundation. On a four-point rating scale, survey respondents gave their overall working relationship with the Foundation an average 3.81 rating: 81% of respondents reported an “excellent” working relationship with the Foundation, the highest rating, while 19% reported a “good” working relationship, the second highest rating. (See Figure 2)

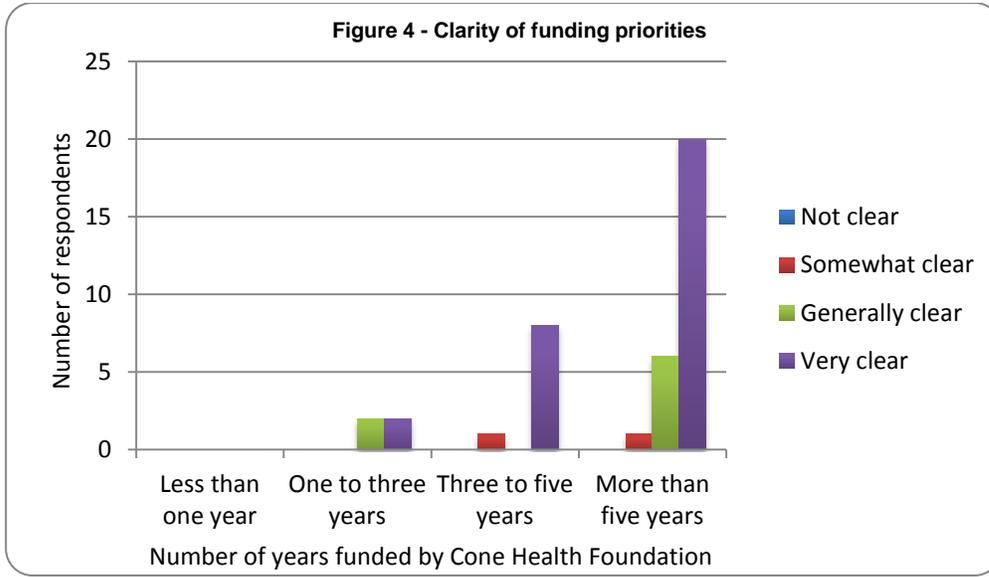


Compared to relationships with other foundations, almost all respondents rated their working relationship with the Foundation either better (64.3%) or about the same” (33.3%). Respondents who indicated that they had been grantees of the Foundation for three or more years reported better working relationships with the Foundation compared

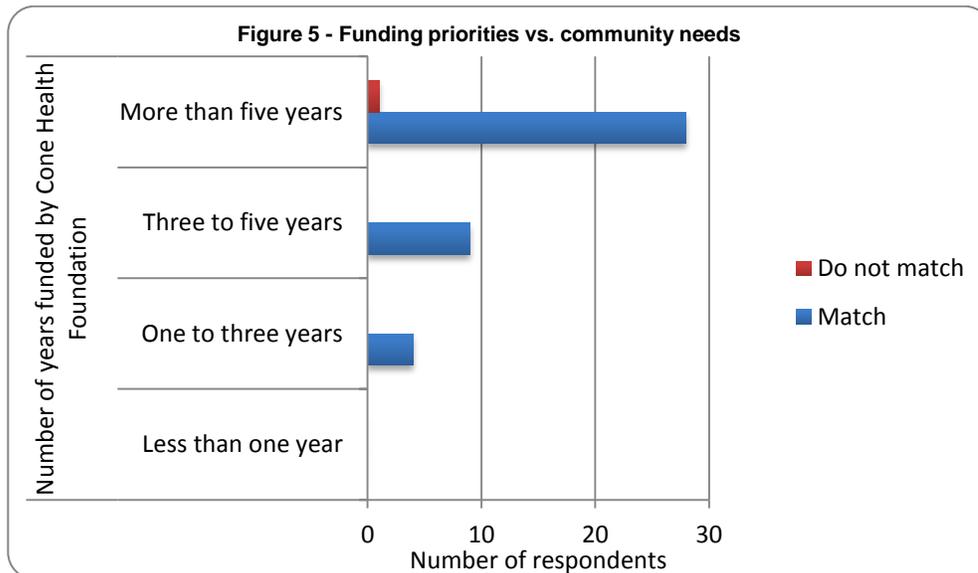
to other foundations. (See Figure 3) A majority of respondents who offered commentary regarding the status of their relationship with the Foundation compared to other foundations noted strong, open, and regular communication with Foundation staff. Several respondents also noted the Foundation’s high level of engagement in working with grantees to address key community health issues.



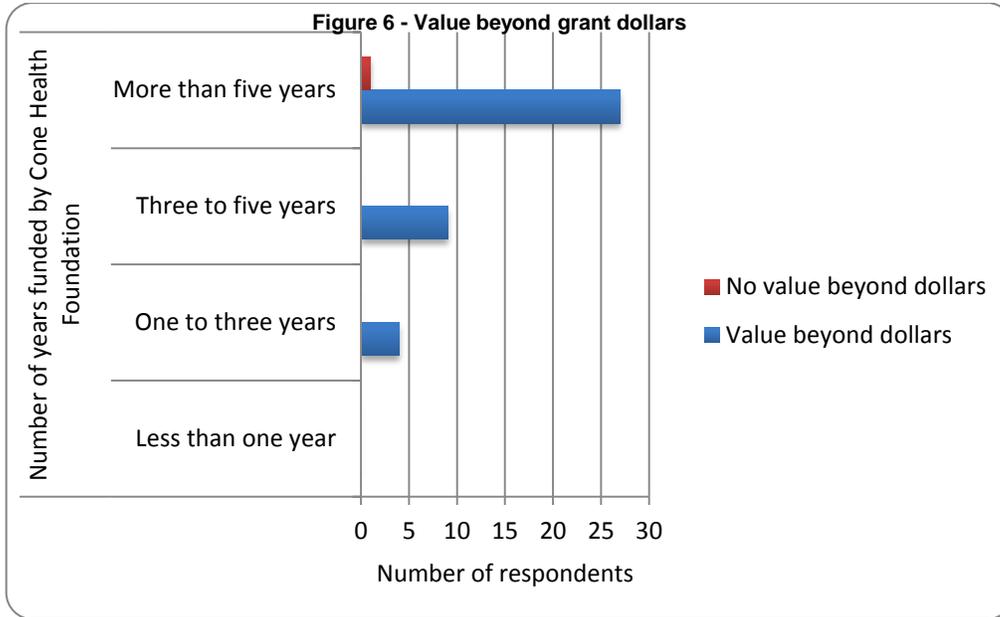
Foundation grantees reported similar satisfaction with the Foundation’s performance overall. The majority of respondents reported that the Foundation’s funding priorities are very clear though the longer respondents have been Foundation grantees, the clearer they reported the priorities to be. (See Figure 4)



Nearly all respondents perceive that the Foundation’s funding priorities match the health priorities of the community with the majority of those being respondents who have been grantees for more than five years. (See Figure 5)



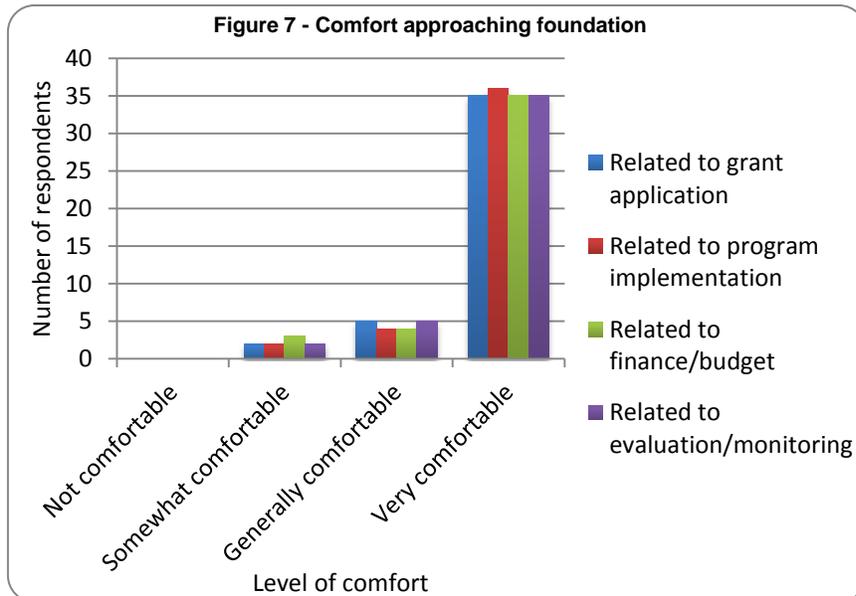
A majority of respondents also reported value in working with the Foundation beyond the grant dollars received with the majority of those being respondents who have been grantees for more than five years. (See Figure 6) Respondents’ comments suggest that the ability to leverage the Foundation’s reputation or credibility and funding with other community partners or foundations adds the greatest value in working with the Foundation beyond grant dollars received. Training opportunities and information sharing were other commonly noted non-grant benefits.



Survey responses overall, and comments to specific questions about strong performance areas, suggest that the Foundation’s greatest strength areas include communication with grantees and in providing educational information; relationship building between staff and grantees and also between grantees and other community partners; and identifying and addressing community health needs and issues. Common words used to describe the Foundation include: committed, supportive, responsive, and engaged.

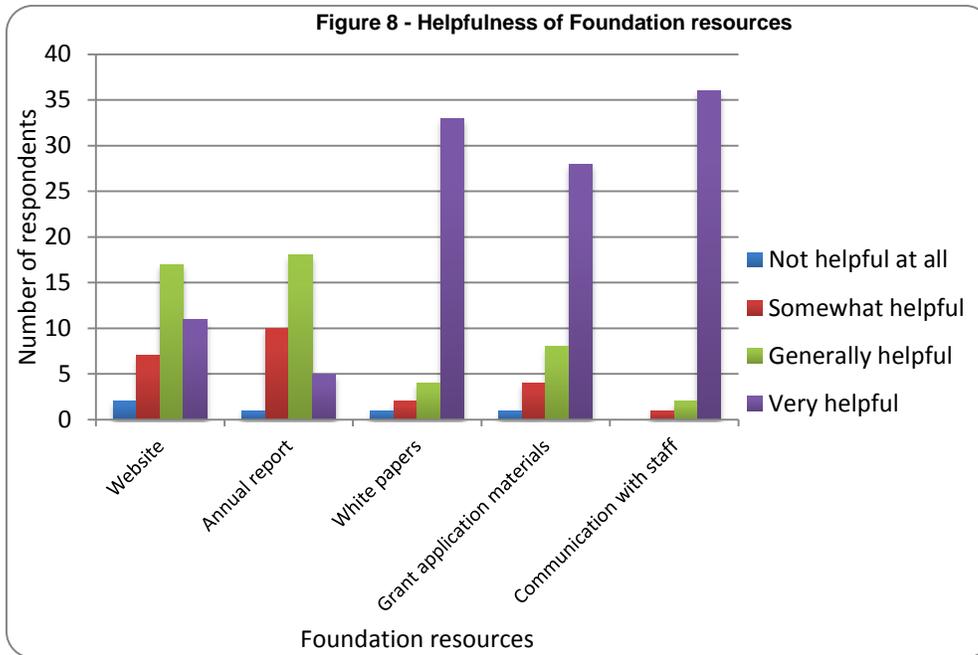
**Communications**

Overall, survey respondents reported that the Foundation is generally or very responsive. On a four-point rating scale, survey respondents gave the Foundation a 3.71 average rating, with 73.8% of respondents indicating that the Foundation is “very responsive,” the highest rating.



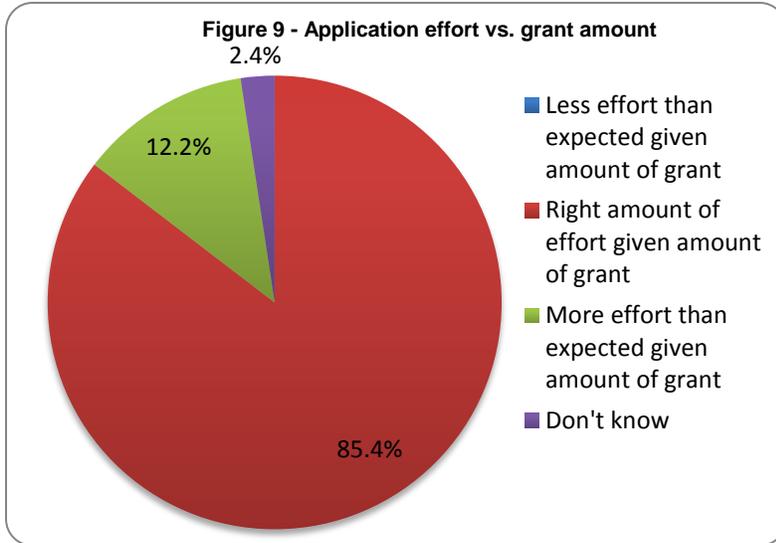
Foundation grantees generally reported high levels of comfort approaching Foundation staff with problems related to grant applications (3.79 average rating on a 4.0 scale), program implementation (3.81 average rating on a 4.0

scale), finance/budget (3.76 rating on a 4.0 scale), and evaluation/monitoring (3.79 average rating on a 4.0 scale). (See Figure 7) Most respondents indicated that various Foundation resources are at least generally helpful in the management of grantee programs. Individual communications with Foundation staff appear to be the most helpful to grantees in managing their programs, followed by Foundation white papers. (See Figure 8) On a four-point scale rating level of helpfulness, survey respondents gave individual communications with Foundation staff a 3.90 average rating with 92.3% of respondents reporting these discussions to be “very helpful,” the highest rating; and Foundation white papers a 3.73 average rating with 82.5% of respondents reporting the highest rating. Foundation grant application materials also rated favorably (3.54 average rating). The Foundation website and annual report, while regarded as generally helpful, received the lowest average ratings, at 3.00 and 2.79 respectively. Generally, survey respondents reported that their primary purposes in using the Foundation website are to access information from white papers and Foundation forms.

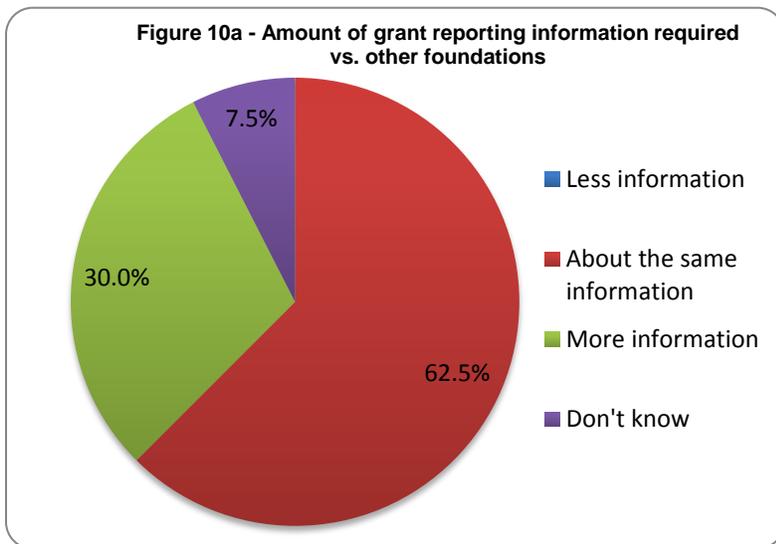


### Grant application and reporting process

The overwhelming majority of respondents reported that the Foundation’s grant application guidelines are clear. On a four-point rating scale, 45.7% of respondents indicated that the guidelines are “extremely clear,” the highest rating, while 45.0% of respondents indicated that the guidelines are “generally clear,” the second highest rating. Similarly, respondents were nearly unanimous that the frequency of contact with Foundation staff during the grant cycle is “just right.” A clear majority of respondents (85.4%) noted that the amount of effort needed to complete the Foundation’s grant application process is appropriate relative to the size of grant awards. (See Figure 9) Five respondents reported a negative balance between the amount of application effort and grant award.



Most respondents reported that the Foundation’s reporting and evaluation process is helpful in strengthening their program or organization. On a four-point rating scale, 82% of respondents indicated the two highest ratings for level of helpfulness. Similarly, most respondents reported that the Foundation’s grant reporting requirements are reasonable given the size of grants. On a four-point rating scale, 85% of respondents indicated the two highest ratings for reasonableness of grant reporting requirements relative to grant awards.

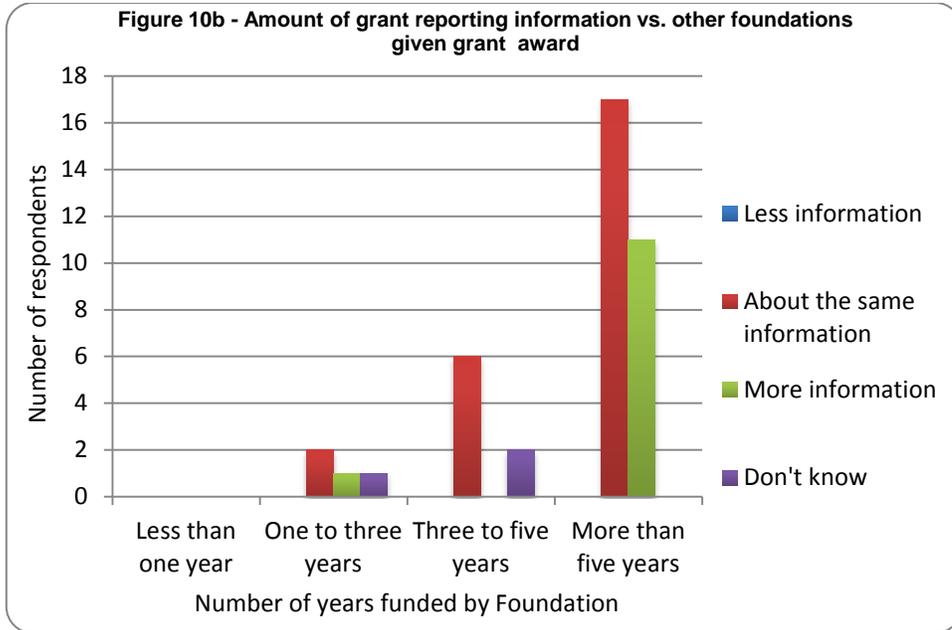


Compared to other foundations, a majority of survey respondents (62.5%) reported that the Foundation requires about the same amount of grant reporting information as other foundations providing similarly sized grants. (The majority of these respondents have been Foundation grantees for more than five years.) About one-third of respondents reported that the Foundation requires more

information compared to other foundations. (See Figures 10a and 10b)

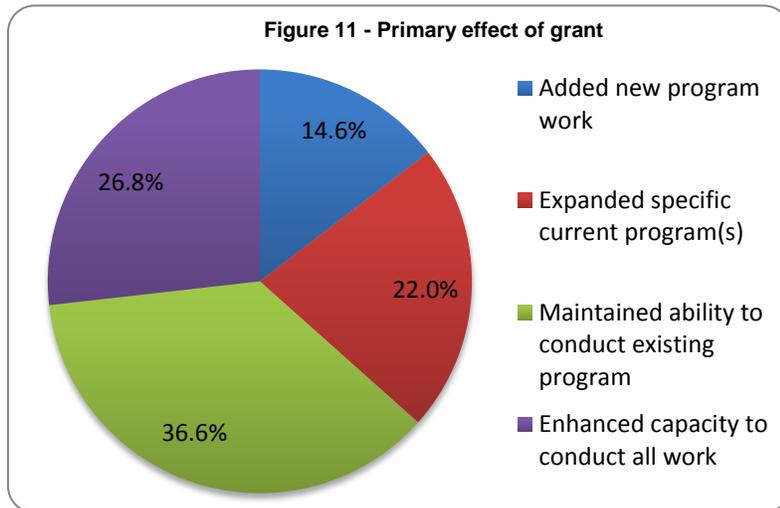
While the clear majority of respondents (83.3%) indicated that the Foundation’s grant decision making process is clear, a handful of comments suggest that even respondents who have been grantees of Cone Health Foundation for more than five years are not clear about how final funding decisions are made.

To the extent that respondents had any suggestions for improvement in Foundation processes or services, respondents generally identified grant reporting as the primary process needing improvement. Both timing of reports (quarterly reporting being too frequent) and simplifying certain forms (e.g., financial template and budget report form) were commonly identified as processes to reconsider. Several comments also suggest that the grant application should be reviewed to simplify questions or eliminate redundancy.



**Effectiveness in the field**

All respondents reported that the Foundation has at least a reasonable, if not very good understanding of their program’s strategies and goals. The longer respondents have been Foundation grantees the higher level of understanding they reported; for instance, respondents who have been grantees for more than five years comprised the overwhelming majority of those who indicated the highest level of understanding.



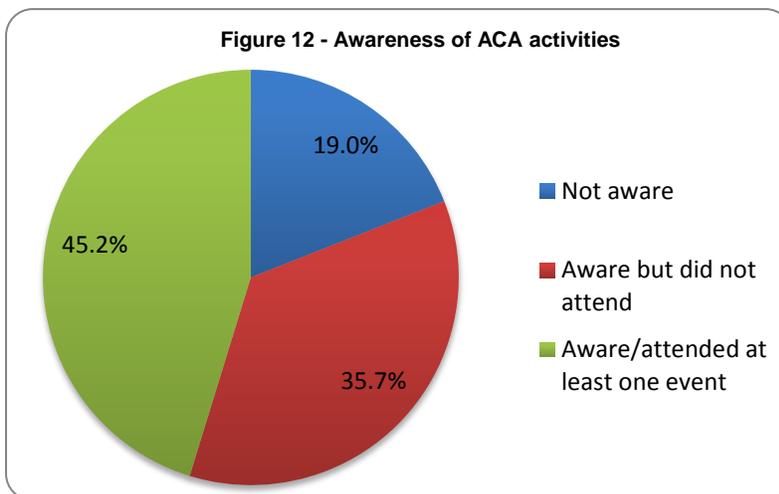
The majority of respondents also reported that the Foundation has had a significant impact on their organization: on a four-point scale, survey respondents gave a 3.76 average rating for level of impact. Respondents who have been grantees for more than five years comprised the majority of respondents indicating a “significant impact,” the highest rating on a four-point scale measuring impact. Among these

grantees, the average rating for level of impact was 3.83.

Over one-third of respondents reported that the greatest primary effect of receiving a Foundation grant has been to maintain their ability to conduct an existing program that would otherwise have been reduced or discontinued. About one-quarter of respondents indicated that

the primary effect of their grant award has been to enhance capacity to conduct all of their work. About one-fifth of respondents indicated that their grant award's primary effect was to allow expansion of a specific program currently in existence. Nearly 15% of respondents reported the primary effect of their grant award was to fund additional program work that was new to the organization. (See Figure 11) Generally, survey respondents recognized Cone Health Foundation as a community leader or advocate in their subject area with 81.0% of respondents indicating a significant level of leadership, the highest rating on a four-point scale. Respondents who have been grantees for more than five years comprised the majority of respondents who indicated that Cone Health Foundation has demonstrated "significant leadership" in their subject area. Among these grantees, the average rating for level of leadership was 3.69.

### *Affordable Care Act public education*



Regarding the Foundation's public education efforts on the Affordable Care Act over the last two years, 81% of the respondents reported being aware of those events, and over half of these respondents reported having attended at least one event. (See Figure 12) The majority of those aware of these events have been Foundation grantees for more than five years. About one-fifth of

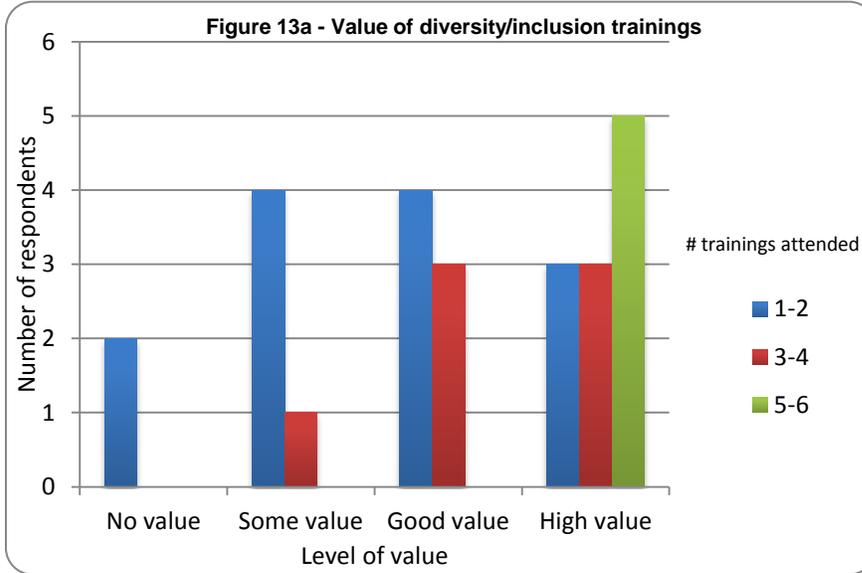
respondents reported being unaware of the Foundation's Affordable Care Act public education activities. Of those who reported attending at least one event, most respondents found the event generally effective though not highly effective. Respondents who reported attending at least one Affordable Care Act education event generally encouraged the Foundation to continue providing such learning opportunities but also offered various feedback on future public education endeavors. Among 30 responses, suggestions included wider publicizing of these events, including delivering promotional materials to funded agencies that would help them promote events, and expanding smaller events to target "parts of the community that do not come to more formal presentations."

### *Diversity and inclusion trainings*

Over half (59.5%) of the survey respondents reported participating in a diversity and inclusion training organized by the Foundation for its grantees. All of these respondents have been Foundation grantees for three or more years; 80% of this subgroup has been grantees of the Foundation for more than five years. Of the 25 respondents who reported participating in these trainings, about half reported attending one to two trainings while the other half attended three to six trainings. One-fifth of these 25 respondents reported attending five to six trainings. The majority of respondents who attended the diversity and inclusion trainings found the trainings

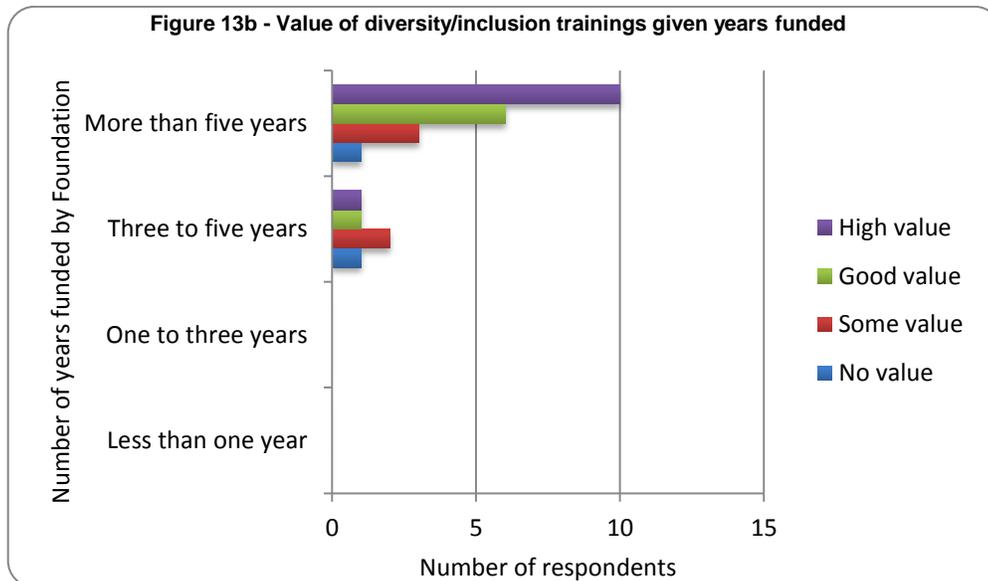
added at least some value to their work: on a four-point scale, the average rating given to the value of the trainings was a 3.08. The number of trainings attended appears somewhat correlated to the level of value respondents reported. On a four-point scale, respondents who attended five to six trainings gave an average value rating of 4.0; respondents who attended three to four trainings gave an average value rating of 3.29; and respondents who attended one to two trainings gave an average value rating of 2.62. (See Figure 13a)

Additionally, respondents who have been Foundation grantees for more than five years



generally found higher value in the trainings than respondents who have been grantees for less than five years. (See Figure 13b) Respondents who reported having attended five to six trainings generally indicated that participation in these trainings enhanced their self-awareness of the ways in which they

interact and may be perceived by their clients. Respondents who reported attending three to four trainings generally reported greater understanding of community needs and improved cultural awareness. Respondents who reported attending one or two trainings generally reported heightened awareness of diversity issues in the community.



## **Conclusions**

Generally, Cone Health Foundation grantees are extremely appreciative of the Foundation's presence and work in the community. Though some respondents noted areas of potential improvement, these suggestions tend to be related to processes and not the mission or substantive work of the Foundation. Survey responses overall suggest that open and regular communication is a hallmark characteristic of grantee working relationships with Foundation staff. Survey responses also generally suggest that Cone Health Foundation excels at building relationships over time, not only with grantees but among community partners. Cone Health Foundation grantees also readily recognize the Foundation as a leader in identifying and addressing health issues impacting the community and generally affirm the value of efforts to educate grantees and the larger community through white papers and public education briefings and trainings. While survey respondents who identified themselves as having been Cone Health Foundation grantees for more than five years generally provided the most positive feedback overall, the Foundation is perceived by its grantees overall as a committed and valued partner in the community.