Key Findings and Recommendations from
The Clowes Fund
2017 Grantee Perception Report
Prepared by The Center For Effective Philanthropy

In May and June of 2017, The Center for Effective Philanthropy conducted a survey of The Clowes Fund (“Clowes” or “the Fund”) grantees, achieving a 76% grantee response rate. The memo below outlines the key findings and recommendations from the Fund’s Grantee Perception Report (“GPR”). Clowes grantee perceptions should be interpreted in light of the Fund’s goals, strategy, and context.

This memo accompanies the comprehensive report.

Overview

Overall, The Clowes Fund continues to receive ratings that are more positive than typical from its grantees, though several measures trend lower from when Clowes last conducted the GPR in 2010. Clowes grantees continue to rate higher than typical for the Fund’s grant processes, their relationships with Fund staff, and the extent to which the Fund understands their context and the needs of their intended beneficiaries. However, ratings are now similar to those of the typical foundation for the Fund’s understanding of and impact on grantees’ communities, and its impact on grantees’ organizations. Grantees’ ratings do not differ consistently when they are segmented by the region in which they work.

Remarkably Helpful Grant Processes

- Clowes is rated significantly higher than in 2010 and now in the top 10 percent of CEP’s dataset for the helpfulness of its selection process in strengthening grantees’ organizations/programs.
- Broadly, grantees have positive perceptions of the Fund’s reporting process as well.
  - Grantees agree strongly that the Fund’s reporting process is straightforward, adaptable and relevant to the work funded by their grant.
  - Further, a larger than typical proportion of grantees (67 percent) report having had a substantive discussion with the Fund about their submitted reports. Grantees also rate higher than typical for the reporting process being a helpful opportunity to reflect and learn.
  - Of note, Clowes staff involvement in the development of grantees’ proposals is tied to even more positive perceptions of the Fund’s reporting process. Grantees who report a higher level of staff involvement during proposal development (rating at least five on a 1-7 scale),
rate significantly higher for aspects of the Fund’s reporting process.

“This is the best grant process that we go through for this level of funding. I actually used Clowes as a reference recently when helping a smaller funder revamp their process.”

“With regard to the application, reporting and evaluation process, the level of detail required, and the information requested, is one hundred percent on point.”

Exceptional Relationships with Grantees with Declines in the Clarity and Consistency of Communications

• Similar to 2010, grantees rate the quality of their relationships with Clowes – a summary measure of the Fund’s interactions and communications with grantees – in the top 10 percent of CEP’s dataset.
  o One grantee, for example, states that, “The staff of the Fund are best described as our partners in the work we do. They take a genuine interest in the work we are accomplishing.”

• Ratings for grantees’ interactions with the Fund continue to be more positive than typical.
  o Compared to 2010, grantees experience more frequent and reciprocal contact with Clowes staff, and a significantly larger proportion of grantees than in the past report experiencing a site visit during the course their grants.
  o Grantees appreciate having more contact with Clowes staff. While they provide relatively few suggestions for improvement, the largest proportion of suggestions request even more frequent interactions and communications. One grantee, for example, writes that “More regular contact with Clowes [would] be beneficial.”

• Grantees also continue to have positive perceptions of the clarity and consistency of the Fund’s communications. However, while these ratings are still higher than typical, they represent a significant decline from the Fund’s ratings in 2010.

“I have found the Fund to be the most transparent, honest and accessible organization to work with.”

“More regular communication would be great.”

Strong Understanding of Grantees with Opportunity to Increase Impact on their Organizations

• Clowes grantees rate the Fund higher than typical, and similar to 2010, for its understanding of their strategies and goals.
  o Grantees also have exceptionally positive perceptions of how aware Clowes is of the challenges their organizations are facing.

• Grantees’ ratings for the Fund’s impact on their organizations, however, are more mixed – declining significantly since 2010 and now similar to the typical funder.

• CEP’s broader research finds that grantees who receive a specific pattern of relatively large, multi-year, operating support grants rate their funder’s impact on their organizations significantly more positively.
Clowes’ grantmaking characteristics remain similar to 2010, with grants that are longer than typical and a typical proportion of general operating support. Clowes’ grants, however, remain smaller in size than those of the typical funder.

Mixed Perceptions of Understanding of Grantees’ Communities and Beneficiaries

- Clowes is rated in the top 10 percent of funders for the extent to which its funding priorities reflect a deep understanding of grantees’ intended beneficiaries’ needs.
  - Likewise, grantees rate Clowes higher than 90 percent of funders in CEP’s dataset for the extent to which it understands the needs of their intended beneficiaries.
- Grantees’ ratings are also more positive than typical for how well the Fund understands the social, cultural, or socioeconomic factors that affect their work.
- However, grantees’ perceptions of the Fund’s impact on and understanding of grantees’ communities are now similar to those of grantees at the typical funder.
  - There are regional differences for these ratings. In particular, grantees located in Indiana rate significantly higher than grantees in other regions for the Fund’s impact on and understanding of their communities.

CEP Recommendations

Based on its grantee feedback, CEP recommends the Fund consider the following in order to build on its strengths and address potential opportunities:

- Continue to reinforce the aspects of the Fund’s selection and reporting processes that help strengthen grantees.
- Explore internally whether there are specific factors that have led to a decline in ratings regarding the Fund’s clarity and consistency of communications.
- If it is a goal to increase impact on grantees’ organizations, consider whether Clowes has the capacity to provide closely aligned grantees with larger, general operating, multi-year grants.
- Facilitate conversations with staff about what may have contributed to more typical perceptions of understanding of and impact on grantees’ communities, with particular attention to the approaches to community impact in Indiana and how that might be applied elsewhere.