

# Key Findings and Recommendations from the Charles & Margery Barancik Foundation 2022 Grantee Perception Report

Prepared by the Center for Effective Philanthropy

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*In May and June of 2022, The Center for Effective Philanthropy conducted a survey of the Charles & Margery Barancik Foundation's ("the Foundation" and "Barancik") grantees. The memo below outlines CEP's summary of key strengths, opportunities, and recommendations. The Foundation's grantee perceptions should be interpreted in light of Barancik's goals and strategies.*

*This memo accompanies the comprehensive survey results from 79 respondents (a 90% response rate) found in Barancik's interactive online report at <https://cep.surveyresults.org> and in the downloadable online materials, including grantees' written comments. The Foundation's 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.*

*Throughout this summary, the Foundation'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 it is rated 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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## Overview

The Center for Effective Philanthropy is pleased to share the results of the Charles & Margery Barancik Foundation's first survey of its grantees.

- ▶ Overall, grantees report exceptionally positive experiences with the Barancik Foundation across measures throughout the report. Grantees' feedback highlights their perceptions of the Foundation's strong impact on their communities and organizations, outstanding relationships with grantees, and its helpful grantmaking processes.
  - Barancik is at the 100<sup>th</sup> percentile in CEP's comparative dataset of over 300 funders on several key measures: impact on grantees' local communities, impact on grantees' organizations, clarity of communication of goals and strategy, and the extent to which the application process was a helpful opportunity to strengthen efforts funded by the grant.
- ▶ Grantees highlight opportunities to build on Barancik's strong practice of providing non-monetary assistance, in particular around supporting collaboration and convenings. About half of Barancik grantees report that they receive non-monetary assistance, and most perceive it as a major benefit to their organizations.

## Exceptionally Positive Perceptions of Community Impact and Understanding

- ▶ Grantees perceive Barancik Foundation to have a strong impact on their local communities, providing ratings that place the Foundation as *the highest rated funder* in CEP's comparative dataset.
  - Supporting grantees' perceptions of community impact could be their perceptions of Barancik's strong understanding of their communities, the needs of the people and communities that grantees serve, and the social, cultural, and socioeconomic factors that affect grantees' work. On these three measures, grantees provide ratings that place Barancik in the top three percent of funders in CEP's dataset.
  - In their written responses, grantees praise Barancik's ability to identify and address community needs as a strong partner. As one grantee describes, "[the Foundation] identifies important community issues, seeks ways to help solve them in meaningful ways, and puts its money where its mouth is. The organization is open, accessible, and acts as partner in helping solve community problems and issues."
- ▶ Grantees also provide higher than typical ratings for their perceptions of Barancik's impact on their fields, and for the degree to which the Foundation has advanced knowledge in their fields and affected public policy. They provide typical ratings for Barancik's understanding of their fields.
  - In their comments, when grantees mention the Foundation's positive impact on their fields, it's often in conjunction with its impact on their communities. As one grantee mentions, "The Foundation is a powerful and respected presence in countless fields in our community."

### Barancik Initiatives

- ▶ Barancik's Initiatives are an important way in which the Foundation works in collaboration with other organizations to create community impact. Barancik identified 32 percent of grantees as an Initiative Partner and 61 percent of grantees indicated that their organization participated in at least one of the Foundation's initiatives.
  - Barancik's initiative participants strongly agree that Foundation staff was well-prepared and respectful, that the meetings had clear objectives and next steps, and that meetings were worthwhile and effective.



*"Barancik Foundation provides critical, targeted, compassionate and deeply relevant support to enhancing the quality of life and in-depth understanding of important issues impacting communities throughout the greater Sarasota, Manatee and DeSoto county areas."*



*"They have been thought leaders on the importance of collaboration, capacity building, concept of 'social capital' investing in programs that result in wider and intergenerational positive impact for the community."*

## Positive Organizational Impact – With Opportunities to Build on Already Strong Non-Monetary Assistance and Grantmaking Characteristics

- ▶ Grantees perceive Barancik to have an exceptionally strong impact on and understanding of their organizations, rating the Foundation among the top two percent of funders in CEP’s comparative dataset on these two measures.
  - In their comments, grantees describe the Foundation as “encouraging,” “supportive,” and “a true partner.”
  - Grantees also provide exceptionally positive ratings for Barancik’s understanding of the challenges their organizations are facing, placing the Foundation in the top one percent of funders in CEP’s comparative dataset.

### Requests for Expanded Provision of Assistance Beyond the Grant

- ▶ The provision of non-monetary support is one important way in which funders can strengthen grantee organizations. About half of Barancik grantees report receiving non-monetary assistance alongside their grant, and nearly all of those grantees indicate that support is a moderate or major benefit to their organizations.
  - Grantees who receive non-monetary assistance rate significantly higher across many measures, including Barancik’s impact on and understanding of their organization and openness to ideas from grantees, and for their understanding of how their funded work fits into the Foundation’s broader efforts.
- ▶ As one form of assistance beyond the grant, Barancik provides some of its grantees with access to the Unite Us referral database. Forty-three percent of Barancik grantees report that they use or are in the process of using this database. These grantees only moderately agree that the database increases community collaboration, helps their organization fulfill their mission, or increases their organization’s care coordination efficiency and capacity to meet its clients’ needs.
- ▶ Grantees have an appetite for additional non-monetary assistance. Non-monetary assistance is tied for the most frequently mentioned topic in grantees’ suggestions for improvement, with six grantees requesting more opportunities for collaboration and convening, as well as organizational capacity building support.

### Impactful Grantmaking Characteristics, with Requests for More Multiyear Unrestricted Funding

- ▶ CEP’s broader research finds that larger, multi-year, and/or unrestricted support grants are associated with more positive perceptions of impact on grantees’ organizations.
  - Barancik awards grants that are \$230K at the median, which is over twice that of the typical funder in CEP’s comparative dataset.
  - Forty-eight percent, a typical proportion, of grantees report receiving multi-year grants, and 14 percent, also a typical proportion, receive unrestricted funding. A typical proportion of grantees report receiving multi-year unrestricted grants.

- ▶ In their suggestions for improvement, five grantees mention opportunities around the Foundation’s grantmaking characteristics, requesting multiyear and/or general operating support. As one respondent explains, “[m]ore general operating funding is essential to address the multifaceted aspects of our low-income constituents.”



*“The Foundation has helped us to amplify our messages through assistance with outreach and social media, to positive effect. The credibility behind the Barancik Foundation gives much added weight to the messages.”*

## Stellar Relationships with Grantees

- ▶ CEP’s research finds that funder-grantee relationships – defined by high quality interactions and clear, consistent communications – are one of the strongest drivers of grantees’ perceptions of a funder’s impact on their fields, communities, and organizations.
- ▶ Grantees report very positive interactions and communications with the Foundation, with their ratings placing the Foundation within the top 5 percent of all funders across nearly all related metrics.
  - Notably, Barancik is at the 100<sup>th</sup> percentile in CEP’s dataset for the clarity with which it communicates its goals and strategy.
- ▶ The patterns with which Barancik interacts with its grantees – frequent, reciprocal or program officer-initiated contact – support its strong relationships with them. Thirty percent of grantees, a higher than typical proportion, report having contact with the Foundation monthly or more often. In addition, 70 percent of grantees report that contact with their program officer was either initiated reciprocally or by their program officer.
  - Grantees whose program officers initiate contact or who initiate contact reciprocally provide significantly higher ratings across many measures, such as their comfort in approaching Barancik with problems, respectful interactions, the clarity and consistency of Barancik’s communications, as well as Barancik’s transparency and candor.

## Opportunity to Deepen Mutual Understanding with First-Time Grantees

- ▶ Forty percent of Barancik’s grantees identify themselves as first-time grantees, a higher than typical proportion.
- ▶ While still generally reporting more positive experiences than grantees at 75 percent of other funders in CEP’s comparative dataset, Barancik’s first-time grantees rate significantly lower compared to previously funded grantees on several measures related to the Foundation’s understanding of their contexts and their own understanding of the Foundation’s strategy.



*“The Barancik Foundation has been straightforward, and a true partnership. The Foundation’s staff is seasoned, professional, and shares our values. They are very approachable, very supportive, and often are a significant source of information, expertise, and connections, empowering us to further impact our shared goals.”*



*“All communication with the Foundation has been clear, effective, and timely. The processes are sometimes murky in terms of when we’ll be allowed to apply for what. But whenever we’re curious about anything, the Foundation is always very reachable and transparent.”*

## Helpful, Efficient Grantmaking Processes

- ▶ Grantees find Barancik’s application process to be exceptionally helpful – providing ratings that place the Foundation at the 100<sup>th</sup> percentile in CEP’s comparative dataset.
  - Grantees also provide higher than typical ratings for the extent to which Barancik’s application process is an appropriate level of effort given the funding received, and for the extent to which the Foundation is clear and transparent about process requirements, timelines, and whether an application is likely to be funded.
  - As one grantee writes, “Processes are easy to navigate, relevant, and reasonable.” Another grantee mentions, “Prior to any grant application, the priorities of the Foundation are clearly communicated and since any application is by invitation only, our organization is greatly supported when invited to apply for a grant cycle.”
- ▶ Similarly, grantees provide strong ratings for the helpfulness, relevance, adaptability, and straightforward nature of Barancik’s reporting process, placing the Foundation among the top three percent of funders in CEP’s dataset on these measures.
- ▶ The exchange of ideas that grantees have with Barancik during its processes likely supports grantees’ positive experiences. Eighty-three percent – a higher than typical proportion – indicate that they had an exchange of ideas with Barancik regarding how to assess the results of the work funded by the grant.
- ▶ In addition to being perceived as helpful, Barancik’s processes are efficient for grantees. Grantees spend 16 hours at the median on Barancik-required processes – less time than is typical – and receive a larger than typical dollar return for every hour they spend.
- ▶ Three of Barancik’s seven staff members are program staff – a typical proportion. It’s worth noting that these staff manage a higher than typical number of applications and grants and award more dollars on average per full-time employee.

## Strong Commitment to Underrepresented Groups with Some Differences in Grantees Experience

- ▶ Grantees recognize Barancik’s commitment to diversity, equity, and inclusion (DEI) and support for underrepresented groups. In particular, grantees’ ratings for their agreement that Barancik has clearly communicated about what DEI means for its work, demonstrates an explicit commitment to DEI and combatting racism, and that staff embody DEI place the foundation in the top 15 percent of funders in CEP’s dataset.
- ▶ In addition, 78 percent of grantees report that their funding was intended to benefit historically disadvantaged groups.
- ▶ CEP analyzes all responses by respondent demographic characteristics, including gender identity and person of color identity. While Barancik grantees’ experiences are overall strongly positive across all identities, the section below notes some differences.

### Gender Identity

- ▶ While still generally reporting more positive experiences than grantees at 75 percent of other funders in CEP's comparative dataset, ratings from Barancik grantees who identify as a woman (N=57) are significantly *lower* than those from grantees who identify as a man (N=20) on several measures, including: their perceptions of the Foundation's understanding of their local communities and the needs of the people and communities served, the Foundation's understanding of their organizations' goals and strategy, their agreement that the Foundation demonstrates an explicit commitment to DEI, and that the Foundation is committed to combatting racism.

### Person of Color Identity

- ▶ While still generally reporting more positive experiences than grantees at 50 percent of other funders in CEP's comparative dataset, ratings from grantees who identify as a person of color (N=11) are significantly *lower* compared to grantees who identify as not a person of color (N=64) on a few key measures, including: the Foundation's understanding of the grantees' local communities, awareness of challenges facing grantee organizations, and comfort approaching the Foundation if a problem arises.
  - Grantees who identify as a person of color are also more likely to initiate contact with the Foundation more frequently than the Foundation initiated with them, a pattern associated with less positive experiences fieldwide.
  - Grantees who identify as a person of color disproportionately represent smaller organizations with budgets of less than \$1MM, and receive significantly smaller and shorter grants with a lower dollar return on hours spent fulfilling administrative requirements.

## CEP Recommendations

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

- ▶ Celebrate the stellar ratings across the survey and reflect on which aspects of Barancik's values and approaches have contributed to grantees' exceptionally strong experiences.
- ▶ Build on Barancik's strong practice of providing non-monetary assistance to grantees and consider additional support where possible to align with grantees suggestions, in particular, around facilitating spaces for collaboration and convening. In addition, consider digging deeper to understand grantees' experiences with the Unite Us referral database prior to expanding its use.
- ▶ Where possible, identify approaches to build on support for first-time grantees to deepen mutual understanding of each other's goals, strategies, and contexts.
- ▶ Taking into account Barancik's approach to grantmaking, determine whether there is interest and/or capacity to increase the proportion of multiyear and unrestricted grants, particularly for grantees that Barancik intends to fund again in the future.
- ▶ While keeping in mind grantees' overall strongly positive experiences across identities, reflect on whether there might be additional opportunities to specifically support grantees who identify

as women and/or people of color. Facilitate internal discussions to identify any structural barriers that may contributing to differences.

- ▶ Considering program staff's relatively higher caseloads, reflect on how to maintain the high level of service that grantees currently receive, particularly as the Foundation considers responding to grantees' requests for additional and deeper engagement.

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