PROCESS AND GRANTEE SATISFACTION EVALUATION

PRESENTED TO:
WEINGART FOUNDATION

OCTOBER 2014

CASTER CENTER
FOR NONPROFIT AND PHILANTHROPIC RESEARCH
UNIVERSITY OF SAN DIEGO
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EXECUTIVE SUMMARY

This report provides findings from a program evaluation of Weingart Foundation’s 2014 Small Grants Program in San Diego County. The 2014 grant cycle was the fourth overall and the first cycle where funds were distributed through collaboration with the Jewish Community Foundation (JCF) in a new re-granting relationship called the JCF-Weingart Grant Program. The evaluation included an assessment of the grantmaking approach, applicants’ perceptions of the current operating environment and future trends, and feedback from program officers about the process of transitioning and operating the program under this new collaboration.

Overall, the evaluation found that the JCF-Weingart Grant Program is reaching its intended goals in the San Diego region by providing access to a countywide resource for unrestricted funding to small nonprofits and by promoting high standards for customer service in the grantmaking process. Additionally, the incorporation of the JCF in 2014 provided a local dimension that was greatly appreciated by the nonprofits applying for funds.

In 2014, a total of $668,000 was distributed to 60 nonprofit organizations in San Diego County. The majority of grants were for general operating funds (67%) and program development (27%), with some funds directed toward capacity building (5%) and capital expenditures (1%).

Summary of Key Findings

- This year’s grant pool was larger than in the past. Additionally, there were fewer Tier 3 Applicants (applicants that are clearly outside funding guidelines), indicating that the pool was better matched and, perhaps, that San Diego nonprofits are becoming more familiar with program grant guidelines.
- The addition of nine new Grantees (15%), a few of which were identified as direct referrals from JCF, helped extend the geographic reach of the grant program into new areas of the San Diego County, expanding the reach into low-income, underserved, and immigrant and refugee populations. Furthermore, Grantees reported an overall broader geographic reach than in past cycles. Half of Grantee programs were described as countywide.
- The goals of moving the fund to the JCF were largely achieved. Namely, nonprofit leaders responded positively to having a local entity managing the fund. New organizations were introduced to Weingart Foundation by the JCF and vice versa. Individual donors to the JCF have expressed interest in learning more about Weingart
Foundation grantmaking practices, including the due diligence process, to inform their own grantmaking.

- Collectively, the transition of the program to the JCF was smooth. Although there was little interruption to previous cycles in terms of customer service, JCF staff encountered a learning curve in regard to the due diligence process. However, effective communication with Weingart staff helped to successfully manage the change process. JCF staff also reported that they originally underestimated the staff time needed to complete the Weingart grantmaking process.
- There were no notable changes in customer satisfaction from previous evaluations. JCF-Weingart staff were viewed as extremely helpful and responsive.

**Conclusions and Recommendations**

The evaluation found that the stated goals and objectives of Weingart Foundation are being met through the collaboration established with JCF to manage the JCF-Weingart Grant Program in San Diego County. Grantees and Applicants report continued high levels of customer service and overall satisfaction with this new approach. The evaluation also gathered sufficient evidence to suggest that running the program through a local funder has helped to increase awareness about the program and its reach. Furthermore, comments provided by both Grantees and Applicants surveyed for this evaluation clearly demonstrate that Weingart Foundation funding continues to fill a challenging funding gap in San Diego County by providing access to countywide, unrestricted, general operating funds.

The evaluation identified some areas for process improvement. The evaluation report includes recommendations about improving the website and the online grant application, providing additional instructions on types of funding for which to apply, creating a feedback mechanism on the website, and improving clarity about reporting requirements. Should the program continue to function under the JCF umbrella, both parties should discuss future staffing and budgeting for the program. Additionally, although the program extended its grantmaking into new communities, there is still room to expand geographic reach, particularly in the areas of East and South San Diego County.
Background

After three cycles of direct grantmaking in San Diego County, Weingart Foundation elected to enter into a re-granting partnership with the Jewish Community Foundation (JCF) in August 2013. Under this partnership, JCF managed all program outreach and communication, application review, funding decisions, and fund distribution through a special fund called the JCF-Weingart Grant Program. It was decided that there would be one pilot grant cycle and that the process would be formally evaluated. Weingart Foundation expressed the following goals for the program:

- Strengthen program outcomes by grounding the program in a foundation with local expertise, extensive grantmaking history and relationships.
- Maintain the consistency of funding and of all program goals, grant guidelines and policies.
- Provide local nonprofits and grantmakers exposure to the Weingart grantmaking approach of responsive, unrestricted, countywide funding.
- Honor a longstanding Weingart Foundation history of commitment to the nonprofits of San Diego County.

RESEARCH APPROACH

To assess the extent to which the aforementioned goals were met, the Caster Center for Nonprofit and Philanthropic Research (Caster Center) at the University of San Diego was retained to conduct both a process and grantee satisfaction evaluation. The Caster Center team worked closely with staff members from both Weingart Foundation and the Jewish Community Foundation (JCF) to study the JCF-Weingart Grant Program. The purpose of this evaluation was to provide both foundations with information about the 2014 grantmaking cycle, how it functioned, how it was perceived, and how it might be improved. This comprehensive evaluation was designed to address the following questions:

1. What is the profile of the applicants (both grantees and those who were denied) in the most recently completed full cycle of grantmaking?

2. What did applicants to the JCF-Weingart Grant Program (both grantees and those who were denied) think about the process?
3. How effective are current outreach methods?

4. What does the distribution of grants look like in San Diego by amount, organizational type, and communities served?

5. What other sources of unrestricted funding do applicants access in addition to those provided through the program?

6. How do the findings from this cycle compare to previous cycles in San Diego? Are there notable trends emerging or important discrepancies to note? Have there been improvements in recommended areas?

7. What lessons were learned from a staff perspective?

8. Have applicants or staff noticed any change in local funder practices/policies as a result of the JCF-WF grantmaking approach?

9. For returning applicants, how (if at all), has the process differed from previous cycles which were managed directly by Weingart Foundation?

10. Do returning applicants have any suggestions and/or recommendations for how to improve the application and/or the review process?

The evaluators used a mixed-methods approach to gather data for the evaluation. The first phase of this evaluation consisted of a comprehensive online survey of all organizations that applied to the JCF-Weingart Small Grants program (SGP) in 2014. The survey was based largely on the instrument originally developed by Ruth Brousseau, Principal, Learning Partners, and later adapted by the Caster Center to evaluate the first three cycles of Weingart Foundation’s SGP. Appropriate adaptations were made to reflect the new re-granting arrangement with JCF.

As with the previous evaluations, two different versions of the survey were used to capture customer feedback. One version was sent to Grantees (i.e., those that received funding) and another version was sent to Applicants (i.e., those that applied but were denied funding). Throughout the remainder of this report the term “Applicant” will be used to refer to those organizations that were not funded.

The survey was administered during July 2014. Potential participants each received one email and up to three reminders requesting participation in the evaluation. The evaluators made follow-up phone calls to all Grantees that had not responded after three emails to ensure that they had actually received the email. It was decided by the evaluators and staff of the JCF-Weingart
program that it would be inappropriate to make follow-up phone calls to Applicants. Leaders from 87 out of the 134 nonprofits responded to the survey, yielding an overall response rate of 65%. This response rate was higher for Grantees (90%) than Applicants (45%). These response rates are similar to the response rates from the previous evaluation (96% for Grantees; 40% for Applicants). Weingart Foundation and the Jewish Community Foundation received aggregate data from the survey; no responses or comments were attributed to specific individuals and/or organizations.

The second phase of this evaluation consisted of qualitative interviews with Sharyn Goodson, Vice President of Philanthropy at the Jewish Community Foundation and Janine Mason, Consulting Program Officer at the Jewish Community Foundation. Interviews included questions about lessons learned through the process of moving the program to JCF and as a result of managing the first cycle.

Data collected by JCF during the grant application process covered five main categories: financial, staffing, governance, type of organization, and number of adults and/or children served were also assessed. These data were analyzed to first create a general profile of all 134 nonprofit that applied to the program (Grantees and Applicants) and then to compare the groups.
OVERVIEW OF ALL APPLICATIONS TO THE 2014 GRANTMAKING CYCLE

This section of the report provides a profile of all nonprofits that applied for funding during the 2014 grantmaking cycle, a description of the kinds of grants requested, and a description of the grants that were funded. In 2014, 134 nonprofits applied to JCF-Weingart for funding. As Figure 1 shows, 45 percent of the nonprofits that applied to JCF-Weingart were approved for funding.

Figure 1. Grantees and Applicants

![Diagram showing the percentage of approved and denied grantees](image)

Profile of Grantees and Applicants

As Table 1 demonstrates, pool of Grantees looks fairly similar to the overall population of nonprofits in San Diego with budgets $1.5 million or less. There was a higher percentage of Grantees from human service agencies and, on the other hand, a higher percentage of Applicants from arts and culture and health organizations. Weingart Foundation focus areas naturally increase the number of Grantees in the Human Services and Health categories. Additionally, the Grantees in the Arts and Culture category are those that are providing educational programs that meet Weingart Foundation grant guidelines for serving low-income populations.
Table 1. Type of Organization: Applicants and Grantees

<table>
<thead>
<tr>
<th>Type of Organization</th>
<th>Applicants</th>
<th>Grantees</th>
<th>Percent of Nonprofits in San Diego with Budgets $1.5M or less*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arts and Culture</td>
<td>19%</td>
<td>12%</td>
<td>9%</td>
</tr>
<tr>
<td>Education</td>
<td>11%</td>
<td>13%</td>
<td>14%</td>
</tr>
<tr>
<td>Environment and Animals</td>
<td>4%</td>
<td>0%</td>
<td>4%</td>
</tr>
<tr>
<td>Health</td>
<td>15%</td>
<td>12%</td>
<td>5%</td>
</tr>
<tr>
<td>Human Services</td>
<td>35%</td>
<td>43%</td>
<td>23%</td>
</tr>
<tr>
<td>International</td>
<td>1%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Mutual, Public, and Societal</td>
<td>11%</td>
<td>13%</td>
<td>22%</td>
</tr>
<tr>
<td>Religion</td>
<td>4%</td>
<td>5%</td>
<td>20%</td>
</tr>
</tbody>
</table>

Data Source: Caster Center 2014 State of Nonprofits Annual Report

Table 2 presents the financial profile of Grantees and reflects the grant guidelines of the JCF-Weingart Grant Program, which prioritizes grantmaking to nonprofit organizations with less than $1.5 million in annual revenue. Overall, Grantees were more likely to be larger organizations with larger budgets and more assets than Applicant organizations.

The Applicant profiles described in Tables 2 and 3 include both large and small size outliers that somewhat skew the data. In particular, there were three programs that applied for funding that were housed within nonprofits with budgets well in excess of $1.5 million. While none of these nonprofits received funding, their descriptive data are still reflected in the Applicant profile.

Table 2. Income and Expenses: Applicants and Grantees

<table>
<thead>
<tr>
<th>Type</th>
<th>Income</th>
<th>Expenses</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Applicants</td>
<td>Grantees</td>
</tr>
<tr>
<td>Median</td>
<td>$281,624</td>
<td>$536,750</td>
</tr>
<tr>
<td>Range</td>
<td>$2,100 - $138,769,400</td>
<td>$45,434 - $1,473,212</td>
</tr>
<tr>
<td></td>
<td>$55,692 - $1,503,736</td>
<td>$126,175,800</td>
</tr>
</tbody>
</table>

Table 3. Total Assets Applicants vs. Grantees

<table>
<thead>
<tr>
<th>Type</th>
<th>Assets</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Applicants</td>
</tr>
<tr>
<td>Median</td>
<td>$175,393</td>
</tr>
<tr>
<td>Range</td>
<td>$0 - $225,993,100</td>
</tr>
</tbody>
</table>
Tables 4 and 5 reveal that Grantees tended to have larger boards that met slightly less frequently, but that both donated and fundraised more successfully (in terms of dollars raised) than the boards of Applicant organizations.

**Table 4. Board Governance: Applicants and Grantees**

<table>
<thead>
<tr>
<th></th>
<th>Number of Board Members</th>
<th>Number of Board Meetings Per Year</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Applicants</td>
<td>Grantees</td>
</tr>
<tr>
<td>Median</td>
<td>9</td>
<td>11</td>
</tr>
<tr>
<td>Range</td>
<td>3 - 37</td>
<td>4 - 23</td>
</tr>
</tbody>
</table>

**Table 5. Board Fundraising: Applicants and Grantees**

<table>
<thead>
<tr>
<th></th>
<th>Number of Board Members that Donate</th>
<th>Total Board Contribution</th>
<th>Total Board Contribution Plus Fundraising</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Applicants</td>
<td>Grantees</td>
<td>Applicants</td>
</tr>
<tr>
<td>Median</td>
<td>8</td>
<td>9</td>
<td>$5,650</td>
</tr>
<tr>
<td>Range</td>
<td>0 - 36</td>
<td>0 - 23</td>
<td>0 - $90,693</td>
</tr>
</tbody>
</table>

As can be seen in Table 6, Grantees tended to employ slightly more staff members and, in general, utilized more volunteers than Applicants (likely reflecting the fact that Grantees tended to be larger organizations).

**Table 6. Staffing: Applicants and Grantees**

<table>
<thead>
<tr>
<th></th>
<th>Full-Time Staff</th>
<th>Part-Time Staff</th>
<th>Volunteers</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Applicants</td>
<td>Grantees</td>
<td>Applicants</td>
</tr>
<tr>
<td>Median</td>
<td>2</td>
<td>5</td>
<td>2</td>
</tr>
<tr>
<td>Range</td>
<td>0 - 20</td>
<td>0 - 21</td>
<td>0 - 59</td>
</tr>
</tbody>
</table>

Table 7 shows that Grantees served slightly more adults and slightly fewer children than Applicant organizations. Grantees also tended to have two or more sites, a fact probably correlated with organizational size.

**Table 7. Adults and Children Served: Applicants vs. Grantees**

<table>
<thead>
<tr>
<th></th>
<th>Number of Adults Served</th>
<th>Number of Children Served</th>
<th>Number of Sites</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Applicants</td>
<td>Grantees</td>
<td>Applicants</td>
</tr>
<tr>
<td>Median</td>
<td>756</td>
<td>800</td>
<td>500</td>
</tr>
<tr>
<td>Range</td>
<td>0 - 215,000</td>
<td>0 - 500,000</td>
<td>0 - 289,500</td>
</tr>
</tbody>
</table>
Profile of Grant Requests

Amounts requested ranged from $2,500 to $25,000. However, requests tended to be for larger amounts; 83 percent of requests were for $15,000 or more and 47 percent of requests were for $25,000 (the full amount allowable under the grant guidelines). The average grant request was $19,384 and the median grant request was $20,375.

As Figure 2 shows, the majority of requests were for general operating support (67%) or program development (27%). A few requests were for capacity building (5%) and only one (.7%) was for capital funding.

Figure 2. Request for Funds by Type of Support

Upon reviewing applications, the JCF-Weingart Grant Program team followed past program practice and ranked applicants according to tiers given the large applicant pool. Tier 1 was reserved for competitive applications. Tier 2 was designated for organizations that met basic threshold qualifications for funding but, for a variety of reasons, were deemed less competitive. Tier 3 was reserved for applications that clearly fell outside of the grant guidelines.

In the 2014 cycle, 70 (52%) applicants were ranked as Tier 1, 37 (28%) were ranked as Tier 2, and 27 (20%) were ranked as Tier 3. The difference between the number of applications that fell into the first tier compared to the second and third tiers was similar to previous grantmaking.
cycles in San Diego, except that there were more applications in Tier 3 compared to Tier 2 in previous cycles. This finding suggests the nonprofits that applied to the JCF-Weingart fund in 2014 were a better fit than in previous cycles and, thus, the pool was more competitive.

Profile of Grantees

The 60 nonprofits that received funding in the 2014 grants cycle received a combined total of $668,000 in grants.1 As can be seen in Table 8, grant amounts ranged from $6,500 to $16,000, with the majority of grants made at the $10,000 level. While the program generally seeks to make grants averaging $15,000, doing so proved challenging because of the competitiveness of the cycle.

Table 8: Awards by Amount Granted

<table>
<thead>
<tr>
<th>Award Amount</th>
<th>Number of Awards</th>
<th>Amount Granted by Award Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>$6,500</td>
<td>1</td>
<td>$6,500</td>
</tr>
<tr>
<td>$7,500</td>
<td>1</td>
<td>$7,500</td>
</tr>
<tr>
<td>$10,000</td>
<td>44</td>
<td>$440,000</td>
</tr>
<tr>
<td>$15,000</td>
<td>10</td>
<td>$150,000</td>
</tr>
<tr>
<td>$16,000</td>
<td>4</td>
<td>$64,000</td>
</tr>
<tr>
<td>Total</td>
<td>60</td>
<td>$668,000</td>
</tr>
</tbody>
</table>

Figure 3 shows that the majority of 2014 grants awarded were for general operating support (80%). Grants were also awarded for program development (17%) and capacity building (3%).

Figure 3: Grants Awarded by Type of Support

1 Sixty-two nonprofits were originally awarded; however, funding was later evoked from two nonprofits. This report considers as Grantees only those nonprofits which received funding.
Four nonprofits received grants for the exact amounts requested. The remaining grants were made in amounts smaller than requested. The difference between amount requested and amount received varied by Grantee and ranged from $1,000 to $17,500, with a mean difference of $10,221. For most Grantees, the difference tended to be more than $10,000; 66 percent of Grantees received between $10,000 and $17,500 less than what was originally requested.

SURVEY FINDINGS

As was previously mentioned, participants in the evaluation were asked to respond to a survey designed either for Grantees or Applicants. In the following section of the report, survey responses are presented and analyzed. Responses that are markedly different from previous evaluations are noted.

Profile of Survey Respondents

Respondents were primarily executive directors (48%), grantwriters (19%), and development directors (15%). Remaining respondents included administrative directors, program coordinators, chairpersons, founders, and administrative assistants. Grantees were more likely than Applicants to have a development director complete the survey. Applicants, on the other hand, were more likely than Grantees to have a grantwriter complete the survey.

Fiscal Health

In regard to the budget for the current fiscal year, Grantees reported a slightly healthier fiscal picture than in the previous evaluation. For example, 90 percent of Grantees and 80 percent of Applicants expected to have at least a break-even budget for this current fiscal year. Ten percent of Applicants did not know whether the organization planned to have an at least break-even budget for the year, which may be a reflection of the respondent’s position in the organization (i.e., more grantwriters than development directors).

Both Grantees and Applicants expressed cautious optimism about their financial futures. Figure 4 shows that 60 percent of both groups expected the current fiscal year to be equally financially challenging as last year. More Applicants (27%) than Grantees (19%) expected the current fiscal year to be less financially challenging than last year.
Figure 4: Financial Outlook of Current Fiscal Year Compared to Prior Fiscal Year

Although not depicted in Figure 4, the financial outlook reported on the 2014 survey is more positive than the in the evaluation of previous grantmaking cycles (In the previous evaluation, 35 percent of grantees and 36 percent of applicants expected the current year to be more challenging than the previous.) These findings align with ongoing research conducted by the Caster Center which documents an increasingly positive future financial outlook expressed by nonprofit leaders.

One important measure of financial health is liquidity, or the amount of unrestricted operating cash held by the organization at any given time. As Figure 5 indicates, respondents’ organizations were operating at varying levels of liquidity.
Figure 5: Months Unrestricted Operating Cash

It is worth noting there has been some improvement in this area that is consistent with research about the overall nonprofit sector in San Diego and throughout California. As nonprofits emerge from the Great Recession, their financials are stabilizing and improving. In the previous grantmaking cycles, approximately half of both Applicants and Grantees had three months or less of operating reserves. Current data indicate that, for Grantees at least, more organizations reported higher levels of operating reserves. Data for Applicants are less conclusive, given the high number of “Don’t Know” responses.

Funding Needs

Both Grantees and Applicants ranked their organizational funding needs in the following order:

1. Unrestricted Funding   
2. Capacity Building   
3. Program Development   
4. Capital Improvements

As can be seen in Figure 6, the two groups pursue multiple sources of funding and that the majority of unrestricted funding for both groups comes from individual donors and special events. This finding is a good illustration of the gap in foundation funding for unrestricted operating and capacity building funds in San Diego that the JCF-Weingart fund has been
designed to address. In comparing these data to previous evaluations, it appears that unrestricted funding received by survey respondents from almost all of these sources has decreased.

Figure 6: Sources of Unrestricted Funding

The willingness to provide general operating support is what sets the JCF-Weingart Small Grants Program apart and, for many organizations, is tremendously helpful. One Grantee wrote, “As a small organization, I am grateful to the foundation for their support in the area of GOS.” Another Grantee wrote, “Thank you for the opportunity to deepen and improve the work we are doing - for not requiring an ‘innovation’ when something is already working very well.”

Government Funding

The majority of both Grantees and Applicants (64% and 67% respectively) receive 20 percent or less of their budget from government funds. Thirteen percent of Grantees and 14 percent of Applicants received more than 50 percent of their budget from government funding sources. Again, these data are similar to previous grant cycles.
Effectiveness of Current Outreach Methods

Outreach Strategies

JCF used a number of different outreach strategies to publicize the JCF-Weingart Grant Program. These included posting information on websites, conducting outreach events, and sharing information through networks such as other foundations and professional associations. Most Applicants and Grantees heard about the program through more than one source. As Figure 7 illustrates, the five most effective outreach strategies for the 2014 grant cycle were 1) Weingart Foundation website, 2) having been a previous Applicant, 3) the JCF Website, 4) a JCF Outreach Event, and 5) word of mouth.

Figure 7: Ways Applicants and Grantees Learned about the Small Grant Program

The ways in which both Grantees and Applicants learned about the program are similar; however, the ways in which they first heard about the program—i.e., the first point of contact—varied somewhat. For example, the majority of both Grantees and Applicants (65% and 52% respectively) first heard about the JCF-Weingart Small Grant program because they were previous Applicants, or through the Weingart Foundation website (13% of Grantees and 18% of Applicants). Eighty-seven percent of Grantees (n=52) and 43 percent of Applicants (n=32) had applied for a grant in previous cycles.
Making the Decision to Apply
There are many factors that contribute to the decision whether to apply for the JCF-Weingart Grant Program. The most important factors that respondents considered were the fit of the nonprofit’s program area and the potential access to unrestricted operating funds.

Top Reasons Grantees Applied:

1. Focus is on our program area
2. Access to unrestricted operating funds
3. Encouraged by JCF
4. Good match for the organization

The reasons Applicants decided to apply were similar to the reasons Grantees decided to apply. However, it is interesting to note that Grantees were more likely than Applicants to decide to apply because they wanted to start a relationship with the JCF. This finding is consistent with the previous evaluation that found Grantees were also more interested in relationship building than Applicants. As was noted in the 2013 evaluation report issued by the Caster Center, it is possible that agencies looking to build a relationship with Weingart Foundation and/or JCF are more likely to invest in understanding the funding priorities and grant guidelines, and perhaps are more likely to call for assistance in applying – which ultimately helps them to be more competitive in the grantmaking process.

All (100%) of Grantees and 90 percent of Applicants plan to reapply for future grants.

Preferred Outreach Method
While there are many different ways to communicate with nonprofit staff, 100 percent of Grantees and 97 percent of Applicants indicated that email was the best way to outreach to them. The second most preferred outreach method was e-newsletters, followed by postal mailings.
Efficiency of Application Process

“The Weingart/JCF grant process is one of the best I have seen. Communication is professional and respectful.”

Time Spent on Application

The majority of respondents reported that the application process took less than ten hours to complete. However, Applicants report spending significantly more time on the grant application than Grantees (see Table 9).

Table 9: Number of Hours Spent on Grant Application

<table>
<thead>
<tr>
<th></th>
<th>Grantees</th>
<th>Applicants</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 - 4 hours</td>
<td>32%</td>
<td>15%</td>
</tr>
<tr>
<td>5 - 9 hours</td>
<td>46%</td>
<td>44%</td>
</tr>
<tr>
<td>10 - 14 hours</td>
<td>18%</td>
<td>26%</td>
</tr>
<tr>
<td>15 hours or more</td>
<td>4%</td>
<td>15%</td>
</tr>
</tbody>
</table>

Almost all (98%) Grantees and (93%) Applicants indicated they felt the effort spent on the grant proposal was appropriate to the size of the grant for which they were applying. One Grantee expressed that grantwriting is expensive, stating that it cost the organization $450 to pay for the grantwriter’s time. However, another Grantee pointed out that the effort expended on grantwriting can serve a larger purpose: “The most time-consuming part is the board giving and ‘sphere of influence piece’ but it's also an exercise that is helpful for other purposes within the organization.”

Clarity of Application Process

The majority of both Applicants (71%) and Grantees (87%) agreed that once they had decided to apply for a grant, the application process was clear. However, as is shown in Figure 8, more than one out of ten Applicants (16%) and Grantees (12%) did not feel that the information on the website was clear.
Figure 8: Participants’ Perspectives: Information on the Website Was Clear

Based on several written comments, it appears that the lack of clarity was largely the result of confusion around what type of support for which the organization should apply. For example, one Applicant wrote, “Based on the website we applied for general operating expenses. During the follow up discussions we were told that we should have applied for capacity building. The distinction was not clear on the website and we lost the grant because of applying in the wrong area.”

The evaluator followed up with Sharyn Goodson at JCF to get her perspective on these comments. Sharyn explained that this was likely an unintended consequence of being extremely transparent with Applicants about the reason for their rejection. Simply put, because of the large pool of competitive applications, there was less flexibility than in previous cycles to move organizations from one category to another or to pull organizations up from Tier 2 into Tier 1. In some cases, organizations were told that applying in a different area for support may have made them more competitive. This was especially true for organizations that had applied for general operating support, but, because of what was written in the narrative, it was obvious that the support was for a specific program. In some of these cases the applications were not as competitive in the general operating category as they could have been in a program specific category. While this information was given as something for the organization to consider in the future to be competitive, as the comments reflect, it caused some confusion and/or frustration.

Several Grantees indicated that attending the workshop helped tremendously. “It was only clear because we attended the workshop about how to fill out the application. I don't know if we would have known so well how to answer the questions had we not attended the workshop.” Another Grantee wrote that, “After attending the grant application workshop, no further clarification was necessary.”
Grantees were also asked if the reporting requirements were made clear. Eighty-one percent of Grantees agreed that the reporting requirements were made clear, 11 percent disagreed, and eight percent were neutral. Although the level of agreement is high, it is lower for this question than all other questions.

**Accessing the Website**

As previously mentioned, the website was one of the most effective outreach strategies utilized to share information about the grants program, as well as a tool for organizations to determine whether and how to apply. Both Grantees and Applicants agreed that the website was clear, useful, and a helpful tool. Overall, Grantees were slightly more positive than Applicants about the utility of the website (see Figure 9).

Several Applicants indicated it would have been helpful to have a save function for the online application, allowing them to return at a later date to complete the application. One Applicant suggested that a PDF or Word document of the application be available for downloading.

**Figure 9: Participants’ Perspectives on Usefulness of Website**

![Figure 9: Participants’ Perspectives on Usefulness of Website](image)

**Interaction with Program Staff**

Interaction with program staff prior to submitting the grant application can help clarify expectations and ensure that the application is a good match for the JCF-Weingart Grants Program. As can be seen in Figure 10, slightly more Grantees than Applicants reported contact with program staff.
Figure 10: Participant Contact with Program Staff Prior to Submitting Grant

For both Applicants and Grantees, most of the contact with program officers prior to applying for a grant lasted 10 minutes or less, although Grantees generally reported speaking for longer periods of time. This finding illustrates the importance of communication and relationship building between funder and grantee. All (100%) of survey respondents that were familiar with this part of the application process indicated that program officers responded in a timely manner.

In comparison to previous grant cycles, it appears both Grantees and Applicants had less contact with staff prior to submitting the application. For example, in earlier cycles, 48 percent of Grantees and 17 percent of Applicants reported speaking with a program officer for more than 15 minutes. In 2014, 20 percent of Grantees and no (0%) Applicants spoke with a program officer for more than 15 minutes. There are two potential explanations for this difference. First, in the 2014 cycle, staff offered an in-person grant applicant workshop to potential applicants. This workshop was reviewed favorably by survey respondents, and may have provided a timesaving alternative to one-on-one phone calls. Second, 85 percent of Grantees and 31 percent of Applicants had previously received a grant through the Weingart Small Grant Program, indicating there was already some degree of familiarity with the process on the part of potential applicants and therefore, perhaps, less need to speak directly with program officers.

Grantees’ Experience

Following the application period, potential Grantees had additional opportunities to interact at greater length with program officers. Overall, this interaction was described as positive, with Grantees reporting that the program officer took the time to conduct a thorough review, asked appropriate requests, and tried to understand the needs of the nonprofit. Table 9 presents findings from specific questions asked of Grantees about interaction with program officers.
Table 10: Grantees’ Experience of Interaction with Program Officers

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>100%</td>
<td>I felt the program officer spent an adequate amount of time getting to know our organization and learning about our organization's needs.</td>
</tr>
<tr>
<td>100%</td>
<td>The review was thorough.</td>
</tr>
<tr>
<td>100%</td>
<td>I felt the program officer's questions were appropriate.</td>
</tr>
<tr>
<td>100%</td>
<td>I felt the program officer developed a solid understanding about our request.</td>
</tr>
<tr>
<td>98%</td>
<td>I feel comfortable approaching the JCF if I problems arise during the grant period.</td>
</tr>
<tr>
<td>94%</td>
<td>JCF staff responded to our questions in a timely manner.</td>
</tr>
</tbody>
</table>

In general, Grantees indicated having had positive experiences with program staff. “It's always a pleasure working with the program officers- I know they are inundated with requests.”

Applicants’ Experience

Despite being denied funding, Applicants found the overall process to be both fair and respectful. Specifically, 77 percent of Applicants felt the process was respectful or very respectful of them, 19 percent were neutral (neither respectful nor disrespectful) and no one (0%) felt the process was disrespectful. Several organizations provided constructive feedback via written comments. One organization was disappointed that they did not know the grant deadline had been moved. The original deadline was inadvertently scheduled on Martin Luther King Jr. holiday, and therefore moved. Another organization believed they were denied because of the small size of their budget. The respondent wondered, “I am not sure if they realize our efficiency with a staff of one and a small budget. We are over 20+ years old and I felt that they thought our budget was too small for the work that we do. All volunteer…Very cost effective.”

One-half (53%) of Applicants reported that the process was somewhat or very fair, 17 percent said it was neither fair nor unfair, seven percent said it was either somewhat or very unfair, and 23 percent did not know.

Applicants were also asked about their experience when following up with program officers after they received notice that funding was denied. (Please note, an invitation to call the Foundation for feedback on declined applications was in the declination letter.) At the time of the survey (which launched almost immediately after award and denial notifications had been sent), 55 percent of Applicants chose to follow up with program officers to inquire about the reasons for denial. For those that did follow up, 63 percent indicated that the reason for denial was clear; the rest did not know (indicating, potentially, that they (the survey respondent) were not the staff

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2 While this comment reflects the perceptions of this Applicant, it is not the policy of Weingart Foundation or the JCF-Weingart Grant Program to deny an organization based on organizational size or being “all volunteer.”
member that initiated the follow up). Several Applicants indicated they still intend to follow up, and the JCF-Weingart program staff report they have already had substantive calls with 38 organizations that did not receive funding.

**DISTRIBUTION OF GRANTS**

Distribution of Grantee Organizations

Grant requests were received from organizations with headquarters in 17 different cities within San Diego County and one city within Orange County (the request was for a program operated in San Diego County). The geographic distribution of the nonprofits that participated in the JCF-Weingart Grant Program is presented in Appendix A, along with a comparison to the overall distribution of nonprofits working in Weingart Foundation priority areas, as well as with the poverty level in each community. In summary, the majority (70%) of requests were received from within the city of San Diego. No applications were received from nonprofits headquartered in the cities of Coronado, Del Mar, Imperial Beach, Lemon Grove, or Santee. Of these, Imperial Beach, Lemon Grove, and Santee could be targeted for additional outreach as they are home to nonprofits that serve low-income, at-risk, and immigrant populations.

Appendix B presents the areas outside of the city that Grantees reported as being served by Grantee nonprofits in 2014 as well as 2013. While results should be interpreted cautiously, approximately half of Grantees in all cycles reported providing countywide services. Additionally, programmatic reach seems to be expanding, with higher percentages of Grantees reporting providing services in individual cities than in previous evaluations.

New Grantees

Nine Grantees from the 2014 cycle had not previously received funding. Several of the new organizations were a direct result of referrals from JCF. Appendix C summarizes the areas where the organizations were located throughout San Diego.

With the addition of these nine new grantees, Weingart Foundation has increased its geographic scope and its reach into at-risk populations in San Diego. Geographically, the new grantees include organizations located in, or working with, low-income, underserved communities in the city of San Diego, Pacific Beach, Solana Beach, Sorrento Valley, Sierra Mesa, and in North County across the Highway 78 corridor including the cities of Carlsbad, Oceanside, Vista, San

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3 The 2013 sample included three different grantmaking cycles (n=94), whereas the 2014 sample included just one cycle (n=54).
Marcos, and Escondido. Furthermore, while on the surface it would appear that areas such as Solana Beach and Sorrento Valley are wealthier than the mid-City areas and therefore, perhaps, less in need of grant dollars, the evaluation found that the new Grantees in these areas are serving niche populations of often overlooked low-income and/or at-risk individuals.

The nine new Grantee organizations serve a wide range of populations including Middle Eastern, Burmese, and Sudanese refugees, and East African and Iraqi immigrants. It is also worth noting that several Grantees are supporting low-income youth and families. Additionally, at least one new Grantee reported working specifically with immigrant and refugee families across North County. This finding is interesting because refugees are often thought of as residing primarily in the metro areas of San Diego and, as a result, grant dollars for refugee services tend to be targeted at that part of the county. We believe this finding provides additional evidence that the JCF-Weingart Grant Program is meeting its intended goals of reaching underserved populations in San Diego County. Moreover, the addition of services provided by new Grantees and the geographic expansion of services reported in Appendix B fulfills part of the recommendation made in our 2013 evaluation report to increase geographic scope of grants made by focusing on eastern regions of the County, including parts of El Cajon, Santee, and Escondido. It is recommended that outreach continue to be conducted in the eastern and southern regions of the County to continue to expand the reach of Weingart Foundation.

**Distribution of Grants by Subsector**

As can be seen in Table 10, the distribution of total applications received from each subsector (i.e., NTEE code) closely reflects the total population of nonprofits in San Diego. The major difference is that the JCF-Weingart population is underrepresented in the area of education, one of the JCF-Weingart SGP’s core focus areas. This is because that overall category of nonprofits includes many kinds of education nonprofits, such as PTAs and school groups that are not eligible under the JCF-Weingart Grant Program guideline.

The subsector profile of Applicants compared to Grantees differed slightly. Applicants were more likely to be arts and culture and health organizations, whereas Grantees were more likely to be human service agencies.
Table 11: Distribution of Grants by Subsector

<table>
<thead>
<tr>
<th>Subsector</th>
<th>Grantees &amp; Applicants</th>
<th>Grantees</th>
<th>Applicants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arts and Culture</td>
<td>16%</td>
<td>12%</td>
<td>19%</td>
</tr>
<tr>
<td>Education</td>
<td>12%</td>
<td>13%</td>
<td>11%</td>
</tr>
<tr>
<td>Environment and Animals</td>
<td>2%</td>
<td>0%</td>
<td>4%</td>
</tr>
<tr>
<td>Health</td>
<td>13%</td>
<td>12%</td>
<td>15%</td>
</tr>
<tr>
<td>Human Services</td>
<td>39%</td>
<td>43%</td>
<td>35%</td>
</tr>
<tr>
<td>International</td>
<td>1%</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td>Mutual, Public, and Societal Benefit</td>
<td>12%</td>
<td>13%</td>
<td>11%</td>
</tr>
<tr>
<td>Religion</td>
<td>4%</td>
<td>5%</td>
<td>4%</td>
</tr>
</tbody>
</table>

**APPLICANT AND GRANTEE FEEDBACK**

Both Applicants and Grantees were given an opportunity to offer suggestions and feedback about how to improve the application and/or review process.

Sample of Suggestions Received:

- Move the deadline so it does not fall during peak holiday/vacation time
- Add a save-and-return function to the online application*
- Make the online application available to Applicants post-submission
- Allow a more extensive application so organizations can fully tell their story
- Ensure JCF staff are on the same page in recommendations made to potential Grantees
- Offer a quicker turnaround time on grant decisions
- Offer more post-decision engagement, including feedback to Applicants about why organizations were denied (or, if currently available, make this option more explicit)*

* indicates suggestion was offered by more than one person

Several smaller, community-based organizations expressed some frustration that seemed to stem from a lack of experience in working with foundations on the part of the nonprofit. For example, one Applicant wrote, “*Even though the grant process was fair, our proposal was not funded for a very minor reason which could have been resolved by a phone call or email to clarify the issue. My recommendation would be both Applicant and JCF need to build [a] professional relationship to help capture any small issue before denying the grant…”* This organization proceeded to provide their website and social media sites presumably so that the foundation...
might follow up. It is unclear if Applicants fully understand it is also their responsibility as an Applicant to build such a professional relationship. Given this, it is recommended that the JCF and/or Weingart Foundation websites continue to provide information about the ways nonprofits can work with the foundation during the grantmaking process (e.g. asking questions or providing updates to an application) and to emphasize that open dialogue between the foundation and grantees is very welcomed.

Several organizations could think of no improvements that needed to be made.

For example, one wrote, “The process was so organized and thorough we have no suggestions. Thank you!”

**JCF – WEINGART GRANT PROGRAM: STAFF PERSPECTIVES**

To learn more about the process, the two primary staff associated with the JCF-Weingart fund, Sharyn Goodson, Vice President, Philanthropy at JCF and Janine Mason, Consulting Program Officer, were interviewed. They were asked to share their observations about what worked well and to discuss any challenges that arose during the process. Furthermore, each were given an opportunity to make recommendations for improving the process in the future.

Both Sharyn and Janine noted that the process of transitioning the fund was a positive experience. In particular, it was noted that people seemed to understand the nature of the change and nonprofit leaders were observed to see it more as an administrative change rather than something about which they should be overly concerned. In fact, as the findings from the survey suggest, many nonprofit leaders welcomed the involvement of a local funder. The smooth transition of the program was aided by several community outreach events. These events served as a tool for letting new people know about program as well as to advise previous applicants about changes to the program. Janine characterized these forums as an additional opportunity for JCF staff to observe and learn more about the Weingart grantmaking approach.

Sharyn described the process from the internal JCF perspective. First and foremost, Sharyn pointed out that the partnership was successful because Weingart staff were responsive and helpful throughout the transition. In fact, all issues she reported in the interview had already been addressed directly with Weingart Foundation staff. Good communication and suggestions from Janine allowed issues to be resolved efficiently. Sharyn noted that there was a natural learning curve for JCF as they worked to familiarize themselves with the Weingart philosophy.
and process of grantmaking, in particular, the due diligence process. However, she also noted that this learning was welcomed and has served to inform grantmaking practices at JCF. For instance, donors have asked her for copies of the due diligence documentation form to use as a guide from which to work in their own grantmaking.

Sharyn noted there have been other positive benefits for JCF as a result of this new grantmaking relationship. For example, making grants through this fund has provided an opportunity to raise awareness at JCF about the work of different small nonprofits in San Diego with whom JCF did not have a previous relationship. As a result, Sharyn has already introduced several JCF donors to JCF-Weingart Grantees who are working in areas of similar interest.

Both women discussed challenges with the website. Specifically, the application could not be saved, thus requiring applicants to complete it in one sitting. Additionally, there was no receipt generated at the time of the grant submission which became problematic when one or two organizations said they had applied but no record of a grant application could be found. When these issues arose, they were dealt with quickly and with a high level of customer service. Sharyn reported that there are plans in place to ensure that future applications may be saved while in process. A feature has already been added to the website so that once an application is submitted, a verification email is sent to the applicant.

In terms of future changes to the program, Sharyn and Janine had very few recommendations. This is likely the result of receiving feedback, learning, and making corrections throughout the transition and implementation process. Sharyn also indicated that future changes to the program will be considered after review of this evaluation. Sharyn mentioned that JCF had not fully realized the level of staff time that would be required to implement due diligence, especially the phone interviews. Going forward this may need to be addressed as part of the overall budget for the program.

**BROADER CHANGE**

As with the previous evaluation, it may still be too early to document broader changes to the grantmaking environment in San Diego that can be directly attributed to the presence of Weingart Foundation in the County. In the survey, Grantees (only) were asked if they had observed any changes in the policies or practices of local funders as a result of the JCF-Weingart Foundation Grantmaking approach. Most Grantees either had not observed any changes (52%) or didn’t know if any changes had occurred (46%).
However, as was discussed in the previous section, the program is having an influence on JCF, one of the two largest community foundations in San Diego County. Individual donors to JCF have expressed a desire to learn more about the grantmaking philosophy of Weingart Foundation and its particular grantmaking processes as they has been demonstrated through the JCF-Weingart Small Grant Program (e.g., the due diligence process). Additionally, new nonprofits are being introduced to donors at JCF. Establishing and growing such relationships could have significant impacts on these smaller organizations in the future. Thus, while not much is yet known about Weingart Foundation’s impact on San Diego grantmaking practices, we believe the anecdotes provided by JCF demonstrate that the question remains relative and worthy of follow up over time.

COMPARING 2014 TO PREVIOUS GRANT CYCLES

Perspectives of Applicants and Grantees

Although some differences in evaluation results between this cycle and previous cycles have been noted throughout the report, this section presents responses given when participants who had previously been funded under the Weingart Small Grant Program were asked to note any observable differences under the JCF-Weingart arrangement. Written comments from returning applicants provide compelling evidence that the process was the same as or better than previous years. Specifically, it appears the process was perceived as more detailed and more personable. Both Sharyn and Janine were identified by name numerous times as having been helpful. At least twenty-three respondents’ written comments indicate the process was better than in previous years. Both Applicants and Grantees expressed appreciation for having a local foundation and program officer available to answer questions.

Here is a sample of the type of comments received:

- “There was a similarity but seemed streamlined somehow. Possibly I am more experienced now. The cycles have been changed a bit, which is improved, and everyone is very helpful and caring, which is consistent with my previous experience.”
- “We were thrilled to hear about this partnership, as we've valued our relationships with Weingart and JCF individually. From the Grantee side, it seems like year one of the collaboration is going great!”
“More feedback was given on why we were declined with several tips on reapplying as well as additional information on other foundations to approach. In all a very positive experience with JCF-Weingart even if we were in fact declined”

“There was more communication initiated by the program officer that helped us all be on the same page.”

“Staff have a strong understanding of the grant making process and offer great guidance to a nonprofit in determining how to ask for funding and where to focus to strengthen flat sides.”

“It seemed quite similar, except that it felt ‘closer to home’ and that was good.”

For the three respondents that indicted the process was worse than in previous years, the concerns seemed to be technical in nature. There appeared to be some confusion between the organizations because, as one Applicant wrote, “the two websites didn’t have the same criteria.” One Grantee indicated that the online application was frustrating in that it could not be saved and returned to at a later date, and one Applicant reported missing a deadline due to difficulty reaching foundation staff members. This same Applicant also admitted to having had recently hired a new grantwriter, which may have affected things on their side.

COMPARING FINDINGS TO THE CEP REPORT

In 2014, Weingart Foundation commissioned a Grantee and Applicant Perception report from the Center for Effective Philanthropy (CEP). This study assessed Foundation grantmaking throughout Southern California (not including San Diego) and benchmarked the results against a national data set of foundations maintained by CEP. On many of the measures data about the Southern CA Small Grant Program are disaggregated, allowing for some comparisons to the JCF-Weingart program to be made. It should be noted that while the measures are not perfect matches, we believe they are close enough to compare and contrast some of the major themes.

Southern CA SGP respondents and the San Diego JCF-Weingart respondents both give the foundation high marks for positive interactions, responsiveness, fairness, and communication. In the Southern CA SGP, more than half of the respondents felt that the application process helped to strengthen the organization’s program. Although this question was not asked specifically in this evaluation, comments provided indicate that respondents in San Diego may feel similarly.

The CEP report findings raised some questions about return on investment (ROI), contrasting the time spent on the application and reporting requirements with the amount awarded. On average,
Southern CA SGP Grantees reported spending 12 hours on the application process. On the other hand, 78 percent of JCF-Weingart respondents reported spending less than nine hours on the application process. The in-person grant application workshop and close working relationships with program staff are likely associated with this reduced time spent on the application. In addition, although the measures are not the same, the findings from both studies indicate that JCF-Weingart Grantees may feel more slightly more comfortable approaching the foundation if a problem arises.

Finally, the Southern CA SGP respondents expressed a lower level of satisfaction with the ROI as it related to the evaluation and follow-up requirements. However, we do not yet know very much about how JCF-Weingart Grantees perceived the ROI of these requirements. We do know that some have expressed some confusion about what is required and can only assume at this point that they will learn more as they move through the process. What is not fully understood is the extent to which JCF-Weingart Grantees believed the reporting requirements are commensurate with the grant award since this evaluation did not ask this particular question. Because the median grant size for JCF-Weingart Grantees was $5,000 lower than the Southern CA SGP Grantees ($10,000 and $15,000 respectively) it is conceivable that the JCF-Weingart Grantees could have similar or even stronger feelings once they are required to complete the reporting requirements at the end of the grant cycle. It is recommended that future evaluations include questions about ROI for reporting requirements to make a better assessment. Additionally, if changes are being considered for reporting requirements for the Southern CA SGP in the coming months, we suggest testing or implementing them in San Diego with this 2014 cohort of JCF-Weingart Grantees.

**CONCLUSIONS AND RECOMMENDATIONS**

The evaluation found that the goals and objectives of Weingart Foundation are being met through the collaboration established with the Jewish Community Foundation to manage the JCF-Weingart Grant Program in San Diego County. Grantees and Applicants report continued high levels of customer service and overall satisfaction with this new approach. The evaluation gathered sufficient evidence to suggest that running the program through a local funder has helped to increase awareness and reach of the program into new, and in most cases, underserved communities.

Short of opening a satellite office in San Diego, situating the fund at one of the two-largest community foundations in San Diego has, thus far, proven to be an effective way for Weingart
Foundation to engage with the local San Diego grantmaking community. Indeed, after one cycle of the JCF-Weingart Grant Program there is already some anecdotal evidence to suggest that individual donors to JCF are interested in learning more about Weingart Foundation and its grantmaking approach. However, the evaluation also documented that Weingart Foundation remains unique in its approach of providing countywide, unrestricted, general operating grants to nonprofits with budgets less than $1.5 million. Grantees and Applicants acknowledged that JCF-Weingart funding fills a philanthropic gap in the region and they valued the opportunity to access general operating funds through a local funder. Additionally, both groups clearly expressed appreciation for the emphasis Weingart Foundation and the JCF-Weingart Grant Program placed on respect and customer service throughout the grantmaking process.

The evaluation also identified a few areas for process improvement. This section of the report consolidates and attempts to prioritize pertinent recommendations for program improvement based on the feedback presented throughout the report. A complete list of survey respondents’ recommendations and all open-ended responses are provided in Appendix D. Additional recommendations may be added once the report has been reviewed jointly by Weingart Foudation and JCF staff members.

Participants in the evaluation recommend that the JCF-Weingart Grant Program:

- Provide additional information to applicant about the type of support for which to apply.
- Continue to host an application workshop, which was seen as very helpful. Also, consider the possibility of putting a video of the workshop online.
- Provide additional clarification about reporting requirements.
- Add a save function to the online application.
- Continue to seek feedback about the process. Reflecting the sentiments expressed by many survey respondents one Grantee wrote: “Thank you for asking for our feedback. This is the first time anyone has ever asked us.”
- Consider creating ongoing feedback mechanisms such as featuring an electronic link on the JCF webpage or embedding a link in correspondence materials, such as below the signature line in an email. The Peery Foundation provides an interesting example for consideration that can be found at [www.funderfeedback.org](http://www.funderfeedback.org).
- Add information on the website about how to relate with the foundation and foundation staff. For example, let applicants know that they are encouraged to contact staff if they have a question or update regarding their application. From the comments provided, it seemed as though a few organizations were unsure if they
should initiate a call or wait to hear from program staff. Also, continue to encourage organizations to follow up if they are not funded. Although there was no indication that this was not done, and indeed declined applicants are encouraged in the notification letter they receive to follow up with the JCF-Weingart staff, a few comments indicate that some organizations were not sure if such action was appropriate.

In addition to the recommendations provided by Grantees and Applicants, the evaluation team recommends that JCF and Weingart representatives:

- Discuss future staffing and budgetary needs of the program
- Monitor costs associated with the administration and reporting of individual grants through this cycle to assess return on investment of time spent on such activities
- Target additional outreach into East County and South Bay regions
## APPENDICES

### Appendix A: Geographic Distribution of Applicants and Grantees

<table>
<thead>
<tr>
<th>San Diego County</th>
<th>Nonprofits in San Diego with Budgets $1.5M or less*</th>
<th>Residents with income below poverty line in 2009</th>
<th>Grantees &amp; Applicants</th>
<th>Grantees</th>
<th>Applicants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campo</td>
<td>0% (n=30)</td>
<td>16.7%</td>
<td>1%</td>
<td>0%</td>
<td>1%</td>
</tr>
<tr>
<td>Carlsbad</td>
<td>4% (n=415)</td>
<td>8.1%</td>
<td>2%</td>
<td>0%</td>
<td>4%</td>
</tr>
<tr>
<td>Chula Vista</td>
<td>4% (n=448)</td>
<td>15.0%</td>
<td>4%</td>
<td>2%</td>
<td>7%</td>
</tr>
<tr>
<td>El Cajon</td>
<td>4% (n=415)</td>
<td>30.0%</td>
<td>2%</td>
<td>0%</td>
<td>4%</td>
</tr>
<tr>
<td>Encinitas</td>
<td>3% (n=269)</td>
<td>9.8%</td>
<td>3%</td>
<td>0%</td>
<td>5%</td>
</tr>
<tr>
<td>Escondido</td>
<td>4% (n=431)</td>
<td>19.6%</td>
<td>1%</td>
<td>0%</td>
<td>1%</td>
</tr>
<tr>
<td>Julian</td>
<td>0% (n=51)</td>
<td>10.1%</td>
<td>1%</td>
<td>0%</td>
<td>1%</td>
</tr>
<tr>
<td>La Jolla</td>
<td>4% (n=379)</td>
<td>5.7%</td>
<td>1%</td>
<td>0%</td>
<td>3%</td>
</tr>
<tr>
<td>La Mesa</td>
<td>3% (n=282)</td>
<td>11.8%</td>
<td>1%</td>
<td>3%</td>
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</tr>
<tr>
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<tr>
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</tr>
<tr>
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<tr>
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<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Solana Beach</td>
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<td>2%</td>
<td>0%</td>
</tr>
<tr>
<td>Spring Valley</td>
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<td>4%</td>
</tr>
<tr>
<td>Vista</td>
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<td>3%</td>
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<tr>
<td>Other</td>
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<tr>
<td>Orange County</td>
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<tr>
<td>Laguna Hills</td>
<td></td>
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<td>0%</td>
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</tr>
</tbody>
</table>

*Data Source: Caster Center 2014 State of Nonprofits Annual Report; City-Data.com
Appendix B: Geographic Distribution of Services Provided by Grantees

<table>
<thead>
<tr>
<th>Location</th>
<th>2014 Percent</th>
<th>2014 Number</th>
<th>2013 (Cycles 1,2, &amp;3) Percent</th>
<th>2013 (Cycles 1,2, &amp;3) Number</th>
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<tbody>
<tr>
<td>Total Respondents</td>
<td>100%</td>
<td>54</td>
<td>100%</td>
<td>94</td>
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<tr>
<td>Entire County</td>
<td>50%</td>
<td>27</td>
<td>53%</td>
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<tr>
<td>Carlsbad</td>
<td>9%</td>
<td>5</td>
<td>11%</td>
<td>10</td>
</tr>
<tr>
<td>Chula Vista</td>
<td>13%</td>
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<td>7%</td>
<td>7</td>
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<tr>
<td>Coronado</td>
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<td>1</td>
</tr>
<tr>
<td>Del Mar</td>
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<td>4%</td>
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<td>Encinitas</td>
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<td>10%</td>
<td>9</td>
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<tr>
<td>Escondido</td>
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<td>6</td>
<td>9%</td>
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<td>Imperial Beach</td>
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<td>1</td>
<td>2%</td>
<td>2</td>
</tr>
<tr>
<td>La Mesa</td>
<td>11%</td>
<td>6</td>
<td>3%</td>
<td>3</td>
</tr>
<tr>
<td>Lemon Grove</td>
<td>13%</td>
<td>7</td>
<td>4%</td>
<td>4</td>
</tr>
<tr>
<td>National City</td>
<td>13%</td>
<td>7</td>
<td>7%</td>
<td>7</td>
</tr>
<tr>
<td>Oceanside</td>
<td>11%</td>
<td>6</td>
<td>13%</td>
<td>12</td>
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<tr>
<td>Poway</td>
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<tr>
<td>San Diego (City)</td>
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<tr>
<td>San Marcos</td>
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<td>10%</td>
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</tr>
<tr>
<td>Santee</td>
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<td>3</td>
<td>2%</td>
<td>2</td>
</tr>
<tr>
<td>Solana Beach</td>
<td>7%</td>
<td>4</td>
<td>5%</td>
<td>5</td>
</tr>
<tr>
<td>Vista</td>
<td>13%</td>
<td>7</td>
<td>11%</td>
<td>10</td>
</tr>
</tbody>
</table>
Appendix C: Location of 2014 Grantee Organizations

- San Diego / North Park (92104) – 1 organization
- San Diego / City Heights (92105) – 2 organizations
- San Diego / Sorrento Valley (92121) – 1 organization
- San Diego / Sierra Mesa (92123) – 1 organization
- San Diego / Pacific Beach (92169) – 1 organization
- San Diego / Solana Beach (92075) – 1 organization
- San Diego / Vista (92181) – 1 organization
- San Diego / Vista (92183) – 1 organization
Appendix D: Responses to Open-Ended Questions

Grantee Q7 /Applicant Q7: If you accessed information from the JCF website before you applied, please rate the extent to which you agree with the following: [The information on the website was clear. The information on the website was helpful. The website is a useful tool.] ... Are there any website changes you would recommend we consider?

Grantee Comments:

- Have the list of grant application questions be accessible in Word or PDF format as well.
- For submission of the grant application, the ability to start, save and return to finish would be very helpful.
- It would be helpful if the applicant could save information entered and later return to the application, instead of having to fill in all of the information at once.

Applicant Comments:

- Including the application as a PDF or word document that could be downloaded for review.
- The current website 2013/2014 is clear.
- Based on the website we applied for general operating expenses. During the follow-up discussions we were told that we should have applied for capacity building. The distinction was not clear on the website and we lost the grant because of applying in the wrong area.

Grantee Q8 /Applicant Q8: Please rate the extent to which you agree with the following statement. Once you decided to apply for a grant, the application process was clear.

Grantee Comments:

- The grantee seminar was terrific.
- Some clarification of terms needed, but there were people available by phone to help the website is good....very clear.
- It was only clear because we attended the workshop about how to fill out the application. I don't know if we would have known so well how to answer the questions had we not attended the workshop.
Applicant Comments:

- A save function would have been helpful.
- Operating support vs. program support.
- See answer to 7.
- The super-abbreviated application form does not allow us to tell the whole story of our program. I understand they may be trying to save us effort if they don't want to pursue our program, but I don't think we got a chance to fully explain our program.

**Grantee Q9/Applicant Q9:** Prior to submitting the application, did you have any contact with a JCF staff member via phone or email about this application?

Grantee Comments:

- I came to the informational meeting.
- We had some questions-all were addressed promptly and to our satisfaction.
- Jean Mason and one other woman were very helpful.
- Sort of - I submitted an incomplete grant and needed to get back into finish it.
- Mostly prior to the JCF/Weingart announcement, but after attending the grant application workshop, no further clarification was necessary.
- We participated in the grant meeting and asked some questions. We may have contacted someone once more after the meeting
- we received information that sahryn goodson would take over for janine mason.
- Community Outreach event
- at workshop conducted at JCF office
- I can't recall. I think so. Yes, indeed because the programs was be continued and shared

Applicant Comments:

- Former employee applied for grant.
- We will do this next time.
- I spoke to a staff member in person.
- I called to confirm that our organization was a good fit.
- Sharyn Goodson was able to answer questions that made using the new website easy. She was also able to answer questions that were not on the site about our compatibility.
- Went to the workshop.
- very helpful
- I attended their grant workshop
• actually consultant - Janine Mason
• Just asked about what names to put where so we didn't get disqualified on a technicality

Grantee Q12 /Applicant Q12: Do you feel that the amount of effort that you put into the grant application process was appropriate for the size of the grant you were applying for?

Grantee Comments:

• Yes, the most time consuming part is the board giving and "sphere of influence piece" but it's also an exercise that is helpful for other purposes within the organization.
• Yes, sometimes grants in the $2,000-$5,000 range can take longer than those in the $10,000-$25,000 range. Your application process is commensurate with our $15,000 award. Thank you for this conscientiousness.
• It cost us $450 to pay a grant writer...the amount we received went down...grant writing is expensive...the grants process should be simple and inexpensive
• We were hoping to receive $20K ..maybe next time ;)

Applicant Comments:

• It's appropriate if the proposal is awarded (!)
• Yes if we had received the grant. Disappointed that we were told we should have applied in a different category and that we couldn't change the application until next year. The staff person at JCF had recommended the area that we applied for.

Grantee Q13 /Applicant Q13: Do you feel that JCF staff responded to your application in a timely manner?

Grantee Comments:

• JCF staff was very responsive during the process and was very helpful
• We got a call earlier than I thought!
• Super
• JCF is warm, friendly, engaging, encouraging, fair, interested, supportive

Applicant Comments:

• First year no. As the transition to San Diego became clear the staff were very helpful.
• Staff is empathetic and clear. Very professional in best sense of the word.
Grantee Q16: Based on the review process of your proposal, to what extent do you agree with the following statements? [I felt the program officer spent an adequate amount of time getting to know our organization’s needs. The review was thorough. I felt the program officer’s questions were inappropriate. I felt the program officer developed a solid understanding of our request. JCF staff responded to our questions in a timely manner. I feel comfortable approaching JCF if problems arise during the grant period] … Please add any additional comments.

Grantee Comments:

• The staff were knowledgeable, thorough and educated. The grantee training forum before the application process was started was terrific.
• Not only was the program officer thorough but also gave me some suggestions to better our program and our next ask.
• Staff were a pleasure to work with. We sincerely appreciate your continuing support of [redacted].
• I really appreciated the conversation as the program officer was able to provide feedback and suggestions for improvements in our grant applications, and provided clarity on how to include agency information that hadn't made it in to the JCF-Weingart application.
• Super response...I wish more Foundations were as professional and timely as this one.
• The JCF Staff are easy to work with. They offer appropriate and useful suggestions.
• The program officer actually added some really beneficial suggestions around infrastructure and capacity building. It was great to have her expertise in discussing our plans and challenges!
• The pre-application briefing was very helpful.
• it was a pleasure working with the JCF staff ...very hands on
• Our interactions have all been with Janine Mason, who I believe is acting as our Program Officer.
• The interview/follow-up conversation on our grant application was one of the best I have experienced. The program officer asked fantastic questions, was able to answer any of my questions, and it felt like she was genuinely interested in understanding our work at a deep level in order to make the best decision possible.
Grantee Q18/Applicant Q14: To what extent did you feel that the grant application process was respectful of you as an applicant?

Grantee Comments:

- small non profits are at the bottom of the food chain...we work in the trenches with mostly volunteers...our paid people work for nearly nothing...the JCF is beyond respectful...they made us feel valuable

Applicant Comments:

- I am not sure if they realize our efficiency with a staff of one and a small budget. We are over 20+ years old and I felt that they thought our budget was too small for the work that we do. All volunteer. We are a Community and Neighborhood Association Support group and act as fiscal agent and networking resource. Very cost effective
- Janine Mason explained the decision to us. We appreciated her detailed call letting us know.
- With the caveat that the deadline had shifted, and there was confusion on our part regarding the grant period, which ultimately made us ineligible. This was a huge disappointment that our grant wasn't even reviewed because of this fact

Applicant Q15: In your experience was the application process for the JCF Weingart Grant Program fair?

Applicant Comments:

- I assume it was fair. I think I would call it very fair if we had received a grant. It's hard to know from the outside looking in. I wrote the grant feeling that we were very worthy
- There is a problem when the JCF staff recommends applying for general operating expenses (someone who knows our NP very well) and the Weingart staff feels we should have applied in a different area and we weren't given an opportunity to change.
- there should be more clarity on the grant period.

Applicant Q16: Did you follow up with JCF staff about the reason for denial?

Applicant Comments:

- We unfortunately do not fit the new guidelines
- We got some very helpful feedback.
- Have not done this and did not know if that was encouraged.
• The letter was clear that there were several requests, and not to take it personally
• I asked a staff member to do so; I believe it dropped of her list; I will ask her next week
• Will follow up
• Staff was very helpful - thank you
• All grants are competitive so it is not safe to assume you will not get every grant you apply for, no matter how worthy the cause.
• Janine Mason explained the reason.
• JCF stated that the amount of applicants was the deciding factor
• We didn't contact JCF staff about the reason for denial because grant process was during [redacted] busiest time of the year.
• I was not entirely surprised that we didn't receive it.

Applicant Q17: If you did follow up with JCF staff, was the reason behind the decision clear?

Applicant Comments:

• We were denied for applying for the wrong category of funding but a JCF staff member told us to apply for that category.
• Since Weingart and JCF is obviously committed to SD nonprofits, more post-decision engagement is encouraged.
• Sharyn was helpful but without a relationship JCF can’t know about our level of integrity.
• I was told that the need of our request was not perceived as being critical
• It was mentioned to us that "we should have been more clear" and that they understood our confusion
• While the reasons given were clear, it was also weak. If they had questions they should have asked us.
• I wish they'd been explicit in the meeting that they're not interested in funding food banks, except for Julian.
Applicant Q18: Do you anticipate reapplying to the JCF Weingart Program in the future?

Applicant Comments:

- We no longer fit the guidelines
- We have applied three times without being awarded a grant of any amount. So I can only think that it must be our agency and our target population. I say this in part because I also wrote applications for two other agencies over the three year period, which was founded.

Grantee Q22 /Applicant Q21: Please briefly tell us how, if at all, this grantmaking process differed from previous cycles, which were directly managed by the Weingart Foundation?

Grantee Comments:

- I didn't see any difference
- I was not with the organization when the previous grant was submitted so I am not aware of the process changes.
- There was a similarity but seemed streamlined somehow. Possibly I am more experienced now. The cycles have been changed a bit, which is improved, and everyone is very helpful and caring, which is consistent with my previous experience.
- I don't recall any real difference - it went smoothly.
- I found the process similar and easy to apply, the interview was detailed and allowed time for questions, the staff was passionate about elevating the lives if the disadvantaged population living in San Diego community
- More formality in this new application process.
- I was not here for previous cycles so am unable to offer feedback in this area, but this cycle was wonderful. I especially appreciated the grant staff not minding our questions or calls.
- Workshop was helpful and informative. The staff was very available and approachable.
- Because of our position at the time in terms of age, budget and financial reports, the process was a bit more daunting. The substance was the same, however, in terms of "benevolent rigor."
- I don't recall the 45 minute phone call with our prior request. Other than that, it was very similar.
- no difference
- same process
- We appreciate being able to relate to a local foundation managing this fund, rather than a distantly situated financial institution.
• Several calls from program advisor to find out and tell us about the requirement and see if we were a fit.
• No difference really.
• It was nice to deal with a local foundation, but the entire process appeared seamless. We feel well served by both organizations and thank you.
• I did not apply the previous cycle since I was not employed at [redacted] at the time.
• Being based more locally the response time was better and phone call questions to the office were answered more directly.
• The process before was excellent. This process was excellent. What I noticed is commitment to quality care and support to prospective grantees. Janine Mason is extraordinary.
• I think the application itself was slightly different, but the process seemed pretty similar to what we experienced over the previous two years. The pre-application workshop was helpful, and not something offered before.
• Very similar.
• There was more communication initiated by the program officer that helped us all be on the same page.
• Not different.
• Pretty much the same process...no change in delivery. Very easy to understand.
• different due date.
• The two were nearly identical.
• JCF Staff have a strong understanding of the grant making process and offer great guidance to a nonprofit in determining how to ask for funding and where to focus to strengthen flat sides.
• I wasn't able to attend an info session with JCF, but our experience was equally positive as with Weingart in the past.
• I was not with the organization in the past so I cannot comment.
• Very similar to the last cycle.
• It seemed quite similar, except that it felt "closer to home" and that was good.
• I was not as involved in the prior process, but overall the process via JCF was very engaging and I appreciated the efforts to ensure that applicants had the information, resource and support needed to complete a competitive application.
• The application was more streamlined.
• same level of integrity and process quality.
• The current system if more detailed.
• Unknown-I wasn't the one who applied in the past.
• It was a very similar process, and it felt the same. The application was a bit more frustrating, as it couldn't be saved and returned to.
• Having relationships with local staff has been helpful throughout the process.

Applicant Comments:

• We were awarded a grant previously; this time we were not
• More feedback was given on why we were declined with several tips on reapplying as well as additional information on other foundations to approach. In all a very positive experience with JCF-Weingart even if we were in fact declined
• I was pleased to be able to talk to staff. Sharyn was very helpful both before and after the grant writing process.
• Glad it was with a San Diego foundation that understand our communities and its challenges
• It seemed very similar
• Very difficult and the grant writer was very new to the job. Unable to contact them for information/ clarity. Because we could not get answers and the two different dates for different geographic areas we missed the deadline
• We had a better idea of the types of NP's that Weingart was interested in funding.
• Easier
• This process included workshop but the previous did not. This process has assigned JCF staff to answer any follow up questions and the staff is available unlike the previous.
• I felt the submission process was fantastic. From what I was told when I followed up on our denial, it appears that programmatic funding requests were perceived as being of higher need than general support requests.
• the change in deadline and grant period was the biggest for us.
• The only difference in the grant-making process was that the Weingart Foundation offers an online application.
• It did not significantly vary.
• Confusion at first since the two websites didn't have the same criteria.
• There was no noticeable difference between the cycles. It was great that Janine was able to stay in San Diego and continue with the small grants program.
• Previously, though the San Diego program staffer was here, the grant making process seemed a bit remote. Staff at JCF was available and smart.
• I am new to my organization, and this was my first experience with the Weingart/JCF grantmaking cycle.
• I don't know, I was not involved in the previous cycle(s).
• The program officers seemed to be less stressed out over the phone.
• It feels a bit less connected. In talking with Weingart in the past, they stood out from other granting organizations in the fact that they would likely continue support of an organization if the project was successful and, even, ongoing. The continued option for general options funding is appreciated.
• JCF staff's presentation on the grant process was very helpful

Grantee Q23 /Applicant Q22: Overall, do you have any suggestions and/or recommendations for how to improve the application and/or review process?

Grantee Comments:

• The process was so organized and thorough we have no suggestions. Thank you!
• Don't have any suggestions at this time.
• I love the interaction with the program officer!
• I thought the process was very smooth and easy to understand. I love working with JCF. They are always professional and responsive. Really. I much prefer JCF to working with other funding orgs in our region.
• Allow for saving and returning to complete the grant application instead of requiring it all to be completed in one session.
• Possibly move the deadline a little earlier or a little later due to holidays/vacations during the deadline time of year.
• I would like to be able to access the application post-submission. I don't remember if there was at least as print option. But both print and post-submission access would be helpful. Thanks for your support!
• The process was great! It would be even better if it was a quicker turn around and of course, always, bigger funding opportunities. Thank you so much for the chance to work with the JCF-Weingart Grant Program.
• Just to perhaps update the online application to one which can be worked on and saved, then returned to prior to submitting it.
• It would be more easy to navigate the application if it was accessible through a website which prospective applicants could save their work, and then submit; rather than having to copy and paste their work into the application and submit.
• Minimizing paperwork helps drive money into the mission more efficiently. (lessen paperwork load preferred if possible)
• The process has seemed seamless thus far. While I understand that it isn't always possible, we are always happy to do in person reviews with the staff.

Applicant Comments:

• If you are interested, invite applicants not funded to call staff for feedback. Or, if you already do that, make it clearer.
• The workshop was quite helpful but we seemed to have gotten the wrong advice in a consult at the end of the workshop.
• More post-decision engagement. Orgs can learn a lot from denials and educate funders can help isolated orgs
• Since we are all local now. What is the best way to impress on JCF that an unrestricted funds grant to a small 501(c)3 group that is $ efficient and supports other groups is important to neighborhood associations. We act as their fiscal agent and pay for the required city insurance IF we can keep the doors open the lights on!
• JCF and Weingart staff need to be on the same page in giving recommendations about what to apply for.
• Even though the grant process was fair, our proposal was not funded for a very minor reason which could have been resolved by a phone call or email to clarify the issue. My recommendation would be both applicant and JCF need to build professional relationship to help capture any small issue before denying the grant. [redacted] Initiative is a grass- root community based organization very dedicated to serving the underserved population like the refugee and immigrant women and their families. For more information please find us on [redacted].org, fb, linkedIn, and twitter.
• In all materials and presentations it was communicated that general operations support requests would be given the same consideration as program specific requests. We could have applied for either (since we had matching program funding) but we chose the general operations approach and it seems this was a bad choice. I was told our request was considered "not as critical". We are currently in a big organizational transition and the general operations funding was in fact our biggest need as we work to determine the new path and vision for our organization and build staff, board and volunteer capacity. I feel that the grants panel might be able to use some additional training to better understand the importance to small nonprofits of org development work. Thanks.
• as mentioned before, maybe there could be a check-off at beginning of grant to clarify what period of funding this is for.
• Allow a more extensive first application, so that we can more fully explain how we would use a grant and why it would serve our clients well.
• I think the online application is not as user-friendly as it should be. For instance, it would be great if we could save it and go back to it on a later date.

Grantee Q36: Have you noticed any change(s) in local funder practices/policies as a result of the JCFWF grantmaking approach.

Grantee Comments:
• We are a faith-based funded mission. We do not restrict services based religious beliefs. I felt a bit more defensive about being faith-based

Grantee Q37/Applicant Q35: We welcome any additional comments, observations or opinions that you wish to share.

Grantee Comments:
• I am always concerned when it comes time for the phone interview but it has been a learning experience, as well. I really appreciate the assistance that we have received from this grant award.
• As a small organization, I am grateful to the foundation for their support in the area of GOS
• We appreciate the interactive approach of the foundation with the nonprofit community to meet the most urgent needs.
• Thanks for asking.
• We are grateful for the Weingart Foundation's continued support of our mission, and look forward to working with JCF in the future.
• We are so grateful for your support and that you stand with us!
• Thank you for asking!
• Thank you for supporting non-profits in the San Diego Area.
• Weingart Foundation's efforts in San Diego County are terrific. Any chance the total investment will grow over time?
• We were thrilled to hear about this partnership, as we’ve valued our relationships with Weingart and JCF individually. From the grantee side, it seems like year one of the collaboration is going great!
• Thank you for the opportunity to deepen and improve the work we are doing - for not requiring an "innovation" when something is already working very well.
• Thank you for asking for our feedback. This is the first time anyone has ever asked us.
• The Weingart/JCF grant process is one of the best I have seen. Communication is professional and respectful.
• It's always a pleasure working with the program officers- I know they are inundated with requests
• Thank YOU!
• Thank you for your generosity and you willingness to learn throughout this process.
• The process is very professional and helpful. We are honored to be one of the organizations to receive the support of the JCFSD-Weingart Grants Program Fund.
• thank you for taking time to conduct a survey. it is a pleasure working with you and the JCF
• Appreciate JCF-Weingart partnership and support VERY much!
• Thank you for your generosity!

Applicant Comments:

• Wonderful organization that we hope to partner with again in the future!
• Thank you for asking for our input.
• We are in our 14th year as a nonprofit and Weingart Foundation was one of our first grants in 2001 that helped us launch our programs in the community. We are very grateful to the Weingart Foundation for believing in our mission and continuing to support us!
• Thank you for the opportunity to apply.
• Thanks and I am happy to share more if you want
• Sending out the survey sooner would be helpful to provide better feedback.
• Thanks for offering the Weingart grants to so many organizations that are accomplishing so much good.
• We are hoping for an opportunity for an relationship with JCF
• Thanks for the opportunity to give feedback.
• Hope the feedback is used to improve the grant making process and expand the types of organizations funded.
• We appreciate the time the Weingart Foundation has always taken to prepare applicants for their grant application, and their open communication policy.