Healthcare Georgia Foundation
2015 Grantee and Applicant Survey Results

Prepared by the
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December 2015

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I. Background

Since the inception of Healthcare Georgia Foundation in 2002, the principles of accountability and transparency have guided the Foundation's management, operations, and decision-making activities. One tool that the Foundation uses to assess the effectiveness of its philanthropic activities is a survey of grant applicants. Surveys of Foundation grantees and applicants have been conducted in 2003, 2005, 2009, 2011, and 2015 to assess their experiences with the grantmaking process, Foundation roles, and the manner in which the Foundation engages its target population of agencies and organizations.

The 2015 survey was the first time the Foundation sought feedback from grantees and applicants after three years of significant changes to the Foundation's grantmaking practices. During this time, the Foundation restructured its grantmaking priorities and processes. Grantmaking changes included:

- Moving from a paper to online application process.
- Altering the opportunities to apply for grants by eliminating the year-round application cycle and Letter of Intent. The Foundation moved to issuing specific Requests for Proposals (RFPs) and Notifications of Funding Availability (NOFAs) rather than allowing grantees to submit applications throughout the year.
- Shifting funding toward strategic initiatives rather than more responsive models of funding; this shift increased the level of competition for available direct service and general operations support.
- Prioritizing funding to high capacity and high functioning organizations that have a track record of showing results.
- Increasing expectations and requirements related to evaluation in the application and as part of the grant; as a result of higher expectations, the Foundation integrated its Evaluation Resource Center into the grantmaking process and made evaluation support available to applicants and grantees.
- Given all of the changes, offering targeted technical assistance to applicants and grantees during both the pre- and post-award period.

These changes resulted in a much more competitive environment for funding. The Foundation received many more applications for the same amount of available funding, meaning that there were a higher proportion of unfunded applicants than there had been in previous years.

The survey asked respondents 28 questions in three areas:

1) Background and characteristics of respondents/organizations
2) Perceptions of the Foundation's role and work
3) Experience working with the Foundation

This report provides a summary of the 2015 survey results, with comparisons to previous years where comparable data were available.

II. Methods

The most recent Grantee and Applicant survey obtained a snapshot of opinions and perspectives from agencies and organizations that applied for funding between 2013 and 2015. This was the first time applicants and grantees provided feedback on the Foundation's grantmaking structures and process since significant changes were implemented in January 2012.

The 2015 survey was sent via SurveyMonkey to 304 organizations, which was significantly more organizations than were surveyed in 2011 (n=174). There were 132 respondents for an overall response rate of 43% (compared to 55% in 2011 and 36% in 2009). Respondents were not required to answer every question, explaining why sample sizes vary between questions and in components of some questions. After an initial email invitation was sent, non-respondents were sent up to seven reminder emails over a six-week period.

Respondent organizations represented a diverse mix of organizations and budget sizes and were spread across the state of Georgia. They represented organizations whose applications were funded, declined, or both, and organizations who had applications still in the review process.

The survey's 28 questions asked respondents for quantitative information, including responses to multiple choice and scaled questions, and qualitative information that asked for words, phrases and comments. Responses were analyzed for themes and trends.

III. Description of survey sample

To understand who was responding to the survey, respondents were asked a series of descriptive questions about their organization, their role and their experience working with the Foundation.

Respondents by funding status

The majority of respondents to surveys in 2011 and 2015 were current or past grantees of the Foundation. The categories were not mutually exclusive (i.e., respondents could select more than one response). The categories included current/past grantee, unfunded applicant, current applicant awaiting decision and other. As indicated in Table 1, in this year's sample the percentage of unfunded applicants and applicants awaiting decisions was slightly higher than in 2011.

Table.1 Respondents by funding status

Funding status	2011 Total (n=86)	2015 Total (n=124)
A current or past grantee of the Foundation	74% (n=64)	67% (n=83)
An unfunded applicant	23% (n=20)	30% (n=37)
A current applicant awaiting a Foundation decision	8% (n=7)	13% (n=16)
Other[1]	3% (n=3)	2% (n=2)

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[1]Respondents selecting "other" commented that they had: (1) received a donation from the foundation and (2) received a grant through GCCN Mini Grant process.

Respondents by organization type

As in previous years, most respondents represented community-based/health services organizations. As summarized in Table 2, the distribution of respondents from other types of organizations was similar to previous years where data were comparable. In 2015, when comparing grantees with unfunded applicants, grantees were more likely to identify as community based/health services, public policy/advocacy organizations, and statewide organizations than unfunded applicants.

Table 2. Respondents by organization type

Category & organization types	% 2009 (n=NA)	% 2011 (n=83)	% 2015 (n=124)
Community based/Health Services: community clinic, community based org, medical & other professional org	48%	42%	55%
Human service organizations: human service agencies, youth organizations	–	16%	15%
Public policy/advocacy: public policy/advocacy, policy analysis/think tank	4%	8%	10%
Education: community/vocational, 4-year college/university	7%	6%	6%
Statewide organization	–	–	9%
Technical assistance provider	–	–	2%
Government	3%	1%	–
Other[2]	38%	26%	2%

Grants received

Responses were received from organizations representing all of the Foundation's funding streams. Grantee respondents indicated receiving a grant for *direct service* (31%), *general operating* (31%), *initiative grants* (28%), and *health policy (8%). S*ix percent of recipients indicated they received a grant that did not fall within the categories provided. These responses included: medical and technology equipment update, restricted-donor software, distance learning/HealthTec[dl], and conference support.

Respondents by role within their organization

Participants were asked to identify their role within their organization; as in the 2011 survey, the majority of respondents were executive-level staff such as CEO, Executive Director and Principal (53%). In 2015, program staff such as Associate Directors, Program/Project Directors/Managers accounted for 26% of responses. Development professionals accounted for the remaining responses (22%).

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[2] Respondents selecting "other" identified that they represented a consulting, marketing or a communications firm.

Respondents by grantmaking regions

In 2009 and 2011 respondents represented all of the Foundation's grantmaking regions. In 2015, all regions, with the exception of Gainesville, Region 2, were represented in the survey. As in previous years, the majority of survey respondents came from organizations located in the Metropolitan Atlanta (67% in 2015, 63% in 2011, 58% in 2009) and Savannah areas (11% in 2015, and 10% in 2009 & 2011) (see Figure 1 and Appendix A for more details).

Figure 1. Distribution of respondents by region
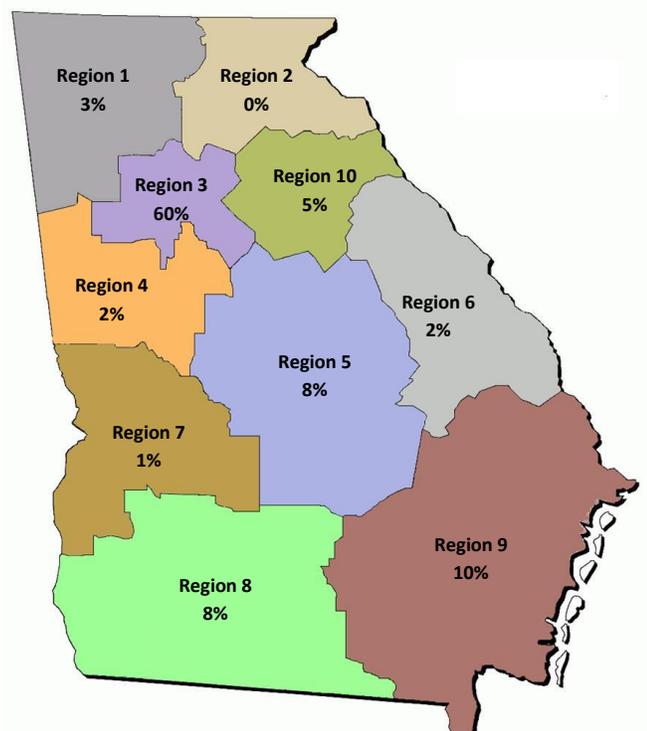
Respondents by organizational budget size

Similar to the 2011 survey, about half of respondents came from organizations with operating budgets (from their most recent fiscal year) of over $1 million dollars (46%), and the other half had budgets below $1 million (54%). The responses were relatively evenly distributed across the 8 response categories (ranging from 7-18%). The largest number of respondents came from organizations with $100,000 to $299,999 (18%) followed by organizations with above $10 million (17%) (see Figure 2).

Figure 2. Percentage of respondents by budget size
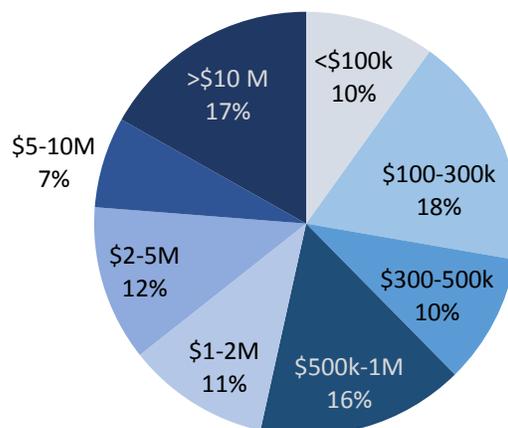
Ways organizations learned about the Foundation

Respondents learned about the Foundation in a variety of ways, as summarized in Table 3, including outreach from the Foundation and other sources. The most frequently identified ways respondents learned about the Foundation were *Foundation materials such as the funding guidelines, annual report, requests for proposals, webinars* and *referrals by another nonprofit organization.* These were the most common methods for both unfunded applicants and grantees.

In general, grantees tended to get more information directly from the Foundation than unfunded applicants who tended to get more information from external sources. Grantees were more likely to learn about the Foundation through *Foundation meetings/events*, *suggestion by a Foundation staff member to submit a proposal, and Foundation articles.* Unfunded applicants were more likely to have reported learning about the Foundation through "other" sources; responses included: historical knowledge, from colleagues/previous grantees, and through internet searches.

Table 3. How respondents learned about the Foundation (% of respondents)

(respondents could select multiple responses)	2011 (n=83)	2015 (n=131)
Foundation materials such as funding guidelines, annual report, requests for proposals, webinars, etc.	39%	42%
Referral by another nonprofit organization	31%	27%
Foundation meetings/events	15%	20%
Suggestion by a Foundation staff member to submit a proposal	22%	18%
Referral by another grant maker or corporate-giving program	10%	15%
Foundation Center or a local nonprofit resource center	22%	15%
Articles about the Foundation	15%	10%
Suggestion from a member of the Foundation's Board	16%	8%
Public presentations by Foundation staff	7%	6%
Foundation sponsorship/advertisements	10%	2%
Other	17%	18%

IV. Perceptions of the Healthcare Georgia Foundation

Survey respondents were asked to respond to three questions related to the Foundation's mission; whether the Foundation is (1) reaching traditionally underserved communities through its grantmaking; (2) providing activities that are accessible to areas outside of metro Atlanta; and (3) offering funding opportunities that address a broad range of health topics and special populations. There was a high degree of agreement with all three statements.

Reaching underserved communities

Survey respondents in 2015 continued to agree that the Foundation *is reaching traditionally underserved communities through its grantmaking*. In 2011, 88% of respondents agreed (93% of funded vs. 77% of unfunded) and 10% did not have enough information to answer the question. In 2015, there was slightly lower agreement with this statement (85%), and the trend of grantees being in stronger agreement than unfunded applicants continued (99% and 71% agreement respectively). The difference in agreement between groups (grantees/unfunded applicants) was statistically significant. As in 2011, in 2015, 10% of respondents did not have enough information to answer the question.

Figure 3. Agreement with two key statements about the Foundation

% agreement that Foundation is reaching traditionally underserved communities

	Agree	Disagree	Not enough information
2015 (n=132)	85%	5%	10%
2011 (n=91)	88%	2%	10%

% agreement that activities are accessible to organizations outside metro Atlanta

	Agree	Disagree	Not enough information
2015 (n=132)	71%	4%	25%
2011 (n=89)	68%	1%	30%

Accessibility outside of metro Atlanta

Participants reported their agreement that the Foundation's *activities were accessible to areas outside metro Atlanta.* In 2011, 68% were in agreement (74% funded vs. 44% unfunded), and 30% did not have enough information to answer the question. In 2015, there was stronger agreement (71%) with this statement, with 25% not having enough information to answer; grantees and applicants differed to a significant degree in their agreement with this statement (75% for grantees and 66% for applicants). While almost 70% of respondents came from metro Atlanta, no significant differences in responses to this question were found between respondents from metro Atlanta and other areas.

Funding addresses broad range of health issues and special populations

In 2015, a new survey item was added to assess the extent to which the Foundation *offered funding opportunities that address a broad range of health issues and special populations.* There was strong agreement (86%) with this statement, and fewer responded that they did not have enough information to answer the question (7%). Similar to the other questions, grantees and applicants differed to a significant degree in their agreement with this statement (95% for grantees and 73% for applicants).

How respondents describe the Foundation

Respondents (n=111) entered 325 words and phrases that they felt best described the Healthcare Georgia Foundation (see Appendices B and C for a full list and "word clouds" of positive and negative words). Responses were overwhelmingly positive and the most frequent words included: *Data driven/evaluation* (13); *Accessible* (12); *Commitment* (10); *Support* (10); *Help* (9); *Caring* (7); *Leader* (7); *Dedicated* (6); *Forward-thinking* (6); *Innovate* (6); and *Organized* (6).

Other themes that emerged from descriptions of the Foundation that went beyond one-word responses included: *commitment to underserved, underprivileged, marginalized communities (n=12); commitment to improving the quality of health care (n=8); use of a statewide approach/is wide-reaching (n=5); emphasis on health improvement in rural parts of the state (n=5); emphasis on improving access to care (n=5); and focus on evidence or research-based work (n=4).*

Seven percent (n=22) of words had a negative slant to them. These responses came predominantly from unfunded applicants (n=16). The two most prominent themes were that the Foundation is *not accessible to new/non-traditional organizations* (n=5) and that the *grant application process is difficult* (n=4). A couple of people perceived the Foundation as "*insulated*" or "*inside perimeter*"; "*bureaucratic*"; and "*ignoring the mental health crisis.*"

Usefulness of Foundation resources to learn about the Foundation's work

Respondents were asked to rate the usefulness of different Foundation materials, products, and communication methods as sources of learning about the Foundation. All sources of information about the Foundation had high overall ratings—indicating that for the most part respondents found the materials useful (i.e., average rating was greater than 3.0 on a scale of 1 to 4, see Figure 4). The two items with the lowest ratings and whose weighted averages were below the mean were *press releases* and *social media,* which were also items in which respondents were less familiar. High percentages of respondents indicated they were not familiar with social media (45% not familiar), materials produced by grantees (42% not familiar), and press releases (28% not familiar).

Figure 4. Usefulness of ways to learn about Foundation (weighted averages, 2015)[3]

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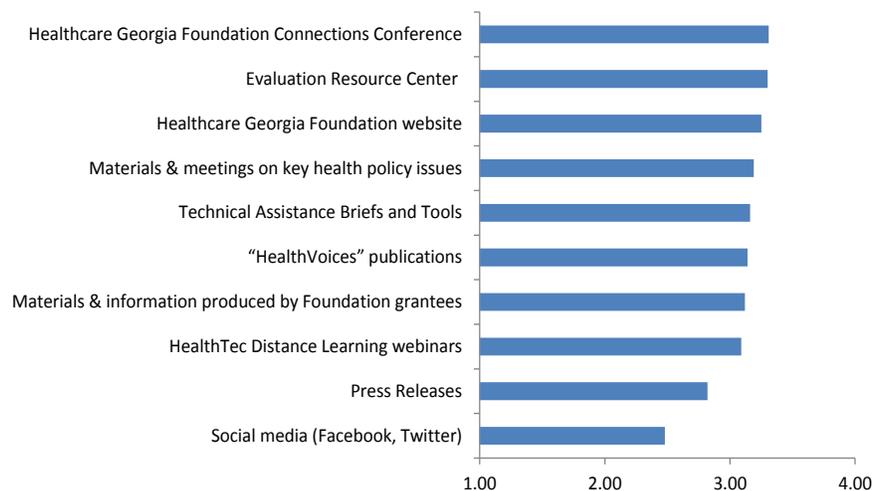
[3] Rating scale: 1=not useful; 2=somewhat useful; 3=useful; 4=very useful

In general, unfunded applicants rated the usefulness of all Foundation materials, products and communication methods lower than grantees, with the exception of the Foundation's website which both groups rated as useful. The high ratings for the website was consistent with the 2011 results, when a majority of respondents agreed that the website provides *the information I need about the Foundation's grant-making goals and processes* (93%) and that *information that I access on the website is easy to understand* (92%*).*

Where data were comparable,[4] usefulness ratings for most items were lower in 2015 than 2011; however, that was driven by a higher percentage of respondents reporting that they were unfamiliar with the publications and materials.

Effectiveness of Foundation in performing core grantmaking activities

The majority of respondents indicated that the Foundation was "very effective" and "effective" in achieving its outcomes (weighted average for each item ranged from 3.96 to 4.28; where 4=effective). The items where the Foundation was rated as the most effective (4.2 or higher) included: *advancing health policy in Georgia; expanding access to care for underserved populations*; and *strengthening non-profit health organizations*.

There were significant differences in responses between grantees and unfunded applicants for all items (Figure 5), with unfunded applicants rating effectiveness of the Foundation lower than grantees. Grantees rated effectiveness, on average, between 4 and 5 (effective to very effective); unfunded applicants rated effectiveness, on average, between 3 and 4 (somewhat effective to effective).

Figure 5. Foundation's effectiveness achieving its outcomes (weighted average by applicant and grantee, 2015)[5]

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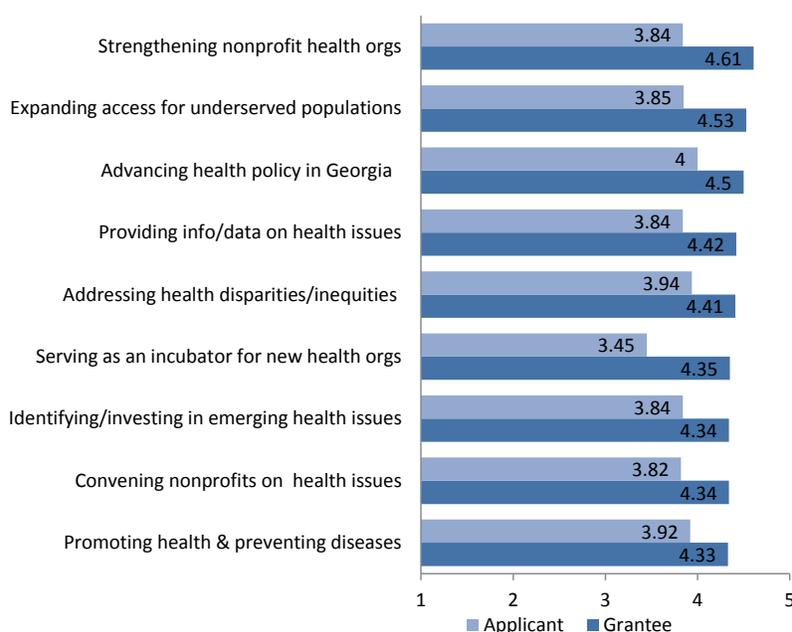
[4] Comparable data were available for "HealthVoices" publications; Annual Reports; Evaluation Resource Center; Foundation Conference; Foundation website; HealthTec Distance Learning webinars; Information about grantees on-line; Materials & information produced by Foundation grantees; Materials & meetings on key health policy issues; Press Releases.

[5] 5=Very effective 4=Effective 3=Somewhat effective 2=Not very effective 1=Not at all effective; don't know responses were excluded when calculating the weighted average.

There were many "don't know" responses to this question—at least 7% of all respondents selected "don't know" for each item, with a greater proportion of "don't knows" among unfunded applicants (between 13-47%). The outcomes for which 20% or more of respondents indicated they didn't know enough to rate included: *serving as incubator for new health organizations (40%), advancing health policy (21%), convening nonprofits on important health issues (21%) and identifying and investing in emerging health issues (20%).*

Comparing responses in 2015 to previous years, there continued to be high ratings of effectiveness, with over 75% of respondents indicating the Foundation was at least somewhat effective at achieving the majority of these outcomes. The one item that respondents were least likely to respond that the Foundation was effective at achieving was "incubator" of new health organizations. In 2011 and 2015, this was because there was a high percentage of respondents who indicated they didn't have enough information to rate this item.

 For 6 of 7 data points where comparison was possible, there was a slightly lower percentage of respondents rating the Foundation as effective in 2015 compared to 2011; however, in most cases this difference was not significant. The most significant decline was *identifying and investing in emerging health issues*, which decreased from 87% to 78% of respondents rating the Foundation as effective in this area (see Table 4).

Table 4. Perceived effectiveness of Foundation between 2009, 2011, 2015 (% of respondents)[6]

Foundation Outcomes	2009 (n=NA)	2011 (N=87)	2015 (N=126-127)
Expanding access to care to underserved populations	–	91%	90%
Strengthening nonprofit health organizations	81%	92%	86%
Providing information and data on health issues	89%	84%	84%
Identifying and investing in emerging health issues	82%	87%	78%
Advancing health policy in Georgia	–	82%	77%
Convening nonprofits on important health issues	–	79%	76%
Serving as an incubator for new health organizations	52%	59%	53%

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[6] Effective = very effective, effective, somewhat effective; "don't know" was included in the analysis here to be consistent with previous years.

V. Experience working with the Foundation

Respondents were asked to provide feedback on their experience working with the Foundation. Respondents were directed through screening questions to answer only the questions that were relevant to their experience.

General experience with Foundation staff
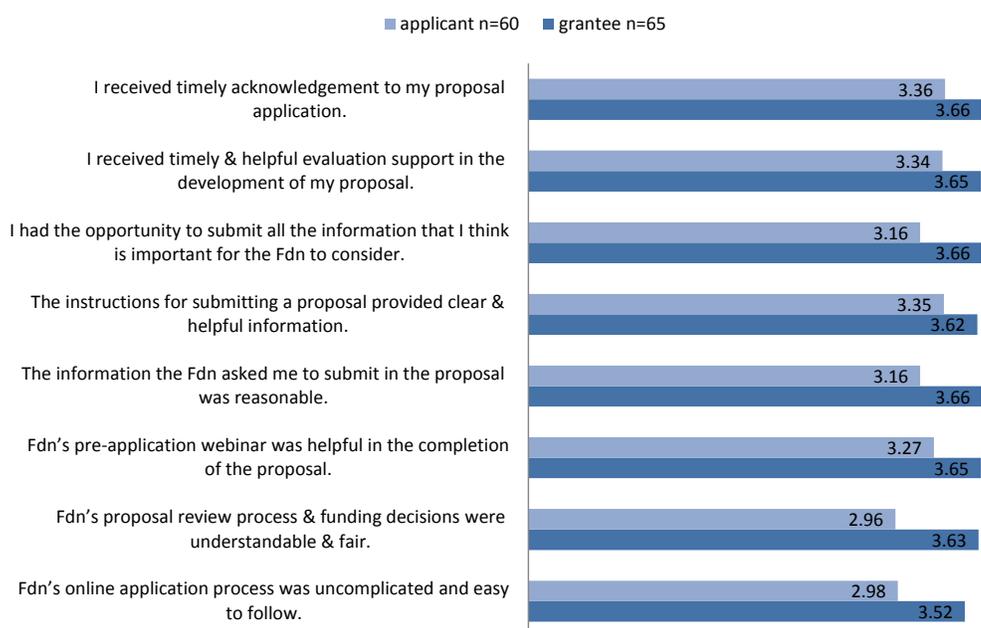
Overall, respondents agreed that:

- *When I contacted the Foundation for information, I was treated courteously by staff (96% agreement)*
- *When I had questions, staff members addressed my questions or concerns effectively (94% agreement)*
- *Staff members were prompt in responding to my inquiries (93% agreement)*

This is consistent with the responses to the 2011 survey, where there were also high levels of agreement with these statements about the Foundation's staff. In both 2015 and 2011, unfunded applicants rated their agreement with these statements lower than grantees.

Application/pre-award

When asked to rate agreement with a number of statements about the grant application process, respondents were overall in agreement on all items (on a scale of 1-4, with 4=strongly agree). However, there were significant differences between applicants and grantees on all statements (Figure 6), with unfunded applicants indicating lower levels of agreement. The items with the highest agreement included: *receiving timely acknowledgement to proposal application*; *receiving timely and helpful evaluation support*; and *having the opportunity to submit all of the information that they felt was important*.

Figure 6. Experience with the application/pre-award process (weighted average by applicant and grantee, 2015)

■ applicant n=60   ■ grantee n=65

Statement	applicant	grantee
I received timely acknowledgement to my proposal application.	3.36	3.66
I received timely & helpful evaluation support in the development of my proposal.	3.34	3.65
I had the opportunity to submit all the information that I think is important for the Fdn to consider.	3.16	3.66
The instructions for submitting a proposal provided clear & helpful information.	3.35	3.62
The information the Fdn asked me to submit in the proposal was reasonable.	3.16	3.66
Fdn's pre-application webinar was helpful in the completion of the proposal.	3.27	3.65
Fdn's proposal review process & funding decisions were understandable & fair.	2.96	3.63
Fdn's online application process was uncomplicated and easy to follow.	2.98	3.52

Among grantees, there was the lowest level of agreement for *the online application process was uncomplicated and easy to follow.* Unfunded applicants also had lower levels of agreement with that statement. In addition, unfunded applicants had lower levels of agreement for: *the grant pre-application webinar was helpful in the completion of the funding request* and *the proposal review process and funding decisions were understandable and fair.* Where data were comparable (Figure 7), we looked at differences in responses between 2011 and 2015.[7] In both years, there was high level of agreement with these statements—over 90% agreement. The one notable difference was the question about whether the Foundation's review process and funding decisions were understandable and fair, which dropped from 100% to 80%. This could because of a higher percentage of unfunded applicants responding, or because of changes to who responded to this question (see footnote).

Figure 7. Experience with the application/pre-award process (% agreement, 2011 & 2015)

I had the opportunity to submit all the information that I think is important for the Fdn to consider. — 97% / 91%

I received timely acknowledgement to my proposal application. — 95% / 97%

The instructions for submitting a proposal provided clear & helpful information. — 94% / 97%

The information the Fdn asked me to submit in the proposal was reasonable. — 91% / 99%

Fdn's proposal review process & funding decisions were understandable & fair. — 80% / 100%

■ % agreement 2015 (n=123-125)
■ % agreement 2011 (n=53-73)

Value of meetings with Foundation prior to grant decision

 In 2015, 48% of respondents participated in a meeting with Foundation staff prior to the grant decision (40% replied "no" and 12% "don't know"). Of those who participated, 95% agreed that meeting(s) with Foundation staff enhanced the proposal application process (n=60). In 2011, few, only 13% (n=7) respondents received a site visit; those who did also agreed that it enhanced the application process.

Inquiries about declined proposals

Similar to what was reported in 2011, in 2015 a majority (75%) of respondents felt comfortable inquiring further about the reason grant proposals were declined. In the open ended question that followed, a handful of respondents (n =5) reported that there is a need for the Foundation to provide constructive feedback to unfunded applicants.

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[7] The Foundation's application process changed since the 2011 report, eliminating a Letter of Intent (LOI) submission. In the 2011 survey only those who submitted a LOI responded to this question; in 2015 all respondents were included.

Suggestions to improve the application process

Respondents were asked to provide suggestions for how to improve the application process. In the previous year of this survey, respondents suggested that the Foundation improve/provide: *application timeline cycle, application process for past recipients, pre-planning meetings, explanation of importance of budget narrative, selection criteria and a more concise application*. There was a greater number of suggestions in 2015 (n=47) than in 2011 (n=14) for how the Foundation could improve its application process. This question was answered by a fairly even percentage of unfunded applicants (55%) and grantees (45%). In general, grantees and applicants commented on similar themes, however unfunded applicants commented to a greater extent on the need to support small organizations and provide feedback on declined proposals. Several themes emerged from the recommendations, summarized below along with illustrative comments. A complete list of recommendations is included in Appendix D.

More clarity around application process/ format (n=9)	*Although I prefer how concise we must be when submitting, it is unclear as to how this decision was made. Some grant areas seemed like they should allow more space while other areas should have allowed less space to write.*
	NOFA could be clearer and more concise. Reduce number of attachments to grant such as additional funding sources for large organization.
	A list of required attachments during the pre-application webinar would be helpful.
	Please include budgets in proposals. Some RFPs were vague and didn't provide too much direction on response.
Increase transparency on priorities and decision-making (n=7)	*Seemingly, this foundation's objectives were pre-identified prior to a grant request being made. Majority of funding went to the same entities.*
	Provide examples of what you are willing to fund - improve transparency
	We have all stopped applying because we've come to view it as an impossible task to get funded through this foundation - unless we personally know someone. The organizations that have gotten funding tend to be the ones in which a foundation staff person has a personal relationship with the applicant.
Provide additional application support for smaller and/or "start-up" organizations (n=6)	*The foundation needs to provide more assistance to small/struggling organizations who have great programs to deliver--many have great staff and great track records. It would be useful to have a training and development program.*
	Provide more guidance for "start-up" organizations, e.g., exactly what benchmarks are required in order to be considered for funding.
	There are now components to the proposal process that are difficult for smaller organizations who may not have formal grant-writers. For example-- creating a logic model...not everyone, in fact many people in smaller organizations have no idea what a logic model is. And the webinar can't /didn't really provide a lot of information. So the grant writer/development officer from a smaller non-profit is at a significant disadvantage. The same issue applies when we are asked for a similar project that we can use as a comparison, or take components from. Those resources aren't available to the average small to medium (<$1M budget) non-profit.

Provide constructive feedback to unfunded applicants (n=5)

For those that do not receive a grant, it would be helpful to know how the application could be strengthened in the future. We all know there is limited dollars to give, but it would be helpful to know which area(s) could be improved upon, rather than the standard "not enough money to go around" stock response.

Provide feedback when a grant is not approved that details why, allow for follow up for clarification.

We have always gotten a boilerplate denial with something to the effect of "your proposal was good, but our funding is limited." It would be most helpful to be told why we were turned down. I have heard this complaint from many other non-profit organizations who have applied to HGF many times with no success.

VI.   Grantees' experiences working with the Foundation

In addition to the questions about the application process, the survey also assessed the grantee experience of working with the Foundation. These questions were tailored for respondents depending on which type of grant they received.

Experiences common to all grantees: post-award webinar, requirements for evaluation, and technical assistance

The *post-award webinar* was a new component of the Foundation's grantmaking process. Most respondents' organizations (66%, 47 of 71) participated in a post-award webinar. Seventeen percent "didn't know." Of those who participated, there was unanimous agreement that the post-award webinar was helpful at clarifying grant expectations and requirements.

There was strong agreement that the Foundation's r*equirements for measuring and tracking results of funded projects* were clear and practical (97%, n=69), which was a higher level of agreement than in 2011 (83%).

All respondents (100%) who received technical assistance (TA) through their grant agreed that TA helped their organization take effective action on key organization issues (n=69). Fifteen percent (n=10) of respondents reported that they "did not receive TA." In 2011, 94% of those who received TA agreed that it was helpful, and 23% reported having not received TA.

Our grant has had significant impact in expanding and strengthening our community-based partnership so that we are equipped to lead our community in creating healthier environments. The technical assistance we have received related to policy/programs has been exceptional, and has helped to empower our local community leaders to accomplish long-term goals.

Foundation support for general operating grants

All general operating grant recipients agreed that the grant helped strengthen their organization (n=19). This was an increase in agreement from 2011 when only 81% of organizations agreed (n=21).

Foundation support for "initiative grants"

All initiative grantees who participated in an external evaluation funded by the Foundation, reported that it had helped strengthen how their organization collects and uses data to demonstrate achievements (n=15).

Being a grantee of the Foundation has enhanced our agency's ability to utilize data collection more effectively. The outside evaluation has also contributed to both organizational improvements as well as process improvements. Clearly, the opportunity to work with the Foundation's staff has proven to be very beneficial.

The majority of initiative grantees (87%) met with Foundation staff or consultants during or after the grant was completed to discuss grant results and progress toward objectives (n=15); all who received a visit reported that conversations with Foundation staff or consultants were useful in understanding program impact and identifying areas for improvement. In 2011, grantees who had received visits to discuss grant results also reported the visits to be beneficial.

VII.   Summary and considerations

The Healthcare Georgia Foundation has conducted self-evaluations over the past 12 years, demonstrating commitment to improving its grantmaking practices and grantee experiences with the Foundation. Survey respondents this year, and in recent years, have been from organizations diverse in size, funding status, and region, ensuring that the Foundation has heard from their constituents on a number of vital topics.

Perceptions of the Foundation

As in past years, the results of the 2015 survey are overwhelmingly positive both related to perception of the Foundation and experience working with the Foundation. Unsurprisingly, responses continue to be slightly less positive from unfunded applicants than grantees. Overall, perceptions of how well the Foundation is meeting mission-related goals such as reaching traditionally underserved communities and offering funding opportunities that address a broad range of health topics and special populations are high. There were slightly lower levels of agreement that Foundation activities have been accessible outside of metro Atlanta.

As in 2011, the Foundation is perceived to be effective at meeting its identified outcomes with particularly high ratings for strengthening non-profits, advancing health policy, and expanding access to care for underserved populations. The Foundation is less recognized as an incubator of new health organizations, mostly because there were a high number of respondents who did not have enough information to assess the outcome.

Learning about the Foundation

Respondents learned about the Foundation in a variety of ways; the Foundation website continues to be the source of information that most respondents identified as useful. There were lower levels of awareness of the Foundation's social media presence, press releases, and information produced by grantees. Notably, it appears that grantees were more likely to learn about the Foundation from direct sources, whereas unfunded applicants were more likely to hear from external sources.

Application and Pre-Award Process

Similar to previous surveys, respondents provided very positive feedback about the application and pre-award process. It appears that the significant application changes in 2012 did not have a negative impact on experiences with the application process. The online application had the lowest level of agreement, but agreement was still fairly high. Unfunded applicants had lower levels of agreement about how understandable and fair the review process and decisions were, this was reinforced by several open-ended comments that asked for more feedback about why a proposal was denied and some perception (from a minority of responses) that you have to be an "insider" to get funding from the Foundation. Most indicated they were comfortable asking for more information if a proposal was denied, but several still had feedback about the communication process.

Respondents valued time to meet with Foundation staff and consultants prior to grant decisions, during the grant and after the grant was completed, reporting that these conversations were helpful at each stage of the grantmaking process. In addition, the newly added pre- and post-award webinars have been positively received.

The Evaluation Resources Center (ERC) and evaluation support are notable in the survey. Initiative grantees were positive about their experience in external evaluations funded by the Foundation and the ERC was identified as the second most useful resource for learning about the Foundation. When respondents were asked to provide three words to describe the Foundation, the words "evaluation/data-driven" came up most frequently.

Considerations

Based on the responses to the survey, we offer the following considerations for the Foundation to strengthen grantmaking practices.

➢ **Increase the visibility of materials about the Foundation**. Data from this survey suggest that organizations who already know about the Foundation are receiving information in a variety of ways but information may not be reaching all who would be interested. Consider using non-traditional communication methods to reach out to a broader audience. More specifically, visibility of several aspects of the Foundation's work could be increased, including:
  o The Foundation's social media presence
  o The Foundation's work and investments outside of the Atlanta metro area
  o The Foundation's role as an incubator of new health organizations

➢ **Consider ways to make funding more accessible to small and/or new mission-aligned organizations that may not have a relationship with the Foundation.** Suggestions from respondents included:
  o Provide additional feedback to unfunded applicants after a proposal is declined, or more information on funding decisions
  o Provide increased application support to smaller organizations to help them prepare a successful application.

➢ **Continue to periodically assess grantee experience with the Foundation.** While grantee feedback remains relatively consistent across years, it is important to continue to seek feedback as the Foundation makes modifications to its grantmaking practices, communication methods, and the nature of its relationships with grantees and applicants. With future surveys, the Foundation should consider balancing:
  o Asking similar questions for comparison with previous years
  o Adding new questions to capture perceptions about new efforts and priorities

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*This report was prepared by the **Center for Community Health and Evaluation** (CCHE), which is part of Group Health Research Institute based in Seattle, Washington. CCHE designs and evaluates health-related programs across the United States. We partner with foundations, nonprofits, and government agencies to help assess the impact of community investments and figure out what works to improve health. For more information about CCHE, visit our website: www.cche.org*

Appendix A

Foundation Grant-making regions Represented by Survey Respondents, 2011 & 2015

Foundation Regions	Counties	Number of Responses 2011 (n=81)	Number of Respondents 2015 (n=112)
Region 1 Northwest, Dalton	Bartow, Catoosa, Chattooga, Cherokee, Dade, Fannin, Floyd, Gilmer, Gordon, Haralson, Murray, Paulding, Pickens, Polk, Walker, Whitfield	3 (4%)	3 (3%)
Region 2 Gainesville	Banks, Dawson, Forsyth, Franklin, Habersham, Hall, Hart, Lumpkin, Stephens, Towns, Union, White	2 (2%)	0 (0%)
Region 3 Metropolitan Atlanta	Clayton, Cobb, DeKalb, Douglas, Fulton, Gwinnett, Newton, Rockdale	52 (63%)	67 (60%)
Region 4 LaGrange	Butts, Carroll, Coweta, Fayette, Heard, Henry, Lamar, Meriwether, Pike, Spalding, Troup, Upson	3 (4%)	2 (2%)
Region 5 South Central, North Central	Baldwin, Bibb, Bleckley, Crawford, Dodge, Hancock, Houston, Jasper, Johnson, Jones, Laurens, Monroe, Montgomery, Peach, Pulaski, Putnam, Telfair, Treutlen, Twiggs, Washington, Wheeler, Wilcox, Wilkinson	4 (5%)	8 (7%)
Region 6 Augusta	Burke, Columbia, Emanuel, Glascock, Jefferson, Jenkins, Lincoln, McDuffie, Richmond, Screven, Taliaferro, Warren, Wilkes	2 (2%)	2 (2%)
Region 7 West Central	Chattahoochee, Clay, Crisp, Dooly, Harris, Macon, Marion, Muscogee, Quitman, Randolph, Schley, Stewart, Sumter, Talbot, Taylor, Webster	1 (1%)	1 (1%)
Region 8 Southwest, Valdosta	Baker, Ben Hill, Berrien, Brooks, Calhoun, Colquitt, Cook, Decatur, Dougherty, Early, Echols, Grady, Irwin, Lanier, Lee, Lowndes, Miller, Mitchell, Seminole, Terrell, Thomas, Tift, Turner, Worth	2 (2%)	9 (8%)
Region 9 Southeast, Coastal, Savannah	Appling, Atkinson, Bacon, Brantley, Bryan, Bulloch, Camden, Candler, Charlton, Chatham, Clinch, Coffee, Effingham, Evans, Glynn, Jeff Davis, Liberty, Long, McIntosh, Pierce, Tattnall, Toombs, Ware, Wayne	8 (10%)	12 (11%)
Region 10 Athens	Barrow, Clarke, Elbert, Greene, Jackson, Madison, Morgan, Oconee, Oglethorpe, Walton	3 (4%)	6 (5%)
Statewide	All Counties	2 (2%)	2 (2%)

Appendix B

Words and phrases respondents use to describe the Healthcare Georgia Foundation. Respondents (n=111) entered 325 words and phrases.

- A Blessing to the underserved
- Academic
- Academically focused
- access to primary care in rural areas
- Accessible
- Accessible
- Accessible
- accessible
- Accessible
- accessible
- Accessible
- accessible
- Accessible
- Accessible
- accountability
- Action oriented
- Addressing needs
- Advocacy and
- advocate
- Advocate
- Advocate for underserved populations
- aim for a public health approach
- aligned
- Almost impossible to receive a grant
- Amenable
- An advocate of Public Health
- Appropriate

- are committed to evaluation
- Assessing community needs
- Assist in eliminating barriers to care
- Attentive to needs
- Aware
- Awesome
- big
- Broad
- Bureaucratic
- Bureaucratic
- capacity building
- capacity building grants
- Careful
- caring
- Caring
- Caring
- Caring
- Caring
- Caring
- caring for the health of underserved populations in Georgia
- Charitable
- Clear in their expectations
- Clinical care support
- closed to non-traditional requesters
- collaborative
- collaborative
- Commitment to health for underprivileged
- committed
- committed
- Committed
- Committed to HEALTH as well as Healthcare
- committed to health equity
- committed to health of

- all Georgians
- Committed to healthcare
- Committed to Public Health Improvement in Rural Communities
- Committed to under-served populations
- Community
- Community
- Community Engaged
- Compassionate
- Compassionate
- Concerned
- concerned
- concerned about diversity and inclusiveness
- Connect
- Connected
- Consistent
- Consistent
- consistent
- Creative
- Creative
- Critical funding source for community-based initiatives
- Culture of excellence
- Daring
- Data driven
- Data-based in its evaluations
- Dedicated
- Dedicated
- Dedicated
- dedicated to bringing health to community
- Dedicated to change
- Dedicated to the health improvement of underserved populations.
- Delves deeper than surface solutions

- detailed
- Difficult grant process
- Difficult to satisfy
- Difficult to work with
- Disparity
- Diverse
- Diverse - in funding, in offerings and in organizational support
- does not give enough support to new organizations
- efficient
- Effective
- Effective
- Efficient
- Engaged
- Engaged
- equitable in funding
- equitable in terms of region and health issue
- evaluation
- evaluation
- Evaluation
- Evaluation
- evaluation and metrics
- evaluation-based
- Excellence
- Excellence in staffing
- excellent communication
- Expanding access
- Expands networking opportunities
- Extremely helpful
- Fair
- Fair
- Flexible
- flexible
- Flexible
- Flexible
- Focused
- Focused
- Focused

- Focused
- Focused on helping others
- forward thinking
- Forward thinking
- Forward Thinking
- forward-thinking
- forward-thinking
- Forward-thinking
- Foundation
- Funding seems to depend a lot on who you know, not what you do
- Generous
- Georgia Based
- giving
- Giving
- good stewards
- go-to location to seek scarce local resources in GA
- Grantmaker
- great advocate
- Great staff
- Has lots of funding, but hard to get it
- Health
- Health Care Funding in Georgia
- health focused
- health focused grants
- health IT
- healthcare
- healthcare
- Healthcare
- healthier environments and communities
- help
- Helpful
- Helpful
- Helpful
- Helpful
- Helpful
- Helpful

- Helpful
- helpful resource
- High quality
- High quality products
- Ignorant about mental health
- Ignoring the mental health crisis in this state
- impactful
- Impactful in that they do great work
- Improving healthcare quality, access, and services across GA
- In depth application process
- In touch with today's non-profits
- Inclusive
- Informative
- Informative
- informed
- informed
- Innovate
- Innovative
- Innovative
- Innovative
- Innovative
- Innovative
- inside the perimeter
- insightful
- Insulated
- intelligent
- Interested in equalizing access
- Invested
- involved
- Knowledgeable
- Knowledgeable
- Knowledgeable about health disparities in and around GA
- Large footprint in community

- leader
- leader
- leader
- Leader in conversation/work about reducing health disparities in GA
- Leaders to bring health services to others!
- Leadership
- Leading
- Limited opportunities
- Marginalized Communities
- measurable evaluation results
- medical
- Mission Driven
- N/A
- Narrow in focus
- Needed
- needs to provide info to applicants about why not funded
- Niche
- Not accessible
- Objective
- opaque
- Open
- Open to serving in any area of an agency
- Opportunity
- Organized
- Organized
- Organized
- organized
- Organized
- Organized
- Oriented toward evaluation
- Outcomes focused
- partial to ""insiders,"" hard to break in to by newbies
- Partnerships between agencies
- Personal in responsiveness
- Philanthropic
- policy leader
- positive healthy outcomes and objectives
- Prevention
- priority on access to care
- Proactive
- Proactive
- proactive
- Proactive
- Professional
- Professional
- professional
- professional
- Progressive
- progressive and responsive to non-profit needs
- Proponent of evidence based practices
- Public health focus
- purpose
- quality
- Reaching and expanding rural healthcare initiatives in GA
- Relevant
- Relevant
- Reliable
- Reliable
- research based
- research-based strategies
- Resource for Learning
- Resourceful
- responsible
- responsible
- Responsive
- responsive
- Responsive
- Responsive to regional needs
- results oriented
- Rigid
- Scientific
- Seeks to improve healthcare
- Sensitive to community needs
- Service
- Serving
- significant support
- Socially just in its activities
- Solutions
- strategic
- Strategic
- Strategic Facilitator for GA healthcare and health-related non-profit orgs to encourage collaboration
- Strategic in its planning
- Stringent policies; challenging process
- striving for excellence
- structured
- structured
- support
- Support
- Supporting providers
- Supporting Underserved Populations
- Supportive
- Supportive
- supportive
- supportive
- Supportive in working with grantees
- Supportive of policy changes
- Targeted
- tedious

- Think outside the box to make life better for others!
- Thorough
- Thoughtful
- thoughtful
- Thoughtful
- Thoughtful
- thoughtful (in their overall approach, building capacity of nonprofits and program funding is a fresh approach for a foundation)
- Timely
- Traditional approaches to grant making
- Trailblazers
- truly reach out to state and collaborate
- Trustworthy

- two grants a year
- Underserved
- Understanding
- understanding
- Understands and requires strong fundamentals of health promotion programs from planning through evaluation
- Understands that there are no blanket solutions because circumstances and issues vary across the state
- user friendly
- user friendly
- Utilizes evidence based programs to make a change
- very approachable
- very involved with

- grantees
- very proactive
- visionary
- visionary
- Want organizations to succeed
- Well informed of foremost health issues/needs in underserved communities in GA
- Well managed with strong structure
- Well meaning
- Wide reaching
- Widely available to all applicants

Appendix C
Suggestions to improve the application process from Healthcare Georgia Foundation grantees and unfunded Applicants (n=47).

- Excellent, well-organized process. No suggestions.
- Some matters of concern to the Foundation seem peripheral to the issue of access to healthcare, i.e., demographic composition of board members. Let's not mingle social agendas with deciding if to support the proposed work. I'm certain the uninsured have no care whatsoever how many women and minorities are on the nonprofit organization's board.
- I would hope that Veterans Health would become a component of the Foundation's grant process.
- Consider helping smaller non-profits
- The application is straightforward, and I appreciate the staff's time in answering all my questions.
- Provide more guidance for ""start-up"" organizations, e.g., exactly what benchmarks are REQUIRED in order to be considered for funding.
- Resolve confusion between line-item PROGRAM EXPENSES and general organizational support
- The last grant application/announcement only funded a small number. When the competition is so high, some organizations will drop out because they don't feel they have a chance.
- More opportunities for new healthcare organizations and those organizations that support them.
- Please include budgets in proposals. Some RFPs were vague and didn't provide too much direction on response.
- We are a strong voice for children and families of Southwest Georgia through our Phoebe Putney Network of Trust School Health Program. We want you all to know we are here to help you in any way we can to bring your good news to the folks in South Georgia! We look forward to working with you as we all carry the mission to serve all who are in need! Thank you for sharing with all of us! Angie Barber and The Network of Trust Team!
- The biggest issue is that I haven't gotten feedback on why my organization's proposals have been turned down over and over again. We have always gotten a boilerplate denial with something to the effect of ""your proposal was good, but our funding is limited."" It would be most helpful to be told why we were turned down. I have heard this complaint from many other non-profit organizations who have applied to HCG many times with no success. We have all stopped applying because we've come to view it as an impossible task to get funded through this foundation - unless we personally know someone. The organizations that have gotten funding tend to be the ones in which a foundation staff person has a personal relationship with the applicant.
- We were a new organization that hadn't filed tax returns or prepared financials, and I called about how to handle the required attachments in this case. I followed the instructions given

over the telephone and later discovered that our application was never read because the application was incomplete.

- Provide examples of what you are willing to fund - improve transparency
- I cannot comprehend the logic model in light of what our clinic did for the community. We are closing due to a dramatic decrease in patient volume. (ACA health plans are a big factor. Most of our patient population has insurance now.)
- Address the mental health crisis in this state through funding opportunities.
- NOFA could be clearer and more concise. Reduce number of attachments to grant such as additional funding sources for large organization.
- consider a broader range of healthcare vs restricted to medical care
- It is unfortunate that universities can no longer apply for funds to serve underserved persons.
- I called for guidance on whether I should apply and got a dismissive answer. I asked if we could come in and talk to see if we were a fit, but Healthcare Georgia bluntly told me you did not meet with candidates prior to funding. I spent hours working on the application, which probably was not a viable request, although we met all of the qualifications and aligned with your purpose. Other foundations display a little more respect and courtesy for non-profits with big missions and small staffs. If you know you will only give to those places where you have long-standing relationships, don't make us dedicate hours to work that is futile and misdirected. Our tasks are too great.   I know Healthcare Georgia puts its trust and funds in places they can count on to be good stewards. I also know Healthcare Georgia does not allow us in to tell our story, so that they can get to know us.
- Would love to be able to submit online. Wasn't sure that was an option.
- Seemingly, this foundation's objectives were pre-identified prior to a grant request being made. Majority of funding went to the same entities.
- For those that do not receive a grant, it would be helpful to know how the application could be strengthened in the future. We all know there is limited dollars to give, but it would be helpful to know which area(s) could be improved upon, rather than the standard ""not enough money to go around"" stock response.
- I was not given any feedback to respond to funding decisions that are understandable and fair.
- I submitted a grant application of behalf of Central Ga. Rails to Trails last summer (2014) and NEVER received any response from the Foundation.....accepted, rejected, no reply at all. daveterrell77@cox.net
- The foundation needs to provide more assistance to small/struggling organizations who have great programs to deliver--many have great staff and great track records, It would be useful to have a training and development program. It seems that only the savvy grant applicants get funded.
- I think the process for brand new grant applicants can be overwhelming and that maybe an orientation might be helpful.
- I think it works well for evaluators. No suggestions.

- Make sure website for new grant is current. When we first looked there was an old grant on there. Maybe try it out with someone before going live. 2. Make instructions easier to follow. Again maybe try out with someone ahead of time. 3. For grants that are continuation projects, sometime the guidelines or Foundation emphasis changed from year to year. This impacted our processes. For example, initially we were told to use a needs assessment to identify our focus, which we did and began to incorporate in a routine way as a ""best practice"". But in later years, the Foundation asked us to focus on different topics, which interrupted our ""best practice"" routine. Sometimes it seems that guidelines and expectations seemed to change from year to year for the same grant initiative. 4. Despite the above comments, the Foundation provides great resources and is generally collaborative in its work with its grantees.
- A list of required attachments during the pre-application webinar would be helpful.
- I thought the process was very easy.
- The evaluation technical advisor is wonderful! She is extremely helpful and understands real-world evaluation challenges. However, my program person does not always seem to be familiar with our stated goals and objectives, demonstrates a somewhat defensive posture in her communications with us, and rarely answers specific questions we may have. This rather defensive communication pattern (e.g., starting sentences with ""You should have..."") occurred from the very beginning (when more information was requested during the review process) and arose again during our call to review our 6-month report. In my many years of working with funders, I have never experienced this almost adversarial approach and lack of awareness of the stated goals, objectives and strategies, causing us to defend activities and point out where they were clearly explained in detail in the report.
- Although I prefer how concise we must be when submitting, it is unclear as to how this decision was made. Some grant areas seemed like they should allow more space while other areas should have allowed less space to write.
- There are now components to the proposal process that are difficult to smaller organizations who may not have formal grant-writers. For example-- creating a logic model...not everyone, in fact many people in smaller organizations, have no idea what a logic model is. And the webinar can't /didn't really provide a lot of information. So the grantwriter/development officer from a smaller non-profit is at a significant disadvantage. The same issue applies when we are asked for a similar project that we can use as a comparison, or take components from. Those resources aren't available to the average small to medium (<$1M budget) non-profit.
- I've found the Foundation to be responsible and reasonable in all of our requests. The online process isn't complicated or cumbersome. The foundation staff have been extremely helpful.
- Provide feedback when a grant is not approved that details why, allow for follow up for clarification.
- Cannot think of any at the current time. I represent an organization that has newly received a grant opportunity, so while everything has been great so far throughout the process, I may be able to identify areas for improvement in a future survey.

- You all are doing a great job in addressing health issues for all of Georgia and proactively help nonprofits to better serve the underserved. Thank you for all you do!
- Need more work in drawing the broader community
- Ensure all aspect of application work prior to launching.
- The Foundation's application process is user friendly. No suggestions for improvement offered.
- I very much appreciate the support we received in tightening up our evaluation plan and indicators. Staff seems concerned and connected to the grantees.
- I cannot speak to any method which the Foundation can use to improve its application process because I am part of an organization that is a relatively new grant recipient. However, all of the experiences I have had thus far regarding communication and assistance from the Foundation's staff as well as online tools and resources have been excellent.
- Congratulation on your successful programs and grants. I have no suggestions as to how to improve the application processes.