

Feedback on the Joffe Charitable Trust

10th December 2018

1. Introduction

As previously discussed with the board, we asked the people we work with for feedback on the Joffe Charitable Trust. This report summarises the process, responses and main findings. The full data set of all responses is available in the attached Excel file.

Feedback was invited using a [simple survey on SurveyMonkey](#), comprising 5 questions:

1. Name of your organisation (optional, free text answer)
2. What did you appreciate about how the Joffe Trust worked with you?
Please mention what that they should keep doing in the future.
(mandatory, free text answer)
3. What should the Joffe Trust improve about how it worked with you?
Please give suggestions about what they can do better. (mandatory, free text answer)
4. Overall, how do you rate your experience of working with the Joffe Trust compared to working with other donors? (Mandatory, quantitative rating, scale of -5 to +5)
5. Any other comments (optional, free text answer)

Feedback was invited by an email sent by Alex to 112 people on 27th Nov and kept open until 7th Dec 2018. The recipients included: all our current grantees, current collaborators (such as on recent convenings), recent previous grantees, current applicants and recent rejected applicants. The list did not include other donors we collaborate with, for simplicity's sake. Wherever possible, feedback was requested from two people in the same organisation in order to increase the chance of getting a response.

Recipients were told that the purpose of the survey was to help the Joffe Trust learn and improve our work. Respondents could provide feedback anonymously, if they preferred to.

Respondents were asked to base their answers on their actual experience of working with the Trust over the last year, or their most recent grant. This includes the period from the end of 2017 to April 2018 when the Trust had very limited executive capacity. Some comments clearly refer to this period, such as not responding to reports submitted. Most comments are assumed to refer to the more recent period of Alex's executive involvement from April 2018 onwards.

After responses were received, the status of each organisation was manually added by the Joffe Trust.

2. Responses

All findings should be carefully considered in the light of the power relationship we hold as a donor, including among current grantees and applicants. Many people have good reasons to give us positive feedback. While this was mitigated by the design of the survey, allowing anonymous on-line responses, it was by no means eliminated.

58 responses were received, a response rate of 52%. This high response rate is encouraging, showing that people think it is worth the trouble of giving us feedback. The following number of responses were received from respondents in each 'status' category.

Status	No. responses
Applicant	8
Collaborator	9
Current grantee	26
Previous grantee	7
Rejected	3
Unknown	5
Total	58

3. Findings

Qu 2: What respondents appreciated and would like the Joffe Trust to continue doing in future.

The most frequent areas that respondents said they appreciated were:

- Accessible staff & timely responses to **communications**, including the opportunity to meet with staff & trustees in person and explore issues and develop ideas together.
- Personal, friendly, professional & **supportive** approach, showing genuine interest in the work & organisations and respect for people's time. The sense of being "on grantees' side".
- **Flexible** approach, supporting hard-to-fund causes and providing multi-year & unrestricted funding.
- Thoughtful & **informed engagement** with strategy & content, providing leadership and advice in some cases.
- Encouraging effective **collaboration** among organisations, including through convening events and making introductions.
- **Simple application and administrative processes**, with honest feedback, a two stage application process, simple reporting and prompt payment of funds.
- Sending written **responses** to grantees' reports.

Qu 3: What respondents would like the Joffe Trust to improve.

The most frequent requests for areas for the Joffe Trust to improve were:

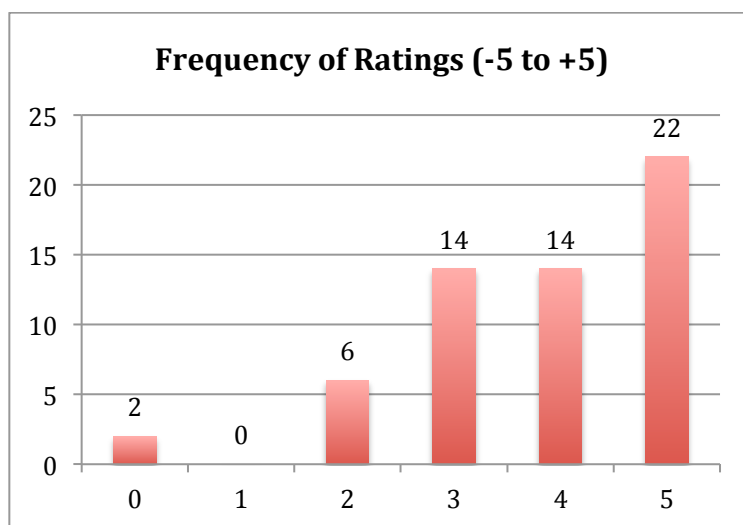
- More information about current / previous grants on our **website**, in line with 360 Giving standard, and cut-off dates for future board meetings.
- Stay aware of **power dynamics** when working with civil society organisations, e.g. when collaborating on strategising or campaigns.
- Provide **more leadership** and play a more prominent role in the sector, including **convening other funders**.
- **Better communication** and feedback on reports received (by email or phone), including who interviewees are likely to meet at interview.
- Be clear as early as possible about the **likelihood of providing / not providing follow on grants**.

There were also a scattering of comments along the lines of “give us more funding”.

This question was mandatory. 24 respondents (41%) answered that they could not think of any improvements. Many gave very positive comments about working with the Trust instead.

Qu 4: Quantitative rating

This question was intended to provide a summary satisfaction rating that reduced the inherent bias involved in surveying donor behaviour. It may have appeared bald as the only quantitative question, and could potentially have worked better if accompanied by another similar question. It may have been unrealistic to invite respondents to give a negative rating, even in comparison to other donors. However, it is striking that no respondents gave the Trust a rating as being worse than other donors, despite being invited to consider doing so.



The average rating across all respondents was 3.8, which can be seen as very positive. This is reflected in many positive written comments, in response to other questions.

The two '0' ratings were received from: (a) a previous grantee whose application for a follow on grant was rejected at the last board meeting, and (b) an applicant with whom we've only had limited initial contact, not even yet finalising a short concept note.

Qu 5: Other comments

The most frequent comments made in response to this final open question that are not already covered above were:

- Recognition that the Trust funds 'hard-to-fund' causes, including new initiatives, radical work, back office costs and non-charities.
- Positive comments about working with Carin and Alex.
- Appreciation of the Trust asking for feedback through this survey.
- Appreciation of the Trust's emerging role as a significant player in the field of corruption and tax justice.

To finish on a high note, here are some of the positive written comments. Very few negative comments were received, and they are all covered in the analysis above.

"The Joffe Trust is ... our smallest funder. But we consider it our most important not only because we are a part of Joel's legacy and the values he espoused but because of the wise, personal and constructive counsel we receive. As we grow, this engagement is invaluable and we hope this partnership lasts for many years beyond our three year current." – Finance Uncovered

"I think the way that the trust is approaching things at the moment, such as developing a strategic analysis of the overall field, is fantastic. ... The trust is becoming a key player in the illicit finance area and this is very welcome." – Corruption Watch

"Please keep funding attempts to make organisations more financially sustainable. It's so so important and is a gap in the funding market." – Consortium for Street Children

"Thank you for your support of your work. You "betted" on us when we were still very new, and where others feared to tread." – Just Detention International (RSA)

"In my experience, the Trust's thoughtful and selective approach has meant it has had a much higher bang for its buck than almost any other funder I can think of." – Transparency International

"I have found the Joffe Trust such a breath of fresh air. ... Overall, the experience has been one of the best with donors. For a small NGO that does not have a "fundraising department" the streamlined nature of the process was very welcome indeed." - Anonymous