

Feedback on the Joffe Charitable Trust

18th November 2019

1. Introduction

This report summarises grantees and others' feedback on their experience of working with the Joffe Charitable Trust during 2019.

In the first two weeks of November 2019, we asked 120 individuals to give us anonymous feedback on their experience of working with us during 2019. We emailed them personally twice, asking them to fill in an on-line survey at [GrantAdvisor](#) before a specific deadline. The individuals included: current grantees, current collaborators, recent previous grantees, current applicants and rejected applicants. We did not include other donors we collaborate with, for simplicity's sake. We asked two people from each organisation where possible, to increase the chance of getting a response.

This year, we used GrantAdvisor whereas last year we used our own questionnaire on SurveyMonkey. We made the change to GrantAdvisor for three reasons:

- It enables feedback to be entirely anonymous, and it provides a central, public record of all feedback in ways that may be useful to future applicants. You can [see our public profile & feedback here](#).
- We want to contribute to a new sector-wide initiative that can help all grant-makers collect and use feedback better.
- In future we may be able to compare the feedback we receive with the feedback given to other grant-makers. However, there is not enough data on the site for this to be useful yet.

It was easy to use GrantAdvisor. We did not have to go the trouble of setting up our own survey or designing our own questions. On the other hand, we could not have adapted the questions if we had wanted to. Their questionnaire was short and appears to have been reasonably quick for respondents to fill in. It included more questions than we asked last year, when we kept the questionnaire to an absolute minimum. It did not include an overall quantitative rating.

GrantAdvisor is primarily geared towards the needs of future grant applicants rather than directly towards grant-makers. Given the limited bandwidth for collecting feedback, this focus on public benefit for future applicants seems appropriate, rather than private learning by grant-makers.

2. Responses

Over a two week period, we received 41 responses, which is a response rate of 34%. This is reasonably high, though lower than last year's response rate of 52%.

Responses:

Relationship	2019	2018
Current or former grantee	29 (71%)	33 (57%)
Applied and not funded	6 (15%)	3 (5%)
Did not apply	2 (5%)	-
Grant currently pending	4 (10%)	8 (14%)
Other	-	14 (24%)
Total	41 (100%)	58 (100%)

The categories used in 2019 are defined by GrantAdvisor. In 2018, the 'other' category includes 'collaborator' and 'unknown' relationships. We received more responses in 2019 from people who we did not fund and fewer from other collaborators. This may be due to GrantAdvisor's focus on the grant-making relationship.

3. Findings

3.1 Qu: Imagine a colleague is thinking of approaching JCT. They ask what you think they should know as they start their quest. What do you tell them?

41 (100%) respondents answered this question. The most frequent areas they mentioned were, in their own words:

- **Contact JCT early on.** They are easy to engage with, supportive and know what they are talking about. They take a personal approach, listen well and are open to new ideas. They will give you honest and constructive feedback. Keep them in the loop. Double check their appetite to receive your application. (16 mentions)
- **They genuinely want to help the charities they support** and help build capacity. They are willing to fund core costs. They understand the challenges that small NGOs face and ask the right questions to help each charity thrive into the future. Be prepared for some detailed questions on strategy and finance. They are a flexible and imaginative funder. (11 mentions)
- **Research JCT's interests** and what they have funded before. Make sure you fit their criteria, including their interest in economic justice, international development and work that is risky / hard to fund. (10 mentions)
- **Be open, honest and straightforward** in your approach. Tell them about challenges and pose realistic solutions. They are less interested in a polished pitch and more on having an honest conversation. The Director and the trustees (at interview) were engaging and fostered an open relationship. (6 mentions)
- **Their process is straightforward and light.** The two stage process of an initial email and then full application works well. You don't have to spend hours trying to mould your project into complicated formats. (6 mentions)

- **Be clear about your objectives** and how you will achieve them in the real world. (3 mentions)

3.2 Qu: Tell us one thing that JCT does really well.

38 (93%) respondents answered this question. The most frequent areas they mentioned were:

- **Good communication.** Provides open, honest and constructive feedback on applications. Does not impose its views. Clear about what they need. Down-to-earth and well connected to the realities of small charities. (14 mentions)
- **A personal approach** and relationship with grantees, approachable and engaged. JCT are very supportive, collaborative and encouraging. Allows you to save time by having a chat before inviting you to apply. (8 mentions)
- **Willing to support 'hard-to-fund' work** that may struggle to get funding elsewhere. Supports nascent organisations. Brilliant at early seeding of new ideas. Funds core costs and provides flexible funding. (8 mentions)
- **Gives solid advice** on strategy and organisations. Acts as a sounding board. Really good at strategic thinking and organisational support. (6 mentions)
- **Processes are simple** and appropriate. Reports are not overwhelming to write. Does not make unnecessary demands on grantees. The two stage application process works well. (4 mentions)
- **Brings together different actors** in the sector rather than leaving us to compete. Looking to build an ecosystem of NGOs working on tax and corruption that is impactful and coordinated. Forthcoming with introductions to other relevant funders and stakeholders. (4 mentions)

3.3 Qu. If you had one piece of advice to give to JCT, what would it be?

26 (63%) respondents answered this question. 5 of the responses were "no comment". 8 said "keep doing what you are doing". 15 respondents did not answer at all which implies that they like the way we currently work.

11 respondents made substantial comments which were:

- *"Look to long term objectives. ... Some projects need time."*
- *"Provide updates on when to apply."*
- *"Keep up the flexible approach you have to supporting small organisations."*
- *"Grow your funds so you can fund more and for longer. Could you scoop funds from the family offices of others with a particular sympathy for Lord Joffe's legacy?"*
- *"Keep facilitating networks or learning events as this is a great bonus especially for small organisations."*
- *"Have an on-line space or newsletter for grantees, so that the overall programme adds up to more than the sum of its parts. Share ideas about plans for the future."*

- *“Offer more detailed feedback when you send a rejection letter.”*
- *“Continue to support great organisations working on transparency / accountability in South Africa.”*
- *“It’s quite hard work for a small charity to receive funding for half or two-thirds of a proposal. It sometimes means that the grant cannot be accepted because the project cannot go ahead.”*
- *“Work a little closer with prospective organisations to see the wide impact Joffe could have.”*
- *“Deepen / extend annual reporting to include specific Key Performance Indicators.”*

3.4 Other findings

- All 40 respondents rated our accessibility as ‘good’, on a three point scale of ‘good, average and bad’. Comments included:
 - *“Very accessible. Appreciate opportunity to shape ideas and receive feedback over a coffee or relaxed email.”*
 - *“Extremely good – for such a lean organisation they are responsive & interested.”*
- 36 respondents rated the extent to which we are achieving our goals as ‘good’ on the same three point scale. One rated this as ‘average’. Three did not answer. Comments included:
 - *“Very successful in goal to build stronger not for profit organisations.”*
 - *“Few funders support organisational development, this is an exemplary funder.”*
 - *“I greatly appreciated the reception to meet other recipients and the way the Trust engages with ... recipients to develop progressive policies. Really welcome!”*
- When asked whether their relationship with JCT was positive or negative, all 40 respondents selected positive. When asked to select descriptors for the JCT from a pre-determined list, respondents chose:
 - 33 x Builds relationships; 32 x Friendly; 31 x Openminded; 31 x Responsive; 28 x “Gets” nonprofits and issues; 27 x Insightful; 26 x Gives more than money; 25 x Positive leaders in the field; 23 x Risk taker; 9 x Culturally sensitive; 4 x Likes site visits
 - Respondents would only have been invited to identify negative descriptors if they had selected ‘negative’ for the overall relationship.
- On average, respondents said that it took them 10 hours to complete our grant application process. From the limited data currently available on GrantAdvisor, this seems to be lower than the average of other grant-makers.

4. Comment

The feedback is overwhelmingly positive.

There may have been a selection bias in respondents. People who have a closer relationship with JCT may have been more likely to respond. Those who do not work so closely with us may have been less likely to respond. In addition, the inherent power dynamic is likely to generate a positive bias towards grant-making donors.

Having said that, the response rate is good at 34% and includes a number of applicants who we rejected. This survey was entirely anonymous, whereas last year only 9 respondents opted to be anonymous. The survey was well crafted, providing respondents with the opportunity to give frank advice within a constructive framework.

The major finding that comes through is that respondents greatly appreciate the way we work and want us to continue it. This is evidence that we are working in line with the principles and approach set out in our Strategic Framework, and that the Strategic Framework is broadly appropriate.

It is very encouraging that we are seen to be open, honest, informed and supportive. Our application and reporting processes are seen to be light and proportionate. We are recognised for supporting hard-to-fund work and core costs, as well as giving good strategic advice, engaging in the issues and helping bring organisations together to build movements.

We have made progress since last year. In the 2018 survey, respondents particularly asked us to improve by:

- improving our website and information about current and previous grants,
- communicating better, including giving better feedback on reports,
- providing more leadership and playing a more prominent role in the sector.

We addressed these points during 2019 and see the result of that in this year's feedback.

There is scope for us to improve. In response to the specific suggestions made, we should:

- Consider more carefully the negative effect of making a grant that only part funds an application.
- Publish the dates for our upcoming application deadlines on our website.
- Consider additional ways of working with others, possibly including a quarterly newsletter.
- Consider how we can help people learn more from rejected applications. Giving more detailed feedback in rejection letters can risk getting into fruitless discussion about grant decisions. But there may be other approaches, such as offering a follow up call.
- Consider whether to try to raise more capital for the Trust, though this may be difficult. We should also continue to look for ways of working in partnership with other donors.

5. Quotes

- *“They are supportive and informed. They know what they are talking about, and what the issues are in the sector, and are happy to give core funding.”*
- *“The Joffe trust are really good at strategic thinking and giving organisational support. They are very supportive and collaborative funder and very encouraging.”*
- *“This funder is very well connected to the realities of smaller charities, and supports their work flexibly.”*
- *“Provides open, honest and constructive feedback.”*
- *“I see the Joffe Trust as a pathway funder – an indicator to others. It succeeds in that goal.”*
- *“Keep doing what you’re doing – it’s invaluable.”*