

Joffe Charitable Trust: Annual Feedback Report 2020

6th November 2020

1. Introduction

This report summarises feedback received from grantees and others on their experience of working with the Joffe Charitable Trust during 2020.

From 21st October – 4th November 2020, we asked 313 people on our mailing list to give us anonymous feedback about their experience of working with us over the last year. We emailed them personally twice, asking them to post a review at <https://grantadvisor.org.uk/> (a free on-line service) before a specific deadline.

The mailing list included everyone signed up to receive our newsletter. It included a mix of: grantees, collaborators, current applicants and unsuccessful applicants. This was a larger list than previous years, when we selected 120 people to ask for feedback. It included a wider range of people, such as grantees from several years ago and other funders we work with.

All the reviews we received are publically available in full on GrantAdvisor's website. Our previous years' feedback reports are available on our website.

Other funder feedback initiatives

The funders John Ellerman Foundation and Luminate have also recently undertaken feedback surveys¹. John Ellerman joined a group of nine donors for a benchmark study conducted by nfpSynergy. Luminate commissioned the Center for Effective Philanthropy. Both will have cost more than GrantAdvisor and taken more time. Both will provide more independent, tailored, private and fine grained findings, with much stronger comparative data. The data they generate may not be published.

2. Responses

Over a two week period, we received 61 reliable reviews (2019: 41), which is a response rate of 19% (2019: 34%). We received one other review which had very little data in it, which we do not believe was reliable. We believe the fall in response rate is due to the increase in the number of people we asked for feedback. We are encouraged that the overall number of responses increased by 49%.

¹ See <https://www.greenfunders.org/2020/10/16/seeking-feedback-as-a-funder-asking-questions-and-being-ready-to-act-on-the-answers/> and <https://luminategroup.com/posts/blog/listening-and-learning-for-better-partnership-luminates-gpr-findings>

Responses:

Relationship	2020	2019
Current or former grantee	44 (72%)	29 (71%)
Applied and not funded	2 (3%)	6 (15%)
Did not apply	14 (23%)	2 (5%)
Grant currently pending	1 (2%)	4 (10%)
Total	61 (100%)	41 (100%)

Most respondents have recent experience of working with the Joffe Trust. 70% said they were commenting on work in 2019/20. And 15% said they were commenting on 2018. The rest stretched from 2017 to “before 2014”.

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?

61 (100%) respondents answered this question. The most frequent areas they mentioned were, in their own words:

- Talk to the staff. Have an informal conversation first and maintain a dialogue. The staff are approachable, professional and honest. They take a genuine interest in organisations and the sector. They give guidance on what the Trust is looking for. (27 mentions)
- Be clear about your objectives and the change you want to see in the world. Explain how your work fits into the wider sector and complements existing networks. (9 mentions)
- They like honesty and transparency, and work in a very personalised way. Keep your proposal focused and simple. Do your research into them beforehand. (8 mentions)
- They support organisational development. They provided space for an open and honest conversation about our plans and organisation as a whole. They engage deeply and show genuine interest in helping your organisation grow. They can help organisations demonstrate impact and then access larger grants. (7 mentions)
- They go beyond the usual funding relationship. Be prepared to engage. They proactively convene the sector and are not a silent partner. They provide advice, support, guidance and introductions as well as funds. (6 mentions)
- The application process is simple. They are flexible. (4 mentions)
- They are thoughtful and strategic, considering the whole ecosystem. (2 mentions)

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

54 (87%) respondents answered this question. The most frequent areas they mentioned were, in their own words:

- Adds value to grantees beyond funding by providing advice and support, taking a genuine interest. Tries to help you achieve goals, based on a strong understanding of the field and how NGOs work in the real world. Strong engagement with the issues. (15 mentions)
- Builds good relationships with grantees, based on good communication. Friendly. Speedy responses. Respectful, but curious and diligent. (13 mentions)
- Straightforward application and reporting processes. Discusses enquiries before you invest time in writing applications. Clear about their subject niche and funding amounts. Reporting is not too onerous. Gives constructive and helpful feedback. (8 mentions)
- Challenges you to think about real impact and outcomes, as well as the strategic direction of the organisation and the broader movement. (6 mentions)
- Convenes organisations, building a community among grantees. Encourages collaboration among grantees and strategic reflection. (6 mentions)
- Willing to take risks and fund work that is otherwise hard to fund. Can help scale up initiatives. (5 mentions)
- Introduces you to other donors and contacts. (4 mentions)
- Funding is flexible, including for core costs and fundraising. (3 mentions)
- Transparent and open to continuous improvement (e.g. 360giving, website, feedback survey). (1 mention)

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

39 (63%) respondents answered this question. 10 said “keep doing what you are doing”, which is many more than for any other piece of advice. Four expressed general appreciation. The others offered the following advice, in their own words:

- Offer grants for longer time periods, possibly with a diminishing amount each year. (3 mentions)
- Influence other funders to have a similar strategic and empathetic approach. We need more like you out there and need to hear your voice in the funder space. (3 mentions)
- Think carefully about the balance between providing input and allowing grantees to take their own path. Sometimes grantees need frank exchanges without a donor in the room. (3 mentions)
- Make more connections with unusual suspects. We need to form coalitions across the spectrum to get things done. Be broad and inclusive when consulting organisations about strategies. Work even harder to help grantees made new contacts. (3 mentions)

- Relatively narrow remit. Consider non-UK grantees. Be wary of only funding left-wing campaigns. Fund work in Joel's home town of Swindon. (3 mentions)
- Make your board more diverse. (2 mentions)
- Be clearer on your website about what you fund. Communicate more externally that you are available. (2 mentions)
- Make the application process easier. Ensure flexibility. (2 mentions)
- Grow your funding pot. (1 mention)

Two respondents raised concerns about how we handled our relationship with them, including:

- *More constructive feedback and an understanding of the constraints we were working under could really have helped. I feel they expect a 'big NGO' level of feedback and efficiency. This was for sure the most challenging funder relationship in recent years.*
- *The relationship could have been more nuanced towards the end of the grant. There were few suggestions from the funder as to how we might renew the relationship.*

3.4 Other findings

- 49 (88%) of respondents rated the extent to which we are achieving our goals as "good", on a three point scale. 7 (13%) rated it as "average". None rated it as "bad". Comments included:
 - *Stated goals fill a vital gap. Staff are experienced and implement the mission with vision and clarity.*
 - *Done well to leverage their small(ish) spending to incubate and catalyse work. They've helped bring in other, bigger funders.*
 - *For me, JCT is exemplary for how funders should work towards their goals.*
 - *Surprised they dropped their focus on Anglophone Africa.*
 - *An extremely strategic funder, permanently reflecting on how it can occupy a catalytic plan through its philanthropy.*
 - *JCT punches about its weight in terms of convening work, and playing a crucial role on under-resourced by vital issues like tax justice and corruption.*
 - *In the tax justice/financial transparency sector there are very few effective and innovative initiatives for which Joffe Trust funding has not been foundational.*
- 54 (90%) of respondents rated our accessibility as "good", on a three point scale. 6 (10%) rated it as "average". None rated it as "bad". Comments included:
 - *Easy to get hold of and talk to*
 - *Makes constructive suggestions*
 - *Personable and empathetic with grantees*
- On average, respondents said it took them 18 hours to complete our application process (2019: 10 hrs).

4. Comment

We received feedback from a wider group of respondents this year, compared to last year. The overall number of responses increased by about 50%. And the range of relationships with the Joffe Trust was also broader.

Three quarters of responses continued to come from current or former grantees. Of the rest, significantly more came from collaborators rather than applicants. This is reflected in a modest difference in tone, with more feedback commenting on the wider role we play in civil society.

Overall, the feedback continues to be extremely positive, consistent with previous years. Most respondents expressed a great deal of appreciation for how we work and what we do. They want us to keep doing the same.

Respondents particularly identified the way in which we are accessible and build up respectful relationships with grantees, based on a real knowledge of the issues. They appreciated that our processes are straightforward.

Respondents also widely appreciated our “funder+” approach, of providing advice, support and contacts as well as grants. They felt that we take a genuine interest in their organisations’ work and success, helping them to achieve more. They appreciated our convening work in support of collective strategising. And they continued to appreciate our flexible funding for core costs and organisational development.

This general feedback could be summed up in two key quotes: *“pushes us to perform without being on our backs”* and *“a strategic and empathetic funder”*.

A few respondents had different perspectives. Three warned us to think carefully about getting the balance right between providing advice and intervening too much. Two respondents felt that we could have handled the relationship with them better. Three commented that our remit has narrowed.

Naturally, each comment reflects specific experiences. We have not got every interaction perfect with every grantee. Occasionally, we send grantees critical comments. We should continually aim to improve and pay close attention to getting these judgements right.

A few respondents specifically asked us to influence other donors to take a similar approach. This appears to include our approach of supporting organisational development, our work on convening and our focus on tax and corruption. This is an area we could consider bringing more to the foreground in our next annual plan.

Respondents also identified a few other specific issues we should consider to improve our work, including: help grantees make new contacts, make more connections with unusual suspects, make our board more diverse, and communicate our work more actively.

5. Other quotes

- *“Our experience with the Joffe Trust has been wonderful. The team have been helpful and have shown genuine interest in helping us grow. Understanding we are a small charity with growth potential, giving brilliant feedback. Overall, most approachable, impactful donor we have engaged with.”*
- *“At the end of the grant, we got the most detailed and thoughtful response to our final report from them – quite unique in our experience, and so welcome.”*
- *“They are actually willing to fund core costs and invest in building fundraising capacity of their grantees. Why isn't every funder doing this? It would save so many good causes from going under. Well done Joffe Trust!”*
- *“Strategic philanthropy at its best. Listens and adds value to grantees in the pursuit of their mission.”*