

# Joffe Charitable Trust: Annual Feedback Report 2022

## November 2022

### 1. Introduction

From 17<sup>th</sup> – 31<sup>st</sup> October 2022 we asked the 516 people on the Joffe Charitable Trust’s mailing list to give us anonymous feedback about their experience of working with us. The mailing list includes a mix of grantees, collaborators, current applicants, unsuccessful applicants and anyone who has signed up via our website.

We emailed the list twice through MailChimp asking them to complete a Google form provided by GrantAdvisor. The questions are the standard ones used by GrantAdvisor, allowing comparison year to year and with other funders. The GrantAdvisor website is currently being updated, so the reviews are not yet public, but data will be used to populate the Joffe Trust page on their new website in early 2023.

We last used GrantAdvisor in 2020 (whereas in 2021 we used data taken from grantee reports) and so where comparisons are made this is mostly with 2020 numbers.

### 2. Responses

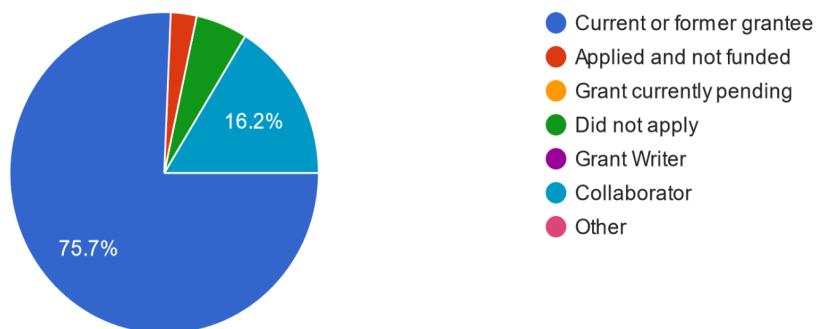
Despite a 50% open rate of the emails, we received only 37 responses (2020: 61, 2019: 41), which is a response rate of 7% (2020: 19%, 2019: 34%).

The fall in response rate could be due to the increase in the number of people we asked for feedback – the mailing list is now much wider than current and former grantees - and the fact that many current and former grantees will have provided feedback before.

Three quarters of respondents were current or former grantees:

What is your relationship with the funder for this experience? \*

37 responses



Only one respondent fell into the “applied but was not funded” category. 43% of respondents said they were commenting on their experience in 2022, 32% in 2021 and the remaining 25% stretching back as far as 2017.

### 3. Findings

The following analysis draws together some of the most common themes in the responses and examples of quotes, as well as highlighting a few outlying comments.

#### **3.1 Q: 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?**

37 (100%) respondents answered this question (it was compulsory).

This comment summaries the range of responses:

*“Joffe are approachable, friendly and open. They are interested in your strategic impact, and its alignment with their goals (but they are willing to be flexible). They are quite rigorous in their selection process, but also quite generous in the number of grants they give out (i.e., even if they have a lot of questions, persist!) Though the amount of funding they offer is relatively small, they are willing to use their connections to help you with your work and also to approach other funders. I would definitely recommend them as a funder.”*

Themes that came up include:

- Many respondents used words like approachable, supportive and helpful to describe the trust overall. (13 mentions)
- Respondents advised to the staff before making an application. The staff are approachable, expert, honest and sympathetic. They appreciate honesty about challenges. They will help connect you to others and give advice. (9 responses)

*“Be very open with them, and honest about your needs. They are very good at listening, are very understanding and want to help. As well as funding they provide excellent advice. “*

*“Be clear about your plans and goals - but also be open about any challenges/difficulties you're encountering; everyone at the Trust is understanding and they work hard to advise you on the best approach - so listen to them!”*

- Some advised that the trust asks rigorous and probing questions, that it is hard to 'get in' (4 responses). This was not framed negatively in most cases:

*“Joffe are a relatively activist funder and will ask probing questions about organisational governance and management. However, this is useful and staff are very willing to engage in supportive conversations about the best way to deliver project outcomes.”*

*“Be prepared to submit rigorous evidence of your theory of change and intended objectives as well as brushing up on the application process which, if successful, will involve a presentation. I would ask them to set aside quite a bit of time to rehearse this and prepare for questions. I would also stress that it's an exciting opportunity as the trust have an appetite for funding really exciting new organisations and projects and really invest in leaders - they are on your side!”*

- They are very focused, with limited resource aimed at specific strategic areas (6 responses)

*“Focused, specialist good expert team.”*

*“In recent years, Joffe Trust has moved towards a very specific campaigning agenda and only funds orgs or campaigns that are very aligned with its political goals - they tend to support quite a 'closed club'.”*

- Many comments gave general sound grant seeking advice such as being clear about your strategy, impact, added value and how work aligns with the criteria on our website (13 responses).
- Some mentioned our specific areas of work, e.g., illicit finance (5 responses) and focus on capacity building and supporting leaders (4 responses)
- They are flexible, responsive and non-bureaucratic (3 responses)
- They are collaborative and encourage collaboration (3 responses)

*“Joffe Trust is a thoughtful funder that wants to punch above its weight by complementing grantmaking with convening and influencing. The Trust works in a collaborative and wants to see a collaborative approach from others.”*

### **3.2 Q: Tell us one thing that JCT does really well.**

37 (100%) respondents answered this question (it was compulsory).

*“I loved the experience of a back and forth exchange and conversation throughout the application, and the understanding the core costs are essential and important!”*

The most frequent themes they mentioned were:

- Good communication throughout the application process and the relationship. Empathic advice, honest communication, supportive challenge. Listens well. (15 mentions)

*“Very open about the process, managed expectations and helped us understand the goals of the trust.”*

*“Gives the applying organisation full benefit of advice in an empathetic way.”*

*“I found the initial expression of interest call with Alex super helpful by way of guidance and preparation for submitting a full application. It made the whole experience a lot more human. It also was super helpful to have completely flexible funding.”*

- Promotes collaboration and strategic thinking. Engages with the issues in genuine partnership with grantees. Convening and field building. (10 mentions)
- Understands need for core costs, unrestricted and flexible funding (5 mentions)

*“Actually understands the need for unrestricted funding and investment in fundraising capacity. In fact I single the Joffe Trust out for praise in my forthcoming book for this reason!”*

- Simple, light touch processes and reporting (3 mentions)
- Clear about our own mission, strategy and objectives (5 mentions)
- Adds value through capacity building and advice (2 mentions)

*“Provides opportunities for their grantees to develop through training and knowledge development e.g. via the fundraising webinar that was held earlier this year.”*

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

37 (100%) respondents answered this question (it was compulsory).

The most frequent themes they mentioned were:

- 11 said variations on “keep doing what you are doing”. Some specified simple processes (2), bringing grantees together (1) and funding leadership (1). An additional 7 said they have no advice for us.

*“The funders are fantastic and every interaction with them is excellent. More opportunities like this would be appreciated.”*

- Educate other funders / share best practice / bring other (bigger) funders on board (4 mentions)

*“A long shot - but it would be great to develop a slightly more formal relationship with one or more larger donors to act as a 'feeder' system for the most successful/promising grantees to help scale up, once they have proved viability and impact”*

- Make larger grants (2) and focus on long term funding (3)

*“Long term funding is absolutely key to achieving the kind of system change that we are looking for.”*

- Be more open to different strategies and theories of change. Have more diverse grantees (3)

*“Find ways to diversify the pool of grantees you have. It would be good to see grantees who are on the margins and potentially from communities directly harmed by the problem areas you’re trying to solve.”*

- Appreciation for convening and capacity building event and appetite for more chances to network and connect with other grantees (5)
- Be cautious when it comes to the power dynamics of being a funder engaged in advocacy (2).

*“Joffe has been an excellent and catalytic funder because of the depth and focus of its engagement. Working with bigger funders is important to leverage that into greater change. The only point of caution is perhaps that there’s always a difficult balance for a funder between being engaged in the issues (important and good), and sometimes being in the room when a more open discussion might be possible if they weren’t.”*

*“Manage the fine line between own advocacy and supporting that of grantees.”*

There were two additional comments that could be interpreted in different ways (“bring people with you” and “by all means shake things up – but don’t over shake”).

- Be clearer about criteria for funding on the website, particular in focus area 2 (2)

*“You're doing a great job. If there's just one thing I would ask, it's that you're much clearer on your website about the causes you fund, perhaps by giving examples of causes you would turn down. This will make it much easier for me to know which of my clients I can refer to you.”*

### **3.4 Other findings**

Asked to rate our **accessibility** on scale of 1-3 (compulsory question), 78% chose 3 and 22% chose 2.

- Of 12 comments given, 8 people commented on the ease of getting in touch with the trust or that the trust is open/supportive/responsive: E.g. *“Alex is open to brainstorming with orgs even if they are not grantees. Very approachable and collaborative.”* *“It's really helpful to small organisations like ours to be able to put in speculative bids.”*
- One commented that the meaning of accessibility is unclear.
- One felt that our criteria were not clear and accessible: *“For me, accessibility isn't just about the ease of admin, it is also about having clarity about the funder's vision and goals - this is sometimes unclear or opaque.”*

Asked to rate our **how successfully we are achieving our goals as a funder** on scale of 1-3 (compulsory question), 73% chose 3 and 27% chose 2.

- Of 17 comments, 4 mentioned the Trust is making an important contribution to long term change, especially in focus area 1. *“Joffe funds key orgs in the transparency/financial equity/tax justice space which are critically important to keeping this work going.”*
- 1 mentioned the importance of our capacity building work.
- 3 comments mentioned the difficulty of achieving our long-term goals and that it's hard to measure or too early to say. A further one said, *“External issues too frequently block the best of intentions”.*
- 2 further comments had different views on our strategy and focus:

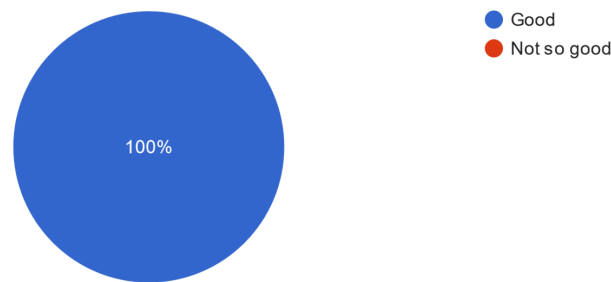
*“I wonder sometimes if the range of organisations and the relatively low maximum funding envelope limit effectiveness. I also think the goals they have are 'permanent goals' - i.e. even if we make major wins we will always have to protect them, and there is always the next frontier to push on, so I'm not convinced about spending down.”*

*“I think a recent narrowing of Joffe's focus makes sense - it has limited resources so shouldn't spread itself too thin. It has a clear focus and is making a significant contribution to its stated goals.”*

All respondents rated their relations with us as positive:

How was your relationship overall with the funder

37 responses



Asked is there if they had **anything else** to add, there were only 3 comments. One said, *“I think Joffe isn't that well known so perhaps doing more public outreach.”*

#### 4. Comment

The survey received fewer responses than previously, perhaps due to a kind of ‘feedback fatigue’. We could consider how frequently we should ask for this feedback in future years, and if there are other ways to promote GrantAdvisor (when their new website is up and running) to encourage feedback from people at the point of interaction with us (as not all will sign up to our email list).

Overall, the survey is consistent with earlier surveys and the kind of feedback we get in reports. The Trust is widely seen as approachable, supportive, flexible and engaged. Providing core and unrestricted funding and our ‘funder plus work’ is appreciated and there is a wish that more funders would take this approach.

Many comments related to issues already under discussion, and it is reassuring that there are no big surprises. Some comments relate to issues that are relatively easy to fix (for example illustrating criteria on the website more clearly) and some to issues that are harder to resolve.

There is a particular acknowledgement of the Trust’s work on Focus Area 1 (FA1) and the critical, unique contribution it makes here, albeit one that is hard to measure and goals that are ultimately hard to achieve. Some comments suggest that the Trust’s long-term support of the field is critical, making it important to bring other funders on board over the next few years. The Trust’s role as being very active in FA1 was mentioned as being very positive, but with some notes of caution around our role as a funder and the innate power imbalance that causes.

Several comments spoke positively of the Trust’s clear and narrow focus, but a few mentioned that Focus Area 2 (FA2) is not very clear, that more diversity in grant making could be beneficial and that FA1 is a bit of a ‘closed club’. Overall, the view of the Trust’s goal and strategy seems positive and fairly well understood among the respondents.

In response, there are some relatively ‘easy wins’ that we have already discussed and can action:

- Make the FA2 criteria on the website clearer, including providing some case studies of who we have funded and why.
- Continue to develop our 'funder plus' work and increase the number of capacity building and networking opportunities for grantees (particularly FA2) next year.
- Remove the trustee meeting applicant 'interview'.

Some open questions and longer-term considerations include:

- Should we give larger and longer grants to increase our impact (this relates to questions currently under discussion in the Grant Making Review)?
- How will we bring on board other funders for FA1 to ensure the long-term success of the field? And can we do more to bring on board bigger funders for our FA2 grantees?
- How do we ensure that we strike the right balance in FA1 between playing an active role in advocacy and as a funder?

There were some comments about being forced to give ratings for compulsory questions, where a 'don't know' option could be useful, and some ambiguity about the accessibility question. We will discuss these with GrantAdvisor.