



Summary of Applicant and Grantee Perceptions

UPDATED WITH COMMENTS

2012

All organizations that submitted Letters of Intent during the previous grant cycle (2012) were invited to provide feedback to the Foundation about their experience of the Letter of Intent process. Organizations that were invited to submit a Full Proposal to the Foundation were asked additional questions about their experience completing and submitting their proposals. In addition, both applicants and grantees provided valuable feedback about the impact of the Foundation's investments on their organizations, consumers/clients, the community and the field at large. Results are provided in a series of tables in the following pages. Comments by respondents are included following quantitative summaries.

Highlights

Key Findings

The REACH Healthcare Foundation implemented a new applicant and grantee feedback process for the 2012 competitive grant cycle. All organizations that submitted a Letter of Intent (LOI) to the Foundation (N=67) were invited to participate by completing a Foundation-developed web-based survey consisting of items measuring their experience responding to the LOI - and for those invited to submit a full proposal - developing and submitting their proposal. In addition, respondents were asked to provide information about the:

- utility of Foundation resources available to applicants;
- value of feedback received from Foundation staff;
- way applicants were treated and the helpfulness of staff during the application process;
- clarity and consistency of Foundation communications.

Respondents (n=42) were asked also to reflect on the value of the Foundation's investments in their organization, community and for consumers as well as to the field at large. Respondents provided feedback on the specific impact of REACH's grant-making and change-making efforts in advancing knowledge development and influencing health care policy in their respective fields.

The results presented here were obtained during a 15 day period in June, 2012, and indicate that the Foundation:

1. Is perceived to be fair, respectful and supportive of applicants and grantees;
2. Is perceived to be providing a thorough and thoughtful review of LOIs and Full Proposals;
3. Is perceived to be helpful and to have a clear and consistent application process;
4. Is providing useful resources and information for applicants as they prepare their LOI and full proposal; and
5. Is providing clear and consistent communications about our mission, goals and funding interest areas.

Respondents indicated that the Foundation is having a positive impact on professionals, their clients and consumers, their organizations, the community, and the fields REACH invests in. REACH staff are perceived to be knowledgeable, deeply engaged, and in some cases seen as leaders in their field – this is particularly true in health care advocacy and public policy. REACH is perceived by a majority of respondents to have had an influence on policy in mental health, oral health, integrated care, and supportive health services.

Respondents indicated that REACH funding has directly led to improvements in the quality of health care services and programs offered by grantees and has been essential in adding new programs and services, maintaining existing services, and supporting core operating expenses.

REACH staff and leaders are perceived to be responsive, respectful, helpful and fair with applicants and grantees. They are seen as knowledgeable about their respective fields, their organizations, engaged at helpful and appropriate levels with grantees, and interested in the work of grantees.

A number of areas for improvement were identified through the *2012 Applicant and Grantee Survey*:

1. Refinements to the online application to increase clarity and ease of use;
2. Narrowing the Full Proposal templates to reduce the proposal burden on applicants;
3. Providing additional information on the REACH Theory of Change to continue educating applicants and grantees of the value and utility of this tool;
4. Growing our presence and contribution in each of REACH's interest areas and deciding which of these areas we want to be perceived as a leader and innovator and which areas we are satisfied playing a deeply engaged or participating role but not necessarily at a leader level;
5. Continuing to inform the field of our efforts to influence and shape health care policy.

The following pages provide a series of tables summarizing the results of the survey and comparisons to internal benchmarks or thresholds of quality the Foundation uses to assess our performance. These thresholds attempt to answer the question, "how good is good enough?" and are meant as a way to identify areas of strength and areas for improvement for the Foundation. Thresholds will continue to be reviewed and adjusted so that Foundation staff continue to strive for higher levels of customer service and quality in our grant making.

For more information about the survey or the results please contact:



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Perceptions of Applicants Regarding Letter of Intent Process

<i>Do we treat others with respect and fairness?</i>	Yes	No	N	Met Threshold¹
REACH staff treated you with respect and supportive attitude during LOI process	100%	0%	37 ²	✓
Did you seek feedback from Foundation staff following LOI notification	88%	12%	42	n/a
After getting feedback believe your LOI received thoughtful and thorough review	91%	9%	35 ³	✓

<i>Are we, and our application processes, helpful?</i>	Very or Somewhat	Not Very or Not at All	N	Met Threshold¹
How helpful were REACH staff	92%	8%	39	✓
Online application process was clear	95%	5%	42	✓
Online application process was easy to use	95%	5%	39	✓

Comments:

“The grant guidelines and pre-proposal conference were particularly helpful. I referred to my notes from the conference several times while writing the LOI”.

“I thought that it was great how helpful the staff of the REACH Foundation were in answering any questions that we had”.

“The new process was challenging to get used to. In particular, it was a challenge to learn how to incorporate the new theory of change into the LOI. It's all the right thing to do, but a new process always is challenging to learn.”

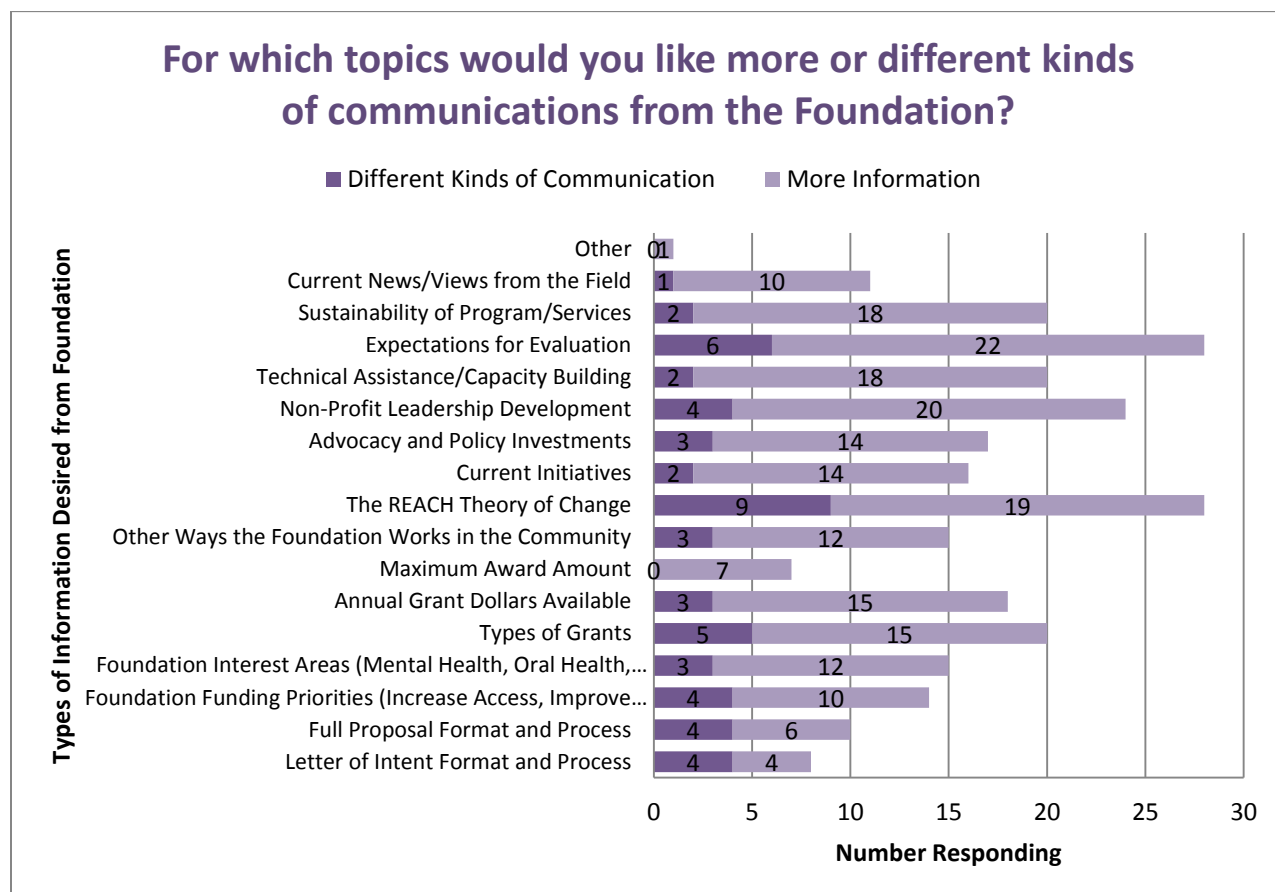
“The directions for the Theory of Change were unclear. Staff we were directed to were not very helpful. Much was unclear.”

¹ Threshold for these perceptions is 90% or more of respondents report positive, affirmative experiences and beliefs.

² 5 respondents reported that they had no contact with Foundation staff.

³ 7 respondents reported that they did not contact the Foundation for feedback on their Letter of Intent.

<i>Do we provide useful information for applicants to prepare their LOI?</i>	Did you use?	Very or Somewhat Useful	Not Very or Not at All Useful	N	Met Threshold (Utility)⁴
Grant Guidelines	100%	98%	2%	41	✓
Pre-Proposal Conference	98%	98%	2%	40	✓
Foundation Website	93%	95%	5%	38	✓
Letter of Intent Proposal Template	91%	97%	3%	37	✓
REACH Theory of Change	86%	90%	10%	35	✓
Phone Calls/Meetings with Staff	81%	91%	9%	35	✓
Foundation's Annual Report	48%	90%	10%	21	✓
Letter of Intent TA Workshop	33%	93%	7%	15	✓



⁴ Thresholds for the usefulness of information REACH provides is 90% reporting "very" or "somewhat" useful.

Comments:

"I thought that the REACH Theory of Change was a little difficult to understand at first."

"I would like to know more about what other REACH-funded agencies are doing so we can pool resources and work together on common issues. This is often communicated on the website and via the newsletter but I suspect there may be more opportunities."

Perceptions of Applicants Invited to Submit a Full Proposal

<i>Do we treat others with respect and fairness?</i>	Yes	No	N	Met Threshold⁵
REACH staff treated you with respect and supportive attitude during full proposal process	97%	3%	33 ⁶	✓
Did you seek feedback from Foundation staff following LOI notification	74%	26%	42	n/a
After getting feedback believe your full proposal received thoughtful and thorough review	94%	6%	32 ⁷	✓

Comments:

"The new Theory of Change make (sic) it impossible for projects like ours to get funded"

<i>Are we, and our application processes, helpful?</i>	Very or Somewhat	Not Very or Not at All	N	Met Threshold⁵
How helpful were REACH staff	94%	6%	32	✓
Online application process was clear	88%	12%	33	
Online application process was easy to use	81%	19%	32	

Comments:

"The new theory and outcomes part was very tricky."

⁵ Threshold for these perceptions is set at 90% or more of respondents reporting positive, affirmative experiences or beliefs.

⁶ 9 respondents skipped this question.

⁷ 2 respondents reported that they did not contact the Foundation for feedback on their Letter of Intent; 8 respondents skipped this question on the survey.

“The Theory of Change format excludes projects like ours. Even the staff agreed we are a good organization for REACH to fund but the data requirements are impossible for us to meet and there was no room for exception.”

“The challenge was answering all the questions thoroughly in the space allotted. I understand that a shorter application is easier and more efficient for the reviewers, but it was extremely hard to condense answers to eight pages of questions into ten pages of answers. It was particularly challenging to make the proposal read like a coherent story, rather than a list of answers to the questions. On the other hand, the brevity required in the final narrative helped me think much more carefully about word choices and how to be as concise and clear as possible. It probably made me a better writer. I think the challenge this year was primarily due to the major change in format from previous years. This was a learning year.”

“The Theory of Change was confusing and difficult to understand. I feel like it needs further refinement to ensure greatest usability.”

“Application language was confusing with some terms interchanged and used differently than many were accustomed to...spent a lot of time trying to fit proposal into REACH language requirements.”

<i>Do we provide useful information for applicants to prepare their full proposal?</i>	Did you use?	Very or Somewhat Useful	Not Very or Not at All Useful	N	Met Threshold (Utility)⁸
Grant Guidelines	100%	97%	3%	33	✓
Pre-Proposal Conference	100%	100%	0%	33	✓
Feedback from staff on LOI	97%	94%	6%	32	✓
Proposal Template	97%	84%	15%	32	
Phone Calls/Meetings with Staff	97%	91%	9%	32	✓
REACH Theory of Change	91%	77%	23%	30	
Foundation Website	79%	92%	8%	26	✓
Full Proposal TA Workshop	46%	100%	0%	15	✓
Foundation’s Annual Report	39%	100%	10%	13	✓

⁸ Threshold for usefulness of information provided is 90% reporting “very” or “somewhat” useful.

Perceptions of Foundation Communications

<i>Are we communicating with clarity and consistency about our work?</i>	Clarity⁹	Consistency⁹	N	Met Threshold⁹
Clear and consistent about our mission	100%	98%	42	✓
Clear and consistent about our goals	100%	95%	42	✓
Clear and consistent about our interest areas	100%	98%	42	✓

Comments:

“Theory of Change prescription excludes some projects within your service area.”

“The Foundation seems to slip in new priorities and pretend as if those have always been there. “Improving Quality” has become the buzzword in the last year or so, but I don't remember hearing it before then. REACH seems to be narrowing its priorities as well, funding ever-fewer worthwhile health efforts while claiming it can't do more because of its charter. There has never been an explanation about why, in the past, it could do many more things than it will do now while operating under the same charter. The Foundation has developed a reputation for being mercurial, temperamental, and bureaucratic.”

Perceptions of Foundation Knowledge of Field

<i>To what extent has the Foundation demonstrated an understanding of your field?</i>	Very or Somewhat Knowledgeable	Not Very or Limited Knowledge	Unable to Assess	N	Met Threshold (Impact)¹⁰
All REACH Interest Areas	93%	5%	2%	41	✓
Primary Care	87%	7%	7%	15	✓
Mental Health	88%	6%	6%	16	✓
Oral Health ¹¹	72%	14%	14%	7	
Integrated Care ¹¹	88%	---	12%	8	✓
Supportive Services	89%	5%	5%	19	✓
Advocacy/Policy	90%	10%	---	10	✓

⁹ Very or Somewhat Clear and Consistent; Threshold is 95% reporting “very” or “somewhat” clear or consistent.

¹⁰ Threshold is 85% or more reporting that the Foundation has demonstrated an understanding of field.

¹¹ Less than 10 respondents. Results should be treated with caution.

Perceptions of Foundation Contribution in REACH Interest Areas

<i>To what extent has the Foundation advanced knowledge in your field?</i>	Leader Offering Innovations	Deeply Engaged but not Innovator	Active Participant but not Leader	Limited or No Involvement	Unable to Assess	N
All REACH Interest Areas	47%	17%	15%	5%	17%	41
Primary Care	33%	27%	27%	7%	7%	15
Mental Health	44%	13%	19%	6%	19%	16
Oral Health ⁸	29%	29%	14%	14%	14%	7
Integrated Care ⁸	13%	50%	25%	13%	---	8
Supportive Services	32%	21%	21%	5%	21%	19
Advocacy/Policy	70%	10%	---	---	20%	10

Note: Thresholds have not yet been set on contribution indicators.

Perceptions of Foundation Influence on Public Policy in Interest Areas

<i>To what extent has the Foundation had a positive influence on local and state public policy in your field?</i>	Significant or Somewhat	Not Very or Not at All	Unable to Assess	N	Met Threshold (Impact) ¹²
All REACH Interest Areas	57%	14%	29%	41	
Primary Care	47%	20%	33%	15	
Mental Health	57%	19%	25%	16	
Oral Health ¹³	57%	29%	14%	7	
Integrated Care ¹³	75%	25%	---	8	✓
Supportive Services	53%	15%	32%	19	
Health care Advocacy	80%	---	20%	10	✓

¹² Threshold for Policy Influence is 75% or more reporting that the Foundation has had a “significant” or “somewhat significant” influence in public policy in their field.

¹³ Less than 10 respondents. Results should be treated with caution.

Perceptions of Foundation Impact (Generalized)

<i>To what extent has the Foundation's work had an impact on your field, organization and professionals</i>	Strong Positive/ Positive	No Impact	Strong Negative/ Negative	N	Met Threshold (Impact)¹⁴
Impact on the field	95%	0%	5%	41	✓
Impact on my organization	88%	7%	5%	41	✓
Impact on me as a professional	85%	10%	5%	41	✓
Impact on community	93%	5%	2%	41	✓
Impact on consumers/clients	88%	7%	5%	41	✓

Comments:

"The Foundation's commitment to excellence and growth is evident in the number of changes implemented over the last few years. REACH is an example to the nonprofit and advocacy community of continuous improvement and is also supportive of nonprofits making the same commitment in their own work."

"REACH has been a core funder of our organization for many years, and without REACH, our organization would not be able to have the impact it now has."

"I think REACH has a more rigorous and thoughtful grantmaking process than other foundations in our state. This has challenged me to become a better writer and to thinking in more detail about how to be certain our work matches the goals of REACH. "

"I've had the chance to work with nearly all the REACH staff over the past few years, and I have found each to be singularly dedicated to the mission of the foundation. Each sees how his or her work affects the funding priorities and the grantees. They all seek new and creative ways of improving the field to an extent that is almost unprecedented in our state. I have such respect for the work and diligence of the foundation and its staff."

"The foundation has financially supported the organizations services and program."

"I am biased by my experience with a wonderful program manager (redacted), but I feel that my experience with REACH has been worth more than anything I learned in a grant-writing course in my doc program. [Redacted] has nurtured our program, helped us think through priorities, helped us think about how to grow responsibly, and five years after our first grant, she is still helping us to plan for true sustainability. REACH has provided invaluable assistance for our program--the kids and families we serve--and has provided our organization with first rate grant technical assistance."

"Much more hands-on than other local foundations. We are a stronger, more competitive organization because of REACH's input and shaping. Also, the REACH Foundation's priorities affect other areas of my work, as they allow me to see what is cutting edge in the healthcare/mental healthcare field."

¹⁴ Threshold for Impact is 85% or more reporting "Strong Positive" or "Positive" impact.

“The Foundation is a consistent and major source of funding for my agency and the field. It also provides educational and capacity building (sic) support to agencies, which improves our service delivery.”

I seem to hear more about the impact HCF has on the Kansas City community more so than I do the Reach Fdn. Maybe it is because my organization is located on the MO side?

“Your funding inconsistency is destabilizing (sic) to our community.”

“As a professional, encounters with a variety of other public service oriented agencies are beneficial.”

“Funds received enabled a vital program to remain viable, impacting the communities served in a positive way.”

“We have yet to receive program funding yet others do over and over and they seem to be offering the same or similar services and no discussion with program officers has really helped to clarify what we could do better.”

“The foundation has (sic) providing financial assistance to help develop an oral health program that would not exist today if it were not for them. The organization I work for is using the model of this program to create oral health programs in other settings. Personally I have learned a lot through the process. REACH has truly made a difference in the lives of the children touched by the program as well.”

“The Foundation's impact has allowed agencies to do things that would not have been available to them without REACH's support.”

“[Redacted] cannot thank the REACH Foundation enough for the support that they have given to our clinic throughout the year. We are so lucky to have such a supportive and valuable foundation in our community.”

“REACH is critical to safety net mental health services in Western Missouri. Your resources have provided services for individuals who would not have otherwise accessed our agency. Your TA and support has advanced my knowledge as a professional. Your staff's professional, helpful manner of interacting has made working with you an enjoyable experience. This really is critical because there are funders in the area who are punitive and condescending, which is extremely unpleasant to say the least.”

“The Foundation is so narrow in its focus that it is having almost no success in "moving the needle." A return to the early years of funding a broader array of approaches would bring more success in many of the communities REACH serves.”

“Our oral hygiene project engaged thousands of youth in not only learning how to take care of their teeth/mouth but that it was OK to go to the dentist.”

Perceptions of Grantees: Impact of Past REACH Grants

<i>To what extent has the Foundation's investment(s) in your organization impacted . . .</i>	Strong Positive/ Positive	No Impact	Strong Negative/ Negative	N	Met Threshold (Impact)¹⁵
<i>your ability to continue pursuing your mission and goals and provide your services?</i>	97%	0%	3%	36	✓

¹⁵ Threshold for Impact is 85% or more reporting “Strong Positive” or “Positive” impact.

What specific effects have REACH investments had on your organization? REACH funding allowed us to . . .	%	N
Improve the quality of our services and programs	76%	29
Cover operating expenses so that we could pursue other funding opportunities	55%	21
Expand an existing program or set of services to more or different clients	53%	20
Maintain an existing program or service	50%	19
Add a new program or service to meet a new or existing community need	50%	19
Enhance our leadership capacity	37%	14
Survive as an organization during difficult economic times	32%	12
Leverage additional funding from other funders	29%	11

Note: Thresholds have not yet been set for specific effects of investments.

Please share any interesting or compelling stories of how REACH Foundation investments and/or work have positively impacted your community and/or clients/consumers:

“But for the support of the REACH Foundation, some of our programs would not have been as strong as they are. I think it was compelling that I saw nearly all the REACH staff volunteering at the Kansas Mission of Mercy this year. Some staff volunteered in some of the most challenging and emotionally draining areas of the event. All who volunteered remarked about how the event makes the oral health needs in our state abundantly clear. Seeing so many REACH staff so engaged with consumers and practitioners showed me that the foundation truly believes in its mission and will do whatever it takes to further the mission and goals.”

“As part of a revamping of our public policy advocacy program thanks to support from the Foundation's Advocacy TA grant, we had consumers brief staff and legislators on their concerns. We learned the following from some of our homeless youth: they are denied SNAP assistance if they receive Pell grants and if a parent/guardian claims them as a dependent in receiving SNAP assistance, the burden is on the youth to prove that they are not a member of the household.”

“Because of REACH funds, we have destigmatized the notion of mental health services for underserved Latino youth in inner city, KCK. We have kids from our school-based clinic come back years after they saw our practicum students or Promotora to tell us how much better things are since they went into counseling, got help for various problems, saw our family therapist, went to a CBITS group for their trauma, or went to a psychosocial group. The schools love having our program there, and we would not be able to be there if not for REACH monies. Also, we are training a cadre of social workers in truly culturally competent school-based mental health promotion/social work.”

“My consumers are afforded increased access and quality of care due to the funding from REACH. in an area of increasing poverty and numbers of people without health insurance or inadequate insurance, this investment is providing at least a basic preventive service that is desperately needed. The Foundation support has provided new and innovative programs for consumers in the community. It has increased the number of persons served.”

“Thanks to the REACH Foundation we will now have a state of the art electronic medical record and digital x-ray system in our dental clinic. [Redacted] patients, providers and staff will be able to expand services for our patients by increasing service volume and reducing wait time.”

“There is not enough space for me to communicate the impact. REACH has advanced our technology which has allowed our staff to provide services in the community more effectively and efficiently (e.g., because of laptops for our staff, clients can receive services in the community). CORE [operating] support has provided critical administrative funds that have allowed us to improve quality through streamlined internal processes and procedures. Most funders don't support admin costs. Program support has provided resources so that we can admit clients who don't have a payer. Your TA/expert consultation has allowed us to advance our mission and prioritize activities in a cost effective manner. Bringing groups together has allowed us to leverage/pool our resources. Coordinating your activities with other funders has made complying with your requirements easier because you have aligned your activities (it is difficult when funders have dramatically different missions, reporting requirements, proposal needs, etc.).”

Perceptions of Grantees: Foundation Characteristics

<i>Consider the following characteristics. Rate each in terms of your personal experience with the Foundation</i>	Very or Somewhat True	Not Very or Not at All True	Unable to Assess	N	Met Threshold ¹⁶
Foundation staff are responsive	97%	---	---	37	✓
Foundation staff are respectful	98%	---	---	38	✓
Foundation staff are helpful during the application process	97%	---	3%	38	✓
Foundation staff are helpful during the grant term	97%	3%	---	38	✓
Foundation staff treat me fairly during the application process	90%	5%	5%	38	✓
Foundation staff are overly involved during the development of full proposal	22%	64%	14%	35	
Foundation's approach is overly prescriptive through TOC, RFP, Guidelines	59%	41%	---	37	
Foundation staff are interested in our work during site visits	79%	5%	16%	38	
Foundation staff understand my organization's mission/goals	90%	10%	---	38	✓
I'm comfortable discussing grant progress/problems with my program officer	90%	5%	5%	38	✓

¹⁶ Threshold is 90% or more of respondents reporting “very true” and/or “somewhat true.” Response scale midpoint not reported. Threshold for reverse scaled items that include “overly involved” and “overly prescriptive” is 90% or more reporting “not very” and “not at all.”

Perceptions of Grantees: Foundation Characteristics (continued)

<i>Consider the following characteristics. Rate each in terms of your personal experience with the Foundation</i>	Very or Somewhat True	Not Very or Not at All True	Unable to Assess	N	Met Threshold¹⁷
There is an appropriate level of communication from my program officer during the grant term	87%	5%	8%	38	
The frequency of communications between the Foundation and my organization during the grant term is appropriate	92%	---	8%	38	✓
The frequency of site visits during the grant term is appropriate	84%	---	16%	38	
I am satisfied with my organization's relationship with the Foundation	87%	13%	---	38	

Perceptions of Grantees: Reporting and Evaluation Requirements

<i>Are the reporting and evaluation requirements reasonable given the amount of funding you receive?</i>	Yes	No	Unsure	N	Met Threshold¹⁸
Reporting requirements	90%		10%	38	✓
Data collection and evaluation requirements	81%	8%	11%	38	
Theory of change helpful for considering outcomes and indicators you can track	45%	26%	29%	38	

Other General Comments:

"I value and appreciate the work of the REACH Foundation and its staff. REACH has been an important partner from its inception. My concern has been with the implementation of the theory of change. I question its value to

¹⁷ Threshold is 90% or more of respondents reporting "very true" and/or "somewhat true."

¹⁸ Threshold is 90% or more of respondents reporting "yes."

the Foundation and, most especially, to the applicants. It seems to be yet another hurdle to jump with no discernible value.”

“I have tried to demonstrate my immense respect for REACH in the comments I've given here. I continuously marvel at the dedication to excellence and to their grantees REACH shows.”

“I would be remiss if I didn't share one issue I mull over frequently. The amount of work it takes to develop a REACH proposal is significant. It can feel a bit disproportionate to the funding requested. But, I also see exactly why all the questions are asked and why each is important. I'm not sure I would actually change anything. It's critical that REACH be good stewards of their funding and that the same is expected of the grantees. I'm truly ambivalent about this issue, but I thought it was worth mentioning.”

“I appreciate the opportunity to provide this feedback. This survey is another indication of REACH's dedication to excellence and to continuous improvement.”

“The REACH foundation is vital to the area's medical and mental health providers. Staff is very helpful and also sets high standards that funded agencies must meet in our grant submissions and outcomes. We enjoy working with the foundation and feel there is a partnership, despite the competitive nature of grants.”

“Foundation staff are committed, respectful and innovative. We appreciate our relationship with them. They have had a tremendous impact on Missouri.”

“Population focused disease prevention, health promotion and protection is the core of our agency services. We often compete for funding with agencies who have more demonstrable primary care focused services. We appreciate the opportunity to receive funding that helps us to improve the health of our communities through prevention and promotion focused programs.”

“Thanks for all that you do!”