

WALTON FAMILY FOUNDATION

# COVID RELIEF FUND EVALUATION FINAL REPORT

*Prepared by Public Profit, April 2022*

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# ACKNOWLEDGEMENTS

## Walton Family Foundation

We would like to express our deepest gratitude to the numerous Walton Family Foundation COVID Relief Fund grantees and staff who contributed their valuable feedback, insights, and stories to this evaluation.

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This evaluation also benefitted from the active participation of many other members of the Walton Family Foundation, including Program Area and grants management staff.



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# EXECUTIVE SUMMARY

In March 2020, the Walton Family Foundation established an emergency grant fund to quickly deploy resources to grantees and communities in response to the significant and evolving effects of the COVID-19 pandemic. The \$35 million fund was designed to support organizations across all three of WFF's Program Areas (Education, Environment, and Home Region).

The Foundation's Strategy, Learning, and Evaluation Department (SLED) and Public Profit, an evaluation and strategy firm, conducted a retrospective evaluation to learn more about the experience of the emergency grantmaking process and the impact of the COVID Relief Fund grants on grantees and communities. This evaluation across the COVID Relief Fund portfolio sought to answer six Evaluation Questions.

Public Profit reviewed grant documents, interviewed Foundation staff who were closely involved in the COVID Relief Fund grantmaking, interviewed 16 grantees who received COVID Relief Fund grants across all three Program Areas, presented interim findings for staff reflection and response, and fielded a survey to COVID Relief Fund grantees about how the funds impacted their organization and their relationship with the Foundation.

## Key Takeaways

- The Foundation's COVID Relief Fund grants were timely and needed, getting to grantees before PPP was available and providing cash flow to help maintain smooth organizational functioning.
- The grants provided significant support to people and communities; the grants directly reached over 800,000 children and 35,000 households and provided nearly 170,000 meals and over 65,000 PPE products.
- The grants supported long-term groundwork in the form of staff retention and organizational infrastructure investments and reinforced the Foundation's partnerships with grantees.
- The COVID Relief Fund experience provides an excellent opportunity for learning about the tradeoffs required for such relief funding which can strengthen the Foundation's strategic response to future emergencies.

## Evaluation Question 1. Grantmaking Overview

### *How were COVID Relief Fund resources allocated?*

The COVID Relief Fund dispersed nearly \$35 million across grantees in all three Program Areas. The grants made under this Fund closely aligned with the original goals laid out in March 2020. Notably, several strategies were consistent across Program Areas, reflecting a mix of crisis response goals intertwined with strategic ones.

## Evaluation Question 2. Grant-Funded Accomplishments

*What impacts were expected? What impacts were achieved?*

The COVID Relief Fund grants reached many people and communities as intended, with the following impactful achievements:



Over **800,000 students/children** and **35,000 families/households** were directly reached



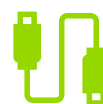
Over **1,500 news stories/social media posts**, nearly **75 research/journalism projects**, and over **150 trainings/webinars** were supported



Over **277 million visits or views** of content or media that was developed



Nearly **170,000 meals** and over **65,000 PPE products** were purchased and distributed

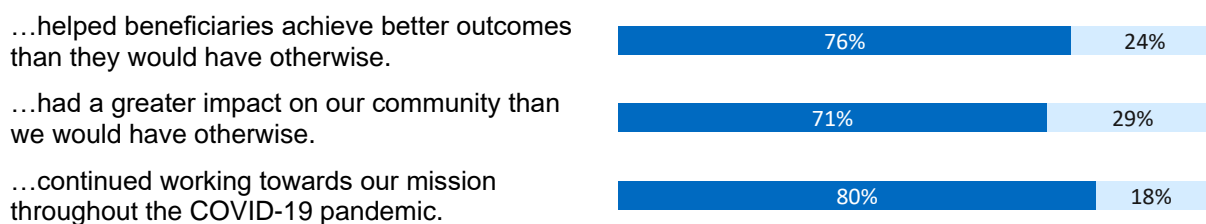


Over **25,000 technological devices** were purchased and distributed

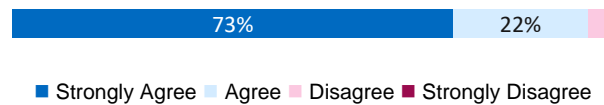
The COVID Relief Fund grants enabled grantees to continue to achieve their missions during the early months of the pandemic, often reinterpreting or reinventing their approach out of necessity (Figure 1). The grant dollars also created ripple effects, positively impacting future work.

Figure 1. The vast majority of organizations that received a COVID Relief Fund grant experienced positive outcomes related to the reach and impact of their work.

### Because we received WFF relief funds, our organization...



...reached more beneficiaries than we would have otherwise.



Source: COVID Relief Fund Grantee Survey. Administered December 2021, N = 98.

### Evaluation Question 3. Supporting Organization Financial Sustainability

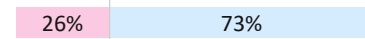
*To what extent and how did COVID Relief Fund grants support grantee organization financial sustainability? Did these grants have a meaningful impact on organization stability?*

The COVID Relief Fund supported financial sustainability for many of the organizations involved. Grantees were less concerned about cutting programming or laying off staff after receiving a COVID Relief Fund grant. After receiving the COVID Relief Fund grant, fewer were concerned about their future financial sustainability (57%) (Figure 2).

Figure 2. Grantees' concern for their organization's financial sustainability decreased after receiving the COVID Relief Fund grant.

#### My organization was concerned about our future financial sustainability.

Before receiving the COVID Relief Fund grant



After receiving the COVID Relief Fund grant



■ Disagree ■ Agree

Source: COVID Relief Fund Grantee Survey. Administered December 2021, N = 98. In this figure, "Agreed" refers to the proportion of "Strongly Agree" and "Agree" responses and "Disagree" refers to the proportion of "Disagree" and "Strongly Disagree" responses. Percentages may not add up to 100% because "Unsure" was an answer option that is not included in this figure.

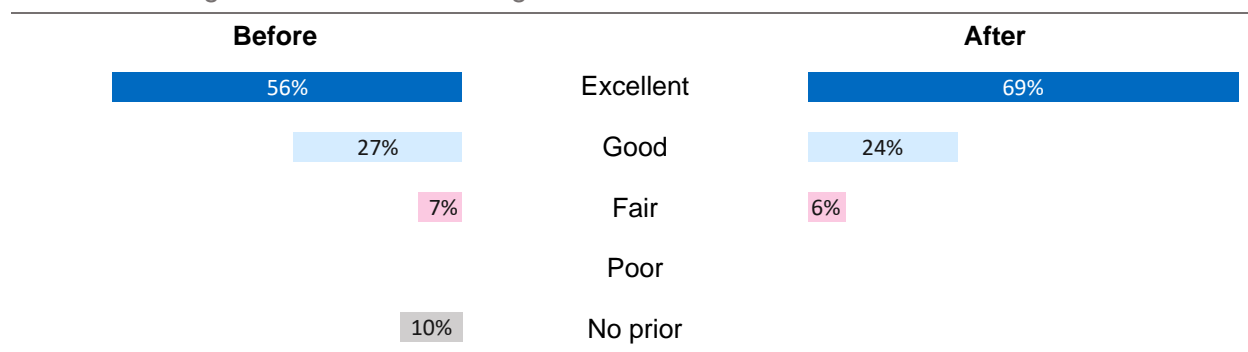
What stands out to the grantees is the timeliness and generosity of the dollars, which relieved worry and brought hope for the future.

### Evaluation Question 4. Trust and Relationship Building

*To what extent and how did COVID Relief Fund grants strengthen relationships between WFF and grantees? Between WFF and intended beneficiary populations?*

Most grantees felt that the COVID Relief Fund reinforced an already strong relationship with the Foundation (Figure 3). The Fund demonstrated the Foundation's commitment to its grantees, provided opportunities for grantees and the Foundation to work closely together, and gave grantees insight into the Foundation's priorities. Ultimately, nearly all grantees expressed gratitude for the COVID Relief Fund grants.

Figure 3. The majority of grantees reported that their relationship with WFF was excellent even before receiving a COVID Relief Fund grant.



Source: COVID Relief Fund Grantee Survey. Administered December 2021, N = 98.

### Evaluation Question 5. Strategic Adjustments at the Foundation

*To what degree did WFF's COVID grantmaking lead to strategic adjustments or new strategic pursuits? In what ways did these shifts help or introduce new challenges?*

The COVID Relief Fund occurred at a time of transition for the Foundation, as programs were in the midst of formulating new five-year strategic plans and sought to balance responsive relief funding with advancing strategic goals. Grants under the COVID Relief Fund were made through the programs, enabling crisis response to be intertwined with strategic goals to varying degrees.

Education implemented several strategies: some parts of this Program Area dispersed funds quickly while other parts waited so they could better understand the nature of the sector's needs. Home Region balanced protecting prior investments, such as in anchor arts organizations, with more direct relief, including supports for food distribution to families who previously relied on school-based meals and technical assistance and micro-grants to very small, family-run businesses. Environment chose to move more slowly than the other areas and funded existing grantees only.

WFF's COVID grantmaking presented many tradeoffs: Which organizations and communities benefit by fast grantmaking which largely goes to existing grantees? Should grants be made all at once, or should some funding be held back for a later stage of the pandemic? Which steps in the diligence process is WFF willing to sacrifice in its grantmaking approach to get dollars out the door quickly? And to what extent are these truly relief grants vs. strategic grants?

### Evaluation Question 6. COVID Response Grantmaking Practice

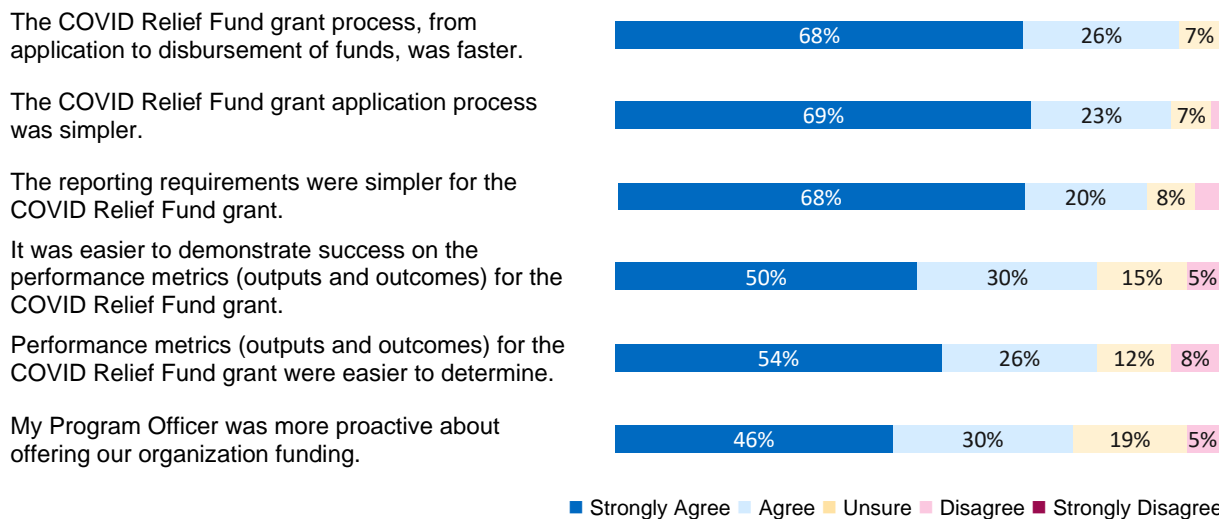
*What modifications did WFF make in its grantmaking approach? What worked well or less well? What can be carried forward in WFF's normal practice? If WFF had to do emergency grantmaking again, what would it do similarly or differently?*

The Foundation modified several aspects of its grantmaking approach for its COVID Relief Fund grants, including shortening the overall timeline, shifting the responsibility of completing the grant application

from grantees to Foundation staff, and getting dollars out the door quickly. Grantees appreciated the streamlined experience and the flexibility of reporting and other requirements.

Figure 4. The vast majority of grantees found the COVID Relief Fund grant process was easier and faster than traditional WFF grants.

**Compared to your previous experience with WFF grants:**



Source: COVID Relief Fund Grantee Survey. Administered December 2021. Only those who indicated that they had received a previous WFF grant were asked these questions, n = 74.

## Considerations

For future emergency grantmaking, the Foundation should build on its successes: prioritizing speed, streamlining the process for grantees, and building from existing relationships to get money to communities quickly and efficiently. The Foundation may also consider a staggered response, reserving some funds for later stages of the emergency. Finally, the Foundation should continue to reflect on its current partnership and continue to develop relationships with communities it hopes to serve, which can serve as the groundwork for future emergency response.



# ABOUT THE COVID RELIEF FUND EVALUATION

In March 2020, the Walton Family Foundation responded to the emergence of the COVID-19 pandemic by establishing an emergency grant fund to quickly deploy resources to grantees and communities in response to the significant and evolving effects of the pandemic. The initial funding request was up to \$35 million across all three Program Areas. Based on guidance from the WFF Board, COVID Relief Fund grants would receive the same rigor and diligence as all Foundation grantmaking, including a set of performance measures and a final report.

In partnership with the Foundation's Strategy, Learning, and Evaluation Department (SLED), Public Profit, an evaluation and strategy firm, conducted a retrospective evaluation to learn more about the experience of the emergency grantmaking process and the impact of the COVID Relief Fund grants on grantees and communities. This evaluation across the COVID Relief Fund sought to answer the following Evaluation Questions:

1. **Grantmaking overview:** How were COVID Relief Fund resources allocated?
2. **Grant-funded accomplishments:** What impacts were expected? What impacts were achieved?
3. **Supporting organization financial sustainability:** To what extent and how did COVID Relief Fund grants support grantee organization financial sustainability? Did these grants have a meaningful impact on organization stability?
4. **Trust and relationship building:** To what extent and how did COVID Relief Fund grants strengthen relationships between WFF and grantees? Between WFF and intended beneficiary populations?
5. **Strategic adjustments at the Foundation:** To what degree did WFF's COVID grantmaking lead to strategic adjustments or new strategic pursuits? In what ways did these shifts help or introduce new challenges?
6. **COVID response grantmaking practice:** What modifications did WFF make in its grantmaking approach? What worked well or less well? What can be carried forward in WFF's normal practice? If WFF had to do emergency grantmaking again, what would it do similarly or differently?

Data sources for these findings include:

- COVID Relief Fund strategy documents from March/April 2020
- Focus groups and interviews with Walton Family Foundation staff (conducted July/August 2021)
- Interviews with select grantees, including nine in Education, four in Home Region, and three in Environment (conducted August/September 2021)
- Grant documents including original performance measures and final reports (those available as of June 2021)
- Grantee survey (fielded December 2021)

The evaluation focused on the grants made from the COVID Relief Fund. In a few cases, grants made through regular grantmaking were closely tied to pandemic response, and these were included in the analysis to better understand the breadth of crisis response made by the Foundation at that time.

# EVALUATION FINDINGS

## Evaluation Question 1. Grantmaking Overview

*How were COVID Relief Fund resources allocated?*

**The COVID Relief Fund dispersed nearly \$35 million across grantees in all three Program Areas. The grants made under this Fund closely aligned with the original goals laid out in March 2020. Notably, several strategies were consistent across Program Areas, reflecting a mix of crisis response goals intertwined with strategic ones.**

In March 2020, the Walton Family Foundation responded to the emergence of the COVID-19 pandemic by establishing an emergency grant fund, the COVID Relief Fund, to quickly deploy resources to grantees and communities in response to the significant and evolving effects of the pandemic.

The initial funding request was up to \$35 million across all three Program Areas. Nearly all of the COVID Relief Fund dollars were spent, with the majority of funds allocated by May 2020 during the initial phase of the COVID-19 pandemic. In addition, programs spent some of their regular program dollars on work closely aligned to the pandemic response goals.

Each Program Area identified critical goals for their COVID Relief Fund dollars. Moreover, evidence collected for this evaluation strongly suggests that the original goals were either met or on their way to being so:

- The types of grants made within Program Areas aligned with the original goals.
- Most of those grants with completed performance measures met or exceeded their goals. Nearly all of those that had not met their goals were able to articulate mitigating circumstances they could not have been anticipated at the onset of the pandemic.
- Interviews with and survey responses from grantees strongly reinforced the information outlined in grant documents about the nature and purpose of the grants.

In short, available evidence all points in the same direction: the activities and outcomes of the COVID Relief Fund grants, across Program Areas, aligned achieve these original goals (Table 1).

Table 1. The COVID Relief Fund was dispersed in line with its original goals.

Program Area	Original Goals	Goals Met?
Environment	1. Protect WFF's previous investments in key projects and core grantees	Yes, Promising Evidence

Program Area	Original Goals	Goals Met?
Home Region	<ol style="list-style-type: none"> <li>1. Provide immediate support for urgent needs and community preparedness</li> <li>2. Protecting gains to date and smoothing transitions for grantees at risk</li> <li>3. Leveraging federal and state support</li> </ol>	Yes, Promising Evidence
Education	<ol style="list-style-type: none"> <li>1. Provide immediate support for educators, schools, and communities</li> <li>2. Supporting policymakers to make good education policy decisions</li> <li>3. Gather data and insights for long-term impact</li> </ol>	Yes, Promising Evidence

Source: WFF original Investment Memos, March 2020; Correspondence with SLED, June-November 2021; "Promising Evidence" includes a review of grant goals.

Several grant strategies were consistent across Program Areas, reflecting the nature of the grantmaking guidelines established when the Fund was created: crisis response goals intertwined with strategic ones. These strategies included:

- Providing technical assistance to acquire other aid (e.g., PPP loans).
- Providing immediate needs for communities (e.g., food, personal protective equipment (PPE), hygiene supplies).
- Supporting pivot programming: devices, equipment, professional development, and more to move programming online, socially distance, or enact other shifts to keep programming going.
- Protecting prior investments, including work continuity grants and support for anchor investments.
- Sharing ideas, including policy/advocacy, communications, disseminating best practices, information hubs.
- Regranting by various strategic intermediaries to reach beneficiaries quickly or those that are otherwise hard to reach directly.

*Were it not for this grant? We would have seen anywhere from three to six of our most important partners fold and the [work] would have stopped entirely. And had that happened, 20 years of conservation progress would have been erased. – Grantee Interview*

## Grantee Profile: Center on Reinventing Public Education

**Grant: COVID-19 Response | \$650,000**

**Program Area: Education**

- Shared learnings and developed best practices to support the field of K-12 education.
- Learnings will continue to impact the K-12 education field as it navigates the ongoing nature of the pandemic.

With WFF's grant, the University of Washington's<sup>1</sup> Center for Reinventing Public Education (CRPE) was able to provide thought leadership related to COVID response for the K-12 education field. They developed a research task force, called the Evidence Project, to coordinate, execute and disseminate research to support K-12 education policy makers, system leaders, and schools as they responded to the COVID-19 pandemic.

The needs of the K-12 education field evolved rapidly during the pandemic, as did opportunities for new research. The organization leaned on their strong relationships with leaders across the country, deep research capacity and expertise on educational systems change, and supportive partnership with WFF in order to be responsive.

*We needed to stay extremely nimble and alert to shifting priorities and dive into new issue areas quickly. – Grant report submitted to WFF*

As a result of this grant and the work, CRPE was able to help a range of stakeholders. CRPE helped funders strategize for high impact giving; supported school leaders to reopen safely with critical context about student learning, and assisted education policymakers - from local to federal government - to continue to improve the U.S. education system. Their research supports the field of K-12 education to understand what was happening leading up to the pandemic, what happened during it, and what changes must endure post-pandemic.

*We've never done anything with as much impact as we did with that [grant]. It continues to be the most impactful work I've done in my career, probably. I don't say that lightly. We stepped in and provided a service that allowed people to understand how to make sense of what was happening in the middle of a crisis, [especially] for kids. I think we'll be a critical set of information points and data for years as we look back on what happened. – Grantee Interview*

CRPE discovered that the pandemic made it even more difficult for researchers to connect and translate key findings to school district leaders and other important decision makers. As an organization, they are seeking ways to bring attention to this issue and incentivize researchers to address the gap between a robust evidence base and current practices out in the field in order to catalyze durable change in the education sector.

Sources: Grant Documents, August 2021; Grantee Interview, September 2021.

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<sup>1</sup> CRPE has since moved to Arizona State University.

## Grantee Profile: FaithActs for Education

**Grant: COVID-19 Relief Efforts | \$50,000**

**Program Area: Education**

- Provided immediate relief to pastors, clergy leaders, and their congregants.
- Strengthened constituent relationships.

FaithActs is a faith-based community organizing and civic engagement organization that advocates for improved educational opportunities for all children. At the onset of the pandemic, FaithActs surveyed over 1,400 of their network members, including pastors, clergy leaders, and congregants to understand the issues they were facing related to COVID and the shelter-in-place mandates. The survey revealed that the top three issues for members were food insecurity, access to distance learning, and job loss.

The WFF COVID Relief Fund grant supported FaithActs in providing immediate relief to address members' needs through purchasing and administering grocery store gift cards to members.

*The most important outcome for us was to respond to the need of our people. It was a moment in time where there was a crisis and we were in a position to show up and our only responsibility was to listen and to respond in a manner that our members needed. And I think for the scope of our coronavirus response work, like that was really it to me. – Grantee Interview*

Although FaithActs had not previously provided direct service and emergency response, they exceeded their goals: they raised a total of \$312,500 and provided gift cards to more than 1,100 families, and stipends/mini-grants to 58 member churches.

*It helped people in the moment, but I think it also brought hope. It brought positive energy to their lives. We actually had people give back to FaithActs with a small donation saying, “you gave it to me, I’m good now, you can pay it forward.” It was a very positive human moment in a very dark time. – Grantee Interview*

FaithActs' pandemic response also had a positive effect on their traditional civic engagement work (which was not funded by WFF): by the end of Summer 2020 they secured nearly 1,000 voter commitments despite not being able to implement their typical in-person canvassing activities. Additionally, positive response to their outreach increased in 2020 compared to previous years, demonstrating the value of building relationships and providing support to their network and beyond during a time of immense need.

Sources: Grant Documents, August 2021; Grantee Interview, September 2021; Grantee Survey, December 2021; Email correspondence, February 2022.

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## Evaluation Question 2. Grant-Funded Accomplishments

*What impacts were expected? What impacts were achieved?*

The COVID Relief Fund grants enabled grantees to continue to achieve their missions during the early months of the pandemic, often reinterpreting or reinventing their approach out of necessity. Among many other immediate impacts, the grants directly reached over 800,000 children and 35,000 households and provided nearly 170,000 meals and over 65,000 PPE products. The grant dollars also created ripple effects, positively impacting future work.

The COVID Relief Fund grants reached many people and communities as intended, with the following impactful achievements:



Over **800,000 students/children** and **35,000 families/households** were directly reached



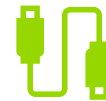
Over **1,500 news stories/social media posts**, nearly **75 research/journalism projects**, and over **150 trainings/webinars** were supported



Over **277 million visits or views** of content or media that was developed



Nearly **170,000 meals** and over **65,000 PPE products** were purchased and distributed

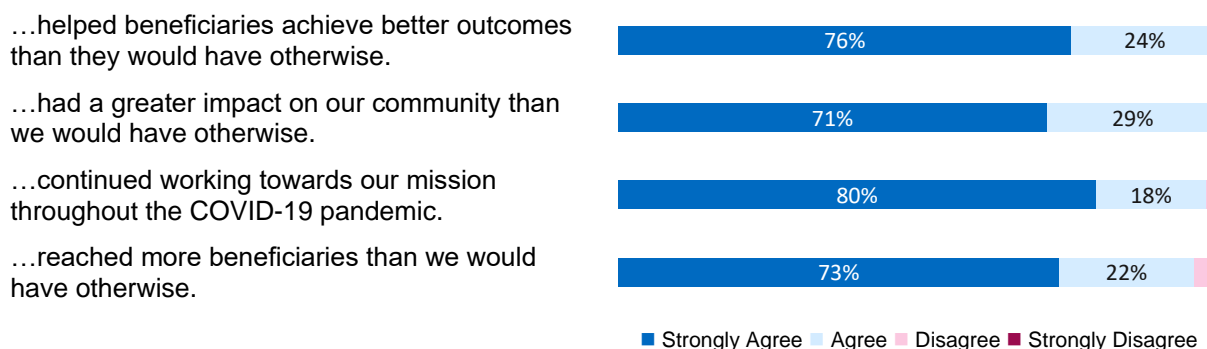


Over **25,000 technological devices** were purchased and distributed

Nearly all grantee survey respondents reported that they were able to continue work toward their mission (98%), in turn, helping their beneficiaries and communities through the pandemic (Figure 5).

Figure 5. The vast majority of organizations that received a COVID Relief Fund grant were able to directly support their beneficiaries and communities.

**Because we received WFF relief funds, our organization...**



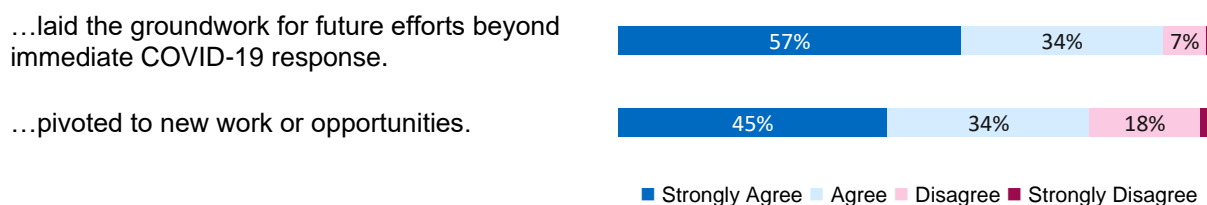
Source: COVID Relief Fund Grantee Survey. Administered December 2021, N = 98.

*Appendix A provides more enumeration of the impact of the grants, including more detail by Program Area.*

Many grantees were able to lay the groundwork for future work (91%) or even pivot to new work or opportunities (79%) (Figure 6). In some cases, the COVID Relief Fund dollars were invested in critical infrastructure that will outlast the grant period. This infrastructure included equipment for food storage, devices for students and teachers, and online content that will be relevant for years to come. In other cases, the grant dollars were used to collect, analyze, and share information during the first year of the pandemic that will be useful as the effects of the pandemic continue. For others, the COVID Relief Fund dollars enabled grantees to forge new and stronger partnerships that will sustain future work.

Figure 6. Many grantees were able to lay the groundwork for future work or pivot to new work or opportunities.

**Because we received WFF relief funds, our organization...**



Source: COVID Relief Fund Grantee Survey. Administered December 2021, N = 98.

## Grantee Profile: Pontchartrain Conservancy

**Grant: Bringing Field Work Digital | \$125,000**

**Program Area: Environment**

- Immediate pivots to virtual programming.
- Work continuity and safe return to work.

Pontchartrain Conservancy is a long-standing grantee under Environment's Mississippi River investments. The organization used the COVID Relief Fund grant to pivot and refresh existing programming to an online platform and to ensure safe return to field work, one of its core activities as a scientific research organization.

Pontchartrain Conservancy completed an organizational rebranding in June 2020, including a new website and media campaign. The rebranding helped get this 30-year organization off paper and into the digital world. They also were able to publish two peer-reviewed articles, which is something they had not had time to do in the past.

*Historically, our organization had spent most of our time collecting data in the field, which limited the amount of time we had to write and publish our research. This resulted in us using our time mostly to write internal grant reports, which are important to the scientific community, but aren't peer reviewed. With the new digital push, we paused field work while we wrote several reports and submitted them for peer review and publication. As a result, we had two peer reviewed reports published, which gives us a lot more visibility and credibility. – Grantee Interview*

In addition, Pontchartrain Conservancy developed and executed a coastal forest workshop which was held virtually given the government mandates at the time, but they saw high participation numbers over the course of four days. The organization was also able to develop a new Health and Safety Plan to guide return to field work.

At the time of the interview with this organization (September 2021), they were recovering from Hurricane Ida. This organization's experience illustrates the possibility that disaster relief may be an ongoing need for the Foundation as climate change compounds the lingering effects of the pandemic.

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Sources: Grant Documents, August 2021; Grantee Interview, September 2021; Email correspondence, March 2022.



## Grantee Profile: Community Foundation of Northwest Mississippi

**Grant: Addressing Basic Needs (Food Insecurity) | \$100,000**

**Program Area: Home Region**

- Addressed immediate needs in the Delta region of Mississippi.
- Leveraged other sources of support.
- Built long-term systems and infrastructure.

The Community Foundation of Northwest Mississippi launched its Feed Northwest Mississippi Fund at the beginning of the pandemic to feed 25,000 school children who no longer had access to school meals, including breakfast and lunch. The Walton Family Foundation joined the Maddox Foundation in providing significant funding that totals \$1.09 million in Feed Fund grants. The Community Foundation raised matching additional funds and then distributed the funds to nearly 100 grassroots nonprofits in the region with a focus on the Mississippi Delta. Most of these grassroots nonprofits were Black- and woman-led; most had no paid staff. The goal of the Feed Fund is to assist nonprofits in creating a state-of-the-art food distribution system.

The funds not only supported direct food distribution but also contributed to the strength of the food safety net for community members through both equipment and knowledge sharing. The funds allowed nonprofits to buy freezers to store perishable items and pallet jacks to make the work easier.

*Hell, a lot of people got food that wouldn't have gotten food otherwise. USDA was providing the food free of charge, but they were not providing transportation and volunteers. ... So, it was more than buying food. It was making sure the food actually got to people. – Grantee Interview*

The Community Foundation also coordinated sharing much needed information such as a video summit with a representative from the USDA to help the local nonprofits better understand how to navigate the USDA requirements.

*We had the head of the USDA Farmers to Family Food Box Programs speak. We had about 130 nonprofits on the video conference and she gave them inside information about the USDA and how to access food. – Grantee Interview*

Spurred by this momentum, the Community Foundation led the way in developing a long-term food relief system for the 11-county region that included the purchase of a \$1 million facility for a regional food bank serving 40 food pantries.

Sources: Grantee Interview, August 2021; Grant documentation provided by WFF; Grantee Survey Response, December 2021; Email correspondence, February 2022.

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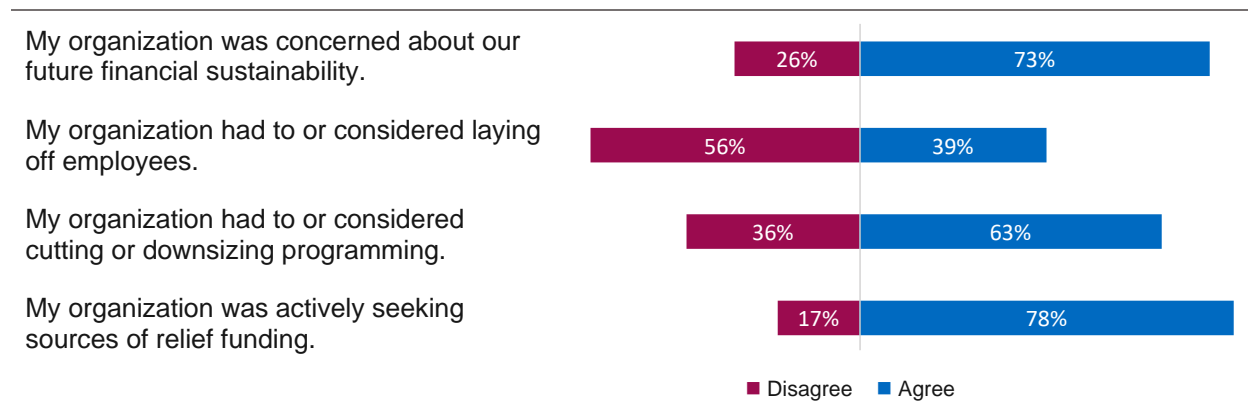
### Evaluation Question 3. Supporting Organization Financial Sustainability

*To what extent and how did COVID Relief Fund grants support grantee organization financial sustainability? Did these grants have a meaningful impact on organization stability?*

**The COVID Relief Fund supported financial sustainability for many of the COVID Relief Fund grantees. Grantees were less concerned about cutting programming or laying off staff after receiving a COVID Relief Fund grant. For several grantees, the COVID Relief Fund dollars bought them time as they waited for other relief dollars such as PPP loans. What stands out to the grantees is the timeliness and generosity of the dollars, which relieved worry and brought hope for the future.**

Not surprisingly, a majority of the grantee organizations surveyed were worried about their organizational outlook before receiving a COVID Relief Fund grant. Many were concerned about their future financial sustainability (73% of grantees) or were concerned that they would need to cut or downsize programming (63%). A sizeable number (39%) had laid off employees or were considering doing so. Most (78%) were actively seeking sources of relief funding (Figure 7).

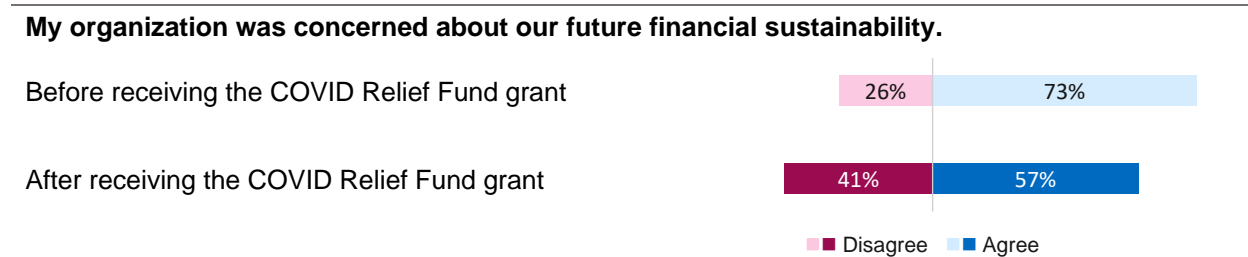
Figure 7. A majority of grantee organizations were worried about their organizational outlook BEFORE receiving a COVID Relief Fund grant.



Source: COVID Relief Fund Grantee Survey. Administered December 2021, N = 98. In this figure, “Agreed” refers to the proportion of “Strongly Agree” and “Agree” responses and “Disagree” refers to the proportion of “Disagree” and “Strongly Disagree” responses. Percentages may not add up to 100% because “Unsure” was an answer option that is not included in this figure.

After receiving the COVID Relief Fund grant, fewer grantees were concerned about their future financial sustainability (57%) (Figure 8).

Figure 8. Grantees’ concern for their organization’s financial sustainability decreased after receiving the COVID Relief Fund grant.



Source: COVID Relief Fund Grantee Survey. Administered December 2021, N = 98. In this figure, “Agreed” refers to the proportion of “Strongly Agree” and “Agree” responses and “Disagree” refers to the proportion of “Disagree” and “Strongly Disagree” responses. Percentages may not add up to 100% because “Unsure” was an answer option that is not included in this figure.

More importantly, of those grantees who had been worried about their financial future, most felt that their situation had improved (55%); none reported that it had worsened (Figure 9).

Figure 9. Of those who reported that “My organization was concerned about our future financial sustainability,” most felt the COVID Relief Fund grant improved their situation.<sup>2</sup>

Program Area	Improved	Stayed the Same	Worsened
Environment	63%	38%	
Home Region	60%	40%	
Education	53%	47%	
<b>Overall</b>	<b>55%</b>	<b>45%</b>	

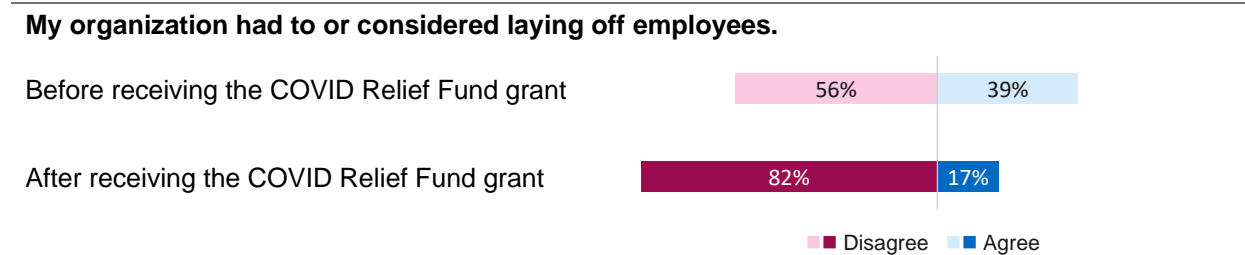
Source: COVID Relief Fund Grantee Survey. Administered December 2021. Respondents who indicated “Unsure” or who originally were not concerned (responded “Disagree” or “Strongly Disagree” to the pre-question) were dropped from this analysis, n = 69.

*It was a major factor in our financial sustainability and more importantly, it gave us confidence that we would find a way to weather the storm. – Grantee Survey*

<sup>2</sup> “Improved” in Figures 9, 11, 13, and 15 indicates the proportion of respondents whose answers to the pre- and post-question changed from the “Strongly Agree” side of the scale to the “Strongly Disagree” side of the scale. “Stayed the Same” or “More So” is the proportion of respondents whose answers to the pre- and post-question were the same. “Worsened” or “Less So” is the proportion of respondents whose answers to the pre- and post-question changed from “Agree” to “Strongly Agree”.

After receiving the COVID Relief Fund grant, far fewer grantees considered laying off employees (17%) (Figure 10).

Figure 10. Far fewer grantees had to or considered laying off employees after receiving the COVID Relief Fund grant.



Source: COVID Relief Fund Grantee Survey. Administered December 2021, N = 98. In this figure, “Agreed” refers to the proportion of “Strongly Agree” and “Agree” responses and “Disagree” refers to the proportion of “Disagree” and “Strongly Disagree” responses. Percentages may not add up to 100% because “Unsure” was an answer option that is not included in this figure.

Of those who had considered laying off employees or had already done so, most felt that their situation had improved (79%); this trend was particularly strong among Environment and Home Region grantees. Across the board, no grantees reported that their situation had worsened (Figure 11).

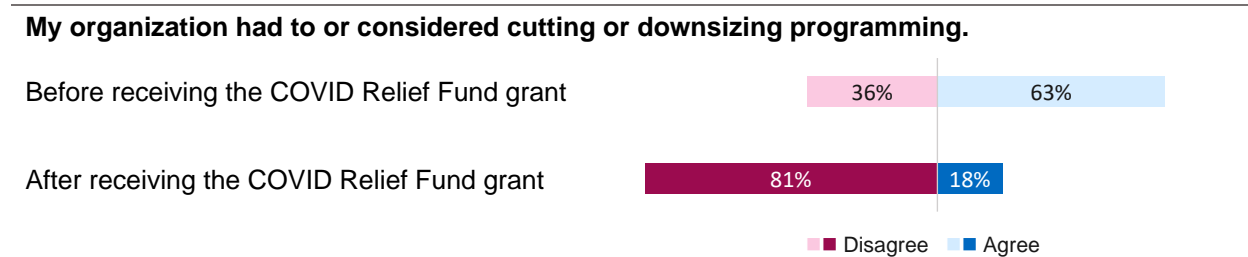
Figure 11. Of those who reported that “My organization had to or considered laying off employees,” most felt the COVID Relief Fund grant improved their situation.

Program Area	Improved	Stayed the Same	Worsened
Environment	100%		
Home Region	86%	14%	
Education	76%	24%	
<b>Overall</b>	<b>79%</b>	<b>21%</b>	

Source: COVID Relief Fund Grantee Survey. Administered December 2021. Respondents who indicated “Unsure” or who originally were not considering laying off employees (responded “Disagree” or “Strongly Disagree” to the pre-question) were dropped from this analysis, n = 39.

Similarly, far fewer grantees had to cut or downsize programming after receiving a COVID Relief Fund grant (18%) (Figure 12).

Figure 12. Far fewer grantees had to or considered cutting or downsizing programming after receiving the COVID Relief Fund grant.



Source: COVID Relief Fund Grantee Survey. Administered December 2021, N = 98. In this figure, “Agreed” refers to the proportion of “Strongly Agree” and “Agree” responses and “Disagree” refers to the proportion of “Disagree” and “Strongly Disagree” responses. Percentages may not add up to 100% because “Unsure” was an answer option that is not included in this figure.

Of those who had downsized, most (82%) reported that their situation had improved, particularly among Education and Home Region grantees. None reported that their situation had worsened (Figure 13).

Figure 13. Of those who reported that “My organization had to or considered cut or downsize programming,” most felt the COVID Relief Fund grant improved their situation.

Program Area	Improved	Stayed the Same	Worsened
Environment	60%	40%	
Home Region	82%	18%	
Education	85%	15%	
<b>Overall</b>	<b>82%</b>	<b>18%</b>	

Source: COVID Relief Fund Grantee Survey. Administered December 2021. Respondents who indicated “Unsure” or who originally were not considering cutting or downsizing programming (responded “Disagree” or “Strongly Disagree” to the pre-question) were dropped from this analysis, n = 62.

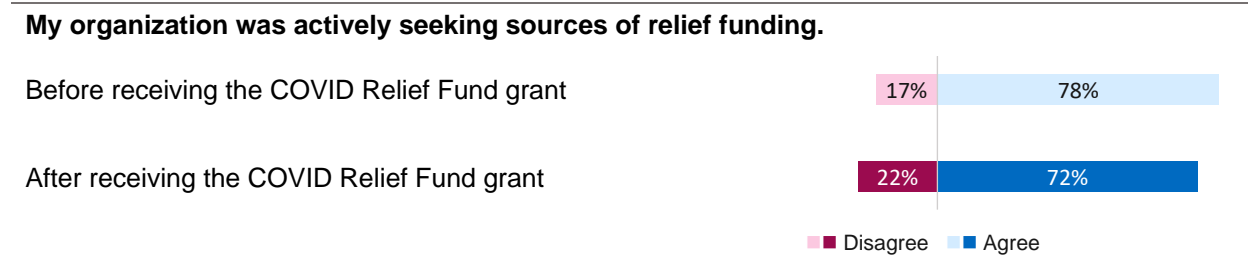
*It enabled us to continue our work without the interruption that might have come from uncertain funding and allowed us to invest directly in more than a half-dozen local news organizations that likely were facing their own financial challenges. – Grantee Survey*

Some grantees pointed out that the COVID Relief Fund enabled them to avoid spending other monies, such as their reserves or dollars earmarked for other programs and services. This suggests that the COVID Relief Fund grants enabled these organizations to avoid risky financial decisions that might have had long-term consequences.

*Instead of using core unrestricted funding, we were able to use grant funding, thus helping longtime financial sustainability. – Grantee Survey*

Before receiving COVID Relief Fund grants, most were actively seeking relief funding (78%) (Figure 14).

Figure 14. Slightly fewer grantees were actively seeking sources of relief funding after receiving the COVID Relief Fund grant.



Source: COVID Relief Fund Grantee Survey. Administered December 2021, N = 98. In this figure, “Agreed” refers to the proportion of “Strongly Agree” and “Agree” responses and “Disagree” refers to the proportion of “Disagree” and “Strongly Disagree” responses. Percentages may not add up to 100% because “Unsure” was an answer option that is not included in this figure.

Many (72%) were still seeking relief funding after receiving the grant, particularly among Environment grantees. The situation did improve for some; of those who had been seeking relief funding, several reported that their situation had improved (37%), particularly among Home Region grantees (Figure 15).

Figure 15. Of those who reported that “My organization was actively seeking sources of relief funding,” many felt the COVID Relief Fund grant improved their situation.

Program Area	More So	Stayed the Same	Less So
Environment	29%	71%	
Home Region	50%	50%	
Education	36%	61%	4%
<b>Overall</b>	<b>37%</b>	<b>60%</b>	<b>3%</b>

Source: COVID Relief Fund Grantee Survey. Administered December 2021. Respondents who indicated “Unsure” or who originally were not actively seeking sources of relief (responded “Disagree” or “Strongly Disagree” to the pre-question) were dropped from this analysis, n = 75.

For this finding, it is important to remember the timeline from the early months of the pandemic. The Walton Family Foundation’s response was swift and many of the COVID Relief Fund dollars were granted before the federal Payroll Protection Plan (PPP) loan program went into effect. Some grantees explicitly mentioned that they used the WFF COVID Relief Fund grant to tide them over until they could secure a PPP loan.

*The most impactful piece of the WFF grant was the timeliness of the funding. WFF was an early mover and this early support was critical in allowing us the time to maintain staffing levels and service provision while state and federal agencies readied their COVID-19 relief funding streams. – Grantee Survey*

For some grantees, the COVID Relief Fund did not directly contribute toward their financial sustainability. Some simply weren't concerned to begin with (26% were not concerned about their financial future, 36% were not cutting programming and 56% were not considering laying off employees (see Figure 7 on page 18).

*The bottom wasn't about to fall out for us. I wasn't about to lay off staff members or anything like that. It was more that our members needed us. I'm looking around for someone else to do this [work] and nobody is doing it, so we need to do it, but we can't do it unless I know that we're going to have some money in the bank to be able to pay for it. Because I can't sacrifice the long-term viability of the organization. That is what led us to the [grant] request. It wasn't like, 'Oh my God, I'm not going to be able to make payroll next week.'* – Grantee Interview

Many stated that the funds did not affect their organization's financial sustainability because they passed the money on, such as through regranting or by distributing to their beneficiaries.

*We were able to pass through 100% of the COVID Relief Fund dollars directly to [local education agencies] and nonprofits, many of whom were experiencing an increased set of needs while also facing future uncertainty about their own financial sustainability.* – Grantee Survey

The actual dollars helped organizations meet the demands of the pandemic, either for themselves or their constituents. But what stands out to the grantees is the timeliness and generosity of the dollars, which relieved worry and brought hope for the future. The COVID Relief Fund grants gave several organizations confidence that they could find their way in the pandemic, bought them necessary time to make the changes they needed and secure other funding, and enabled them to retain key staff, all of which were critical to their ability to bounce back from the shutdown.

*The WFF funding was either the first or second COVID-19 relief dollars that we received - this was a huge boost of hope to our organization and reduced a lot of anxiety and stress. While it didn't solve all of our financial problems, it provided the first ray of hope in a dark time.* – Grantee Survey

## Grantee Profile: Walton Arts Center

**Grant: Operations Continuity, Contingency Planning Support, and Online Programming | \$1,000,000**

**Program Area: Home Region**

- Allowed a key cultural institution time to develop contingency plans in the early days of the pandemic.
- Repurposed key staff to focus on long-term organization strengthening efforts, so the organization was better able to rebound from the pandemic shutdown.

The Walton Arts Center (WAC) is a \$30 million dollar organization whose main revenue source is ticket sales. WAC hosts productions at a 1,200-seat performance hall, two smaller black box theaters, and an outdoor amphitheater (the Walmart Amp). At the time of the initial shut down, WAC had just begun a production of Anastasia, which they had to halt abruptly. Having incurred the costs of production, WAC was faced with the prospect of refunding ticket sales. This immediate consequence, and the loss of revenue as WAC remained shuttered, threatened to escalate into a financial crisis.

The COVID Relief Fund grant brought the organization much needed time and space to regroup. The funds enabled the organization's staff to focus on developing a series of contingency plans, while simultaneously completing previously deferred maintenance projects on the facilities as well as engaging in professional development and updating professional certifications. Also, the grant allowed the WAC to develop online content and showcase local artists while national tours were halted.

*[WFF] understood that we needed time to sort out what would happen. They understood that answers were few and far between and that we needed time and that we needed support to maintain what we could do, keep our folks going. And they got it right away. – Grantee Interview*

As a result of retaining and repurposing staff, the organization saw efficiencies in ramping back up. Staff turnover was prevented, and veteran staff were on hand to guide ramp up efforts. This was of particular importance given the challenges of recruiting high-profile arts professionals from across the country to relocate to Northwest Arkansas. The ability to keep key staff meant that the organization was in a much better position to rebound from the early months of the pandemic and restore high quality in-person programming.

*We recruit people here for a lot of our specialty positions. And if we let those folks go, they are likely to leave the area. And it is very difficult to get people to come back to this area. At this point in their career, they were not going to necessarily get positions in this community. So, retaining people was absolutely paramount to me. – Grantee Interview*

Sources: WaltonArtsCenter.org; Grantee Interview September 2021; Grant documentation provided by WFF; Grantee Survey Response, December 2021.

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## Evaluation Question 4. Trust and Relationship Building

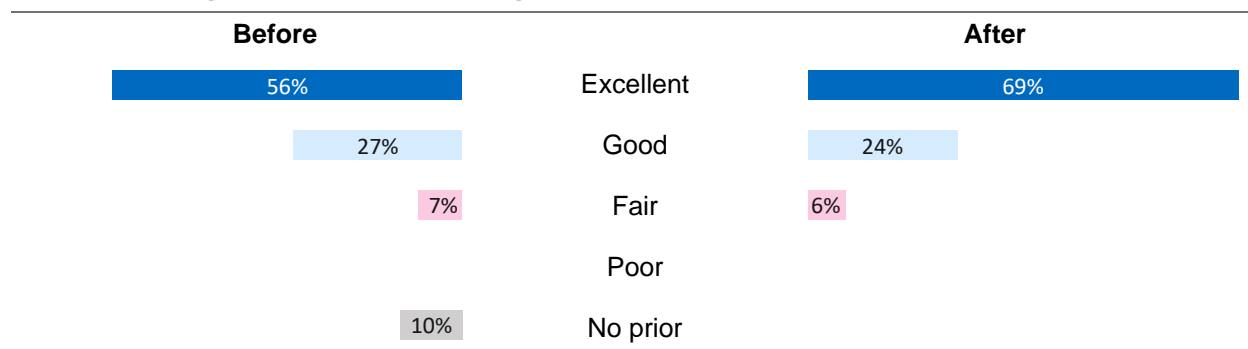
*To what extent and how did COVID Relief Fund grants strengthen relationships between WFF and grantees? Between WFF and intended beneficiary populations?*

**Most grantees felt that the COVID Relief Fund reinforced an already strong relationship with the Foundation. The COVID Relief Fund demonstrated the Foundation’s commitment to its grantees, provided opportunities for grantees and the Foundation to work closely together, did not dictate grantee agendas, and, according to grantees, gave grantees insight into the Foundation’s priorities.**

Many grantees felt that the COVID Relief Fund reinforced an already strong relationship with the Foundation. A majority (56%) felt their relationship was excellent before the COVID Relief Fund; even more felt it was excellent after the Fund (69%) (Figure 16).

*I could text my program person, call them, email them, and I never would have an issue getting a response from them. The relationship is excellent. – Grantee Interview*

Figure 16. The majority of grantees reported that their relationship with WFF was excellent even before receiving a COVID Relief Fund grant.



Source: COVID Relief Fund Grantee Survey. Administered December 2021, N = 98.

*We're such close partners and I think that that was reflected in how quickly [our Program Officer] was able to fix our problems. Because she's very invested and [I know that] the Foundation is very invested in the success of this program. So, I could say that it strengthened our relationship, but we already have an extremely good relationship, and it was really just like two very tight friends/business partners working through this and making it happen. – Grantee Interview*

Generally, the relationship between grantees and the Foundation remained stable. Most who rated the relationship as Excellent continued to rate it as such; most who rated it as Fair continued to do so. However, for about one in five grantees, the relationship improved after receiving their COVID Relief Fund grant, particularly in Environment and Home Region (Figure 17).

Figure 17. The majority of COVID Relief Fund grantees reported that their relationship with WFF stayed the same, as it was already strong.

Program Area	Improved	Stayed the Same	Worsened
Environment	25%	75%	
Home Region	21%	79%	
Education	14%	83%	3%
<b>Overall</b>	<b>16%</b>	<b>82%</b>	<b>2%</b>

Source: COVID Relief Fund Grantee Survey. Administered December 2021. Respondents who indicated “No prior relationship” were dropped from this analysis, n = 88. “Improved” is the proportion of respondents whose answers to the pre- and post-question changed from lower on the scale (“Poor” being the lowest) to higher on the scale (“Excellent” being the highest). “Stayed the Same” is the proportion of respondents whose answers to the pre- and post-question were the same. “Worsened” is the proportion of respondents whose answers to the pre- and post-question changed from higher on the scale to lower on the scale.

*I think [the COVID Relief Fund grant] strengthened an already strong relationship. I have thanked them profusely for the level of trust that they had in me and their encouragement. With any relationship, it is tested in a crisis, [thinking], ‘Can we really work together?’ Under extreme duress - everybody was stressed, everybody was tired, everybody was unsure about what to do - the fact that they honored us with their trust and funding means a lot. So, I think it strengthened [the relationship], but I don't think it changed it dramatically. – Grantee Interview*

Grantees characterized the strengthened relationship between themselves and the Foundation in a few ways.

**1 First, the Foundation demonstrated its commitment to its grantees through the speed and generosity of the grants themselves.** The Foundation provided intangible support during the early months of the pandemic, providing information about how to access other relief funds and through partnership about how to navigate the crisis. This demonstration of the Foundation’s commitment to its grantees increased trust among them.

*I know I can trust on [sic] WFF as a partner more than ever. You demonstrated that you care about me and my team in a way that I had not previously experienced. I felt supported in a deep and meaningful way that I will never forget and will always be grateful for. Showing up like that during the most challenging times does not get overlooked or forgotten. – Grantee Survey*

**2 Second, the COVID Relief Fund grants created new opportunities to work closely with the Foundation.** Several grantees noted that the COVID Relief Fund grants provided an opportunity for the Foundation and grantees to work together to craft a vision for the future in line with their mutual strategic goals.

*We were able to engage in deeper conversation on how we could work together to strengthen the small business ecosystem in the region. – Grantee Survey*

3

**Third, some grantees specifically mentioned that the Foundation did not dictate a grantee’s agenda.** This is notable given that strategic funders – in contrast to responsive funders – run the risk of imposing their strategy too strongly on nonprofit organizations. Grantees shared that this experience improved their relationship with the Foundation.

*As a journalism organization, one of the main things we appreciated about your WFF grant was that no one ever attempted to influence our reporting. That may sound like a simple and professional objective to achieve, but we can promise you that other entities sometimes try to tie their financial support to editorial influence. [We] have a more robust relationship with WFF now, but we also appreciate that we don't get phone calls every week trying to make us do something. – Grantee Survey*

While many grantees characterized their relationship with the Foundation as a strong and positive one, some grantees offered more critical perspective on their relationship with the Foundation, characterizing the relationship as one requiring a relatively high level of work on the grantee side. As one grantee said, “With Walton, it's a high maintenance relationship with a high level of reward; deliverables and reporting obligations are disproportionate compared to other funders.” Grantees also shared that the Foundation’s strategy is often opaque and that it can be hard to know which proposals the Foundation might support.

*I do find them to be among the less transparent foundations in the space. There's a bunch of contextual reasons why that is true, but it doesn't feel like it's a priority for them to be clear externally about where they're headed. It impedes an organization's ability to know where they stand with Walton. – Grantee Interview*

4

**This provides some context for the fourth reason, as cited by grantees, that the COVID Relief Fund grants strengthened the relationship: the COVID Relief Fund illuminated the Foundation’s priorities, offering a glimpse into the Foundation’s strategy that they hope to leverage in the future.**

*[The COVID Relief Fund grant] helped us to understand WFF priority areas, how WFF learns alongside grantees, and how our work supports the same desired outcomes. – Grantee Survey*

While this was a common theme among grantees, a consideration is that the COVID Relief Fund grants were out of the ordinary and should not be construed as revealing anything about the Foundation’s traditional grantmaking strategies.

Ultimately, nearly all grantees expressed gratitude for the COVID Relief Fund grants.

*We are grateful for the Foundation cutting through internal bureaucracy to make these grants happen at a time when there was so much uncertainty. Others talked a good game, WFF stepped up in action and we noticed. – Grantee Survey*

## Grantee Profile: Instruction Partners

**Grant: COVID-19 Response – Remote Learning | \$226,687**

**Program Area: Education**

- Supported schools, teachers, families, and students in the national pivot to remote learning during the pandemic through a program called “Grab and Go Materials” that continues to be relevant.
- Strengthened their organization’s knowledge infrastructure.

As a first time WFF grantee, Instruction Partners was funded to curate a coherent program for grades K-9 called “Grab and Go Materials” in response to the national pivot to remote learning as a result of the COVID-19 pandemic. Each week for eight weeks, Instruction Partners released a packet of instructional materials, including grade level-specific assignment bundles and instructions for parents and caregivers. To address equity concerns regarding technology and internet access, all of the materials were analog and thus did not require a computer.

To make Grab and Go Materials happen, Instruction Partners redirected staff time away from its traditional streams of work – working shoulder to shoulder with schools and systems to improve access to high-quality instruction – to fill a practical and time-sensitive implementation need. While Instruction Partners is not a curriculum developer, the funding allowed the organization to temporarily play a content creation role in support of schools that urgently needed resources and materials for remote learning.

Ultimately, Instruction Partners was successful in providing remote learning resources to their network and beyond. There were over 10,000 downloads of Grab and Go Materials by the middle of Summer 2020 and feedback from users – including school districts/local education agencies, teachers, and parents/caregivers – was positive. Instruction Partners and the materials they created were even highlighted in the press.

As a result of this work, Instruction Partners learned a lot about content design and how to organize design teams. They also gained insight into managing and implementing distance learning at the school- and system-level, which allowed them to better support school/system leaders in their preparations for return to in-person and hybrid learning models as the pandemic continued.

*I think for us organizationally, we learned a ton about how we stood up those design teams and how we manage them. It was a real design sprint. I think there were a lot of lessons that I remember us incorporating in our design processing and things like how we create the right norms for new cross-functional teams. We ended up having a reorganization last summer, and I think that the lessons from Grab and Go probably affected the way we did that. There was no part of us that was thinking about being a curriculum development organization before this. I think [this grant and process] certainly confirmed that there is a profound amount of use case testing that you [will] want to do. – Grantee Interview*

Sources: Grant Documents, August 2021; Grantee Interview, September 2021; Grantee Survey, December 2021; Email correspondence, February 2022.

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## Evaluation Question 5. Strategic Adjustments at the Foundation

*To what degree did WFF's COVID grantmaking lead to strategic adjustments or new strategic pursuits? In what ways did these shifts help or introduce new challenges?*

**The COVID Relief Fund occurred at a time of transition for the Foundation. Grants under the COVID Relief Fund were made through the programs, even as programs were in the midst of formulating new five-year strategic plans. The Foundation sought to balance responsive relief funding with advancing strategic goals.**

**Program Areas had a variety of strategies for disbursing their funds. Education implemented several strategies: some parts of this Program Area dispersed funds quickly while other parts waited so they could better understand the nature of the sector's needs. Home Region balanced protecting prior investments, such as in anchor arts organizations, with more direct relief, such as food distribution and micro-grants to small businesses. Environment chose to move more slowly than the other areas and funded existing grantees only.**

**Disbursement of the COVID Relief Fund presented the Foundation with a number of difficult decisions: Is fast grantmaking preferable to slower, more strategic funding? If so, which organizations and communities benefit from fast grantmaking and which are not reached? Should grants be made all at once or should some funding be held back for a later stage of the pandemic? Which steps in the diligence process is WFF willing to sacrifice to get dollars out the door quickly? And to what extent are these truly relief grants versus strategic grants?**

Programs combined crisis response with their strategy in diverse ways. In some cases, programs used the COVID Relief Fund dollars to shore up strategies that were otherwise being deprioritized in the next 5-year strategic plan. In this case, the COVID Relief Fund grants protected the good work supported under Strategy20 and earlier. For example, Environment funded longstanding partners in international fishery conservation to solidify years of investment in those regions while Home Region invested in regional arts organizations to help key cultural institutions survive until they could offer in-person events again.

On the other hand, some programs used the COVID Relief Fund to jumpstart Strategy25. For example, Education funded new school networks already identified under their new strategy. Home Region disbursed some of its funds in line with new inclusion goals, such as funding translation of COVID-19 information and support for the Marshallese community in Northwest Arkansas.

*We had a deadline and so we needed to frame our strategy quickly to set ourselves up for the future to [fund new, strategic opportunities through traditional grantmaking], and now we have some evidence base and a network to do that. – Program Staff Focus Group*

Some programs made grants available faster than others. Grants to arts organizations and educational networks often happened quickly. But within Environment and some parts of Education, grants were made more slowly, allowing more time to understand the landscape of grantee need. In a few instances, early, speedy grantmaking needed to be revised later. For example, Home Region originally funded organizations to provide loans for small businesses, but small businesses were hesitant to take on loans during such an uncertain time. Later grantmaking shifted, funding programs that provided micro-grants or incentives rather than loans that needed to be repaid.

*We sort of matched our COVID-19 money with programmatic money... As we started to see how the contours of the crisis was shaking out, and it was going to be much longer and slower, and not this sort of 2008 Wall Street crash kind of impact, we were able to blend both the investment and the purpose, if that makes sense. We leveraged the pandemic rapid response capability to make rapid response grants that had additional benefits. – Program Staff Focus Group*

In general, the Foundation prioritized getting funds out the door quickly. Rapid response is critical in moments of uncertainty and crisis, such as the start of the pandemic, and the speed with which the Foundation responded was praised by staff and grantees alike. In service of speed, the Foundation designed a streamlined process and often relied on existing relationships with grantees or intermediaries to reach communities quickly.

With speed came tradeoffs. Programs got money to grantees quickly but missed the opportunity to provide relief for needs that emerged a few months later. Some staff wished they had been slower and more strategic at the outset.

Many of the grants were intended to strengthen and sustain existing grantees in a moment of crisis. As one staff mentioned, the COVID Relief Fund afforded programs the opportunity to “take care of their own.” Programs also used intermediaries to disperse money quickly to priority communities. At the same time, by focusing on shoring up previous grantees and using intermediaries in order to move quickly, the Foundation had to forego a more inclusive process. Program Officers pointed out that programs are actively considering how to expand relationships in service of equity.

*Our grantmaking is by invitation, and so if you do not have a connection to the Foundation, then it's very challenging for you to land on our radar. What became evident in COVID-19, and very informative to Strategy 25, was the idea of access and what that means. And so, we are thinking about how our Strategy 25 can result in more equitable grantmaking. – Program Staff Focus Group*

In order to balance support for grantees and the Foundation’s due diligence practices, the Foundation shifted some of the burden of the grantmaking process onto its own staff. Grantees greatly appreciated this streamlined experience on their side, and staff were glad to do so in support of their grantees. Yet, this resulted in additional tradeoffs. First, Foundation staff employed a variety of internal tactics to get money out of the door quickly such as paying out grants before finalizing performance measures. These tactics left significant gaps in the grants management system, creating extra work to piece together the impact of the grants across Program Areas. This shift also increased the burden on staff, in addition to strategic planning and regular grantmaking, during a time when staff were themselves impacted by the crisis. Some staff expressed that they wished the Foundation had provided opportunities to delay or defer existing work.

*Acknowledging that additional capacity is needed, that either you need to ramp up your capacity very quickly, or you need to take something off the table. I don't feel like we really confronted that aspect of it and it was very hard. This was a moment where every individual was being impacted by what was going on. We could have done a better job of acknowledging what we were asking and what it was going to require and the toll it was going to take. – Program Staff Interview*

The use of the term “relief” itself led to some confusion, both among grantees and Foundation staff. Several staff expressed a desire for grants to be more in line with traditional notions of relief grants: faster, simpler, less restricted (such as general operating funds). That said, many of the findings in this report are possible because grantees were asked to report on performance measures. More broadly, by grounding relief funding in strategic goals, the Foundation supported a virtuous cycle: investing in the sustainability of those grantees that will continue to partner with the Foundation in service of its strategy.

Finally, the pandemic is not over. While the COVID Relief Fund dollars are spent, grantees continue to have COVID-related challenges as the pandemic – and communities’ responses – shifts over time. The Foundation should continue to take this into account in its ongoing grantmaking.

*This is still an unfolding crisis. And what success looks like is sometimes ambiguous and the ground is constantly shifting under our feet. So, I'm trying to figure out what to do next, trying to figure out what the next right thing to do is, and stay focused when we've got a lot coming at us about how we best support our members. – Grantee Interview*

## Evaluation Question 6. COVID Response Grantmaking Practice

*What modifications did WFF make in its grantmaking approach? What worked well or less well? What can be carried forward in WFF's normal practice? If WFF had to do emergency grantmaking again, what would it do similarly or differently?*

**The Foundation modified several aspects of its grantmaking approach for its COVID Relief Fund grants, including shortening the overall timeline, shifting the responsibility of completing the grant application from grantees to Foundation staff, and getting dollars out the door quickly. Grantees appreciated the streamlined experience and the flexibility of reporting and other requirements.**

The Foundation modified several aspects of its grantmaking approach for its COVID Relief Fund grants, including the role of Program Officers in developing the grants, the processes for internal review and approval, and the sequencing of the process. These modifications allowed the Program Areas to be responsive to emergent needs, shifted much of the responsibility of completing the application process from the grantees to the Foundation, and disbursed funds to grantees quickly.

For the most part, grantees praised the COVID Relief Fund process, appreciating the speed with which the grants were made, the more streamlined grantee experience, and the increased flexibility of the grants both in terms of what was funded and the performance metrics.

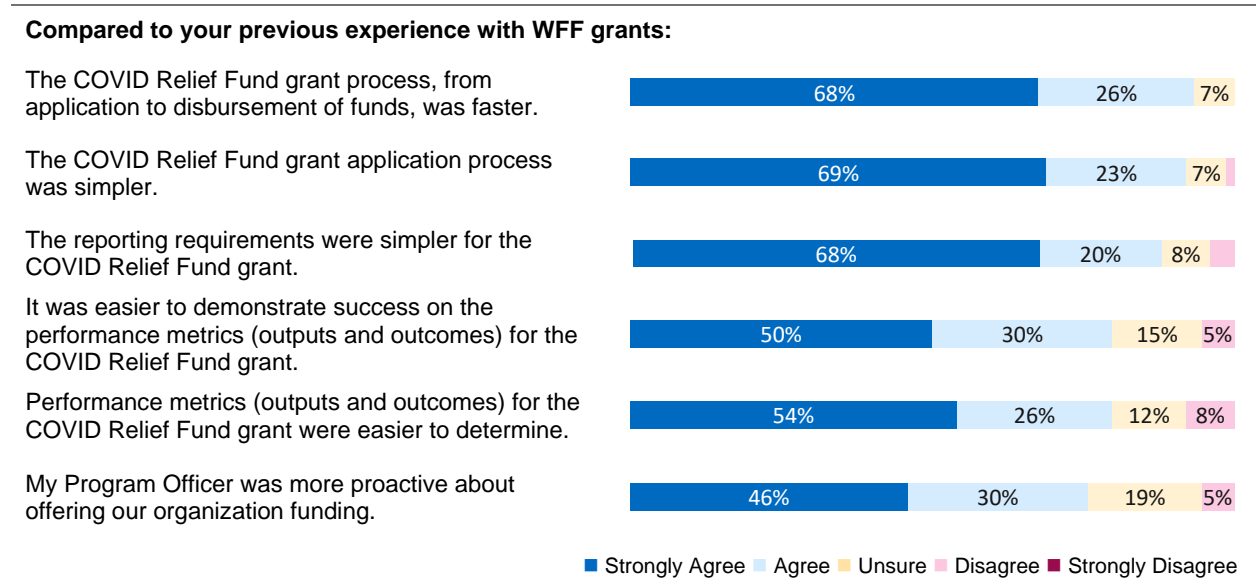
*We were, and continue to be, hugely grateful for the speed with which the WFF reacted to and supported organizations with COVID Relief Fund. We believe that [it] made a difference not only for us, but for other organizations facing tough decisions about the services they provide and the staff they employ. – Grantee Survey*

Nearly all grantees felt the process was faster (94%) and simpler (92%) than their previous experience with WFF grants (Figure 18). Most agreed that the reporting requirements were also simpler (88%). Grantees characterized the process as being more streamlined and were grateful that the application was less burdensome during a time of crisis.

*What I really found great about this [grant process] is that they eliminated the bureaucracy to provide immediate support, which is so important given the sense of urgency organizations had - you have nonprofits who are losing revenue because of contract issues because of COVID-19. And so, I think that was really important [for the Foundation] to rise to this occasion. – Grantee Interview*



Figure 18. The vast majority of grantees found the COVID Relief Fund grant process was easier and faster than traditional WFF grants.



Source: COVID Relief Fund Grantee Survey. Administered December 2021. Only those who indicated that they had received a previous WFF grant were asked these questions, n = 74.

Grantees also appreciated the speed and timeliness of the COVID Relief Fund Grants. Even though grants were made over several months, it seems that the WFF COVID Relief Fund grants were generally well-timed for the individual grantees.

*When we were trying to move fast during such uncertain times, the flexibility and speed of the WFF process for the COVID grants were a welcome relief. It felt great to have them fast track their process. – Grantee Survey*

The Program Officers played a proactive role in the COVID Relief Fund grant process. This was true in the practical sense; Program Officers often drafted the initial grant applications, so grantees didn't have to. But more than that, grantees appreciated that Program Officers took the initiative from the beginning. Program Officers asked grantees what they needed and even offered additional ideas for how the Foundation could support them. Three-quarters of grantees (76%) agreed that Program Officers were more proactive about the COVID Relief Fund compared to regular grantmaking.

*The one thing about this particular relief grant was it was unsolicited. I didn't really know what needs we were going to have in the very beginning. I really did not... It was just more like, 'No, we are going to help you and we're going to give you something to help you through it.' They were just really proactive, which I fully appreciated because as time went on, we really needed it. – Grantee Interview*

Grantees appreciated that the grants were more flexible; they felt they had more leeway than usual to apply the funds where they felt it was most needed. Also, many grantees found the performance metrics easier to determine (80%) and appreciated the changes in relation to performance metrics and reporting.

*It was very helpful that these funds weren't earmarked for something specific, which enabled us to turn around to the schools and networks we fund and allow them to prioritize the needs that were most immediate for their communities. This flexibility was crucial in achieving the mission of truly offering relief instead of the Foundation having determined what schools and others needed and only funding those areas.*  
 – Grantee Survey

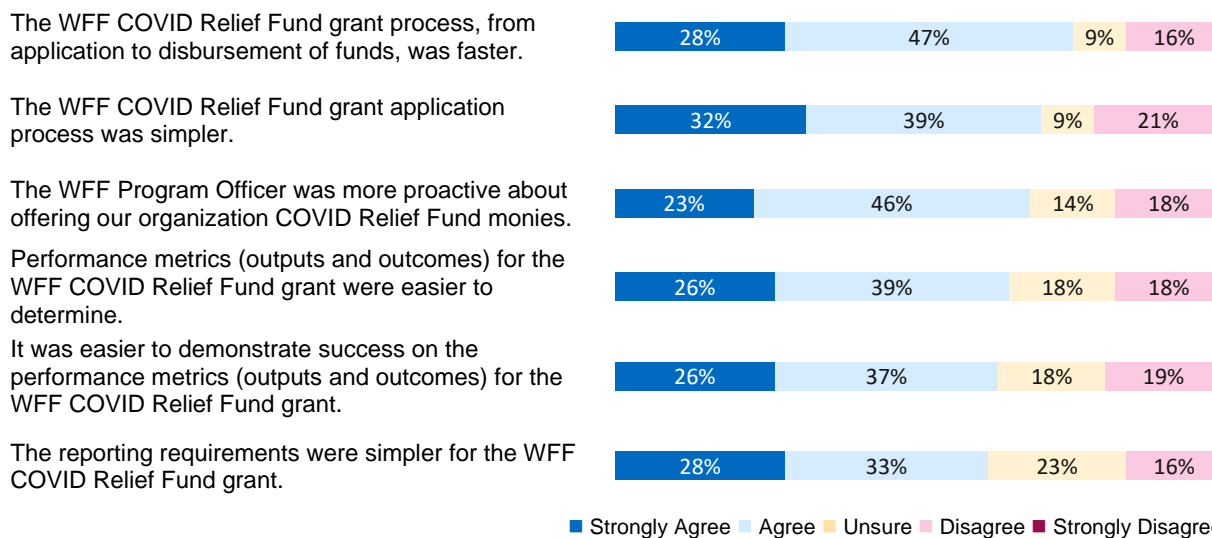
However, some grantees shared that the performance metrics and reporting requirements were still somewhat onerous.

*I struggle with the outcomes and outputs. Our relief for people was a time for us to just show up, to be human. And I did not like having to tie it to other outcomes because it makes it transactional and those aren't actually the types of conversations that we were having with people.* – Grantee Interview

Grantees were asked to compare their experience of the WFF COVID Relief Fund with that of relief funds from similar private foundations. Most grantees felt the process was simpler, faster, and easier compared to other relief funds; however, roughly 20% felt otherwise (Figure 19).

Figure 19. Most grantees reported that the WFF COVID Relief Fund grant process was easier and faster compared to that of other foundations; some disagreed.

**Compared to your experience of receiving COVID relief grants from similar private foundations:**



Source: COVID Relief Fund Grantee Survey. Administered December 2021. Only those who indicated that they had received COVID relief from a similar private foundation were asked these questions, n = 57.

*We did receive COVID relief funding from other donors, but it was not to nearly the magnitude of the Walton Family Foundation, the speed with which they delivered the funding, or the ease of the process. It was wonderful. We did approach other donors asking for emergency relief funds for our partners in other places. I won't name other foundation names, but they pretty much said, 'No, we can't do that for you. So sorry!' I would say Walton was A+ in terms of how it stacked up against other donors.*

*– Grantee Interview*

# CONSIDERATIONS

Based on grantee and staff feedback about the COVID Relief Fund grants, we offer the following considerations for future emergency response funding. These considerations may help the Foundation balance speed and strategic goals:

- As with the COVID Relief Fund, build from existing relationships. For existing grantees in good standing or otherwise previously vetted organizations, streamline the due diligence practices for one-time relief grants. Rely on established relationships with trusted intermediaries to disburse funds quickly and broadly.
- Consider a staggered response, disbursing initial funds quickly and reserving some funds for needs that emerge later.
- As with the COVID Relief Fund, consider streamlining the grant process in order to get grants to grantees quickly, including but not limited to simplifying internal review and approval processes for these grants. If this creates more work for Foundation staff, as it likely will, consider delaying or decreasing other work to accommodate this.
- Simplify metrics and reporting in line with SLED recommendations, especially for initial crisis response. Consider streamlined ways to collect universal metrics, such as the COVID Relief Fund survey fielded by Education to direct-funded schools.
- Lay the groundwork for future emergency response funding. The Foundation should continue to deepen its relationships with communities in line with its access and inclusion goals. The importance of speed in a crisis, the near necessity of relying on existing relationships, and the concerns raised by staff and grantees about access and inclusion, highlight the need to build strong relationships now. By building strong relationships in line with its access and inclusion goals through regular grantmaking, the Foundation will be in a better position to partner with these communities the next time they experience a crisis.

All in all, the COVID Relief Fund enabled the Foundation to try different tactics, demonstrate its commitment to grantees, and sustain its strategy during a very uncertain time. It also afforded many opportunities for the Foundation to reflect and learn about its grantmaking strategies. This evaluation is one such opportunity, along with SLED's grants management recommendations. As we round out the second year of the pandemic, the Foundation should continue to evaluate the impact of the COVID Relief Fund grantmaking on grantees, including those they are sunseting and their newer grantees.

# APPENDIX A. ENUMERATION OF PERFORMANCE MEASURES

Public Profit enumerated the impacts of the COVID Relief Fund grants based on completed performance measures as of June 2021. With guidance from SLED, we organized the grant impacts into the following categories, summing where feasible:

- People Reached – ‘High Touch’
- People Reached – ‘Low Touch’
- Media, Research, and Training Outputs
- Products Delivered – Emergency Response
- Products Delivered – Technology
- Other (Difficult to Categorize) Impacts

*Data Limitation Note:* These enumerations do not paint a complete picture of all the impacts of the COVID Relief Fund. In the interviews, grantees reflected on many more and different impacts, including ripple effects on their organizations and beneficiaries, that are not captured in the performance metrics.

## People Reached – ‘High Touch’

Over 800,000 students/kids and nearly 35,000 families/households were directly reached through the COVID Relief Fund.

### Education

- Students =  $746,139 + 47,675 = 793,814$
- Educators and Staff =  $569,802 + 3,246 = 573,048$
- Researchers = 200
- Families = 29,548
- Schools =  $1,347 + 96 = 1,443$

### Home Region

- Kids/Students = 11,650
- Artists = 36
- Families =  $23 + 114 = 137$
- Small Businesses = 56

### Environment

- Fishers and Farmers =  $1,200 + 600 = 1,800$
- Households with gardens = 5,250
- Crew Members = 4

## People Reached - 'Low Touch'

Over 277 million visits or views of content or media that was developed through the COVID Relief Fund.

### *Education*

- Resource/Website Visitation = 1,459,400
- Resource/Curriculum Downloads = 38,795

### *Home Region*

- Visitors/Attendees = 3,500 + 60 = 3,560
- Arts Online Content Views = 25,720

### *Environment*

- Media Views = 195.5 million + 12.3 million + 68 million = 275,800,000

## Media, Research, and Training Outputs

Over 1,500 news stories/social media posts, nearly 75 research/journalism projects, and over 150 trainings/webinars were conducted through the COVID Relief Fund.

### *Education*

- News Stories/Media Mentions = 1,400
- Research Articles/Projects = 43
- Resources/Tools/Briefs/Curriculum = 550
- Convening/Trainings/Webinars = 153

### *Home Region*

- Arts Online Content Episodes = 15

### *Environment*

- News Stories = 33 + 7 = 40
- Campaign Videos = 2
- Social Media Posts = 77
- Other Journalism Projects = 30

## Products Delivered - Emergency Response

Nearly 170,000 meals and over 65,000 PPE products were purchased and distributed with the monies provided through the COVID Relief Fund.

### *Education*

- Meals = 140,600
- Masks = 45,000

### *Home Region*

- Meals =  $28,000 + 307 + 380 = 28,687$
- Food Boxes = 6,600
- Ventilators = 6
- Masks/Face Coverings = 20,815
- Misters = 16
- Vaccine Doses = 30,000

## Products Delivered – Technology

Over 25,000 technological devices were purchased and distributed with the monies provided through the COVID Relief Fund.

### *Education*

- Hotspots = 12,481
- Chromebooks/Tablets = 10,015

### *Home Region*

- Devices (hotspots, laptops) = 3,309

## Other (Difficult to Categorize) Impacts

Grantees also accomplished a variety of other outcomes that do not fit the aforementioned categories.

### *Home Region*

- Arts organizations = 60
- PPP loans = 3
- Nonprofit organizations supported by LISC across several sectors = 45 (representing 739,100 people)
- Senior serving organizations = 21

### *Environment*

- Fishery Patrols per Month = 28
- Gallons of Water Saved this Year = 4,715,000
- Conservation Policy Priorities Advanced = 3

## APPENDIX B. GRANTEE SURVEY RESULTS

The survey was successfully administered in December 2021 to 267 COVID-19 Relief Fund grantee organizations. We received 101 total responses, 98 of which were valid for a response rate of 37%.<sup>3</sup> The response rate within each Program Area was similar: 47% for Environment, 38% for Home Region, and 34% for Education. The response rate was similar across grant size: 32% response rate for grantees that received a grant for \$20k or less, 38% for \$20-50k grants, 44% for \$50-150k grants, 35% for \$150-500k grants, and 30% for \$500k or more grants.

Table 2. Grantee responses to: **Think about your experience receiving a COVID Relief Fund grant from WFF. Tell us how much you agree or disagree with each statement. Because we received WFF relief funds, our organization...**

Statement	Strongly Agree	Agree	Disagree	Strongly Disagree
...continued working towards our mission throughout the COVID pandemic.	80% (78)	18% (18)	2% (2)	-
...helped beneficiaries achieve better outcomes than they would have otherwise.	76% (74)	24% (24)	-	-
...reached more beneficiaries than we would have otherwise.	73% (72)	22% (22)	4% (4)	-
...had a greater impact on our community than we would have otherwise.	71% (70)	29% (28)	-	-
...laid the groundwork for future efforts beyond immediate COVID response.	57% (56)	34% (33)	7% (7)	2% (2)
...pivoted to new work or opportunities.	45% (44)	34% (33)	18% (18)	3% (3)

Source: COVID Relief Fund Grantee Survey. Administered December 2021, N = 98.

<sup>3</sup> A valid survey is one where 50% or more of the close-ended questions asked of the respondent were answered.



Table 3. Environment grantee responses to: Think about your experience receiving a COVID Relief Fund grant from WFF. Tell us how much you agree or disagree with each statement. Because we received WFF relief funds, our organization...

Statement	Strongly Agree	Agree	Disagree	Strongly Disagree
...continued working towards our mission throughout the COVID pandemic.	88% (7)	13% (1)	-	-
...helped beneficiaries achieve better outcomes than they would have otherwise.	75% (6)	25% (2)	-	-
...had a greater impact on our community than we would have otherwise.	75% (6)	25% (2)	-	-
...reached more beneficiaries than we would have otherwise.	75% (6)	25% (2)	-	-
...laid the groundwork for future efforts beyond immediate COVID response.	63% (5)	25% (2)	13% (1)	-
...pivoted to new work or opportunities.	50% (4)	38% (3)	13% (1)	-

Source: COVID Relief Fund Grantee Survey. Administered December 2021, Environment n = 8.

Table 4. Home Region grantee responses to: Think about your experience receiving a COVID Relief Fund grant from WFF. Tell us how much you agree or disagree with each statement. Because we received WFF relief funds, our organization...

Statement	Strongly Agree	Agree	Disagree	Strongly Disagree
...helped beneficiaries achieve better outcomes than they would have otherwise.	93% (14)	7% (1)	-	-
...reached more beneficiaries than we would have otherwise.	93% (14)	7% (1)	-	-
...had a greater impact on our community than we would have otherwise.	87% (13)	13% (2)	-	-
...continued working towards our mission throughout the COVID pandemic.	87% (13)	13% (2)	-	-
...pivoted to new work or opportunities.	73% (11)	20% (3)	7% (1)	-
...laid the groundwork for future efforts beyond immediate COVID response.	67% (10)	33% (5)	-	-

Source: COVID Relief Fund Grantee Survey. Administered December 2021, Home Region n = 15.

Table 5. Education grantee responses to: Think about your experience receiving a COVID Relief Fund grant from WFF. Tell us how much you agree or disagree with each statement. Because we received WFF relief funds, our organization...

Statement	Strongly Agree	Agree	Disagree	Strongly Disagree
...continued working towards our mission throughout the COVID pandemic.	77% (58)	20% (15)	3% (2)	-
...helped beneficiaries achieve better outcomes than they would have otherwise.	72% (54)	28% (21)	-	-
...reached more beneficiaries than we would have otherwise.	69% (52)	25% (19)	5% (4)	-
...had a greater impact on our community than we would have otherwise.	68% (51)	32% (24)	-	-
...laid the groundwork for future efforts beyond immediate COVID response.	55% (41)	35% (26)	8% (6)	3% (2)
...pivoted to new work or opportunities.	39% (29)	36% (27)	21% (16)	4% (3)

Source: COVID Relief Fund Grantee Survey. Administered December 2021, Education n = 75.

Table 6. Grantee responses to: [My organization was concerned about our future financial sustainability.](#)

<b>Response</b>	<b>Before receiving the COVID Relief Fund grant</b>	<b>After receiving the COVID Relief Fund grant</b>
Strongly Agree	34% (33)	10% (10)
Agree	39% (38)	47% (46)
Disagree	19% (19)	31% (30)
Strongly Disagree	7% (7)	10% (10)
Unsure	1% (1)	2% (2)

Source: COVID Relief Fund Grantee Survey. Administered December 2021, N = 98.

Table 7. Grantee responses to: [My organization was concerned about our future financial sustainability.](#)

<b>Program Area</b>	<b>Improved</b>	<b>Stayed the Same</b>	<b>Worsened</b>
Environment	63% (5)	38% (3)	-
Home Region	60% (6)	40% (4)	-
Education	53% (27)	47% (24)	-
Overall	55% (38)	45% (31)	-

Source: COVID Relief Fund Grantee Survey. Administered December 2021. Three cases were dropped from this analysis (Education) due to “Unsure” response in pre- and/or post-question and 26 cases were dropped from this analysis (five in Home Region and 21 in Education) due to “Strongly Disagree” or “Disagree” response in the pre-question, n = 69.

Table 8. Grantee responses to: [My organization had to or considered laying off employees.](#)

<b>Response</b>	<b>Before receiving the COVID Fund Relief grant</b>	<b>After receiving the COVID Relief Fund grant</b>
Strongly Agree	16% (16)	2% (2)
Agree	23% (23)	15% (15)
Disagree	42% (41)	35% (34)
Strongly Disagree	14% (14)	47% (46)
Unsure	4% (4)	1% (1)

Source: COVID Relief Fund Grantee Survey. Administered December 2021, N = 98.

Table 9. Grantee responses to: [My organization had to or considered laying off employees.](#)

Program Area	Improved	Stayed the Same	Worsened
Environment	100% (3)	-	-
Home Region	86% (6)	14% (1)	-
Education	76% (22)	24% (7)	-
Overall	79% (31)	21% (8)	-

Source: COVID Relief Fund Grantee Survey. Administered December 2021. Five cases were dropped from this analysis (one in Environment and four in Education) due to “Unsure” response in pre- and/or post-question and 54 cases were dropped from this analysis (four in Environment, eight in Home Region, and 42 in Education) due to “Strongly Disagree” or “Disagree” response in the pre-question, n = 39.

Table 10. Grantee responses to: [My organization had to cut or downsize programming.](#)

Response	Before receiving the COVID Relief Fund grant	After receiving the COVID Relief Fund grant
Strongly Agree	23% (23)	4% (4)
Agree	40% (39)	14% (14)
Disagree	28% (27)	46% (45)
Strongly Disagree	8% (8)	35% (34)
Unsure	1% (1)	1% (1)

Source: COVID Relief Fund Grantee Survey. Administered December 2021, N = 98.

Table 11. Grantee responses to: [My organization had to cut or downsize programming.](#)

Program Area	Improved	Stayed the Same	Worsened
Environment	60% (3)	40% (2)	-
Home Region	82% (9)	18% (2)	-
Education	85% (39)	15% (7)	-
Overall	82% (51)	18% (11)	-

Source: COVID Relief Fund Grantee Survey. Administered December 2021. Two cases were dropped from this analysis (Education) due to “Unsure” response in pre- and/or post-question and 34 cases were dropped from this analysis (three in Environment, four in Home Region, and 27 in Education) due to “Strongly Disagree” or “Disagree” response in the pre-question, n = 62.

Table 12. Grantee responses to: [My organization was actively seeking sources of relief funding.](#)

<b>Response</b>	<b>Before receiving the COVID Relief Fund grant</b>	<b>After receiving the COVID Relief Fund grant</b>
Strongly Agree	45% (44)	24% (24)
Agree	33% (32)	48% (47)
Disagree	11% (11)	13% (13)
Strongly Disagree	6% (6)	9% (9)
Unsure	5% (5)	5% (5)

Source: COVID Relief Fund Grantee Survey. Administered December 2021, N = 98.

Table 13. Grantee responses to: [My organization was actively seeking sources of relief funding.](#)

<b>Program Area</b>	<b>More So</b>	<b>Stayed the Same</b>	<b>Less So</b>
Environment	29% (2)	71% (5)	-
Home Region	50% (6)	50% (6)	-
Education	36% (20)	61% (34)	4% (2)
Overall	37% (28)	60% (45)	3% (2)

Source: COVID Relief Fund Grantee Survey. Administered December 2021. Six cases were dropped from this analysis (Education) due to “Unsure” response in pre- and/or post- question and 17 cases were dropped from this analysis (one in Environment, three in Home Region, and 13 in Education) due to “Strongly Disagree” or “Disagree” response in the pre-question, n = 75.

Table 14. Grantee responses to: [Prior to the COVID Relief Fund, had you received a previous grant from WFF?](#)

<b>Program Area</b>	<b>No</b>	<b>Yes</b>
Environment	-	100% (8)
Home Region	13% (2)	87% (13)
Education	29% (22)	71% (53)

Source: COVID Relief Fund Grantee Survey. Administered December 2021, N = 98. The response “No” would mean the respondent is a new grantee, whereas the response “Yes” would mean they are an existing or former grantee.

Table 15. Grantee responses to: Think about your experience receiving a COVID Relief Fund grant from WFF. Compared to your previous experience with WFF grants:

Statement	Strongly Agree	Agree	Disagree	Strongly Disagree	Unsure
The COVID Relief Fund grant application process was simpler.	69% (51)	23% (17)	1% (1)	-	7% (5)
The COVID Relief Fund grant process, from application to disbursement of funds, was faster.	68% (50)	26% (19)	-	-	7% (5)
The reporting requirements were simpler for the COVID Relief Fund grant.	68% (50)	20% (15)	4% (3)	-	8% (6)
Performance metrics (outputs and outcomes) for the COVID Relief Fund grant were easier to determine.	54% (40)	26% (19)	8% (6)	-	12% (9)
It was easier to demonstrate success on the performance metrics (outputs and outcomes) for the COVID Relief Fund grant.	50% (37)	30% (22)	5% (4)	-	15% (11)
My Program Officer was more proactive about offering our organization funding.	46% (34)	30% (22)	5% (4)	-	19% (14)

Source: COVID Relief Fund Grantee Survey. Administered December 2021. Only those who indicated that they had received a previous WFF grant were asked these questions, n = 74.

Table 16. Environment grantee responses to: Think about your experience receiving a COVID Relief Fund grant from WFF. Compared to your previous experience with WFF grants:

Statement	Strongly Agree	Agree	Disagree	Strongly Disagree	Unsure
Performance metrics (outputs and outcomes) for the COVID Relief Fund grant were easier to determine.	88% (7)	-	-	-	13% (1)
It was easier to demonstrate success on the performance metrics (outputs and outcomes) for the COVID Relief Fund grant.	75% (6)	13% (1)	-	-	13% (1)
The COVID Relief Fund grant process, from application to disbursement of funds, was faster.	75% (6)	25% (2)	-	-	-
The reporting requirements were simpler for the COVID Relief Fund grant.	75% (6)	13% (1)	-	-	13% (1)
The COVID Relief Fund grant application process was simpler.	75% (6)	25% (2)	-	-	-
My Program Officer was more proactive about offering our organization funding.	50% (4)	38% (3)	-	-	13% (1)

Source: COVID Relief Fund Grantee Survey. Administered December 2021. Only those who indicated that they had received a previous WFF grant were asked these questions, Environment n = 8.



Table 17. Home Region grantee responses to: Think about your experience receiving a COVID Relief Fund grant from WFF. Compared to your previous experience with WFF grants:

Statement	Strongly Agree	Agree	Disagree	Strongly Disagree	Unsure
The COVID Relief Fund grant process, from application to disbursement of funds, was faster.	54% (7)	38% (5)	-	-	8% (1)
The COVID Relief Fund grant application process was simpler.	54% (7)	31% (4)	8% (1)	-	8% (1)
My Program Officer was more proactive about offering our organization funding.	46% (6)	38% (5)	8% (1)	-	8% (1)
The reporting requirements were simpler for the COVID Relief Fund grant.	46% (6)	15% (2)	23% (3)	-	15% (2)
It was easier to demonstrate success on the performance metrics (outputs and outcomes) for the COVID Relief Fund grant.	38% (5)	15% (2)	23% (3)	-	23% (3)
Performance metrics (outputs and outcomes) for the COVID Relief Fund grant were easier to determine.	38% (5)	23% (3)	23% (3)	-	15% (2)

Source: COVID Relief Fund Grantee Survey. Administered December 2021. Only those who indicated that they had received a previous WFF grant were asked these questions, Home Region n = 13.

Table 18. Education grantee responses to: Think about your experience receiving a COVID Relief Fund grant from WFF. Compared to your previous experience with WFF grants:

Statement	Strongly Agree	Agree	Disagree	Strongly Disagree	Unsure
The reporting requirements were simpler for the COVID Relief Fund grant.	72% (38)	23% (12)	-	-	6% (3)
The COVID Relief Fund grant application process was simpler.	72% (38)	21% (11)	-	-	8% (4)
The COVID Relief Fund grant process, from application to disbursement of funds, was faster.	70% (37)	23% (12)	-	-	8% (4)
Performance metrics (outputs and outcomes) for the COVID Relief Fund grant were easier to determine.	53% (28)	30% (16)	6% (3)	-	11% (6)
It was easier to demonstrate success on the performance metrics (outputs and outcomes) for the COVID Relief Fund grant.	49% (26)	36% (19)	2% (1)	-	13% (7)
My Program Officer was more proactive about offering our organization funding.	45% (24)	26% (14)	6% (3)	-	23% (12)

Source: COVID Relief Fund Grantee Survey. Administered December 2021. Only those who indicated that they had received a previous WFF grant were asked these questions, Education n = 53.

Table 19. Grantees responses to: **Did you receive COVID relief funds from private foundations other than WFF?**

<b>Program Area</b>	<b>No</b>	<b>Yes</b>
Environment	25% (2)	75% (6)
Home Region	40% (6)	60% (9)
Education	44% (33)	56% (42)

Source: COVID Relief Fund Grantee Survey. Administered December 2021, N = 98.

Table 20. Grantee responses to: **Think about your experience receiving a COVID Relief Fund grant from WFF. Compared to the experience of receiving COVID relief grants from similar private foundations:**

<b>Statement</b>	<b>Strongly Agree</b>	<b>Agree</b>	<b>Disagree</b>	<b>Strongly Disagree</b>	<b>Unsure</b>
The WFF COVID Relief Fund grant application process was simpler.	32% (18)	39% (22)	21% (12)	-	9% (5)
The WFF COVID Relief Fund grant process, from application to disbursement of funds, was faster.	28% (16)	47% (27)	16% (9)	-	9% (5)
The reporting requirements were simpler for the WFF COVID Relief Fund grant.	28% (16)	33% (19)	16% (9)	-	23% (13)
It was easier to demonstrate success on the performance metrics (outputs and outcomes) for the WFF COVID Relief Fund grant.	26% (15)	39% (22)	18% (10)	-	18% (10)
Performance metrics (outputs and outcomes) for the WFF COVID Relief Fund grant were easier to determine.	26% (15)	37% (21)	19% (11)	-	18% (10)
The WFF Program Officer was more proactive about offering our organization COVID Relief Fund monies.	23% (13)	46% (26)	18% (10)	-	14% (8)

Source: COVID Relief Fund Grantee Survey. Administered December 2021. Only those who indicated that they had received COVID relief from a similar private foundation were asked these questions, n = 57.

Table 21. Environment grantee responses to: Think about your experience receiving a COVID Relief Fund grant from WFF. Compared to the experience of receiving COVID relief grants from similar private foundations:

Statement	Strongly Agree	Agree	Disagree	Strongly Disagree	Unsure
It was easier to demonstrate success on the performance metrics (outputs and outcomes) for the WFF COVID Relief Fund grant.	50% (3)	-	33% (2)	-	17% (1)
The reporting requirements were simpler for the WFF COVID Relief Fund grant.	50% (3)	-	33% (2)	-	17% (1)
The WFF COVID Relief Fund grant application process was simpler.	50% (3)	-	50% (3)	-	-
Performance metrics (outputs and outcomes) for the WFF COVID Relief Fund grant were easier to determine.	33% (2)	-	67% (4)	-	-
The WFF COVID Relief Fund grant process, from application to disbursement of funds, was faster.	33% (2)	17% (1)	50% (3)	-	-
The WFF Program Officer was more proactive about offering our organization COVID Relief Fund monies.	33% (2)	33% (2)	33% (2)	-	-

Source: COVID Relief Fund Grantee Survey. Administered December 2021. Only those who indicated that they had received COVID relief from a similar private foundation were asked these questions, Environment n = 6.

Table 22. Home Region grantee responses to: Think about your experience receiving a COVID Relief Fund grant from WFF. Compared to the experience of receiving COVID relief grants from similar private foundations:

Statement	Strongly Agree	Agree	Disagree	Strongly Disagree	Unsure
The WFF COVID Relief Fund grant process, from application to disbursement of funds, was faster.	56% (5)	44% (4)	-	-	-
The WFF Program Officer was more proactive about offering our organization COVID Relief Fund monies.	56% (5)	33% (3)	11% (1)	-	-
The WFF COVID Relief Fund grant application process was simpler.	44% (4)	22% (2)	11% (1)	-	22% (2)
It was easier to demonstrate success on the performance metrics (outputs and outcomes) for the WFF COVID Relief Fund grant.	33% (3)	22% (2)	22% (2)	-	22% (2)
Performance metrics (outputs and outcomes) for the WFF COVID Relief Fund grant were easier to determine.	33% (3)	44% (4)	11% (1)	-	11% (1)
The reporting requirements were simpler for the WFF COVID Relief Fund grant.	33% (3)	44% (4)	11% (1)	-	11% (1)

Source: COVID Relief Fund Grantee Survey. Administered December 2021. Only those who indicated that they had received COVID relief from a similar private foundation were asked these questions, Home Region n = 9.

Table 1. Education grantee responses to: Think about your experience receiving a COVID Relief Fund grant from WFF. Compared to the experience of receiving COVID relief grants from similar private foundations:

Statement	Strongly Agree	Agree	Disagree	Strongly Disagree	Unsure
The WFF COVID Relief Fund grant application process was simpler.	26% (11)	48% (20)	19% (8)	-	7% (3)
Performance metrics (outputs and outcomes) for the WFF COVID Relief Fund grant were easier to determine.	24% (10)	40% (17)	14% (6)	-	21% (9)
The reporting requirements were simpler for the WFF COVID Relief Fund grant.	24% (10)	36% (15)	14% (6)	-	26% (11)
It was easier to demonstrate success on the performance metrics (outputs and outcomes) for the WFF COVID Relief Fund grant.	21% (9)	48% (20)	14% (6)	-	17% (7)
The WFF COVID Relief Fund grant process, from application to disbursement of funds, was faster.	21% (9)	52% (22)	14% (6)	-	12% (5)
The WFF Program Officer was more proactive about offering our organization COVID Relief Fund monies.	14% (6)	50% (21)	17% (7)	-	19% (8)

Source: COVID Relief Fund Grantee Survey. Administered December 2021. Only those who indicated that they had received COVID relief from a similar private foundation were asked these questions, Education n = 42.

Table 2. Grantee responses to: **How would you rate your organization’s relationship with WFF before and after receiving a COVID Relief Fund grant?**

<b>Relationship Rating</b>	<b>Before COVID Relief grant</b>	<b>After COVID Relief grant</b>
Excellent	56% (55)	69% (68)
Good	27% (26)	24% (24)
Fair	7% (7)	6% (6)
Poor	-	-
No prior relationship	10% (10)	-

Source: COVID Relief Fund Grantee Survey. Administered December 2021, N = 98.

Table 25. Grantee responses to: **How would you rate your organization’s relationship with WFF before and after receiving a COVID Relief Fund grant?**

<b>Program Area</b>	<b>Improved</b>	<b>Stayed the Same</b>	<b>Worsened</b>
Environment	25% (2)	75% (6)	-
Home Region	21% (3)	79% (11)	-
Education	14% (9)	83% (55)	3% (2)
Overall	16% (14)	82% (72)	2% (2)

Source: COVID Relief Fund Grantee Survey. Administered December 2021. Ten cases were dropped from this analysis (one in Home Region and nine in Education) due to “No prior relationship” response in pre- question, n = 88

# APPENDIX C. EVALUATION INSTRUMENTS

## 1. Staff (Key Informant) Interview

### *Opening Script (~ 8 minutes)*

*[Introduce ourselves.]*

The purpose of the interview is to learn from your experiences being on the front lines of the Walton Family Foundation's COVID Fund grantmaking and capture lessons that the Walton Family Foundation can use in future rapid response / emergency situations, as well as in its regular operations. The Walton Family Foundation has asked us, Public Profit, to conduct the evaluation in partnership with the SLED team.

Today, we are interested in hearing your reflections on the COVID Fund grantmaking: how this grantmaking was different than other Walton Family Foundation grantmaking; what was successful and what, if anything, was less successful; how this grantmaking affected relationships between the Walton Family Foundation and grantees; how this grantmaking aligned with your program's Strategy25 plan; and what you hope to bring forward into future grantmaking strategy.

On July 30<sup>th</sup>, we will be facilitating a focus group with additional Walton Family Foundation staff for this same purpose. We will share our findings with the Walton Family Foundation later this year. These findings will draw from the staff interviews and focus group, as well as from grant reports, grantee interviews, and a grantee survey.

We will be taking notes throughout this interview, but we will also record so we can create a transcript to review afterward. We will not be sharing raw notes, the recording, or the transcripts outside of Public Profit. We are turning on the recording now.

*[Pause here to turn on recording.]*

If we use quotes, they will be anonymous (e.g., "Program Officer" instead of someone's name). Each Program Area will have a chance to review findings before they are shared with the Leadership Team and/or the Board. Please feel free to skip any question at any time. Also, feel free to let us know at any point in the interview if you would like to share something off the record or strike something from our notes.

Do you have any questions about anything I've said so far?

### *Protocol (~ 45 minutes)*

Please describe your role at the Foundation.

- Probe: What do you work on primarily?
- Probe: What was your role vis-à-vis the COVID Relief Fund grantmaking?



In what ways did the grantmaking match the initial plan for the COVID Relief Fund?

- Probe: Ask for an example of a grant or type of grant that aligned well with the initial plan.
- Probe: In what ways did the grantmaking diverge from the initial plan?
  - Probe: Ask for an example of a grant or type of grant that did not end up aligning well with the initial plan.
  - Probe: What factors caused grants to diverge?

In what ways did the grantmaking align with your program's Strategy25 plan?

- Probe: In what ways did it not align?

To what extent was the grantmaking successful (some, a lot, completely)?

In what ways was it successful?

- Probe: In what ways did it meet the goals of the initial plan for the COVID Relief Fund?
- Probe: In what ways did it meet the Strategy25 goals?
- Probe: In what ways did it build a positive relationship / trust between the grantees and the Foundation?
- Probe: In what other ways was it successful?

In what ways was it less successful?

- Probe: Were there specific grants that were less successful? In what ways were those less successful?

With hindsight, what would you have done differently?

- Probe: What could have been done better to fulfill the goals of the COVID Relief Fund?
- Probe: What could have been done better to align with the Strategy25 goals?
- Probe: What could have been done to build a stronger relationship between the grantees and the Foundation?

What have you learned from the COVID Relief Fund grantmaking that you want to apply to current and future grantmaking?

What would you keep doing?

- Probe: What is something new you tried with the COVID Fund that you want to keep doing in current and future grantmaking?

What would you do differently?

What else do you think we should know?

### *Closing (~ 2 minutes)*

- How to reach us with any follow up comments or questions
- How and when we will be sharing the findings
- Appreciation for participants' time

## **2. Staff Focus Group**

### *Opening (~ 5 minutes)*

*[Introduce ourselves.]*

The purpose of the focus group is to learn from your experiences being on the front lines of WFF's Covid Fund grantmaking and capture lessons that WFF can use in future rapid response / emergency situations, as well as in its regular operations. WFF has asked us, Public Profit, to conduct the evaluation in partnership with the SLED team.

Today, we are interested in hearing your reflections on the COVID Fund grantmaking: how this grantmaking was different than other WFF grantmaking; what was successful and what, if anything, was less successful; how this grantmaking affected relationships between WFF and grantees; how this grantmaking aligned with your program's Strategy25 plan; and what you hope to bring forward into future grantmaking strategy.

We will share our findings with WFF later this year. These findings will draw from the staff interviews and this focus group, as well as from grant reports, grantee interviews, and a grantee survey.

We will be taking notes throughout this focus group, but we would also be recording so we can create or add to our notes afterward. We will not be sharing raw notes, the recording, or any transcripts outside of Public Profit. If we use quotes, they will be anonymous (e.g., "Program Officer" instead of someone's name). Each participant and Program Area will have a chance to review findings before they are shared with the Leadership Team and/or the Board.

Do you have any questions about anything I've said so far?

### *Introductions + settling in (~ 10 minutes)*

Short intros: Name, Program Area, and one sentence about what you work on.

### *Program Area Reflections (~25 minutes)*

*[Share slides / Jamboard summarizing each Program's COVID response and Strategy25]*

In what ways did the grantmaking match the initial plan for the Covid fund? (10 minutes)

- Probe: In what ways did the grantmaking diverge from the initial plan?

In what ways were grants successful? (20 minutes for this and for the "less successful" question)

*[Encourage people to share ideas verbally or using the Jamboard stickies along the following domains:*

- *Grantee sustainability*
- *Community Impact*
- *Enacting Strategy<sup>25</sup>*
- *Building relationships between the grantees and the Foundation*
- *Other]*
- Probes:
  - Setting up for future success (individual grantees, the Foundation's/Program Area's strategy, policy and advocacy efforts, etc.)
  - Shifts/pivots (change) v. sustaining strengths (stability) on any dimension
  - Relationships between the Foundation and the communities it serves

In what ways were they less successful?

*Break (~5 minutes)*

*Reflection (~20 minutes)*

Looking at the Jamboards, what is similar across Program Areas? What is different?

- Probes:
  - Types of successes or challenges
  - Types of grantees
  - Logistics of grantmaking
  - Community impacts, including how it was measured
  - Alignment with Program Areas' Strategy<sup>25</sup> plans
  - Grantee sustainability
  - Grantee-Foundation relationships

*Interpretation (~20 minutes)*

What have you learned from the COVID Relief Fund grantmaking that you want to apply to current and future grantmaking?

- Probe: What is something new you tried with the COVID Relief Fund that you want to keep doing in current and future grantmaking?

What would you do differently?

*[Jamboard with "Keep Doing" and "Do Differently" headers for folks who want to type their response]*

*Closing (~5 minutes)*

- How to reach us with any follow up comments or questions
- How and when we will be sharing the findings

- Appreciation for participants' time

### 3. Grantee Interview

#### *Opening*

My name is [name] and I am a [role] at Public Profit. Here with me is my colleague, [name], who also works at Public Profit. Public Profit is an evaluation and strategy firm based in Oakland, CA. We help mission-driven organizations deepen their ability to learn from data, make great decisions, and improve the effectiveness and quality of their services.

In March 2020, the Walton Family Foundation responded to the emergence of the COVID-19 pandemic by establishing an emergency grant fund to quickly deploy support to grantees and communities in response to the significant and evolving effects of the pandemic.

To help the foundation learn more about the impact of these funds on grantees and communities, and inform future rapid or emergency response grantmaking, WFF is partnering with Public Profit, an independent evaluation firm, to conduct a retrospective evaluation.

We are interested in your perspective as a recipient of WFF's COVID Relief Fund. Our goal is to better understand the specific impact that COVID Relief Fund grants had on select WFF grantees and anything else you'd like to share with WFF about the grant or grantmaking experience. Topics to be discussed include:

- Impacts that were expected and achieved by your organization due to the COVID Relief Fund grant,
- How this funding supported your organization's financial sustainability and stability during the pandemic, and
- How the COVID Relief Fund grant has affected your relationship with WFF.

Recording and Confidentiality: [Notetaker name] will be taking notes during the interview and we would like your permission to record. We will not share the raw notes, recording, or transcript outside of Public Profit. That said, if you say something that you want "off the record," just let us know and we will be sure to leave it out of anything we write. Do we have your permission to record?

*[Pause to begin the recording.]*

We may want to include quotes from this interview in our reporting to WFF. If we do, they will not be attributed to your name, but we will indicate the Program Area. Do we have your permission to include direct quotes?

Any questions for us before we get started?

As a reminder, we are asking questions today about the grant(s) you received under the Walton Family Foundation's COVID Fund: [name the grants]

*[A Note on Overarching Probes: Throughout, Public Profit will listen for and then probe on the emerging themes listed below in addition to those probes specifically mentioned at different points in the protocol.]*

- *The strengths and drawbacks of intermediaries*
- *Responsive relief versus grants in support of strategic initiatives*
- *Shifting needs/response as the pandemic unfolds*
- *Pandemic pivots*
- *A range of outcomes]*

### **Grantmaking Process**

In your own words, what was the original intent of the grant?

How was your experience of this grant similar to your experience with other WFF grants? How was it different? *[If they have never received a WFF grant in the past, use the prompts and ask them to compare with another major funder.]*

- Prompt: How was the grant written? What was your process with the Program Officer?
- Prompt: What was the timeline for getting the grant?
  - Possible probes: faster, better, easier/harder, more/less confusing, delayed, etc.
- Prompt: How did you determine the performance metrics (outputs and outcomes) for this grant?
  - Possible probes: easier, more collaborative/directive, more/less relevant, etc.

### **Impacts of the Grant**

What was the most important outcome of this grant? *[Listen for the following: beneficiary basic needs, beneficiary pivots/future planning, staff positions/layoffs, staff development/retraining, program pivots, technology, facilities/locations, documentation/messaging/planning projects, financial preservation/endowments, etc.]*

- Prompt: For your beneficiaries?
- Prompt: For your organization?

What was the biggest challenge to reaching the goals that were set for this grant?

### **Sustainability and Stability**

Did the grant help your organization survive during the ongoing disruption of the pandemic? If so, in what ways? *[Probe for non-financial ways if needed]*

In what ways did it help you pivot or set you up for success in the future? *[Listen for and probe on, if needed: sustainability, stability, resilience, capacity-building, etc.]*

### *Relationship with the Foundation*

How would you rate your organization's relationship with the Foundation prior to COVID? Please rate: Excellent, good, fair, or poor. *[Skip this first rating scale if they have did not have a prior relationship.]*

How would you rate your organization's relationship with the Foundation now? Please rate: Excellent, good, fair or poor.

- Prompt: How would you describe this change (if any)?

In what ways did this grant affect that relationship? *[Probe for different actors (the interviewee individually, their staff/board/organization collectively, the Foundation collectively, Program Officers individually, etc.)]*

What else affected that relationship?

How was your experience of this grant similar to your experience of other sources of COVID-related support? *[Listen for and probe on, if needed: trust, credibility, measurement, clarity, grantee needs, foundation strategy, etc.]*

- Prompt: How was it different?

### *Feedback for the Foundation*

What did the Foundation do particularly well in the COVID Fund grantmaking? What do you wish the Foundation had done differently? *[Probe for how WFF's response could best support their organizations and beneficiaries.]*

Is there anything else you think we should know about your experience with the WFF COVID Relief Fund grantmaking?

- Prompt: About your experience with the Foundation as a whole?

### *Closing*

- How to reach us with any follow up comments or questions
- Appreciation for the participant's time

## **4. Grantee Survey**

### *Introduction*

In March 2020, the Walton Family Foundation (WFF) responded to the emergence of the COVID-19 pandemic by establishing an emergency grant fund to quickly deploy support to grantees and communities in response to the significant and evolving effects of the pandemic.

Your feedback and opinions as a COVID Relief Fund grantee will help WFF learn more about the impact of these funds as well as strengthen WFF's emergency relief grantmaking process in the future.

We ask that you complete one survey per organization. Your individual responses are confidential and will be reported to WFF staff only in aggregate. Your honest answers are appreciated.

For open-ended questions, you may keep responses brief; we suggest no more than 2-3 sentences per question. We estimate this survey will take approximately 15-20 minutes to complete.

### *Impacts*

Think about your experience receiving a COVID Relief Fund grant from WFF. Tell us how much you agree or disagree with each statement. Because we received WFF relief funds, our organization...

*[Strongly Agree/Agree/Disagree/Strongly Disagree]*

- ...continued working towards our mission throughout the COVID pandemic.
- ...reached more beneficiaries than we would have otherwise.
- ...helped beneficiaries achieve better outcomes than they would have otherwise.
- ...had a greater impact on our community than we would have otherwise.
- ...pivoted to new work or opportunities.
- ...laid the groundwork for future efforts beyond immediate COVID response.

Please describe one way your organization benefitted from receiving a WFF COVID Relief Fund grant.

*[Open-ended]*

Please describe one way the community you serve has benefitted from your receipt of a WFF COVID Relief Fund grant. *[Open-ended]*

If your organization was able to pivot to new work or opportunities due to receiving a WFF COVID Relief Fund grant, please explain. *[Open-ended]*

### *Financial Sustainability*

Think back to the very early days of the pandemic (March-April 2020), BEFORE your organization received a COVID Relief Fund grant from WFF. Please respond to the following statements regarding your organization's financial health at that time. My organization was... *[Strongly*

*Agree/Agree/Disagree/Strongly Disagree/Unsure]*

- ...concerned about our future sustainability.
- ...considering or had to lay off employees.
- ...considering or had to cut/downsize programming.
- ...actively seeking sources of relief funding.

Please respond to the following statements regarding your organization's financial health AFTER receiving a COVID Relief Fund grant from WFF. My organization... *[Strongly*

*Agree/Agree/Disagree/Strongly Disagree/Unsure]*

- ...was still concerned about our future sustainability.

- ...still had to lay off employees.
- ...still had to cut or downsize programming.
- ...was still actively seeking sources of relief funding.

Please explain: to what extent did the WFF COVID Relief Fund grant contribute to your financial sustainability during this time? *[Open-ended]*

### *Grantmaking Process (Application and Administration)*

Prior to the COVID Relief Fund, had you received a previous grant from WFF? *[Yes/No]*

*[If Yes]* Think about your experience receiving a COVID Relief Fund grant from WFF. Compared to your previous experience with WFF grants: *[Strongly Agree/Agree/Disagree/Strongly Disagree/Unsure]*

- My Program Officer was more proactive about offering our organization funding.
- The COVID Relief Fund grant process, from application to disbursement of funds, was faster.
- The COVID Relief Fund grant application process was simpler.
- Performance metrics (outputs and outcomes) for the COVID Relief Fund grant were easier to determine.
- It was easier to demonstrate success on the performance metrics (outputs and outcomes) for the COVID Relief Fund grant.
- The reporting requirements were simpler for the COVID Relief Fund grant.

Which of these changes, if any, were most important and/or useful to your organization?

*[All respondents]* Did you receive COVID relief funds from private foundations other than WFF? *[Yes/No]*

*[If Yes]* Think about your experience receiving a COVID Relief Fund grant from WFF. Compared to the experience of receiving COVID relief grants from similar private foundations: *[Strongly Agree/Agree/Disagree/Strongly Disagree/Unsure]*

- The WFF Program Officer was more proactive about offering our organization COVID Relief Fund monies.
- The WFF COVID Relief Fund grant process, from application to disbursement of funds, was faster.
- The WFF COVID Relief Fund grant application process was simpler.
- Performance metrics (outputs and outcomes) for the WFF COVID Relief Fund grant were easier to determine.
- It was easier to demonstrate success on the performance metrics (outputs and outcomes) for the WFF COVID Relief grant.
- The reporting requirements were simpler for the WFF COVID Relief Fund grant.



### *Relationship with the Foundation*

How would you rate your organization's relationship with WFF prior to receiving a COVID Relief Fund grant? *[Excellent, Good, Fair, Poor, No prior relationship]*

*[If Excellent, Good, Fair, or Poor]* How would you rate your organization's relationship with WFF now?  
*[Excellent, Good, Fair, Poor]*

How did receiving a COVID Relief Fund grant affect your relationship with WFF? *[Open-ended]*

### *General Feedback*

Is there anything else you'd like us to know about your WFF COVID Relief Fund experience? *[Open-ended]*

# APPENDIX D. METHODOLOGY AND LIMITATIONS

## Survey Analysis Methodology (Closed-Ended Items)

Survey results were originally disaggregated by both Program Area and grant size. For grant size, we divided the responding organizations into five groups of roughly the same number of grantees. First, we divided them into quintiles based on grant size. Then, we adjusted the groups so grants of the same size were in the same group. For example, many Education grants were \$20,000, so those grants appeared in both the 1<sup>st</sup> and 2<sup>nd</sup> quintile, but for the purpose of analysis, we included them all in the 1<sup>st</sup> group, adjusting subsequent groups in a similar way.

Disaggregation by Program Area included meaningful differences and was included in the report. Disaggregation by grant size did not yield interpretable, meaningful differences and was not included.

## Qualitative Analysis Methodology

Public Profit used several qualitative approaches to inform the analysis of data from the grantee and staff interviews, grant documentation, and open-ended survey responses included in this report. For each data source, the evaluation team analyzed within Program Area first, then identified themes across Program Areas. Each member of the evaluation team was assigned a Program Area, analyzing data from each data source and writing an analytic memo about it. As a team, we then engaged in meaning making across Program Areas to identify key themes.

All interviews were semi-structured; we followed the themes of our planned protocols and engaged in spontaneous dialogue as the conversations developed. During the interviews, one staff member conducted the interview while another took notes. A member of the interview team then created interview summaries, structured to align with the interview protocol and to capture any unexpected themes that emerged during the interview. The second member of the team checked these summaries against their own notes during our analysis to ensure alignment and accurate representation of the interview content.

We reviewed a sample of grant documentation, coding grant strategies and performance measures inductively. This enabled the team to identify initial grant strategies (typologies) and related codes. Once we had a set of codes, each member of the evaluation team categorized all available data for their respective Program Area grants using the initial codes. We modified the initial list of codes slightly in final review. Finally, we enumerated the types and numbers of impacts achieved where possible.

The evaluation team repeatedly engaged in meaning making to identify themes aligned with the Evaluation Questions. Each member of the evaluation team wrote an analytic memo for their Program Area for each data source. The evaluation team then engaged in cross-Program Area meaning making from those memos.

For the open-ended survey responses, which were collected last, we conducted a thematic analysis of the data starting with themes identified in earlier analysis. The survey items themselves were informed by the

earlier analysis and the responses both confirmed and extended earlier findings; the survey responses did not substantively contradict earlier findings.

Quotes from interviews and open-ended responses were sometimes edited for readability. When this occurred, a second member of the evaluation team reviewed to confirm that the original meaning was maintained.

## Data Limitations: Grant Documentation (Evaluation Questions 1 and 2)

The grant performance metrics and results provide important information about the COVID Relief Fund, but the metrics are also incomplete and inconsistent. These counts underrepresent the true reach of the COVID Relief Fund.

The availability of metrics and results varies by Program Area. In some areas, we have only a slight majority of results.

### *Environment*

We have results for a majority of the Environment grants (12 out of 17 grants or 71%):

- 5 grants are missing results; however, it appears they were later grants and may not yet be closed. Four additional “grants” were listed as contracts in the SmartSimple extract and therefore not included in our analysis.

### *Home Region*

We have results for a slight majority of the Home Region grants (23 out of 41 or 56%).

### *Education*

We have results for approximately 74% of the Education COVID grants:

- We have results for nearly all of the direct-to-school grants (95 out of 96 or 98%).
- We have results for a slight majority of the other 110 grants (58 out of 110 or 53%).
  - 24 of the 110 grants don’t appear in the SmartSimple extract; we have neither their metrics nor their results.
  - For an additional 28, no results information was available at the time of the extract.

Five additional “grants” were listed as contract in the SmartSimple extract and therefore not included in our analysis.

Moreover, even among the same type of grants within a given Program Area, impacts rarely aligned. For example, several grants reached people directly in either high- or low-touch ways, but the metrics themselves measured some other aspect of the grant (e.g., webinars produced, loans secured).

### **Data Limitations: Financial Sustainability (Evaluation Question 3)**

The perception of risk and security involves many factors and varies widely among people, even those facing the same circumstances. Also, nonprofit organizations feel pressure from donors in a range of ways, including not wanting to appear too weak or too strong, both of which may limit access to future funding. Nonprofits also feel pressure to avoid the appearance of organizational benefit for its own sake or to dedicate any portion of donor funds to indirect costs. All of these factors may have impacted how grantees characterized the relationship between their WFF COVID Relief Fund grant and their organizational sustainability and stability. For example, some grantees characterized grants such as for devices and hotspots as supporting their organization's financial sustainability while others characterized very similar grants as being passed on to families or schools and not impacting the grantee organization's own financial sustainability. This study was unable to explore these nuances in greater detail, but these nuances may be worthy of future investigation.

### **Data Limitations: Strategic Adjustments (Evaluation Question 5)**

The evaluation does not include the perspective of grantees who were not funded through the COVID Relief Fund grants. These include grantees funded under Strategy20, Strategy25, or both; grantees no longer funded by the Foundation; and those who were interested in the COVID Relief Fund but did not secure a grant under that Fund. These current and former grantees likely offer a differing perspective on the Foundation's COVID Relief Fund, particularly in connection to the Foundation's strategic adjustments; this is a potential blind spot of this evaluation.

### **Data Limitations: The Evaluation Team at Public Profit**

The evaluation team at Public Profit is an external team and brings an outside perspective to the evaluation of the Foundation's COVID Relief Fund. The evaluation team has limited line of sight on the internal practices of the Foundation or how current grantmaking may already be affected by the COVID Relief Fund grantmaking.

The evaluation team brings expertise in nonprofit management, K-12 education systems, place-based grantmaking, evaluation of philanthropic initiatives, and evaluation of COVID relief grantmaking in particular. The team is comprised of white women currently living in California. During interviews, some staff and/or grantees may have been more willing to share with us since we were external to the Foundation. Others may have been less willing to share honestly with us because of our visible identities, such as race, gender, or age. Regardless, the interview and survey feedback was filtered through our own interpretative lenses, which are a function of our lived experiences. We took several steps to mitigate these limitations, including explicit bias checks, multiple internal meaning making sessions, having at least two staff present at each interview, and secondary checks on the interpretation of open-ended survey responses.