



THE CENTER
FOR EFFECTIVE
PHILANTHROPY

Grantee Perception Report

Prepared for
Hartford Foundation for Public Giving
October 2017

Agenda

- Overview & Methodology
- Summary of Key Findings
- Recommendations from CEP
- Q&A and Discussion
- Closing Remarks

About CEP



Informative
Programming



Cutting-Edge
Research



Advisory
Services



Assessments

Grantee Perception Report

- › Comparative data & relevant benchmarking
 - › 50,000+ grantee responses from more than 250 funders, ranging from \$314,000 - \$34.6B in assets
 - › 37 Community Foundations
- › Rigorous methodology
- › Unrivaled understanding
- › Robust online reporting and analysis
- › Confidentiality that yields candor
- › Insight that leads to change

Survey Population

Survey	Survey Fielded	Number of Responses Received	Survey Response Rate
HFPG 2017	May/June 2017	175	68%
HFPG 2006	September/October 2006	180	69%

- › **4 Subgroups**
 - › Program Area
 - › Geographic Area
 - › Nonprofit Support Program Status
 - › Collaborative Grant Status

Custom Cohort

18 funders selected by HFPG

Custom Cohort

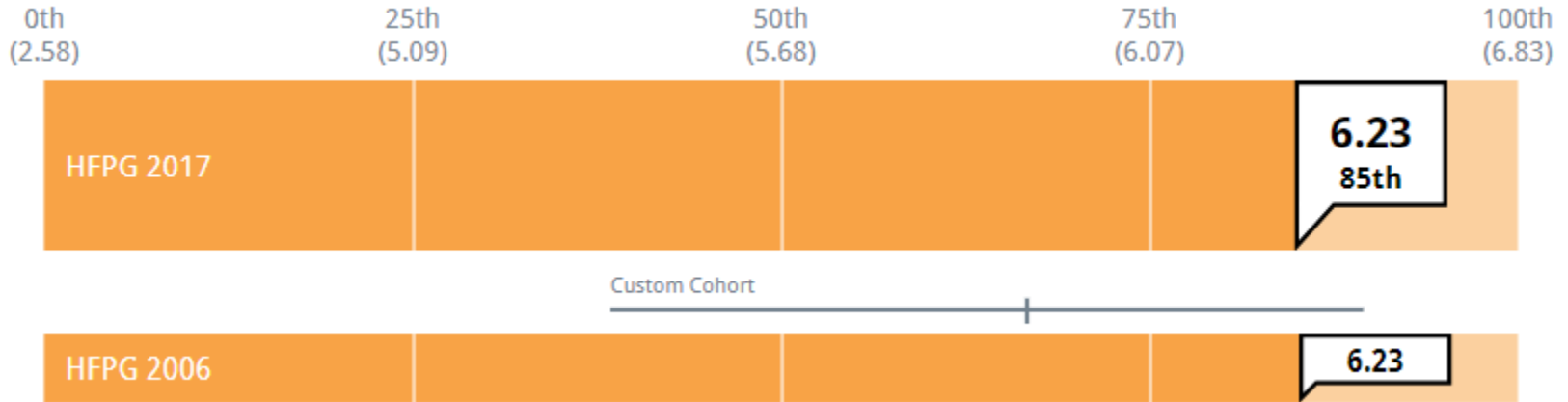
California Community Foundation	The Chicago Community Trust
Eugene and Agnes E. Meyer Foundation	The Cleveland Foundation
Hartford Foundation for Public Giving	The Community Foundation for Greater New Haven
Hawai'i Community Foundation	The Greater Cincinnati Foundation
Marin Community Foundation	The Minneapolis Foundation
New Hampshire Charitable Foundation	The Philadelphia Foundation
Rhode Island Foundation	The Pittsburgh Foundation
The Boston Foundation	The Saint Paul Foundation
The California Wellness Foundation	Weingart Foundation

Community Impact



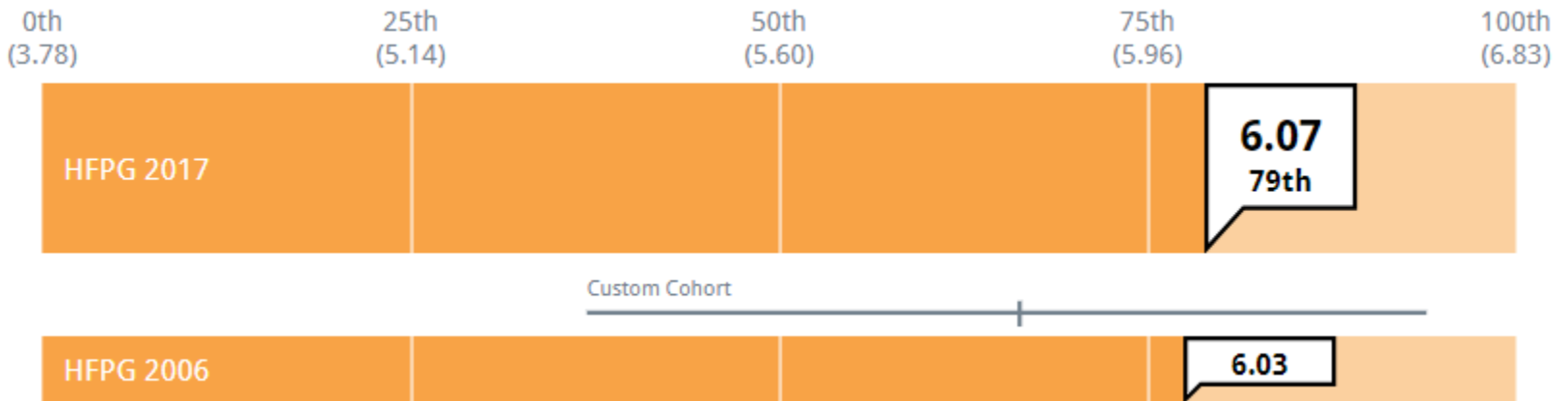
“Overall, how would you rate the Foundation’s impact on your local community?”

1 = No impact, 7 = Significant positive impact



“How well does the Foundation understand the local community in which you work?”

1 = Limited understanding of the community, 7 = Regarded as an expert on the community

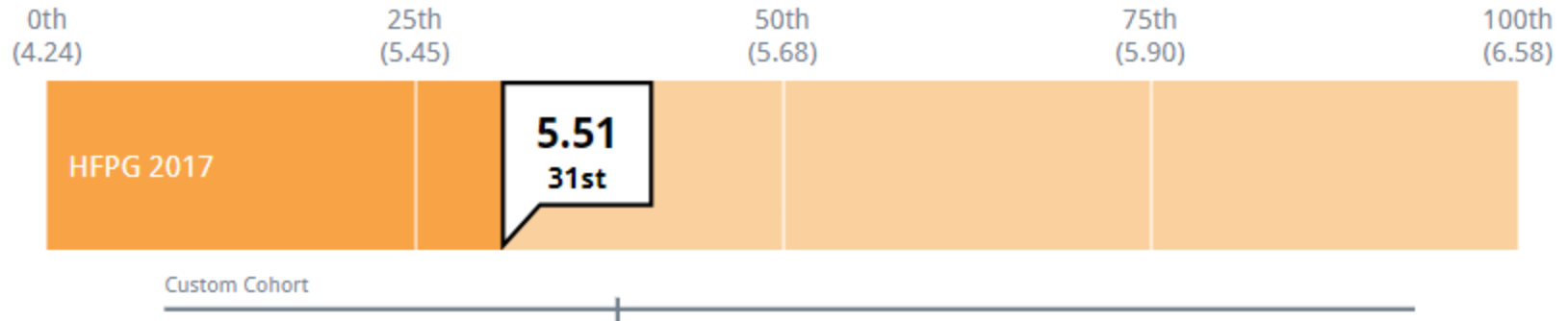


“*[HFPG] is now more in-tune with the community and with my organization than in the past.*”

“*The Foundation’s impact on the community is unrivaled in this region.*”

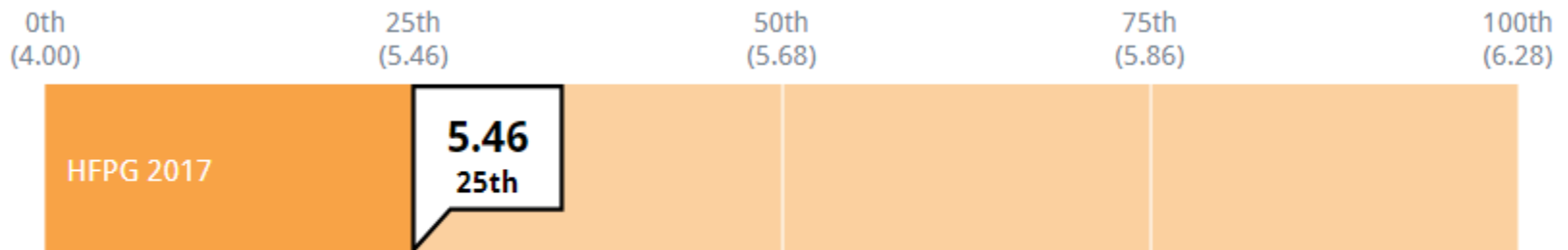
“How well does the Foundation understand the social, cultural, or socioeconomic factors that affect your work?”

1 = Limited Understanding, 7 = Thorough understanding



“How well does the Foundation understand your intended beneficiaries’ needs?”

1 = Limited understanding, 7 = Thorough understanding



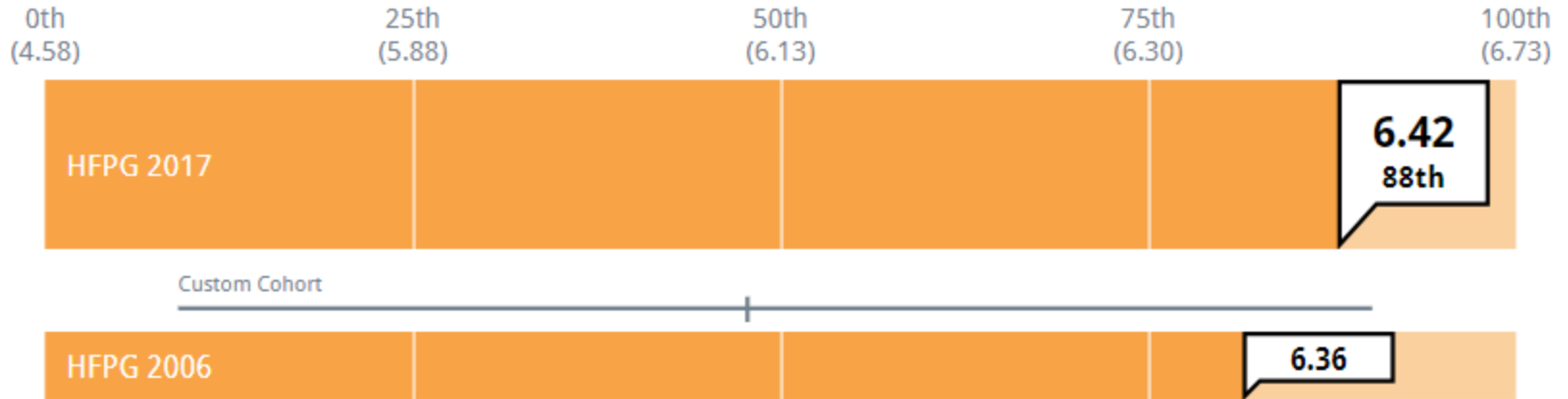
Impact on Grantee Organizations



“Overall, how would you rate the Foundation’s impact on your organization?”

1 = No impact

7 = Significant positive impact



95%

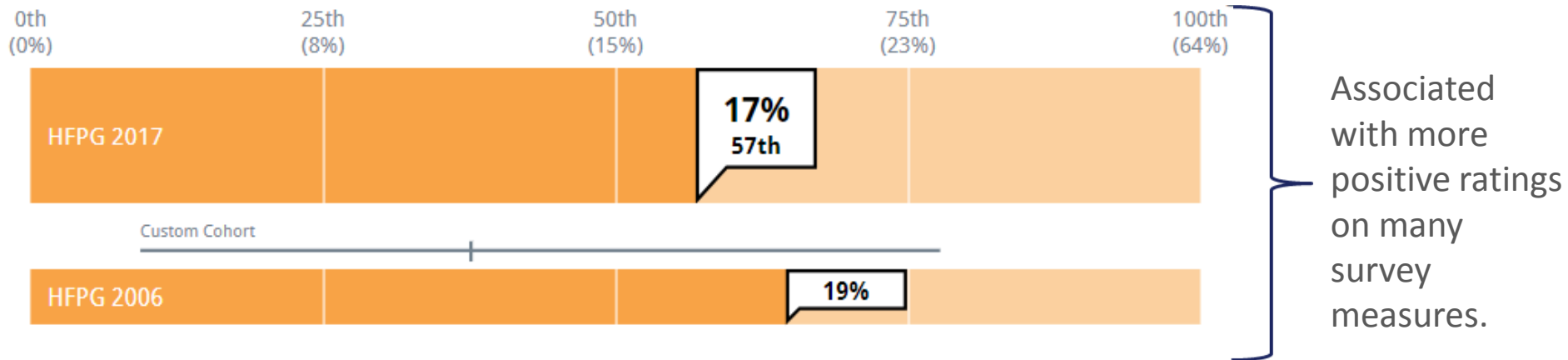
Of grantees indicating receipt of support from NSP rate that it had **positive impact on their organization**

“The Foundation could...spend more time...**learning first-hand** some of the **challenges non-profits face**, not just financial, but also structural and capacity-wise.”

“...They have **helped us to transform the organization** through their **funding, technical assistance, and ongoing trainings** offered through the Non-Profit Support program. Our **capacity has been tremendously impacted** by HFPG.”

Supports Beyond the Grant Check

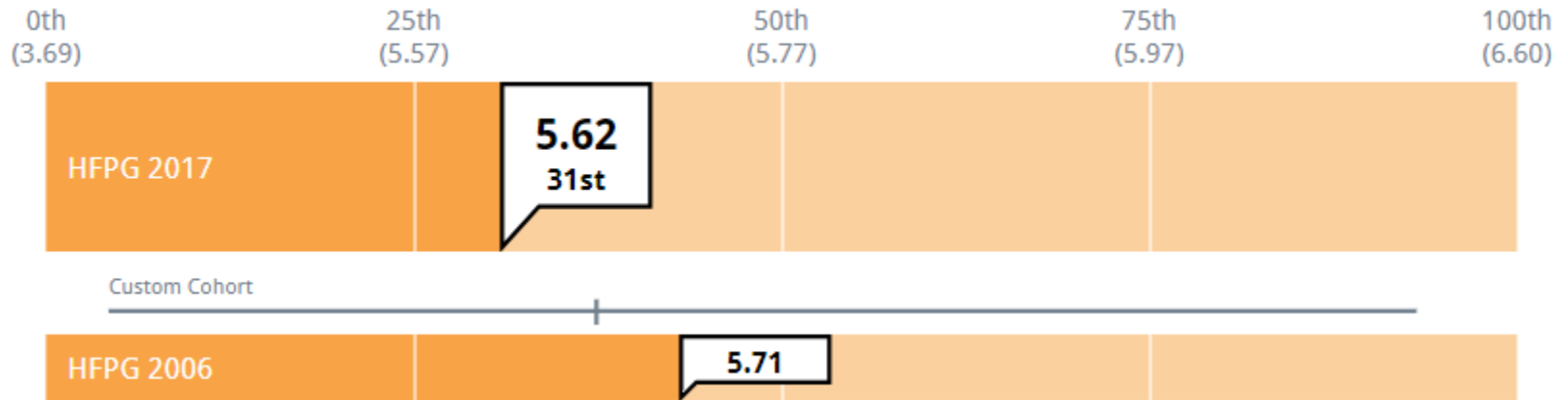
Proportion of Grantees Receiving Intensive Patterns of Nonmonetary Assistance



Grantees rate HFGP's roles as a convener and creator of collaborations of stakeholders as its most important roles to their organizations.

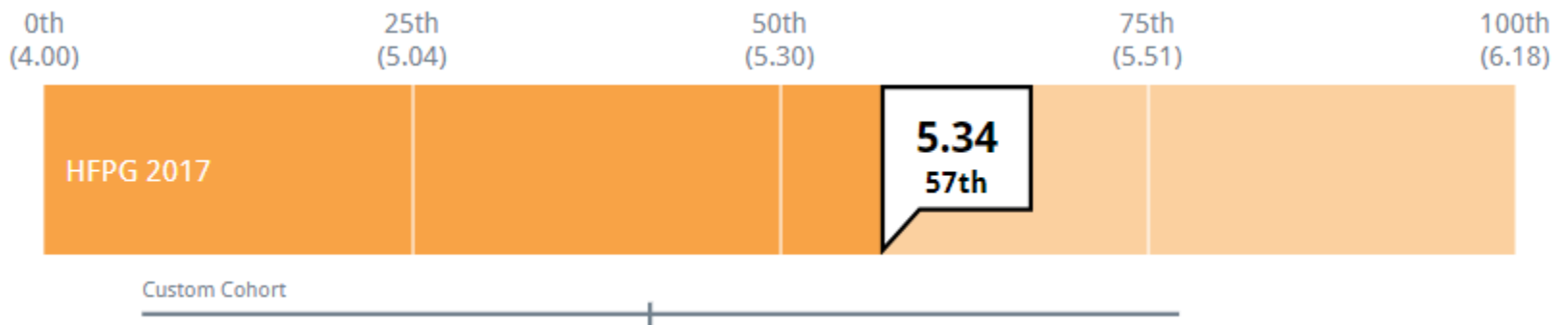
“How well does the Foundation understand your organization’s strategy and goals?”

1 = Limited Understanding, 7 = Thorough understanding



“How aware is the Foundation of the challenges that your organization is facing?”

1 = Not at all aware, 7 = Extremely aware



Grantmaking Patterns

	HFPG 2017	HFPG 2006	Typical Funder	Typical Custom Funder
Median Grant Size	\$120K	\$75K	\$84K	\$50K
Average Grant Length	3.0yrs	2.1yrs	2.1yrs	1.8yrs
Percent of grantees receiving general operating support	13%	6%	21%	32%
Percent of grantees receiving consistent funding	68%	N/A	53%	56%

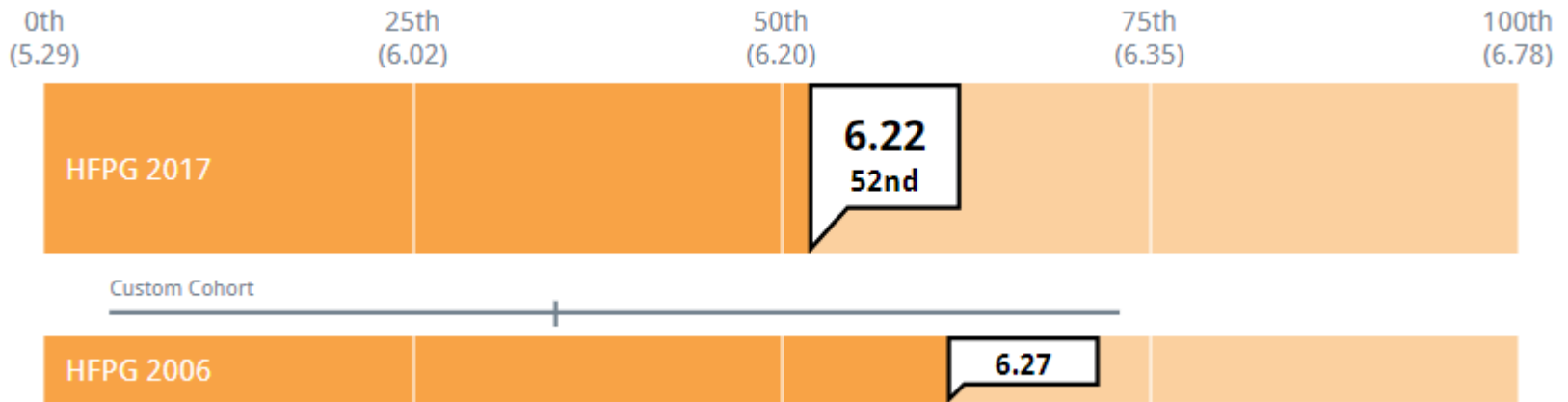
The **14%** of grantees reporting receipt of **long, large general operating/core support** grants provide **more positive ratings** than for HFPG's impact on their fields, organizations, and many other measures.

Funder-Grantee Relationships



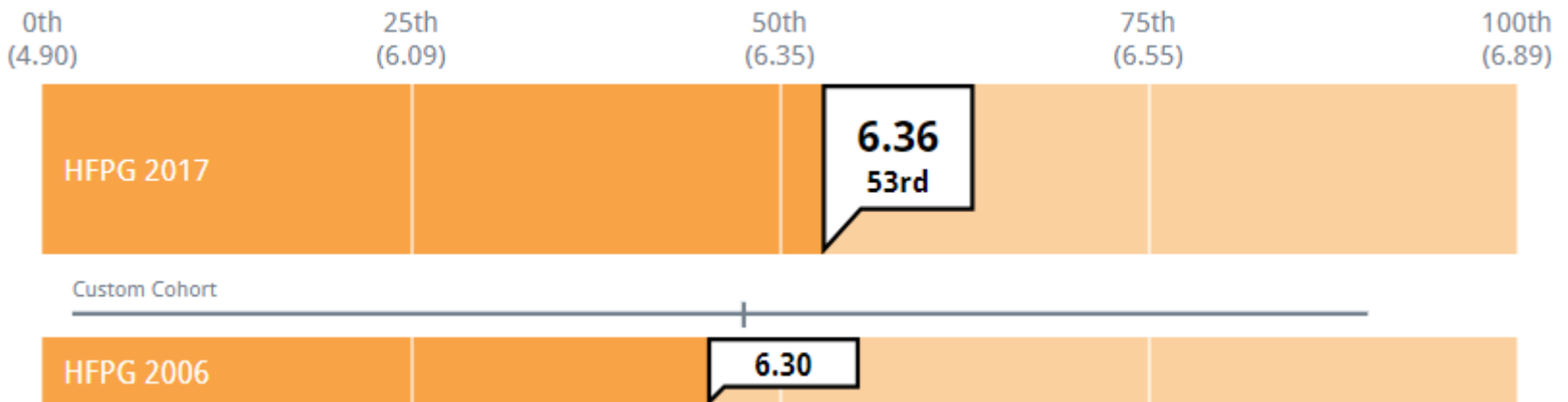
“How comfortable do you feel approaching the Foundation if a problem arises?”

1 = Not at all comfortable, 7 = Extremely comfortable



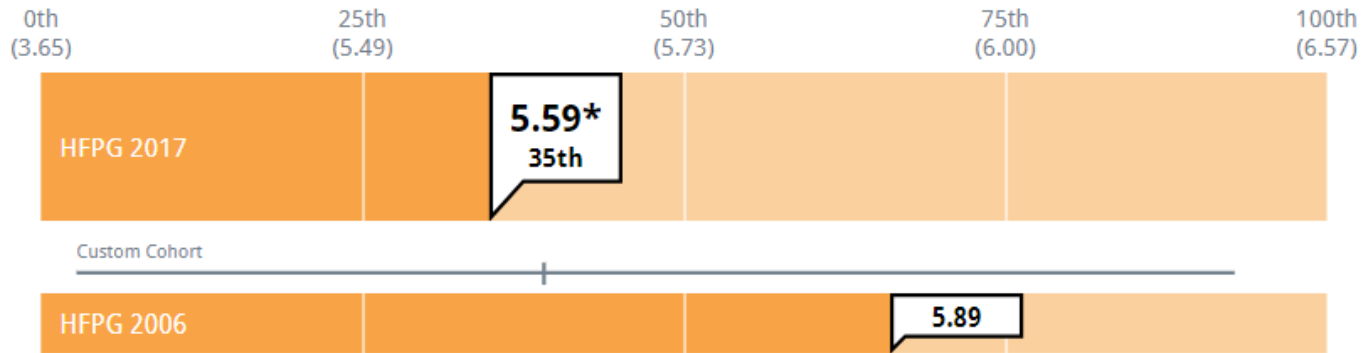
“Overall, how responsive was the Foundation staff?”

1 = Not at all responsive, 7 = Extremely responsive



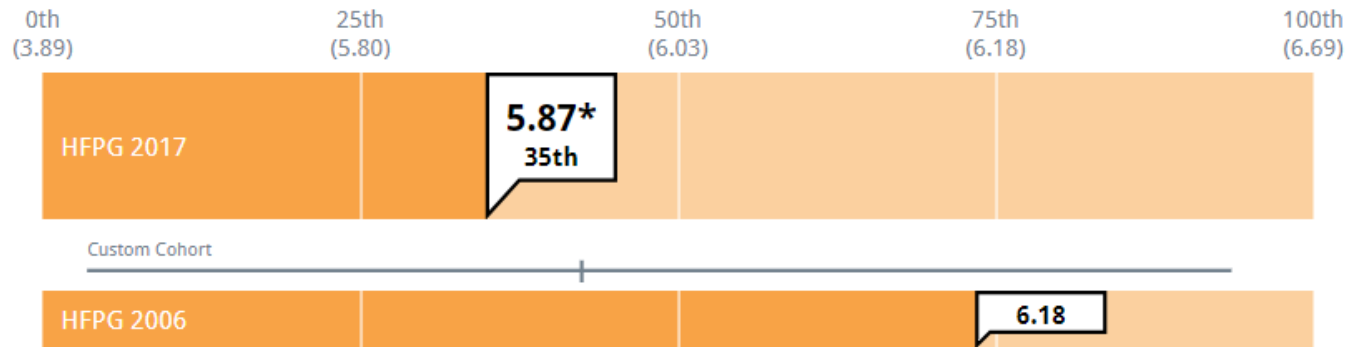
“How clearly has the Foundation communicated its goals and strategy to you?”

1 = Not at all clearly
7 = Extremely clearly



“How consistent was the information provided by different communications resources, both personal and written, that you used to learn about the Foundation?”

1 = Not at all consistent,
7 = Completely consistent



31% of grantees report that they were **not aware** that the Foundation implemented a **new strategic plan** in 2016.

“*[HFPG] should get **more feedback from grantees** [and hold] periodic meetings with non-profits to **understand the changing landscape** we operate in.”*

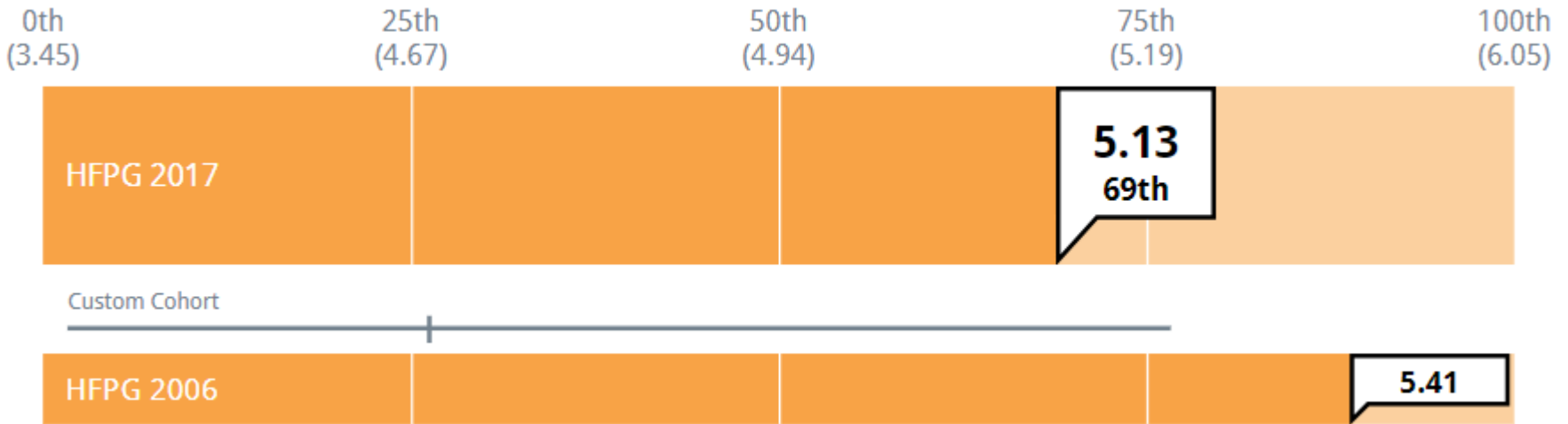
“*We enjoy a **productive and helpful relationship** with our Grant Manager.... I have been surprised, however, that there doesn't appear to be **regular communication or connection schedule** during the life cycle of the grant.”*

Processes



“How helpful was participating in the Foundation’s selection process in strengthening the organization/program funded by the grant?”

1 = Not at all helpful, 7 = Extremely helpful

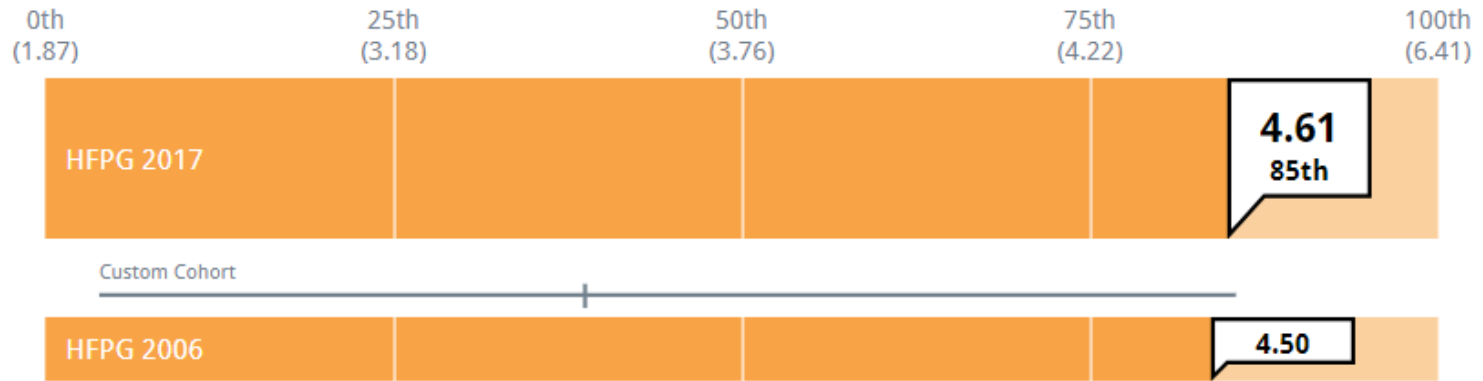


Time Spent on Selection Process

	HFPG 2017	HFPG 2006	Typical Funder	Typical Cohort Funder
Median Hours Spent on Proposal and Selection Process	25hrs	20hrs	20hrs	20hrs

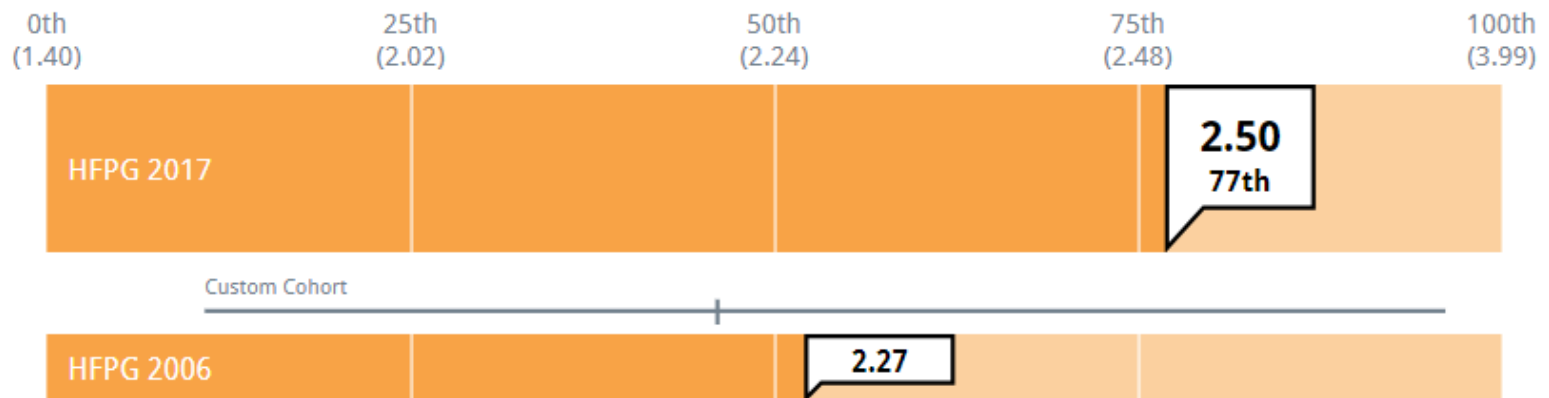
“How involved was the Foundation staff in the development of your proposal?”

1 = No involvement, 7 = Substantial involvement



“As you developed your grant proposal, how much pressure did you feel to modify your organization’s priorities in order to create a grant proposal that was likely to receive funding?”

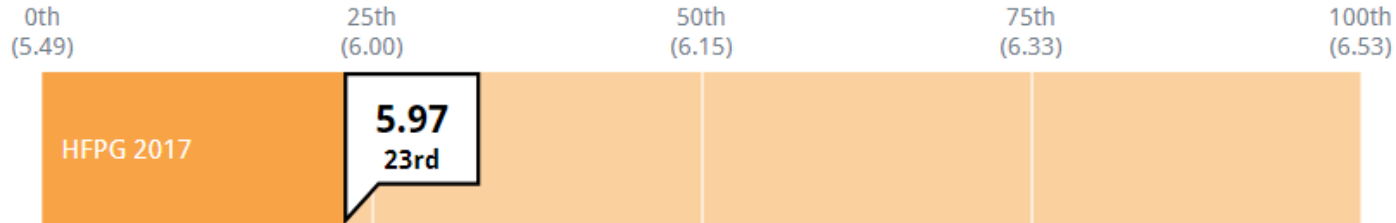
1 = No pressure, 7 = Significant pressure



“To what extent was the Foundation’s reporting process...”

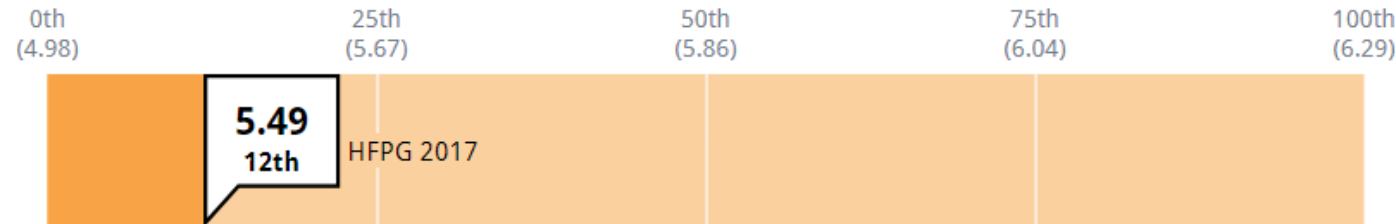
“...straightforward?”

1 = Not at all
7 = To a great extent



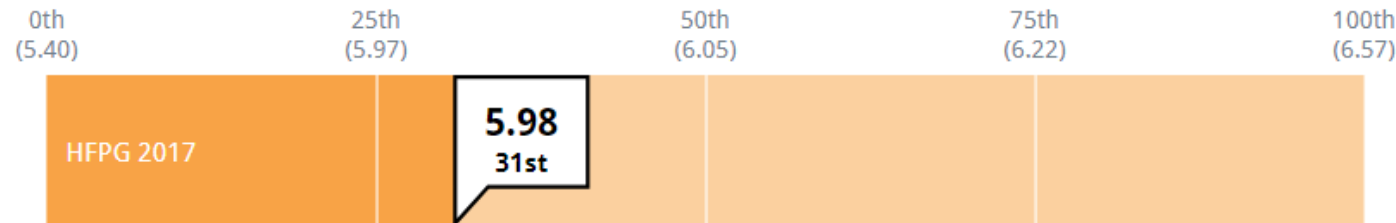
“...adaptable, if necessary, to fit your circumstances?”

1 = Not at all
7 = To a great extent



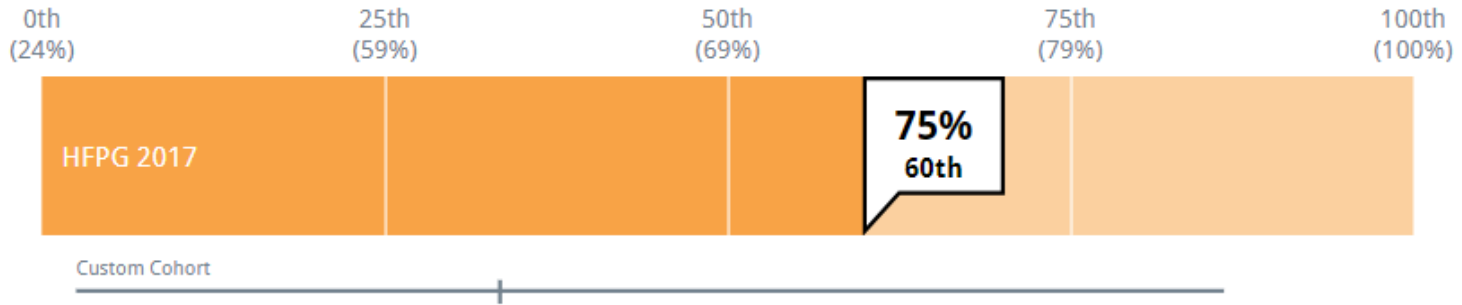
“...relevant, with questions and measures pertinent to the work funded by this grant?”

1 = Not at all
7 = To a great extent



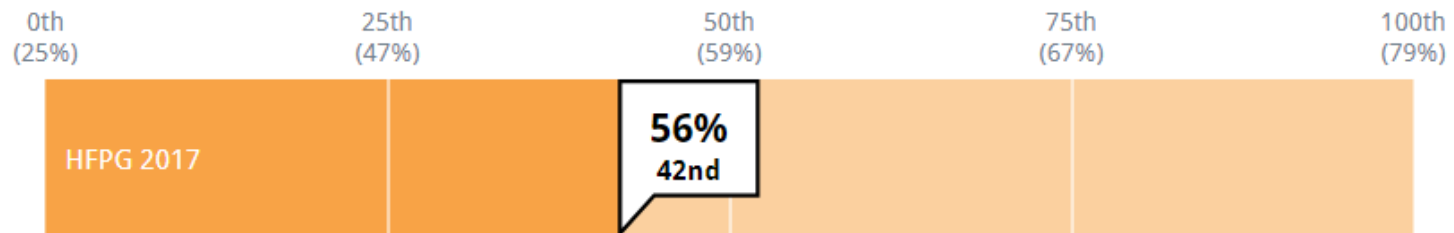
“At any point during the application or the grant period, did the Foundation and your organization exchange ideas regarding how your organization would assess the results of the work funded by this grant?”

Proportion of grantees responding ‘Yes’



“At any point have you had a substantive discussion with the Foundation about the report(s) you or your colleagues submitted as a part of the reporting process?”

Proportion of grantees responding ‘Yes’



These touchpoints are associated with **more positive perceptions** on many survey measures.

Recommendations



Recommendations from CEP

- › Building on HFPG's continued positive perceptions of impact, **explore and codify** practices undergirding understanding and impact in the local community.
- › More **consistent communication**, and **clear, frequent articulation of HFPG's strategy** – how it has changed from the past and implications for the future.
- › Work with staff to develop **clear and concrete expectations** for the **quality and quantity of interactions** between staff and grantees.
- › **Deepen & demonstrate understanding** of beneficiaries, grantees' contexts and the goals and challenges of grantee organizations.
- › Consider **providing** more of the **Foundation's most aligned grantees** with **grant characteristics associated with greater impact** (e.g., general operating support, supports beyond the grant check, consistent funding support).
- › Consider opportunities to **streamline the processes** and assess ways to **minimize the pressure grantees feel to modify** their proposals in order to receive funding from the Foundation.



CEP's Working Definition of Foundation Effectiveness

Foundations can take on pressing challenges that other actors in society cannot, or will not. They are entrusted by the public to utilize tax-privileged funds that are intended to benefit society.

Given this unique opportunity, foundations have a moral imperative to maximize their effectiveness. Though foundations' missions vary dramatically, **CEP believes that foundation effectiveness – and impact – requires these mutually reinforcing elements:**

- › Clear goals,
- › Coherent strategies to achieve goals,
- › Disciplined implementation of those strategies, and,
- › Relevant performance indicators to assess progress.