

Grantee Perception Report®

prepared for

Rockefeller Brothers Fund

Spring 2010



THE CENTER FOR
EFFECTIVE PHILANTHROPY

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Executive Summary – Key Findings

The Rockefeller Brothers Fund (“RBF”) receives positive ratings throughout the report and is rated above or similarly to the median funder in our dataset on many measures. In particular the Foundation receives high ratings for its impact on and understanding of grantees’ fields and organizations, a substantial improvement since a similar survey in 2004. One grantee comments that, “RBF is a role model for other private foundations, both in terms of the clarity and integrity of their funding processes, and their mission and commitment to creating meaningful, long-lasting change that promotes and respects diversity and cultural understanding worldwide.”

The Fund receives positive ratings for its impact on and understanding of its grantees’ fields and organizations. Compared to its 2004 GPR, the Fund receives significantly higher ratings from its grantees for its impact on their fields. The Fund is rated more positively than 75 percent of funders in our dataset for its understanding of grantees’ fields, its ability to advance knowledge in their fields and its effect on public policy. Grantees make comments like, “Foundation staff are regarded as experts/leaders in our field.... [Our contacts] both possess the ability to lead and encourage collaboration that results in significant progress to our collective goals.... Without this Foundation's involvement there would be a great void and absence of critical leadership.” The RBF is also rated positively for its impact on and understanding of grantees’ organizations. Grantees comment that, “RBF has helped us grow our organization and further our mission.”

RBF is rated less positively than typical for the clarity of its communication of its goals and strategy as well as for the consistency of its communication resources – both personal and written. Grantees comment that communication from the RBF and its staff is sometimes “unclear” and “inconsistent.” The RBF’s grantees rate written communication resources such as published funding guidelines and the website as less helpful than typical. A frequent area of suggestion from grantees is improvement in the clarity of communication, for example, “consistency between practice and website.”

Provision of comprehensive and field-focused patterns of non-monetary assistance is viewed as helpful and effective by grantees, but the RBF also provides some grantees with sporadic assistance in ways that are not associated with more positive grantee experiences. The Foundation offers a larger than typical proportion of its grantees more concentrated patterns of non-monetary assistance. Grantees receiving these concentrated amounts of non-monetary assistance rate significantly higher on many measures in the report, including overall satisfaction and impact on their organizations. Across program areas there is variation in the provision of this nonmonetary assistance. When asked to provide suggestions on how the Foundation could improve, about 18 percent of suggestions reference the provision of non-monetary assistance or assistance securing funding from other sources. In particular, grantees seek more “meetings among grantees who are working on similar projects” and increased assistance securing funding from other sources.

The administrative processes associated with grant funding are seen as helpful as typical in strengthening grantees’ organizations but experiences are inconsistent across RBF programs. Grantees who indicate more staff involvement in the process, either in developing their proposal or in discussing completed evaluations, rate higher for the helpfulness of the administrative process. Time spent completing the administrative processes over the lifetime of the grant varies across program areas, as does the number of dollars awarded per administrative hour completed by grantee.

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Background

- ♦ Since February 2003, the Center for Effective Philanthropy (CEP) has conducted surveys of grantees on their perceptions of their philanthropic funders both on behalf of individual funders and independently. The purpose of these surveys is two-fold: to gather data that is useful to individual funders and to form the basis for broadly applicable research reports.¹
- ♦ **The Grantee Perception Report® (GPR) shows an individual philanthropic funder its grantee perceptions relative to a set of perceptions of other funders whose grantees were surveyed by CEP.**
 - Assessing funder performance is challenging and a range of data sources is required. The GPR provides one set of perspectives that can be useful in understanding philanthropic funder performance.
 - It is important to note that, on most questions, grantee ratings cluster toward the high end of an absolute scale. Grantee perceptions must be interpreted in light of the particular strategy of the funder.
 - The survey covers many areas in which grantees' perceptions might be useful to a philanthropic funder. Each funder should place emphasis on the areas covered according to the funder's specific priorities.
 - Low ratings in an area that is not core to a philanthropic funder's strategy may not be concerning. For example, a funder that does not focus efforts on public policy would likely receive lower than average ratings in this area if it is adhering to its strategy.
 - Finally, across most measures in this report, structural characteristics – such as funder type, asset size, focus, and age – are not strong predictors of grantee perceptions, suggesting that it is possible for all funders to attain high ratings from grantees.

Methodology – The Fund’s Grantee Survey

- ♦ The Center for Effective Philanthropy (CEP) surveyed the grantees of Rockefeller Brothers Fund (“RBF”) during February and March 2010. CEP has surveyed RBF’s grantees in the past. Where possible, ratings from these surveys are also shown in the report. The details of RBF’s surveys are as follows:

Survey	Survey Period	Fiscal Year of Surveyed Grantees	Number of Grantees Surveyed	Number of Responses Received	Survey Response Rate ¹
RBF 2010	February and March 2010	2009	357	236	66%
RBF 2004	September and October 2004	2003	303	195	64%

- ♦ Selected grantee comments are also shown throughout this report. This selection of comments highlights major themes and reflects trends in the data. These selected comments over-represent negative comments about the Fund in order to offer a wide range of perspectives.

Methodology – Comparative Data

- ♦ RBF's average and/or median grantee ratings are compared to the average and/or median ratings from grantees in CEP's dataset, which contains data collected over the last six years. Please see Appendix B for a list of all funders whose grantees CEP has surveyed.

Full Comparative Set	
Grantee Responses	36,864 grantees
Philanthropic Funders	251 funders

- ♦ RBF is also compared to 12 funders selected by the Foundation. The 12 funders that comprise this group are:

Cohort Funders	
The Atlantic Philanthropies	The Ford Foundation
Carnegie Corporation of New York	John D. and Catherine T. MacArthur Foundation
Charles Stewart Mott Foundation	The Rockefeller Foundation
The David and Lucile Packard Foundation	Rockefeller Brothers Fund
Doris Duke Charitable Foundation	Surdna Foundation, Inc.
The Energy Foundation	The William and Flora Hewlett Foundation

Grantmaking Characteristics

- ♦ This table is intended to provide context to the Foundation in thinking about its GPR results relative to its grantmaking practices. The information is based on self-reported data from grantees about the size, duration, and types of grants that they received.
- ♦ Compared to the typical funder, RBF tends to provide larger and shorter term grants. The Foundation also tends to provide a larger than typical proportion of its grantees with operating support.

Survey Item	RBF 2010	RBF 2004	Full Dataset Median	Cohort Funder Median
Grant Size				
Median grant size	\$100 K	\$80 K	\$60 K	\$200 K
Grant Length				
Average grant length	1.9 years	2.4 years	2.1 years	2.4 years
Percent of grantees receiving multi-year grants	56%	71%	49%	71%
Type of Support				
Percent of grantees receiving operating support	26%	N/A	19%	18%
Percent of grantees receiving program/project support	61%	N/A	65%	71%
Percent of grantees receiving other types of support	13%	N/A	16%	11%

Note: CEP research indicates that grant size, type, or length alone are not key predictors of impact on grantee's organizations. For the full range of data on these survey items refer to part B of the Appendix. RBF 2004 data on "type of support" is not available due to changes to the survey instrument.

Structural Characteristics of Grantees

- This table is intended to provide context to the Foundation in thinking about its GPR results relative to the demographic makeup of its grantees. The information is based on self-reported data from grantees about the characteristics of their organizations.
- Compared to grantees of the typical funder, RBF grantees tend to be less established organizations.

Survey Item	RBF 2010	RBF 2004	Full Dataset Median	Cohort Funder Median
Budget of Funded Organizations				
Typical organizational budget	\$1.5MM	\$1.2MM	\$1.4MM	\$2.0MM
Duration of Funded Program and Grantee Organization				
Programs conducted 6 years or more ¹	30%	N/A	33%	31%
Median length of establishment of grantee organizations	16 years	15 years	24 years	22 years
First-Time Grantees²				
Percentage of first-time grants	29%	N/A	34%	N/A

1: Represents data from 87 funders.

2: Represents data from 16 funders.

Note: In most cases, the structural characteristics of grantees are not strong predictors of how grantees perceive funders, suggesting that it is possible for funders with even a unique set of grantees to attain high ratings. For additional information on grantee characteristics related to these survey items refer to part B of the Appendix. RBF 2004 data on "programs conducted 6 years or more" not available due to changes in the survey instrument. RBF 2004 and Cohort Funder data on "first-time grantees" not available due to changes in the survey instrument.

Structural Characteristics of Funders

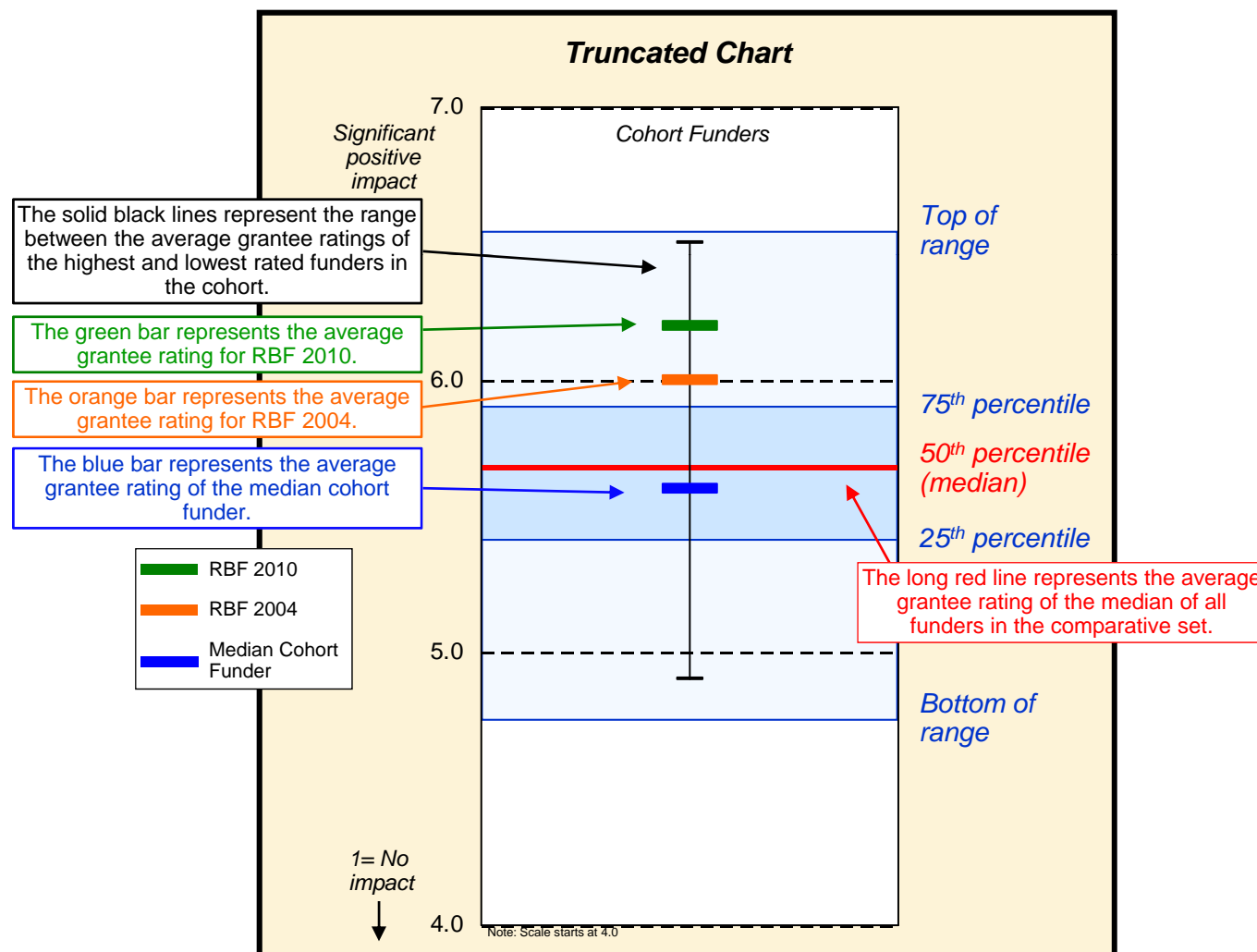
- ♦ This table is intended to provide context to the Foundation in thinking about its GPR results relative to its grantmaking and staffing. This information is based on IRS filings and data supplied by philanthropic funders that have subscribed to the GPR.
- ♦ The number of grants processed and managed per professional program staff full-time employee at RBF is larger than that of the typical funder and larger than that of the median cohort funder.

Survey Item	RBF 2010	RBF 2004	Full Dataset Median	Cohort Funder Median
Program Staff Load				
Dollars awarded per professional program staff full-time employee	\$3.9MM	\$2.6MM	\$3.6MM	\$4.2MM
Grants awarded per professional program full-time employee	39 grants	35 grants	30 grants	19 grants
Active grants per professional program full-time employee	56 grants	62 grants	50 grants	49 grants

Note: Funders of different sizes and focuses choose to structure their organizations differently – so, as with all the information contained in this report, the Fund should interpret data in this section in light of its distinctive goals and strategy. For additional information on funder characteristics related to these survey items, please refer to part B of the Appendix.

Reading GPR Charts

Much of the grantee perception data in the GPR is presented in the format below. These graphs show the average of grantee responses for RBF, over a background that shows percentiles for the average ratings for the full comparative set of 251 philanthropic funders. **Throughout the report, many charts in this format are truncated from the full scale because funder averages fall within the top half of the absolute range.**



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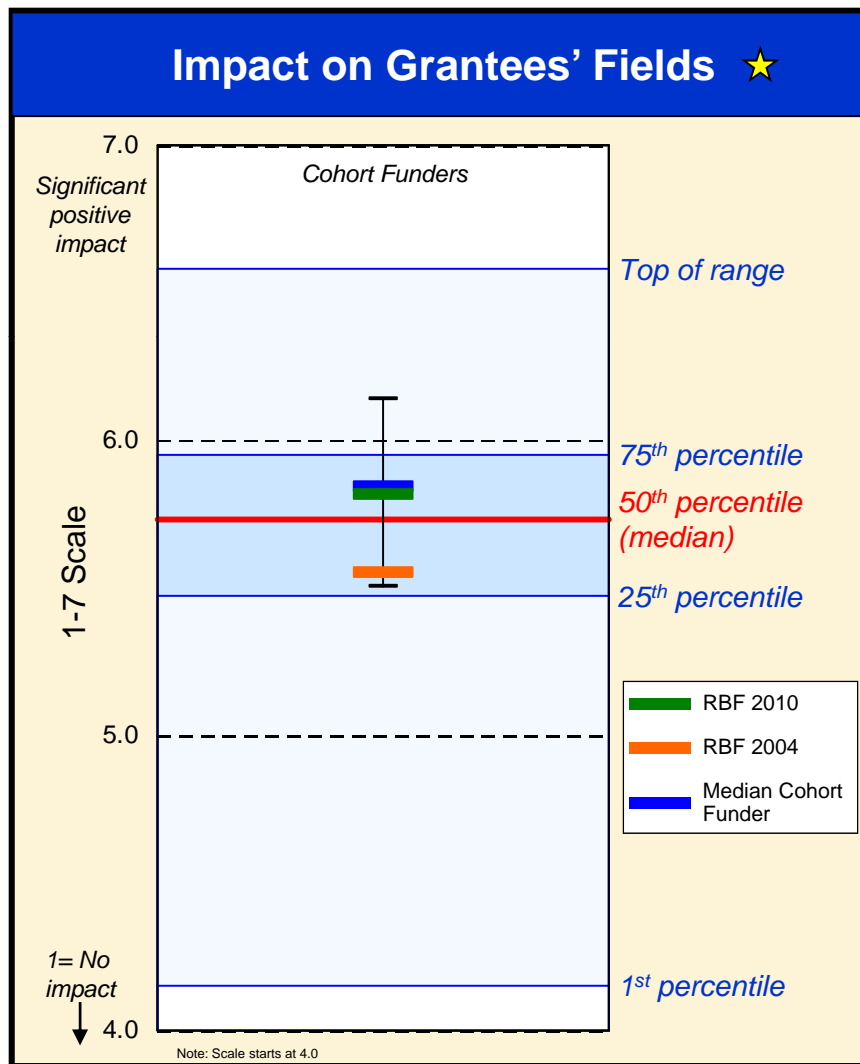
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Impact on Grantees' Fields

On impact on grantees' fields, RBF is rated:

- similarly to the median funder
- similarly to the median cohort funder



Selected Grantee Comments

- ♦ “Rockefeller Brothers Fund is recognized as a leader in the fields of youth and leadership development. They support important and innovative programs, and facilitate the sharing of lessons and best practices throughout the field.”
- ♦ “...it is important that RBF as a whole further assess how it could contribute more on the work to tackle impacts and implications at [the] international level of the unfolding financial and economic crises.”
- ♦ “RBF is a leading funder of climate change policy (renewable energy, energy efficiency, climate solutions, etc.). RBF is not as large as others but is more focused and more collaborative in getting change.”
- ♦ “I don’t think of the Foundation as being a leader in the field in which we operate but I do see it as a leader in other areas of funding.”
- ♦ “The... program is betting on winners and brand names rather than supporting innovation. It is too easily seduced by glossy reports and organization reputation and does not see impacts clearly.”

Note: This question includes a “don’t know” response option; 6 percent of RBF 2010 respondents answered “don’t know”, compared to 9 percent at the median funder, 14 percent of RBF 2004 respondents, and 4 percent of respondents at the median cohort funder. Chart does not show data from one funder whose field impact rating is less than 4.0.

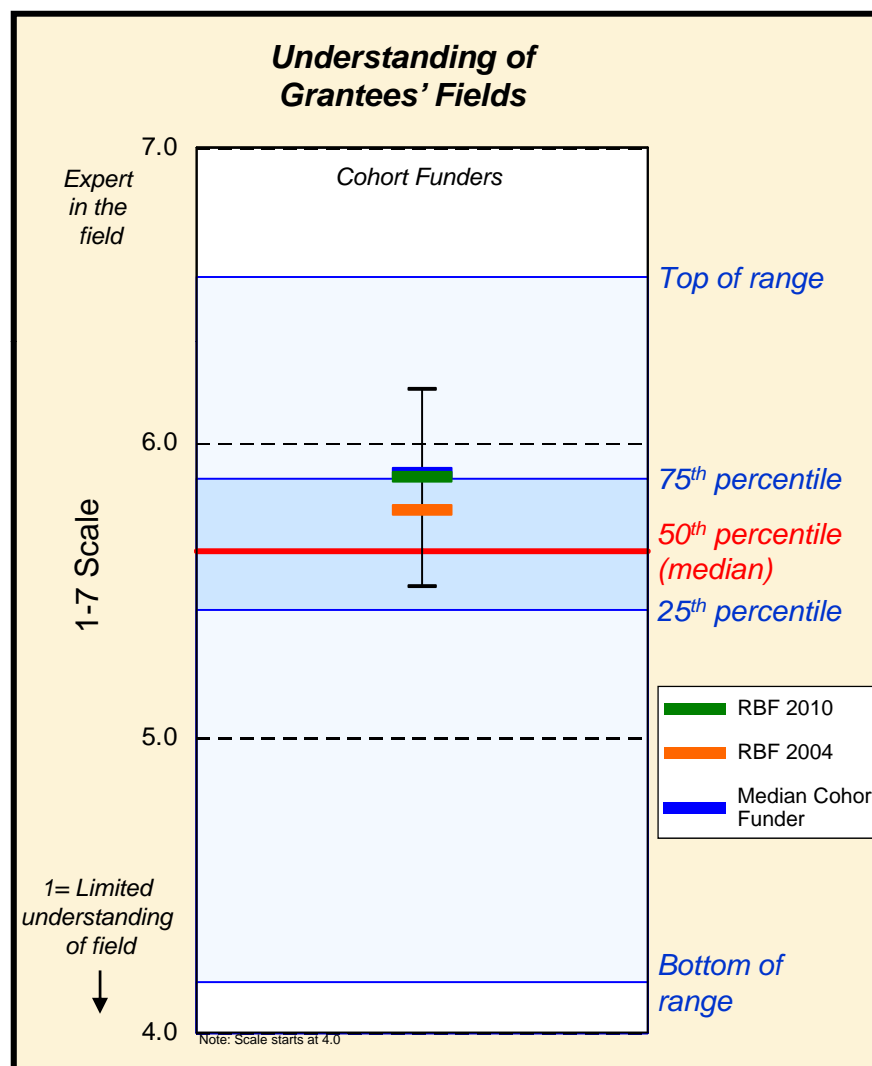
★ = RBF 2010 rating is significantly higher than RBF 2004 rating at a 90% confidence level.

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Understanding of Grantees' Fields

On understanding of grantees' fields, RBF is rated:

- above the median funder
- similarly to the median cohort funder



Note: This question includes a "don't know" response option; 6 percent of RBF 2010 respondents answered "don't know", compared to 7 percent at the median funder, 7 percent of RBF 2004 respondents, and 3 percent of respondents at the median cohort funder.

Advancing Knowledge in Fields and Effect on Public Policy

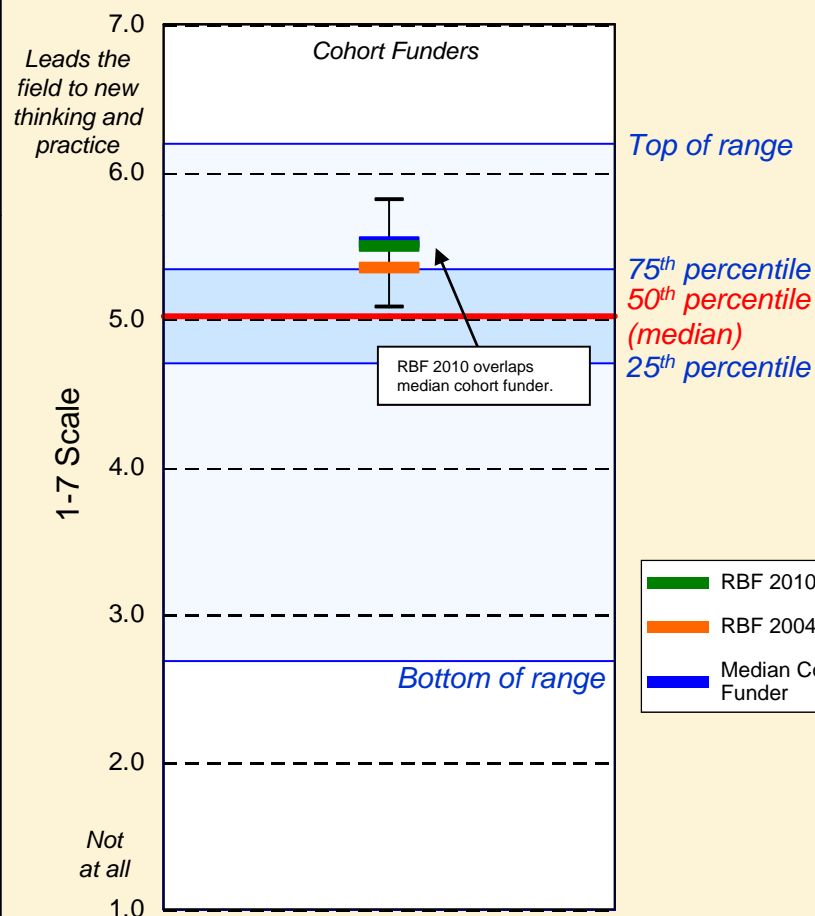
On advancement of knowledge in grantees' fields, RBF is rated:

- above the median funder
- similarly to the median cohort funder

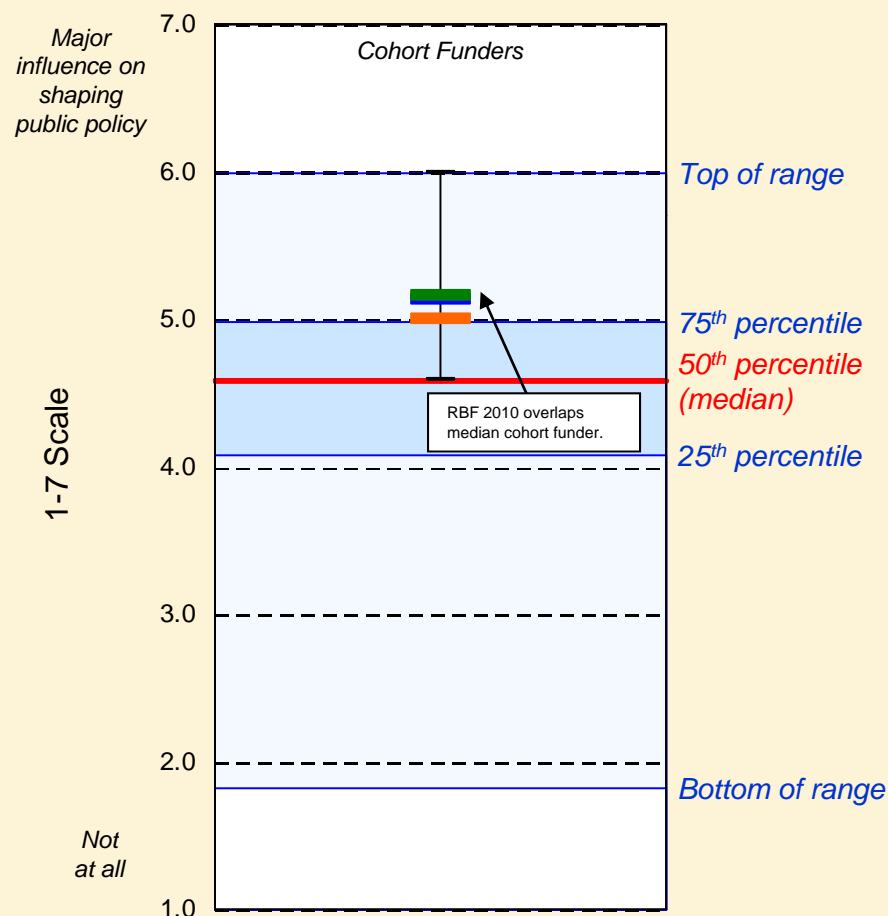
On effect on public policy in grantees' fields, RBF is rated:

- above the median funder
- similarly to the median cohort funder

Advancing Knowledge in the Field



Funder's Effect on Public Policy in Grantees' Fields

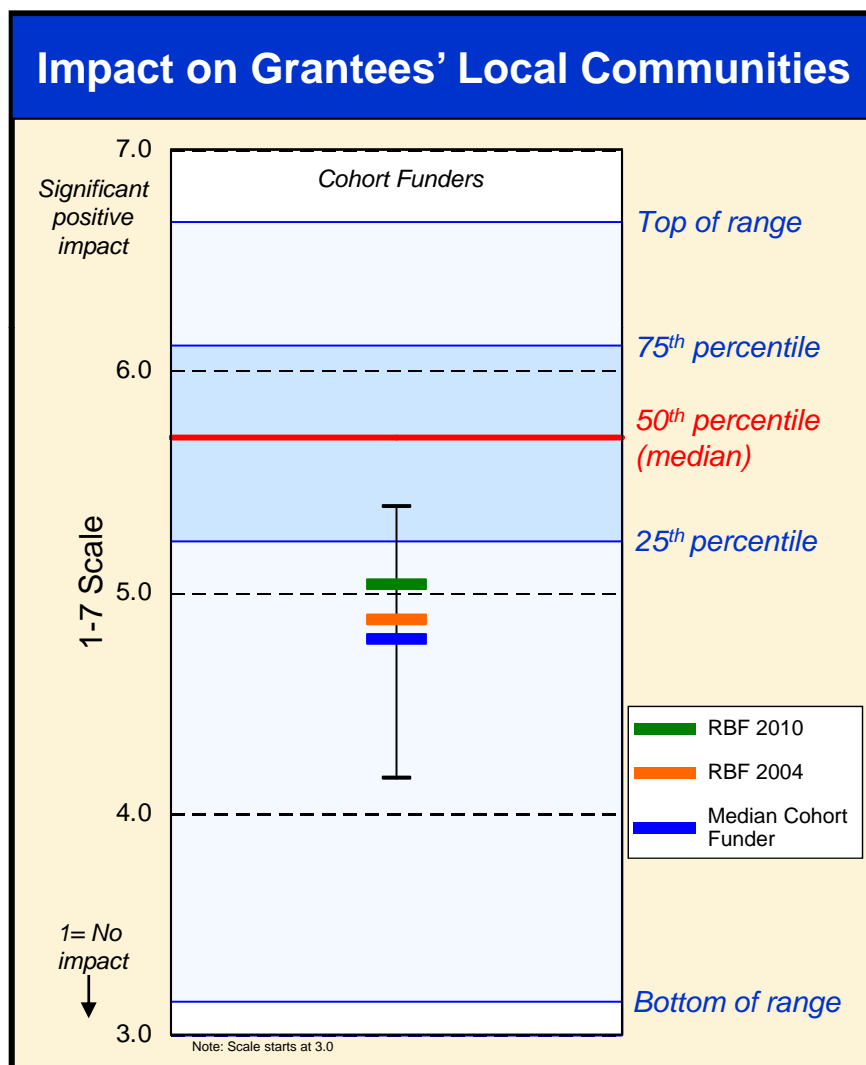


Note: The questions depicted on these charts include a "don't know" response option. In the left-hand chart, 22 percent of RBF 2010 respondents answered "don't know", compared to 25 percent at the median funder, 27 percent of RBF 2004 respondents, and 10 percent of respondents at the median cohort funder. In the right-hand chart, 30 percent of RBF 2010 respondents answered "don't know", compared to 41 percent at the median funder, 37 percent of RBF 2004 respondents, and 20 percent of respondents at the median cohort funder.

Impact on Grantees' Local Communities

On impact on grantees' local communities, RBF is rated:

- below the median funder
- above the median cohort funder



Selected Grantee Comments

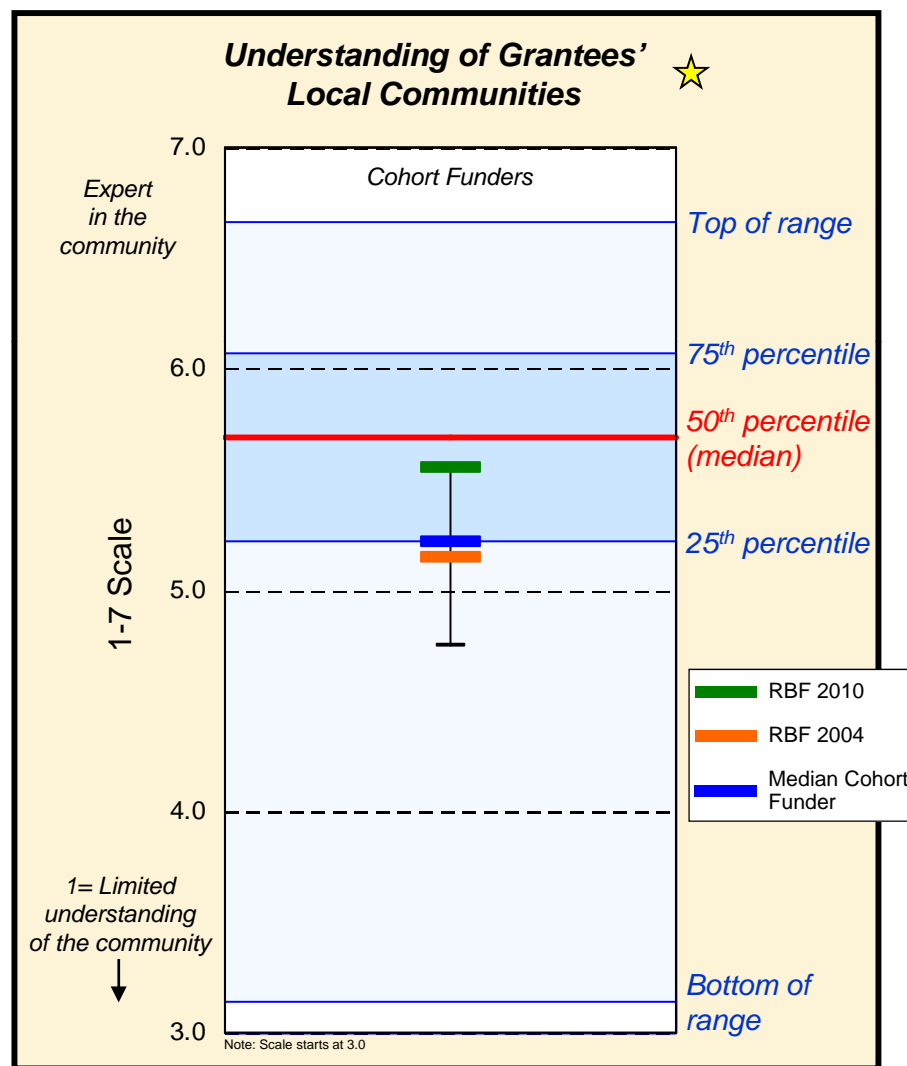
- ♦ “RBF opened delicate issues with Serbian Government and this helped us to establish the dialogue with state representatives.”
- ♦ “Focusing on NYC organizations, especially small to mid-sized organizations, is so important and is having a huge impact.”
- ♦ “RBF has been remarkable in identifying and supporting nascent grassroots organizations all over China. [Our program officer] has good vision and insight and has been able to leverage her knowledge and support effectively.”
- ♦ “RBF is, to my knowledge, the only donor agency in Kosovo that really understands the corrupting influence that philanthropy can have if conducted without a keen sensitivity to the needs and aspirations of local communities in Kosovo. They always place the needs of the community ahead of their own needs, and they are extremely flexible in terms of the kind of projects and support they offer.”

Note: This question includes a “don’t know” response option; 39 percent of RBF 2010 respondents answered “don’t know”, compared to 11 percent at the median funder, 34 percent of RBF 2004 respondents, and 29 percent of respondents at the median cohort funder.

Understanding of Grantees' Local Communities

On understanding of grantees' local communities, RBF is rated:

- similarly to the median funder
- higher than all other cohort funders



Note: This question includes a "don't know/not applicable" response option; 33 percent of RBF 2010 respondents answered "don't know/not applicable", compared to 13 percent at the median funder, 29 percent of RBF 2004 respondents, and 30 percent of respondents at the median cohort funder.

★ = RBF 2010 rating is significantly higher than RBF 2004 rating at a 90% confidence level.

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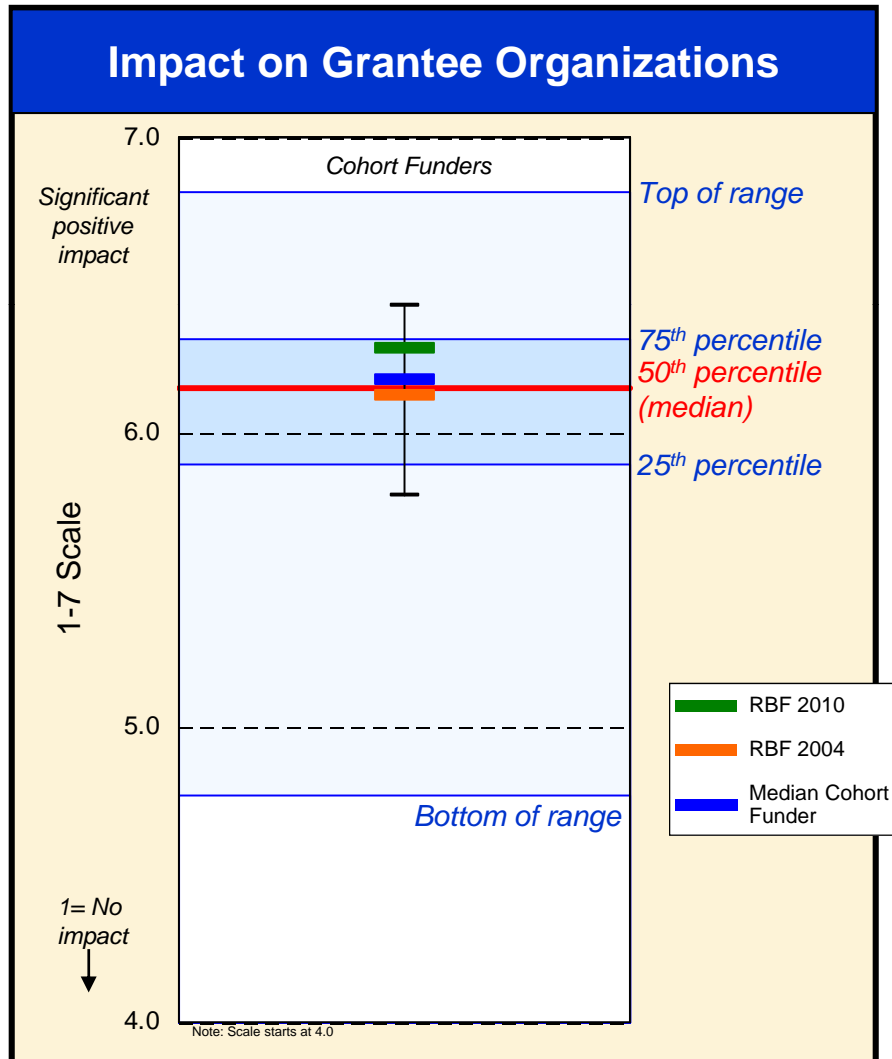
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Impact on Grantee Organizations

On impact on grantee organizations, RBF is rated:

- above the median funder
- above the median cohort funder



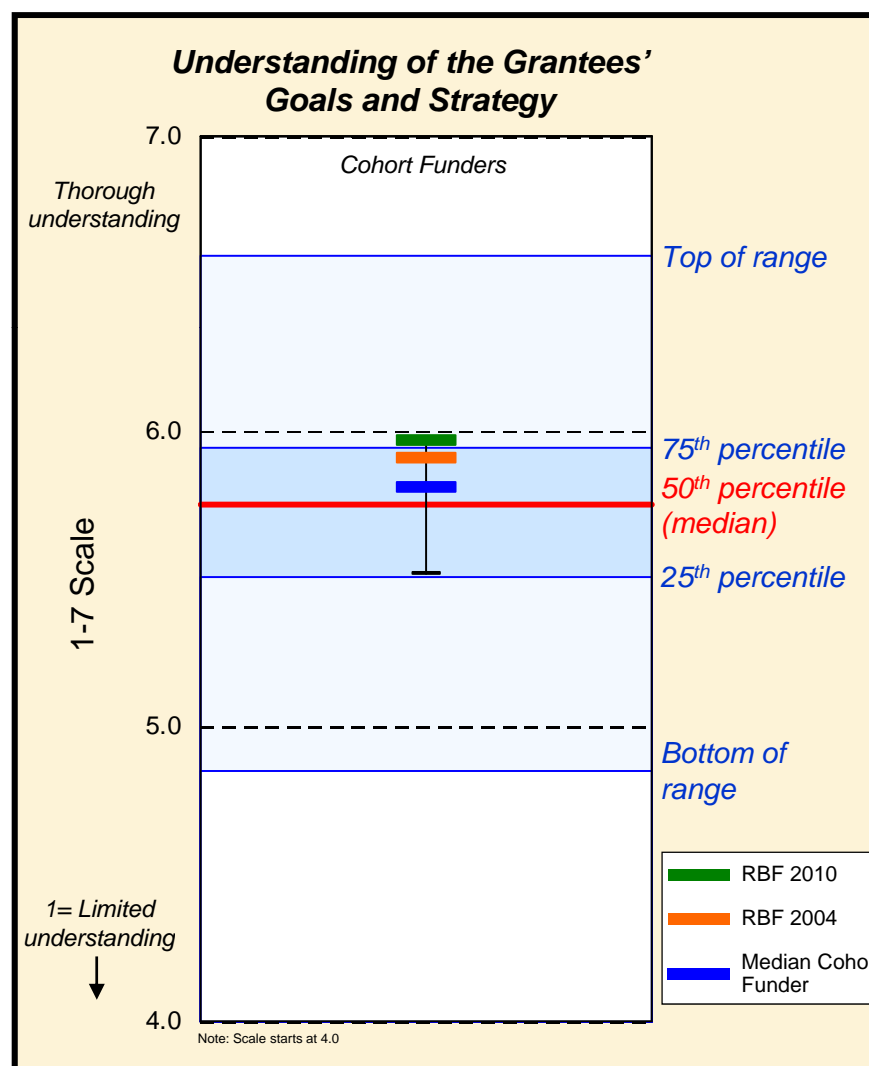
Selected Grantee Comments

- ♦ “We find RBF to be very responsive and a wonderful organization with which to work. More than any other resource, RBF has helped us grow our organization and further our mission.”
- ♦ “We greatly appreciate the Foundation’s understanding of the importance of what we do and only wish we could rely on them for even more consistent funding.”
- ♦ The Foundation’s support of our work has allowed us to conduct research and outreach that would otherwise not be possible that has a ripple effect in related communities – effectively by funding us, the Foundation has facilitated the participation of many additional organizations and individuals who rely on our work to do their work.”
- ♦ “Deeper more properly scaled unrestricted general operating support for arts producing organizations and production facilities would have longer term deeper impact. Things have changed radically for the arts in the last two years and adjustments need to be made or there could be dire permanent consequences.”

Understanding of Grantees' Goals and Strategy

On understanding of grantees' goals and strategy, RBF is rated:

- above the median funder
- higher than all other cohort funders

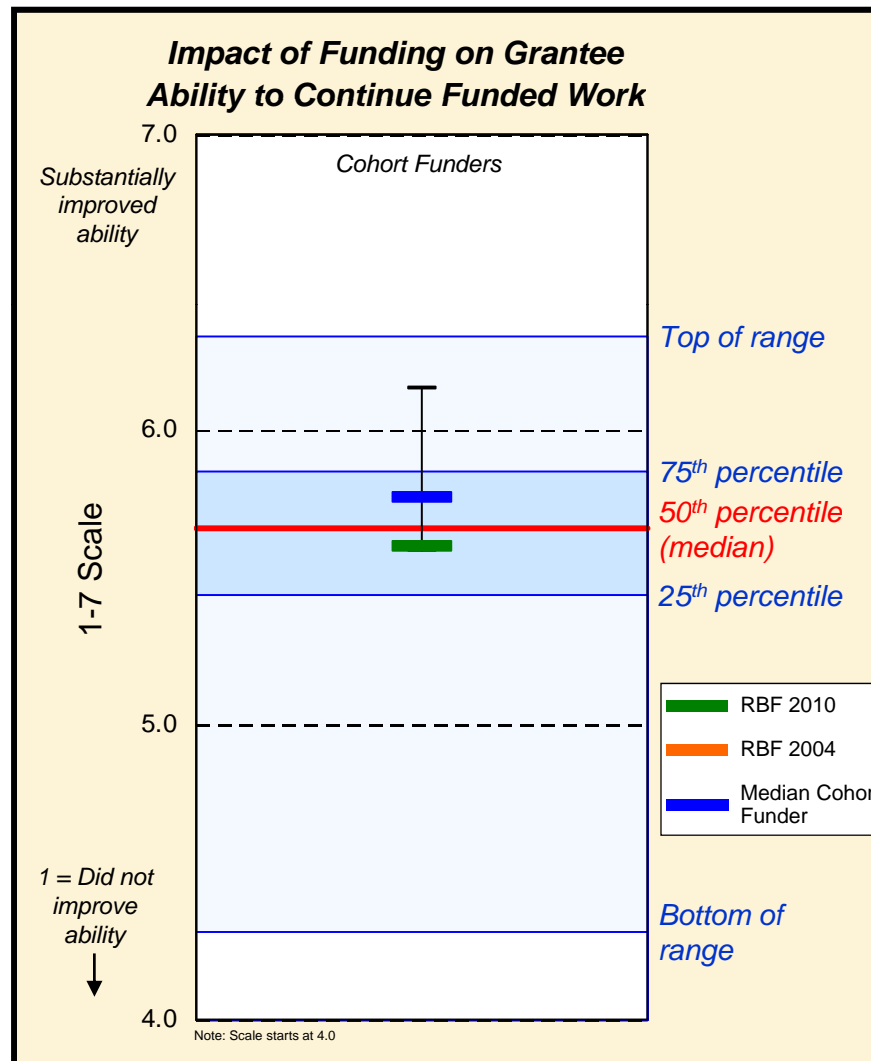


Note: This question includes a "don't know" response option; 6 percent of RBF 2010 respondents answered "don't know", compared to 7 percent at the median funder, 7 percent of RBF 2004 respondents, and 5 percent of respondents at the median cohort funder.

Impact on Sustainability of Funded Work

On the effect of the Fund's funding on grantees' ability to sustain the work funded by the grant in the future, RBF is rated:

- similarly to the median funder
- similarly to the lowest rated cohort funder



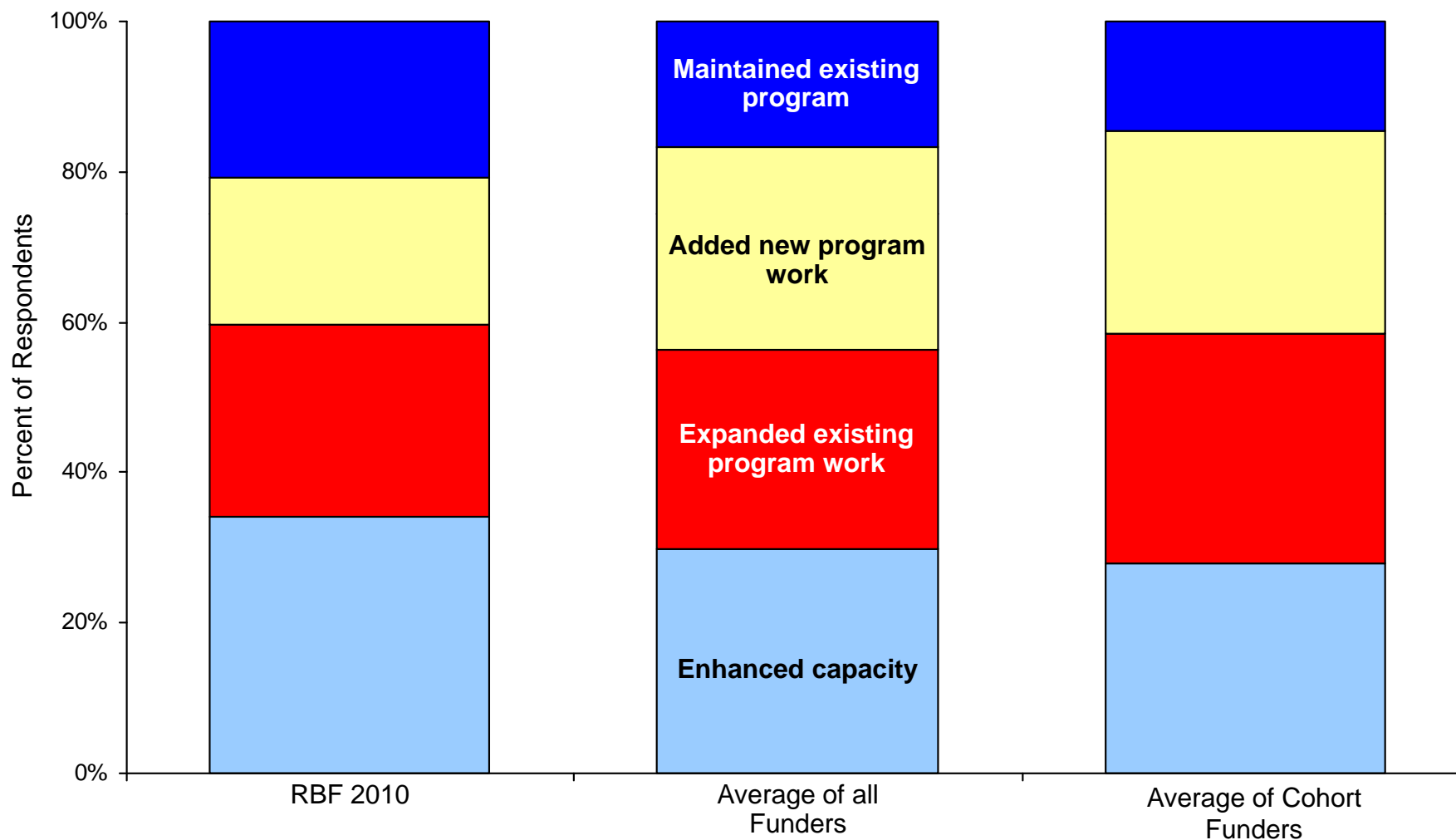
Note: This question includes a "don't know/not applicable" response option; 5 percent of RBF 2010 respondents answered "don't know/not applicable", compared to 11 percent at the median funder, and 7 percent of respondents at the median cohort funder. RBF 2004 data not available due to changes to the survey instrument.

Grant Effect

The proportion of RBF grantees that used the Foundation's grant primarily to add new program work is:

- smaller than that of the average funder
- smaller than that of the average cohort funder

Primary Effect of Grant on Grantee's Organization¹



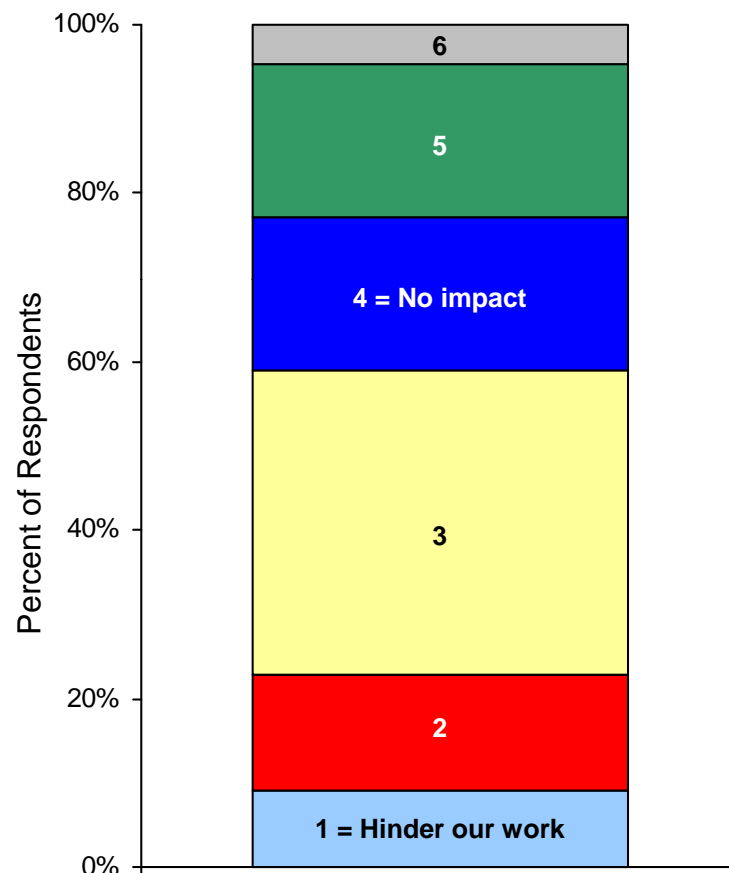
1: This chart includes data about 75 funders.

Note: RBF 2004 data not available due to changes to the survey instrument.

Effect of Current Laws and Regulations

RBF Pivotal Place: Western Balkans grantees were asked to rate how the current laws and regulations affect your organization's ability to achieve its goals, with 1 = "Hinder our work," 4 = "No impact," and 7 = "Facilitate our work."

How current laws and regulations effect the organization's ability to achieve its goals



Pivotal Place: W. Balkans
Average Rating 3.4

Percent of Respondents that
Answered "Don't know" 0%

Note: No comparative data is available because the question was only asked of RBF grantees.

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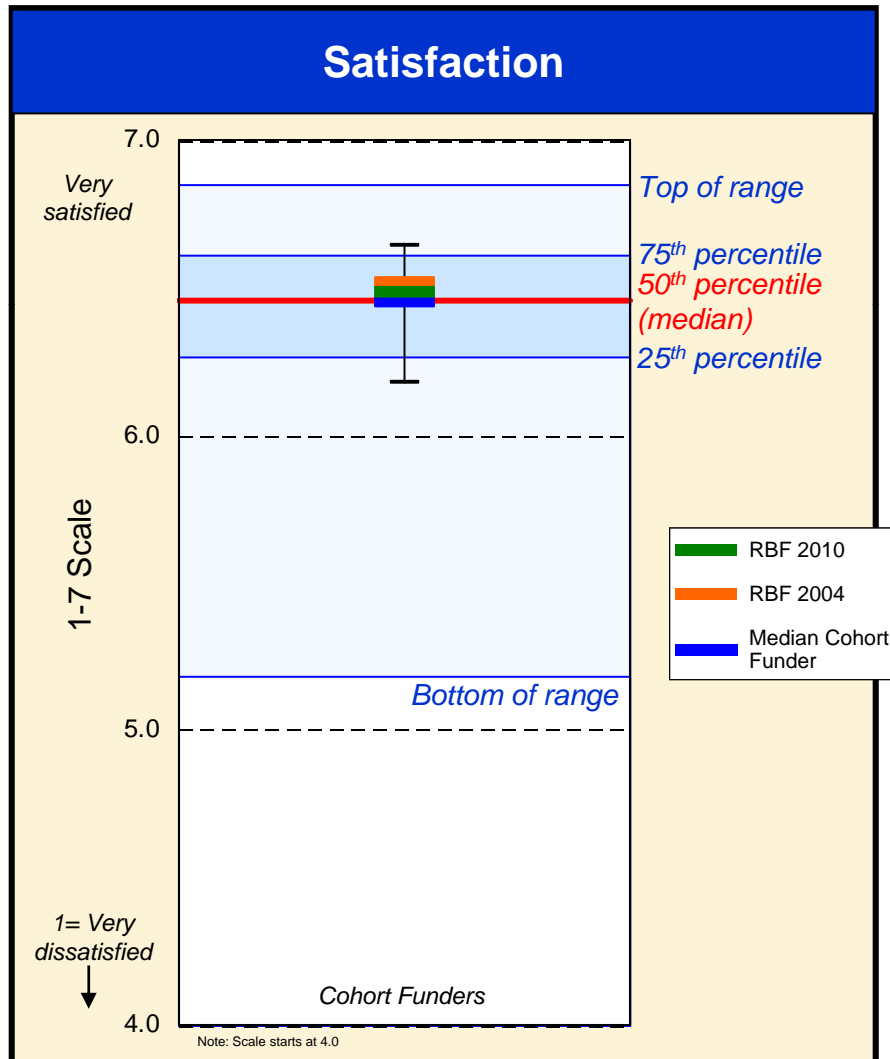
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Satisfaction

On overall satisfaction, RBF is rated:

- similarly to the median funder
- similarly to the median cohort funder



Selected Grantee Comments

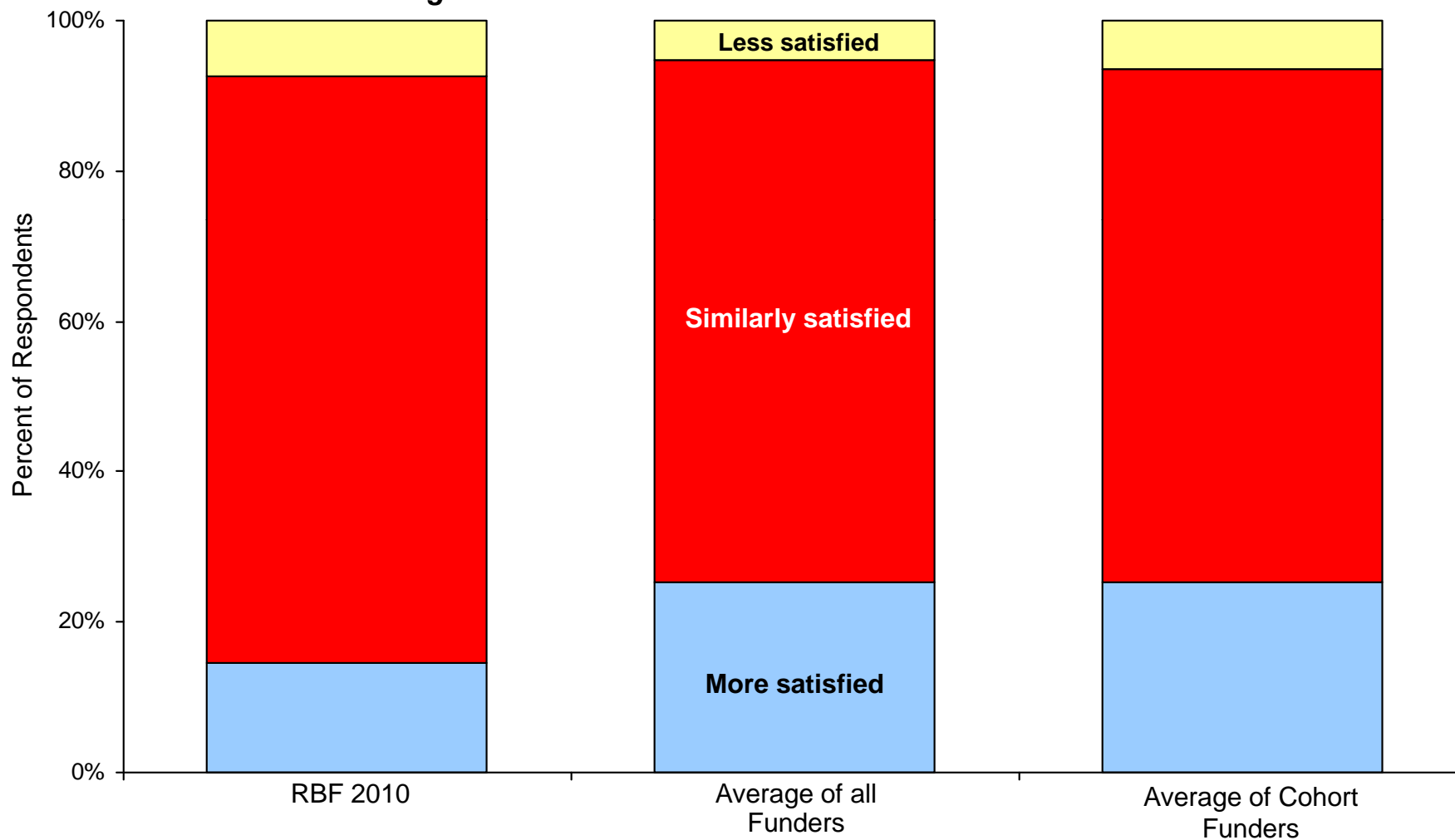
- ♦ “RBF is a role model for other private foundations, both in terms of the clarity and integrity of their funding processes, and their mission and commitment to creating meaningful, long-lasting change that promotes and respects diversity and cultural understanding world wide.”
- ♦ “The amount of time and work put into the grant process, in our case, did not match the outcome. This ended up being a costly process for our organization.”
- ♦ “The best I’ve worked with. Professional, grantee-centered, with program officers who really know their fields.”

Satisfaction Relative to Last Year

The proportion of RBF grantees that are more satisfied this year with the Fund than they were last year is:

- smaller than that of the average funder
- smaller than that of the average cohort funder

Change in Satisfaction with the Funder from Last Year ¹



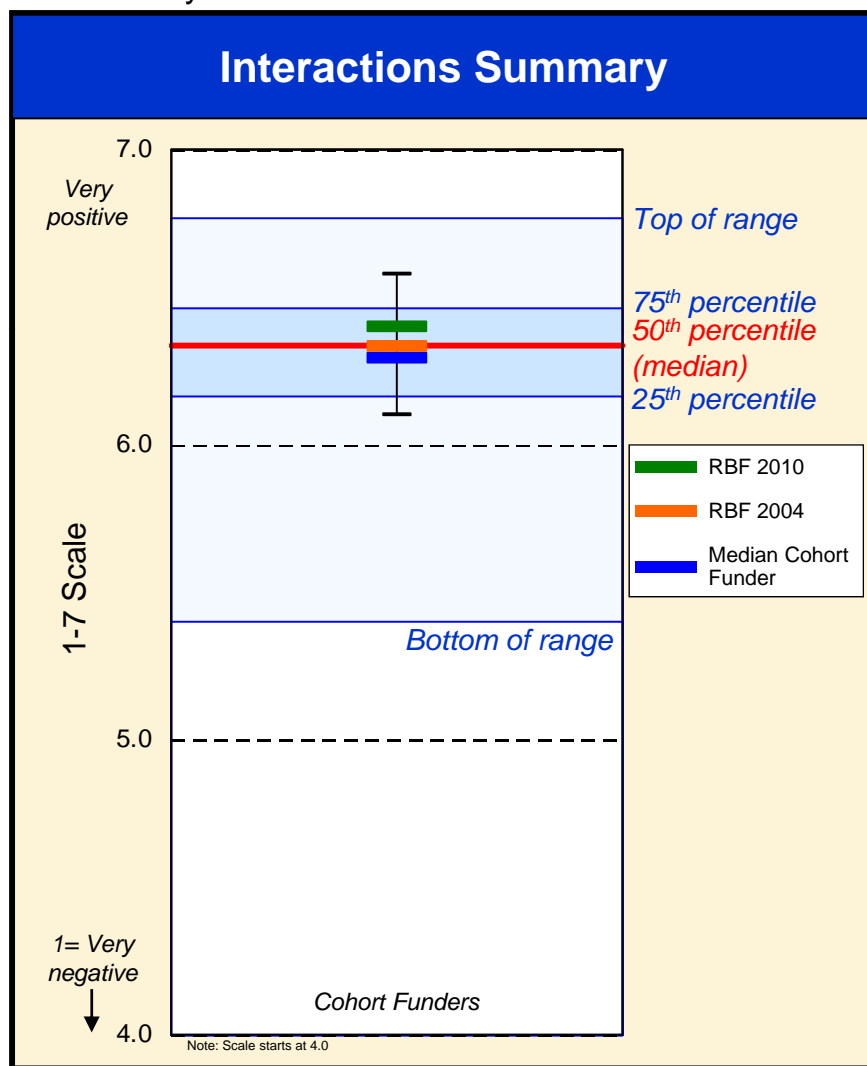
¹: Question asked of grantees that were receiving funding from the Fund last year as well as this year.

Note: RBF 2004 data not available due to changes to the survey instrument.

Grantee Interactions Summary

On this summary that includes grantees' comfort approaching the Fund if a problem arises, responsiveness of Fund staff, and fairness of the Fund's treatment of grantees, RBF is rated:

- similarly to the median funder
- similarly to the median cohort funder



Selected Grantee Comments

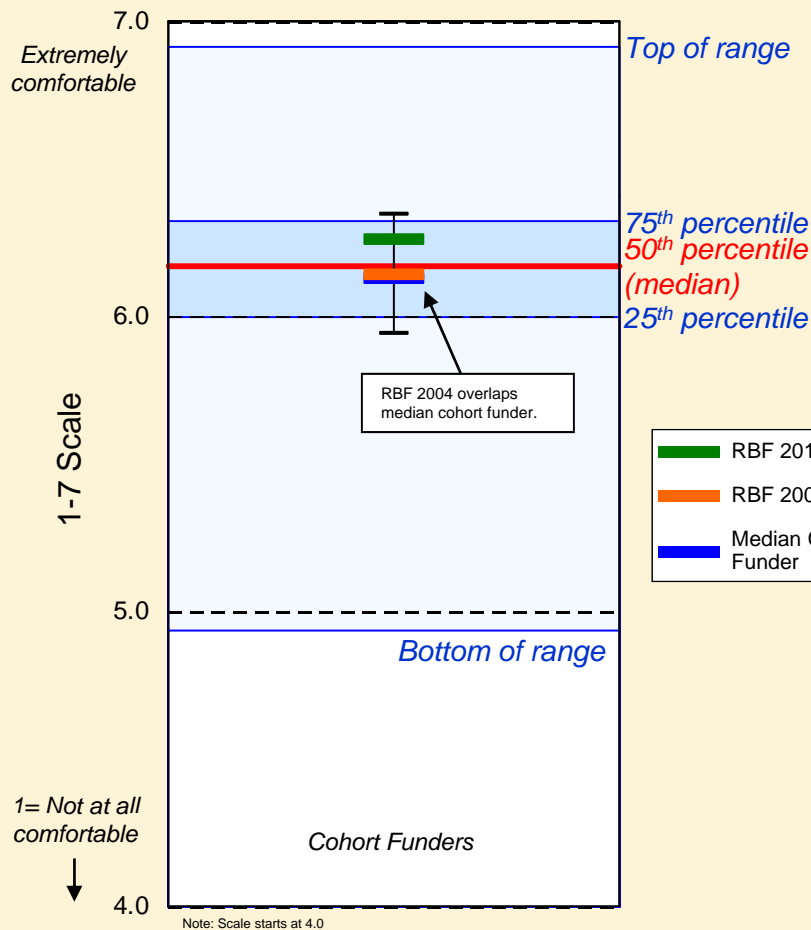
- ♦ “Working with RBF is a pleasure. The relationship is highly professional. Many other foundations act in a manner that is similar to government agencies – rigid, standoffish, not friendly. RBF collaborates with its grant recipients – it stands alone in this regard.”
- ♦ “Over the last [several] years we have worked with four different program officers. The quality ranges from extraordinary enablers and advisers to energy draining gate keepers.”
- ♦ “Generally good. Quality of communication can vary by program officer. Some program officers are natural connectors and communicators – providing exceptional help and advice. Others have been more like power broker – operating at elite levels without much time or interest in the connector role.”
- ♦ “Working with RBF program officers is a very satisfactory experience in terms of the degree of mutual respect, common concern, and the sense of common responsibility and engagement in respect of the issue or topic being discussed.”

Interactions Measures (1)

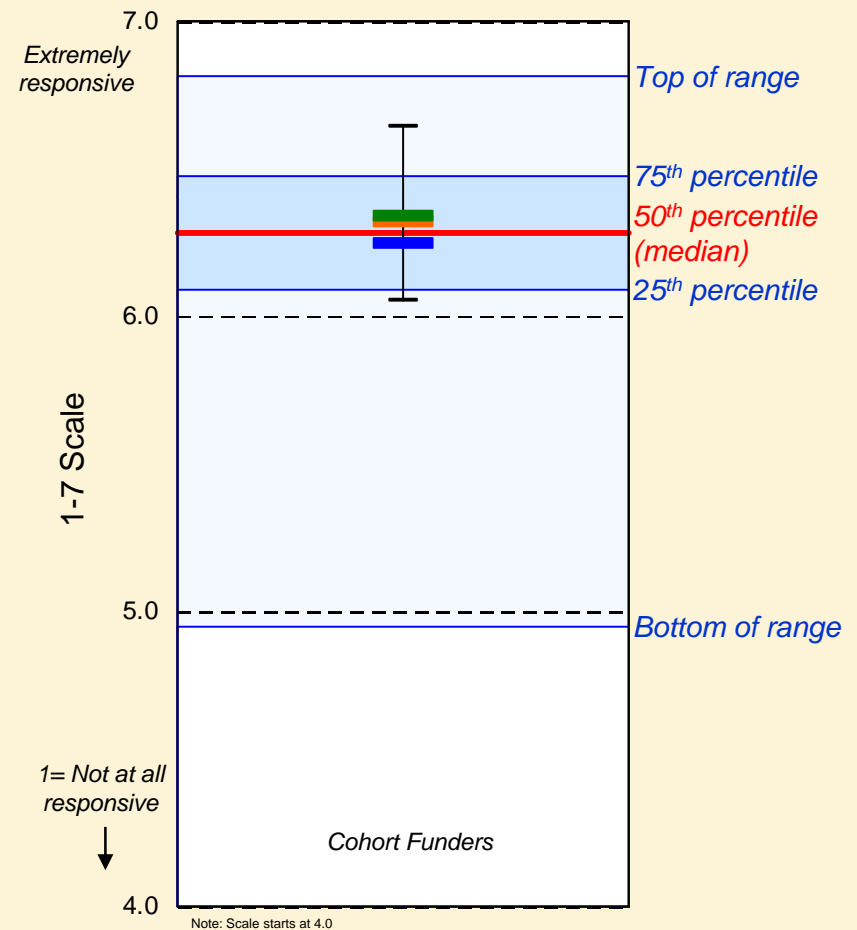
On grantees' comfort in approaching the Fund if a problem arises, On responsiveness of Fund staff to grantees, RBF is rated:
RBF is rated

- above the median funder
- above the median cohort funder
- similarly to the median funder
- similarly to the median cohort funder

Grantee Comfort Approaching the Funder if a Problem Arises



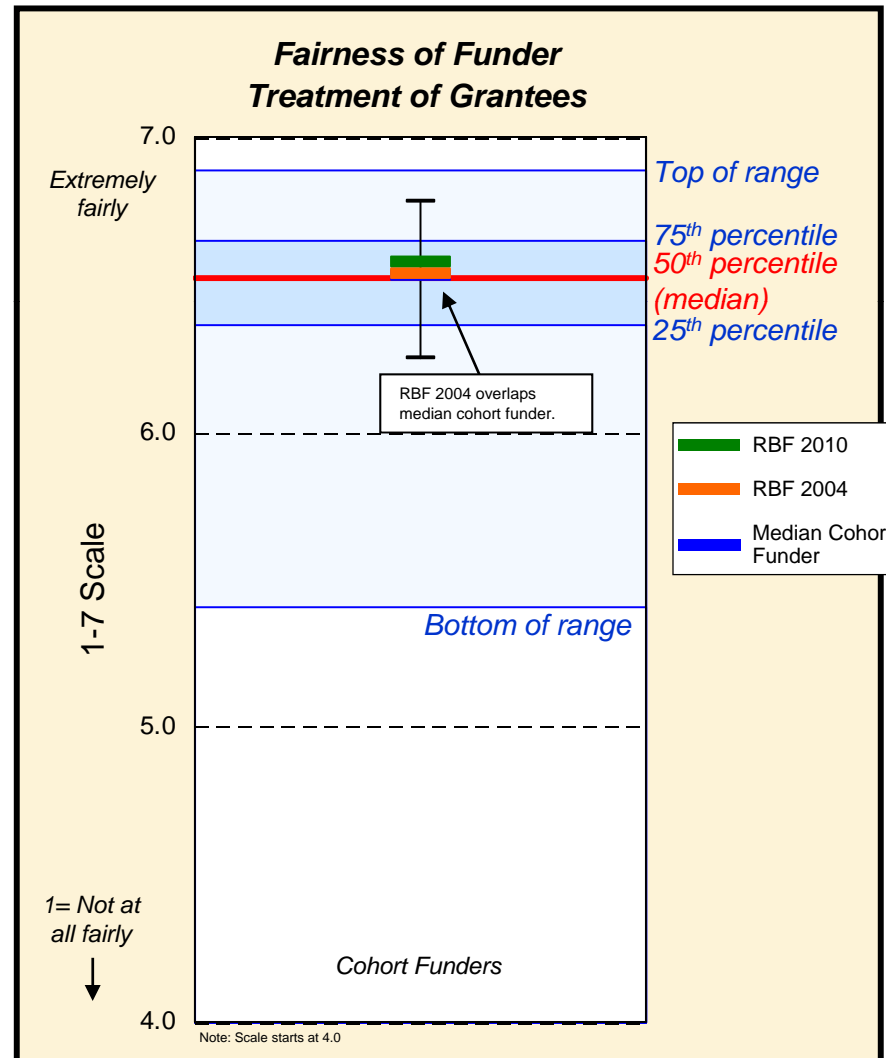
Responsiveness of Funder Staff



Interactions Measures (2)

On fairness of treatment of grantees, RBF is rated:

- similarly to the median funder
- similarly to the median cohort funder

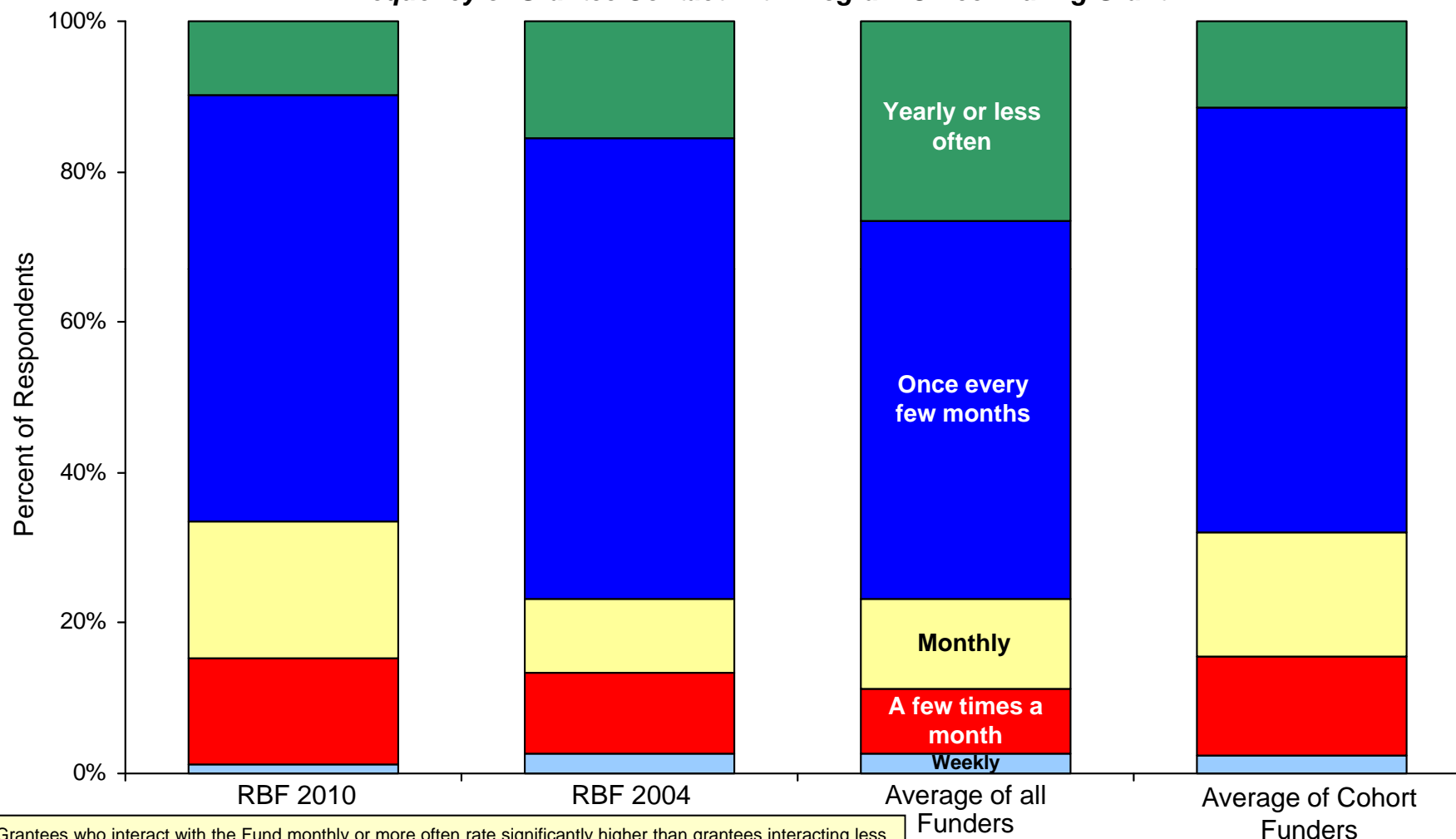


Frequency of Interactions

The proportion of RBF grantees that report interacting with their program officer once every few months or more frequently is:

- larger than that of the average funder
- similar to that of the average cohort funder

Frequency of Grantee Contact with Program Officer During Grant



Grantees who interact with the Fund monthly or more often rate significantly higher than grantees interacting less frequently on many measures throughout the report, including:

- Impact on and understanding of grantees' fields
- Impact on and understanding of grantees' organization
- Clarity of communication of goals and strategy

Initiation of Interactions

The proportion of RBF grantees that report that they most frequently initiate interactions with the Fund is

- larger than that of the average funder
- larger than that of the average cohort funder

Grantees who report they most frequently initiate interactions with the Fund rate significantly lower than grantees who report equal initiation of contact on many measures throughout the report, including:

- Impact on and understanding of grantees' fields
- Understanding of grantees' goals and strategy
- Overall satisfaction
- Quality of interactions
- Clarity of communication of goals and strategy

Initiation of Grantee Contact with Program Officer During Grant

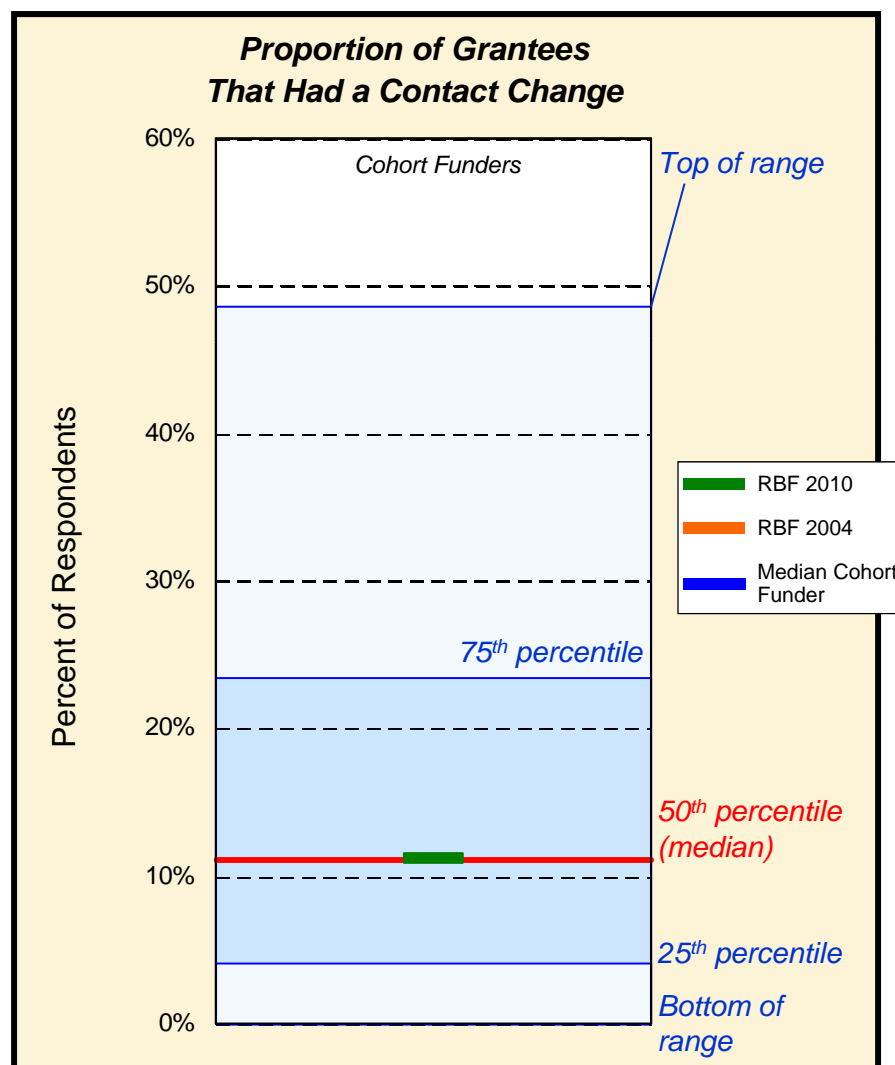


Note: RBF 2004 data not available due to changes to the survey instrument.

Proportion of Grantees That Had a Change in Primary Contact

The proportion of RBF grantees who had a change in their primary contact in the last six months is:

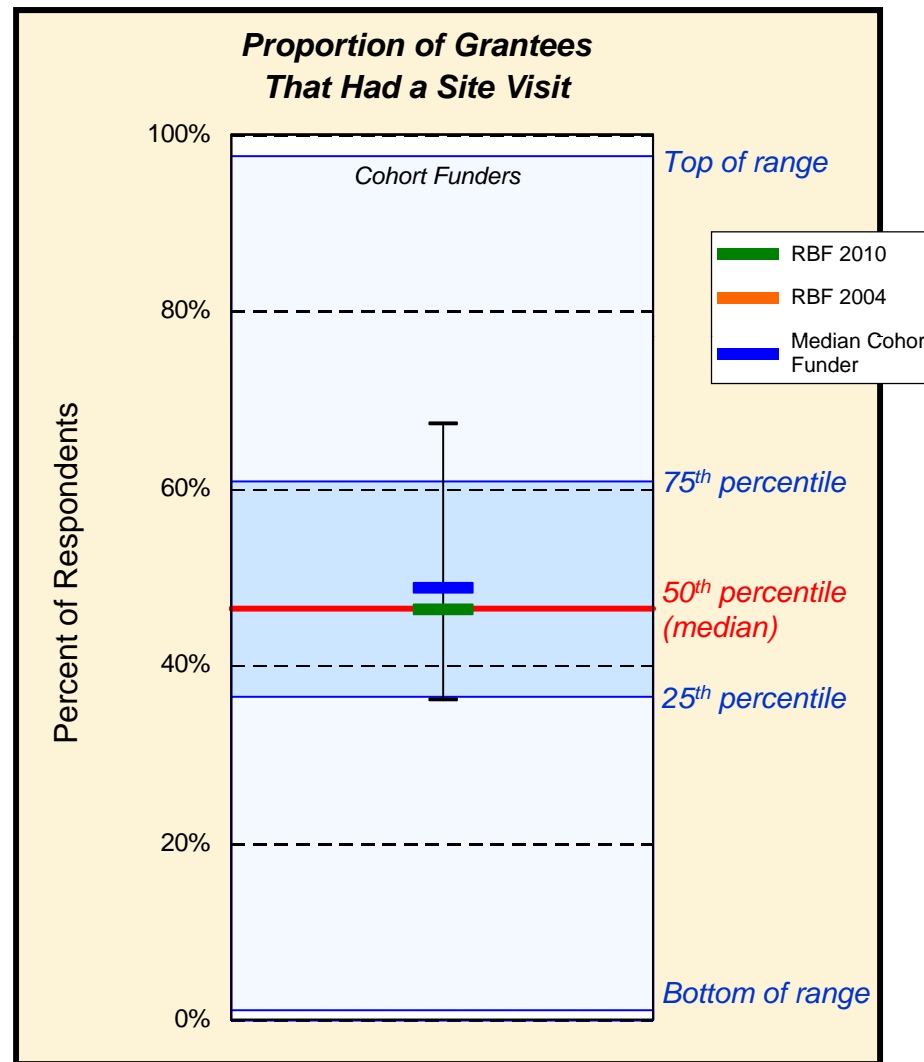
- similar to that of the median funder



Proportion of Grantees That Had a Site Visit

The proportion of RBF grantees receiving a site visit is:

- similar to that of the median funder
- similar to that of the median cohort funder

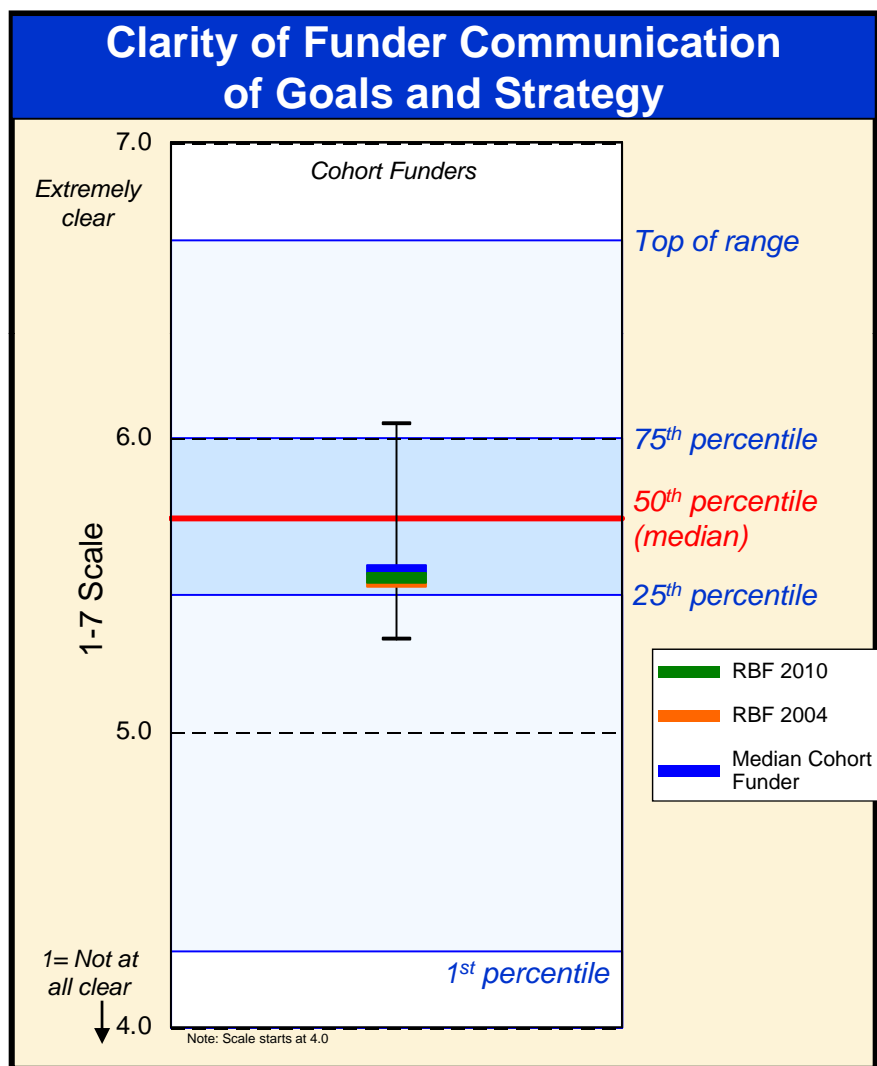


Note: Chart created by aggregating data about site visits that occurred during the selection, reporting and evaluation processes, and during the course of the grant.
RBF 2004 data not available due to changes to the survey instrument.

Communication of Goals and Strategy

On clarity of the Fund's communication of its goals and strategy, RBF is rated:

- below the median funder
- similarly to the median cohort funder



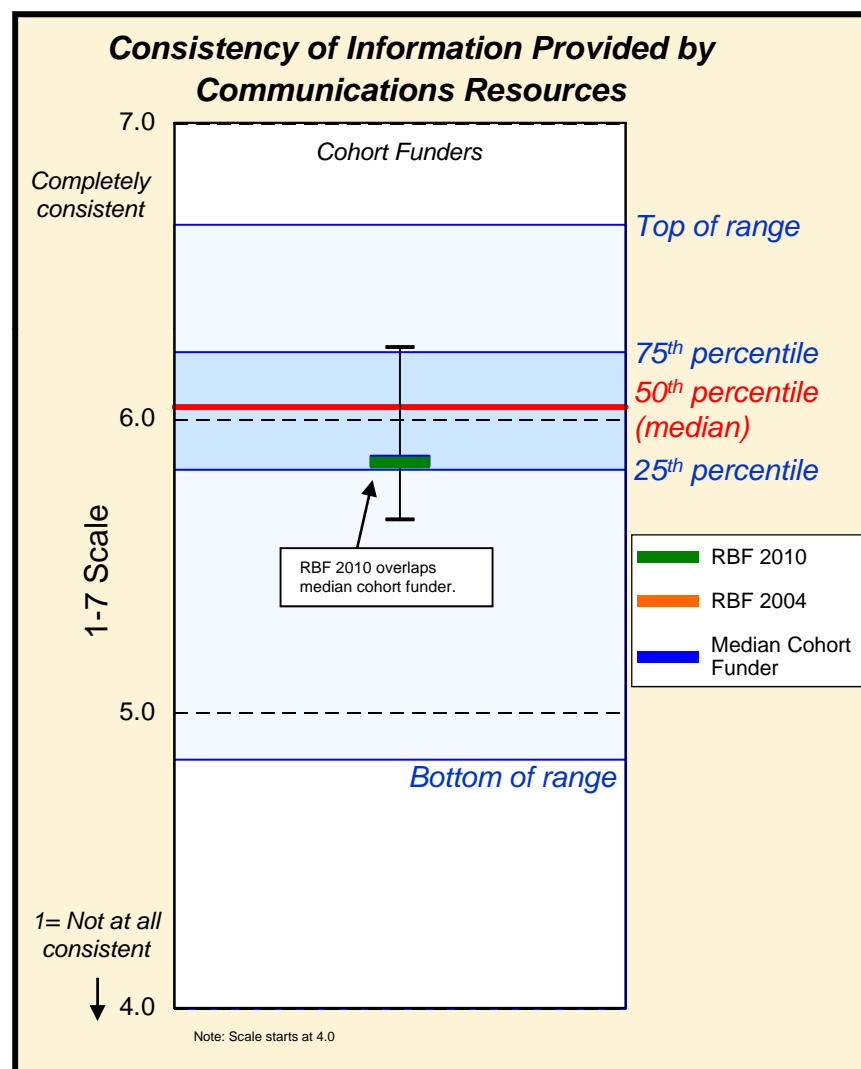
Selected Grantee Comments

- ♦ "All RBF staffers are extremely helpful. But when the program official changed for Peace and Security, I was unaware of this development until I heard from others outside RBF."
- ♦ "In general, my funding officer has been extremely helpful. Honestly, interaction with him has helped us clarify our strategy.... On the other hand, the website has just barely been helpful, and formal RBF processes have been rather oblique to our ways of working. It's the personal relationship that has worked."
- ♦ "On a couple of occasions, it was unclear to us if statements made by an RBF staff person regarding our programs were personal opinion or RBF policy. Otherwise, things have been very clear."
- ♦ "RBF is one of the classiest foundations to work with. They respect grantor/grantee relationships. They are clear and honest in their communications and communicate with sensitivity rather than arrogance."
- ♦ "I have never received or reviewed program area guidelines and my basis for information is entirely one to one discussion with my program officer or her director."

Consistency of Communications

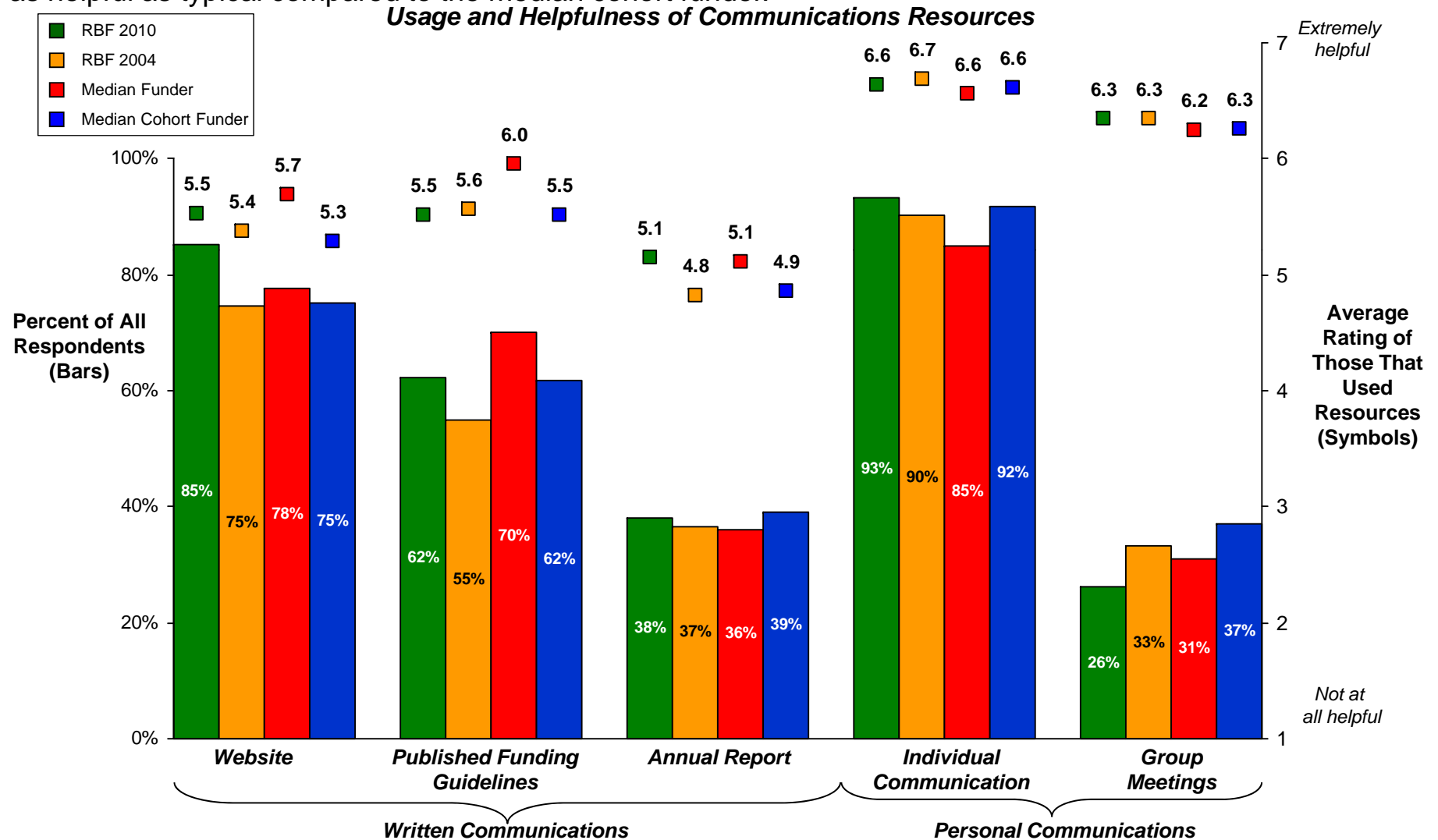
On consistency of the Fund's communications resources, both personal and written, RBF is rated:

- below the median funder
- similarly to the median cohort funder



Communications Resources

Compared to the median philanthropic funder, a smaller than typical proportion of RBF grantees report using the Fund's published funding guidelines and they rate them as less helpful than typical. Grantees use the published funding guidelines as frequently as typical for the median cohort funder and find them as helpful as typical compared to the median cohort funder.



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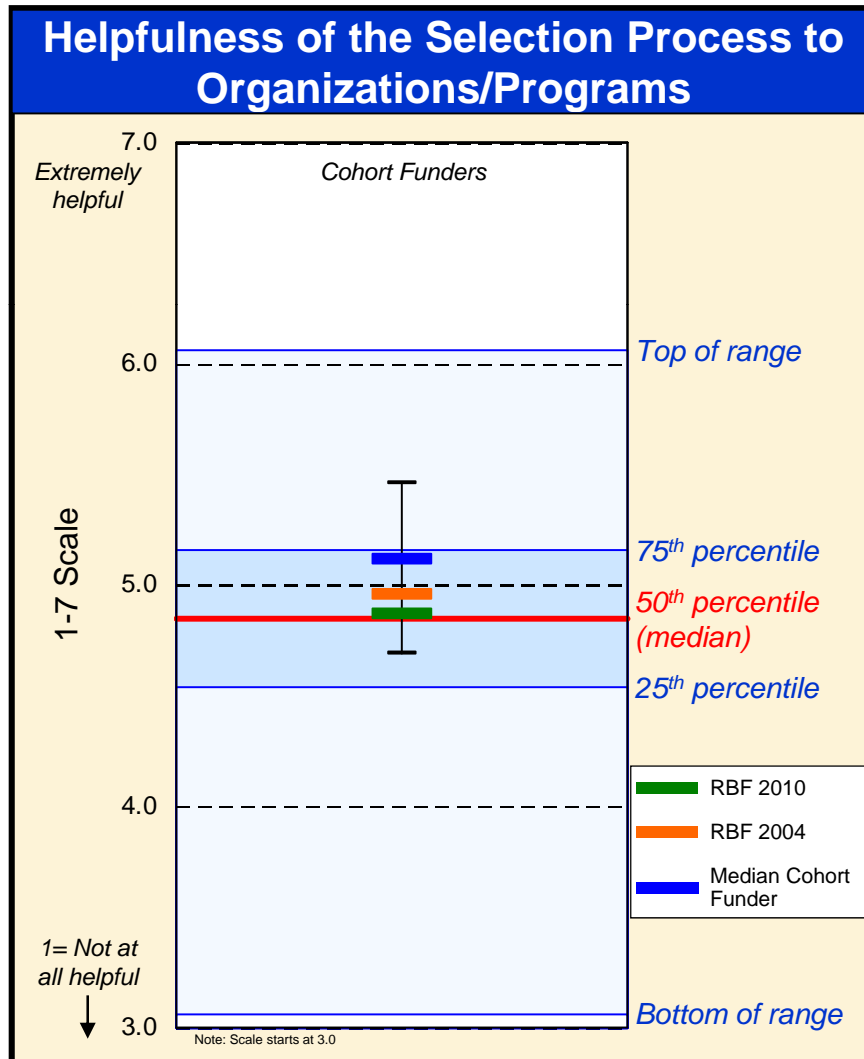
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Helpfulness of Selection Process

On helpfulness of the Fund's selection process in strengthening funded organizations/programs, RBF is rated:

- similarly to the median funder
- below the median cohort funder



Selected Grantee Comments

- ♦ "The Foundation's well-laid out informational resources and processes, as well as the Foundation staff's responsiveness and ability to communicate effectively the Foundation's priorities were extremely helpful in clarifying for us the best way to capture critical data both before and after the proposal process."
- ♦ "The process is open and communication allows both RBF and our organization to understand each other needs and requirements."
- ♦ "...Foundation staff are approachable and straightforward in their responses to our requests. We wish there were more leeway given the economic conditions we now face."
- ♦ "Initial contact was difficult and required persistence. It took some time to find clarity on what the Foundation funds in the area of culture. As with most foundations, funding levels for the arts and restrictions on funding are at odds with sector needs."
- ♦ "...conversations with [our program officer] have helped us to better understand the goals and intent of the Foundation (especially the Board's preferences) and helped us to better identify aspects of our work that are most likely to be supported by the Foundation."

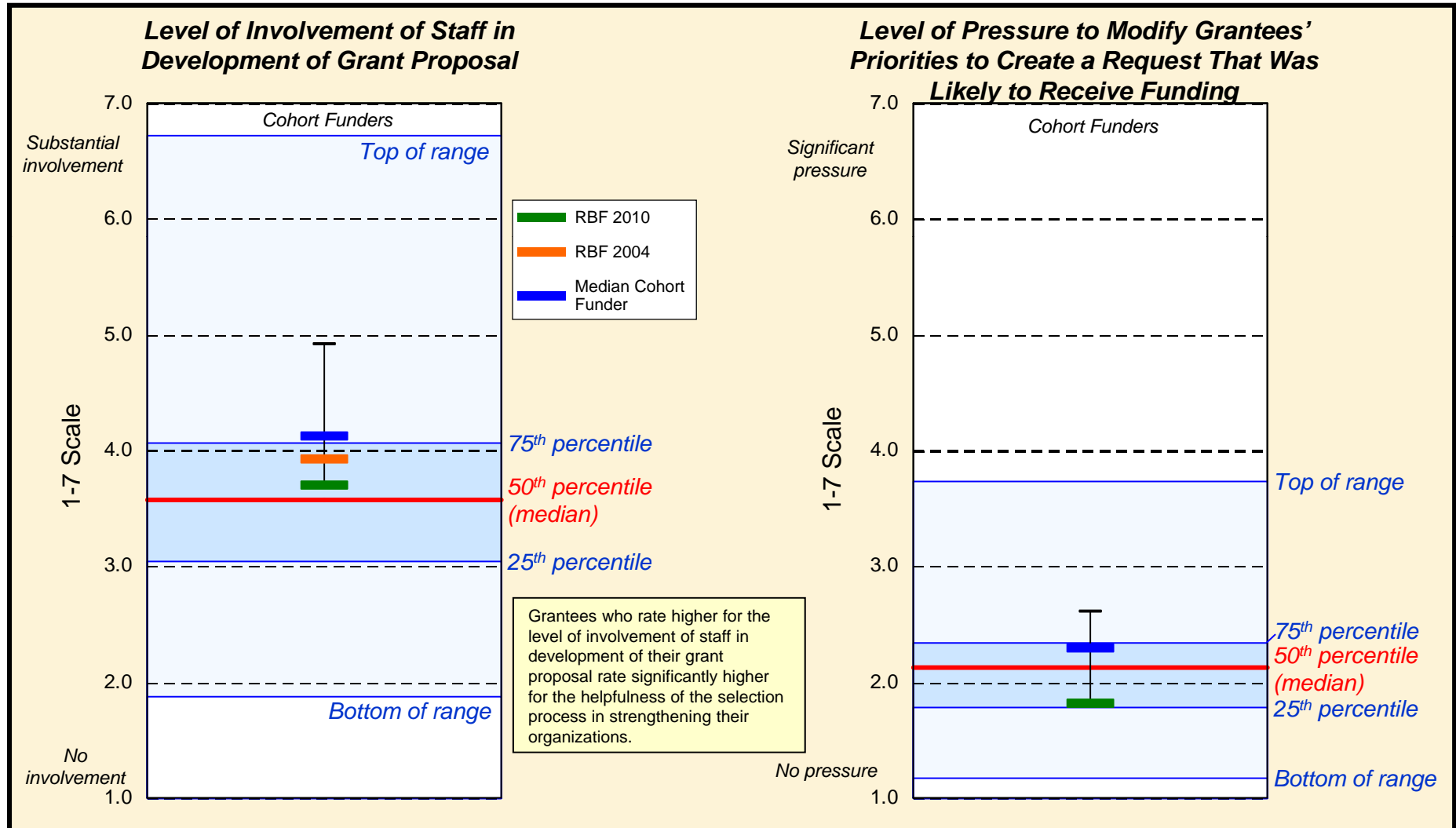
Funder Involvement and Pressure in Selection Process

On the level of involvement in the development of grantees' proposals, RBF is rated:

- similarly to the median funder
- lower than all other cohort funders

On the level of pressure grantees feel to modify their priorities to create a proposal that was likely to receive funding, RBF is rated:

- below the median funder
- lower than all other cohort funders

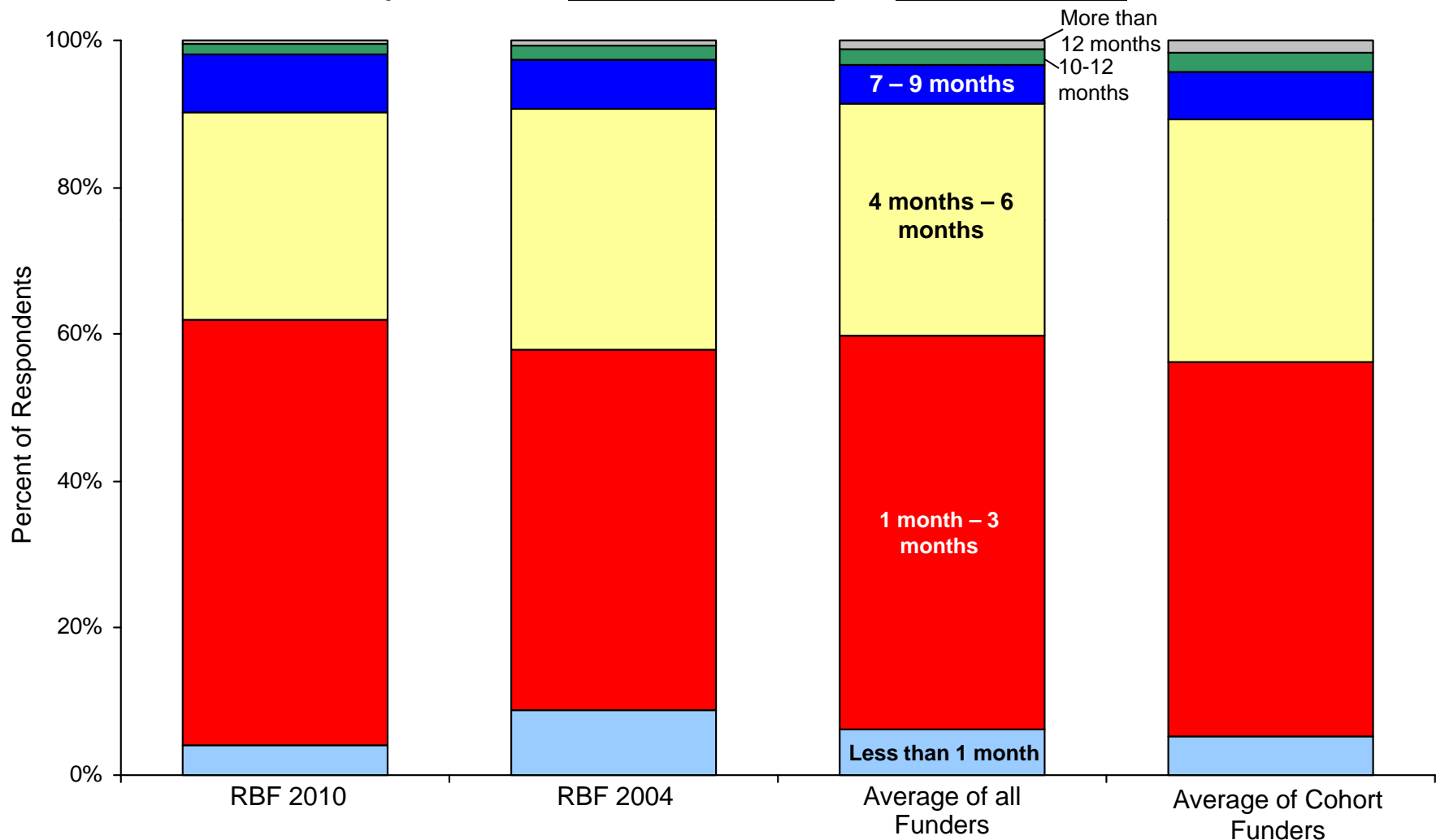


Time Between Submission and Clear Commitment

The proportion of RBF grantees that report that seven months or more elapsed between submission of proposal and clear commitment of funding is:

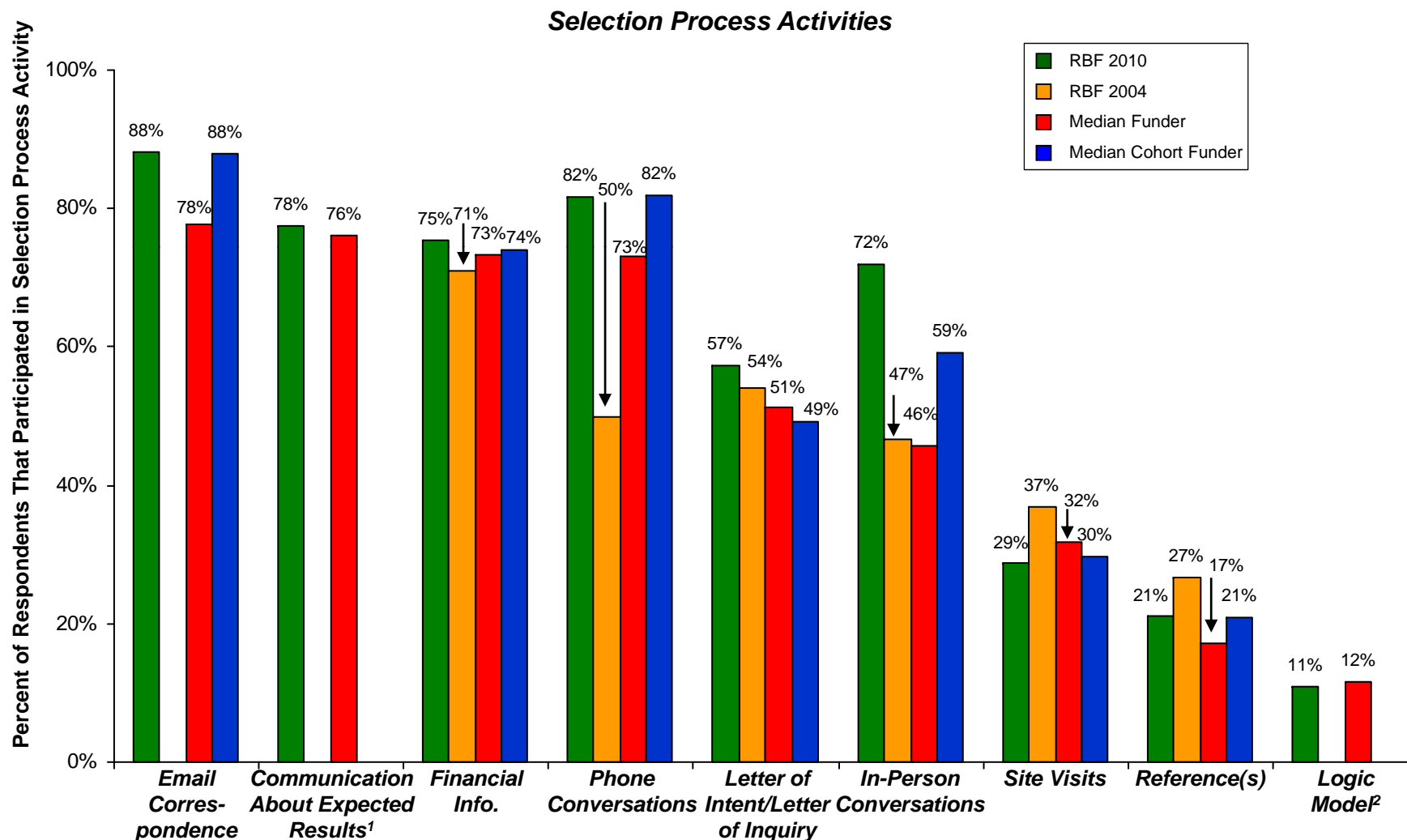
- similar to that of the average funder
- similar to that of the average cohort funder

Time Elapsed Between Proposal Submission and Clear Commitment



Selection Process Activities

Compared to grantees of the median philanthropic funder, RBF grantees more frequently report engaging in phone and in-person conversations with Fund staff as part of the selection process. Grantees report engaging in phone conversations as frequently as the median cohort funder but they report in-person conversations more frequently than the grantees at the median cohort funder.



1: Represents data from 30 funders.

2: Represents data from 16 funders.

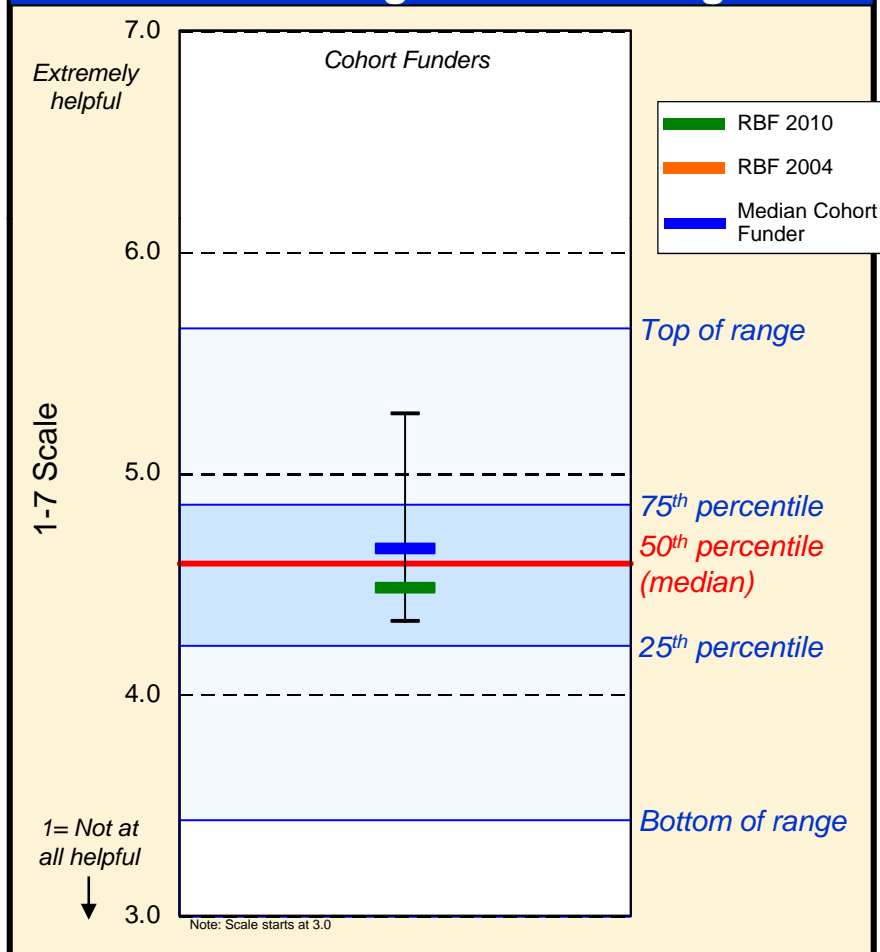
Note: RBF 2004 data on "email correspondence," "communication about expected results," and "logic model" and Cohort funder data on "communication about expected results" and "logic model" not available due to changes to the survey instrument.

Helpfulness of Reporting and Evaluation Processes

On helpfulness of the Fund's reporting/evaluation process in strengthening funded organizations/programs, RBF is rated:

- similarly to the median funder
- below the median cohort funder

Helpfulness of Reporting and Evaluation Processes to Organizations/Programs



Selected Grantee Comments

- ♦ "Reporting requirements are...diligent, but not burdensome."
- ♦ "The only unclear [element] was regarding the reporting process, when we didn't know what kind of reporting is required from us. We believe that it would be very helpful if RBF has any reporting format available."
- ♦ "I like the hands-on nature of this Foundation and the fact that we are not burdened with excessive proposal and reporting paperwork. This is a results oriented foundation and I hope it stays that way."

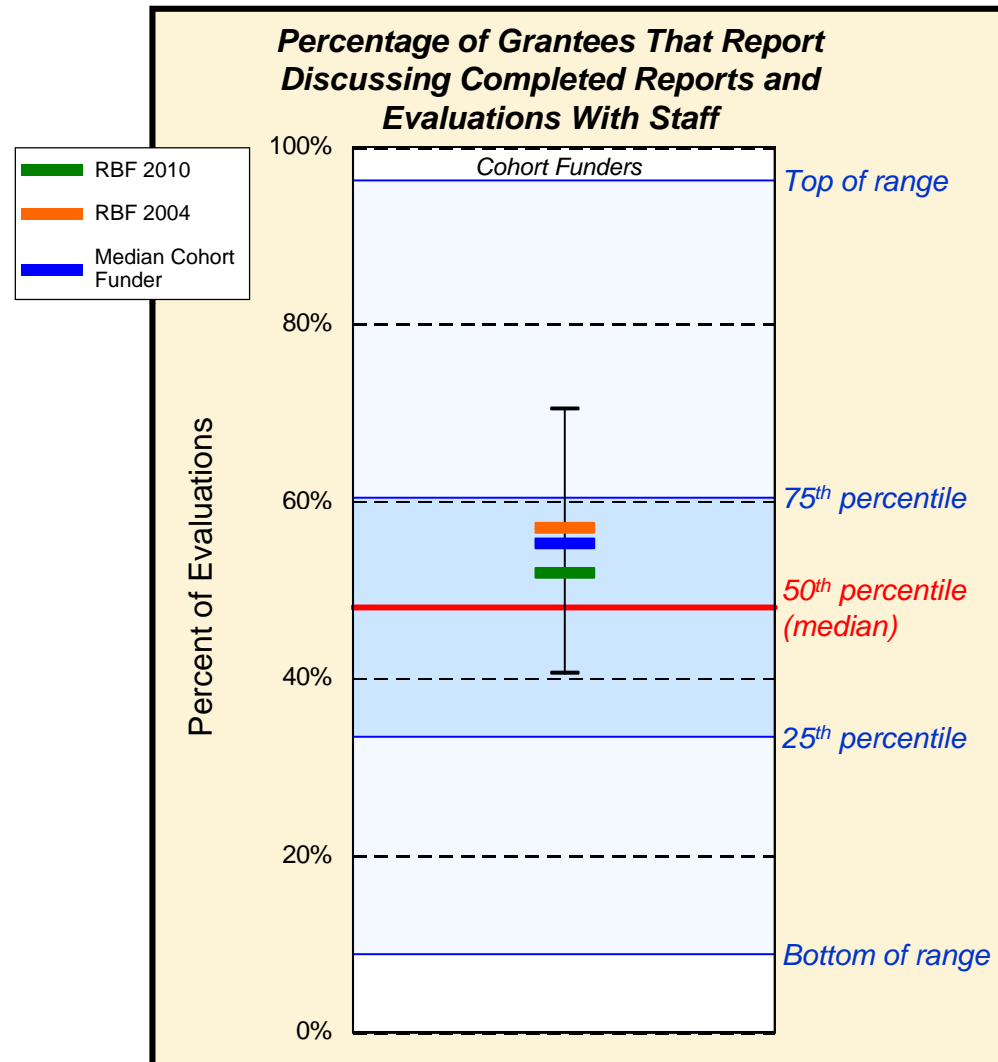
Note: This question was only asked of those grantees that had participated in a reporting or evaluation process by the time they took the survey. For RBF 2010, 62 percent of grantees indicated that they had participated in a reporting or evaluation process by the time they took the survey, compared to 62 percent at the median funder and 63 percent at the median cohort funder.

Note: RBF 2004 data not available due to changes to the survey instrument.

Reporting and Evaluation Processes

The proportion of RBF grantees that reported discussing their completed reports or evaluations with Fund staff is:

- similar to that of the median funder
- smaller than that of the median cohort funder



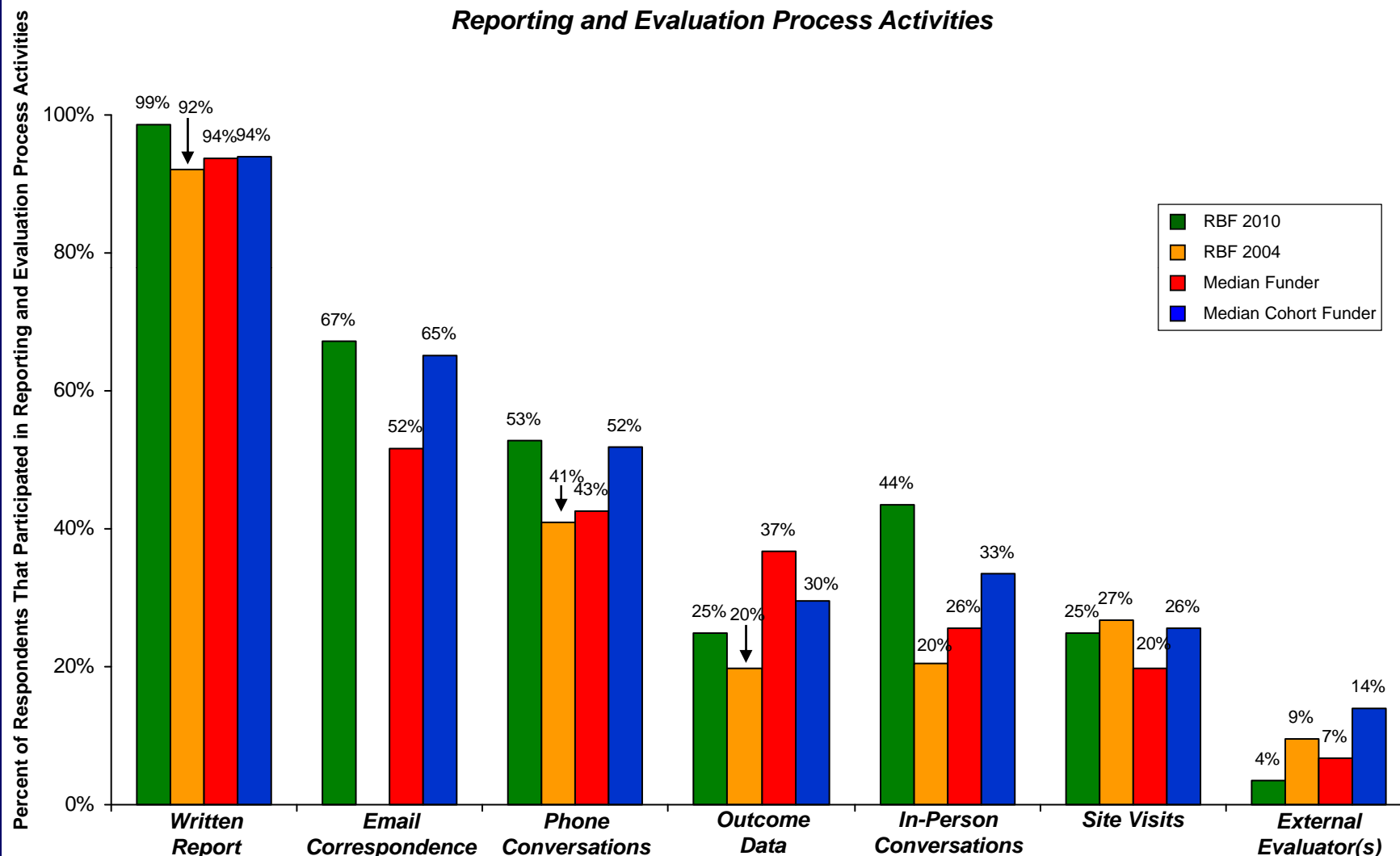
Grantees who have discussed their completed reports and evaluations with staff rate significantly higher for the helpfulness of the reporting/evaluation process in strengthening their organizations.

Note: This question was only asked of those grantees that had participated in a reporting or evaluation process by the time they took the survey. For RBF 2010, 62 percent of grantees indicated that they had participated in a reporting or evaluation process by the time they took the survey, compared to 62 percent at the median funder and 63 percent at the median cohort funder.

Reporting and Evaluation Process Activities

RBF grantees more frequently report engaging in email correspondence, and phone and in-person conversations with Fund staff as part of the reporting and evaluation processes than is typical. The proportion of grantees who report these activities is similar to the proportion at the median cohort funder.

Reporting and Evaluation Process Activities

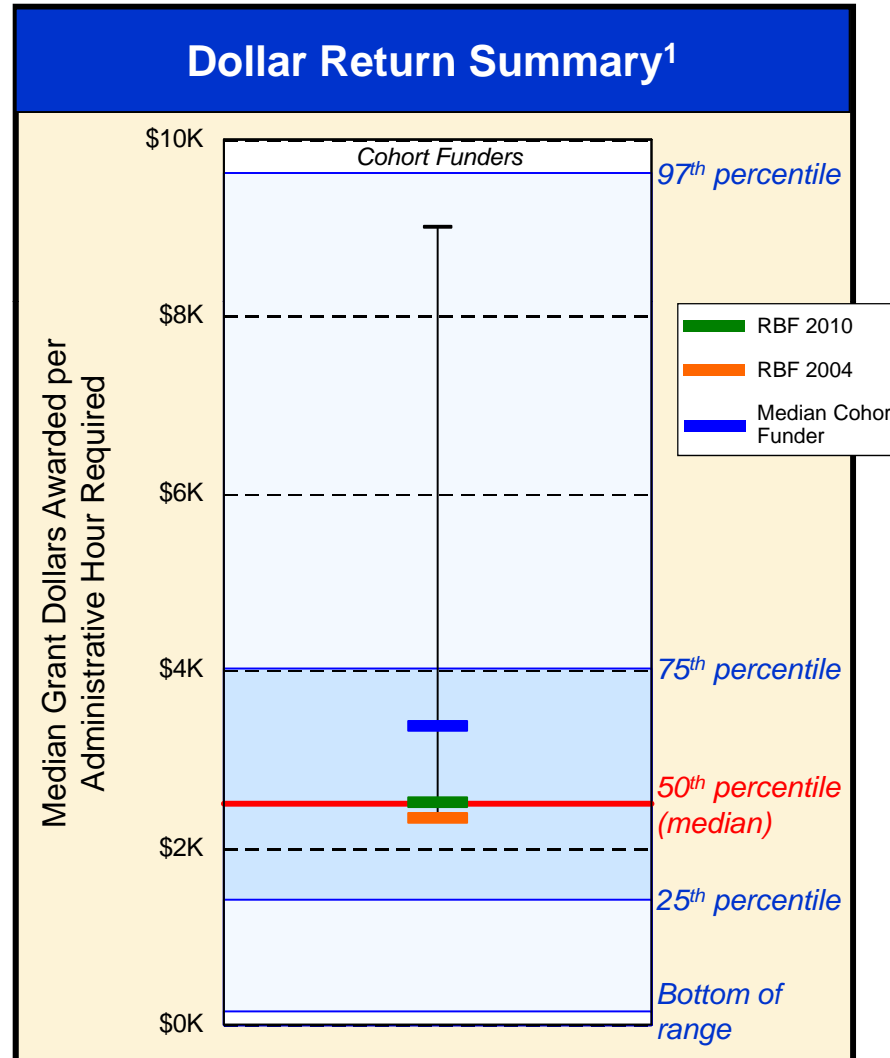


Note: This question was only asked of those grantees that had participated in a reporting or evaluation process by the time they took the survey. For RBF 2010, 62 percent of grantees indicated that they had participated in a reporting or evaluation process by the time they took the survey, compared to 62 percent at the median funder and 63 percent at the median cohort funder. RBF 2004 data on "email correspondence" not available due to changes to the survey instrument.

Dollar Return Summary

This summary measure includes the total grant dollars awarded and the total time necessary to fulfill the administrative requirements over the lifetime of the grant. At the median, the number of dollars awarded per hour of administrative time spent by RBF grantees is:

- similar to that of the median funder
- less than that of the median cohort funder



¹: Dollar Return on Grantee Administrative Hours is calculated for each grantee and aggregated by philanthropic funder for the Dollar Return Summary. Chart does not show data from seven funders whose Dollar Return on Grantee Administrative Hours exceeds \$10K.

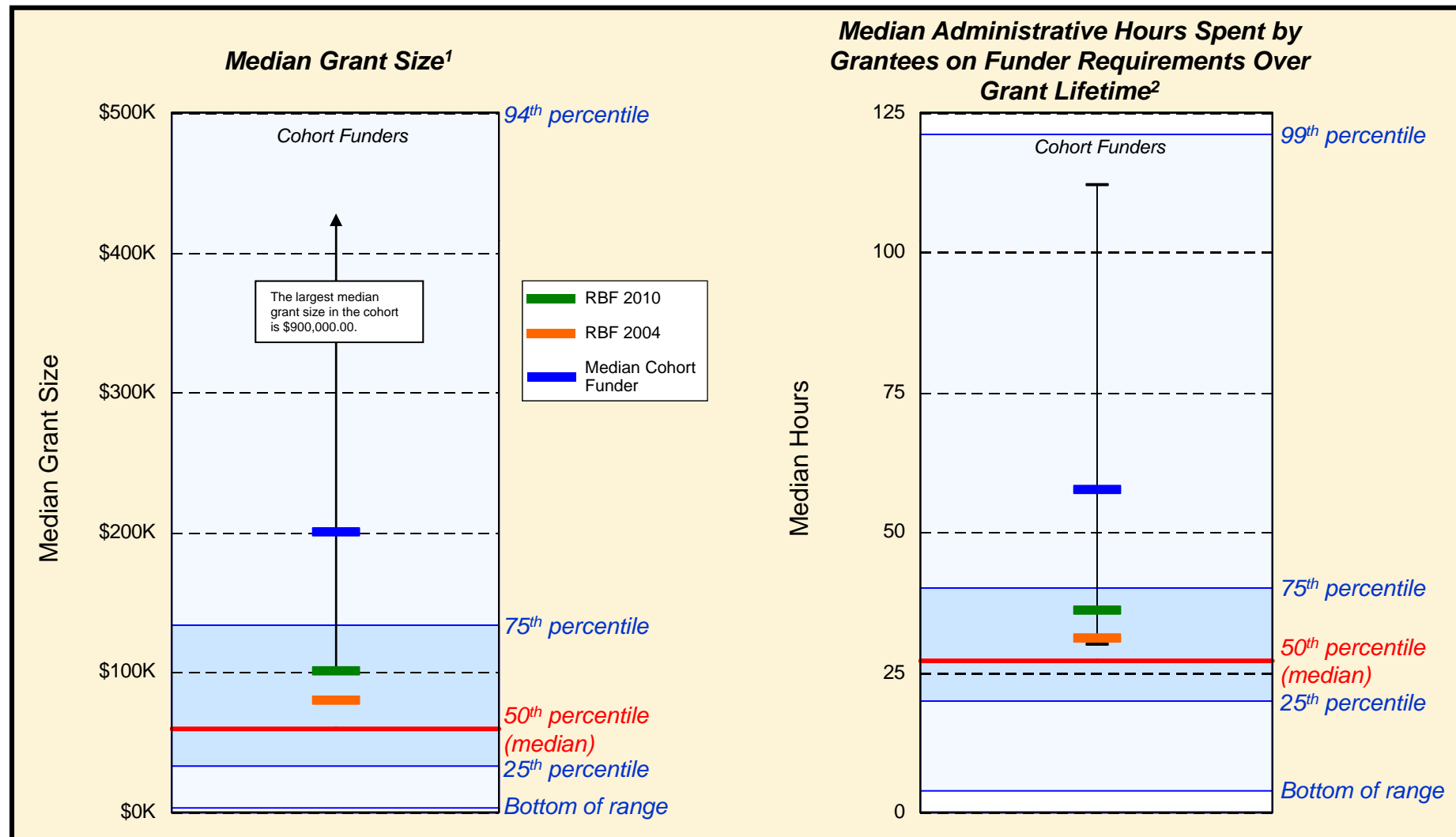
Grant Size and Administrative Time

At the median, the grant size reported by RBF grantees is:

- larger than that of the median funder
- smaller than that of all other cohort funders

At the median, the number of hours of administrative time spent by RBF grantees during the course of the grant is:

- greater than the time spent by grantees of the median funder
- less than the time spent by grantees of the median cohort funder



1: Chart does not show data from eleven funders whose median grant size exceeds \$500K.

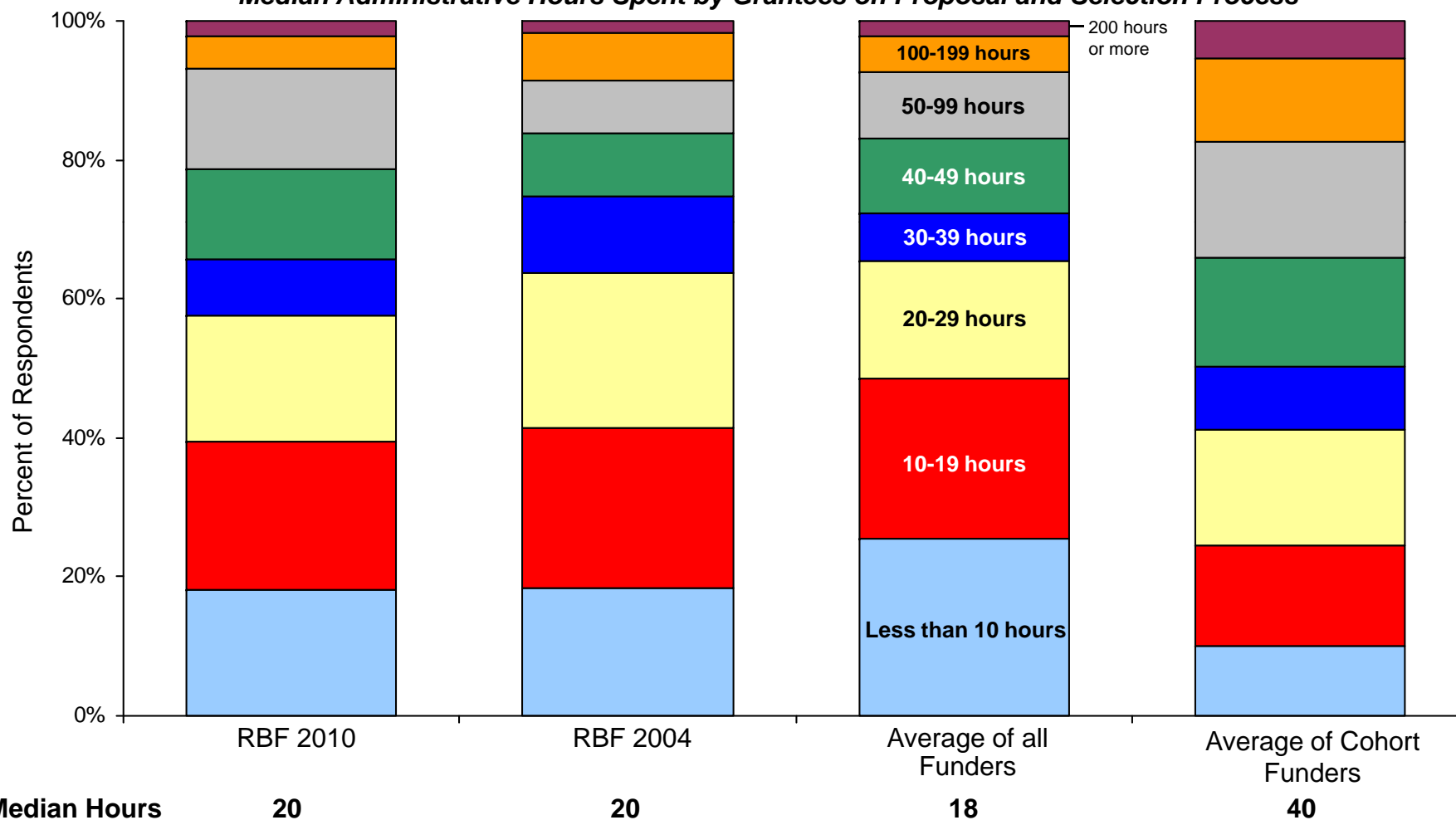
2: Chart displays total grant proposal creation, evaluation, and monitoring hours spent over the life of the grant; each of these events did not necessarily occur for each individual grantee. Chart does not show data from one funder whose median administrative hours exceeds 125 hours.

Administrative Time – Proposal and Selection Process

At the median, the number of hours of administrative time spent by RBF grantees during the selection process is:

- similar to the time spent by grantees of the median funder
- less than the time spent by grantees of all other cohort funders

Median Administrative Hours Spent by Grantees on Proposal and Selection Process

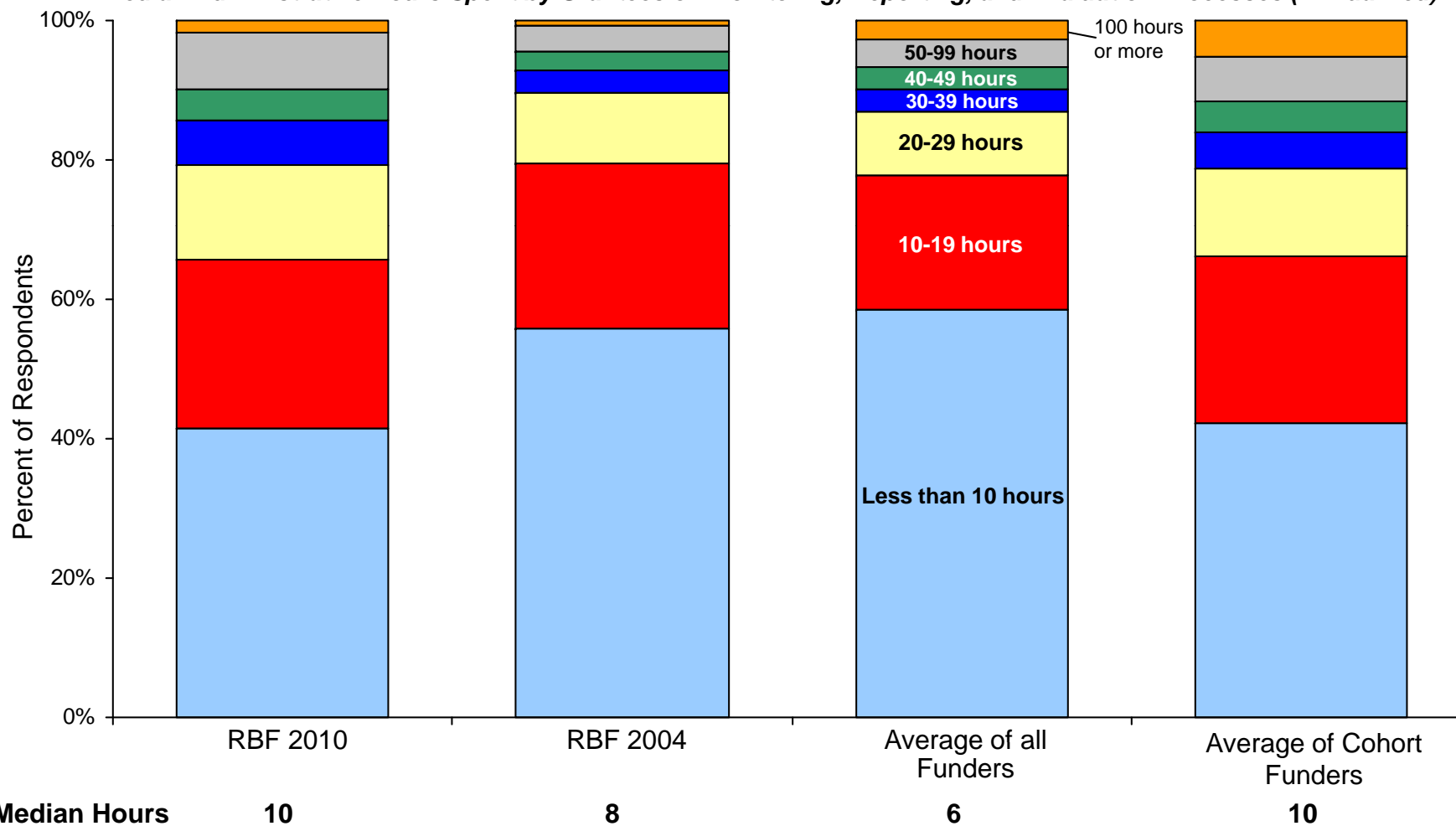


Administrative Time – Reporting and Evaluation Processes

At the median, the number of hours of administrative time spent by RBF grantees per year on the reporting/evaluation process is:

- greater than the time spent by grantees of the median funder
- similar to the time spent by grantees of the median cohort funder

Median Administrative Hours Spent by Grantees on Monitoring, Reporting, and Evaluation Processes (Annualized)¹



¹: "Evaluation" in the survey includes any activity considered by grantees to be part of an evaluation, and does not necessarily correspond to the Fund's definition.

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Non-Monetary Assistance Summary (1)

The non-monetary assistance summary includes the fourteen activities listed below. Provision of assistance patterns fall into the four categories: comprehensive assistance, field-focused assistance, little assistance, and no assistance.

Non-Monetary Assistance Activities Included in Summary	Definitions of Patterns of Assistance
MANAGEMENT ASSISTANCE <ul style="list-style-type: none"> - General management advice - Strategic planning advice - Financial planning/accounting - Development of performance measures 	Comprehensive Assistance Grantees receiving at least 7 forms of assistance
FIELD-RELATED ASSISTANCE <ul style="list-style-type: none"> - Encouraged/facilitated collaboration - Insight and advice on your field - Introductions to leaders in field - Provided research or best practices - Provided seminars/forums/convenings 	Field-Focused Assistance Grantees receiving at least 3 forms of field-related assistance but less than 7 forms of assistance overall
OTHER ASSISTANCE <ul style="list-style-type: none"> - Board development/governance assistance - Information technology assistance - Communications/marketing/publicity assistance - Use of Foundation facilities - Staff/management training 	Little Assistance Grantees receiving at least one form of assistance but not falling into the above categories
	No Assistance Grantees not receiving non-monetary support

Selected Grantee Comments

- ♦ *"I found the communications and marketing training aspect to be pretty useful and impactful on the services we provide."*
- ♦ *"The Foundation's research on the youth organizing field and dissemination of the results has been particularly helpful, in helping us contextualize our own work in the broader landscape and in strengthening the field."*
- ♦ *"It is always clear that RBF views its relationship with a grantee as much more than a financial transaction. In fact, most of the value that RBF gives is non-material: mentoring, networking, brainstorming, etc."*
- ♦ *"As several other longtime funders left the field, RBF's entry and continued funding has helped stabilize the field and strengthen our own organization through tough financial times. More recently, the Pocantico gathering in February generated new ideas, excitement, and solidarity within diverse elements of the reform community."*

Non-Monetary Assistance Summary (2)

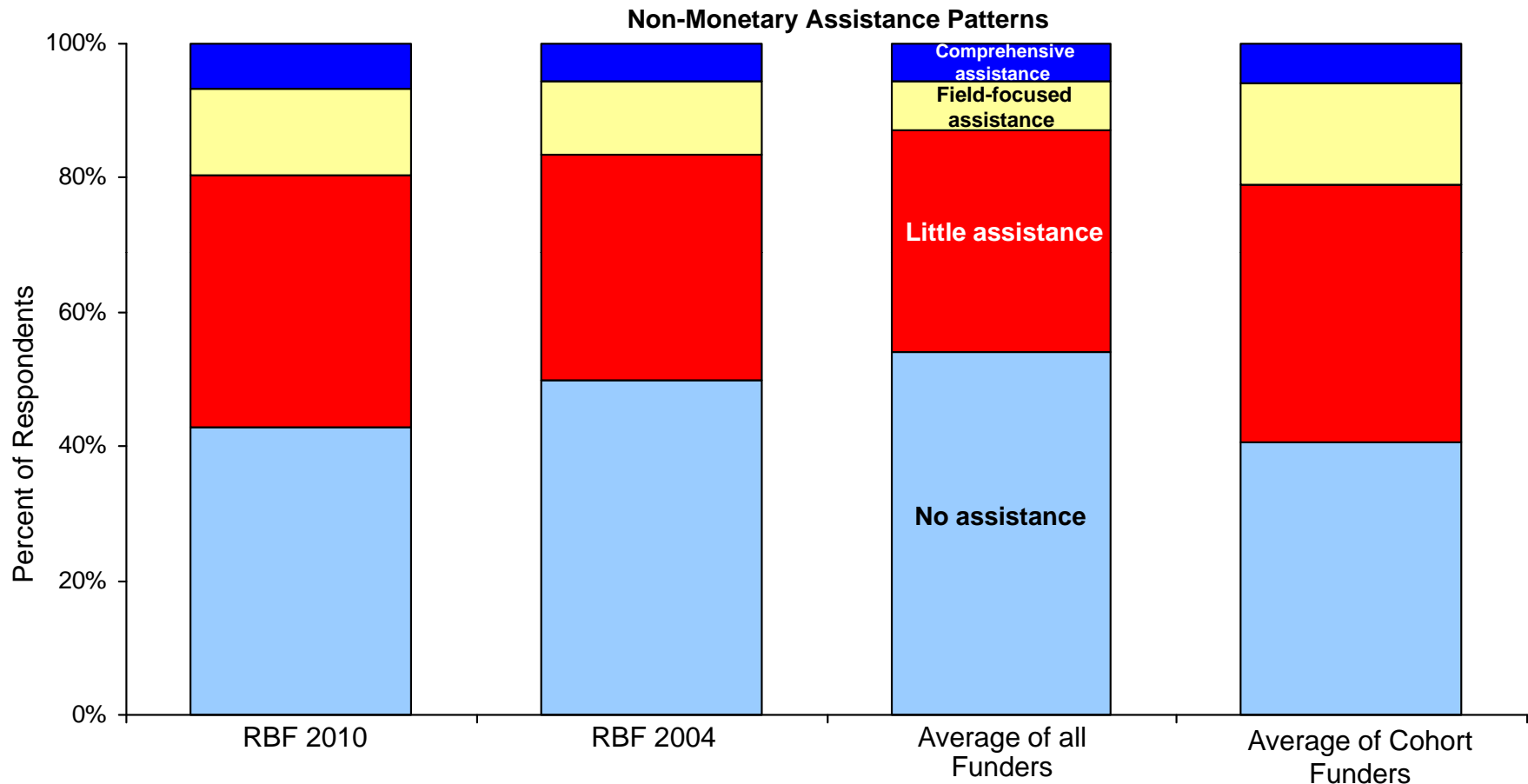
The proportion of RBF grantees that report receiving comprehensive or field-focused assistance is:

- larger than that of the median funder
- similar to that of the median cohort funder

Grantees who receive comprehensive or field-focused assistance rate significantly higher than grantees receiving little or no assistance on many measures throughout the report, including:

- Impact on grantees' fields
- Impact on and understanding of grantees' organization
- Clarity of communication of goals and strategy

Grantees who receive little assistance do not rate significantly differently than grantees receiving no assistance.



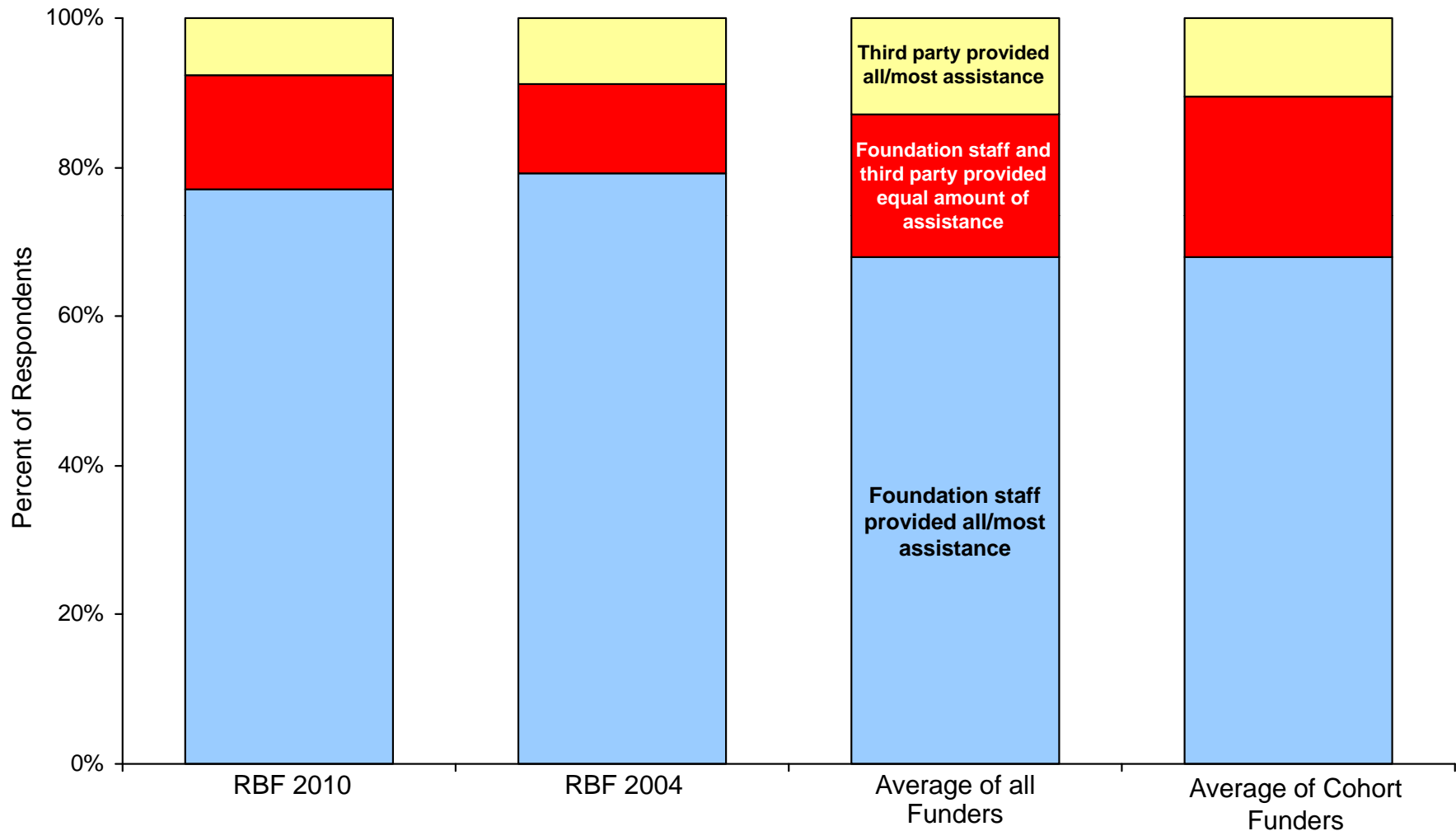
Survey-Wide Analysis Fact: Providing just two or three types of assistance appears to be ineffective; it is only in the minority of cases when grantees receive either a comprehensive set of assistance activities or a set of mainly field-focused types of assistance that they have a substantially more positive and productive experience with their foundation funders than grantees receiving no assistance. For more information on these findings, please see CEP's report, *More than Money: Making a Difference with Assistance Beyond the Grant Check*.

Who Provided Non-Monetary Assistance

The proportion of RBF grantees that report that Foundation staff provided all or most of the assistance they received is:

- larger than that of the average funder
- larger than that of the average cohort funder

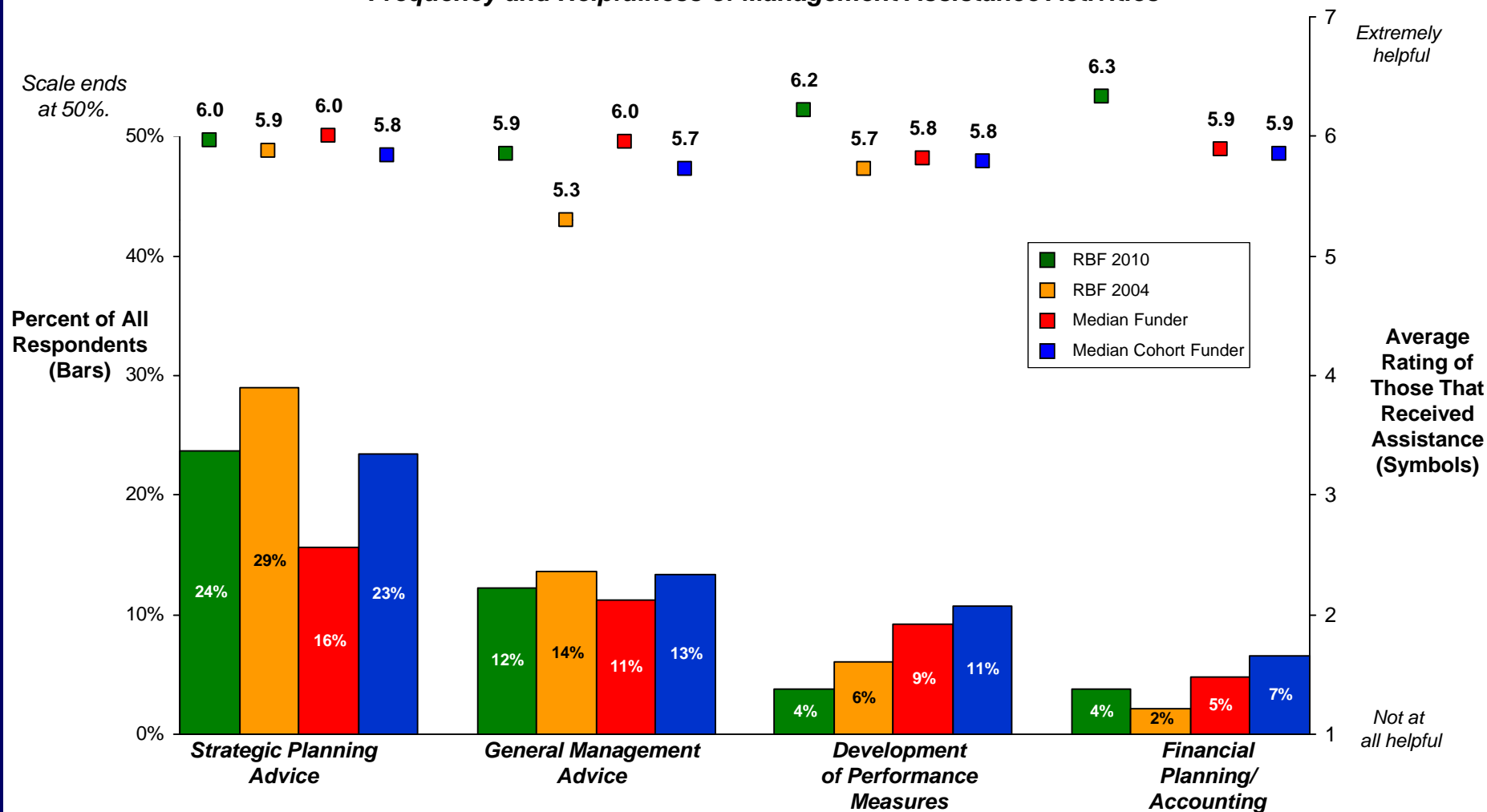
Who Provided Non-Monetary Assistance



Management Assistance Activities & Helpfulness

A larger proportion of RBF grantees report receiving strategic planning advice than grantees of other philanthropic funders, though similar to the median cohort funder.

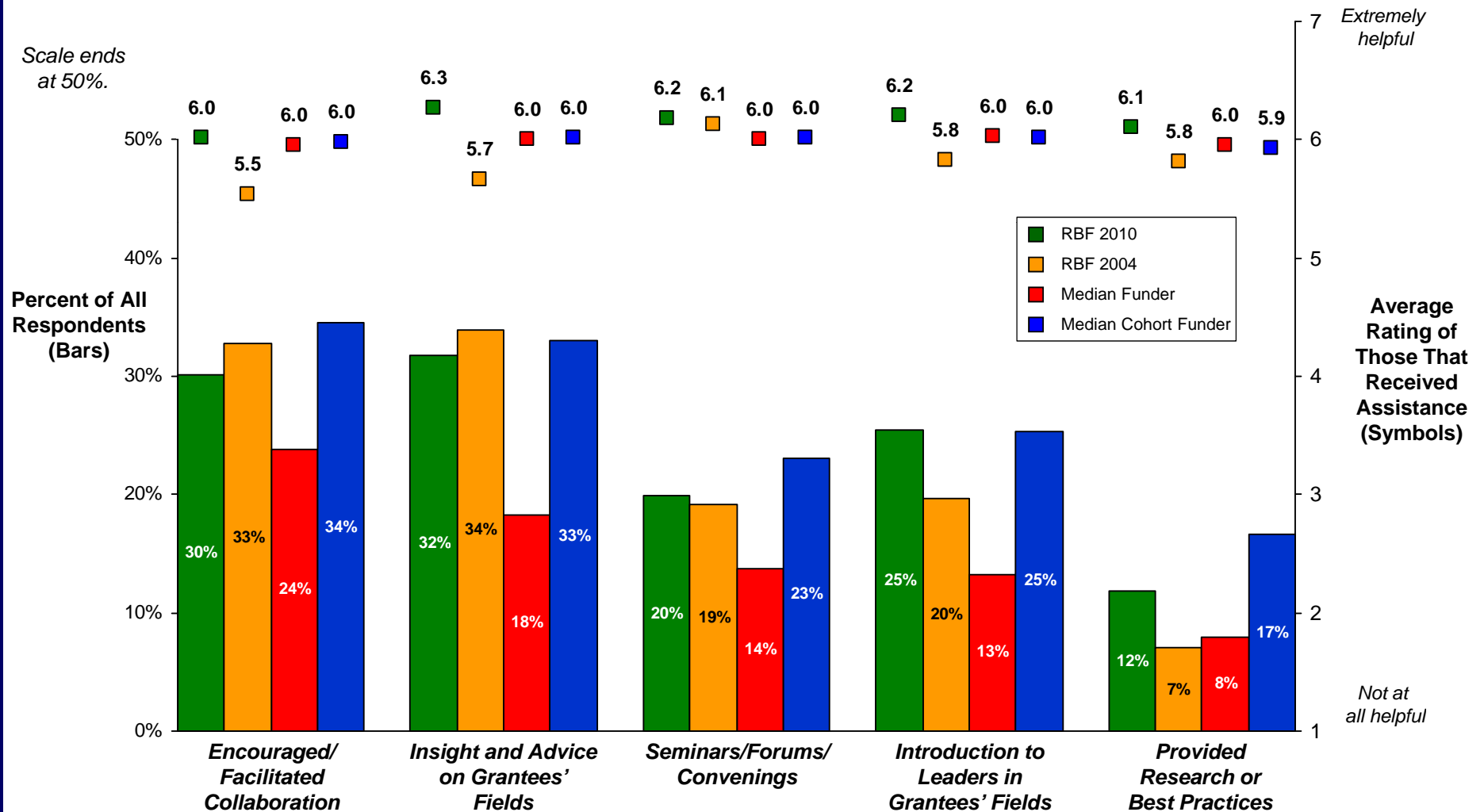
Frequency and Helpfulness of Management Assistance Activities



Field-Related Assistance Activities & Helpfulness

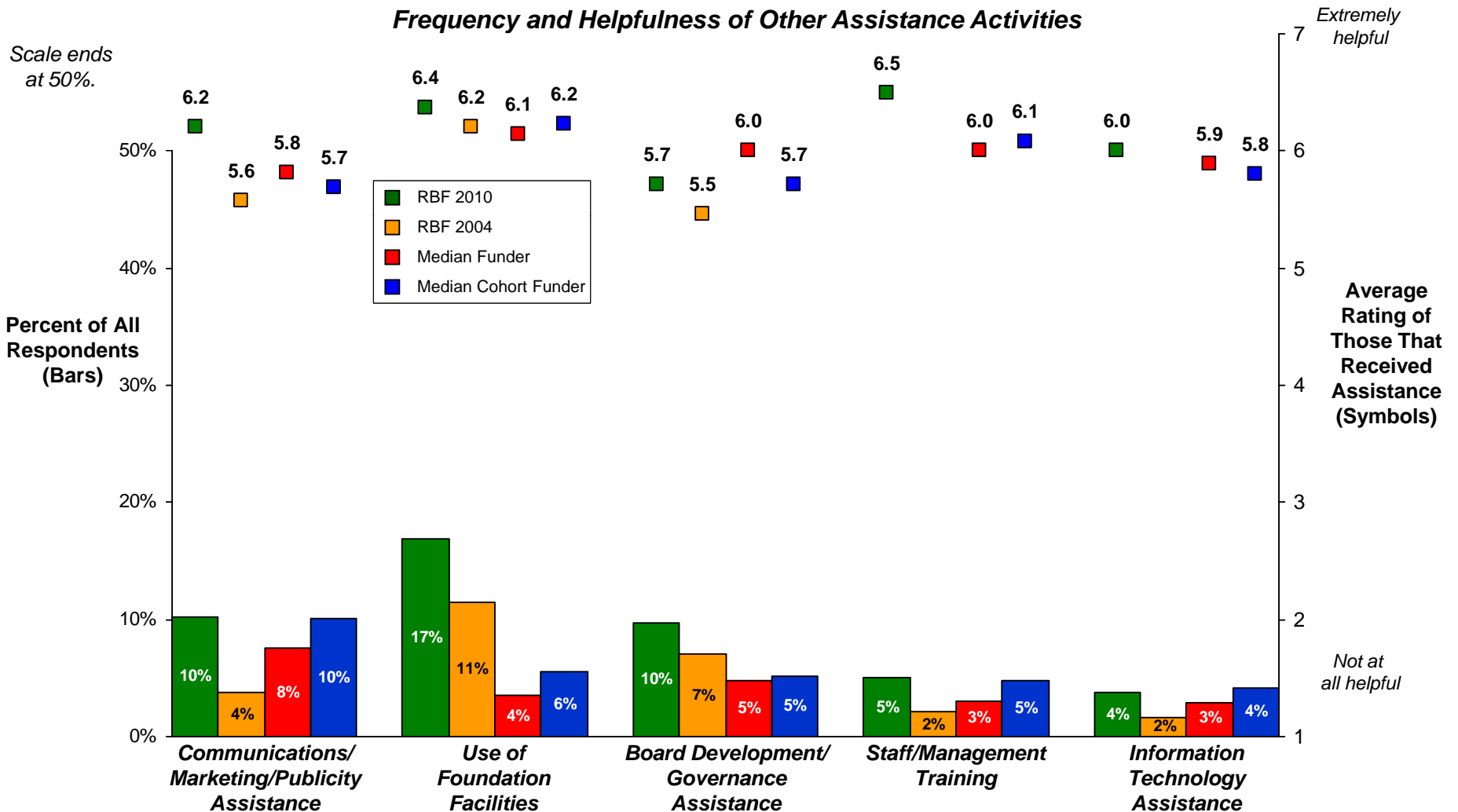
A larger proportion of RBF grantees are provided field-related assistance than is typical, though similar to the median cohort funder.

Frequency and Helpfulness of Field-Related Assistance Activities



Other Support Activities & Helpfulness

RBF provides a larger than typical proportion of grantees with use of Foundation facilities than is typical at the median funder or the median cohort funder.



Note: RBF 2004 helpfulness ratings not shown because fewer than five responses to the question were received.

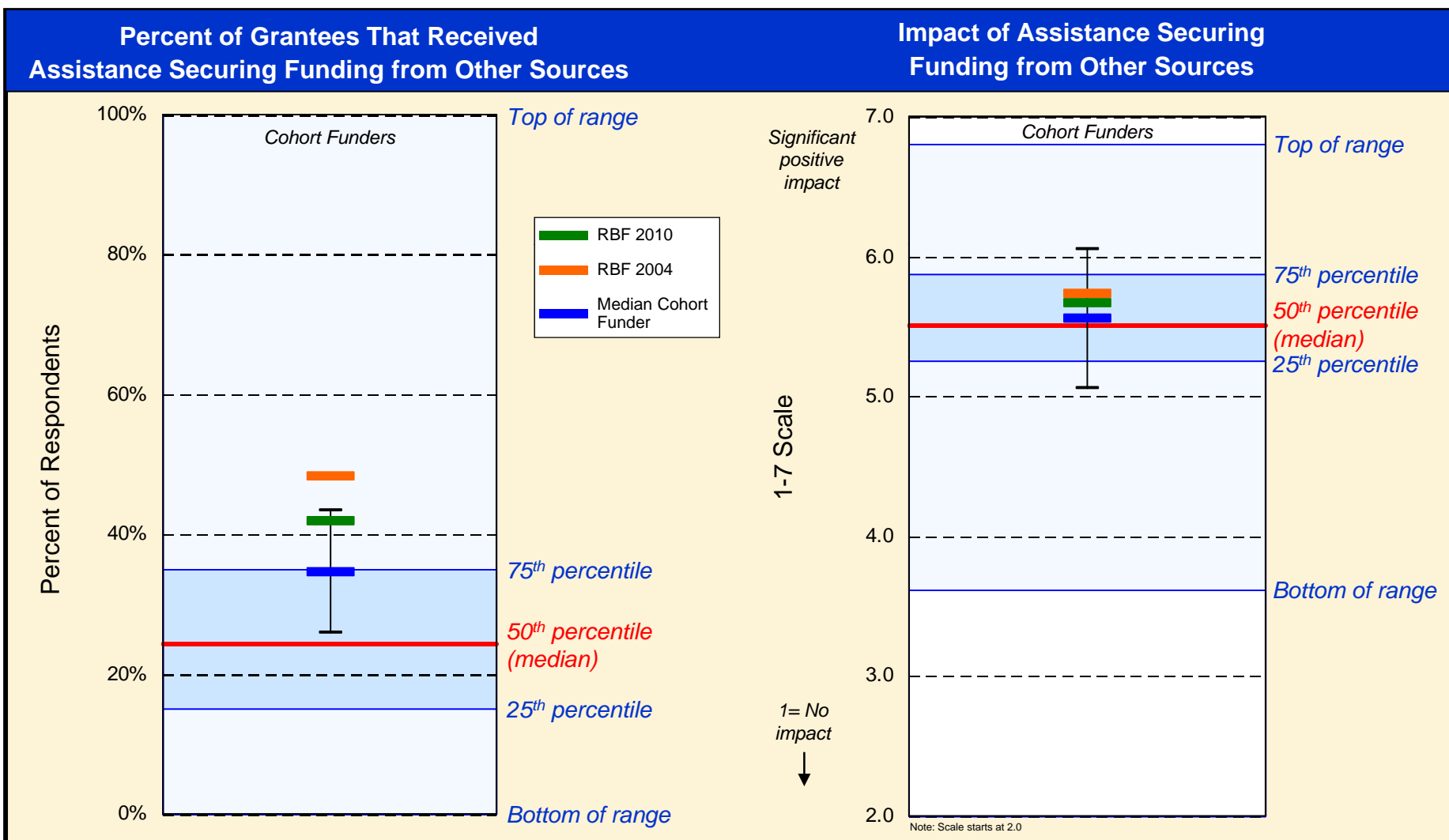
Impact of Assistance Securing Funding from Other Sources

The proportion of RBF grantees receiving active assistance from the Fund in securing funding from other sources is:

- larger than that of the median funder
- larger than that of the median cohort funder

On impact of the Fund's assistance in securing funding from other sources, RBF is rated:

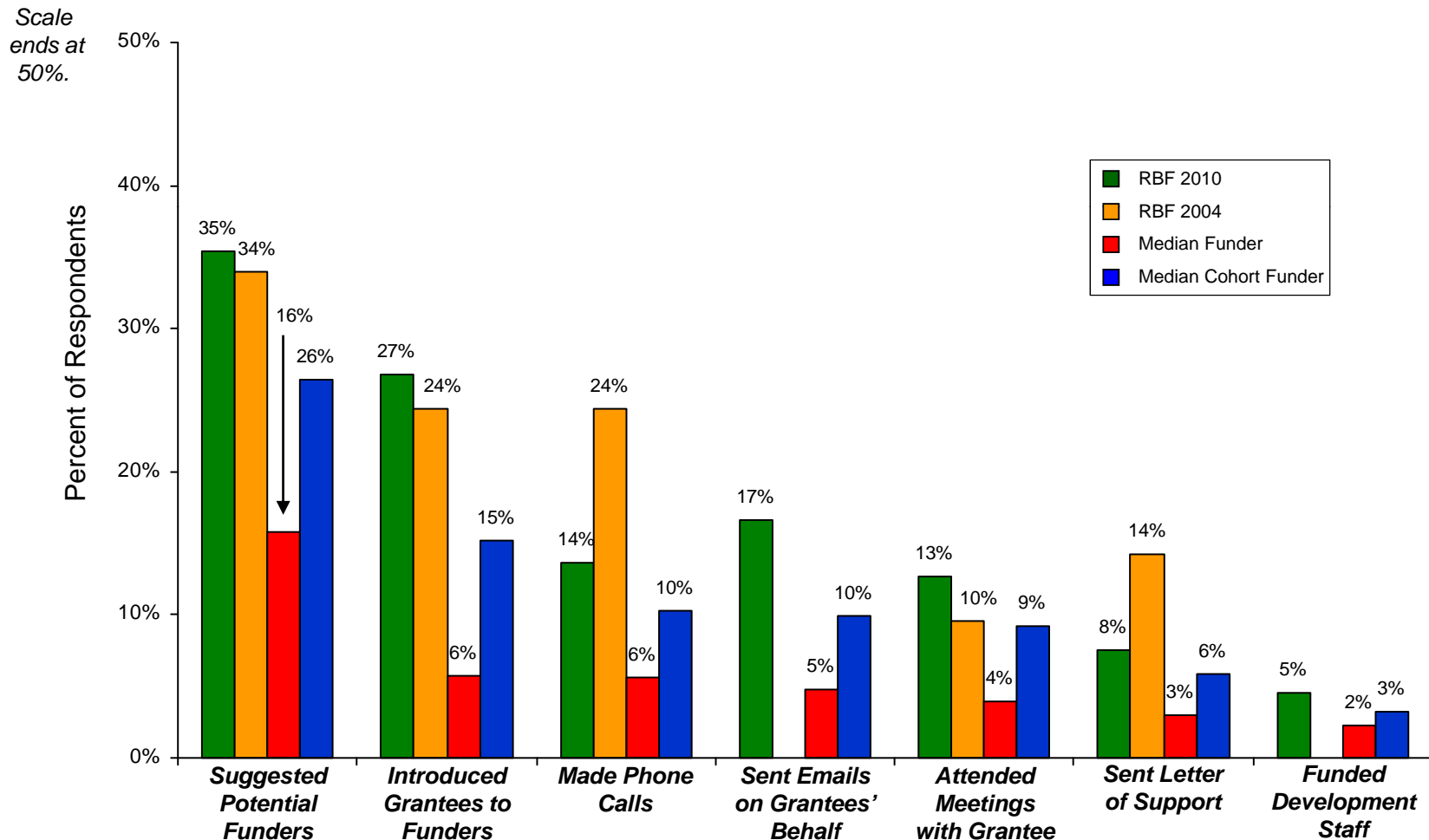
- similarly to the median funder
- similarly to the median cohort funder



Frequency of Assistance Securing Funding from Other Sources

RBF grantees report receiving more assistance securing funding from other sources from the Fund than is typical at the median funder or the median cohort funder.

Activities Provided by the Funder to Assist in Obtaining Funding From Other Sources

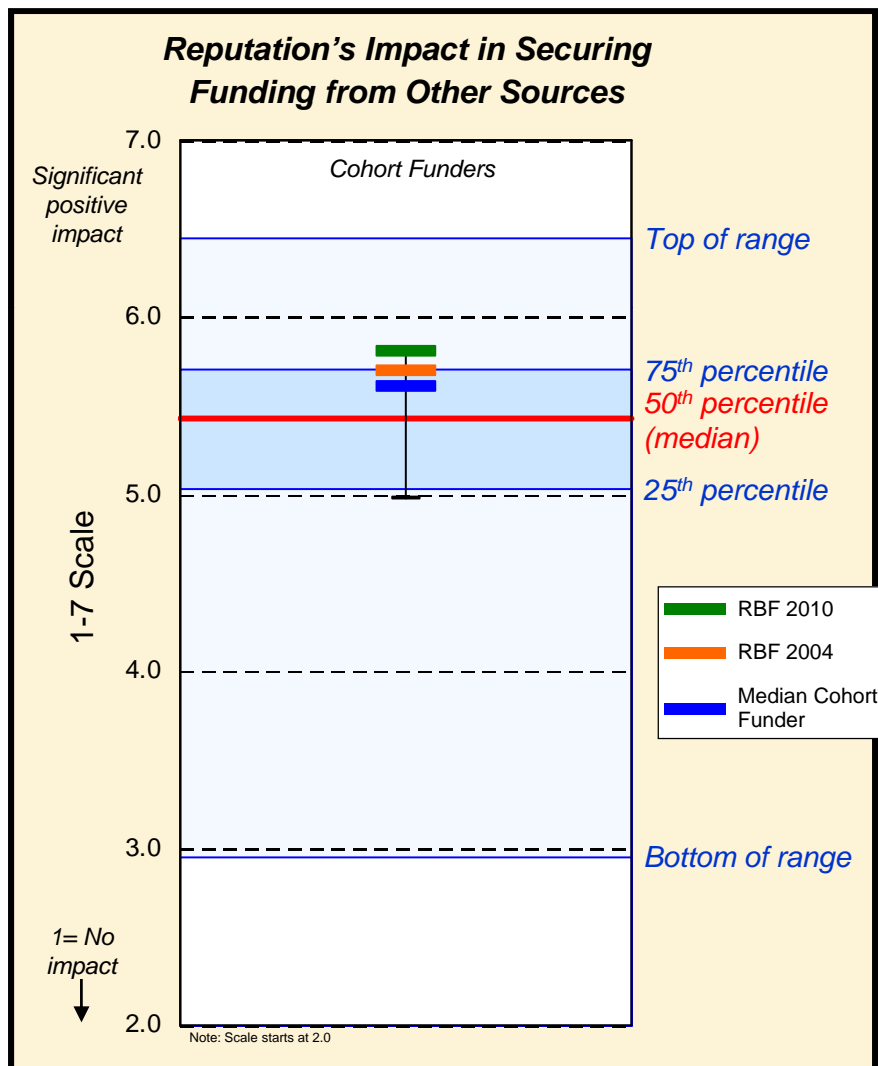


Note: RBF 2004 data on "sent emails on grantees' behalf" and "funded development staff" data not available due to changes to the survey instrument.

Impact of Reputation

On impact of the Fund's reputation on grantees' ability to secure funding from other sources, RBF is rated:

- above the median funder
- higher than all other cohort funders



Selected Grantee Comments

- ♦ “We can say confidently that RBF’s support enabled us to raise our organization’s profile and network with national stakeholders on college campuses, in government agencies, and international agencies.”
- ♦ “...the Foundation’s support allowed us to leverage support from an expanded community of individual donors and private foundations.”
- ♦ “Their support - and the credibility RBF support lends to a project - has been instrumental in launching important programs.”

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Racial Diversity

Measure	RBF 2010				Full Dataset Median			
Foundation Communication Related to Racial Diversity								
Has the Foundation communicated with you about racial diversity related to:	Yes	No, but not relevant	No, but Foundation should	Don't know	Yes	No, but not relevant	No, but Foundation should	Don't know
The Foundation itself (staff, board, etc.)	8%	46%	13%	33%	13%	43%	16%	28%
The Foundation's programmatic work (funding, mission, programs)	32%	28%	15%	25%	34%	26%	17%	23%
The grantee's organization (staff, board, etc.)	24%	36%	16%	24%	22%	39%	14%	25%
The work associated with this grant in particular	29%	37%	13%	21%	29%	35%	12%	24%
Impact of Communication Related to Racial Diversity (only asked of grantees who indicated 'yes' to the relevant question above)								
Impact of communication on grantee's organization (1="Negative impact", 4="Neither positive nor negative impact", and 7="Positive impact")	5.0				5.0			
Impact of communication on grantee's work (1="Negative impact", 4="Neither positive nor negative impact", and 7="Positive impact")	5.3				5.2			
Relevance of Racial Diversity to Funded Work								
Percent of grantees who indicate that the work funded by this grant addresses topics in which racial diversity is a relevant component	57%				56%			

Race/Ethnicity of Respondents

Measure	RBF 2010	Full Dataset Median	Cohort Funder Median
Race/Ethnicity of Respondents¹			
Caucasian/White	80%	80%	79%
African-American/Black	4%	7%	4%
Hispanic/Latino	5%	4%	6%
Asian (incl. Indian subcontinent)	2%	3%	5%
Multi-racial	4%	3%	3%
American Indian/Alaskan Native	1%	1%	0%
Pacific Islander	1%	0%	0%
Other	3%	2%	3%

U.S. based RBF grantees who responded “Caucasian/White” rate significantly higher than grantees of other races and ethnicities on:

- Understanding of grantees’ fields
- Advancing knowledge in grantees’ fields
- Effect on public policy in grantees’ fields
- Understanding of grantees’ local communities
- Impact on and understanding of grantees’ organization
- Clarity of communication of goals and strategy
- Fairness of treatment
- Helpfulness of the selection process in strengthening their own organizations

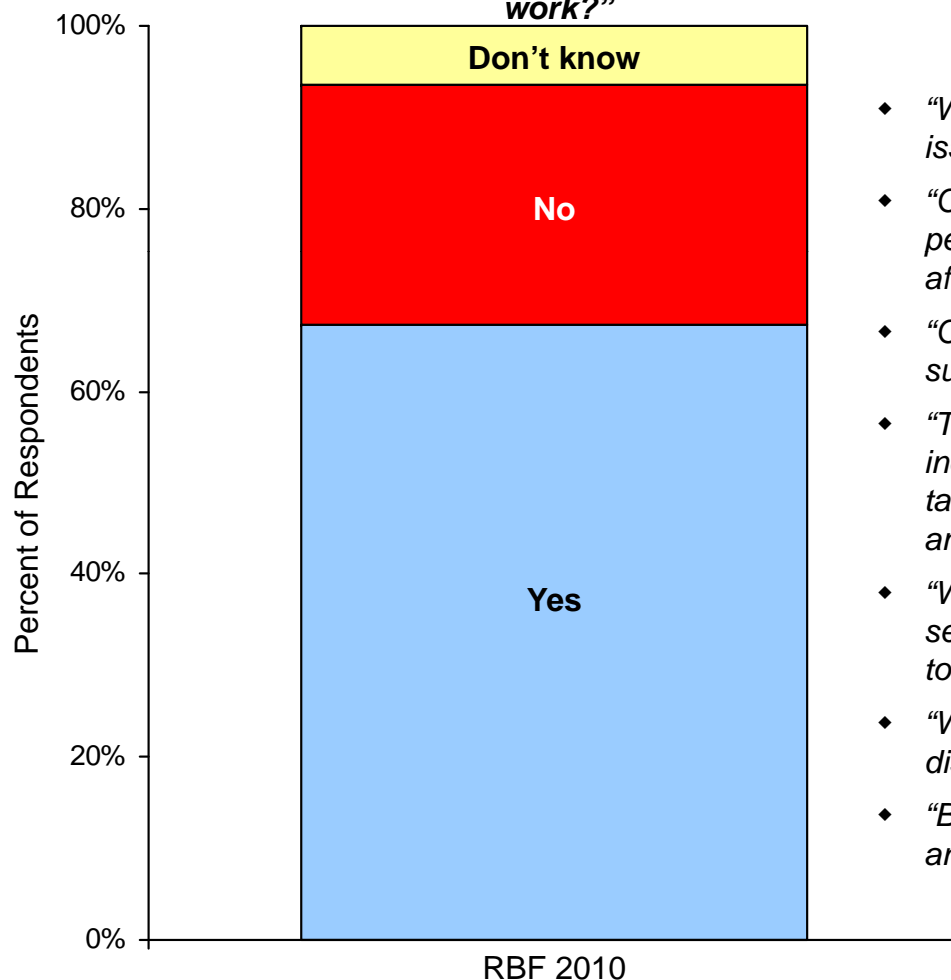
1: In Spring of 2009 CEP removed the word “optional” from this question but added a “prefer not to say” response choice. Previously this question was only infrequently skipped and so we have maintained comparative data in spite of the question change. In response to this question, a total of 10 percent of RBF 2010 respondents selected “prefer not to say,” compared to 5 percent at the median funder.

Note: RBF 2004 data not available due to changes to the survey instrument.

Address Diversity in Programmatic Work

When asked to indicate whether or not grantee organizations explicitly address diversity in their programmatic work, 67 percent of grantees responded yes.

“Does your organization explicitly address diversity in your programmatic work?”



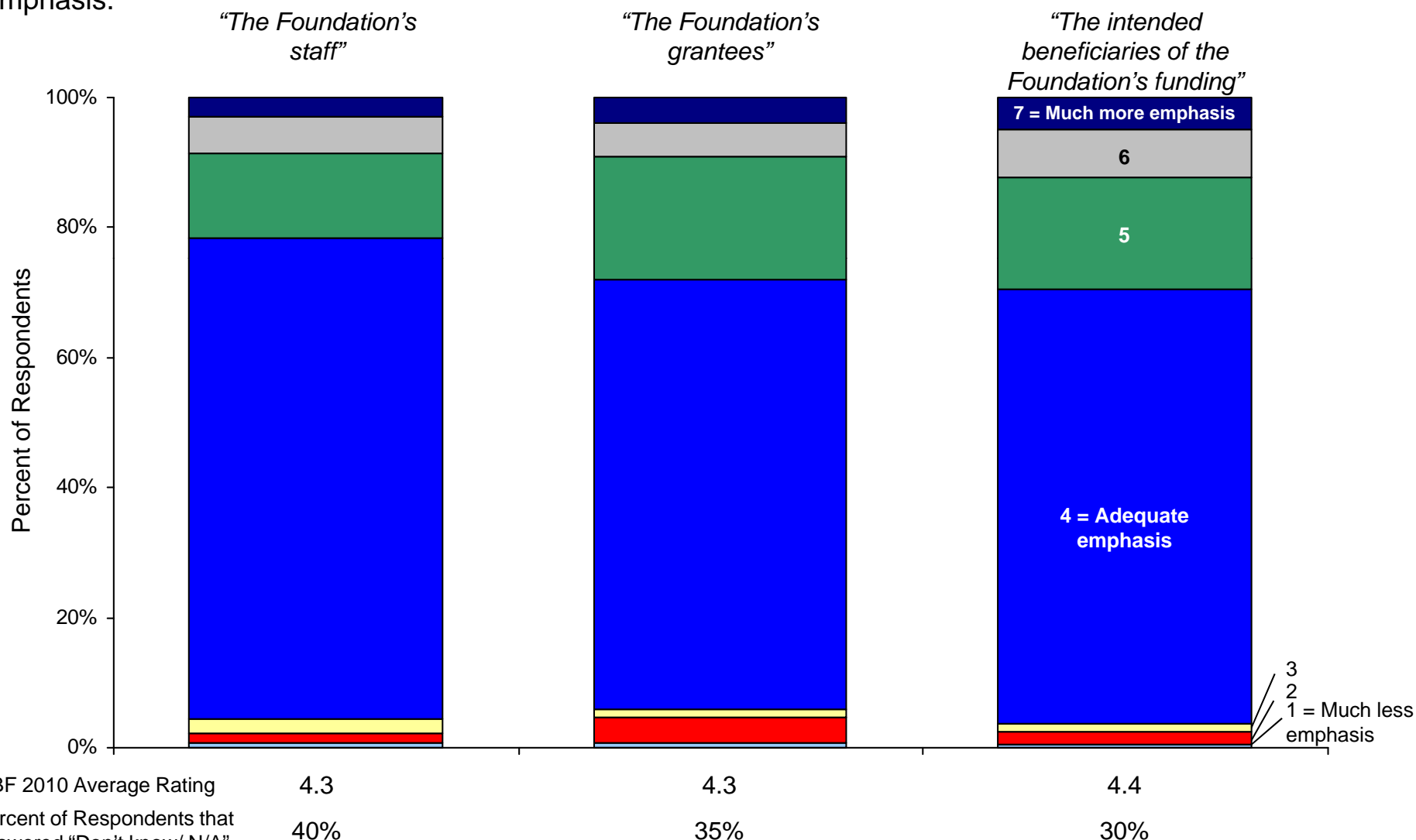
Selected Grantee Comments

- ♦ *“We are a racial justice organization, committed to working on issues critical to communities of color.”*
- ♦ *“Our program work involves low-income people, particularly people of color, in changing the policies and programs that affect their lives.”*
- ♦ *“Our programs reflect the cultural and ethnic diversity of our surrounding community and its residents.”*
- ♦ *“The most appropriate word may not be diversity but inclusiveness. We seek inclusion of the poorest and those targeted or affected by our programs. We seek inclusiveness among our stakeholders and partners.”*
- ♦ *“We ensure that there is no discrimination of any kind; and we seek individuals from a wide variety of backgrounds, relating to all the elements of ‘diversity,’ in our hiring practices.”*
- ♦ *“We target groups that are particularly marginalized or discriminated against.”*
- ♦ *“Both our substantive area and the make up of our leadership and our stakeholders represent diversity in multiple ways.”*

Note: Comparative data not available because this question was only asked of RBF grantees.

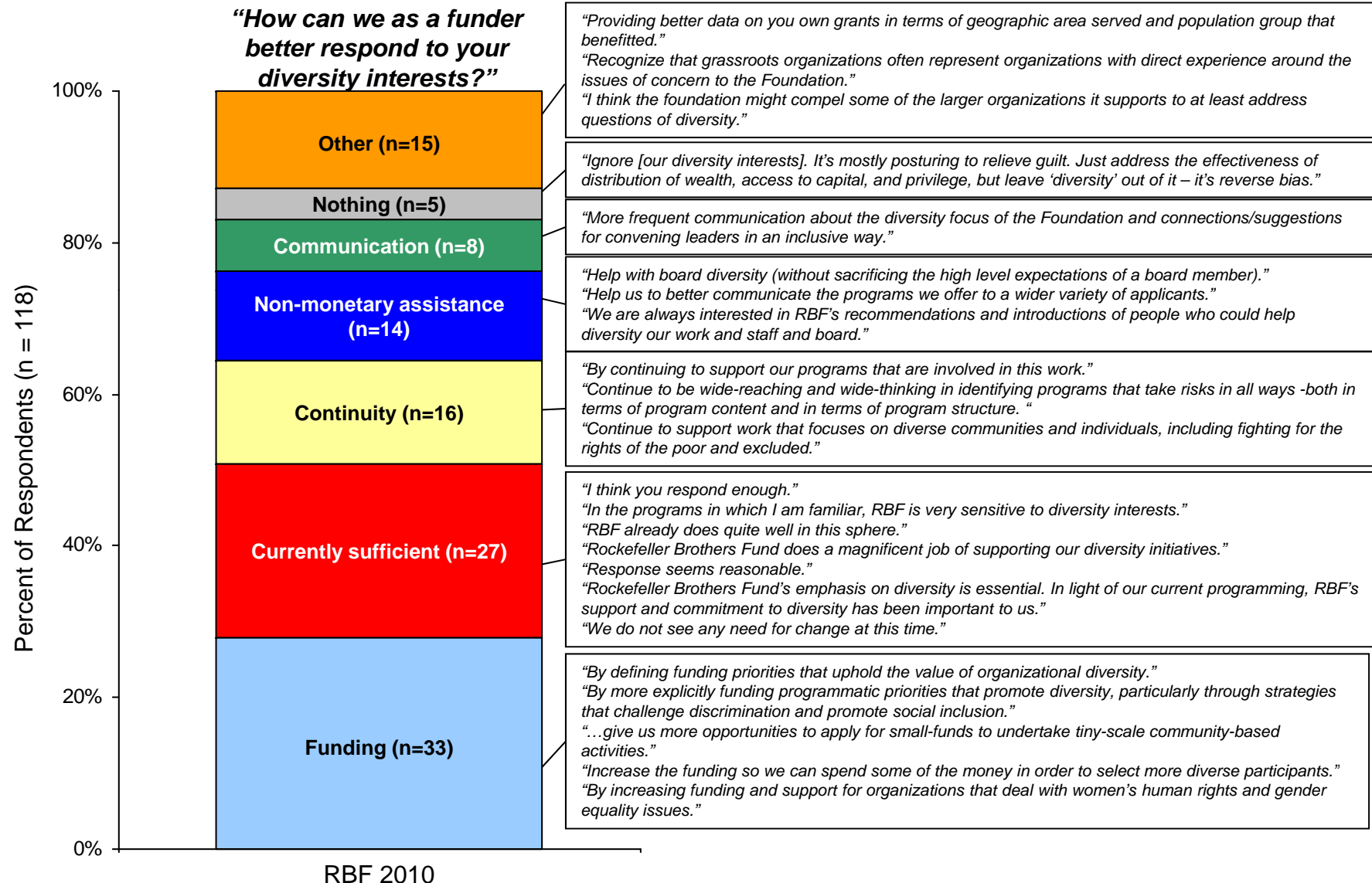
Emphasis on Diversity

RBF grantees were asked if the Foundation should place more, less, or the same amount of emphasis on diversity in the Foundation's staff, the Foundation's grantees, and the intended beneficiaries of the Foundation's funding, with 1 = "Much less emphasis," 4 = "Adequate emphasis," and 7 = "Much more emphasis."



RBF Response to Grantee Diversity Interests

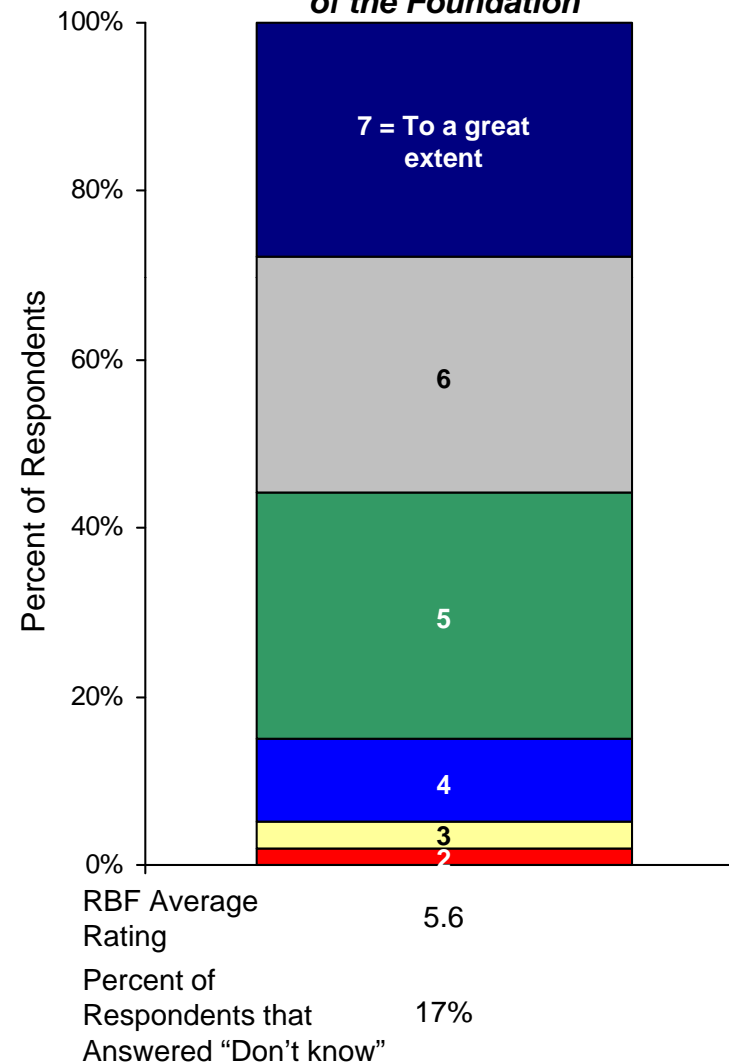
RBF grantees were asked, “How can we as a funder better respond to your diversity interests?” The most common response was related to funding.



Wide Array of Expertise and Ideas

RBF grantees were asked to rate the extent to which RBF ensures a wide array of expertise and ideas shape the work of the Fund, with 1 = “Not at all ” and 7 = “To a great extent.” Fifty-six percent of grantees rated a 6 or a 7.

Extent to which the RBF ensures a wide array of expertise and ideas shape the work of the Foundation

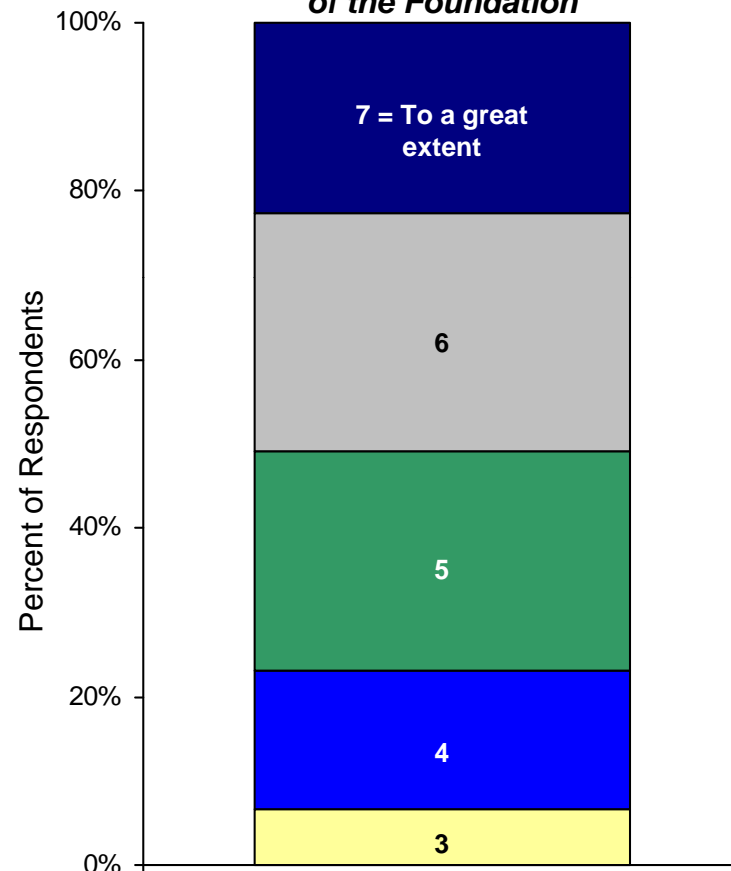


Note: No comparative data is available because the question was only asked of RBF grantees.

Wide Array of Cultures and People

RBF grantees were asked to rate the extent to which RBF ensures a wide array of cultures and people shape the work of the Fund, with 1 = “Not at all ” and 7 = “To a great extent.” Fifty-one percent of grantees rated a 6 or 7.

Extent to which the RBF ensures a wide array of cultures and people shape the work of the Foundation



RBF 2010
Average Rating 5.4
Percent of
Respondents that
Answered “Don’t know” 23%

Note: No comparative data is available because the question was only asked of RBF grantees.

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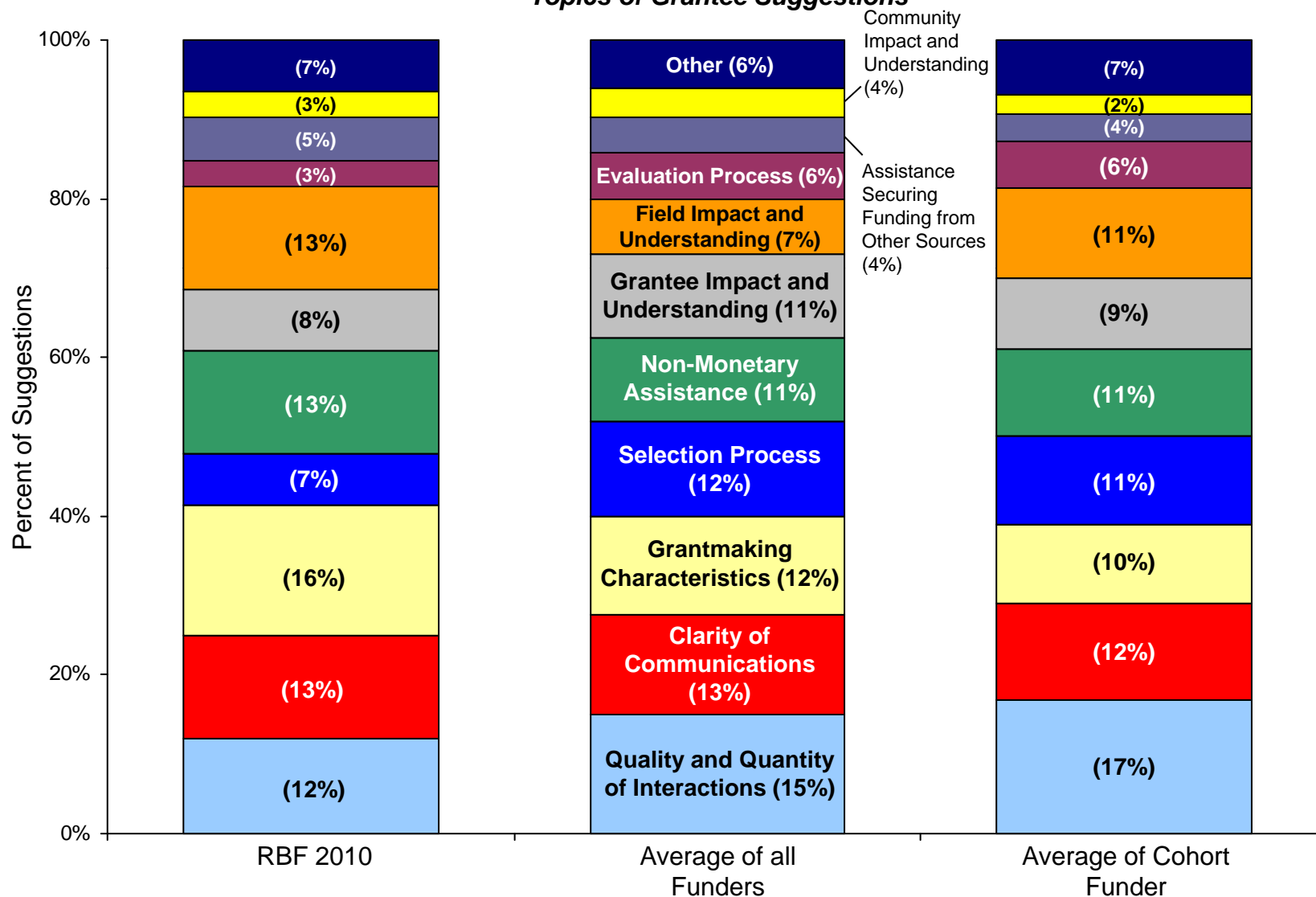
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Grantee Suggestions for the Fund (1)

Grantees were asked to provide any suggestions for how the Foundation could improve. A larger than typical proportion of RBF's suggestions concern grantmaking characteristics, non-monetary assistance, and field impact and understanding.

Topics of Grantee Suggestions



Note: Proportions may not sum to 100 percent due to rounding. There were a total of 94 grantee suggestions for RBF. RBF 2004 data not available due to changes to the survey instrument.

Grantee Suggestions for the Fund (2)

% Grantee Suggestions		RBF Grantee Suggestions
Topic of Grantee Suggestion	RBF	Sub-Themes and Sample of Comments
Grantmaking Characteristics	16%	Grant Length, Type, and Size (n = 11) “These are difficult times. The Fund should be dipping into its corpus to INCREASE giving, rather than cutting back. This is pivotal to maintaining the momentum the Fund’s grantees have established.” “...the only suggestion I can come up with is to make more multi-year grants.” “For the conduct of research, it would be helpful if the Foundation were able to make longer term commitments.” “Multi-year, general support grants to trusted grantees are always appreciated. I know the RBF program officers want to do this but have been a bit hampered by fiscal policies set by the Board; this hurts grantees who need to be able to count on long-term support that is not tied to legislative whims.”
		Grantmaking Policies (n = 4) “We hope to be able to have an opportunity to seek funding in 2010 as we have not been able to do so since 2008.” “I’m pressed to think of any improvements (those that don’t revolve around getting rid of the 3 year waiting period before applying again, that is).”
Clarity of Communication	13%	Consistency and Clarity of Communication (n = 5) “Consistency between practice and website.” “Staff needs to communicate funding directions and priorities. That is not happening, at least in the last few years.”
		More Frequent Communication (n = 5) “...more frequent communication to align expectations.” “More proactive communication with grantee.”
		Communication Resources (n = 2) “A better design of website would improve the PR of Foundation.”
Non-monetary Assistance	13%	More Grantee Convenings (n = 7) “...initiate meetings among grantees who are working on similar projects.” “Getting to know the other grantees may be a positive thing in better understanding the Foundation as a whole.” “RBF might want to convene grantees in common program areas to facilitate knowledge management.”
		Other (n = 5) “Begin offering board retreats and space for board and staff retreats.”

Grantee Suggestions for the Fund (3)

% Grantee Suggestions		RBF Grantee Suggestions
Topic of Grantee Suggestion	RBF	Sub-Themes and Sample of Comments
Field Impact and Understanding	13%	Field Focus (n = 7) "Consider deeper level of collaboration with the field." "We would encourage the Foundation to support even more new and innovative youth and leadership development programs as finances permit. This is a field that is ripe for expansion." "By widening the scope of support, which means the increase in the number of areas they provide grants for."
		Other (n = 5) "Evaluate the cumulative effect in the Western Balkans as a pivotal place more often." "Take risks rather than striving for perfect and illusory big impacts."
Quality and Quantity of Interactions	12%	"I guess it is a bit intimidating for us to pick up the phone and say, 'thanks for the support but we're in over our heads.' I am not sure how we would be received, so I am delaying making the call. The Foundation funded us before we were ready, which is a great problem to face, but now we have no communication and are struggling." "Perhaps more interaction during the grant period to ascertain how we are performing vis-a-vis RBF evolving goals and needs." "Program officers seem to want to be activists more than program officers. Often help to shape program and this is not very helpful." "I wish our program officer or someone affiliated with the RBF were able to engage with our programs with at least once a year."
Grantee Impact and Understanding	8%	"Support our staff development including the leaders." "Leaving key positions unfilled is quite problematic for a grantee for whom the Foundation grant forms a significant portion of its funding. It created a very long gap during which funding seemed to be intended but could not happen."
Selection Process	7%	"The only thing that I can think of is that the details of the fund-seeking process could be a bit clearer – for example, how, exactly, do you apply for a 2nd grant? What should your proposal include? That sort of thing." "Clearer guidelines for what they hope to support in the arts in New York City." "In [the] future it would help to put more distinct time limits on the grant process. From first contact it took more than 24 months to receive an initial grant. After gaining a small grant for initial work it was very difficult to arrange follow up."

Grantee Suggestions for the Fund (4)

% Grantee Suggestions		RBF Grantee Suggestions
Topic of Grantee Suggestion	RBF	Sub-Themes and Sample of Comments
Assistance Securing Funding from Other Sources	5%	<p>"Our experience of the Foundation was that it was very hands-off. This was both good and bad. Good because they trusted us to do what we said we were going to do in our grant proposal without micro-managing us; bad because we didn't have the opportunity to work with them to leverage our funding from them to secure other funding."</p> <p>"...It's hard on us to be told that the funding is finished – as they know that it's extremely difficult to raise money these days – even for the best programs. We had hoped the Foundation would steer us toward other funders but we were told that they can't come up with any suggestions...."</p>
Community Impact and Understanding	3%	<p>"Invest in the capacity development of local people to sustain local solutions based on local priorities."</p> <p>"I would say that the Foundation should support more NGOs which aim to improve the legal environment for NGOs, especially in the field of philanthropy and endowments. Up to today, our country has very few laws regulating the field of NGOs, and this poses risk for their future sustainability."</p>
Evaluation	3%	<p>"Decrease bureaucracy and reporting requirements."</p> <p>"Timely acknowledgement of reports submitted (sometimes after working hard on a report, you submit it and do not hear back from them). Feedback would be critical."</p>
Other	7%	<p>"The Foundation could increase its local staff."</p> <p>"I'd love to see more emphasis on the media – it is so important in shaping public perceptions and hence politics, culture, and the ways we live."</p>

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Review of Findings

Chart shows the percentile rank of RBF 2010 (◆), RBF 2004 (◇), and the median cohort funder (◆) among all funders in the comparative set.

Indicator		Percentile Rank on Indicator					Description of Indicator
		0th	25th	50th	75th	100th	
Impact on the Field			◇		◆ ◆		Grantees were asked to rate the funder's impact on their fields.
Impact on the Community		◆ ◆ ◆					Grantees were asked to rate the funder's impact on their local communities.
Impact on the Grantee Organization				◇ ◆	◆		Grantees were asked to rate the funder's impact on their organizations.
Satisfaction				◆ ◆ ◆			Grantees were asked to rate their satisfaction with their funder.
Quality of Interactions				◆ ◆	◆		This summary includes grantee ratings of funder fairness, responsiveness, and grantee comfort approaching the funder if a problem arises.
Clarity of Communication of Goals and Strategy			◆ ◆				Grantees were asked to rate the clarity of the funder's communication of its goals and strategy.
Selection Process				◆ ◆	◆		Grantees were asked to rate the helpfulness of the funder's selection process for their organizations.
Reporting and Evaluation Processes ¹			◆	◆			Grantees were asked to rate the helpfulness of the funder's reporting and evaluation processes for their organizations.
Dollar Return on Grantee Administrative Hours			◆ ◆		◆		This summary is the calculation of number of dollars received divided by the time required of grantees to fulfill the funder's administrative requirements.
Percent Receiving Field or Comprehensive Non-Monetary Assistance				◇	◆		The funder's percentile rank on the proportion of grantees receiving higher impact field-focused or comprehensive assistance.
Assistance Securing Funding from Other Sources	% Receiving				◆ ◆	◇	The funder's percentile rank on the proportion of grantees receiving assistance securing funding from other sources.
	Impact			◆ ◆ ◆			Grantees were asked to rate the impact of the funder's assistance securing funding from other sources.

RBF 2010 overlaps the median cohort funder.

Analysis and Discussion (1)

Positive and Improved Perceptions of the RBF's Impact on Grantees' Fields and Organizations

- ♦ Compared to its 2004 grantee survey results, in 2010, the Fund is rated significantly higher for its impact on grantees' fields.
 - The Fund is rated more positively than typical for its understanding of grantees' fields, its ability to advance knowledge in their fields and for the RBF's effect on public policy. One grantee notes, "RBF is not as large as others but is more focused and more collaborative in getting change."
- ♦ The RBF is also rated more positively than in 2004 for its impact on grantees' organizations. The Fund is rated more positively than 75 percent of funders and higher than all other cohort funders for its understanding of grantees' goals and strategy – a key predictor of strong funder-grantee relationships according to CEP's latest research publication, *Working with Grantees*.
 - Even with these high ratings, grantees more frequently than typical suggest changes to grantmaking characteristics as a potential area of improvement – especially around issues of grant length.
 - On average the grant length reported by RBF grantees is shorter than typical and shorter than it was in 2004. Although the RBF gives larger grants than is typical and awards slightly more general operating support than the median funder, CEP's research suggests that all three grant characteristics – size, duration, and type – matter together. It's mostly when larger grants, like those made frequently by the RBF, are combined with multi-year timeframes and operating support that the grantee experience and a funder's impact on a grantee are fundamentally more positive.
 - Some grantees also suggested ending the "three year waiting period before applying again."
 - » *What are the specific policies and procedures the Fund has implemented since 2004 that may have led to this increase in ratings despite decreasing grant duration? What steps can the Fund take to continue to ensure these changes are maintained even as the Fund continue to evolve?*
 - » *Can the Fund review its grantmaking policies – particularly in terms of multi-year grants and the proportion of grantees receiving general operating support – paying special attention to opportunities to think about combining operating support and multi-year support?*

Analysis and Discussion (2)

Some Lack of Clarity and Consistency of Communication of Goals and Strategy

- ♦ RBF is rated below the median funder for the clarity of its communication of goals and strategy and for the consistency of its communication resources, both personal and written communication¹.
- ♦ The Fund's rating on clarity of communication has not changed since 2004 and on average, grantees across most program areas, rate below the median funder on this measure.
 - A larger than typical proportion of RBF grantees report interacting with the Foundation monthly or more often and those grantees rate significantly higher than grantees who interact with the RBF less often for the clarity with which the Fund communicates its goals and strategy as well as on the consistency of communication resources. A larger than typical proportion of RBF grantees also report that they most frequently initiate interactions with the Fund, and these grantees rate significantly lower than other grantees on many measures throughout the report including clarity of communication of goals and strategy and consistency of communication resources.
 - Frequency of interaction and initiation of interaction varies widely across program areas.
- ♦ One of the most frequently mentioned suggestions grantees make for the RBF is improving the clarity of communication about the Fund's goals and strategies. Grantees seek more frequent communication about the Fund's strategies and their evolution and more consistent communication from the Foundation generally. Comments suggest that issues around clarity are not solely about the specificity of strategies but also contain an internal component: Some grantees comment that it is difficult to discern what is "personal opinion or RBF policy" and other grantees mention that "the board is blamed [by program staff] for dithering and indecision."
- ♦ Grantees also mention the discrepancy between personal communication and various written communications from the Foundation. One grantee explains, "...interaction with [my program officer] has helped us clarify our strategy...On the other hand, the website has just barely been helpful..." Another grantee comments that, "...working with Foundation staff is always productive and effective...[but] we found written guidelines too brief and vague and needed more nuanced understanding of the Foundation's goals in our area."
 - » *Can the Fund audit its communication resources – both its written documents such as funding guidelines and website as well as what is often said in personal communications from program officers and other staff – to ensure consistency across all types of communication?*
 - » *Given the recent and likely future evolution in program areas and grantmaking priorities, do RBF staff have clear guidance about communicating to grantees about how they fit or do not fit within the Foundation's current work?*

Analysis and Discussion (3)

Building on Strengths in Provision of Non-Monetary Assistance

- ♦ RBF gives more non-monetary assistance than typical, and a larger than typical proportion of grantees receive comprehensive and field-focused nonmonetary assistance than the typical funder.
- ♦ Consistent with CEP's field wide research published in *More than Money*, the Fund's grantees who receive comprehensive or field-focused nonmonetary assistance rate significantly higher throughout the report on a variety of measures including for the Fund's impact on grantees fields, grantees' overall satisfaction, and the Fund's clarity of communication of its goals and strategy.
 - Approximately 37 percent of RBF grantees report receiving a pattern of little nonmonetary assistance (receiving at least one type of assistance but not enough assistance to fall into the more concentrated patterns of comprehensive or field-focused assistance). These grantees do not rate significantly differently than grantees who receive *no* nonmonetary assistance at all.
 - The provision of different patterns of nonmonetary assistance varies widely across program areas.
 - » *Given the resources that are invested in providing nonmonetary assistance to grantees, and given the minimal effect providing just a little assistance has on grantees, can the Fund review its strategy for providing nonmonetary assistance? In particular can it consider reducing the proportion of grantees receiving a pattern of little assistance – either by increasing the intensity of assistance provision or cutting back on sporadic assistance provision?*
 - » *Is the RBF intentionally providing grantees different patterns of nonmonetary assistance across program areas?*

Analysis and Discussion (4)

Opportunities to Improve the Helpfulness and Consistency of Administrative Processes

- ♦ Although results vary across RBF program areas, overall, RBF grantees rate similarly to the median funder for the helpfulness of the selection process in strengthening their own organizations. This rating is similar to the RBF's 2004 rating. Grantees also report that Fund staff is as involved as typical in the development of their proposals.
 - Grantees who report more substantial Fund involvement in the development of their proposals are more likely to find the selection process helpful in strengthening their own organizations.
 - Although on average, RBF grantees spend a typical number of hours on the selection process, the number of hours varies widely by program area. One grantee commented, "The amount of time and work put into the grant process, in our case, did not match the outcome. This ended up being a costly process for our organization."
- ♦ Overall, the Fund's grantees rate similarly to the median funder for the helpfulness of the reporting/evaluation process in strengthening their organizations. Like in the application process, both helpfulness and time spent by grantees on reporting and evaluation varies across program areas.
 - About half of RBF grantees report discussing their completed reports/evaluations with RBF staff – this proportion is typical though slightly lower than the proportion who reported conversations in 2004. Those grantees who do discuss their completed reports/evaluations with RBF staff rate the helpfulness of the reporting/evaluation process significantly higher than those who do not have these discussions.
- ♦ The number of dollars awarded to RBF grantees per hour of administrative time spent by the grantee is similar to that of the median funder. While grantees do spend more administrative time on average, they also receive larger grants on average. Again, this varies by program area.
 - » *Is the Fund interested in and/or able to be more involved in the development of grantees' proposals and/or more frequently discuss completed reports/evaluations with grantees?*
 - » *Are the differences in hours spent completing administrative processes across program areas consistent with the strategy for each program area and taken into account when determining eventual grant size?*
 - » *Across administrative processes are the discrepancies across program areas intentional and if not, how can processes be made more consistent across programs?*

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Current Economic Climate

The following section reflects the results of three questions related to the current economic environment. These questions are meant to address grantee and funder responses to the current economic climate.

- ♦ 58 percent of RBF's grantees have considered or made changes in response to the current economic climate, these grantees most frequently mention adding partners to assist in meeting the work's goals.

Measure	RBF 2010	Full Dataset Median	Cohort Funder Median
Changes to Work Funded by this Specific Grant in Response to the Current Economic Climate			
Shift in timeline of the work	21%	20%	N/A
Narrowing of scope of the work	22%	14%	N/A
Broadening of scope of the work	15%	14%	N/A
Adding partners to assist in meeting the work's goals	30%	30%	N/A
Modification of the specific results to be achieved by the work	18%	16%	N/A
We have not made or considered making any changes	42%	46%	N/A
Who Initially Suggested the Consideration of these Changes			
We considered these changes as a result of internal discussion	95%	91%	N/A
We considered these changes as a result of the Foundation's recommendation	5%	7%	N/A
We considered these changes as a result of another funder's recommendation	1%	1%	N/A
Helpfulness of the Foundation in the consideration of these changes (1="Not at all helpful" and 7="Extremely helpful")	5.1	5.1	N/A
Foundation was not involved in our consideration of these changes	43%	44%	N/A
Communication and Helpfulness of Foundation Strategy in Response to the Current Economic Climate			
Clarity of the Foundation's communication of its response to the current economic climate (1="Not at all clearly" and 7="Extremely clearly")	4.8	4.8	N/A
Foundation has not communicated its response to the current economic climate	31%	29%	N/A
Helpfulness of the Foundation in responding to the current economic climate (1="Not at all" and 7="To a great extent")	3.8	3.8	N/A

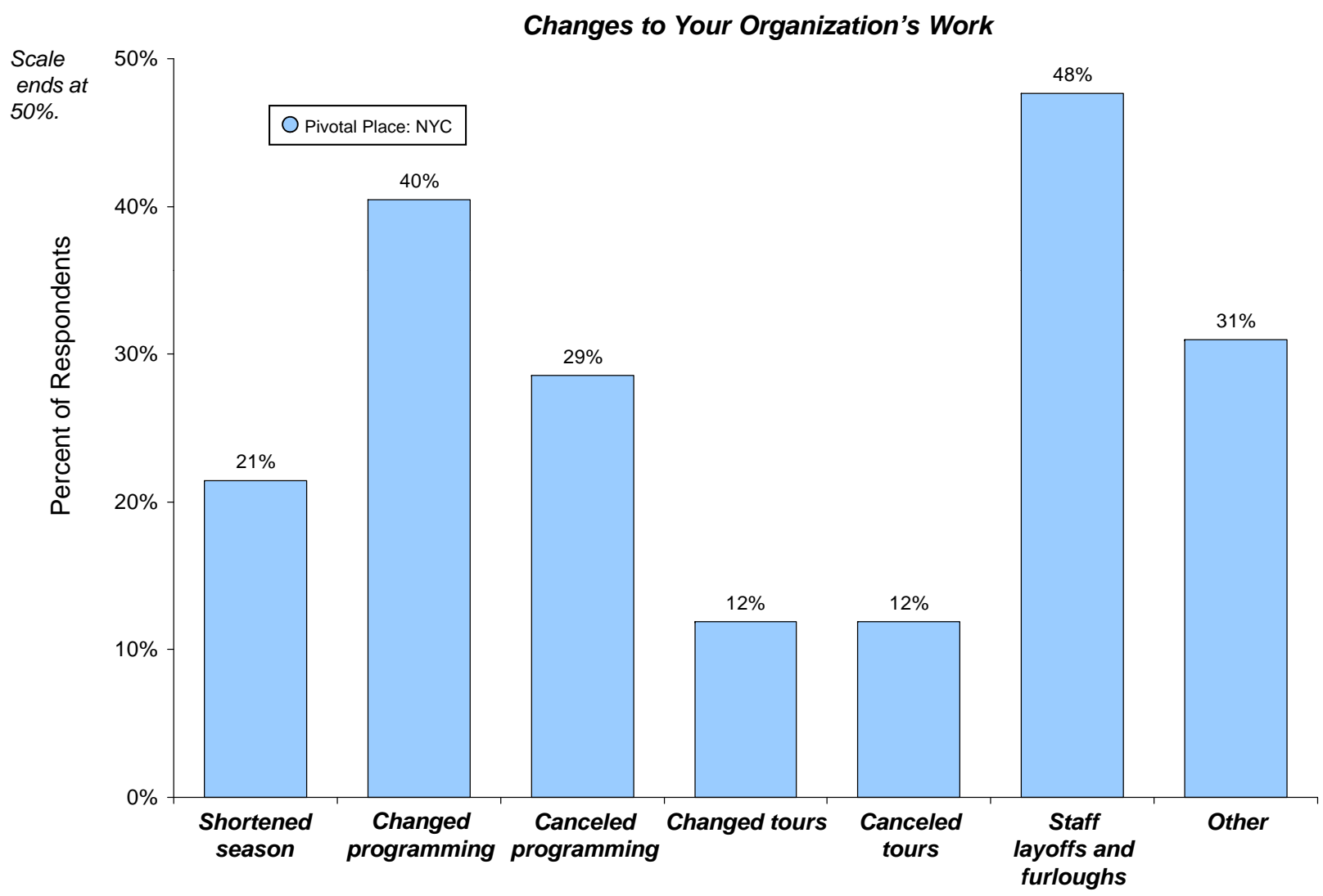
Shift in Sources of Revenue or Support in 2009

Have you seen a shift in any of the following sources of revenue or support in 2009?

Source of Revenue or Support	Increase	Decrease	No change
Foundation	16%	65%	19%
Local government	9%	42%	48%
State or federal government	15%	45%	40%
Bilateral & multilateral institutions	6%	34%	60%
Corporate	14%	46%	40%
Board contributions	22%	32%	46%
Individual contributions	18%	47%	35%
Earned income	17%	42%	42%

Changes to Your Organization's Work Over the Past Year Grantee Perception Report®

RBF Pivotal Place: New York City grantees were asked, “If you are an arts and culture organization, have you made or considered making any of the following changes to your organization’s work over the past year in response to the current economic climate?”



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Grantmaking Characteristics

Measure	RBF 2010	RBF 2004	Full Dataset Median	Cohort Funder Median
Length of Grant Awarded				
<i>Average grant length</i>	<i>1.9 years</i>	<i>2.4 years</i>	<i>2.1 years</i>	<i>2.4 years</i>
1 year	44%	29%	51%	29%
2 years	35%	51%	20%	32%
3 years	15%	12%	17%	26%
4 years	2%	2%	4%	5%
5 or more years	4%	6%	8%	9%
Type of Grant Awarded				
Program/Project Support	61%	N/A	65%	71%
General Operating Support	26%	N/A	19%	18%
Technical Assistance	7%	N/A	5%	5%
Building/Renovation	0%	N/A	7%	1%
Other Capital Support	0%	N/A	2%	2%
Scholarship/Fellowship	0%	N/A	1%	3%
Endowment Support	3%	N/A	1%	2%
Event/Sponsorship Funding ¹	2%	N/A	N/A	N/A
Grant Amount Awarded				
<i>Median grant size</i>	<i>\$100K</i>	<i>\$80K</i>	<i>\$60K</i>	<i>\$200K</i>
Less than \$10K	2%	2%	11%	1%
\$10K - \$24K	4%	11%	15%	3%
\$25K - \$49K	11%	13%	15%	5%
\$50K - \$99K	30%	30%	17%	15%
\$100K - \$149K	14%	18%	10%	12%
\$150K - \$299K	28%	17%	13%	24%
\$300K - \$499K	8%	7%	7%	14%
\$500K - \$999K	4%	1%	6%	12%
\$1MM and above	0%	1%	7%	14%
Median Percent of Budget Funded By Grant (Annualized)				
Size of grant relative to size of grantee budget	4.0%	4.8%	3.3%	4.7%

Survey-Wide Analysis Fact: By itself, type of grant awarded is not an important predictor of grantees' ratings of a philanthropic funder's impact on their organizations. However, ratings of impact on the grantee organization are higher for operating than program support grantees when those operating support grants are larger and longer term than what funders typically provide. For more information on these findings, please see CEP's report, *In Search of Impact: Practices and Perceptions in Foundations' Provision of Program and Operating Grants to Nonprofits*.

¹: Comparative and trend data not available for event/sponsorship funding because this option was added to the survey in the fall of 2009. For the 30 funders for which data is available, the average percentage of grantees indicating they received event/sponsorship funding was 2 percent.

Grantee Characteristics (1)

Measure	RBF 2010	RBF 2004	Full Dataset Median	Cohort Funder Median
Operating Budget of Grantee Organization				
<i>Median budget</i>	\$1.5MM	\$1.2MM	\$1.4MM	\$2.0MM
< \$100K	4%	9%	8%	4%
\$100K - \$499K	15%	19%	20%	16%
\$500K - \$999K	18%	16%	14%	13%
\$1MM - \$4.9MM	38%	36%	30%	31%
\$5MM - \$24.9MM	17%	12%	18%	21%
\$25MM and above	9%	7%	11%	15%
Length of Establishment of Grantee Organizations				
<i>Median length of establishment</i>	16 years	15 years	24 years	22 years
Less than 5 years	10%	10%	7%	7%
5 - 9 years	24%	19%	14%	16%
10 - 19 years	23%	33%	22%	23%
20 - 49 years	31%	24%	36%	35%
50 - 99 years	10%	9%	12%	12%
100 years or more	2%	5%	9%	7%

Grantee Characteristics (2)

Measure	RBF 2010	RBF 2004	Full Dataset Median	Cohort Funder Median
Length of Time Which Grantees Have Regularly Conducted the Funded Programs¹				
Less than 1 year	9%	N/A	17%	14%
1 - 5 years	61%	N/A	50%	56%
6 - 10 years	18%	N/A	15%	17%
More than 10 years	12%	N/A	18%	14%
Pattern of Grantees' Funding Relationship with the Foundation²				
First grant received from the Foundation	29%	N/A	34%	N/A
Consistent funding in the past	54%	N/A	48%	N/A
Inconsistent funding in the past	17%	N/A	18%	N/A
Length of Funding Relationship with the Foundation³				
1 - 5 years	56%	N/A	57%	N/A
6 - 10 years	31%	N/A	26%	N/A
More than 10 years	13%	N/A	17%	N/A
Funding Status and Grantees Previously Declined Funding				
Percent of grantees currently receiving funding from the Fund	69%	72%	75%	79%
Percent of grantees previously declined funding by the Fund	26%	34%	32%	31%

1: Represents data from 87 funders.

2: Represents data from 16 funders. This question includes a "don't know" response option; 1 percent of RBF 2010 respondents answered "don't know", compared to 3 percent at the median funder. RBF 2004 data and cohort funder data not available due to changes to the survey instrument.

3: Represents data from 16 funders. This question includes a "don't know" response option; 2 percent of RBF 2010 respondents answered "don't know", compared to 7 percent at the median funder. RBF 2004 data and cohort funder data not available due to changes to the survey instrument.

Note: RBF 2004 data not available due to changes to the survey instrument.

Grantee Characteristics (3)

Measure	RBF 2010	Full Dataset Median	Cohort Funder Median
Job Title of Respondents¹			
Executive Director	49%	49%	N/A
Development Director	9%	7%	N/A
Other Senior Management	12%	13%	N/A
Project Director	9%	14%	N/A
Other Development Staff	13%	5%	N/A
Volunteer	0%	3%	N/A
Other	7%	10%	N/A
Gender of Respondents²			
Female	52%	62%	51%
Male	48%	38%	49%

Female grantees rate significantly lower than male grantees on:

- Helpfulness of the selection process in strengthening their own organizations
- Pressure to modify proposals in order to receive funding
- Helpfulness of the evaluation process in strengthening their own organizations

Female grantees rate significantly higher than male grantees on:

- Impact on grantees' local communities

1: Contains data from 16 funders.

2: In Spring of 2009 CEP removed the word "optional" from this question but added an "other" response choice and a "prefer not to say" response choice. Previously this question was only infrequently skipped and so we have maintained comparative data in spite of the question change. In response to this question, a total of 3 percent of RBF 2010 respondents selected "other" or "prefer not to say," compared to 2 percent at the median funder.

Note: RBF 2004 data not available due to changes to the survey instrument.

Funder Characteristics

Measure	RBF 2010	RBF 2004	Full Dataset Median	Cohort Funder Median
Financial Information				
Total assets	\$726.1MM	\$709.7MM	\$269.3MM	\$3137.MM
Total giving	\$31.2MM	\$19.9MM	\$15.2MM	\$104.2MM
Funder Staffing¹				
Total staff (FTEs)	49	40	13	73

Note: Excludes FTEs devoted to the operation of funder charitable programs.

Source: Self-reported data provided by RBF and other GPR and Operational Benchmarking Report (OBR) subscribers from 2003-2009 survey rounds. RBF 2004 data not available due to changes to the survey instrument.

1: Staff information includes 11 Pocantico staff who have very little interaction with grantees.

Funders in Dataset

The 251 philanthropic funders whose grantees CEP has surveyed are listed below. Those that have received a GPR are denoted by an asterisk (*).

The Abell Foundation, Inc.	The Colorado Health Foundation*	Hartford Foundation for Public Giving*	The Morris and Gwendolyn	Rose Community Foundation*
Adolph Coors Foundation	Colorado Trust*	The Harvest Foundation of the Piedmont*	Cafritz Foundation	Russell Family Foundation*
The Ahmanson Foundation	The Columbus Foundation and	Health Foundation of Greater Cincinnati*	Ms. Foundation for Women*	Ruth Mott Foundation*
Alaska Mental Health Trust Authority*	Affiliated Organizations*	The Heinz Endowments*	The Mt. Sinai Health Care Foundation*	S & G Foundation, Inc.
Alfred P. Sloan Foundation	Community Foundation Silicon Valley*	Helen Andrus Benedict Foundation*	The Nathan Cummings Foundation*	S. H. Cowell Foundation*
Alliance for California Traditional Arts*	Community Memorial Foundation*	Henry H. Kessler Foundation*	Nellie Mae Education Foundation*	Saint Luke's Foundation of
Alphawood Foundation	Community Technology Foundation of California*	Hess Foundation, Inc.	The New Hampshire Charitable	Cleveland, Ohio*
Altman Foundation	Connecticut Health Foundation, Inc.*	Horace W. Goldsmith Foundation	Foundation*	The Saint Paul Foundation Inc.*
The Ambrose Monell Foundation	Conrad N. Hilton Foundation*	The Horizon Foundation for New Jersey*	New Profit, Inc.*	Santa Barbara Foundation*
Amelia Peabody Foundation	Daniels Fund	Houston Endowment, Inc.*	New York Community Trust*	SC Ministry Foundation*
Amon G. Carter Foundation	Danville Regional Foundation*	HRJ Consulting*	New York State Health Foundation*	Sea Change Foundation*
Andersen Foundation	The David and Lucile Packard Foundation*	The Hyams Foundation, Inc.	Nina Mason Pulliam Charitable Trust*	Shelton Family Foundation
Ann Arbor Area Community Foundation*	Dekko Foundation, Inc.*	J. A. & Kathryn Albertson Foundation	Nord Family Foundation*	The Sherman Fairchild
The Annenberg Foundation	Doris Duke Charitable Foundation*	J. Bulow Campbell Foundation	Northwest Area Foundation*	Foundation, Inc.
The Anschutz Foundation	The Duke Endowment*	The J. Willard and Alice S. Marriott Foundation	Northwest Health Foundation*	The Shubert Foundation
Arcus Foundation*	Dyson Foundation*	Jacob and Valeria Langeloth Foundation*	Omidyar Foundation*	The Skillman Foundation*
Arts Council Silicon Valley*	E. Rhodes & Leona B. Carpenter Foundation*	James Graham Brown Foundation, Inc.	One Foundation*	The Skoll Foundation*
The Assisi Foundation of Memphis, Inc.*	East Bay Community Foundation*	The James Irvine Foundation*	Ontario Trillium Foundation*	Stuart Foundation*
The Atlantic Philanthropies*	Eden Hall Foundation	The Jay and Rose Phillips Family Foundation	The Overbrook Foundation	Surdna Foundation, Inc.*
AVI CHAI Foundation*	The Educational Foundation of America*	Jessie Ball duPont Fund*	Partnership for Excellence in Jewish	Susan G. Komen Breast
Baptist Community Ministries	El Pomar Foundation	Jessie Smith Noyes Foundation*	Education (PEJE)*	Cancer Foundation*
Barr Foundation*	Endowment for Health*	The Josiah Macy, Jr. Foundation*	Paul G. Allen Foundations*	T.L.L. Temple Foundation
Beldon Fund*	The Energy Foundation*	The John A. Hartford Foundation, Inc.*	Paul Hamlyn Foundation*	Thrivent Financial for
Bill & Melinda Gates Foundation*	The Erie Community Foundation*	John D. and Catherine T.	Peninsula Community Foundation*	Lutherans Foundation*
Blandin Foundation*	Eugene and Agnes E. Meyer Foundation*	MacArthur Foundation*	The Pears Foundation*	United Way of Massachusetts Bay*
Blue Cross Blue Shield of	Evelyn and Walter Haas, Jr. Fund*	John P. McGovern Foundation	The Peter and Elizabeth C.	Vancouver Foundation*
Massachusetts Foundation*	F. M. Kirby Foundation, Inc.	The John R. Oishei Foundation*	Tower Foundation*	The Vermont Community Foundation*
Blue Shield of California Foundation*	The F.B. Heron Foundation*	John S. and James L. Knight Foundation*	PetSmart Charities*	Victoria Foundation, Inc.
Boston Foundation, Inc.*	The Fan Fox and Leslie R.	Kalamazoo Community Foundation*	The Pew Charitable Trusts	Virginia G. Piper Charitable Trust*
Bradley Foundation	Samuels Foundation	Kansas Health Foundation*	Philadelphia Foundation*	W. K. Kellogg Foundation*
Bradley-Turner Foundation	Fannie Mae Foundation*	Kate B. Reynolds Charitable Trust	The Pittsburgh Foundation*	Wachovia Regional Foundation*
The Broad Foundation*	First 5 Alameda County – Every Child Counts*	Kendeda Fund*	Polk Bros. Foundation*	Waitt Family Foundation
The Brown Foundation*	The Ford Family Foundation*	The Kresge Foundation*	Pritzker Foundation	The Wallace Foundation*
Bush Foundation*	The Ford Foundation*	Kronkosky Charitable Foundation*	PSEG Foundation and Corporate	Walter & Elise Haas Fund*
The California Endowment*	France-Merrick Foundation	The Lenfest Foundation, Inc.	Responsibility Department*	Wayne & Gladys Valley Foundation*
California HealthCare Foundation*	Friends Provident Foundation*	Levi Strauss Foundation*	Public Welfare Foundation	Weingart Foundation
The California Wellness Foundation	The Frist Foundation	Lloyd A. Fry Foundation*	Quantum Foundation	Wellington Management
The Cannon Foundation, Inc.	The GAR Foundation*	Longwood Foundation*	The Ralph M. Parsons Foundation	Charitable Fund*
Caring for Colorado Foundation*	Gates Family Foundation	The Louis Calder Foundation	Raskob Foundation for Catholic	Wilburforce Foundation*
Carnegie Corporation of New York*	Gaylord and Dorothy	Lucile Packard Foundation for	Activities, Inc.*	The William and Flora
Carrie Estelle Doheny Foundation	Donnelley Foundation*	Children's Health*	Rasmuson Foundation*	Hewlett Foundation*
The Case Foundation*	General Mills Foundation*	Lumina Foundation for Education, Inc.*	The Raymond John Wean Foundation*	The William K. Warren Foundation
Central Indiana Community Foundation*	The George Gund Foundation*	Maine Community Foundation*	Resources Legacy Fund*	William Penn Foundation*
The Champlin Foundations	The George S. and Dolores Dore	Maine Health Access Foundation*	The Rhode Island Foundation*	The William Randolph
Charles and Helen Schwab Foundation*	Eccles Foundation	Marguerite Casey Foundation*	Richard & Rhoda Goldman Fund*	Hearst Foundations
Charles and Lynn Schusterman	Geraldine R. Dodge Foundation*	Mary Reynolds Babcock Foundation*	Richard King Mellon Foundation	The William Stamps Farish Fund
Family Foundation*	The Gill Foundation*	Mathile Family Foundation	Richard M. Fairbanks Foundation*	William T. Kemper Foundation
Charles Stewart Mott Foundation*	The Goizueta Foundation*	The McKnight Foundation*	Robert R. McCormick Tribune	Williamsburg Community
The Chicago Community Trust*	Gordon and Betty Moore Foundation*	Medina Foundation*	Foundation	Health Foundation*
The Christensen Fund*	Grable Foundation*	MetroWest Community	The Robert Wood Johnson	Windgate Charitable Foundation, Inc.
The Clark Foundation	Grand Rapids Community Foundation*	Health Care Foundation*	Foundation*	Winter Park Health Foundation*
Claude Worthington	The Greater Cincinnati Foundation*	Meyer Memorial Trust	The Robin Hood Foundation*	Woods Fund of Chicago*
Benedum Foundation*	Gulf Coast Community Foundation of Venice*	Michael Reese Health Trust*	Rockefeller Brothers Fund*	Yad Hanadiv*
The Cleveland Foundation*	Hall Family Foundation	The Minneapolis Foundation*	Rockefeller Foundation*	Zeist Foundation*
The Clowes Fund*	Harold K.L. Castle Foundation*	Missouri Foundation for Health*	Rollin M. Gerstacker Foundation	Z. Smith Reynolds Foundation, Inc.*
The Collins Foundation	The Harry and Jeanette Weinberg Foundation, Inc.*			

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About the Center for Effective Philanthropy (CEP)

Mission

To provide data and create insight so philanthropic funders can better define, assess, and improve their effectiveness and impact.

Vision

We seek a world in which pressing social needs are more effectively addressed. We believe improved effectiveness of philanthropic funders can have a profoundly positive impact on nonprofit organizations and the people and communities they serve.

CEP Funders

CEP is funded through a combination of foundation grants and revenue earned from management tools and seminars. Funders providing support for CEP's work include:

The
ATLANTIC
Philanthropies

Bill & Melinda Gates
Foundation

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Charles Stewart Mott Foundation

The David and Lucile Packard
Foundation

THE
**Edna McConnell
Clark** FOUNDATION

the **James Irvine** foundation
Expanding Opportunity for the People of California

Gordon and Betty
MOORE
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 **The Wallace Foundation**
*Supporting ideas.
Sharing solutions.
Expanding opportunities.®*

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AND FLORA HEWLETT
FOUNDATION**

CEP Research

CEP's research and creation of comparative data sets leads to the development of assessment tools, publications serving the philanthropic funder field, and programming. CEP's research initiatives focus on several subjects, including:

Research Focus	CEP Publication
Performance Assessment	<i>Toward a Common Language: Listening to Foundation CEOs and Other Experts Talk About Performance Measurement in Philanthropy</i> (2002)
	<i>Indicators of Effectiveness: Understanding and Improving Foundation Performance</i> (2002)
	<i>Assessing Performance at the Robert Wood Johnson Foundation: A Case Study</i> (2004)
Funder Strategy	<i>Beyond the Rhetoric: Foundation Strategy</i> (2007)
	<i>Lessons from the Field: Becoming Strategic: The Evolution of the Flinn Foundation</i> (2009)
	<i>The Essentials of Foundation Strategy</i> (2009)
	<i>Lessons from the Field: Striving for Transformative Change at the Stuart Foundation</i> (2009)
Funder Governance	<i>Foundation Governance: The CEO Viewpoint</i> (2004)
	<i>Beyond Compliance: The Trustee Viewpoint on Effective Foundation Governance</i> (2005)
Funder-Grantee Relationships	<i>Listening to Grantees: What Nonprofits Value in Their Foundation Funders</i> (2004)
	<i>Foundation Communications: The Grantee Perspective</i> (2006)
	<i>In Search of Impact: Practices and Perceptions in Foundations' Provision of Program and Operating Grants to Nonprofits</i> (2006)
	<i>Luck of the Draw</i> (2007)
	<i>Working with Grantees: The Keys to Success and Five Program Officers Who Exemplify Them</i> (2010)
Managing Operations	<i>Lessons from the Field: Improving the Experience at the David and Lucile Packard Foundation</i> (2008)
	<i>Lessons from the Field: Aiming for Excellence at the Wallace Foundation</i> (2008)
Non-Monetary Assistance	<i>More than Money: Making a Difference with Assistance Beyond the Grant</i> (2008)

CEP Assessment Tools

CEP provides philanthropic funder leaders with assessment tools – utilizing comparative data – that inform performance assessment:

- **Grantee Perception Report® (GPR):** provides CEOs, boards, and staff with comparative data on grantee perceptions of funder performance on a variety of dimensions
- **Applicant Perception Report (APR):** a companion to the GPR that provides comparative data from surveys of declined grant applicants
- **Comparative Board Report (CBR):** provides data on board structure and trustee perceptions of board effectiveness on a comparative basis
- **Staff Perception Report (SPR):** explores philanthropic funder staff members' perceptions of funder effectiveness and job satisfaction on a comparative basis
- **Operational Benchmarking Report (OBR):** provides comparative data, relative to a selected peer group of funders, on aspects of philanthropic funder operations – including organization staffing, program officer workload, grant processing times, and administrative costs
- **Stakeholder Assessment Report (STAR):** delivers insight about a funder's effectiveness by surveying stakeholders a funder seeks to influence as part of its strategy
- **Multidimensional Assessment Process (MAP):** provides an integrated assessment of performance, assimilating results and data from all of CEP's assessment tools into key findings, implications, and recommended action steps for greater effectiveness
- **Donor Perception Report (DPR):** creates insight, on a comparative basis, about donors' perceptions of the community foundations to and through which they contribute or establish funds
- **Beneficiary Perception Report (BPR):** informs the work of funders and grantees by providing comparative feedback from those whose lives funders seek to improve – the ultimate beneficiaries of funders' philanthropic efforts

Contact Information

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