

CEP and the Grantee Perception Report

CDR Webinar – September 17, 2020



THE CENTER FOR
EFFECTIVE PHILANTHROPY

CEP'S MISSION

To provide data and create insight
so philanthropic funders can better define,
assess, and improve their effectiveness –
and, as a result, their intended impact.



ASSESSMENTS



PROGRAMMING



RESEARCH



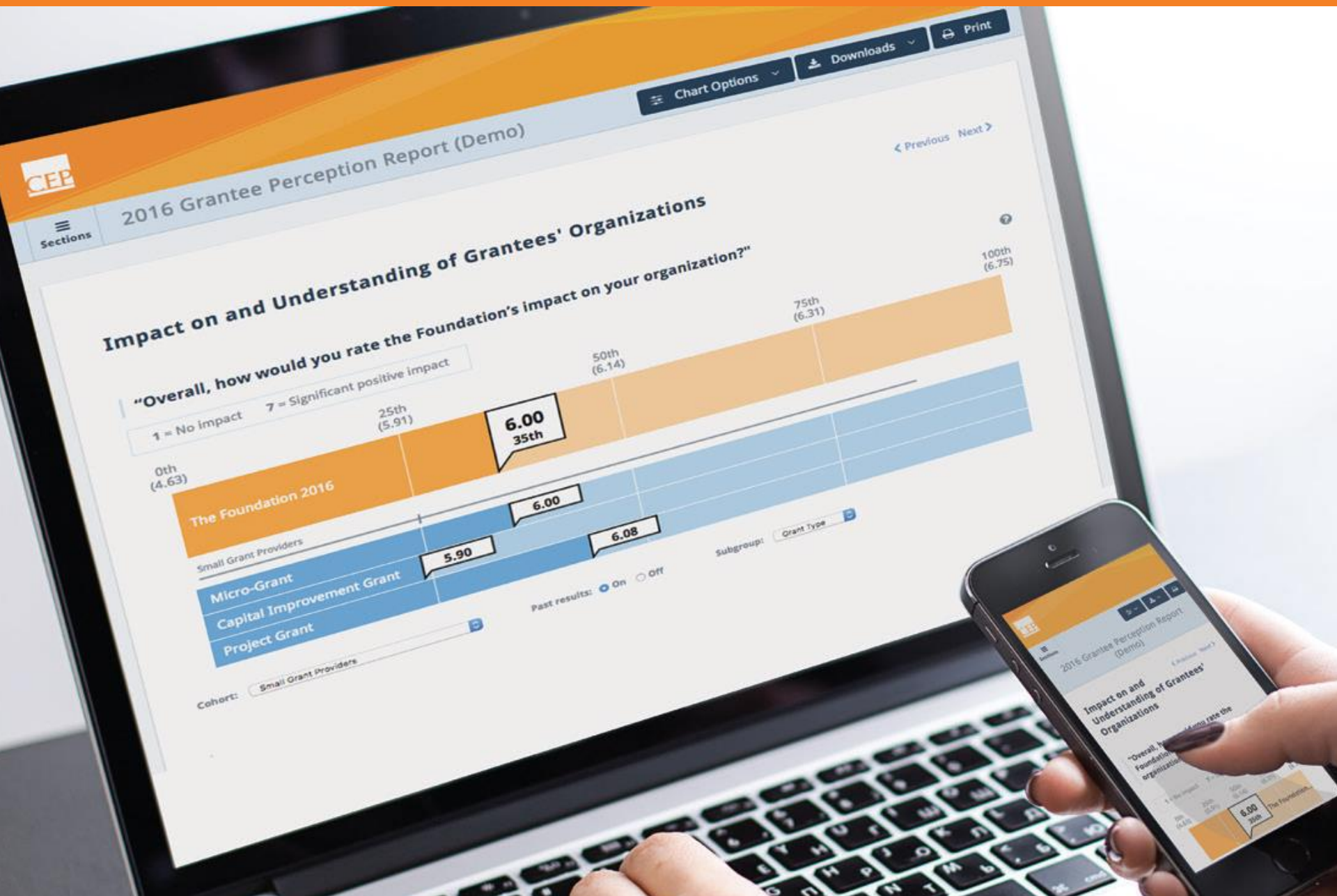
ADVISORY SERVICES



“The foundation must place some trust in the ability of its grantees to carry out the projects which have been funded through the foundation without constant questioning and criticism.”

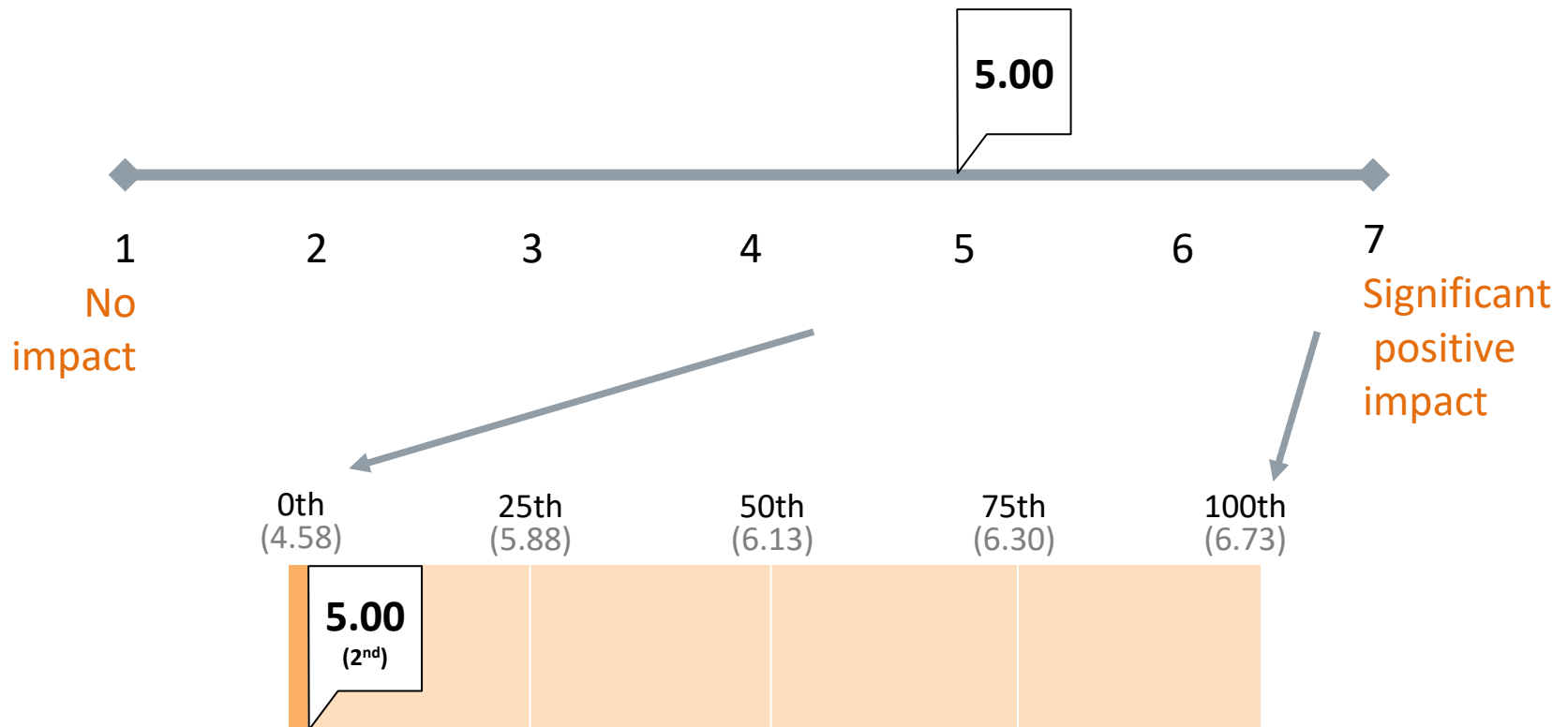
“I had experience with the Endowment during its infancy and can confidently say the focus on personal relationships and interactions between staff and grantees is wonderful! The changes put into place—and consistent self-evaluation—have made a tremendous difference.”

The Grantee Perception Report



Comparative Data Is Necessary

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



Important Topics for Funders & Grantees



IMPACT

How much impact do grantees believe your foundation has on their organizations and in the fields and communities in which they work?



RELATIONSHIPS

How do your relationships – interactions and communications – with grantees accelerate your ability to achieve your goals?



APPLICATION & REPORTING PROCESS

What do grantees find most helpful and frustrating about your application and reporting & evaluation processes? Are they burdensome?



Expertise

How well do you understand the issues, communities, beneficiary needs, and social context that affect your and grantees' work?

Analysis: Programs, grant size, history, interaction, race, gender, etc.

U.S. Funders Believe In The Importance of Feedback from Grantees

80,000+
NGOs

320+
FUNDERS

\$1M - \$30B+
ASSETS

7 of 10
Largest US Foundations
GIVING

98% of GPR users would recommend the GPR to other funders

“希尔顿基金会（Hilton Foundation）致力于成为更有效、更有战略的基金会，有效慈善中心是我们极为重要的资源。周全、专业、充分尊重伙伴的调研问题设置以及全面的调研结果分析，为我们带来了新的洞见，并指导我们不断完善。长期、持续的伙伴反馈，也进一步验证了我们的进步...”

- Conrad N. Hilton Foundation

Major Funders Seek Feedback Regularly





Do the Experiences of NGOs Even matter?

Why Feedback Matters to Foundations

Impact

Approach, Understanding,
Relationships

Efficiency

Cost, Burden,
Bureaucracy

Accountability

Values, Beliefs, Reputation

Important to Measure Over Time

Key Measures

Trend Data

Average Rating

Percentile Rank

Field Impact

Impact on Grantees' Fields



6.01



Organizational Impact

Impact on Grantees' Organizations



6.38



Relationships

Strength of Relationships with Grantees



6.25



Selection Process

Helpfulness of the Selection Process



5.03



Part 3: 参会者分享 / Audience Sharing

- What challenges are we facing in gathering and dealing with the grantee feedback? / 在收集、分析资助伙伴反馈的过程中，我们遇到了哪些挑战？

The GPR Drives Change ...

Changed ways they communicate with grantees

89%

Changed their grantmaking processes

74%

Changed their assistance beyond the grant

70%

Addressed performance of program / department

59%

Changed foundation strategy

41%

最早第一次的伙伴反馈，很好的帮助我们识别出我们最需要、最想提升的方面。每一次后续服务，则让我们的员工、捐赠人、理事会能够持续监测基金会的表现，确保我们在那些对资助成效最重要的方面，始终保持进步。每做一次资助伙伴反馈，都促使基金会所有人进一步思考和讨论，“到底什么是有效资助”。

- Paul Beaudet, Executive Director, Wilburforce Foundation

Source: LFA Group independent assessment of GPR users in 2016 and 2017. http://cep.org/wp-content/uploads/2018/06/CEP-2018-Resource-and-Assessment-Survey-Analysis-Summary-Report_UPDATED-5-17-18.pdf

The GPR Drives Change ... But There Are Barriers

Leadership

Leaders need to prioritize change

Inclusion

Staff included in decisions about what to change

Goals

Choose a limited number of goals and make them clear

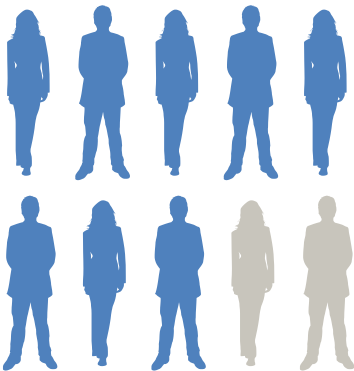
Resources

Devote time and resources needed to support change

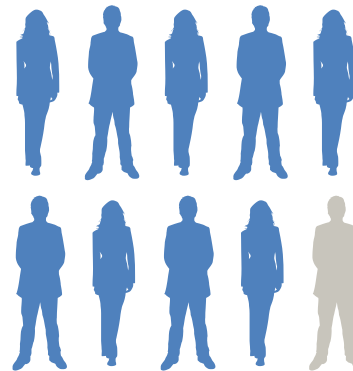
Grantees Experience Those Changes

100+ funders used GPR at least 2x

80+ funders used GPR at least 3x



80%
improved impact
on grantees'
organizations



90%
improved impact
on grantees'
organizations

Case Examples



Barr
Foundation



FORDFOUNDATION

the David &
Lucile **Packard**
FOUNDATION

Barr Foundation

“Typical” Isn’t Good Enough

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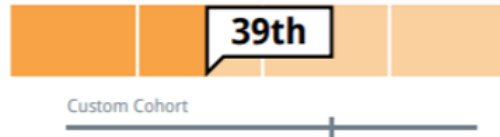
 LINKEDIN

 EMAIL

We asked our grantees what it’s like to work with Barr. Here’s what we learned and what we’re doing about it.

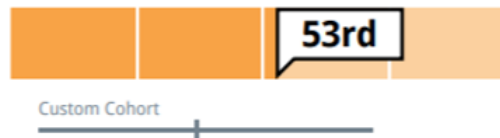
Field Impact

Impact on Grantees’ Fields



Community Impact

Impact on Grantees’ Communities



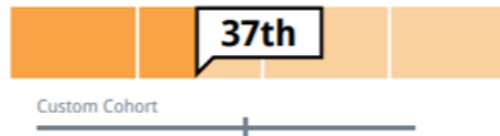
Organizational Impact

Impact on Grantees’ Organizations



Relationships

Strength of Relationships with Grantee



An Introduction To The
GRANTEE PERCEPTION REPORT



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Packard Grantee Experience Standards

Funder-Grantee Relationships



INTERACTIONS

- **Fairness** of treatment by foundation
- **Comfort approaching** foundation if a problem arises
- **Responsiveness** of foundation staff



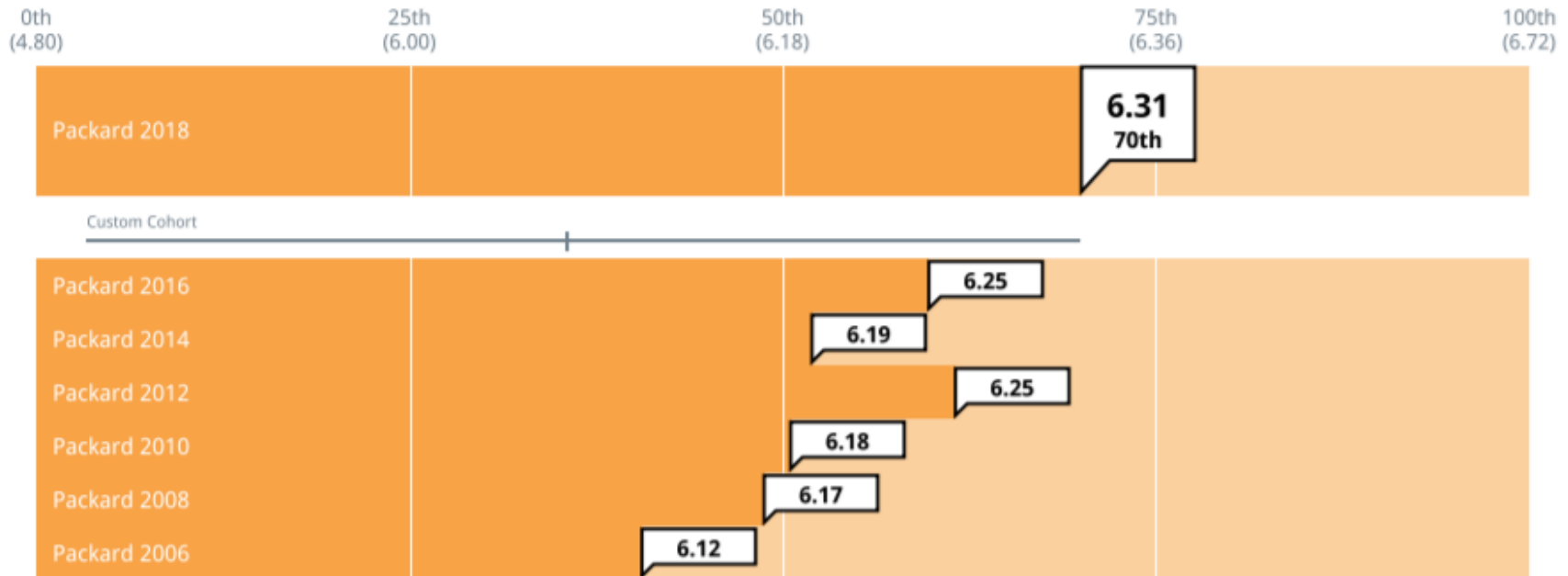
COMMUNICATIONS

- **Clarity of communication** of foundation's goals and strategy
- **Consistency of information** provided by different communications

Packard Grantee Experience Standards

Funder-Grantee Relationships Summary Measure

1 = Very negative 7 = Very positive



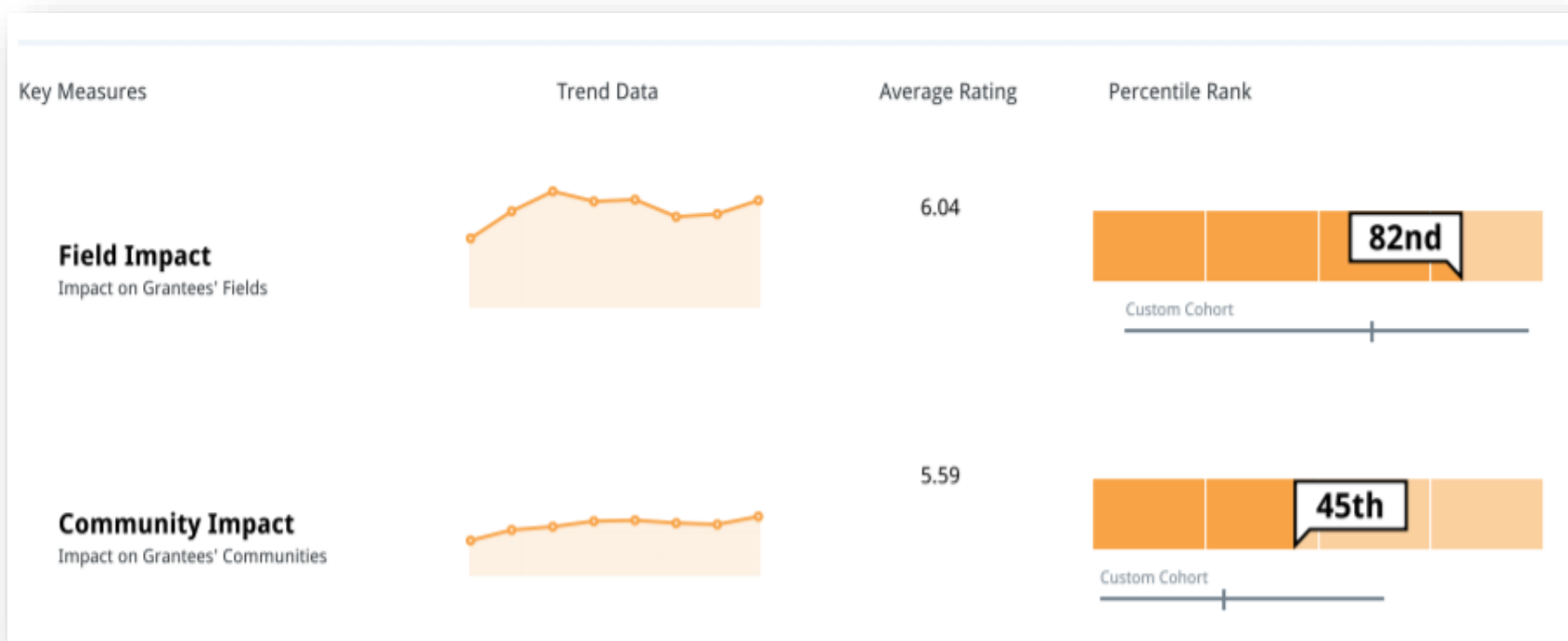
The David and Lucile Packard Foundation

Grantee Experience Standards

The Packard Foundation is committed to establishing and maintaining effective relationships with our grantee partners. Updated in 2020 with extensive support and input from Packard Foundation grantees, we strive to deliver on the following Grantee Experience Standards (GES) and continually monitor our efforts to meet them:

- › **Respect** – Grantees feel Foundation staff value grantee expertise and time, and approach funder-grantee power dynamics with humility and openness.
- › **Engagement** – Grantees feel they have opportunities to meaningfully engage in two-way dialogue with Foundation staff about our shared work.
- › **Strategy** – Grantees feel they understand how their work connects to the Foundation's strategy, how strategies evolve over time, and how to share input on those strategies.
- › **Information** – Grantees feel Foundation staff are thoughtful about asking for and sharing information, data, and feedback, and are transparent about how and why it is used.
- › **Process** – Grantees feel they understand the Foundation's grant requirements and processes.
- › **Responsiveness** – Grantees feel Foundation staff provide timely responses to grantee questions.

The David and Lucile Packard Foundation Grantee Experience Standards





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Visit cep.org to learn about the **Grantee Perception Report**.

