

*CONFIDENTIAL*

# Grantee Perception Report®

prepared for the

## Stuart Foundation

Spring 2006

Excerpt

*VERSION 08/11/06*



THE CENTER FOR  
EFFECTIVE PHILANTHROPY

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## Background

- ♦ Since February 2003, the Center for Effective Philanthropy (CEP) has conducted surveys of grantees on their perceptions of their foundation funders both on behalf of individual foundations and independently. The purpose of these surveys is two-fold: to gather data that is useful on a field-wide basis – forming the basis of research reports such as *Listening to Grantees: What Nonprofits Value in Their Foundation Funders* (2004) and *Foundation Communications: The Grantee Perspective* (2006) – and to provide individual foundations with Grantee Perception Reports.
  
- ♦ **The Grantee Perception Report® (GPR) shows an individual foundation its grantee perceptions relative to a set of perceptions of other foundations whose grantees were surveyed by CEP. Although grantee perceptions are not definitive evidence of a foundation’s end social impact, they can be helpful in assessing a foundation’s overall performance and progress.**
  - 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 unique strategy of the foundation.
    - The survey covers many areas in which grantees’ perceptions might be interesting to a foundation. Each foundation should place emphasis on the areas covered according to the foundation’s specific priorities.
    - Low ratings in an area that is not core to a foundation’s strategy may not be concerning to a foundation. For example, a foundation 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, foundation structural characteristics – such as type, asset size, focus, and age – are not strong predictors of grantee perceptions, suggesting that it is possible for all foundations to attain high ratings from grantees.

# Methodology

- ◆ The Center for Effective Philanthropy (CEP) has surveyed more than 35,000 grantees of 180 foundations since spring 2003. Please see the Appendix for a list of all foundations whose grantees CEP has surveyed.
- ◆ This Grantee Perception Report (GPR) contains data collected over the last six rounds of surveys, and includes more than 23,000 grantee responses of 156 foundations.<sup>1</sup>
  - 146 fiscal year 2004 and 2005 grantees of the Stuart Foundation (“Stuart”) were surveyed from February – April 2006.
  - 123 completed responses were received, representing an 84 percent response rate.
  - Responses were submitted via mail and the Web.
- ◆ Contact information for fiscal year 2004 and 2005 grant recipients was provided by the Stuart Foundation.
- ◆ Wherever possible, Stuart grantees’ average responses from CEP’s 2003 survey of 2002 and 2001 grant recipients is also shown.
  - CEP’s 2003 survey of 2002 and 2001 grant recipients excludes Board Initiated Special Interest grants.
- ◆ Selected grantee comments are shown throughout this report. As with grantee ratings, grantee comments are generally positive. This selection of comments highlights major themes, and reflects trends in the data. These selected comments over-represent negative comments about the Foundation in order to offer foundation leadership a wide range of perspectives.

1: Response rates vary by round, but do not have any bearing on grantee ratings, which remain consistent – and comparable – among rounds in terms of average and range. Response rate for the survey was 66 percent in the September 2003 round, 65 percent in the March 2004 survey round, 65 percent in the September 2004 survey round, 67 percent in the March 2005 round, 64 percent in the September 2005 round, and 68 percent in the February 2006 round. There are no meaningful differences between responses received via the mail or the Web.

# Key Findings

The Center for Effective Philanthropy has conducted two surveys of Stuart Foundation (“Stuart”) grantees – one in Fall 2003 and one in Spring 2006. On most measures with comparative data from both years, grantee ratings are similar or higher in 2006 than they were in 2003. On most major measures, the Foundation is rated close to or above the median of all foundations.

In 2003, Stuart received below average ratings for its impact on grantees’ fields, but above average ratings for its understanding of, ability to advance knowledge in, and effect public policy in those fields. While the Foundation has maintained its positive ratings for the latter measures, grantees in 2006 rate the Foundation’s impact on their fields more positively than in 2003 and more positively than the median foundation is rated by its grantees. Ratings of the Foundation’s impact on and understanding of grantees’ local communities are similar to those received in 2003 and are below the ratings of the median foundation.

Grantees in 2003 and 2006 have similar perceptions of their satisfaction with Stuart and the clarity with which the Foundation communicates its goals and strategies. Grantees’ ratings for the quality of interactions with Foundation staff – responsiveness, fairness, and approachability – are similar to or slightly less positive than they were in 2003. Suggestions about the quality of the Foundation’s interactions, frequently asking for more frequent interactions with the Foundation, represent the largest proportion of grantee suggestions for the Foundation’s improvement.

The Foundation has maintained its positive ratings for its impact on grantees’ organizations, and grantees’ ratings for the Foundation’s understanding of their goals and strategies have significantly improved.

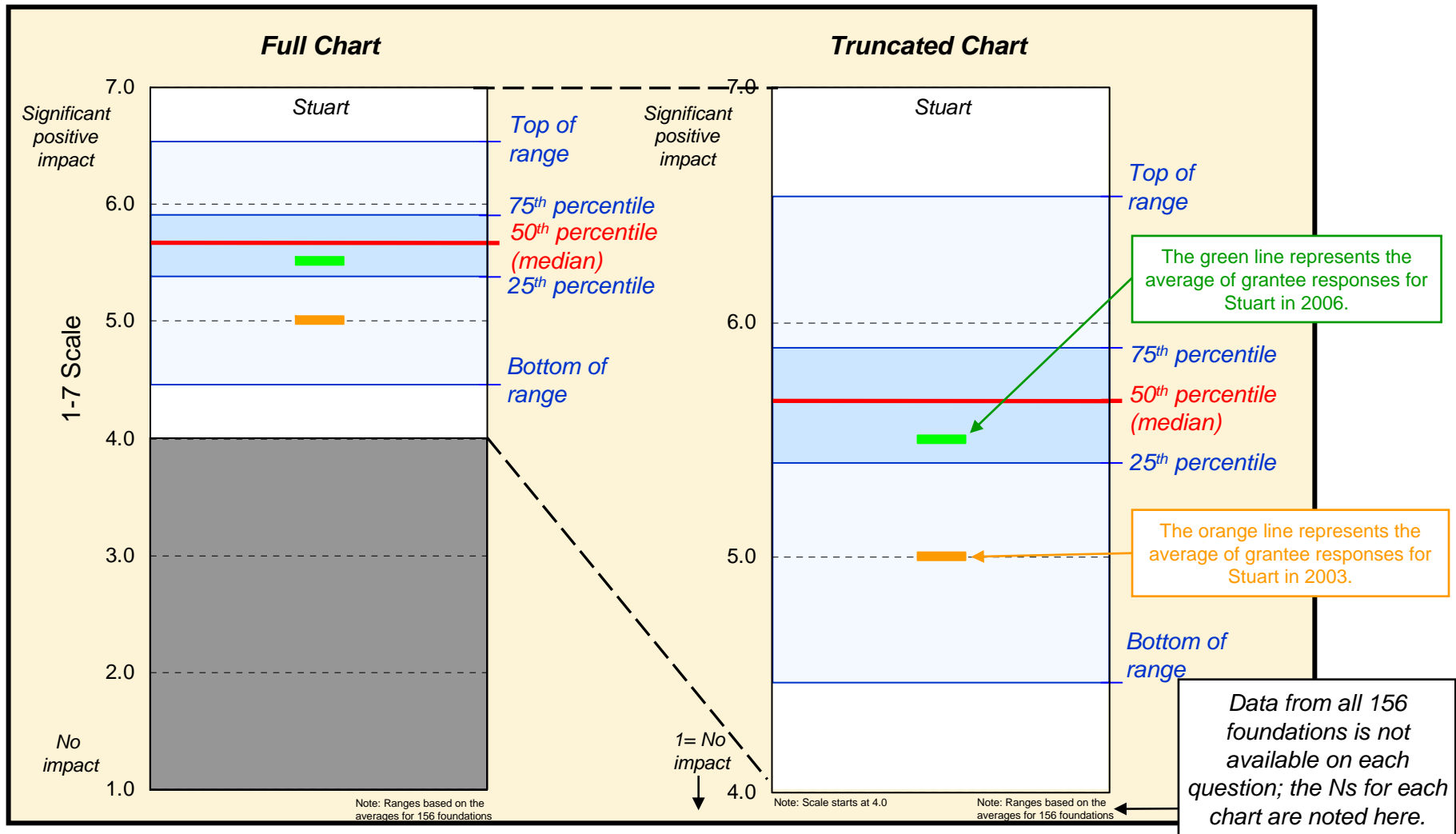
The Foundation continues to provide larger than typical proportions of grantees with assistance securing funding from other sources and other non-monetary assistance, although Stuart 2003 data is not completely comparable to 2006 data because of changes to the survey instrument. The impact and helpfulness of the Foundation’s non-monetary assistance is rated more positively than typical.

On measures of the helpfulness of Stuart’s selection and reporting/evaluation processes in strengthening grantees, the Foundation receives rating that are more positive as the ratings received by the median foundation. Although the ratings of helpfulness are not completely comparable between 2003 and 2006 due to changes to the survey instrument, in 2003 Stuart was rated much closer to the top of the range for the helpfulness of the selection and reporting/evaluation processes.

While Stuart’s selection and reporting/evaluation processes require more time of grantees, the Foundation awards larger grants than the median foundation, resulting in a dollar return on grantees administrative hours that is higher than typical.

# Reading GPR Graphs

Much of the grantee perception data in the GPR is presented in the format below. These graphs show average ratings of grantee responses for individual foundations, over a background that shows percentiles for the overall sample of grantee ratings of all 156 foundations. **Throughout the report, many charts in this format are truncated from the full scale because foundation averages fall within the top half of the range.**



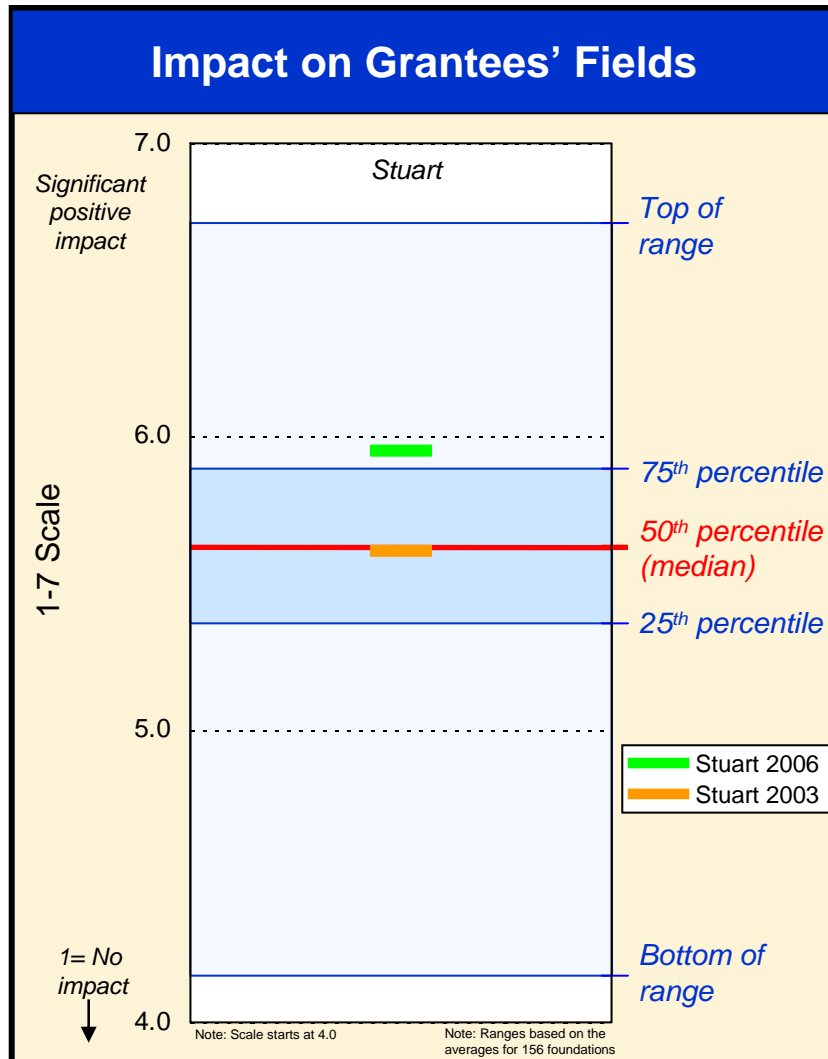
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# Impact on Grantees' Fields

This rating highlights grantees' perceptions of foundations' impact on the fields<sup>1</sup> in which grantees operate.

- ◆ Overall, Stuart grantees rate the Foundation's impact on their fields more positively than do grantees of the median foundation.

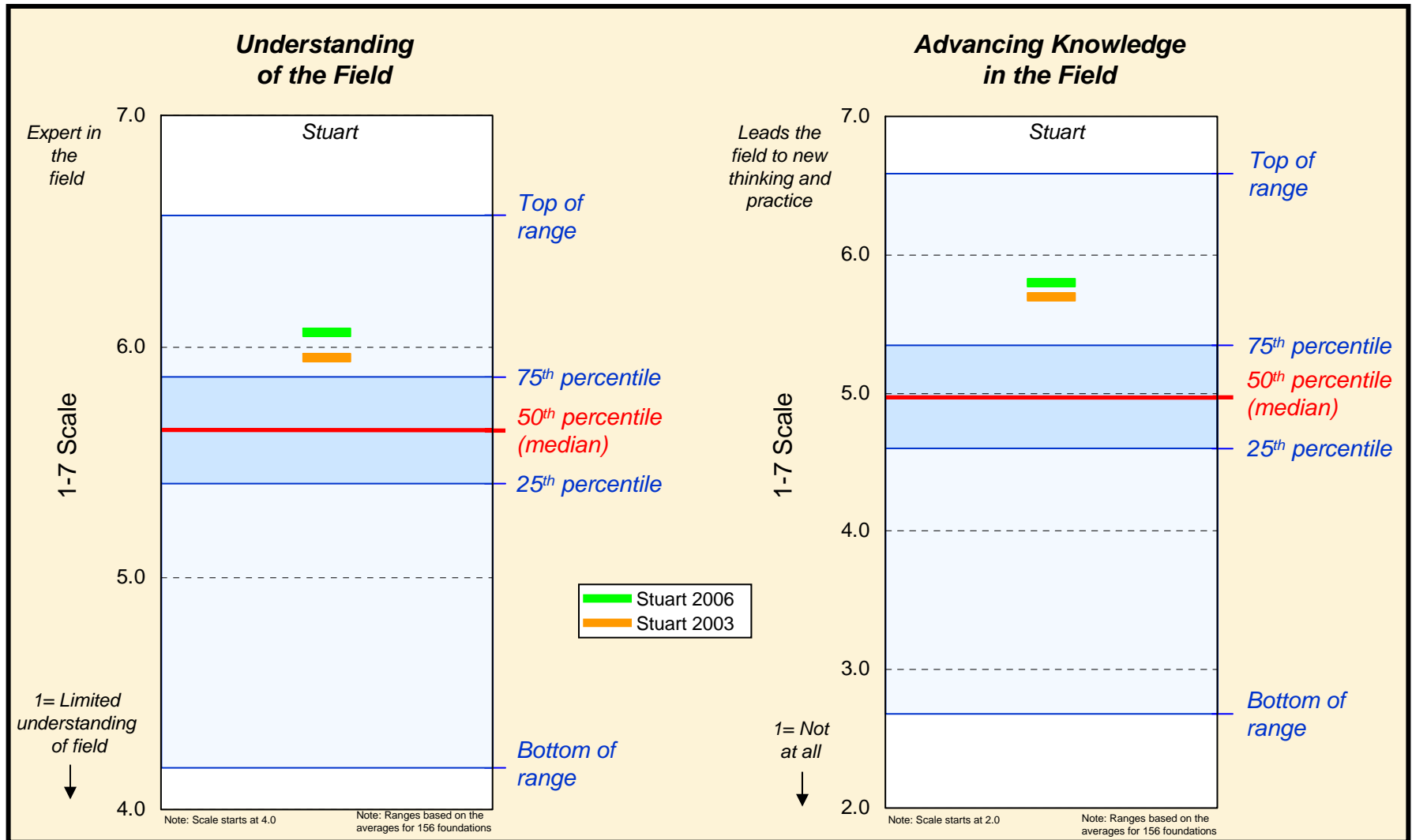


## Grantee Comments on Field Impact

- ◆ “Fewer and fewer foundations are willing to invest in public policy work long enough to see initiatives bear fruit. Because the Stuart Foundation is willing to stand by grantees ‘for the long haul’ it is now seeing the results of its investment.”
- ◆ “Our project officer is extremely knowledgeable, works creatively with other foundations to move the field ahead, and is bringing important stakeholders together to bring about change.”
- ◆ “By virtue of this Foundation, the field of child welfare has been greatly changed. Children and families are much better served.”
- ◆ “[The Foundation is] very involved in the field in a variety of contexts and with a great deal of impact”
- ◆ “The Stuart Foundation is an important supporter of major convenings and provides multiple levels of support for different sectors of the field to come together and learn from one another.”

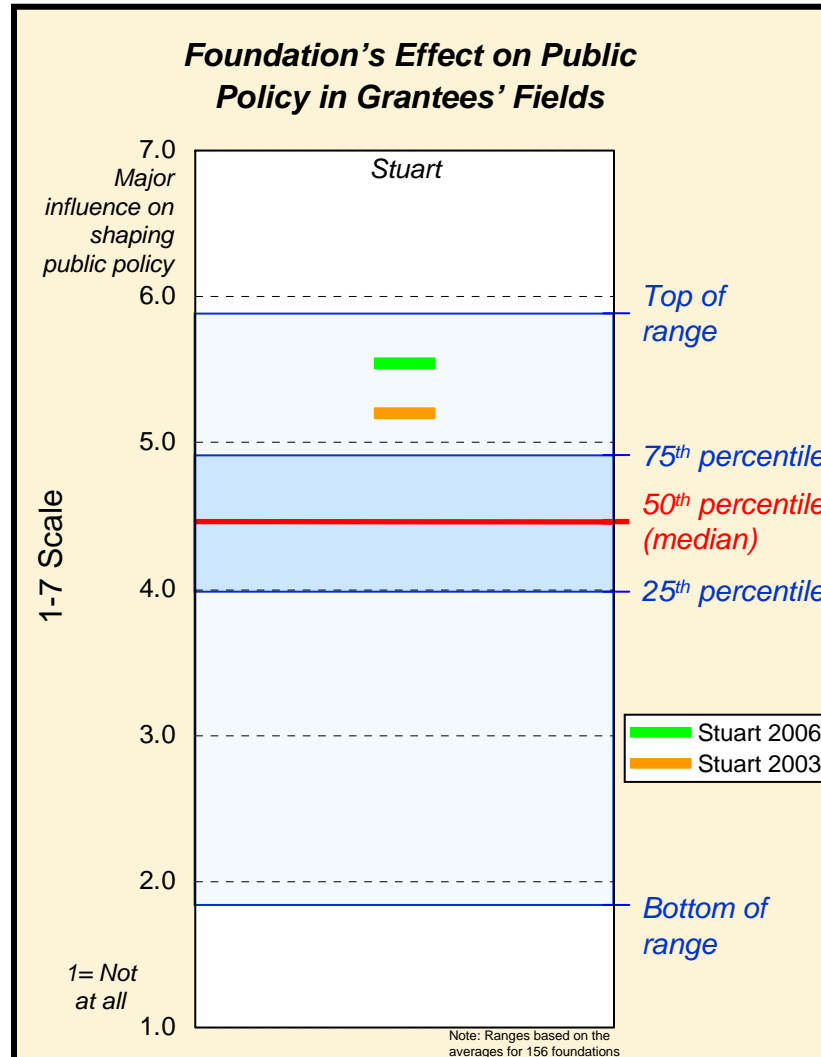
# Understanding and Advancing Knowledge in the Field

Grantees perceive Stuart to have an understanding of its fields of funding and an ability to advance knowledge in those fields that are above the ratings of the median foundation.



# Effect on Public Policy

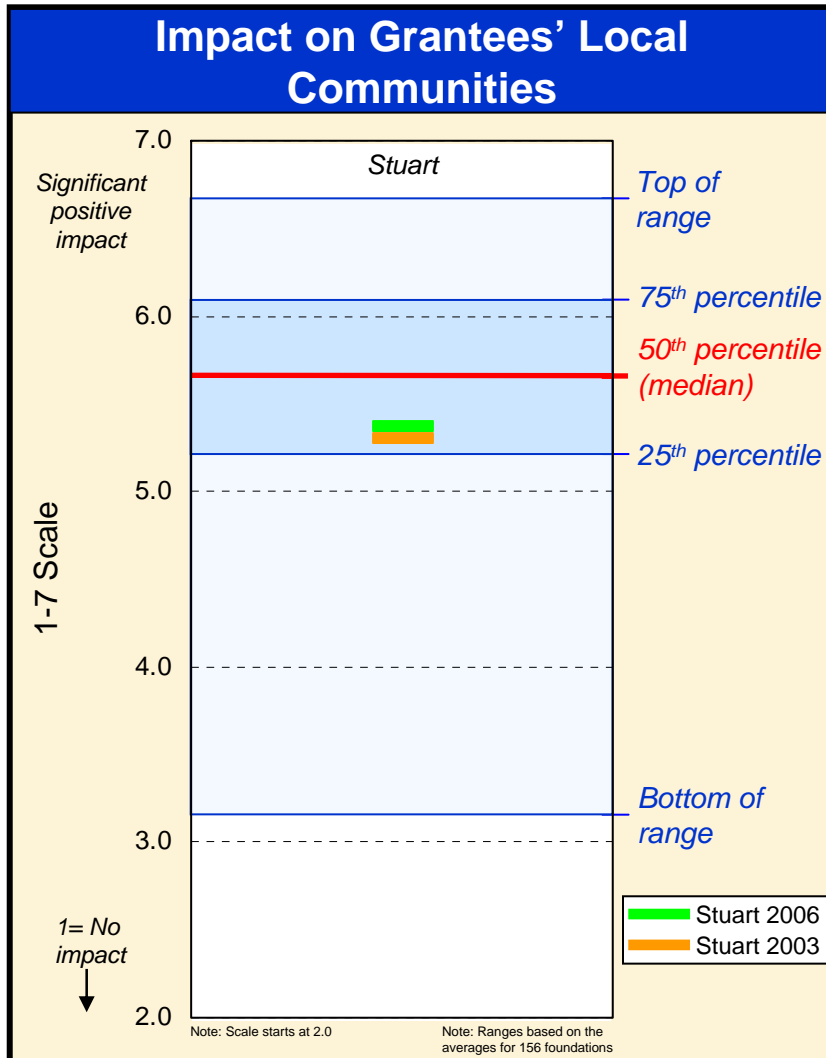
Stuart is seen as having more influence on public policy in its fields than the median foundation.



# Impact on Grantees' Local Communities

This measure highlights grantees' perceptions of foundations' impact on their local communities.

- ◆ *Stuart grantees rate the Foundation's impact on their local communities below the average rating received by the median foundation.*

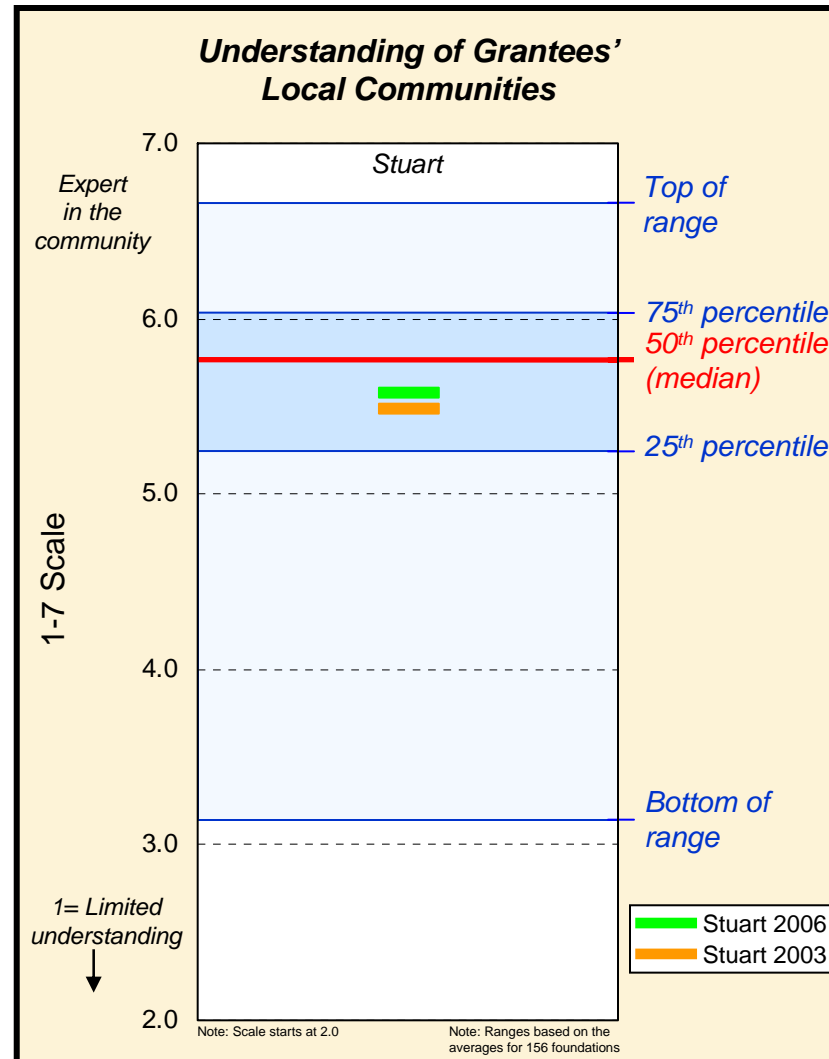


## Grantee Comments on Community Impact

- ◆ *"The Foundation's willingness to significantly invest in and partner with organizations has had a dramatic impact on our community, particularly through their support of newer, innovative organizations."*
- ◆ *"The Stuart Foundation supports numerous educational programs in this state. Most of these programs are 'cutting edge' and progressive. The Foundation's knowledgeable and gentle 'nudging' has ensured we stay focused on providing high-quality education for a very diverse population of kids."*
- ◆ *"Stuart has played a key role in moving California forward in child welfare – and the data now tells us that we are in fact moving forward."*
- ◆ *"Their vision of helping the community in the long-term has helped to bring together similar organizations in a dialogue to brainstorm solutions and partnerships."*

# Understanding of Grantees' Local Communities

Stuart grantees rate the Foundation's understanding of their local communities below the rating of the median foundation.

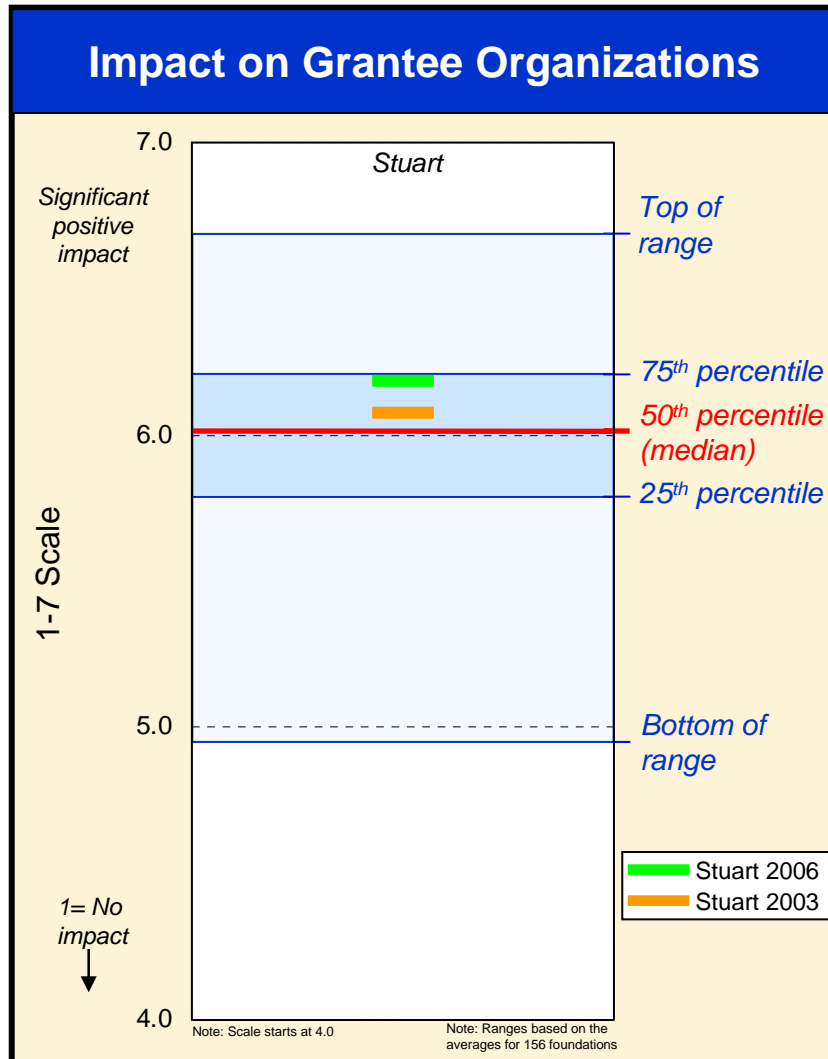


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# Impact on Grantee Organizations

Stuart grantees rate the Foundation's impact on their organizations more positively than the median foundation is rated by its grantees.

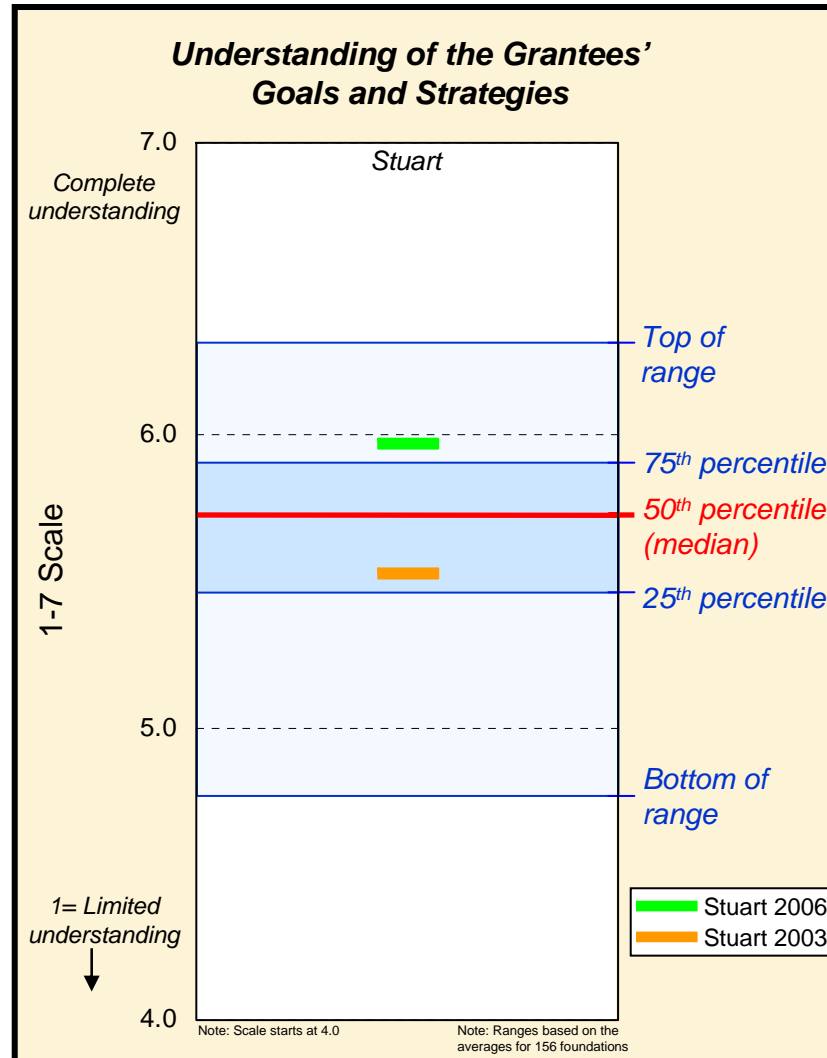


## Grantee Comments on Organizational Impact

- ◆ *“The Foundation has been a consistent supporter of [our organization]. They have provided thoughtful reflective questions, leading us to improve our own work products. In previous years their involvement had been overwhelming. Current staff have an excellent sense of balance and stewardship.”*
- ◆ *“A long-term relationship with the Stuart Foundation has given us the stability we need to be able to take risks with our work, to try out new approaches, and, occasionally, go down the wrong road without catastrophic effects to the organization. Stuart Foundation support has been the backbone of our growth as an organization and in our field.”*
- ◆ *“The Stuart Foundation is unique among funders in its multi-year support and interest in capacity building and collaboration among providers. This multi-year relationship makes their non-monetary assistance possible, because they understand our organization and our field and our community with their bigger stake.”*
- ◆ *“The Foundation had an immense impact on the credibility of our project and its geographic expansion.”*

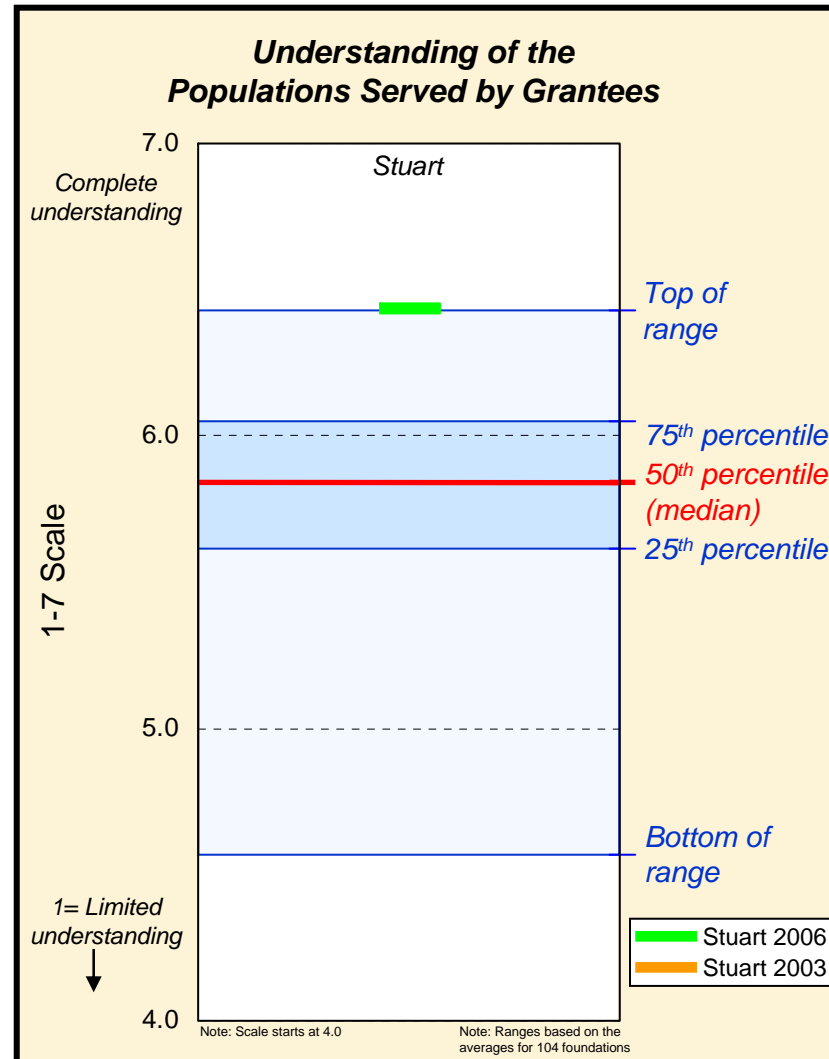
# Understanding of Grantees' Goals and Strategies

Stuart grantees rate the Foundation's understanding of their organizations' goals and strategies above the rating received by the median foundation.



# Understanding of the Populations Served by Grantees

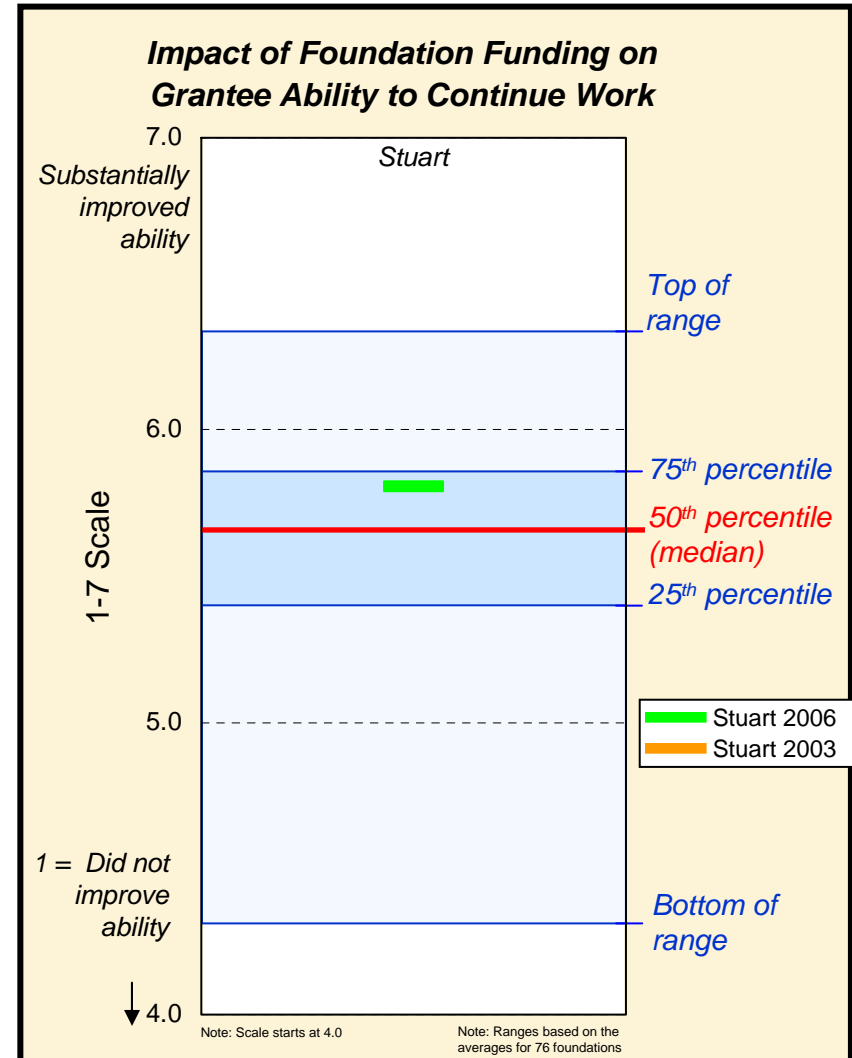
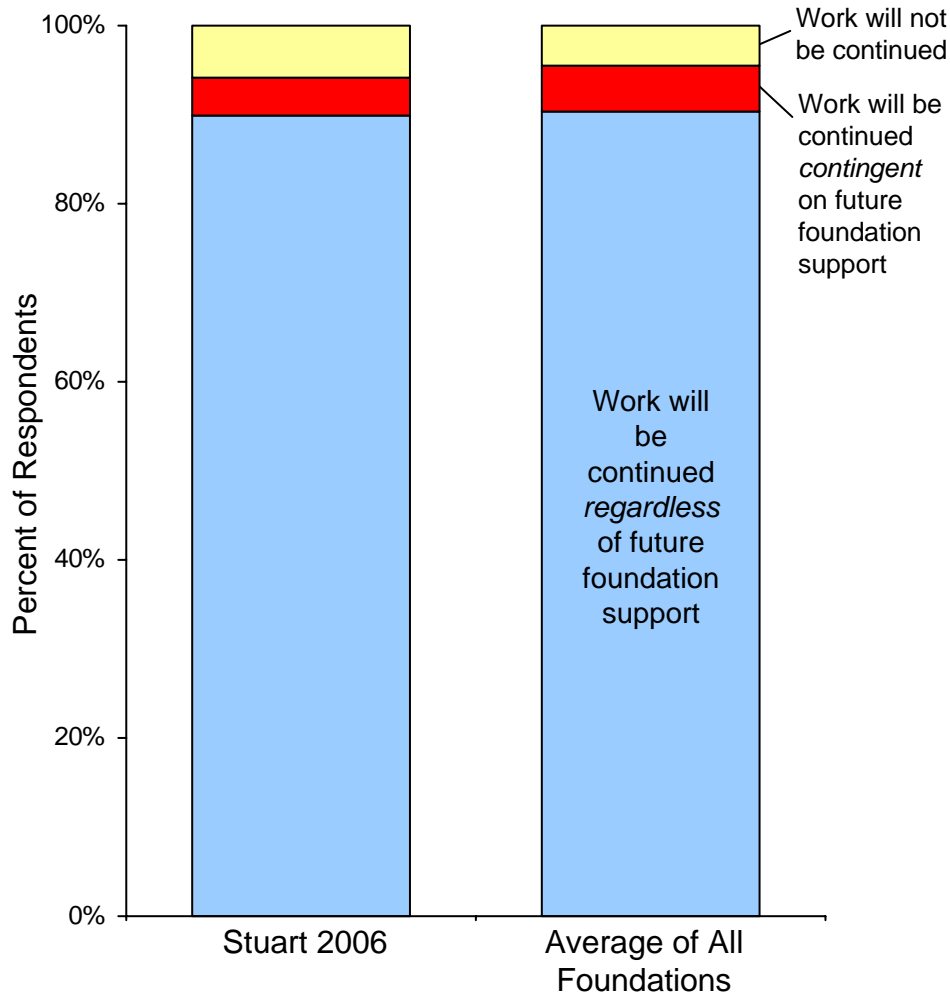
Stuart grantees rate the Foundation's understanding of the population(s) served by the grantee above the rating received by the median foundation.



# Sustainability of Funded Work

A typical proportion of Stuart grantees state that the work funded by their grant from the Foundation will be continued beyond the grant period *regardless* of future foundation support. Stuart grantees' rating of the Foundation's impact on their ability to continue their work is above the rating received by the median foundation.

**Plans for Funded Work Beyond the Grant Period**



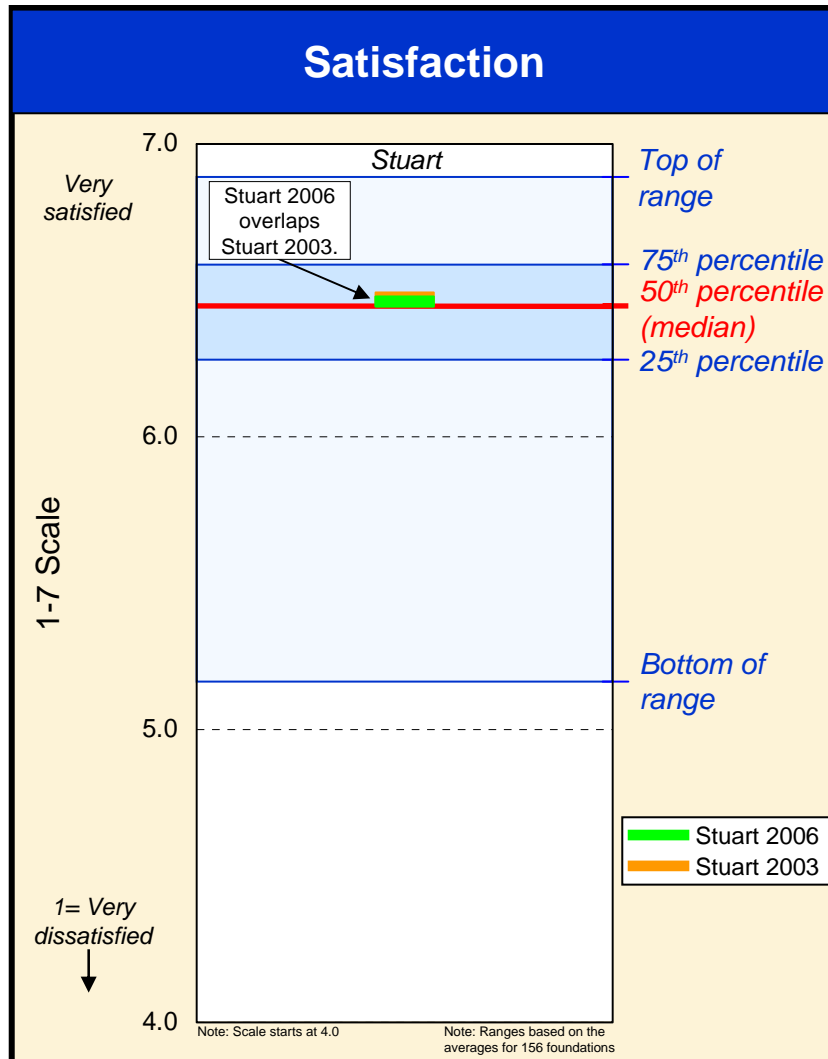
Note: Left-hand chart includes data about 76 foundations. Stuart 2003 rating not available because of changes to the survey instrument.

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# Satisfaction with the Foundation

Stuart grantees are as satisfied with their experience with the Foundation as grantees of the median foundation.



## Grantee Comments on Overall Satisfaction

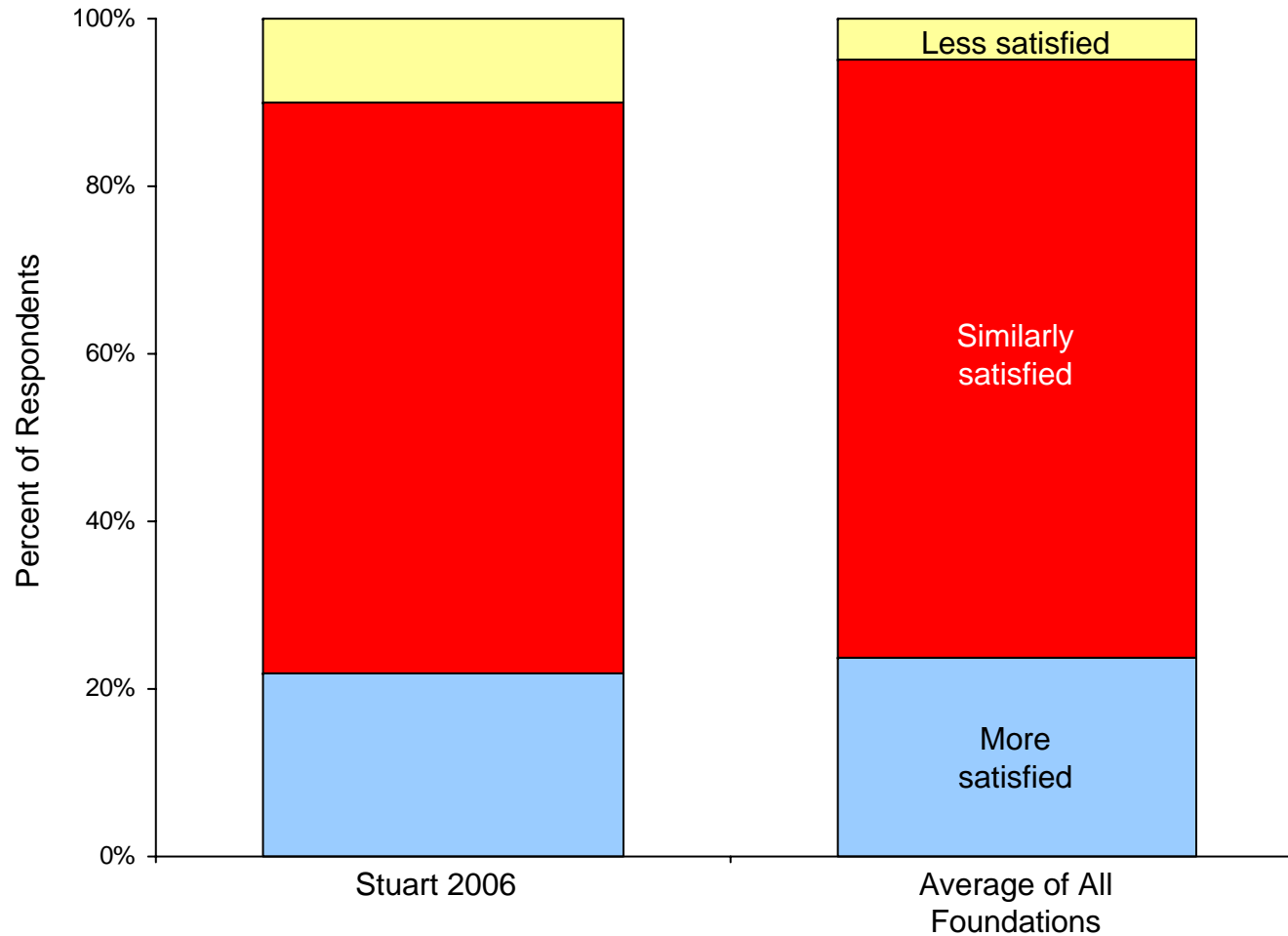
- ♦ “The Stuart Foundation is a stand-out in terms of the quality of work it inspires, the professionalism and competence of the staff, and the respect it garners from members of the education leadership and policy communities... The Foundation has a fine reputation for having well-seasoned and expert program officers. This foundation should be a model for other foundations with respect to the way in which staff manage their portfolios, communicate the board's goals and objectives, and inspire high-level work from their grantees.”
- ♦ “[The Foundation] has been completely professional. Has excellent knowledge of program area and best practices in program area. Willing to think outside the box. Feel there is a peer relationship – we share the same goals and are working together to discoverer the best way to achieve those goals.”
- ♦ “Overall, I have found the Stuart Foundation's operations, processes, interactions, and communications to be of the highest quality. They are clear, realistic, and consistent.”

**Survey-Wide Analysis Fact:** Three dimensions best predict grantee perceptions of satisfaction with their foundation funders: 1) *Quality of Interactions with Foundation Staff:* fairness, responsiveness, approachability; 2) *Clarity of Communications of a Foundation's Goals and Strategy:* clear and consistent articulation of objectives; 3) *Expertise and External Orientation of the Foundation:* understanding of fields and communities of funding and ability to advance knowledge and affect public policy. For more on these findings and resulting management implications, please see CEP's report, *Listening to Grantees: What Nonprofits Value in Their Foundation Funders.*

# Satisfaction Relative to Last Year

A larger than typical proportion of Stuart grantees report that they are less satisfied with the Foundation than they were last year.

*Change in Satisfaction with the Foundation from Last Year*



Note: Question asked of grantees that were receiving funding from the Foundation last year as well as this year. This chart includes data about 76 foundations. Stuart 2003 rating not available because of changes to the survey instrument.

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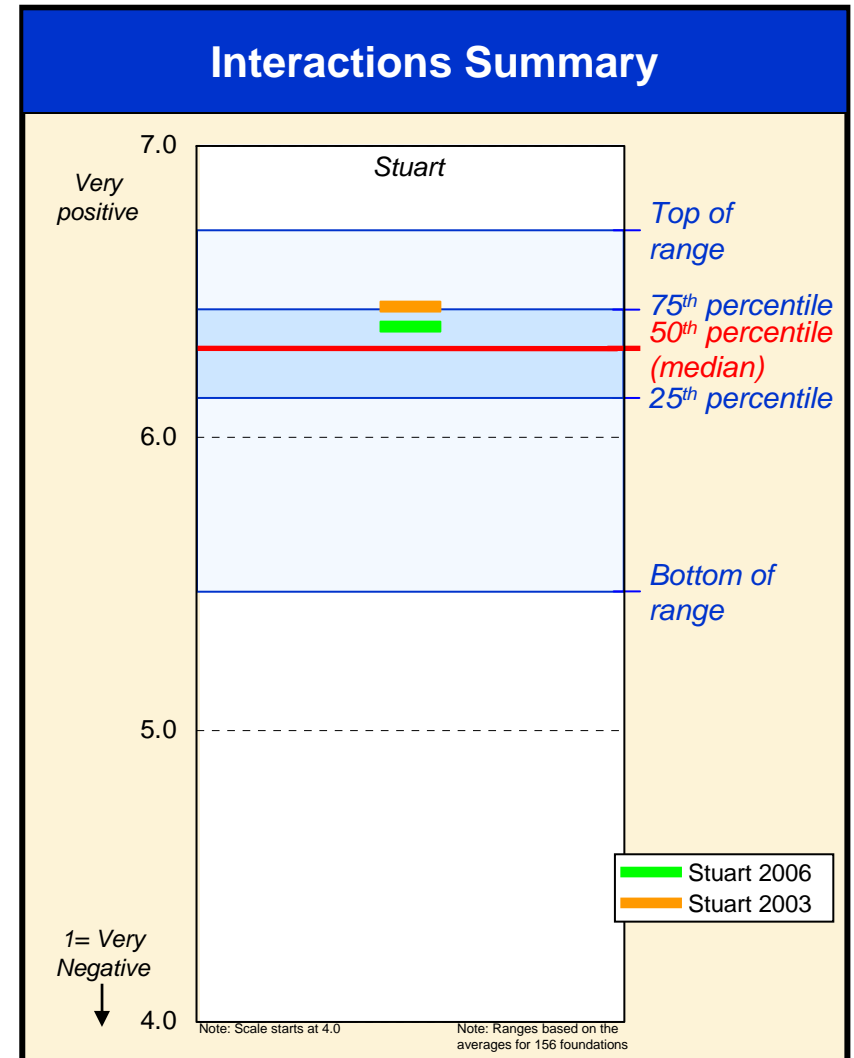
# Grantee Interactions Summary

The Grantee Interactions Summary describes grantees' perceptions of their interactions with foundations.

- ◆ *Grantees rate Stuart as positively as the median foundation is rated by its grantees in terms of the quality of interactions with the Foundation.*

This composite measure includes:

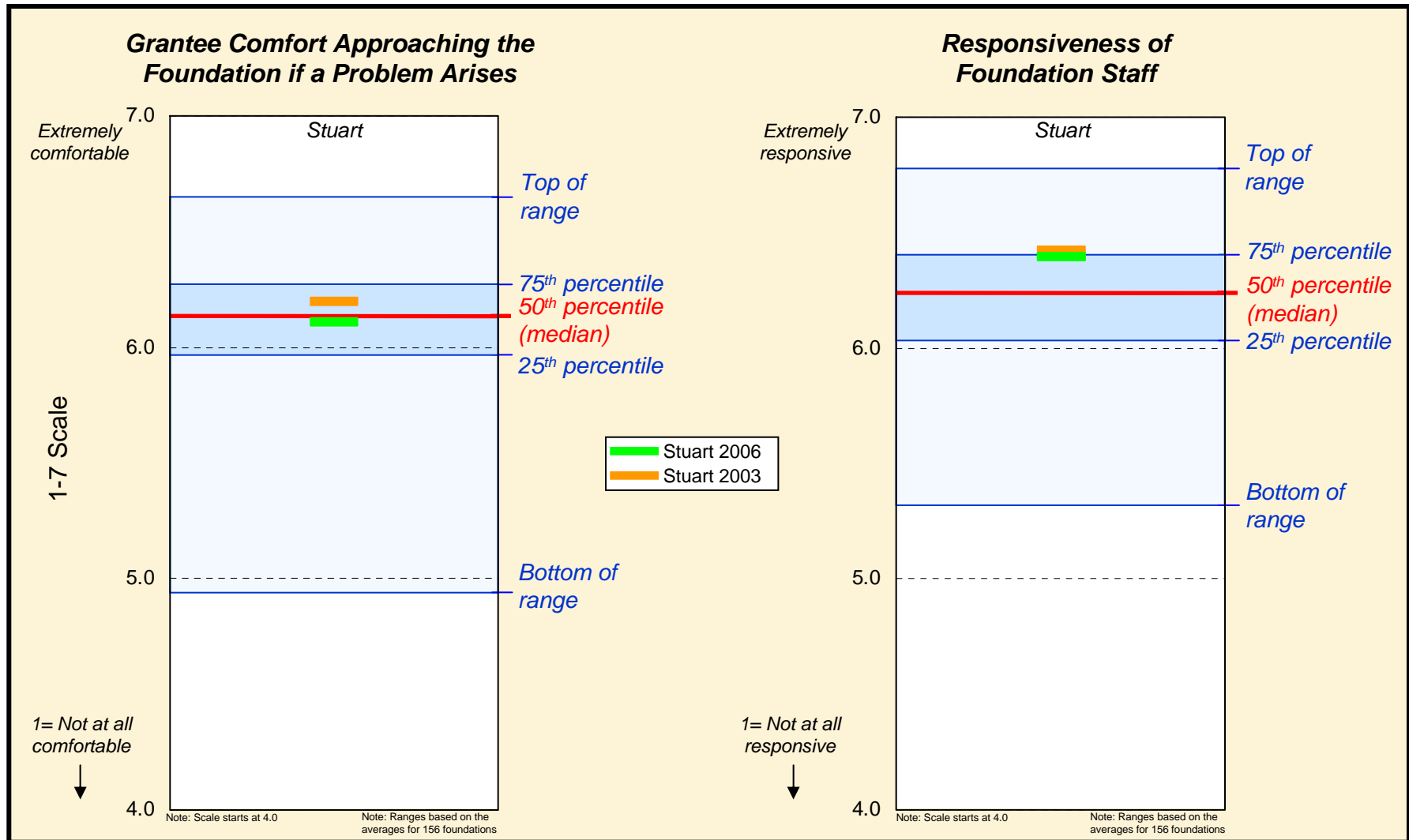
- *How comfortable grantees feel approaching the Foundation if a problem arises*
- *Overall responsiveness of the Foundation staff*
- *Overall fairness of the Foundation's treatment of grantees*



Note: Index created by averaging grantee ratings of comfort approaching the Foundation if a problem arises, overall responsiveness of the Foundation staff, and overall fairness of the Foundation's treatment of grantees – ratings which are highly correlated.

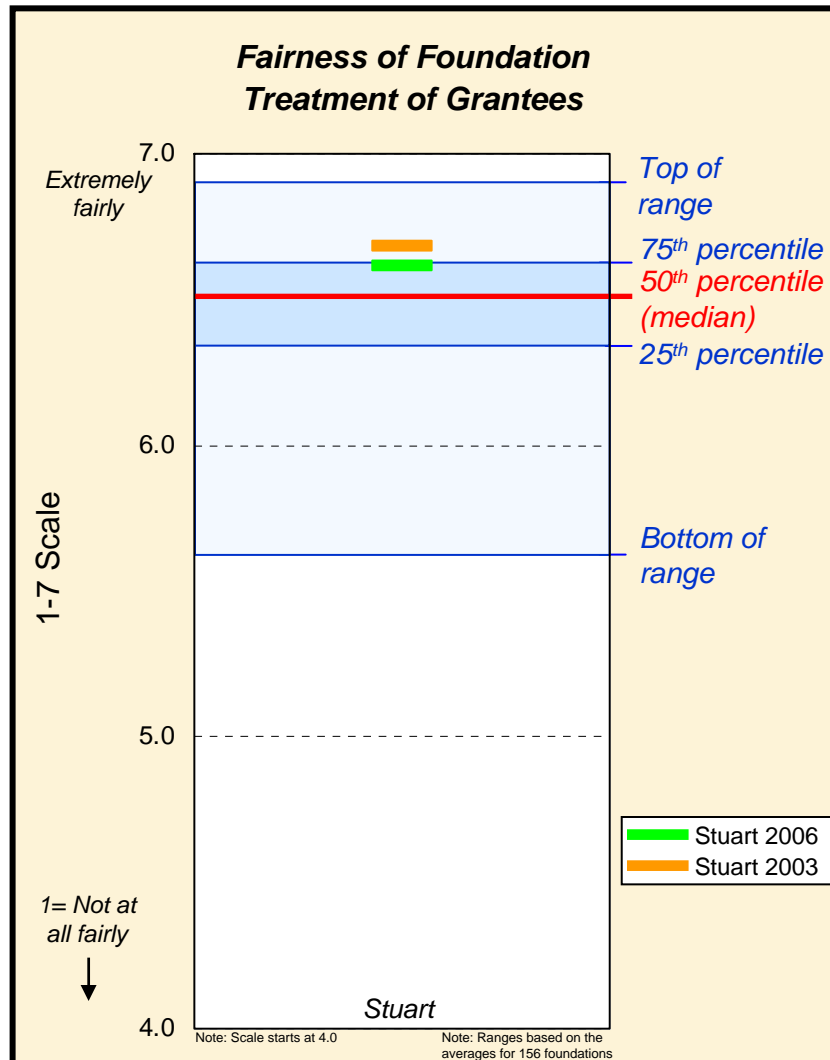
# Interactions Measures (1)

Stuart grantees rate the Foundation as positively than the median foundation is rated by its grantees in comfort in approaching the Foundation if a problem arises and responsiveness of Foundation staff.



## Interactions Measures (2)

Stuart grantees rate the Foundation as positively as the median foundation is rated by its grantees in fairness of treatment of grantees.



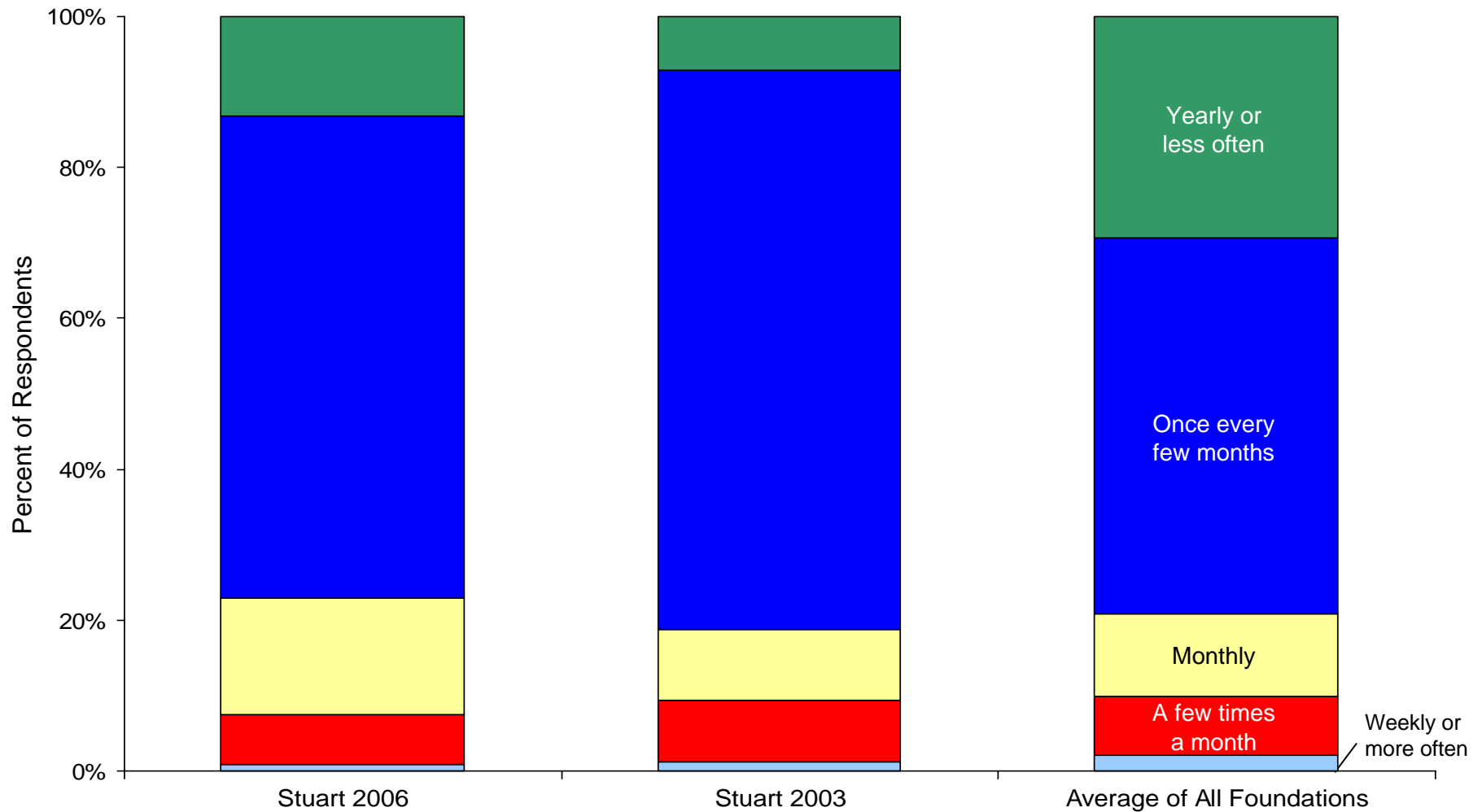
### Grantee Comments on Interactions

- ◆ *“My experience ... has been extremely positive. [Our program officer] is knowledgeable, smart, helpful, asks good questions and marked helpful, supportive suggestions that improve the work.”*
- ◆ *“In our interaction the Stuart Foundation was flawless. They were always on the same page and were uniformly helpful.”*
- ◆ *“Earlier in our long relationship with the Stuart Foundation, we had close working relationships, frequent communication and clear expectations. In the last year, we have had minimal communication and not found the Foundation staff responsive.”*
- ◆ *“I have always been impressed with the quality of their staff and commitment to make a difference. They feel like partners rather than stand-offish funders.”*
- ◆ *“There is a long history ... of smart, insightful staff asking good and challenging questions that serve to question our assumptions, challenge us, and improve our overall work and approach.”*

# Frequency of Interactions

The majority of Stuart grantees report interacting with their program officers once every few months or more often.

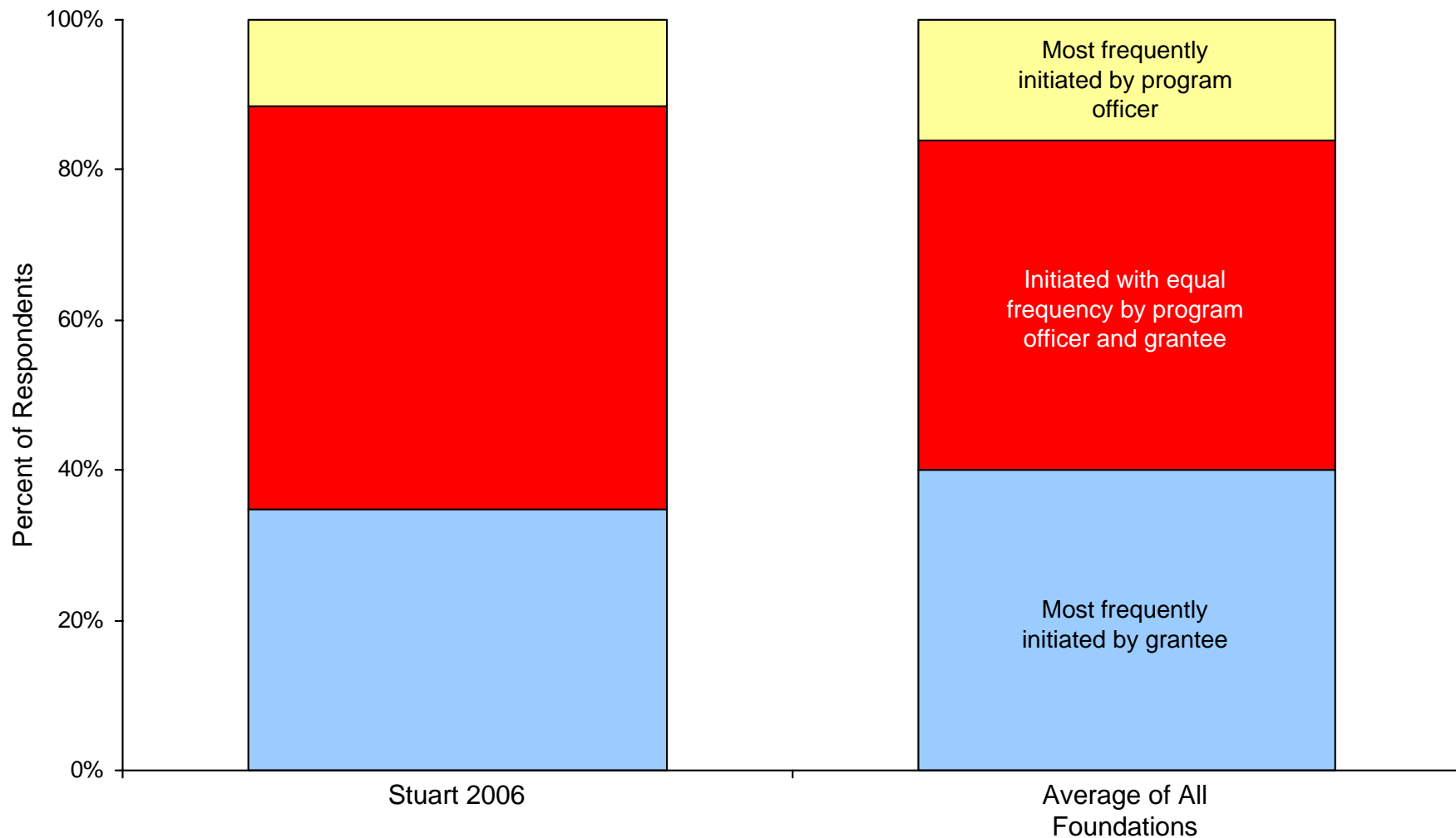
*Frequency of Grantee Contact with Program Officers During Grant*



# Initiation of Interactions

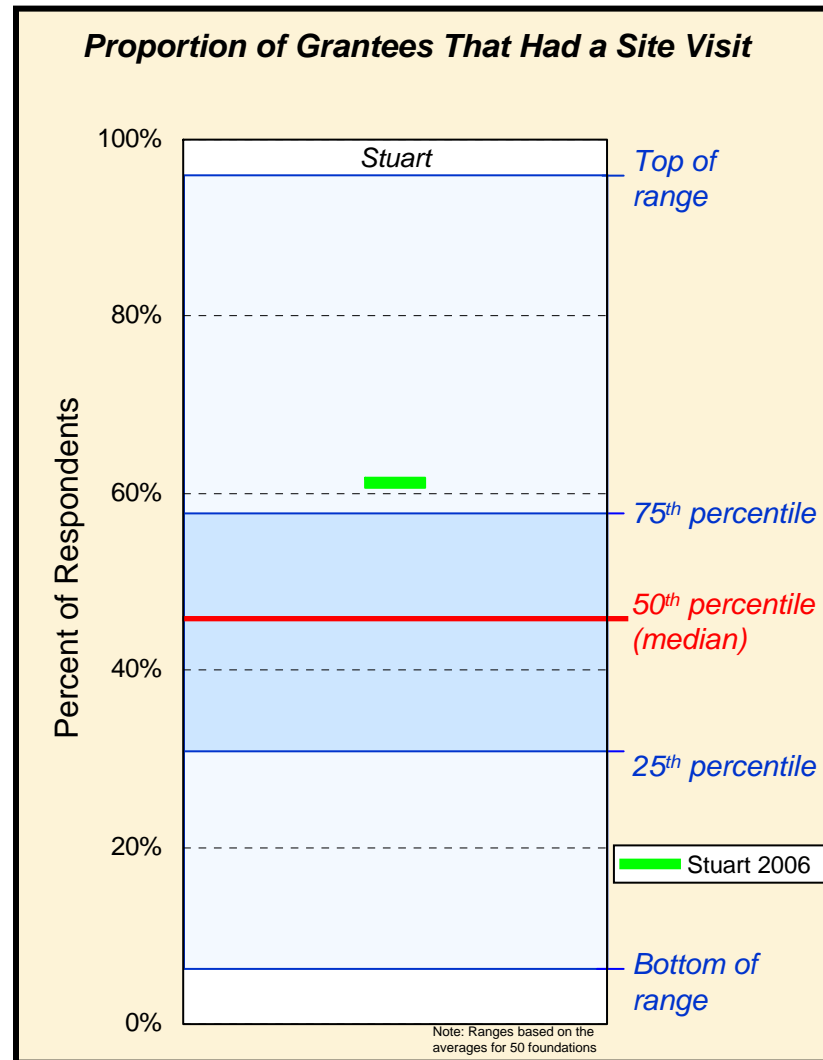
A larger than typical proportion of Stuart grantees report that interactions with Foundation staff were initiated with equal frequency by program officer and grantee.

*Initiation of Grantee Contact with Program Officers During Grant*



# Proportion of Grantees That Had a Site Visit

Stuart conducts site visits to a larger proportion of its grantees than typical.



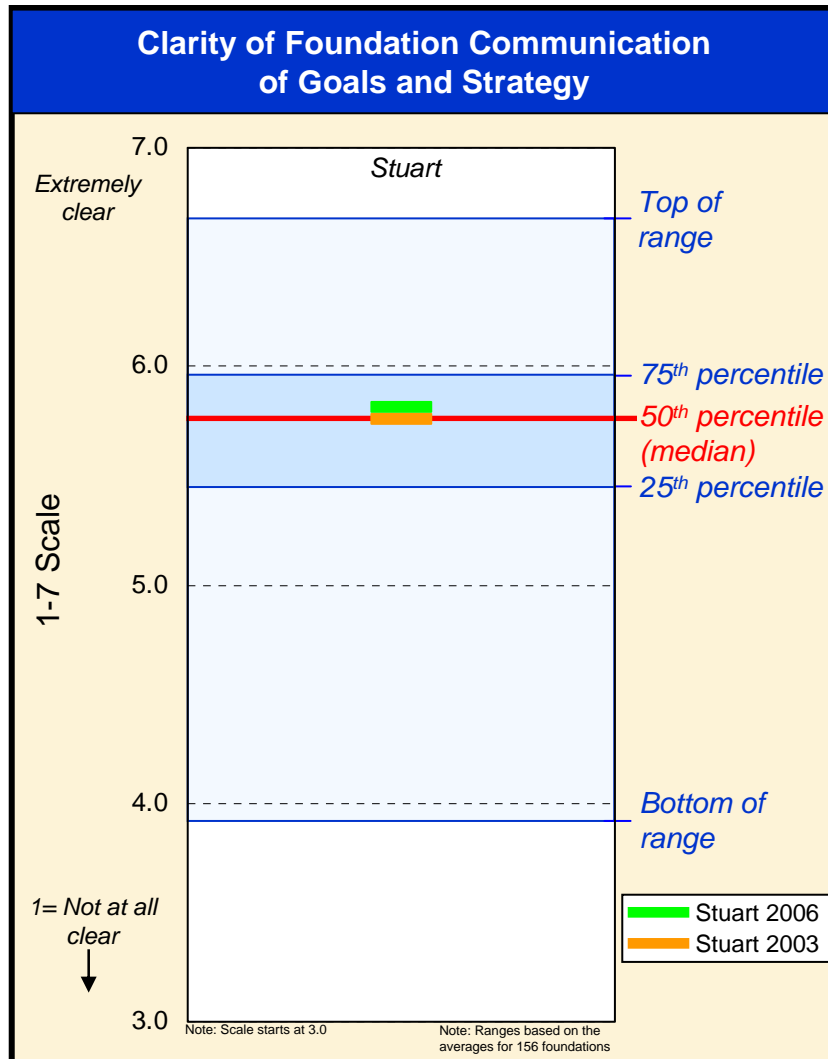
Note: Chart created by aggregating data about site visits that occurred during the selection, reporting, and evaluation processes and during the course of the grant. Stuart 2003 rating not available because of changes to the survey instrument.

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# Communication of Goals and Strategy

Stuart grantees rate the Foundation's clarity of communication of its goals and strategy similar the rating of the median foundation.

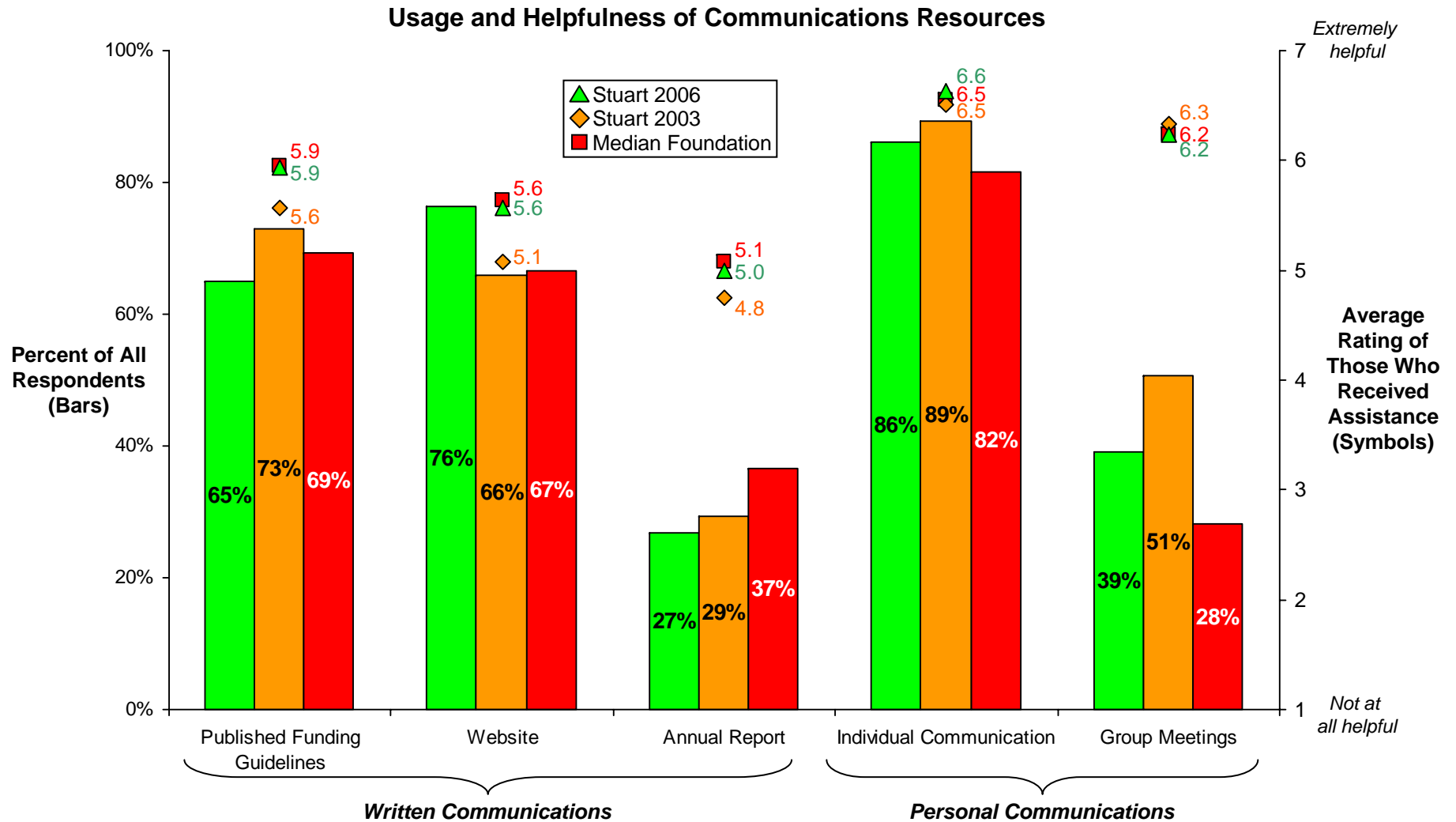


## Grantee Comments on Clarity of Communications

- ◆ *"The Foundation has been undergoing a strategic planning and organizational change process for several years now. During this time the communication from the Foundation about its priorities and processes has been somewhat vague or uncertain."*
- ◆ *"[Our program officer] was very clear about Foundation expectations and whether there might be a match for our organization with the Foundation goals. [Our program officer] worked closely with us to determine alignment and to help us to wisely invest our time in pursuit of support. [Our program officer] was also very helpful in determining next steps for us to take."*
- ◆ *"We found unusually high-quality communication with the program officer and staff regarding content, but found disarming inconsistencies with process – written communications, oral and actual activity all being different. Examples include written communication that an LOI will be responded to, and then dates missed without communication from the Foundation. Our attempts to follow-up most often resulted in calls not returned [and] emails not responded to. When we communicate, the Stuart Foundation's professionalism is extremely high, yet when trying to receive timely information in response, or when we have attempted to communicate with the Foundation, or outreach is often not responded to."*
- ◆ *"Excellent communication and help from the Foundation. The grant processes were clear and easy to follow."*

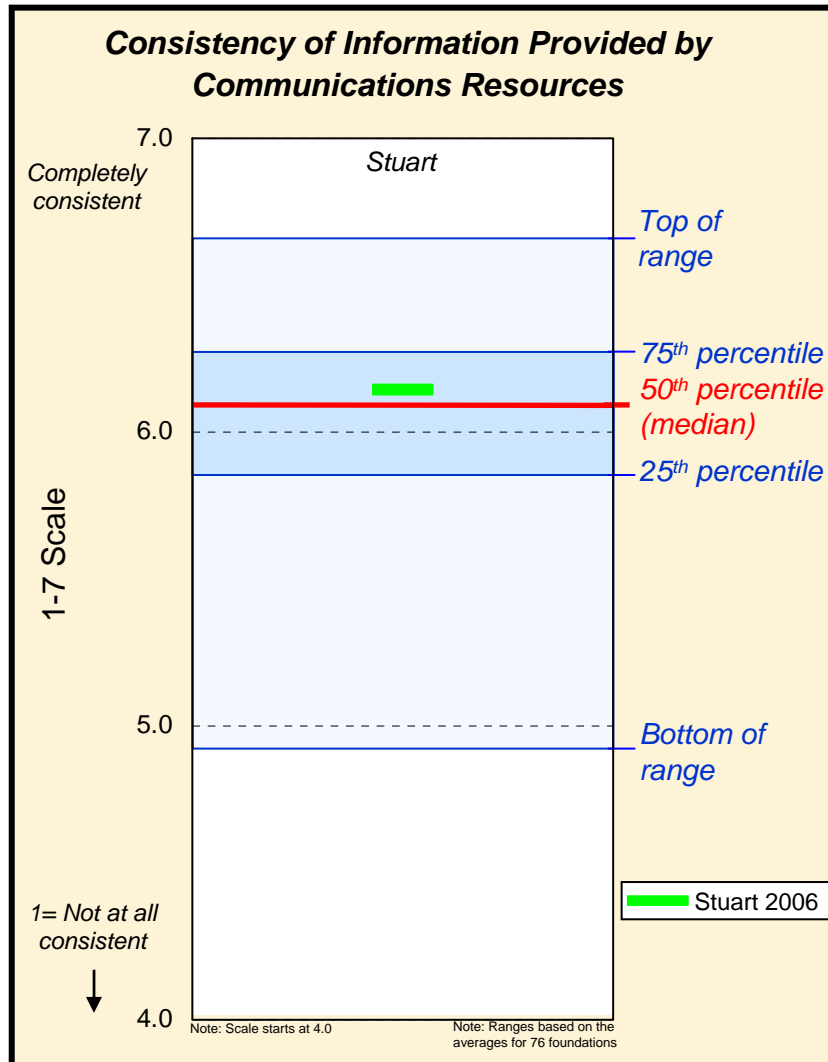
# Communications Resources

Smaller than typical proportions of Stuart grantees report accessing the Foundation's different communications resources (except its website) to learn about the Foundation. Stuart's written and personal communications are rated as helpful as typical, an improvement from 2003.



# Consistency of Communications

Stuart grantees rate the Foundation's communications as similarly consistent as the communications resources of the median foundation.



*Survey-Wide Analysis Fact: Consistency of Communications, both personal and written, is the best predictor of grantee ratings of a foundation's clarity of communication of its goals and strategy. Other predictors are 1) Quality of Interactions with Foundation Staff: fairness, responsiveness, approachability and 2) The helpfulness of a foundation's selection and reporting/evaluation processes in strengthening grantees' programs and/or organizations – key moments that can reinforce or undermine foundation messages. For more on these findings, key resources most valued by grantees, and management implications, please see CEP's report, *Foundation Communications: The Grantee Perspective*.*

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# Non-Monetary Assistance Summary

The Non-Monetary Assistance Summary describes the frequency and value of a foundation's provision of assistance beyond the grant check.

- ◆ *Stuart is above the median foundation on this measure.*

## Non-Monetary Assistance Activities Included in Summary

### MANAGEMENT ASSISTANCE

- General management advice
- Strategic planning advice
- Financial planning/accounting
- Development of performance measures

### FIELD-RELATED ASSISTANCE

- Encouraged/facilitated collaboration
- Insight and advice on your field
- Introductions to leaders in field
- Provided research or best practices
- Provided seminars/ forums/ convenings

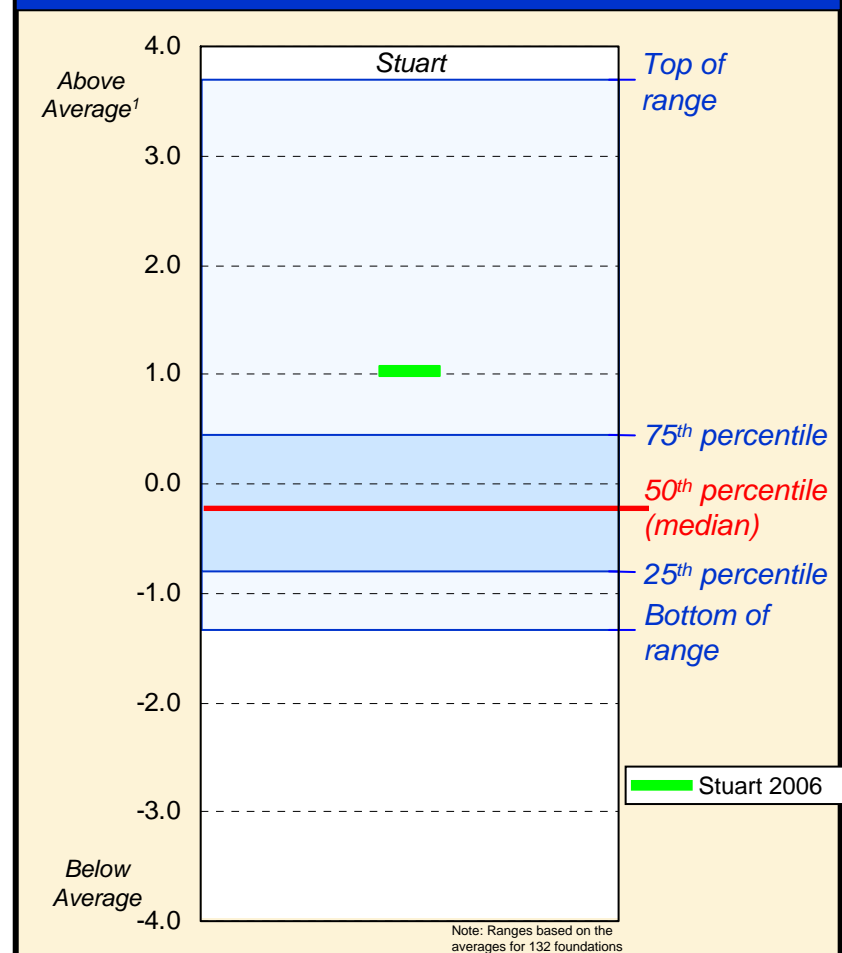
### OTHER ASSISTANCE

- Board development/ governance assistance
- Information technology assistance
- Communications/ marketing/ publicity assistance
- Use of Foundation facilities
- Staff/management training

This composite measure includes:

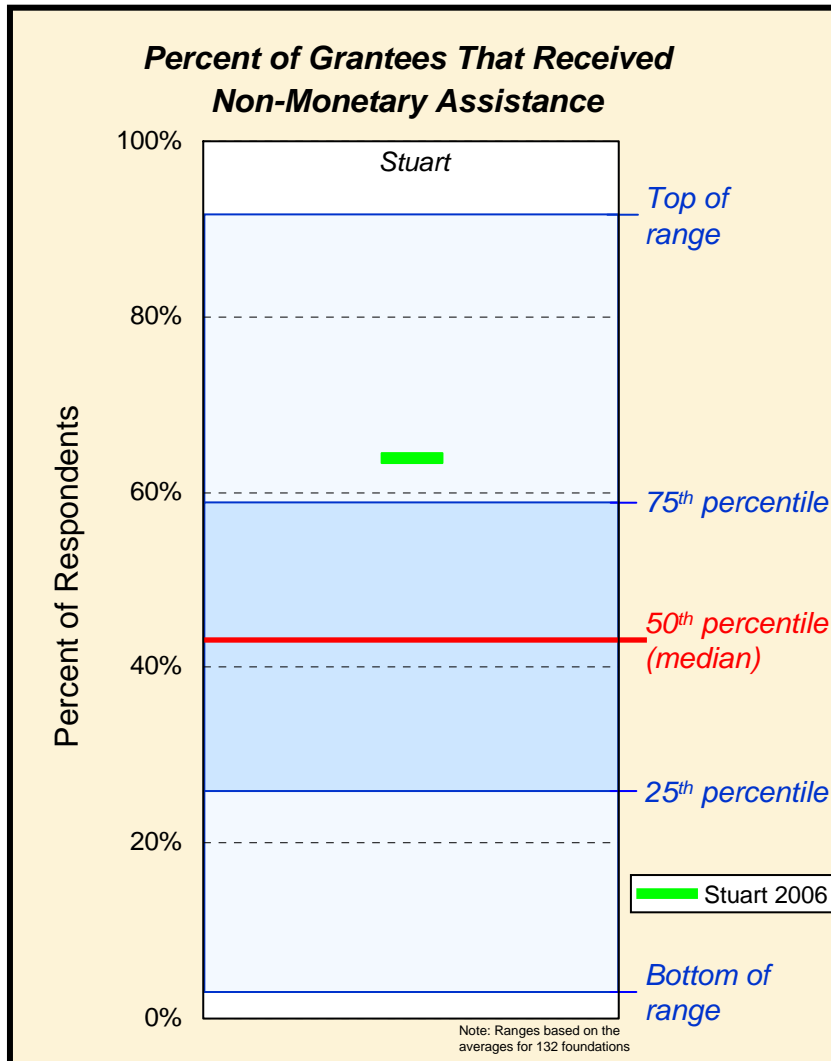
- *Whether grantees received individual assistance activities from the foundation or third parties*
- *Ratings of helpfulness of assistance activities*

## Non-Monetary Assistance Summary



# Non-Monetary Assistance

Nearly 60 percent of Stuart grantees report receiving non-monetary assistance, a higher proportion than is typical.

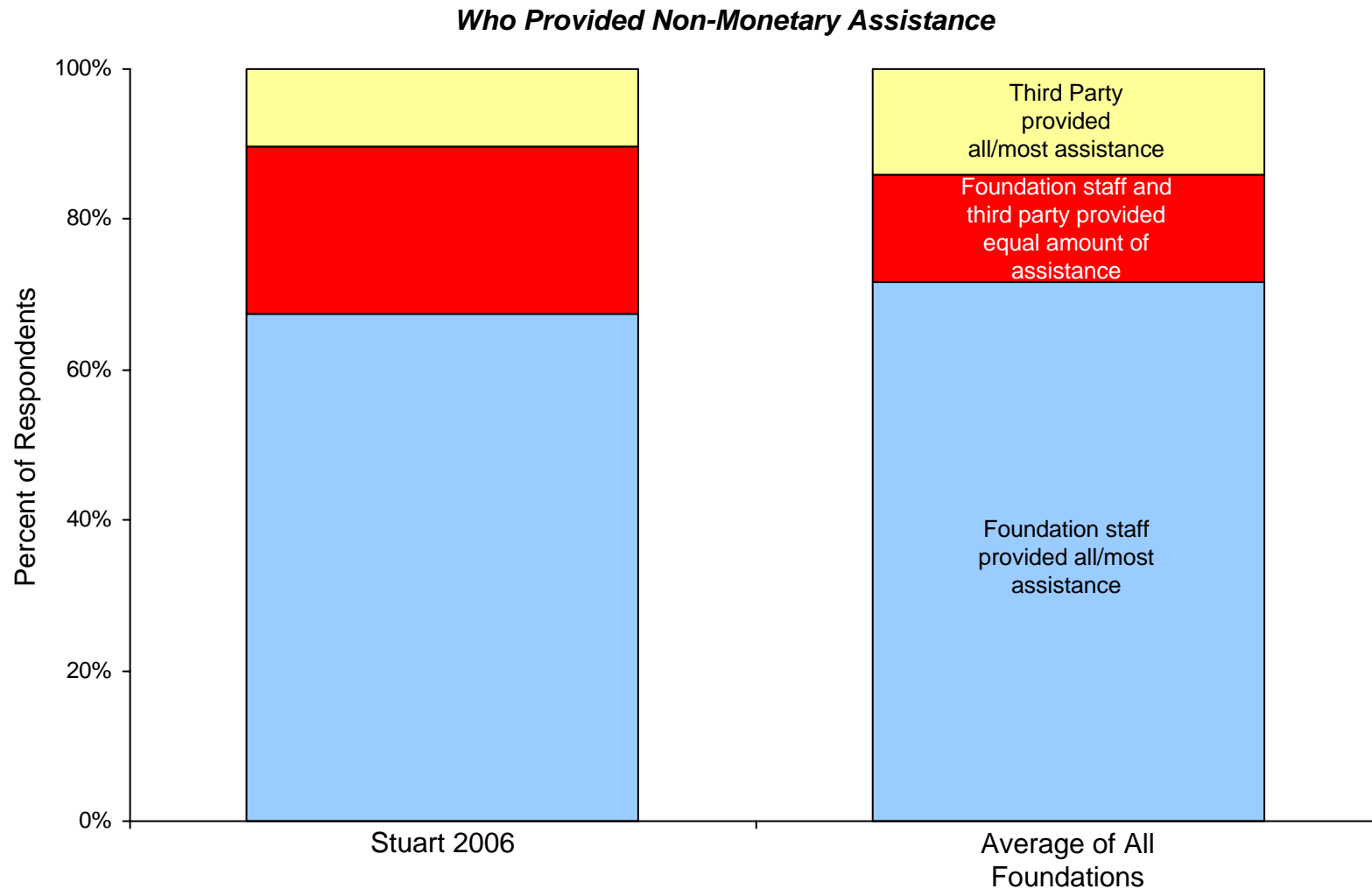


## Grantee Comments on Non-Monetary Assistance

- ◆ *“The Foundation staff helped facilitate meetings at their office to further the work of our organizations and other like-minded organizations in the community.”*
- ◆ *“Our program officer's advice and smart questions over the years have helped us navigate our way toward significant and sustained growth.”*
- ◆ *“Wonderful advice and insight to assist is sustaining our program in the future.”*
- ◆ *“The Foundation is a strong leader in the field of child welfare – very knowledgeable and proactive. [They are] great at bringing groups together to move forward with positive change.”*
- ◆ *“The Foundation has had a positive impact on the organization by providing ongoing technical support and assistance as needed.”*

# Who Provided Non-Monetary Assistance

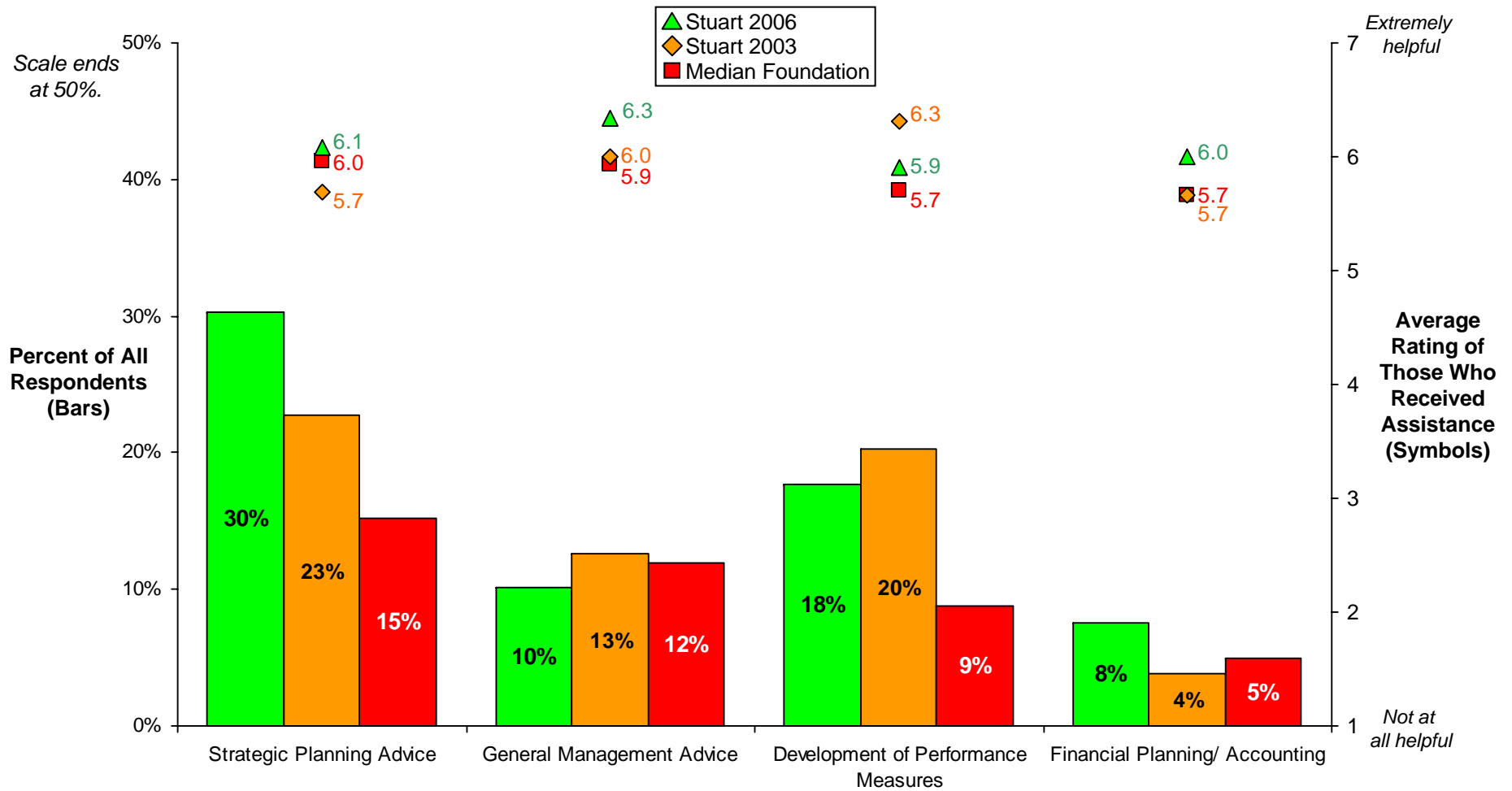
A smaller than typical proportion of Stuart grantees report that foundation staff provided all or most of the assistance they received.



# Management Assistance Activities & Helpfulness

A larger proportion of Stuart grantees report receiving strategic planning advice and assistance in the development of performance measures than grantees of other foundations. The helpfulness of different management assistance activities is rated at or above the ratings received by the median foundation.

Frequency and Helpfulness of Management Assistance Activities

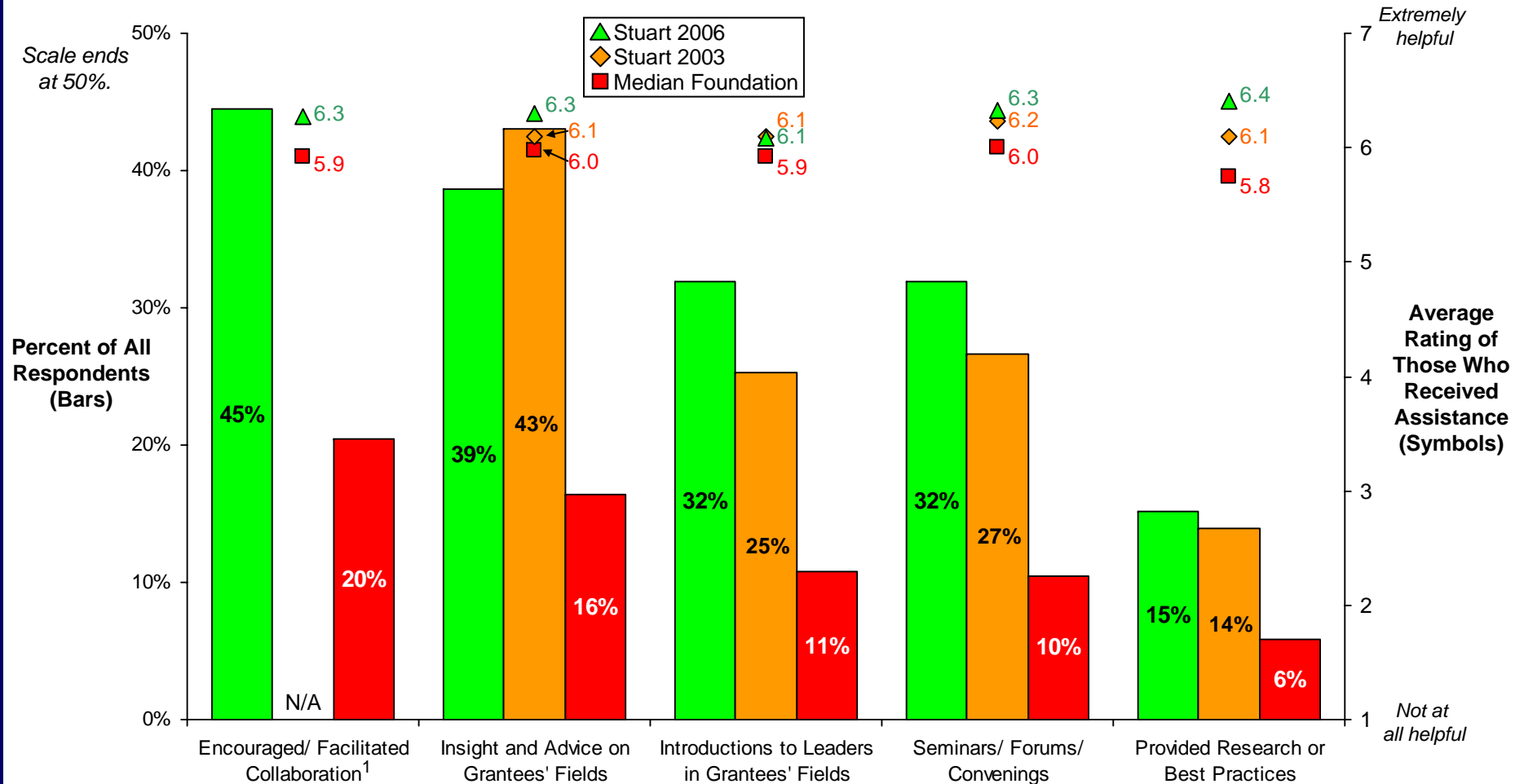


Note: Percent of grantees receiving non-monetary assistance is an overall percentage including those who answered that they did not receive assistance from the foundation. This chart includes data about 132 foundations.

# Field-Related Assistance Activities & Helpfulness

A much larger proportion of Stuart grantees than typical are provided field-related assistance, and the helpfulness of these activities is rated above the activities provided by the median foundation.

Frequency and Helpfulness of Field-Related Assistance Activities

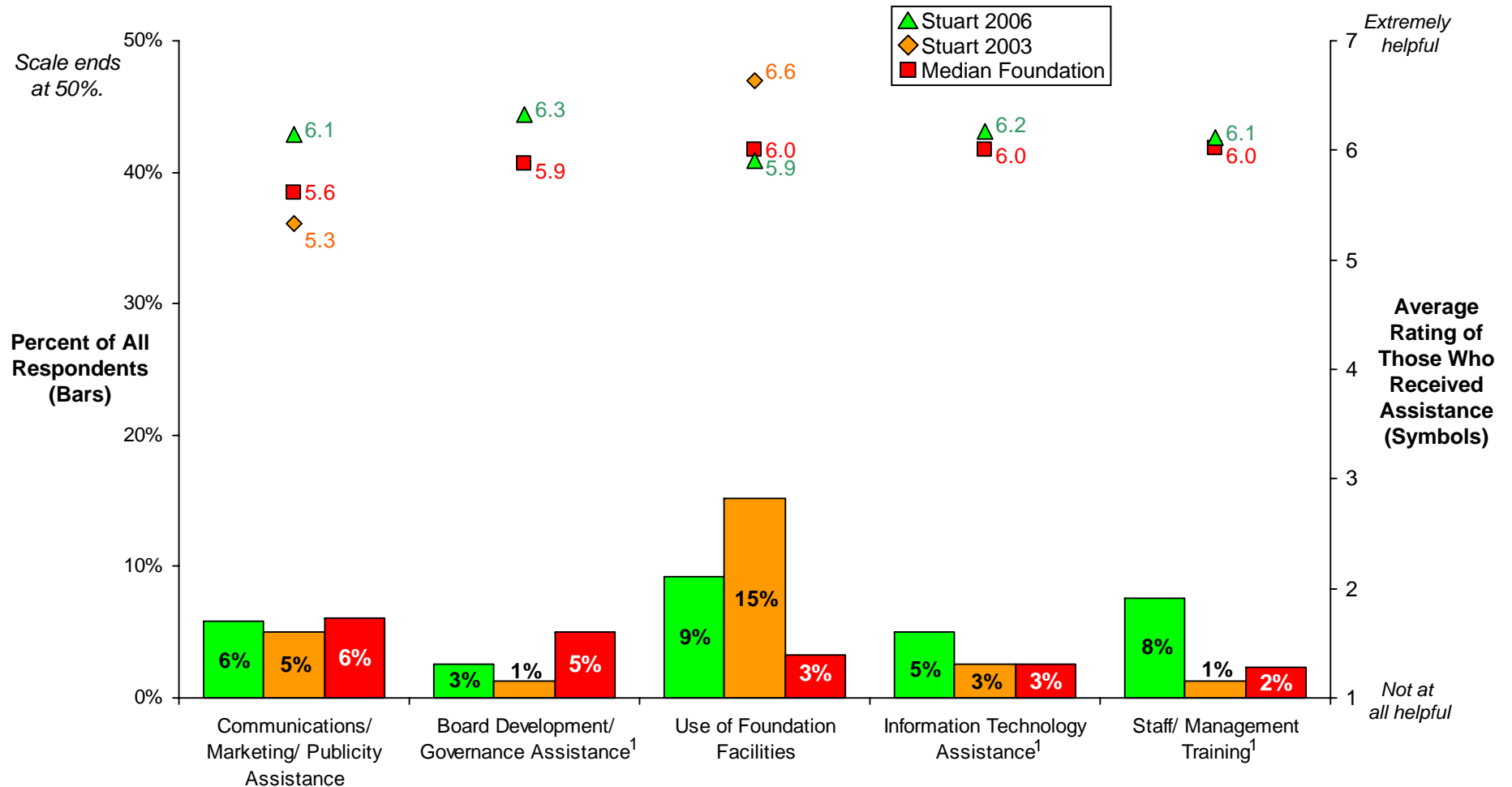


1: Stuart 2003 data unavailable because of changes in the survey instrument  
 Note: Percent of grantees receiving non-monetary assistance is an overall percentage including those who answered that they did not receive assistance from the foundation. This chart includes data about 132 foundations.

# Other Support Activities & Helpfulness

Stuart provides the use of its facilities and staff/management training to grantees more frequently than the median foundation.

Frequency and Helpfulness of Other Assistance Activities



1: Stuart 2003 rating not shown because of too few respondents.

Note: Percent of grantees receiving non-monetary assistance is an overall percentage including those who answered that they did not receive assistance from the foundation. This chart includes data about 132 foundations.

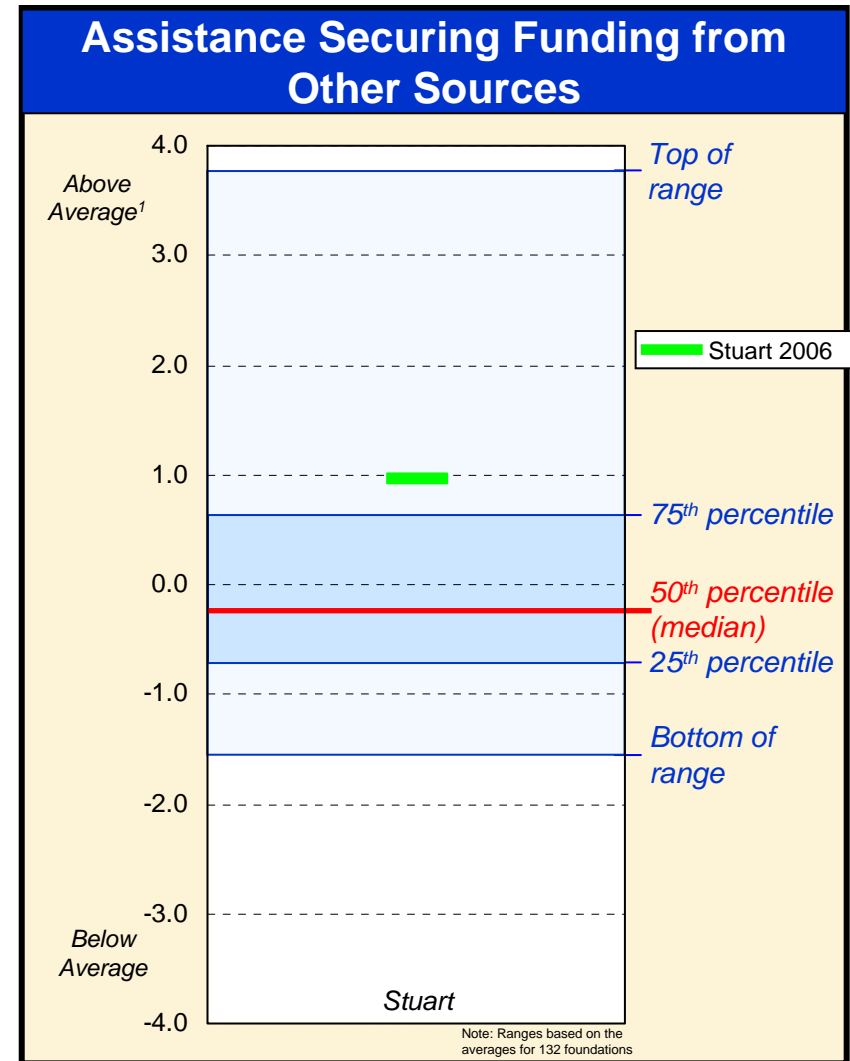
# Assistance Securing Funding from Other Sources

This summary highlights grantees' perceptions of a foundation's help in grantees' efforts to secure additional funding from other sources.

- ◆ *Stuart is rated above the median foundation on this measure.*

This composite measure includes:

- *Frequency of active foundation assistance in obtaining additional funding from other sources*
- *The impact of those efforts*

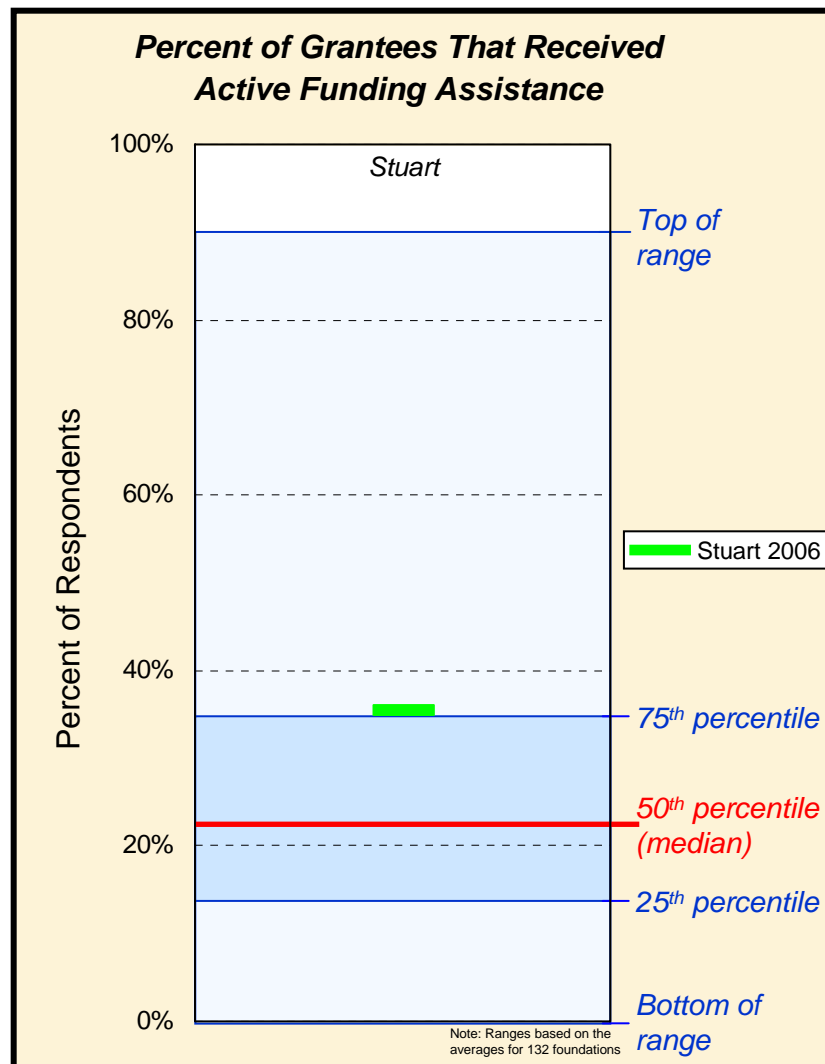


1: Each unit in the summary graph is one standard deviation.

Note: Stuart 2003 rating not available because of changes to the survey instrument.

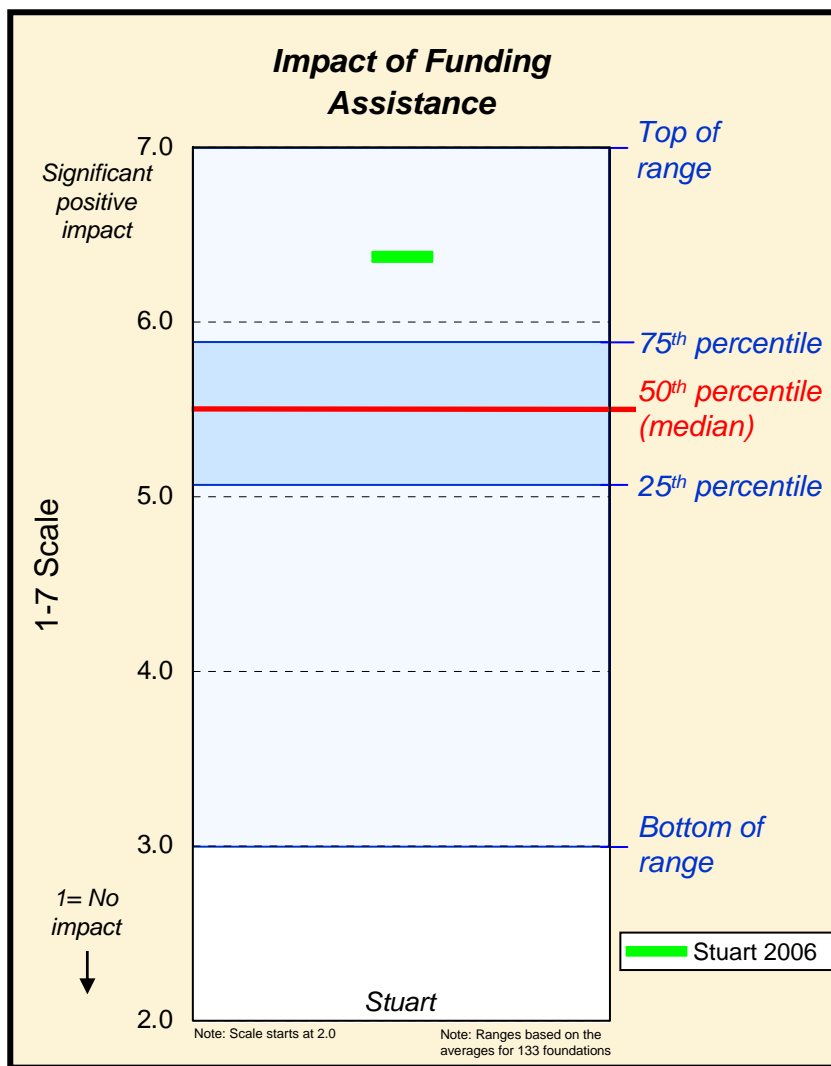
# Active Help in Securing Funding from Other Sources (1) Grantee Perception Report<sup>®</sup> Excerpt

A larger than typical proportion of Stuart grantees report receiving active funding assistance from the Foundation.



# Active Help in Securing Funding from Other Sources (2) Grantee Perception Report<sup>®</sup> Excerpt

The impact of Stuart's funding assistance is rated more positively than the rating received by the median foundation.



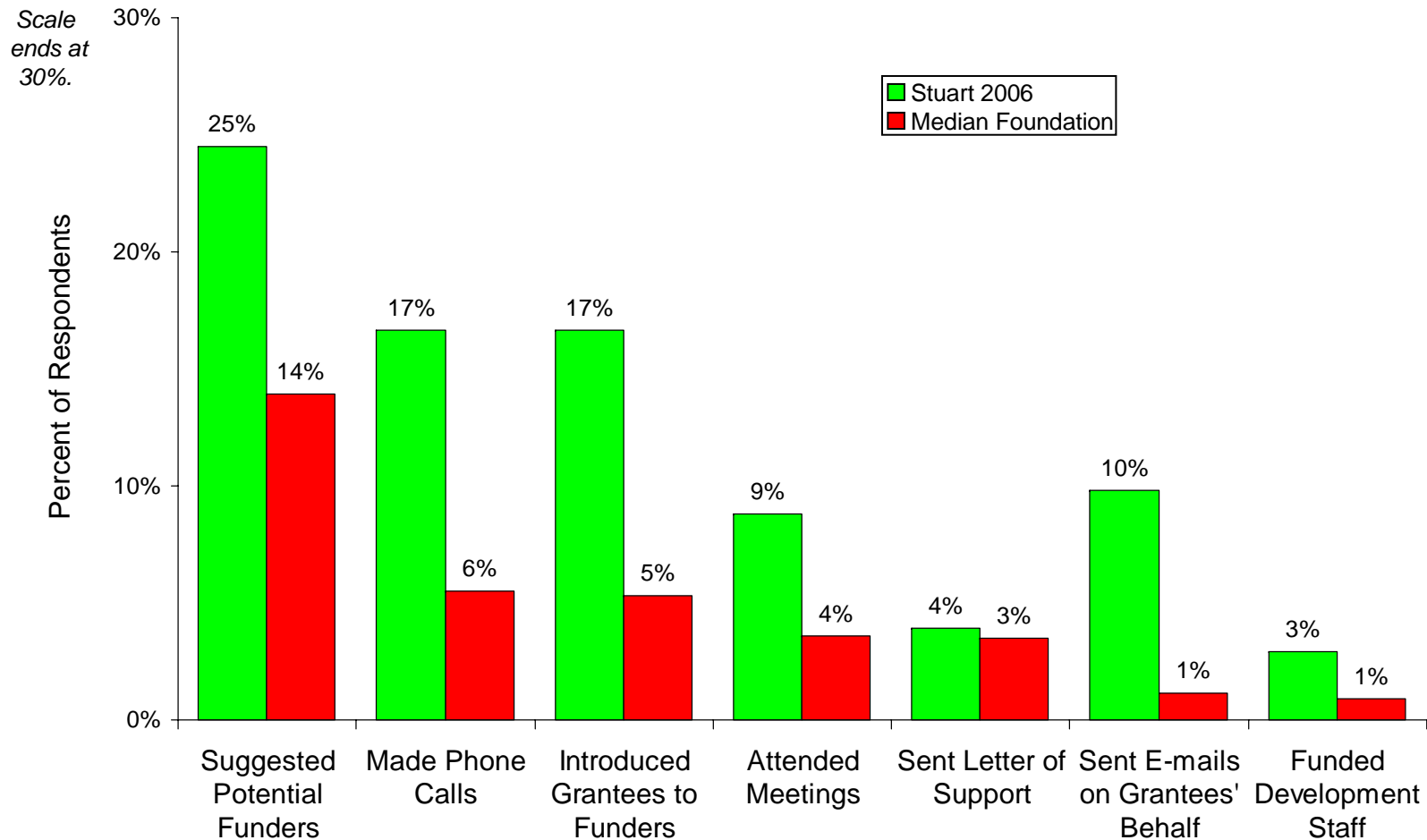
## Grantee Comments on Funding Assistance

- ◆ “The Foundation was our advocate with other funders. Their participation increased our ability to achieve our mission.”
- ◆ “Because the Stuart Foundation has so much credibility in the education reform field, their support has meant a great deal to [our organization]. Not only has their program officer provided wise guidance, but their vote of confidence in us has attracted other funders to our work.”
- ◆ “The Foundation's support has allowed us to ask for larger grants from other noteworthy foundations.”
- ◆ “We have leveraged this support to get support from many other funders. The size and duration of the support has been a strong signal to other funders.”

# Active Help in Securing Funding from Other Sources (3) Grantee Perception Report® Excerpt

Stuart more frequently provides grantees these funding assistance activities than typical.

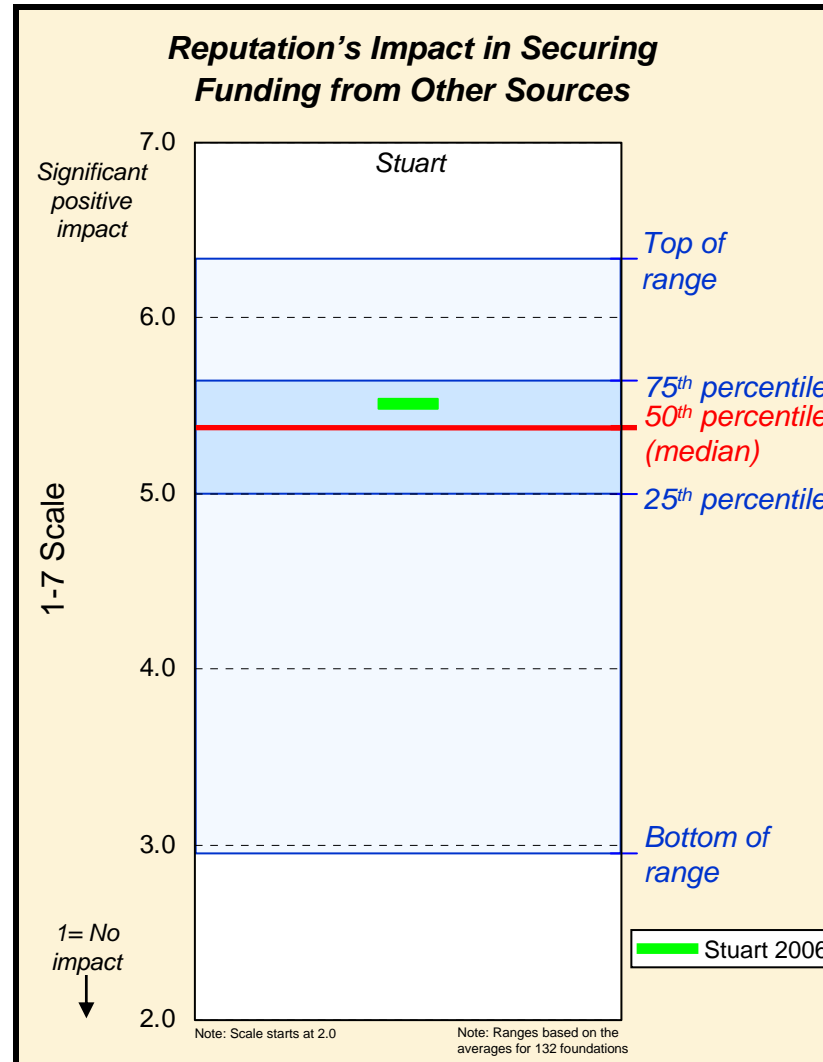
**Activities Provided by the Foundation to Assist in Obtaining Funding From Other Sources**



Note: This chart includes data about 132 foundations, with the exception of two categories: "funded development staff" includes data about 76 foundations, and "sent e-mails on your behalf" includes data about 25 foundations. Stuart 2003 data not available because of changes to the survey instrument.

# Impact of Reputation in Securing Funding from Other Sources

Stuart grantees rate the impact of the Foundation's reputation in securing funding from other sources as positively as the ratings received by the median foundation.

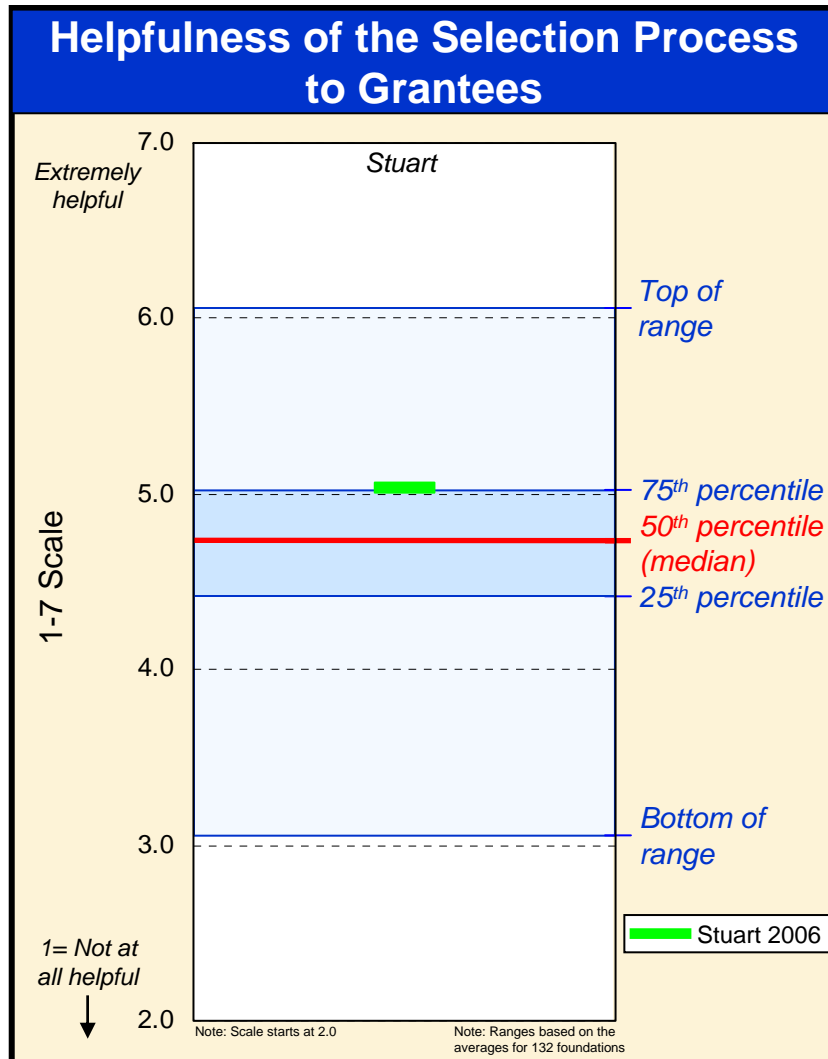


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# Helpfulness of Selection Process

Participating in the selection process at Stuart is seen to be more helpful in strengthening the grantee as the process of the median foundation.

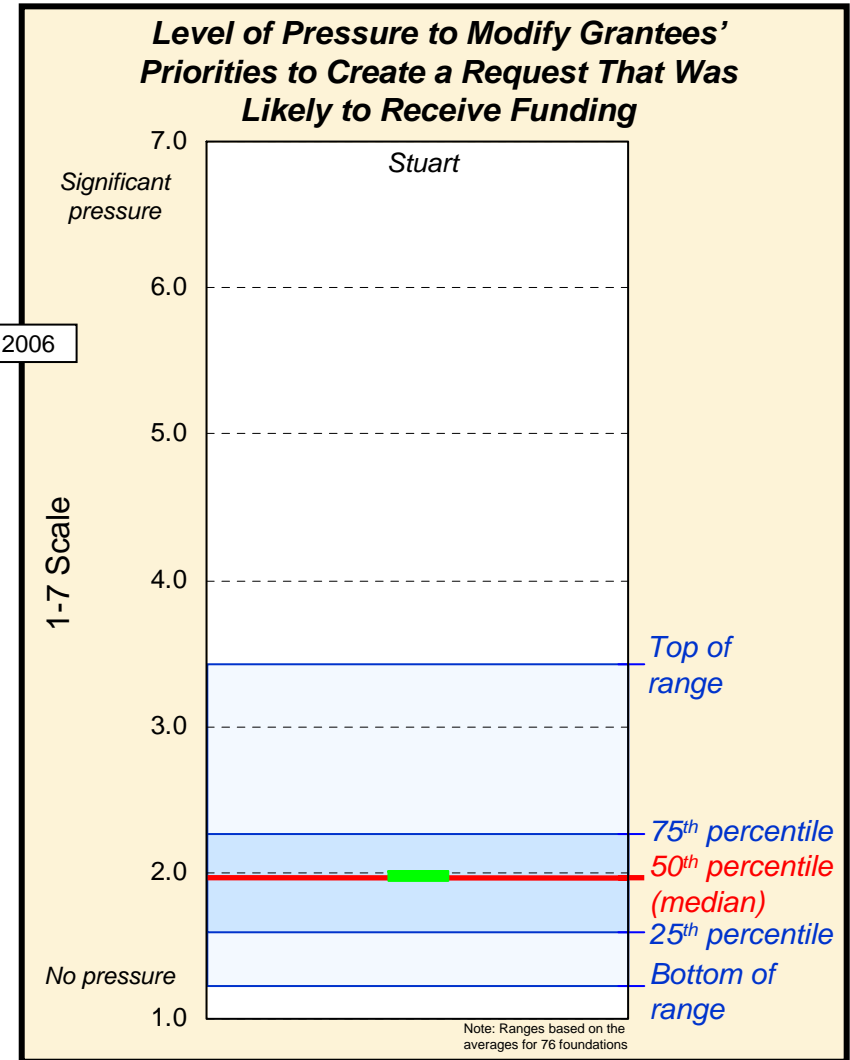
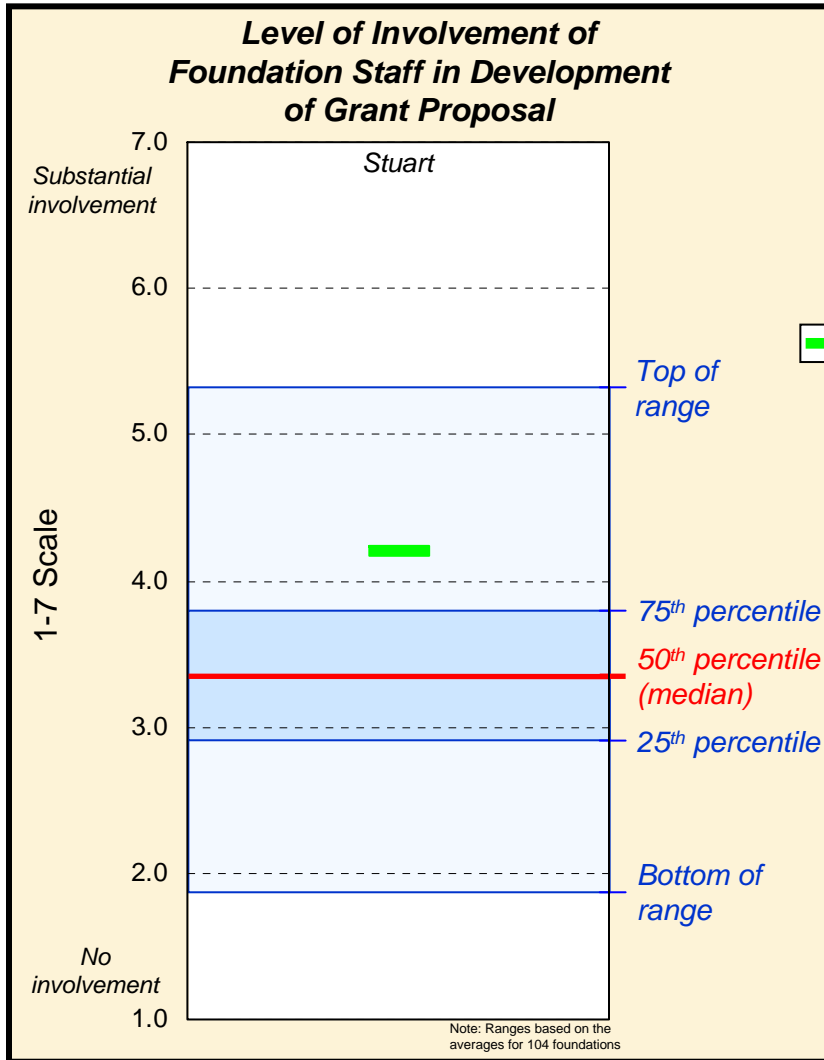


## Grantee Comments on the Selection Process

- ◆ “Stuart Foundation's granting process, particularly the hands on approach taken by the Program Officers has made our programs and proposals better in general. They have not shied away from asking the hard questions but have been helpful in finding the answers when we didn't know them. Stuart is one of the few foundations where I feel I can try different solutions to problems and work with my Program Officer to find the right one.”
- ◆ “The Foundation's flexibility in the manner and timing of its funding broke a serious logjam in our work.”
- ◆ “This foundation is one of the most professional and thorough in vetting a proposal. They answered every question and every call [and] gave appropriate assistance and guidance throughout.”

# Impact of Foundation on Proposal Development

Grantees rate Stuart staff as more involved in proposal development than the median foundation is rated by its grantees. Stuart grantees' ratings of the level of pressure they perceived to modify their priorities in order to receive funding are similar to the ratings of the median foundation.

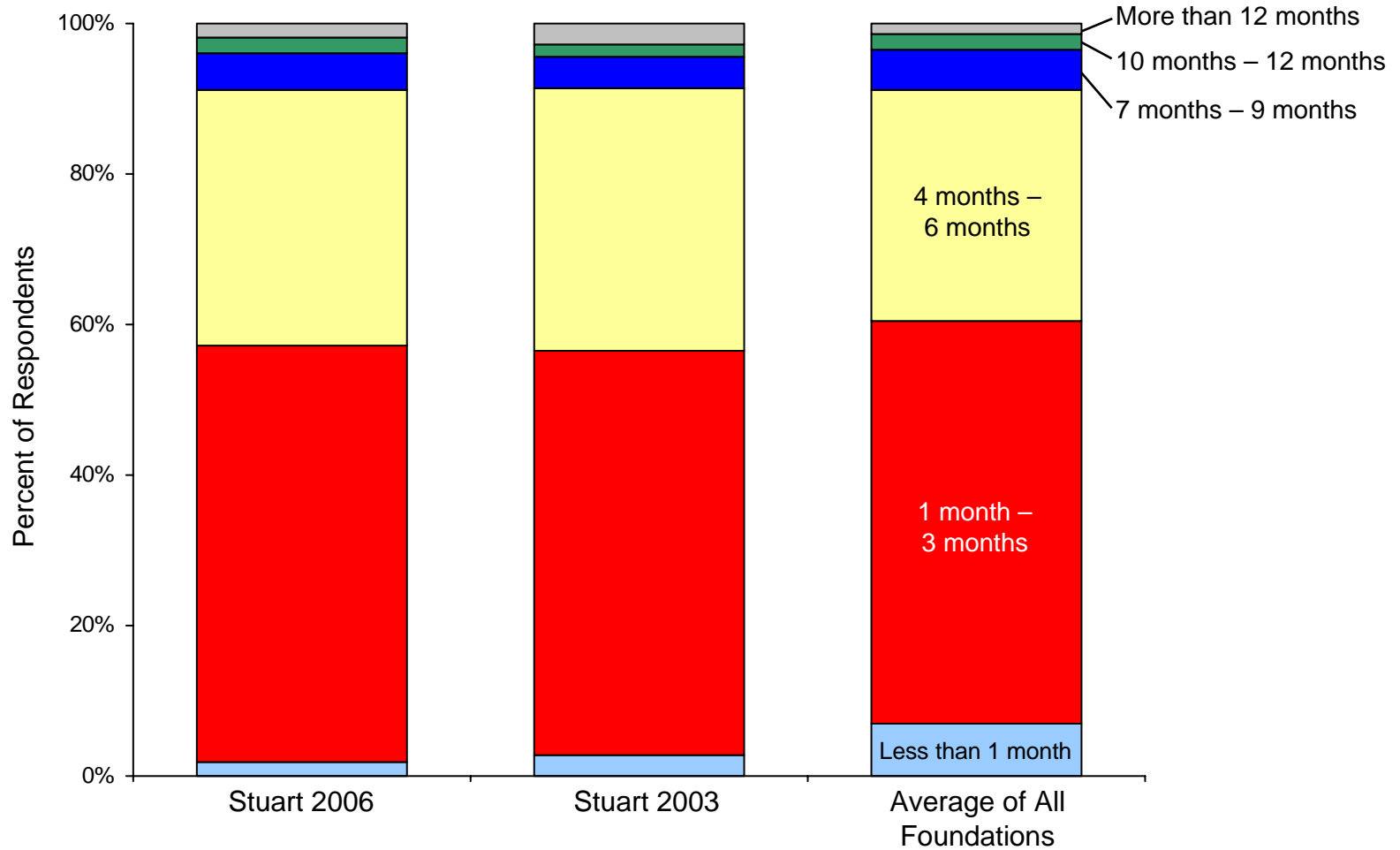


Stuart 2006

# Time Between Submission and Clear Commitment

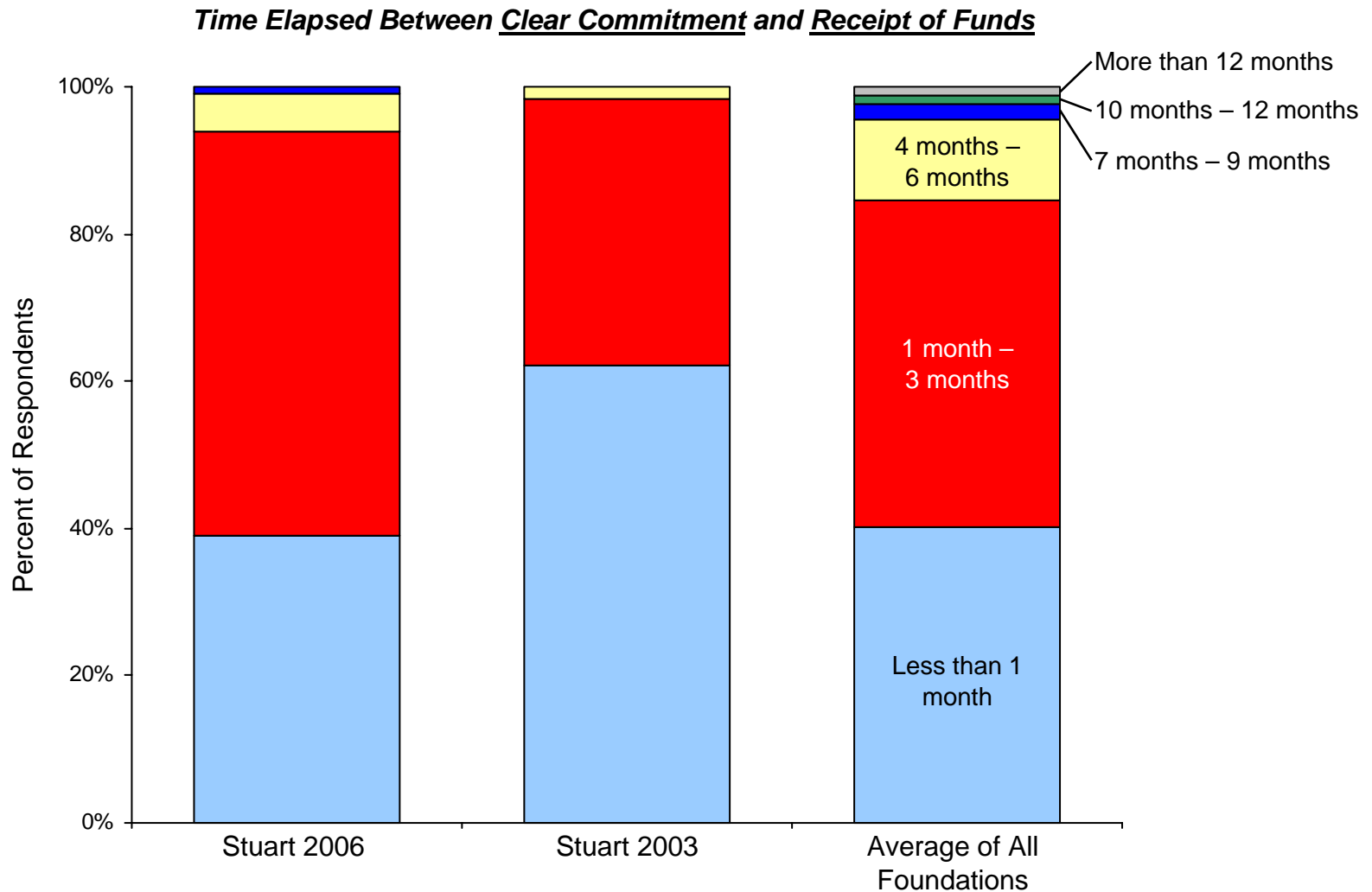
Ninety-two percent of Stuart grantees report six months or fewer elapsing between submission of proposal and clear commitment of funding from the Foundation, a typical proportion.

*Time Elapsed Between Proposal Submission and Clear Commitment*



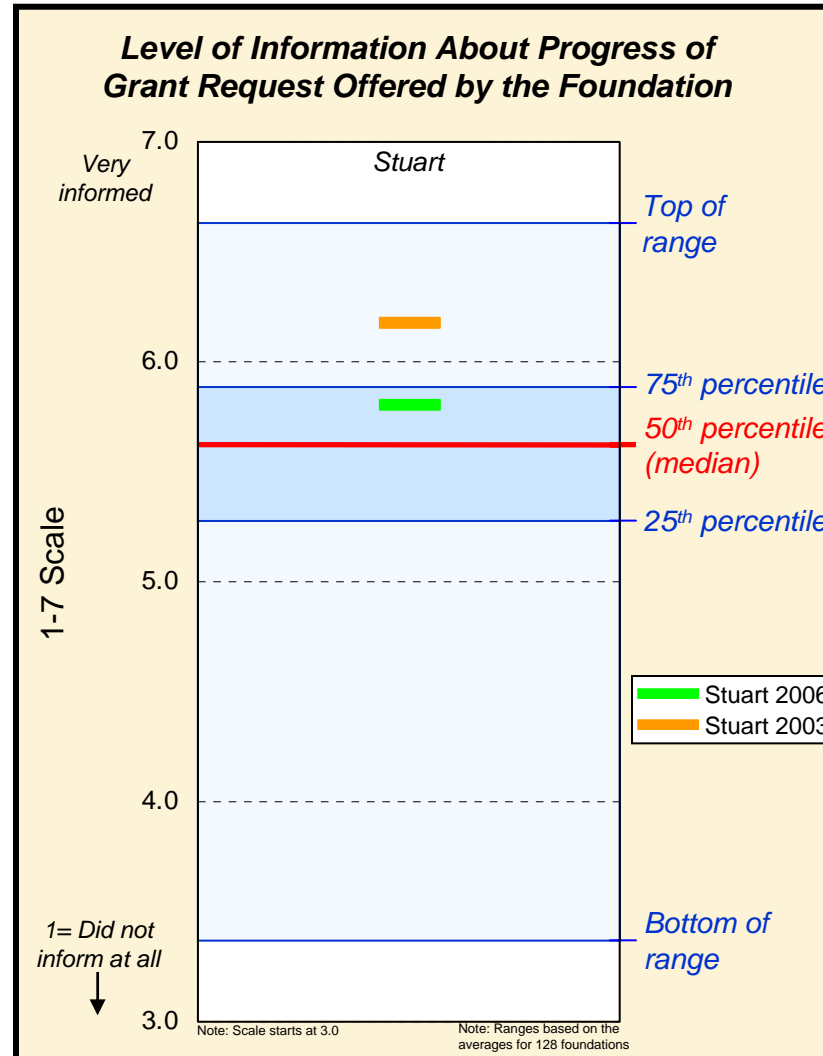
# Time Between Clear Commitment and Receipt of Funds

Ninety-nine percent of Stuart grantees report six months or fewer elapsing between clear commitment of funding and receipt of funds from the Foundation.



# Communication During Selection Process

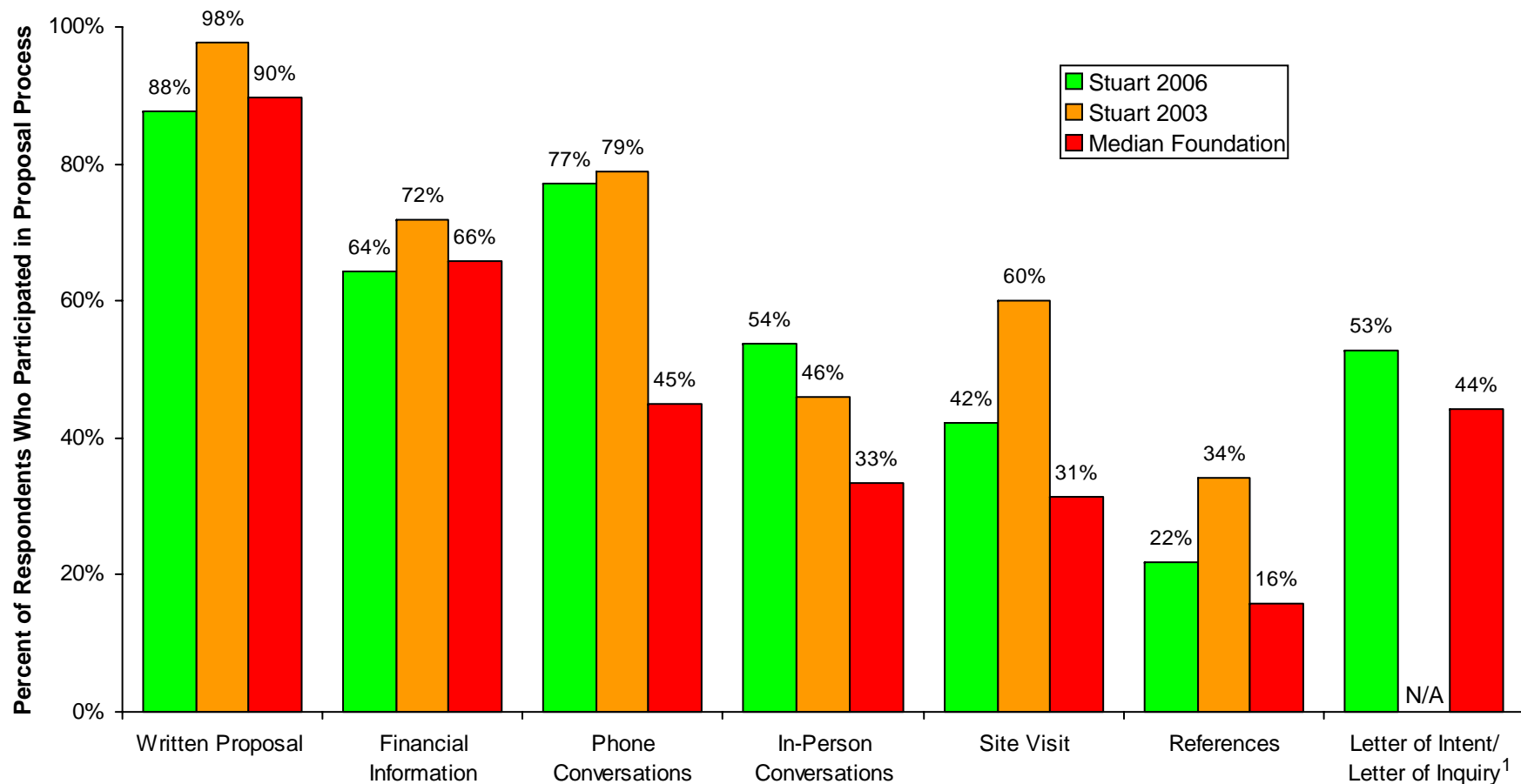
Stuart keeps its grantees more well-informed about the progress of their grant request than typical during the selection process.



# Data Requested During Selection Process

Stuart grantees more frequently report engaging in phone and in-person conversations as well as site visits with Foundation staff and providing references as part of the selection process.

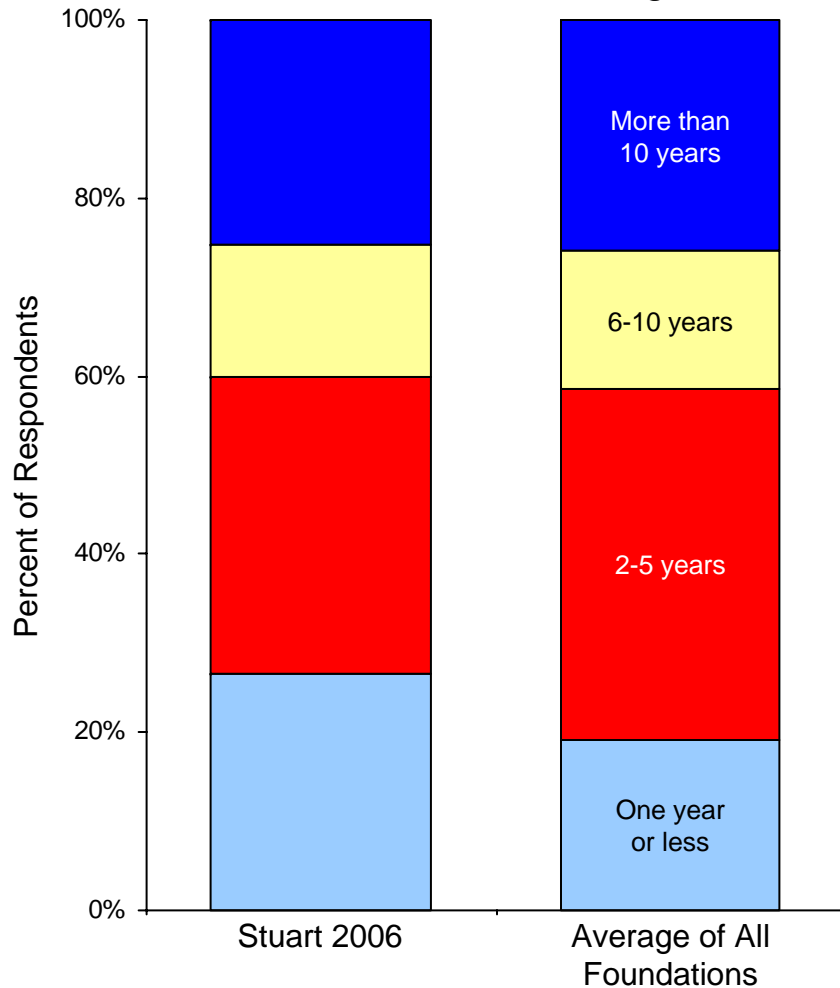
**Data Requested by the Foundation During the Selection Process**



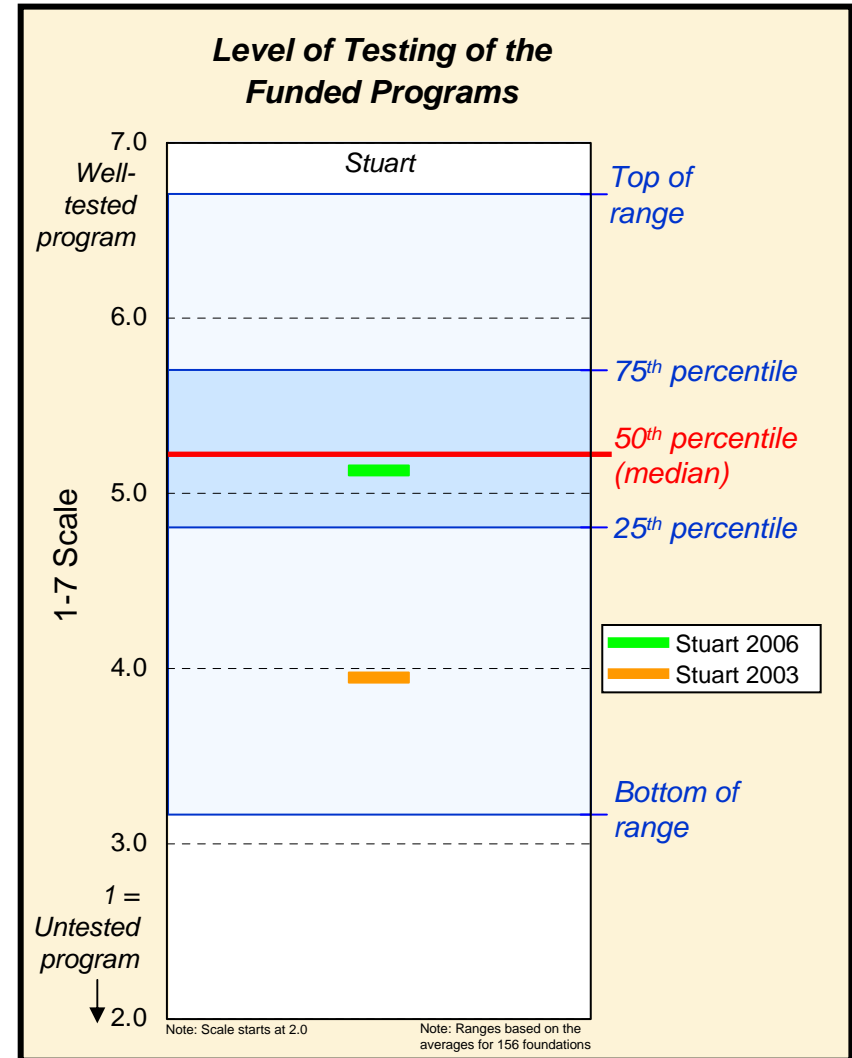
# History of Grantee Programs

Compared to other foundations, Stuart funds programs with a typical history of implementation. The programs funded are described by grantees as being as well-tested as programs funded by other foundations.

**Length of Time Which Grantees Have Regularly Conducted the Funded Programs**



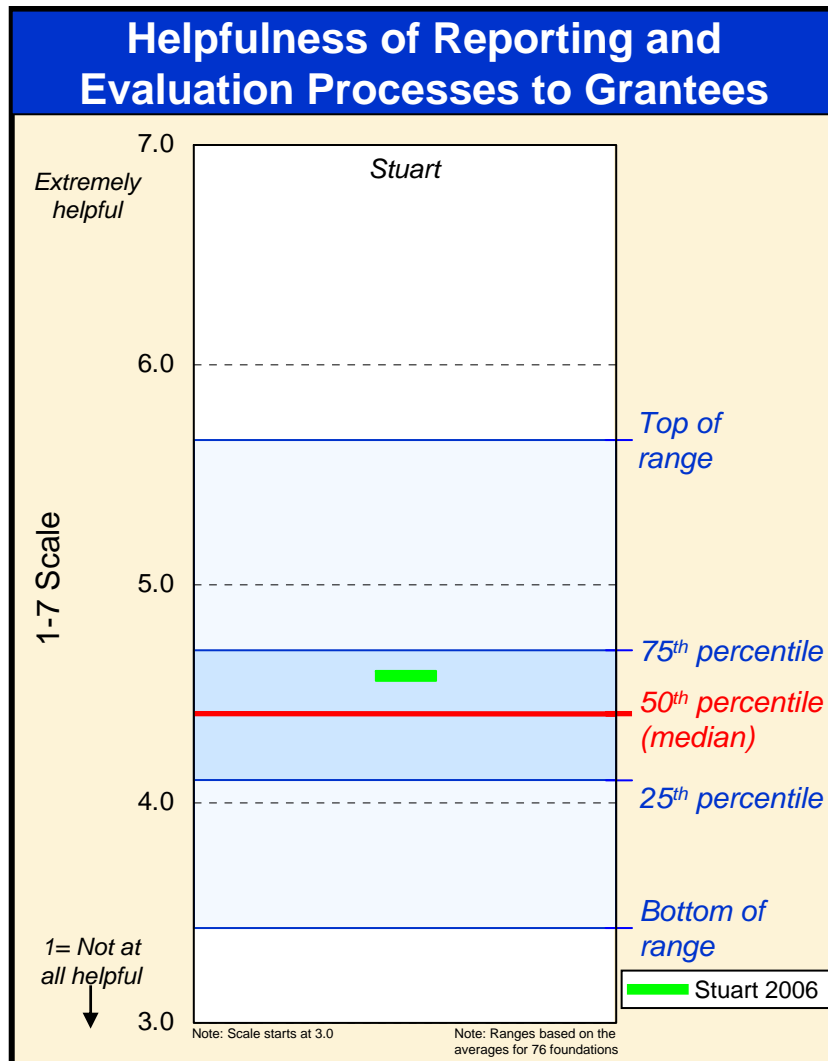
**Level of Testing of the Funded Programs**



Note: Left-hand chart includes data about 104 foundations. Stuart 2003 rating not available in left-hand charts because of changes to the survey instrument.

# Helpfulness of Reporting and Evaluation Processes

Stuart's reporting and evaluation<sup>1</sup> processes are seen to be more helpful in strengthening grantees than the processes of the median foundation.



## Grantee Comments on Reporting and Evaluation Processes

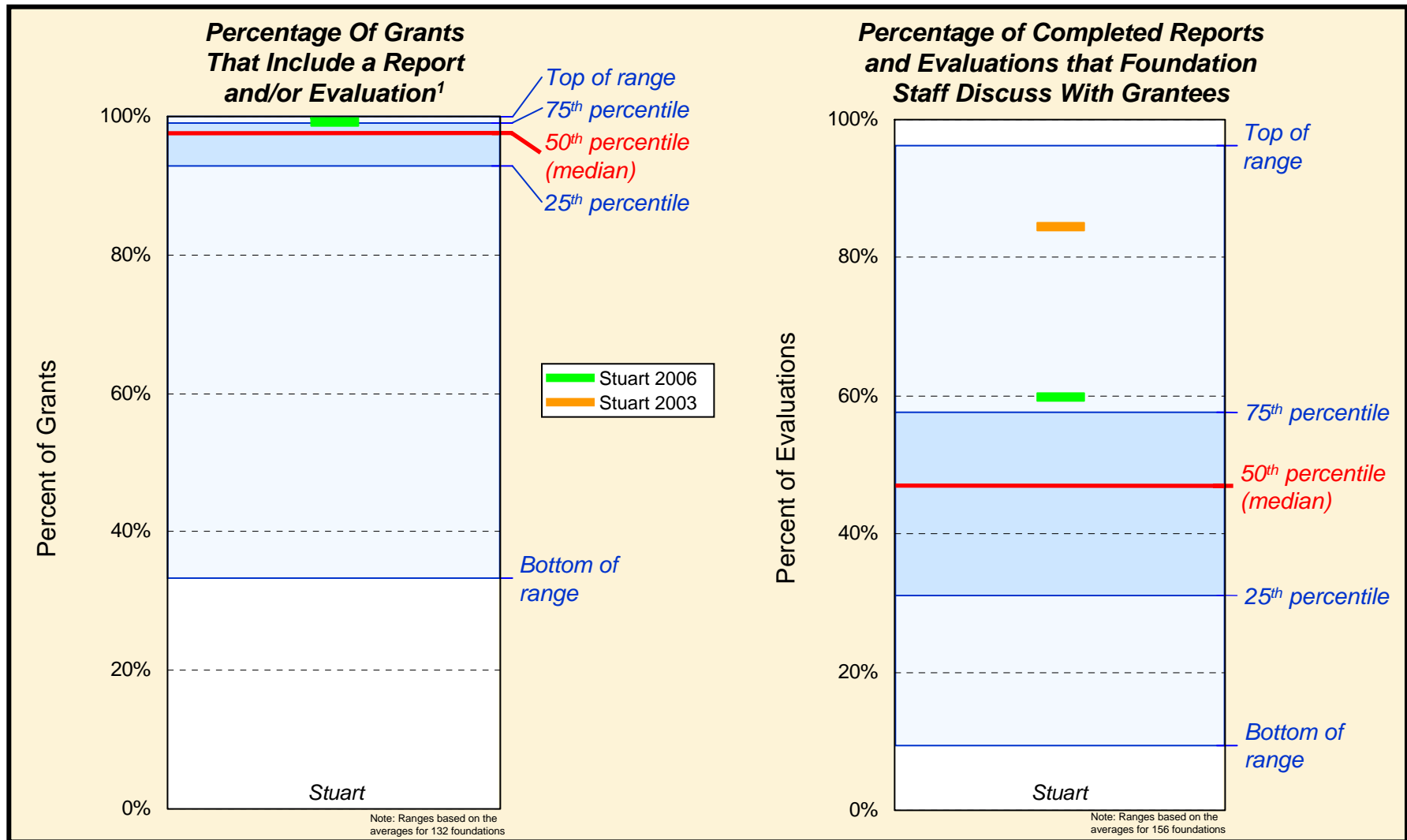
- ♦ "The Stuart Foundation staff has been a joy to deal with in this process. We felt informed and keep up to date on a grant status and pending deadlines for reports!"
- ♦ "Foundation staff do an excellent job of maintaining communication with our organization, and require quite reasonable formats for financial and narrative reporting."

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

Note: Stuart 2003 rating not available because of changes to the survey instrument.

# Reporting and Evaluation Processes

Ninety-four percent of Stuart grantees report that their grant includes a report/evaluation. Of those grantees, 57 percent report discussing completed reports/evaluations with Foundation staff.



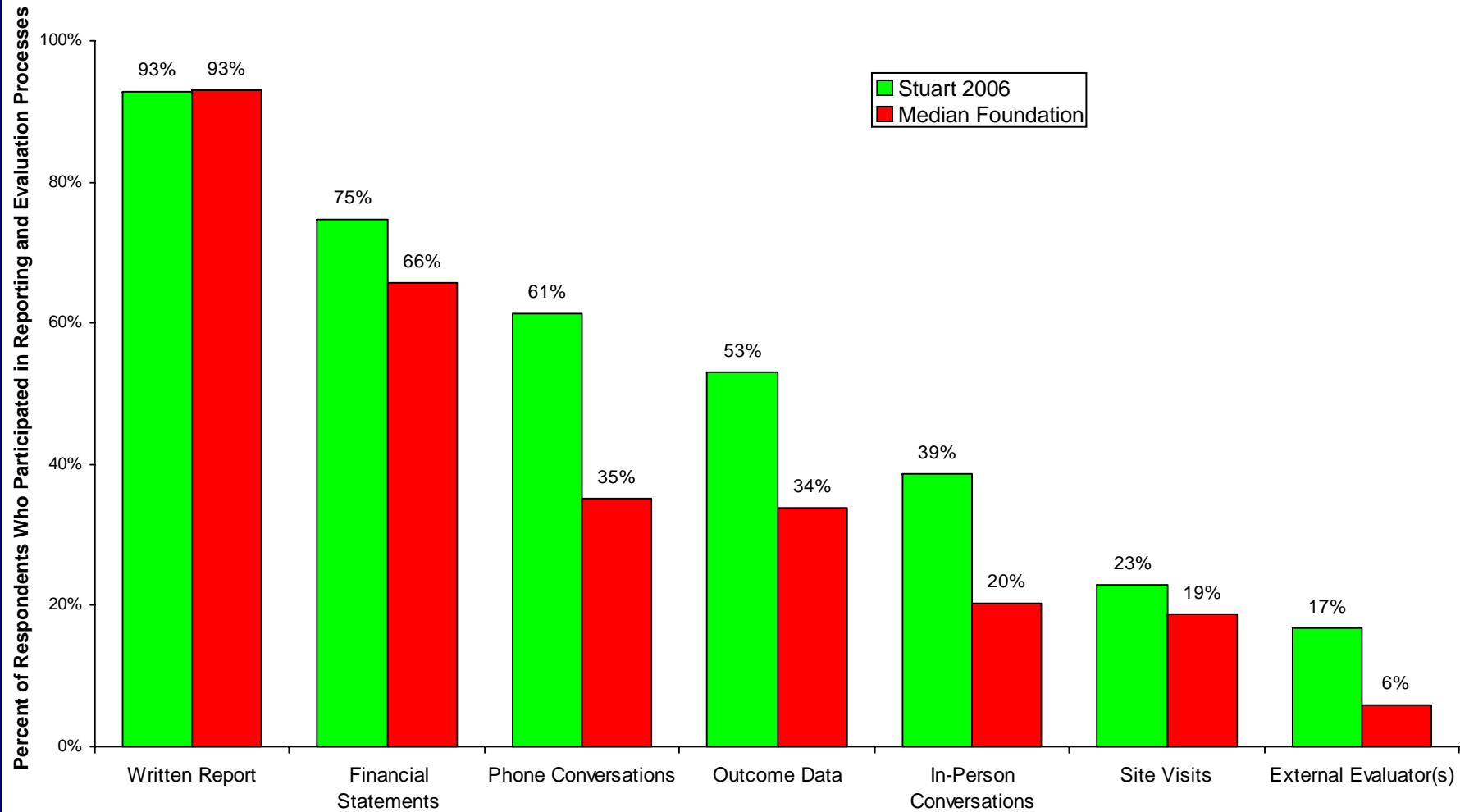
1: "Evaluation" in the survey includes any activity considered by grantees to be part of an evaluation, and does not necessarily correspond to foundation definition.

Note: Stuart 2003 rating not available because of changes to the survey instrument.

# Data Requested During the Reporting and Evaluation Processes

Stuart grantees more frequently report submitting or engaging in all of these reporting/evaluation activities, except submitting written reports, than typical.

*Data Requested by the Foundation During the Reporting and Evaluation Processes*



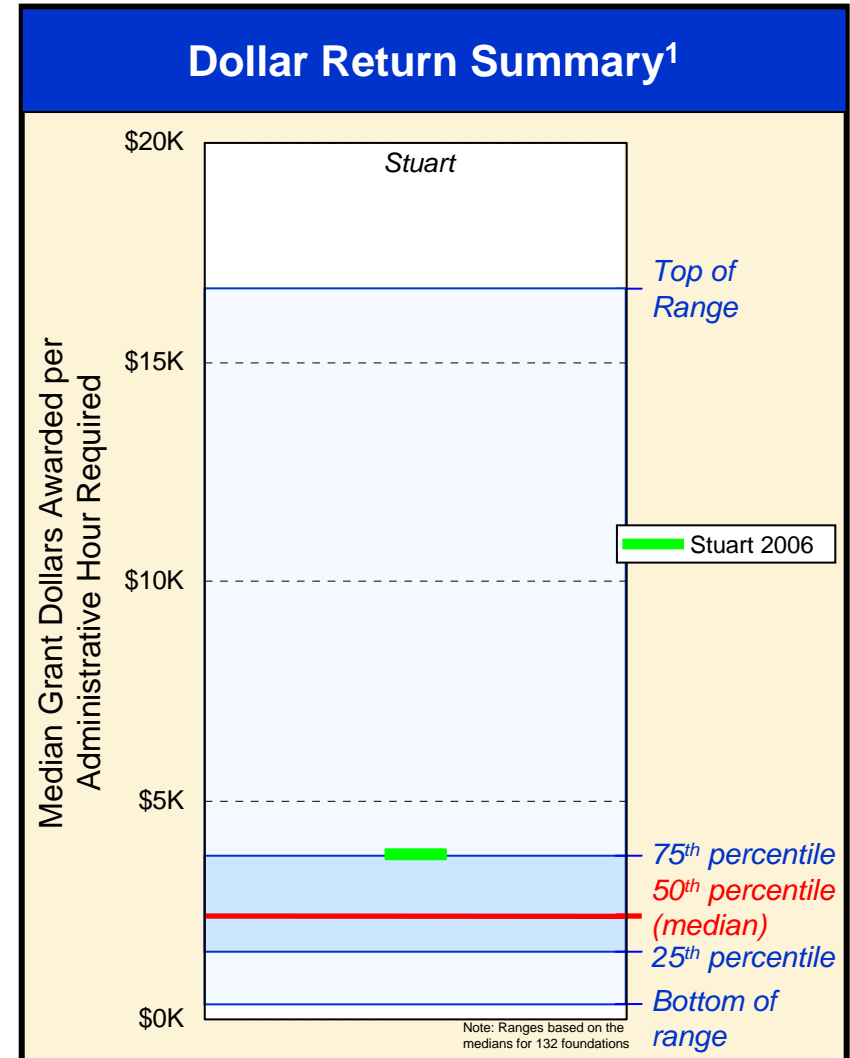
# Dollar Return on Grantee Administrative Hours

The Dollar Return Summary describes grant dollars awarded to grantees in comparison to administrative requirements on grantee.

- ◆ *Stuart awards a greater than typical number of dollars per administrative hour required of grantees.*

This composite measure includes:

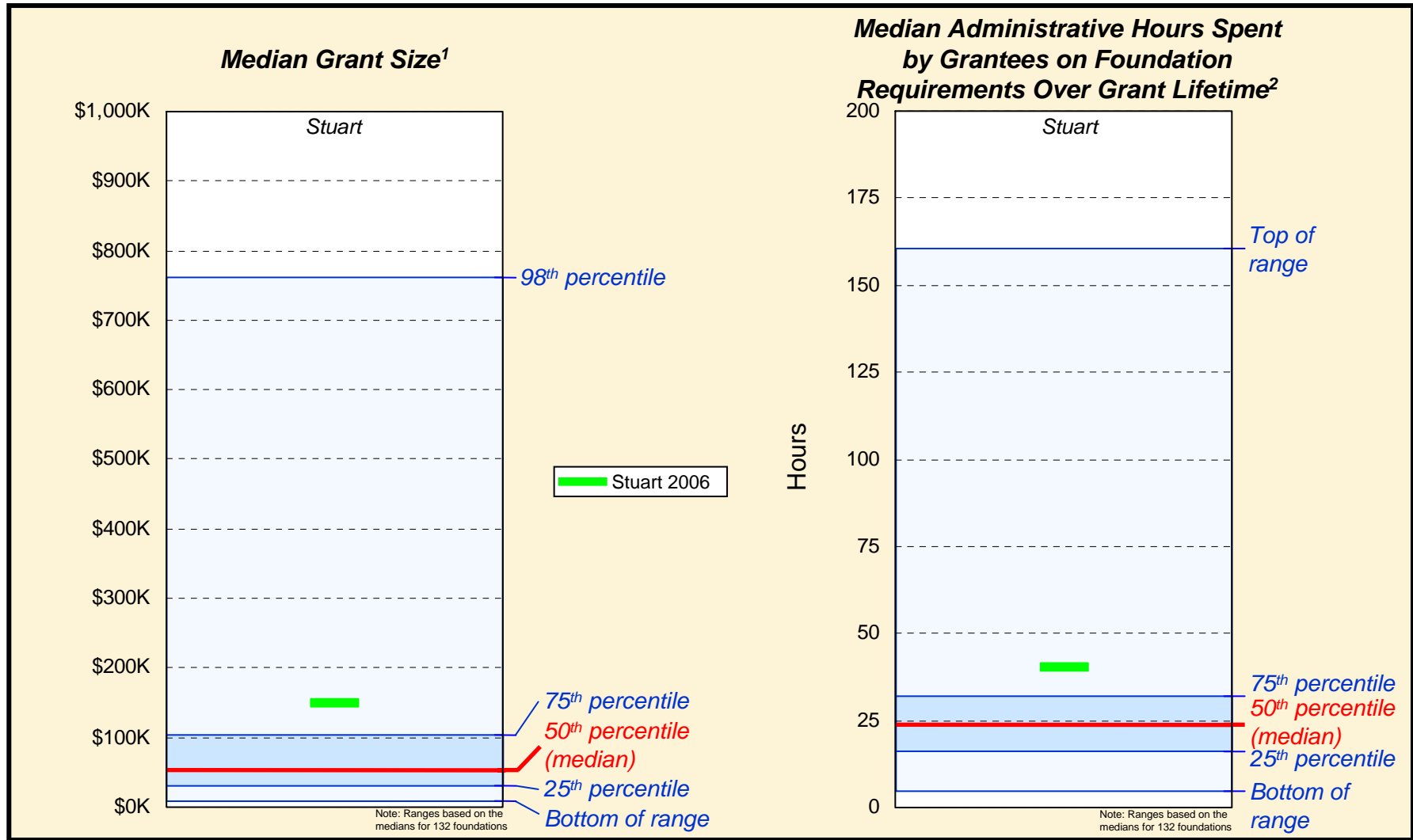
- *The total grant dollars awarded*
- *The total time necessary to fulfill the administrative requirements over the lifetime of the grant.*



1: Dollar Return on Grantee Administrative Hours is calculated for each grantee and aggregated by foundation for the Dollar Return Summary.

# Grant Size and Administrative Time Required

Stuart awards larger grants (at the median) than the median foundation. The Foundation's grants require more administrative time of grantees than the typical grant awarded by other foundations.



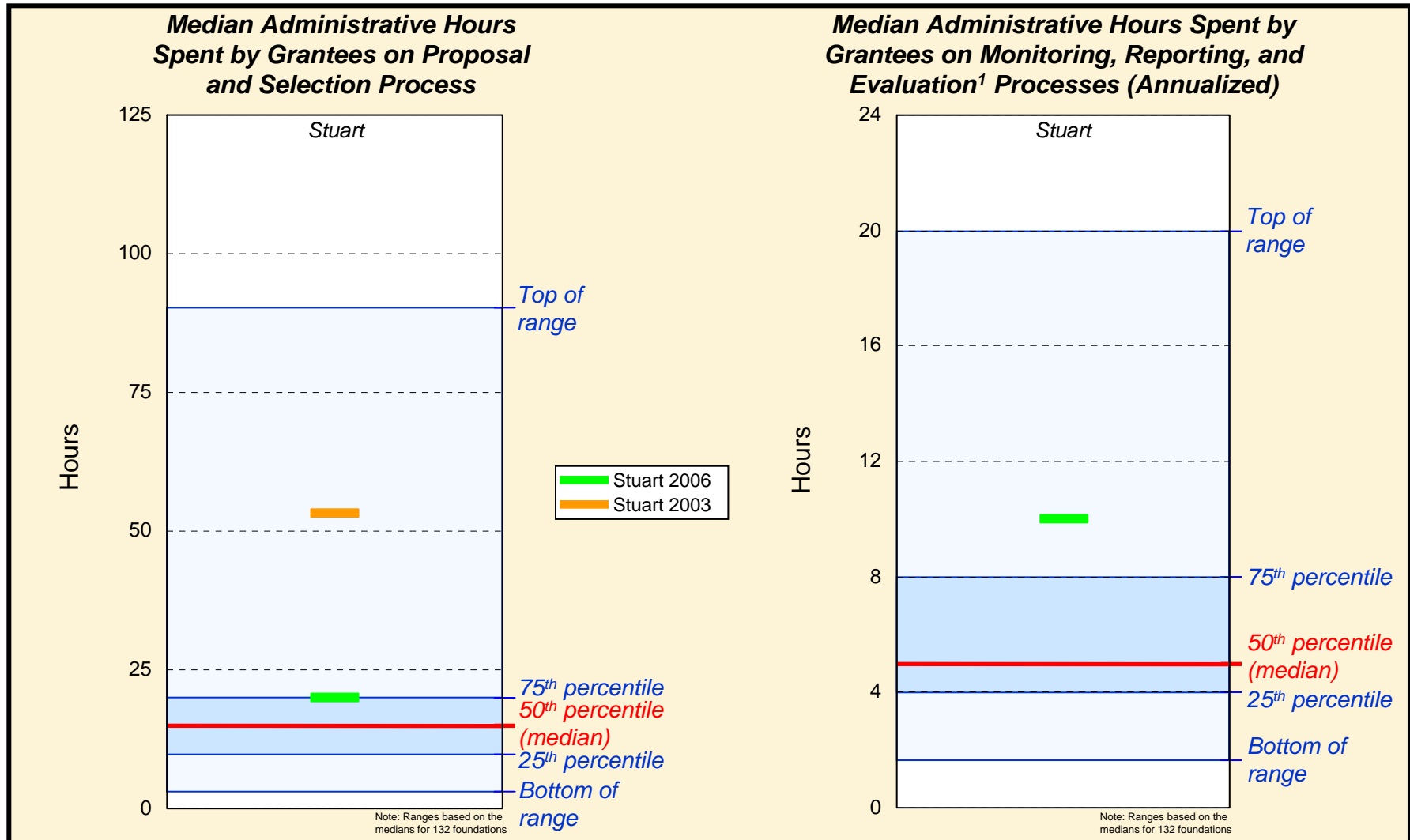
1: Chart does not include data from one foundation whose median grant size exceeds \$1,000K.

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.

Note: Stuart 2003 rating not available because of changes to the survey instrument.

# Administrative Time

The application process requires more time from Stuart grantees relative to what is required of grantees of the median foundation. Annual foundation-related monitoring, reporting, and evaluation of the grant also are more time-intensive.



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

Note: Stuart 2003 rating not available because of changes to the survey instrument, although in 2003 grantees (excluding Board Init.) reported spending 53 hours at the median on the proposal and selection process.

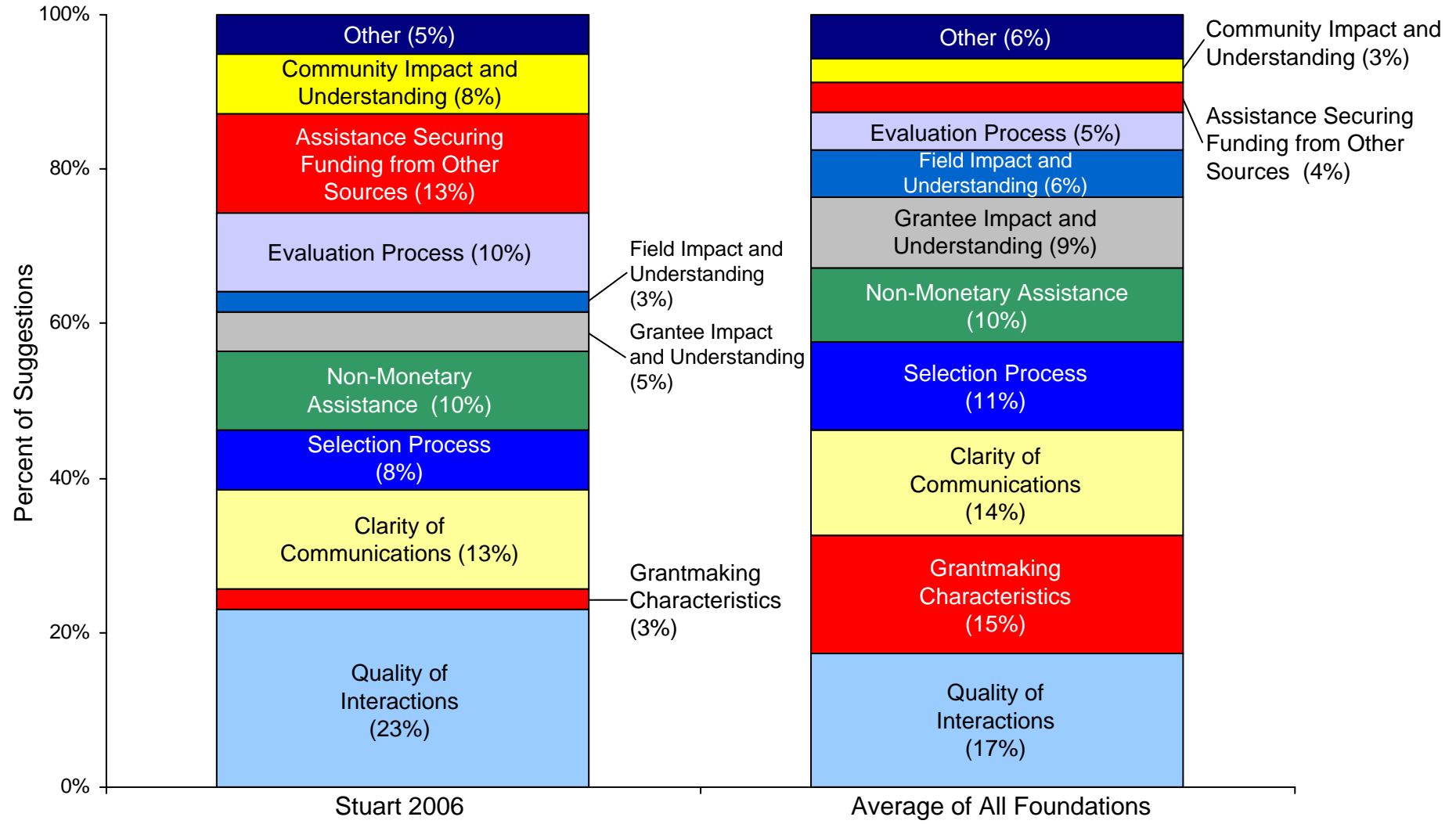
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# Grantee Suggestions for the Foundation (1)

Grantees were asked to provide any suggestions for how the Foundation could improve. A greater than typical proportion of Stuart's suggestions concern the quality of the Foundation's interactions with grantees and assistance in securing funding from other sources.

**Topics of Grantee Suggestions**



## Grantee Suggestions for the Foundation (2)

The chart below shows the areas in which Stuart’s grantees made suggestions for the Foundation’s improvement.

Topic of Grantee Suggestion	% of Stuart Grantee Suggestions	% Average Foundation Suggestions	Stuart Grantee Suggestions
Quality of Interactions	<b>23%</b>	17%	“Be more consistently responsive with grantees whose grants are ending and who are hoping for a renewal, either tell them up front there will not be a renewal opportunity or communicate a time line of action to expect.” “The turnover was high. I never knew who to contact because jobs kept changing.” “Hire consistently high-quality staff.” “Having consistent staff will allow the Foundation to continue the outstanding interactions and support we have experienced in the past year.” “More contact with program staff to work with us and collaborate on our processes for continuous improvement.” “Get more involved.” “The Foundation might consider regional program officers for the State of California.” “More time with Stuart Foundation staff now that you are back to having two education program officers.” “Return phone calls and emails.”
Clarity of Communications	<b>13%</b>	14%	“The Stuart Foundation has had a tremendous impact on the child welfare system over the past years. Pulling out of this area leaves a huge hole that is unlikely to be filled. At the very least, the foundation should provide a public explanation for it’s decision and be a lot clearer on what areas it now intends to fund.” “Be very specific on your website so that organizations know exactly who qualifies for funding, and what areas of California are eligible for funding – include exclusions.” “It would be helpful to provide a better understanding of how and how often the Foundation would like its funded organizations to communicate with them.” “More clarity from the Foundation as to what they prioritize in programming going forward.”
Assistance Securing Funding from Other Sources	<b>13%</b>	4%	“Assistance in identifying other funding resources.” “Anticipate the end of the funding relationship and suggest alternate funders.” “More active referrals to other like-minded foundations/corporations.” “More links to like foundations to further program funding opportunities.”
Non-Monetary Assistance	<b>10%</b>	10%	“Perhaps provide support for ‘marketing’ the materials and strategies developed by projects.” “I would appreciate more interactions with grantees and more opportunities to collaborate on issues.” “I would love to get further non-monetary support from Stuart if possible.”

## Grantee Suggestions for the Foundation (3)

The chart below shows the areas in which Stuart’s grantees made suggestions for the Foundation’s improvement.

Topic of Grantee Suggestion	% of Stuart Grantee Suggestions	% Average Foundation Suggestions	Stuart Grantee Suggestions
Evaluation Process	10%	5%	“The evaluation part of our grant ... was invaluable. I would like to see that aspect emphasized ... Thoughtful assessments and reports helped guide what we did throughout the year.” “Continue to look at streamlining reporting requirements.” “More engagement on reports.”
Selection Process	8%	11%	“It would have been helpful if we had learned of the funding decisions sooner.” “Fulfill written agreements to review proposals as communicated to client.” “The great frustration for us was the amount of staff time and attention needed for the proposal development.”
Community Impact and Understanding	8%	3%	“I still believe a more active presence in Washington State would be good for Washington State and a better grasp of the education side of youth/community work would be good – rather than splitting that.” “A better understanding of our region and mission.” “Provide more funding to San Francisco, particularly in the impoverished community which has been neglected for years.”
Grantee Impact and Understanding	5%	9%	“As a new fundee, I might have benefited from more mentorship from the Foundation.” “Become familiar with the entire organization, not just the funded program.”
Field Impact and Understanding	3%	6%	“I am troubled by what seems to be a different direction in the public schools program.”
Grantmaking Characteristics	3%	15%	“To provide larger grants rather than matching grants or funds for pilots.”
Other	5%	6%	“Foundation staff is responsive and thoughtful. But like many foundation staff, there is always a sense of ‘too much to do.’ Perhaps it would be helpful to have fewer grants with more resources.” “Mentor staff from other foundations (to the extent possible) by sharing what they know about grantmaking for successful outcomes, public policy, and public education.”

Total number of Stuart Grantee Suggestions

39

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# Review of Findings

Chart shows Stuart's 2006 (◆) and 2003 (◇) percentile ranks among all foundations in comparative set.

Indicator	Percentile					Description
	0th	25th	50th	75th	100th	
Impact on the Field						Grantees were asked to rate the foundation's impact on their fields.
Impact on the Community						Grantees were asked to rate the foundation's impact on their local communities.
Impact on the Grantee Organization						Grantees were asked to rate the foundation's impact on their organizations.
Satisfaction						Grantees were asked to rate their overall satisfaction with their funder.
Interactions						This summary includes grantee ratings of foundation fairness, responsiveness, and grantee comfort approaching the foundation if a problem arises.
Clarity of Communications of Goals and Strategy						Grantees were asked to rate the clarity of the foundation's communication of its goals and strategy.
Non-Monetary Assistance <sup>1</sup>						This summary includes the frequency of provision and ratings of helpfulness of 14 individual activities, including management and field-related assistance.
Assistance Securing Funding from Other Sources <sup>1</sup>						This summary includes the frequency of provision of foundation assistance in obtaining funding from other sources, and ratings of the impact of those efforts.
Selection Process <sup>1</sup>						Grantees were asked to rate the helpfulness of the foundation's selection process for their organizations.
Reporting and Evaluation Processes <sup>1</sup>						Grantees were asked to rate the helpfulness of the foundation's reporting and evaluation processes for their organizations.
Dollar Return on Grantee Administrative Hours <sup>1</sup>						This summary is calculated by dividing the dollar value of individual grants by the time required of grantees to fulfill the foundation's administrative requirements.

# Areas for Discussion (1)

- ♦ **On many measures, Stuart's ratings in 2006 are either similar to or have improved relative to Stuart's ratings in 2003**
  - Most grantee ratings of Stuart have changed little between a survey of Stuart's grantees that was conducted in 2003 and this survey conducted in 2006. Similar to the findings in 2003, grantees ratings of the Foundation are above typical for its impact on grantees' organizations, understanding of grantees' fields, and ability to advance knowledge and effect public policy in those fields.
  - Grantee ratings for the Foundation impact on and understanding of their local communities are also similar to ratings received in 2003, and are below the ratings of the median foundation.
  - However, in 2006, grantees rated the Foundation more positively on the important measures of Stuart's impact on grantees' fields and its understanding of grantees' goals and strategies.
  - On most major measures, the Foundation is rated close to or above the median of all foundations.
  
- ♦ **Quality of Interactions and Satisfaction**
  - Stuart is rated near or above the median foundation for the quality of interactions with Foundation staff. Grantee ratings of the quality of their interactions with Foundation staff are the best predictor of grantee satisfaction. A slightly larger than typical proportion of Stuart grantees reported being less satisfied with the Foundation than they were last year.
  - In some areas, interactions have decreased: The Foundation conducts site visits to a smaller proportion of grantees as part of the selection process than it did in 2003, and Stuart discusses completed evaluations with grantees less frequently than in 2003. Stuart also has a higher proportion of grantees in 2006 that report interacting with Foundation staff yearly or less frequently than in 2003 (7% in 2003 vs. 13% in 2006). These grantees rate the Foundation less positively across a number of important dimensions including quality of interactions.
  - In analyzing the responses of grantees that reported receiving their most recent grant in 2004 compared to those that received their most recent grant in 2005, there are several significant differences<sup>1</sup> in ratings. Importantly, grantees that received their grant in 2004 rate the Foundation less positively for their comfort in approaching the Foundation if a problem arises, the responsiveness of Foundation staff, and their overall satisfaction.
  - Comments about Stuart's quality of interactions with grantees represents the largest proportion of grantee suggestions for the Foundation's improvement.
    - *While currently, there are only small changes in quality of interactions ratings between 2003 and 2006, Stuart is trending towards less frequent interactions in areas that typically, eventually, affect quality ratings. Should the Foundation monitor this area of grantee ratings around the quality of interactions and frequency of helpful contact with the Foundation?*
    - *Should the Foundation consider ways in which grantees' experiences with the Foundation may change during the course of their grant to maintain the high level of interactions reported by more recently funded grantees?*

## Areas for Discussion (2)

### ◆ Helpfulness of Reporting/Evaluation Process

- The helpfulness of Stuart's reporting/evaluation process is rated above the median. While grantee ratings on this measure are not completely comparable between 2003 and 2006, in 2003 Stuart's evaluation process was the highest rated among the foundations surveyed in that round.
- Although nearly all of Stuart's grantees report participating in an evaluation, 57 percent report discussing their completed evaluation with Foundation staff. While this is an above typical proportion, it is a significant<sup>1</sup> decrease from 2003, when 84 percent of respondents reported discussing their completed evaluation with Foundation staff.
- While grantee ratings on this measure are not completely comparable between 2003 and 2006, in 2003 the Foundation was rated much closer to the top of the range for the helpfulness of the reporting/evaluation process.
- Grantees that discussed completed reports and evaluations with Foundation staff rate the helpfulness of the evaluation process significantly higher than those that did not (5.4 versus 3.7, on average).<sup>1</sup>
  - *Should Stuart return to more frequent discussions of completed reports and evaluations with grantees?*

### ◆ Non-Monetary Assistance

- Stuart provides more than 60% of its grantees with non-monetary assistance – a larger than typical proportion. The assistance provided tends to be rated more positively than the assistance provided by the median foundation.
- Grantees that received non-monetary assistance rate the Foundation significantly more positively than those that did not on a variety of measures including measures of impact, understanding, overall satisfaction, clarity of communications, and quality of interactions.
- Grantees often comment on the expertise of Stuart staff in their fields and the convening power of the Foundation.
  - *Should the Foundation provide non-monetary assistance to an even larger proportion of its grantees?*
  - *The Foundation may want to consider the qualities of its non-monetary assistance – or the process of providing that assistance – that lead grantees to provide more positive ratings across almost all significant measures of foundation impact and effectiveness.*

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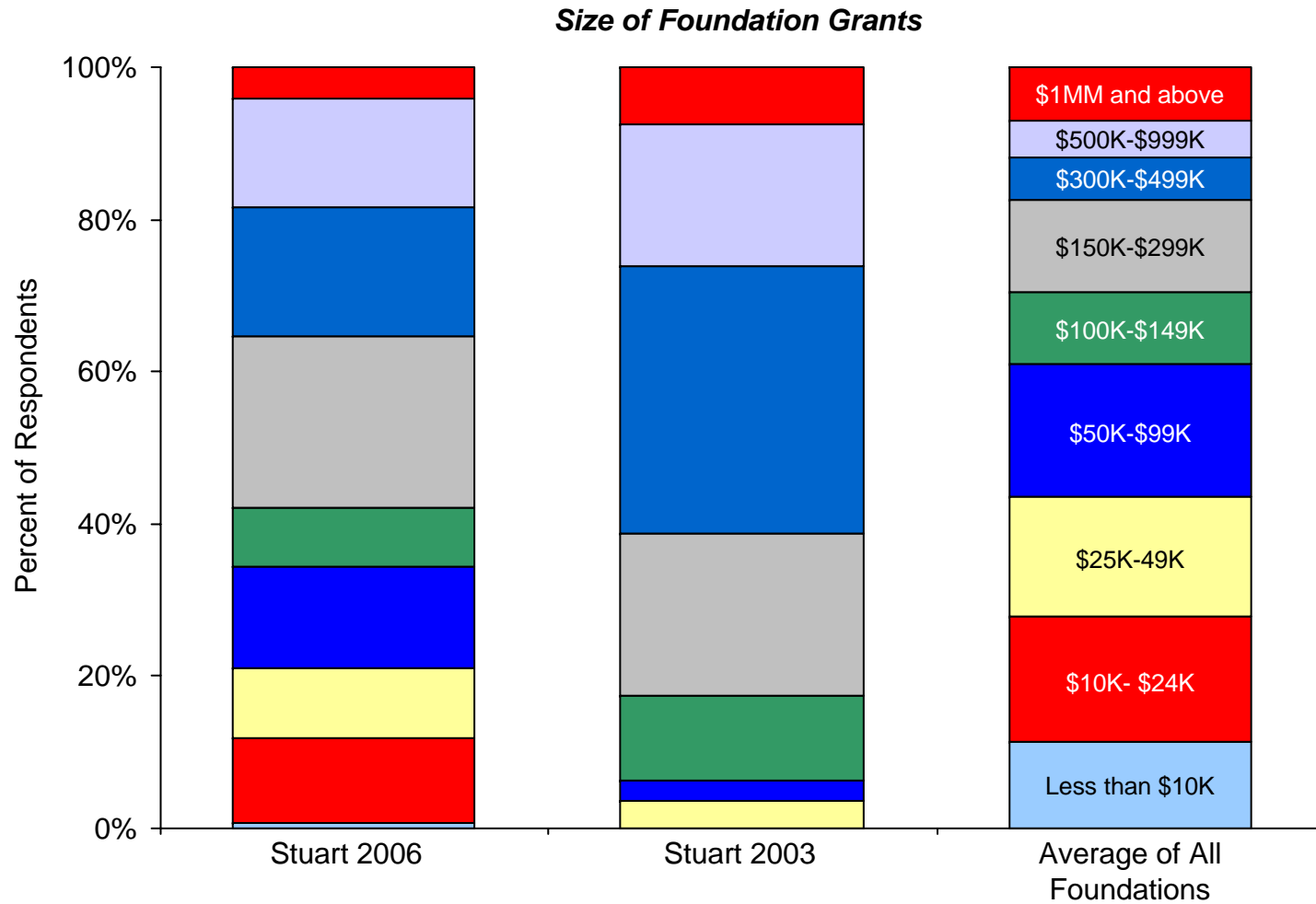
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# Size of Foundation Grants

Stuart grantees receive grants that are larger at the median compared to other grantees in the sample.



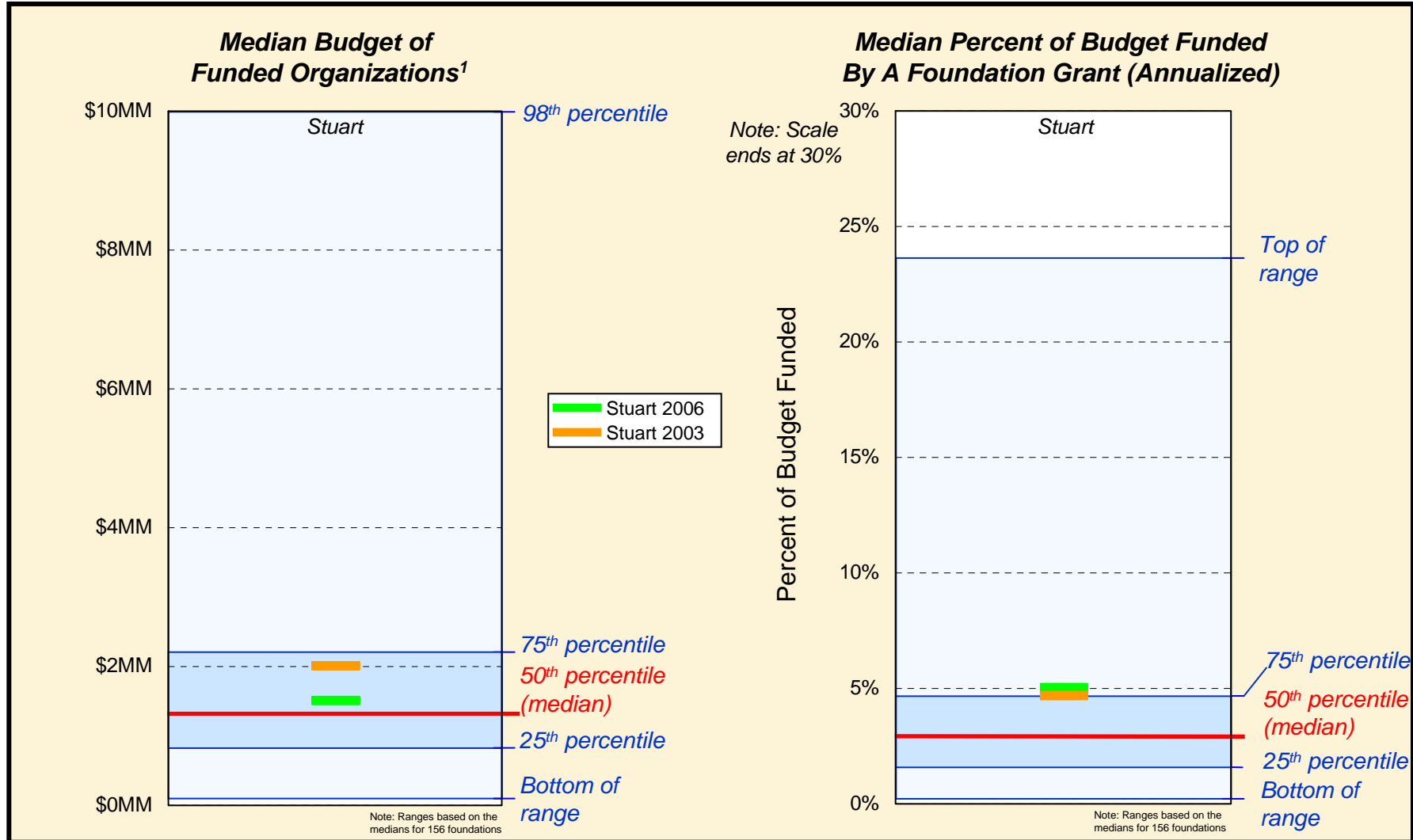
**Population Average** \$1.5MM  
**Population Median** \$150K

\$553K  
\$333K

\$572K  
\$50K

# Size of Organizations Funded Relative to Grant

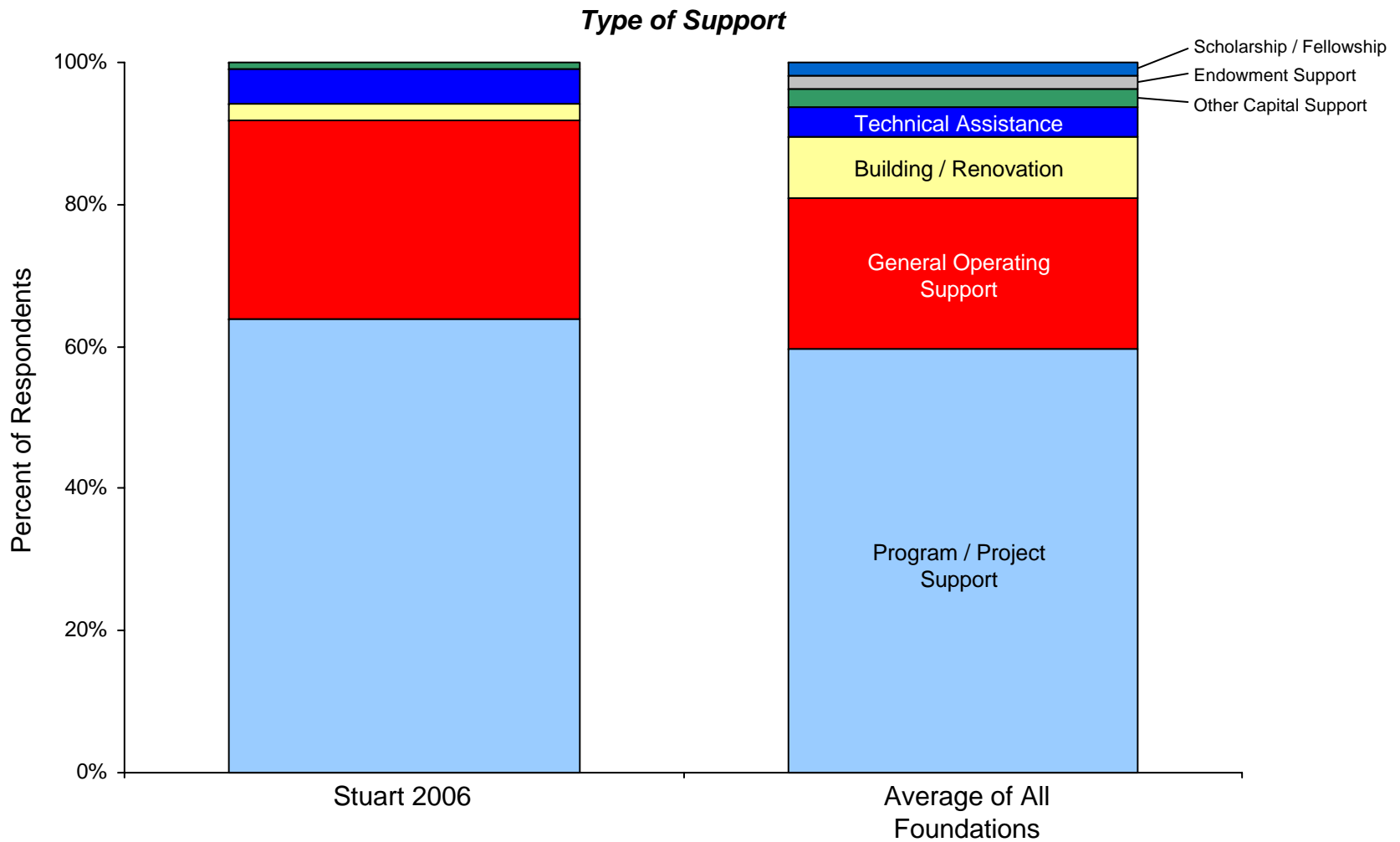
Stuart funds organizations with typical budgets compared to other foundations in the comparative set. Stuart funding represents a larger percentage of grantees' budgets than does funding of the median foundation.



1: Chart range does not include three individual foundation medians of more than \$10MM.

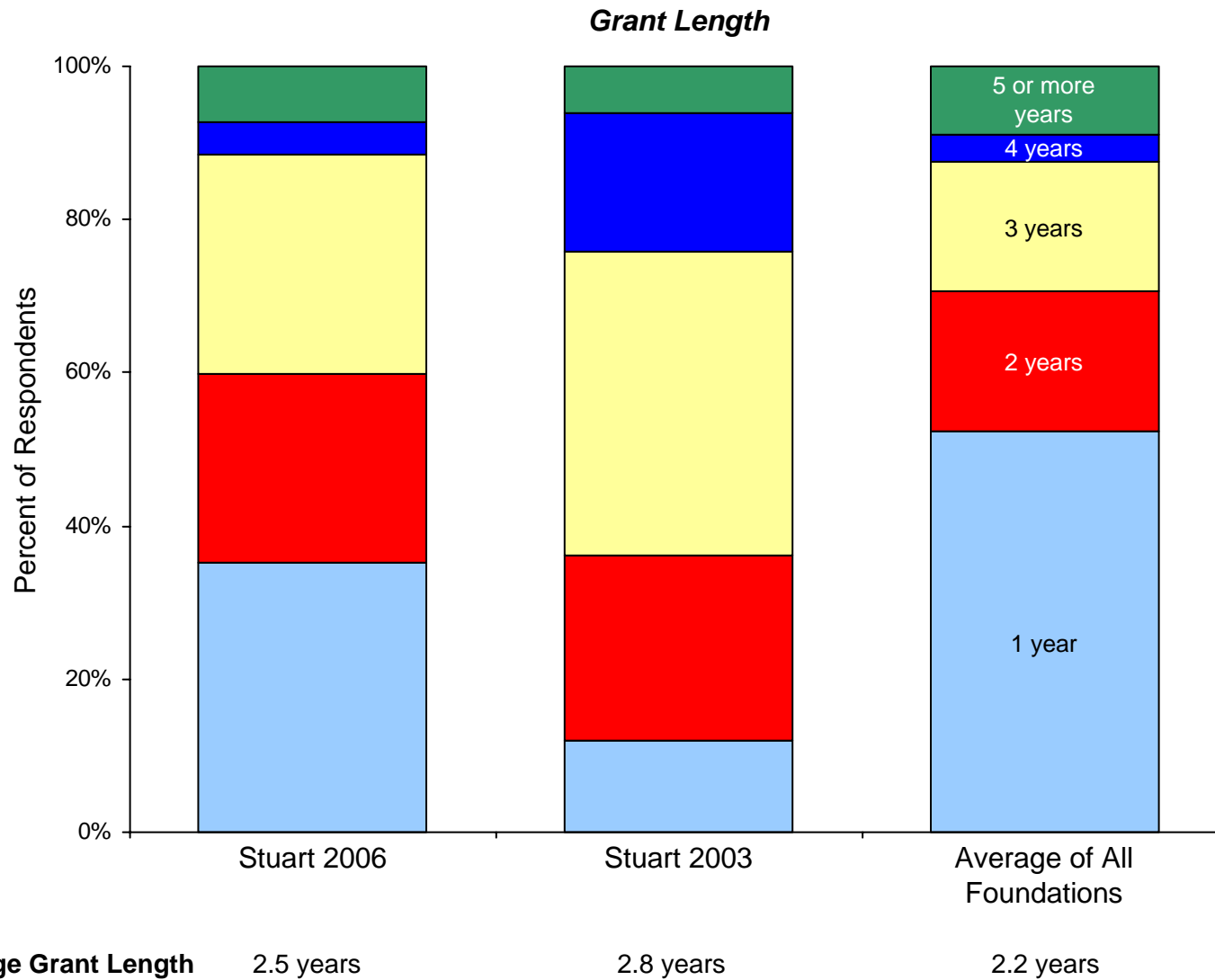
# Type of Support

Stuart awards a larger proportion of general operating support grants than typical.



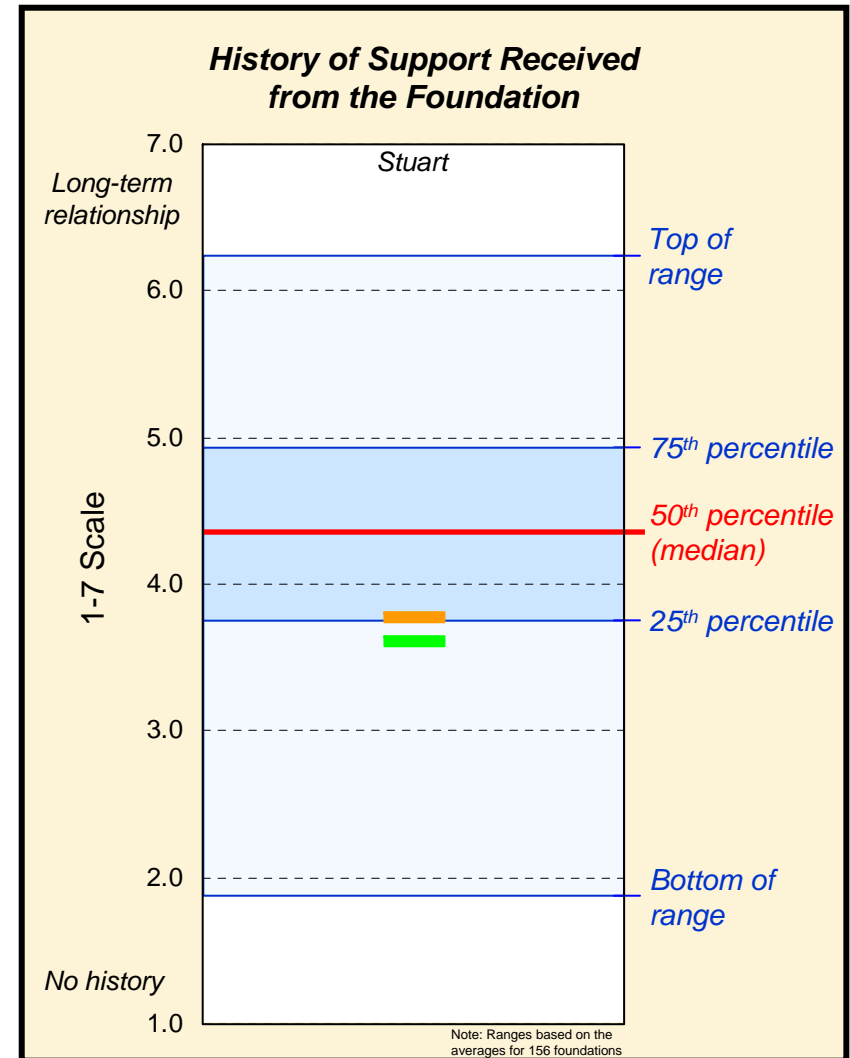
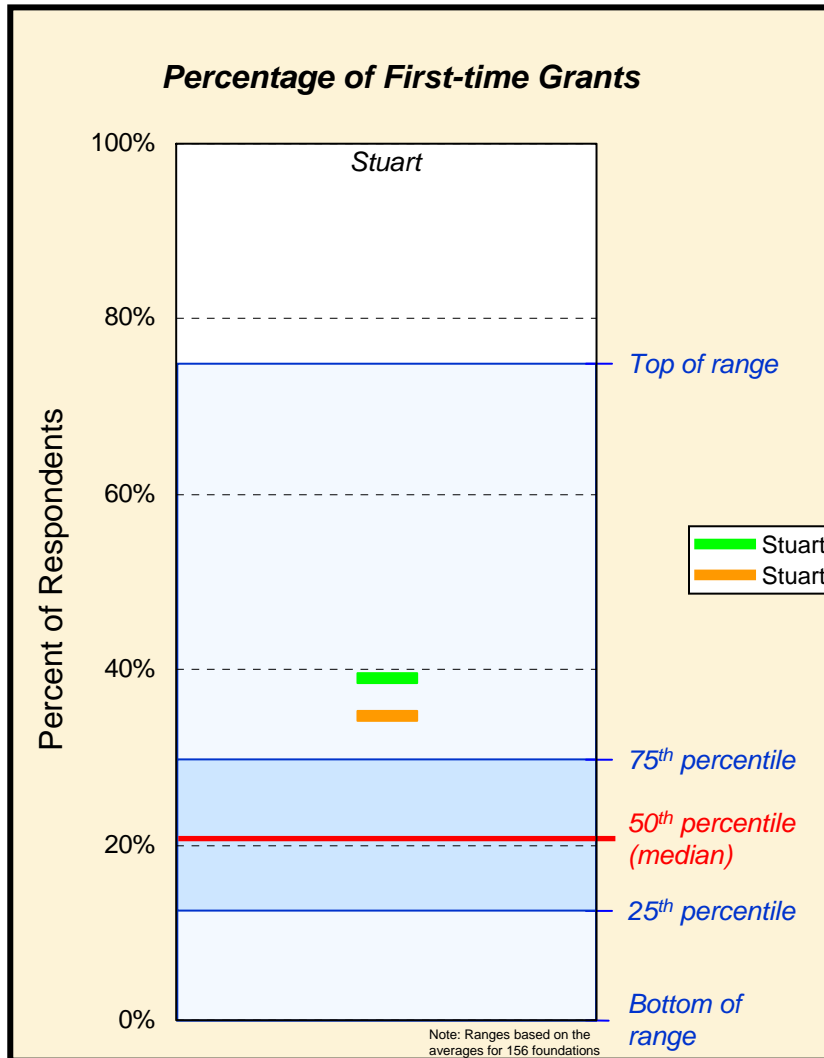
# Grant Length

The majority of Stuart grants are awarded for multiple years of funding.



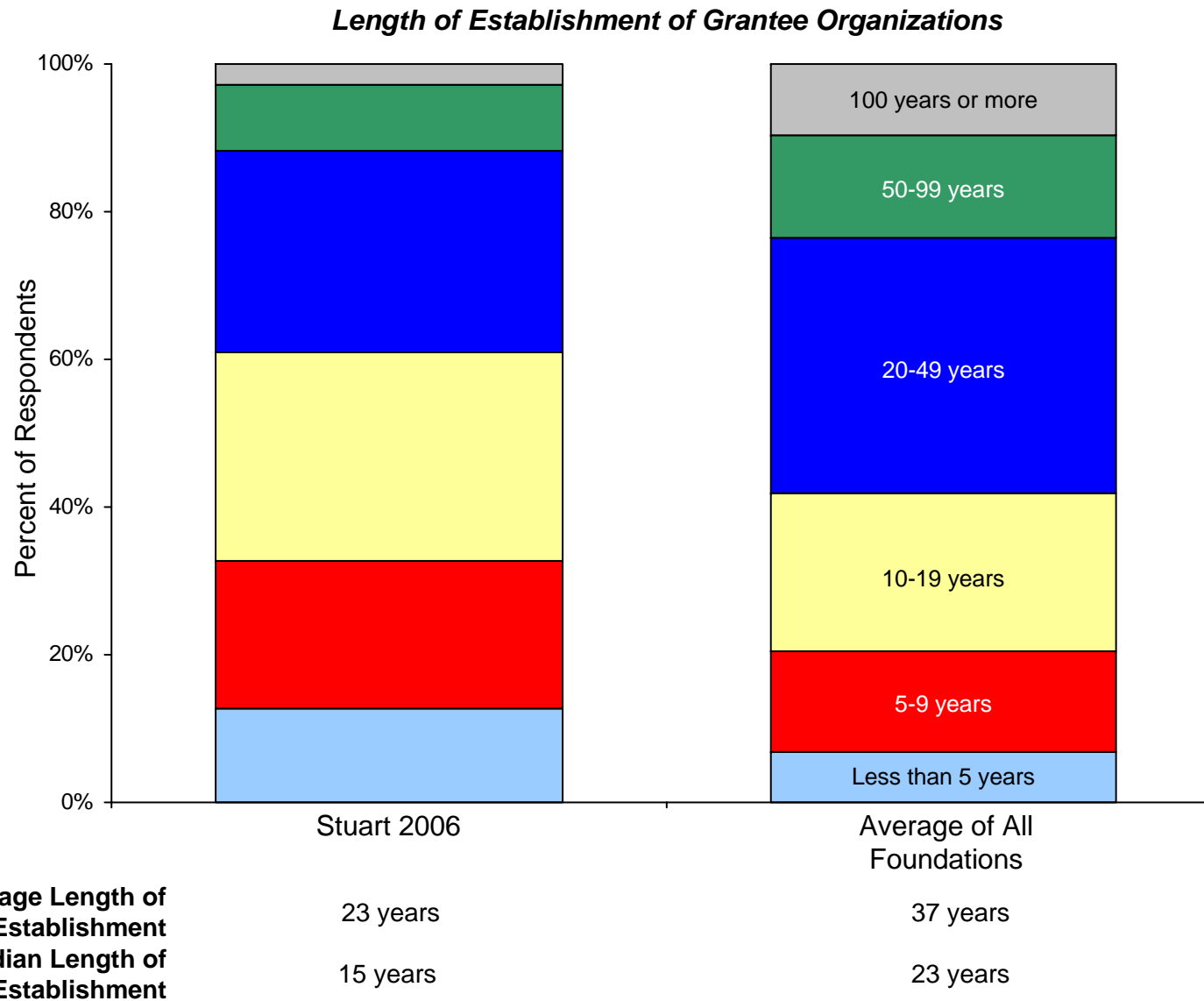
# History of Foundation Support

A larger proportion of Stuart grants are first-time grants than at the median foundation, and the Foundation's history of support is shorter than typical.



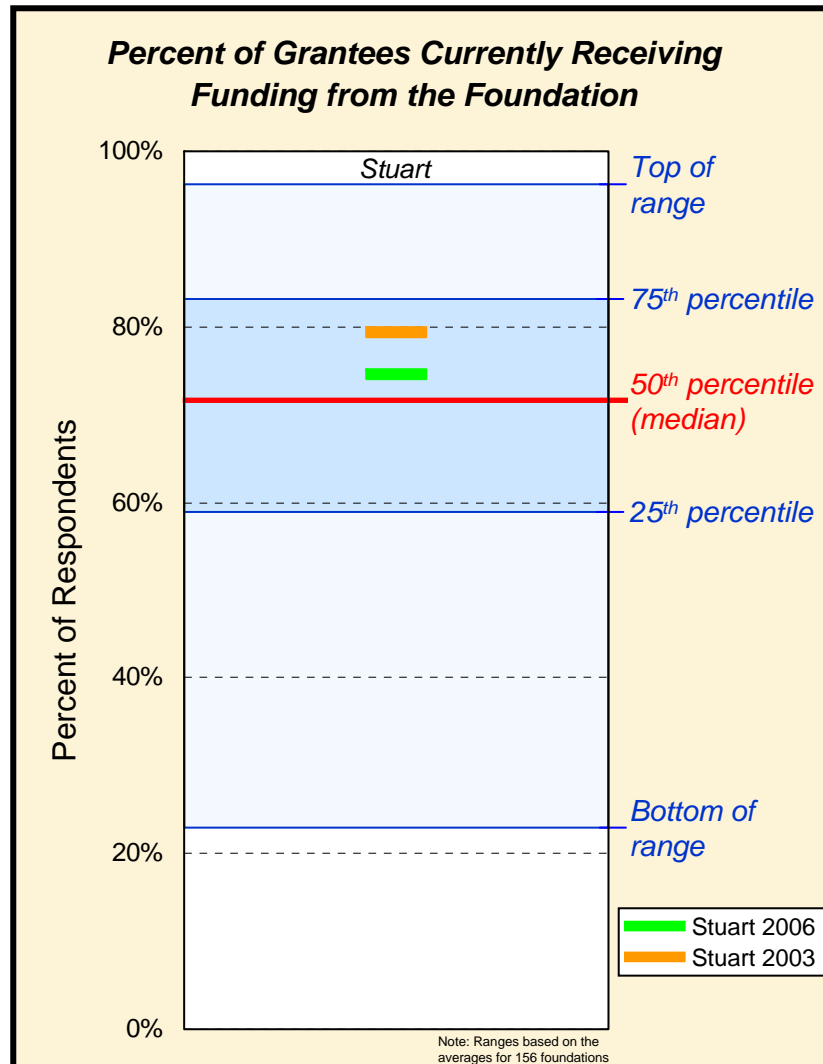
# Length of Establishment of Grantee Organizations

Stuart grantees are more recently established than grantees of the median foundation.



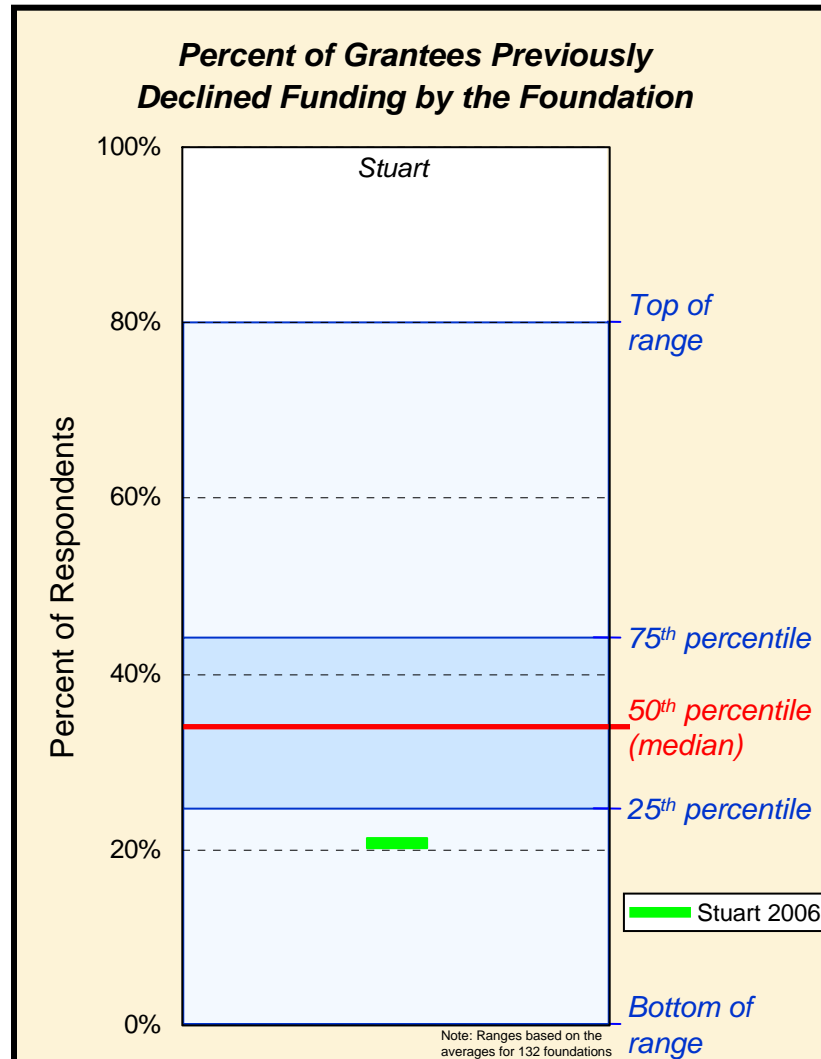
# Funding Status

Seventy-one percent of Stuart respondents were receiving funding from the Foundation at the time they completed the survey.



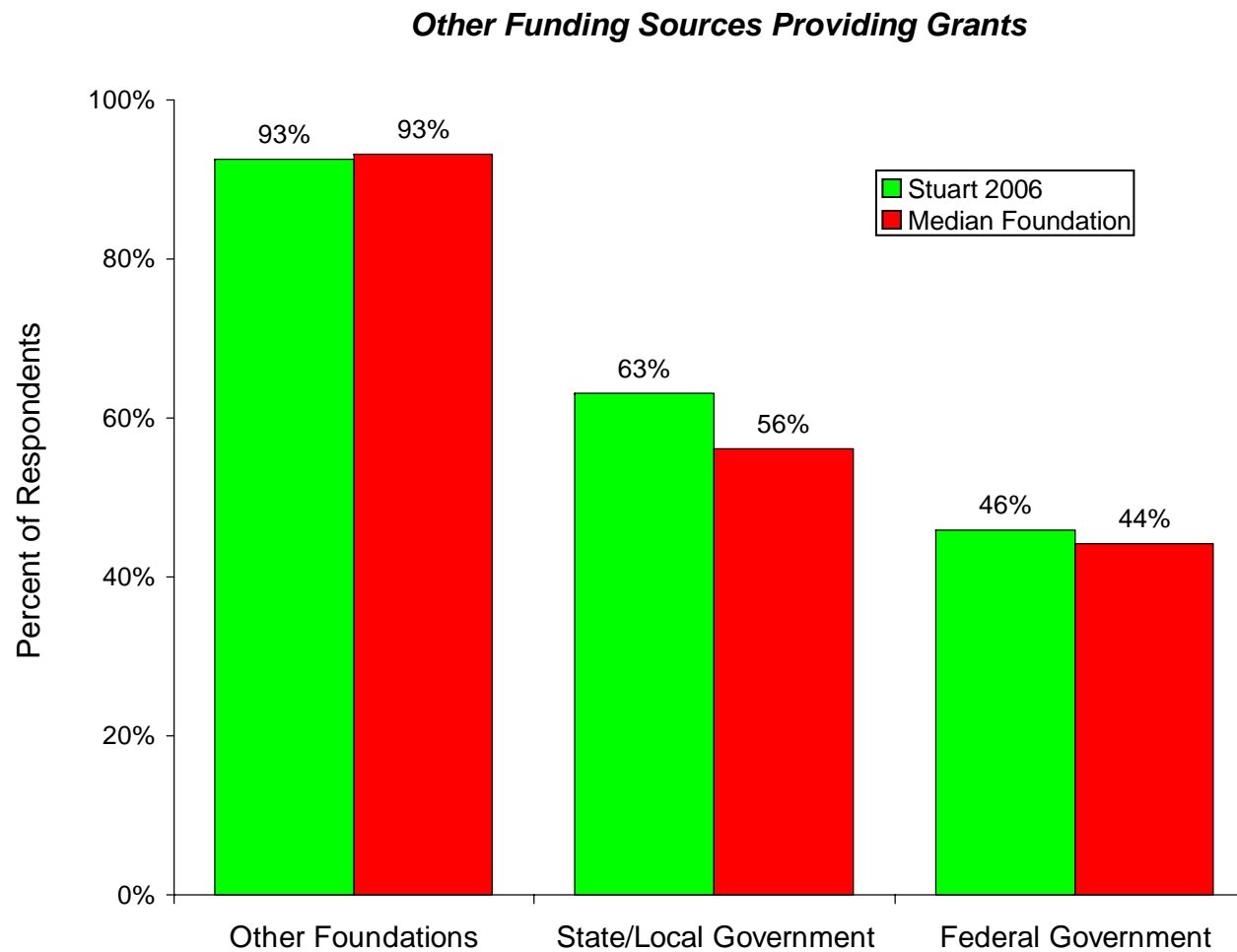
# Grantees Previously Declined Funding

Twenty-one percent of Stuart grantees report having previously been declined funding from the Foundation.



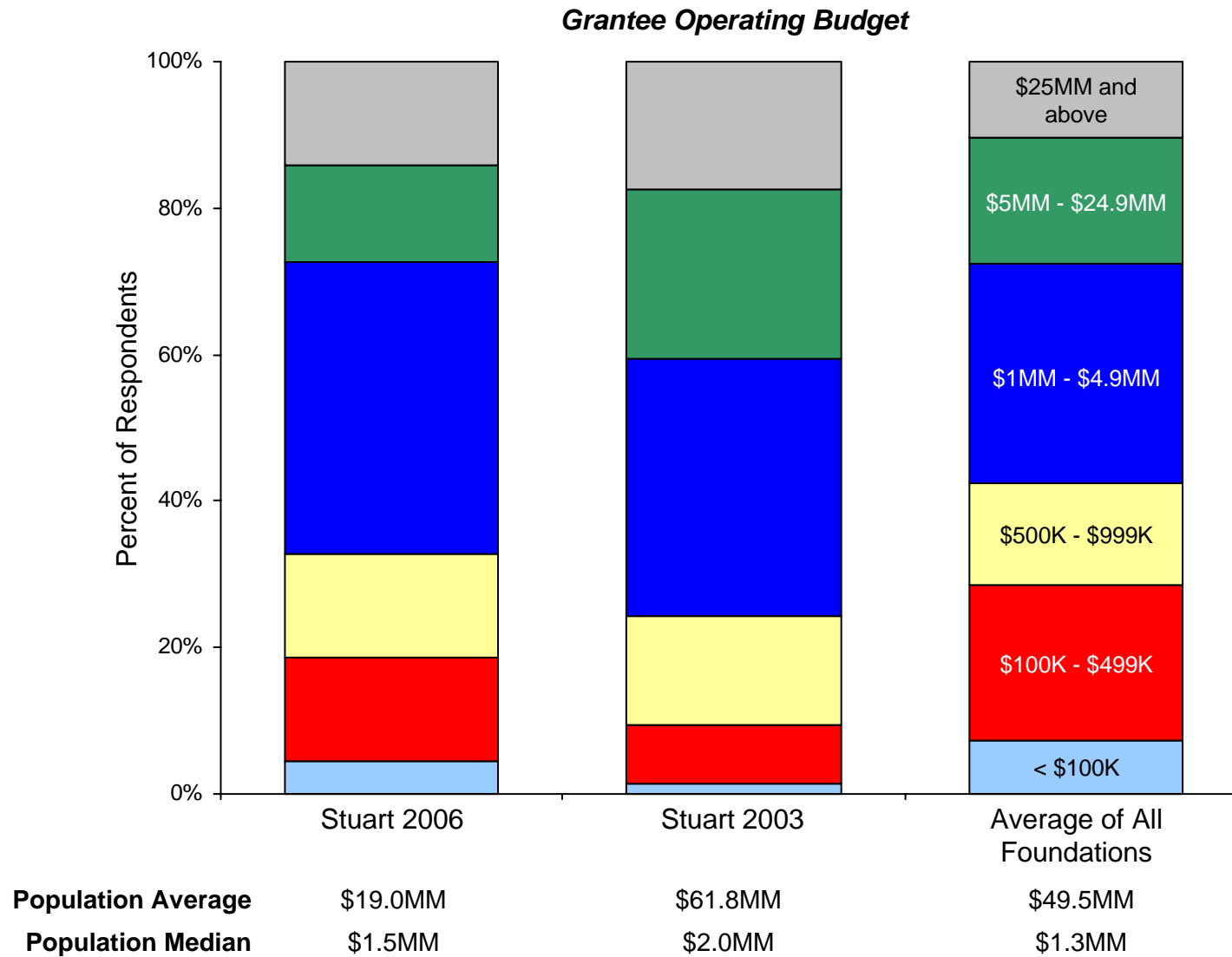
# Other Sources of Grants

A typical proportion of Stuart grantees report receiving funding from other foundations and state/local and federal government.



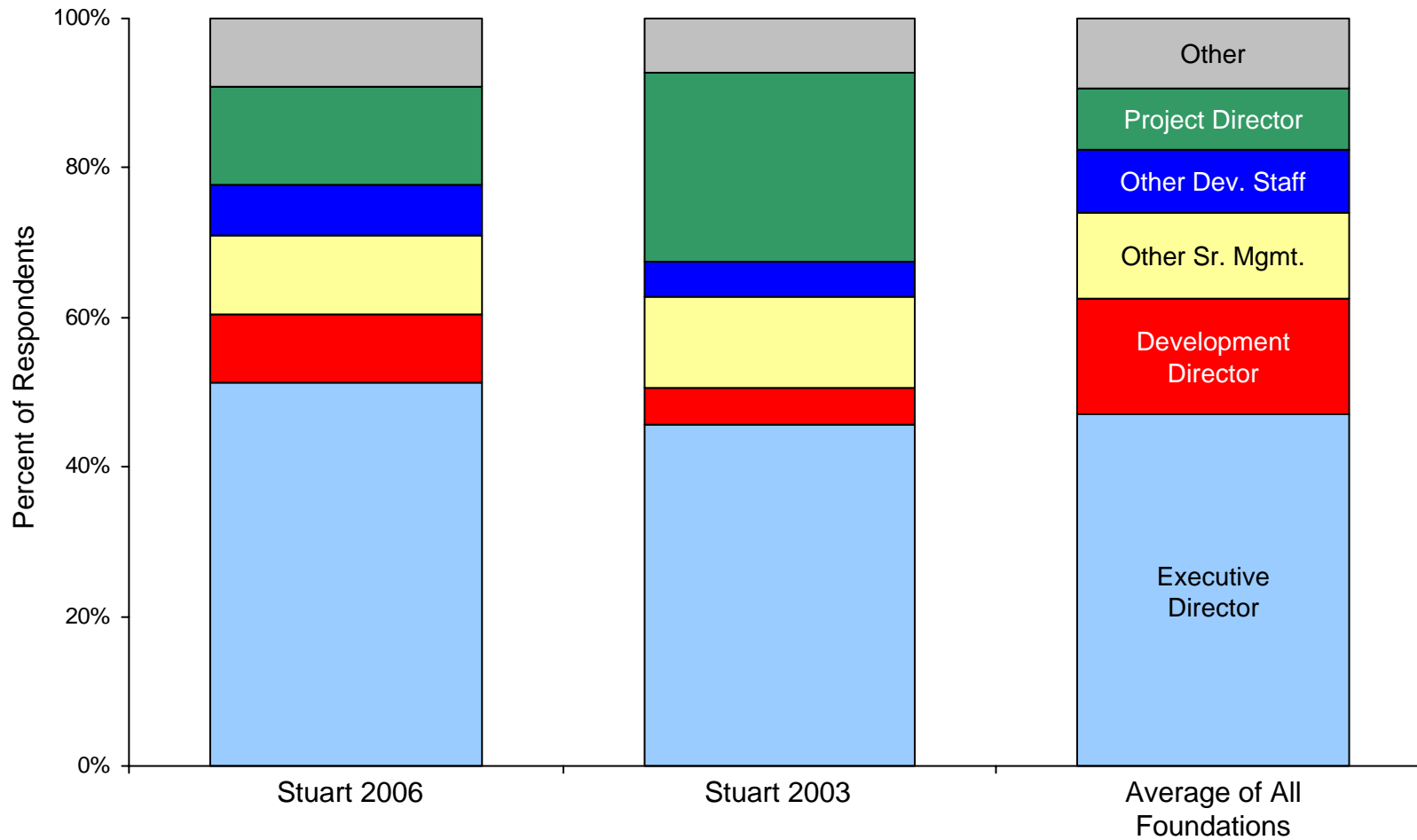
# Grantee Operating Budget

Stuart grantees are typical (in terms of median operating budget) compared to grantees of other foundations in our sample.

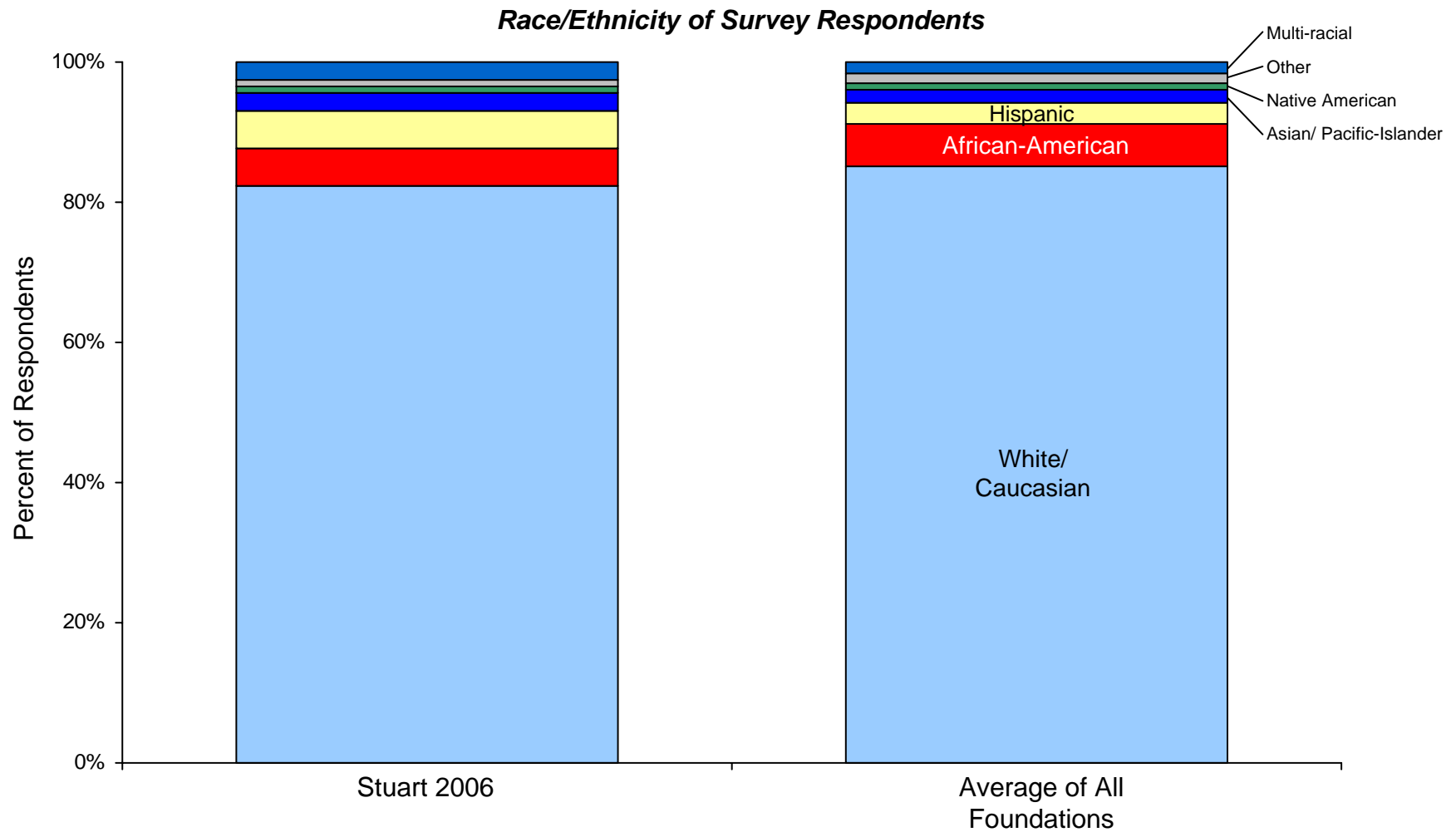


# Job Title of Respondents

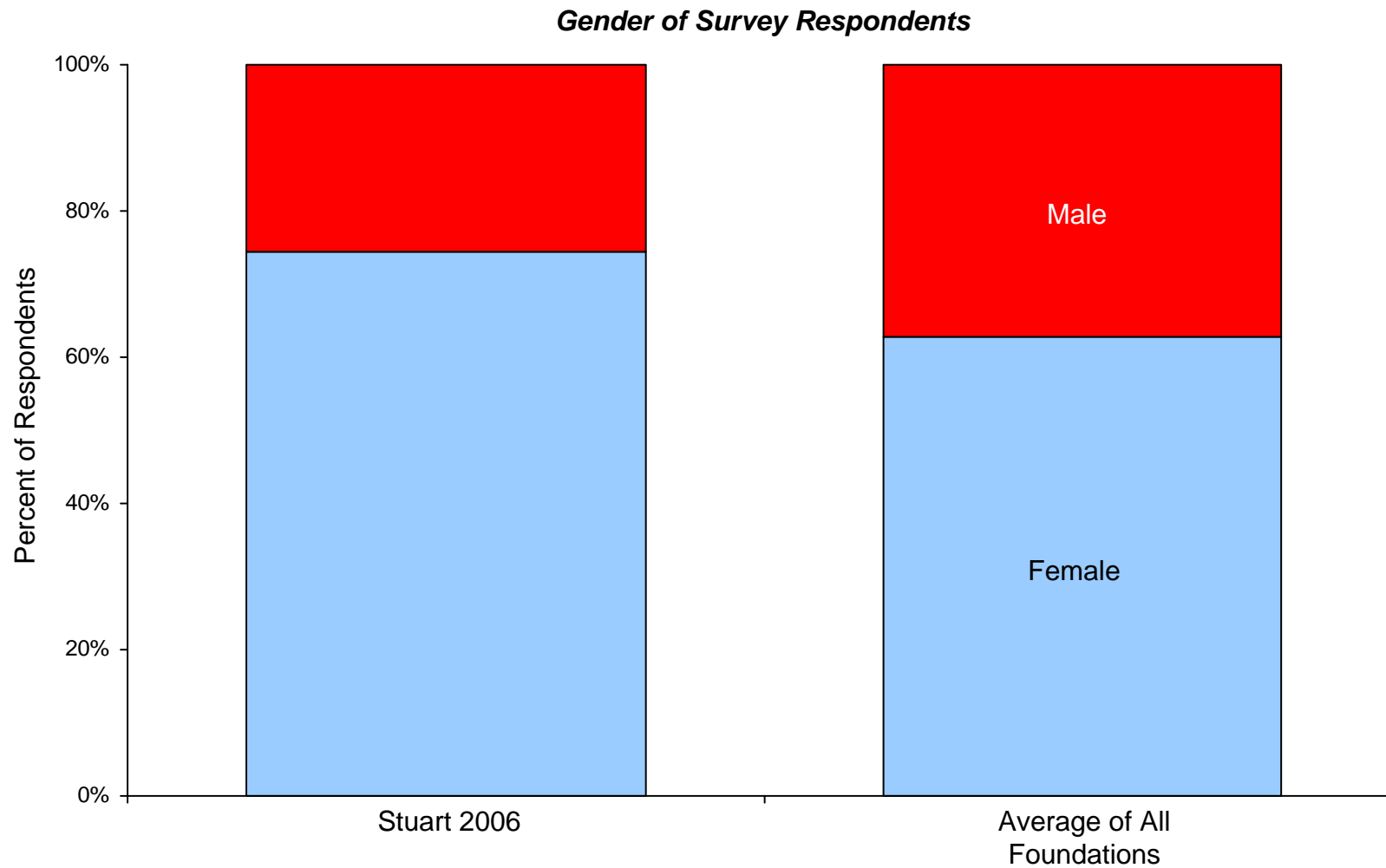
*Job Title of Survey Respondents*



# Race/Ethnicity of Respondents



# Gender of Respondents



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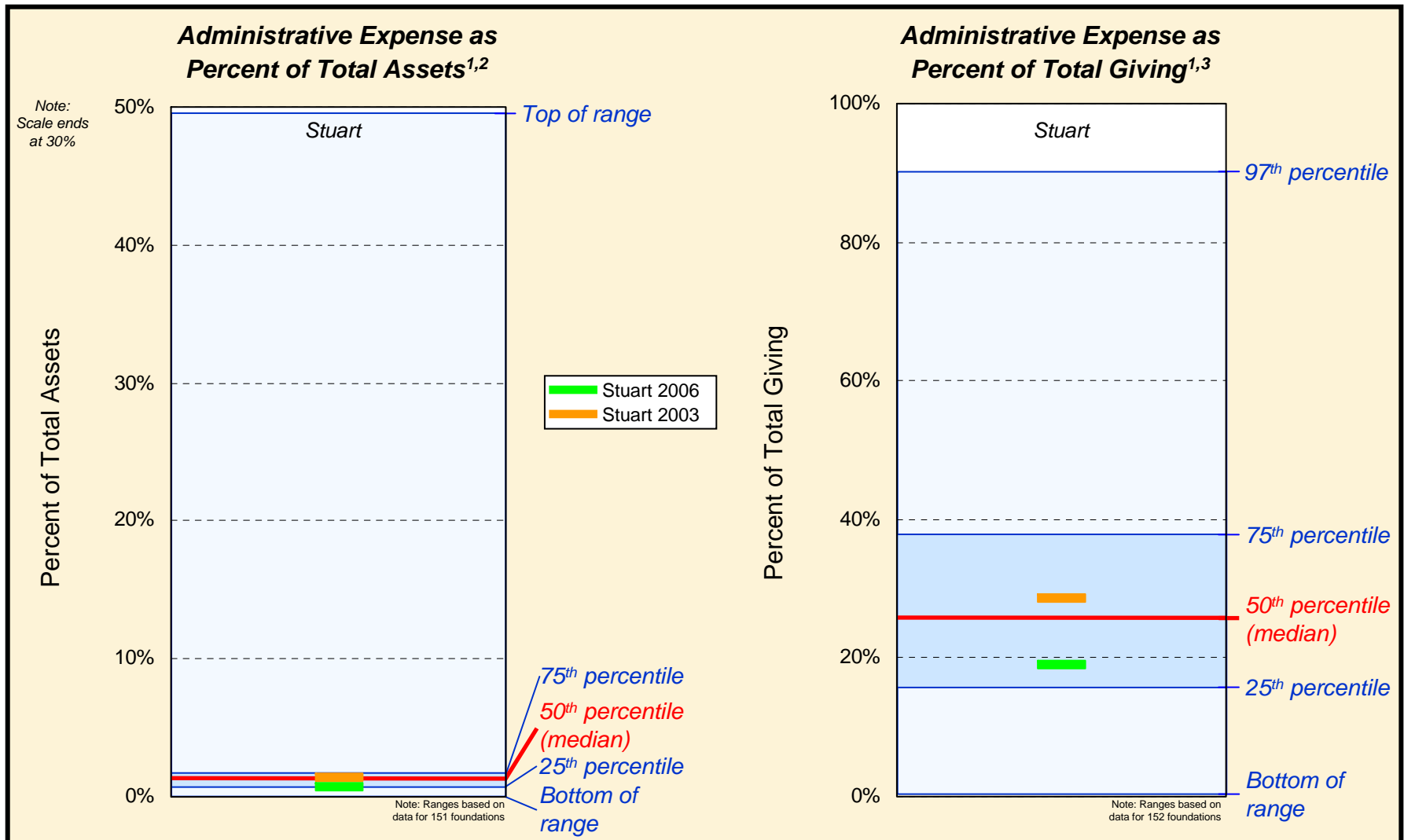
# Excerpt of Operational Benchmarking Report (OBR) Operational Benchmarking Report Excerpt



- ◆ The following section is an excerpt of CEP's Operational Benchmarking Report (OBR).
  - It contains charts based on data supplied by foundations that subscribe to the GPR and the OBR. This data is both from IRS tax filings as well as self-reported information.
- ◆ These pages are intended to provide context to the Foundation in thinking about its GPR results relative to its grantmaking and staffing.
  - Foundations of different sizes and focuses choose to structure their foundations differently – so, as with all the information contained in this report, the Foundation should interpret data in this section in light of its distinctive goals and strategy.

# Total Administrative Expense

Stuart spends a below median amount on administrative expenses as a percentage of total assets and as a percentage of total giving.

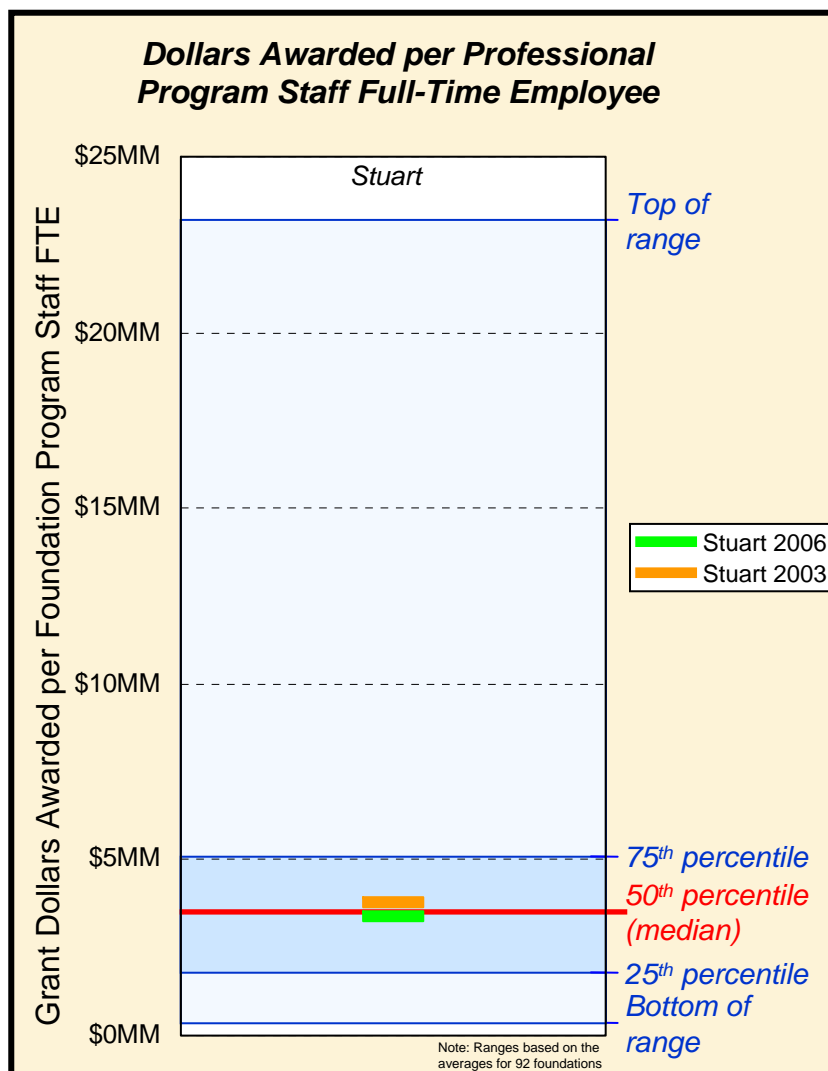


1: Total assets is in Box I on the 990-pf (line 21 on the 990), total administrative expense is line 24a (line 44a subtracting 22a on the 990), and total giving is line 25d (22a on the 990).

2: Five values of over 100% not shown.

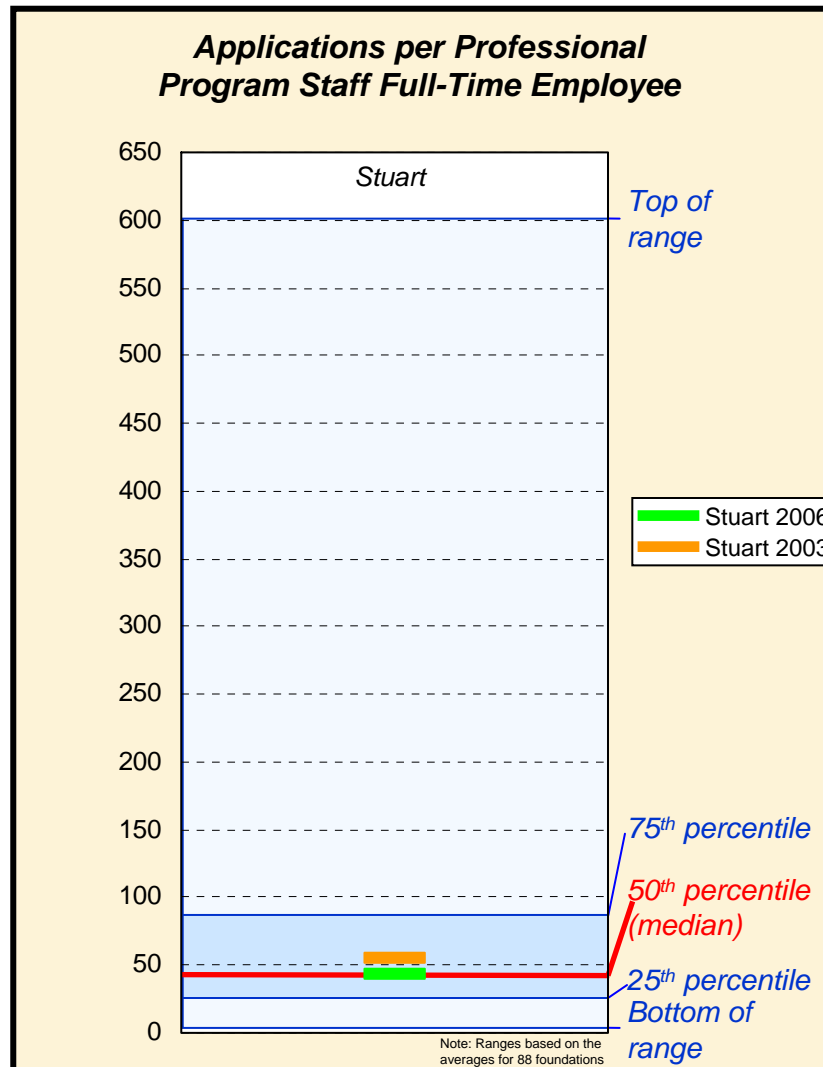
# Staff to Giving Ratio

Stuart awards a median number of dollars per professional program staff full-time employee.



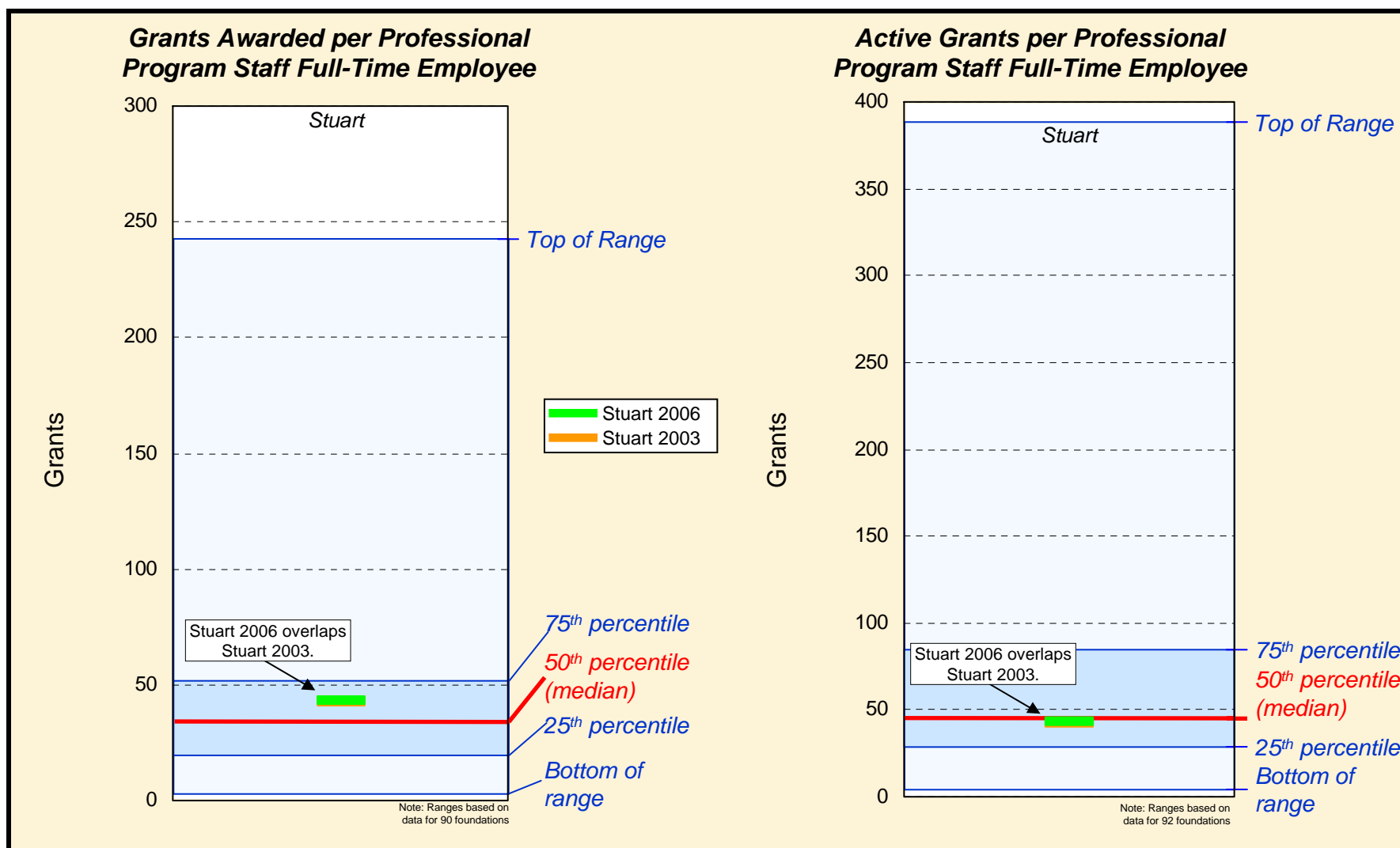
# Program Staff Load (1)

Stuart staff have a typical number of applications per program staff full-time employee.



## Program Staff Load (2)

Stuart is above the median in the number of grants awarded per professional program staff full-time employee and at the median in active grants per professional program staff full-time employee.



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# Foundations Included in Comparative Set (1)

The 156 foundations whose grantee ratings are included in the comparative set of this Grantee Perception Report are:

The Abell Foundation  
Adolph Coors Foundation  
The Ahmanson Foundation  
Alphawood Foundation  
Altman Foundation  
The Ambrose Monell Foundation  
Amelia Peabody Foundation  
Amon G. Carter Foundation  
Andersen Foundation  
Ann Arbor Area Community Foundation★  
The Annenberg Foundation  
The Anschutz Foundation  
The Assisi Foundation of Memphis★  
The AVI CHAI Foundation★  
Baptist Community Ministries  
Barr Foundation★  
Bill & Melinda Gates Foundation★  
Blandin Foundation★  
Blue Cross Blue Shield of Massachusetts Foundation★  
Blue Shield of California Foundation★  
The Boston Foundation★  
Bradley Foundation  
Bradley-Turner Foundation  
The Broad Foundation★  
The Brown Foundation★  
Bush Foundation★

The California Wellness Foundation  
The Cannon Foundation, Inc.  
Carnegie Corporation of New York★  
Carrie Estelle Doheny Foundation  
The Case Foundation★  
The Champlin Foundations  
Charles and Helen Schwab Foundation★  
Charles and Lynn Schusterman Family Foundation★  
Charles Stewart Mott Foundation★  
The Christensen Fund★  
Claude Worthington Benedum Foundation★  
The Clowes Fund★  
The Collins Foundation  
Community Foundation Silicon Valley★  
Community Memorial Foundation★  
Connecticut Health Foundation★  
Daniels Fund  
The David and Lucile Packard Foundation★  
Dekko Foundation  
Doris Duke Charitable Foundation★  
The Duke Endowment★  
E. Rhodes & Leona B. Carpenter Foundation  
Eden Hall Foundation  
The Educational Foundation of America  
El Pomar Foundation  
Endowment for Health★

# Foundations Included in Comparative Set (2)

- Evelyn and Walter Haas, Jr. Fund★
- The F.B. Heron Foundation★
- The Fan Fox and Leslie R. Samuels Foundation
- Fannie Mae Foundation★
- The Ford Family Foundation★
- France-Merrick Foundation
- The Frist Foundation
- The GAR Foundation★
- Gates Family Foundation
- The George Gund Foundation★
- Geraldine R. Dodge Foundation
- The Gill Foundation
- The Goizueta Foundation★
- Gordon and Betty Moore Foundation★
- The Grable Foundation★
- Grand Rapids Community Foundation★
- Gulf Coast Community Foundation of Venice★
- Hall Family Foundation
- The Health Foundation of Greater Cincinnati★
- The Heinz Endowments★
- Hess Foundation, Inc.
- HRJ Consulting (for an anonymous foundation)★
- The Hyams Foundation★
- J.A. & Kathryn Albertson Foundation
- The J. Willard and Alice S. Marriott Foundation
- The Jay and Rose Phillips Family Foundation
- Jessie Ball duPont Fund★
- Jessie Smith Noyes Foundation★
- The John A. Hartford Foundation, Inc.
- John D. and Catherine T. MacArthur Foundation★
- John P. McGovern Foundation
- The John R. Oishei Foundation★
- Kalamazoo Community Foundation★
- Kansas Health Foundation★
- Kronkosky Charitable Foundation★
- The Lenfest Foundation, Inc.
- Levi Strauss Foundation★
- Longwood Foundation
- The Louis Calder Foundation
- Lucile Packard Foundation for Children's Health★
- Lumina Foundation for Education★
- Maine Health Access Foundation★
- Mathile Family Foundation
- The McKnight Foundation★
- Michael Reese Health Trust★
- The Minneapolis Foundation★
- Missouri Foundation for Health★
- The Morris and Gwendolyn Cafritz Foundation
- The Mt. Sinai Health Care Foundation★
- The Nathan Cummings Foundation★
- The New Hampshire Charitable Foundation★
- The New York Community Trust★

# Foundations Included in Comparative Set (3)

- Nina Mason Pulliam Charitable Trust ★
- The Nord Family Foundation ★
- Omidyar Foundation ★
- The Overbrook Foundation
- Partnership for Excellence in Jewish Education (PEJE) ★
- Paul G. Allen Foundations ★
- Peninsula Community Foundation ★
- PetSmart Charities ★
- The Philadelphia Foundation ★
- Polk Bros. Foundation ★
- Public Welfare Foundation
- Quantum Foundation
- The Ralph M. Parsons Foundation
- Rasmuson Foundation ★
- The Rhode Island Foundation ★
- Richard M. Fairbanks Foundation, Inc. ★
- Robert R. McCormick Tribune Foundation
- Robert Wood Johnson Foundation ★
- Rockefeller Brothers Fund ★
- The Rockefeller Foundation ★
- Rollin M. Gerstacker Foundation
- Rose Community Foundation ★
- The Russell Family Foundation ★
- Ruth Mott Foundation ★
- S & G Foundation, Inc.
- S. H. Cowell Foundation ★
- The Saint Paul Foundation ★
- Santa Barbara Foundation ★
- SC Ministry Foundation ★
- Shelton Family Foundation
- The Shubert Foundation
- The Skillman Foundation
- Skoll Foundation ★
- Stuart Foundation ★
- Surdna Foundation ★
- T.L.L. Temple Foundation
- The Vermont Community Foundation ★
- Victoria Foundation
- Virginia G. Piper Charitable Trust ★
- W.K. Kellogg Foundation ★
- Waitt Family Foundation
- The Wallace Foundation ★
- Wellington Management Charitable Fund ★
- Wilburforce Foundation ★
- The William and Flora Hewlett Foundation ★
- The William K. Warren Foundation
- The William Randolph Hearst Foundations
- The William Stamps Farish Fund
- William T. Kemper Foundation
- Windgate Charitable Foundation, Inc.
- Winter Park Health Foundation ★
- Woods Fund of Chicago ★

# Foundations Previously Included in Comparative Set

In Spring of 2003, CEP surveyed the grantees of the following foundations. The average responses for these foundations are not included in the comparative set because CEP has opted to provide only more recently collected data – that which was collected over the last six survey rounds (three years) – in Grantee Perception Reports.

Alfred P. Sloan Foundation  
The Clark Foundation  
The Cleveland Foundation ★  
The Columbus Foundation ★  
Dyson Foundation ★  
F. M. Kirby Foundation, Inc.  
The George S. and Dolores Dore Eccles Foundation  
The Greater Cincinnati Foundation ★  
The Harry and Jeanette Weinberg Foundation, Inc.  
Horace W. Goldsmith Foundation  
Houston Endowment ★  
J. Bulow Campbell Foundation  
James Graham Brown Foundation, Inc.  
Kate B. Reynolds Charitable Trust  
Meyer Memorial Trust  
The Pew Charitable Trusts  
Pritzker Foundation  
Richard & Rhoda Goldman Fund ★  
Richard King Mellon Foundation  
The Sherman Fairchild Foundation, Inc.  
Wayne & Gladys Valley Foundation ★  
Weingart Foundation  
The William Penn Foundation ★  
Z. Smith Reynolds Foundation

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# About the Center for Effective Philanthropy (CEP)

## Mission

**To provide management and governance tools to define, assess, and improve overall foundation performance.**

## Vision

**A world in which pressing social needs are more effectively addressed. We believe improved performance of foundations can have a profoundly positive impact on non-profit 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:

Bill & Melinda Gates  
Foundation



Charles Stewart Mott Foundation

The David and Lucile Packard  
Foundation



KAUFFMAN  
Foundation



MACARTHUR



STUART FOUNDATION  
INVESTING IN CHILDREN & YOUTH



THE WILLIAM  
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 foundation field, and programming. CEP's research initiatives focus on several subjects, including:

- **Overall Performance Assessment**
- **Foundation Program Strategy**
- **Foundation Governance**
- **Foundation-Grantee Relationships**
- **Operational Benchmarking**

# CEP Assessment Tools

CEP provides foundation leaders with assessment tools – utilizing comparative data – that inform overall performance assessment:

- **Grantee Perception Report® (GPR):** an assessment tool that provides foundation CEOs, boards, and staff with comparative data on grantee perceptions of foundation 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):** a self-assessment tool for foundations that provides data on board structure and trustee perceptions of board effectiveness
- **Staff Perception Report (SPR):** explores foundation staff members' perceptions of foundation effectiveness and job satisfaction on a comparative basis
- **Operational Benchmarking Report (OBR):** provides comparative data, relative to a selected peer group of foundations, on aspects of foundation operations – including foundation staffing, program officer workload, grant processing times, and administrative costs

## Contact Information

- ◆ This report was produced for the Stuart Foundation in summer 2006 by the Center for Effective Philanthropy. Please feel free to contact CEP with any questions about this report.
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