



GROUP

L e a r n i n g f o r A c t i o n

# Key Findings from the Grantee Perception Report (GPR) Subscriber Assessment

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## Table of Contents

|   |           |
|---|-----------|
| <b>I. Introduction and Methods .....</b>  | <b>1</b>  |
| Background and Context on the GPR.....  | 1         |
| Overview and Purpose of this Assessment .....   | 1         |
| Subscriber Assessment Methods.....  | 2         |
| A Note on Presentation and Discussion of the GPR Subscriber Assessment Results.....       | 3         |
| Characteristics of GPR Assessment Survey Respondents .....                                | 4         |
| <b>II. Key GPR Subscriber Assessment Findings.....</b>                                    | <b>5</b>  |
| Why Funders Choose the GPR.....   | 5         |
| How the GPR Compares to Other Measures of Funder Effectiveness .....                      | 5         |
| Satisfaction with the GPR Process, Report, and Usefulness .....                           | 7         |
| <b>III. The GPR’s Influence on Organizational Practices .....</b>                         | <b>10</b> |
| GPR-Informed Change in Funders .....  | 10        |
| Changes the GPR Sparks .....  | 12        |
| How the GPR Informs Change in Funders .....   | 13        |
| <b>IV. The Value of Commissioning the GPR Multiple Times.....</b>                         | <b>15</b> |
| Comparing the Overall Experience of Repeat GPR Subscribers to First-Time Subscribers..... | 15        |
| Satisfaction with the GPR Process, Report, and Usefulness among Repeat Subscribers .....  | 15        |
| <b>V. Satisfaction with the CEP Team and the GPR Process .....</b>                        | <b>17</b> |
| Reflections on CEP Staff .....  | 17        |
| Satisfaction with the GPR Process .....   | 18        |
| <b>VI. Conclusion .....</b>   | <b>19</b> |
| <b>Appendix A: The GPR Subscriber Assessment Survey Instrument .....</b>                  | <b>21</b> |

# I. Introduction and Methods

## *Background and Context on the GPR*

The Center for Effective Philanthropy (CEP) provides funders with data that reveal insights into how they can better define, assess, and improve effectiveness and impact. Specifically, CEP creates assessment tools, disseminates research-based publications, and provides programming with the goal of catalyzing funders to develop clearer goals; coherent, well-implemented strategies; and relevant performance indicators. CEP's flagship assessment tool is the Grantee Perception Report (GPR).

CEP developed the GPR as one tool for measuring funder effectiveness.<sup>1</sup> First launched in the Spring of 2003, the GPR is an assessment process involving the administration of a survey to grantees of funders. The GPR instrument asks grantees to rate the funder's performance and effectiveness in the following areas:

- Interactions during the grant;
- The application and reporting processes;
- Perceived funder impact; and
- Assistance beyond the grant.

The GPR offers unique value because in addition to providing a summary of results for the individual funder, it also indicates how results stack up relative to a comparison group of other funders. This comparative assessment allows a funder to understand its grantee-rated performance against benchmarks established by the comparison group of other funders whose grantees CEP has surveyed.

## *Overview and Purpose of this Assessment*

This is the fourth report of findings from the ongoing GPR Subscriber Assessment study conducted by the independent research and evaluation firm LFA Group<sup>2</sup>. The primary areas of focus for LFA's assessment of the GPR include:

1. Funder satisfaction with the GPR process and product, and with CEP's presentation of the data to commissioning funders;
2. Specific areas for improvement highlighted in the GPR that the funder has taken action to change; and
3. The overall value of the GPR relative to cost, expectations, and other funder assessment processes available or undertaken.

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<sup>1</sup> CEP also offers other services to assess funder effectiveness, including a declined Applicant Perception Report, which funders often commission concurrent with the GPR. Visit <http://www.effectivephilanthropy.org> for more information.

<sup>2</sup> Formerly LaFrance Associates, LLC.

Additionally, for the first time, LFA's 2009 GPR assessment study asked subscribing funders to identify their primary CEP staff contact. LFA used this data point to conduct analysis on key dimensions related to funder satisfaction, likelihood of repeating the GPR, and others to understand interactions with specific CEP staff. Due to the confidential nature of these findings, they are not included in this report, and were shared with CEP for use in its professional development process.

## Subscriber Assessment Methods

LFA designed an on-line assessment survey based on the study purposes.<sup>3</sup> With data from the three previous GPR Subscriber Assessments (conducted in July 2005, May 2007, and November 2008), LFA worked with CEP to modify the survey instrument slightly in an effort to continually improve the quality and relevance of data collected. In particular, the survey was modified this year to improve the data collected related to changes funders make as a result of the GPR.

### Survey Response Rates

- **37 of 46** funders (59%) responded to the 2009 GPR Subscriber Assessment Survey.
- Across the four GPR Subscriber Assessment Survey studies, **133 of 210** funders (63%) have responded.

Over the course of the four GPR Subscriber Assessments, CEP has provided LFA with the list of primary contacts at each of the funders for which about one year has passed since receiving their report and presentation from CEP on their GPR results. The GPR Subscriber Assessment survey is sent about one year after a funder receives its GPR results to allow time for funders to implement GPR-informed change. In total, 133 of 210 funders completed the on-line survey, representing a respectable 63% response rate.

This fourth GPR Subscriber Assessment looks at the overall satisfaction and experience of all GPR subscribers as well as offering data on the effects of repeat GPR usage. The overall sections of this report compare satisfaction, changes instigated by the GPR, and the experience of GPR users across survey time points. The analysis of repeat GPR subscribers similarly compares repeat users across time points, as well as examining the differences, if any, in the perception of the GPR's value held by repeat subscribers as compared to first-time users.

LFA's data analyses on the quantitative survey results include univariate statistics (e.g., frequencies of response, mean, median, etc.) and bivariate statistics (e.g., analysis of variance and chi-square tests of independence). Bivariate analyses explored differences in results regarding satisfaction with and utility of the GPR, based on key independent variables such as funder asset size; funder type; and GPR "round" (i.e., when the funder commissioned the GPR). LFA also conducted content analysis to identify themes arising from open-ended questions included on the assessment survey.

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<sup>3</sup> Please refer to the Appendix of this report for a copy of the 2009 GPR Assessment Survey.

### **Study Strengths**

There are several strengths of this assessment. First, the strong rate of response reduces concerns about sample bias. Second, in nearly every case, LFA was able to get feedback from the staff person who had been most directly involved in the GPR process with CEP, providing access to the most direct source of information on the GPR experience. Third, and perhaps most critically, CEP's use of an external evaluator to assess their work provided a safe and comfortable opportunity for GPR subscribers to submit honest feedback confidentially, without fear or concern that CEP would be able to link individual responses to names or organizations. Fourth and finally, LFA has been using a very similar GPR Subscriber Assessment survey instrument across the four years of our study of the GPR; this allows for an over-time comparison of results, enriching our understanding of how effective the GPR is and has been in achieving its intended purposes.

### **Limitations**

This assessment also has some limitations. Primarily, the survey relies on individual self-reports rather than observations, which may introduce bias, particularly with respect to questions about areas of change in which funders have engaged. Results should be interpreted with this caution in mind.

## ***A Note on Presentation and Discussion of the GPR Subscriber Assessment Results***

Findings in this report include data from this most recent GPR Subscriber Assessment in comparison to historical GPR Subscriber Assessment data collected by LFA in 2008, 2007, and 2005. This presentation format serves to highlight key differences, if any, in the characteristics of survey respondents as well as draw attention to changes in satisfaction and usefulness scores between the 2009 assessment and the previous three assessments. Due to close similarities in findings from the 2005 and 2007 studies, LFA combined data from these years for ease of visual representation. Statistically significant findings between and among the survey years are noted throughout the report.

Additionally, this assessment report offers the perspective of funders that have commissioned the GPR two or more times. These data provide insight into the unique value of conducting the GPR in cycles over time. We found statistically significant findings when comparing first-time GPR subscribers with repeat subscribers; these findings are noted throughout this report.

Three overarching stories emerge from the 2009 GPR Assessment:

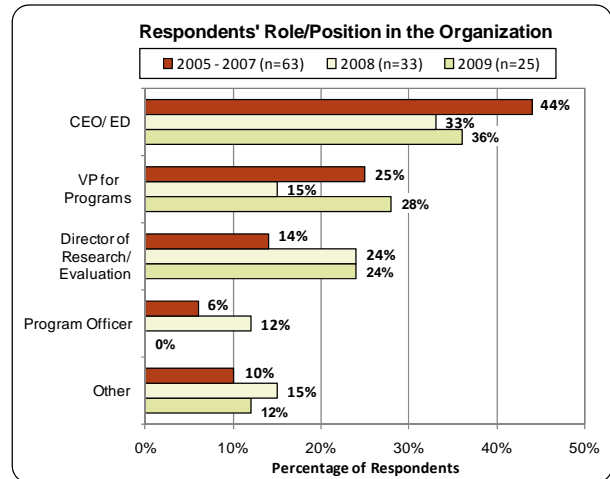
1. While overall satisfaction is up, levels of satisfaction with specific aspects of the GPR and ratings of usefulness dipped some in 2009, and are closer to the still positive 2005 through 2007 levels;
2. More GPR users report making significant changes as a result of the GPR compared to previous assessments; and
3. Repeat-user findings related to satisfaction and usefulness dipped in 2009 as compared to 2008, as well, and are similar to first-time GPR user ratings.

## Characteristics of GPR Assessment Survey Respondents

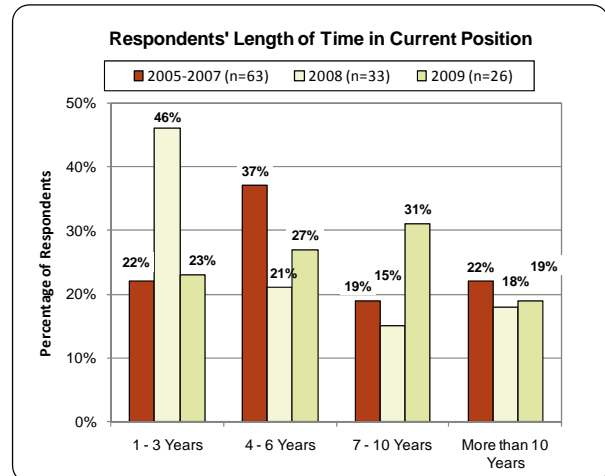
LFA distributed the GPR assessment survey to each funder's primary staff contact with CEP at the time the GPR was commissioned. This model for administering the survey ensures that those individuals who have the most extensive interaction with CEP provide responses related to satisfaction, changes within the organization as a result of the GPR, and their perception of the GPR's value. This survey distribution model has been the same for each of the four LFA-conducted assessments. Respondent positions for each assessment year are shown in Exhibit 1. The notable changes in 2009 include a decrease in primary contacts in the Program Officer position and the return of those in Vice President of Programs positions acting as primary contacts with CEP.

These primary contacts have been in their current positions for a broad range of years, with three-quarters (77%) of the 2009 respondents in their current jobs for four or more years. This proportion mirrors the 78% of respondents in their positions for four or more years in the 2005-2007 dataset, as displayed in Exhibit 2.

**Exhibit 1**



**Exhibit 2**



## II. Key GPR Subscriber Assessment Findings


### *Why Funders Choose the GPR*

A primary goal of funders in undertaking the GPR is to obtain objective, anonymous data from which to learn about the quality of relationships with grantees and identify targeted areas for improvement. When asked about motivations for undertaking the GPR, funders commonly indicate a desire for “detailed, anonymous data about our relationship with agencies and opportunities for improvement,” or “to assess our performance in working with grantees and applicants and to learn from the results and incorporate them into our work.” The GPR provides an opportunity to initiate a safe, ongoing feedback loop with grantees.

Funders use the GPR both to test assumptions and inform changes in grantmaking process. The GPR’s “honest assessment” of grantee satisfaction provides funders with needed data to support “process changes with boards.” Additionally, funders choose the GPR in order to track changes in their own performance as well as compare their performance against peers: the GPR both establishes baseline data against which funders “benchmark future improvements” and provides funders with the highly valued “ability to rate against a cohort of comparative foundations.”

Funders are also motivated to participate in the GPR to help them understand their grantees’ experiences more clearly. Funders are interested in both feedback from grantees as well as a better understanding of how they are viewed by grantees. The ability to see through the lens of the grantee creates an opportunity for reflection and action for funders.

### *How the GPR Compares to Other Measures of Funder Effectiveness*

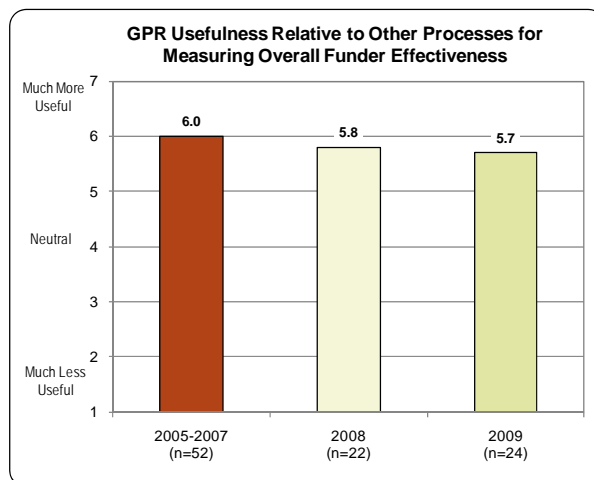
In 2009, nine out of ten (92%) GPR subscribing funders identify the GPR as more useful than other processes undertaken to assess overall funder effectiveness.<sup>4</sup> Exhibit 3 below  shows that the mean usefulness scores of the GPR dipped slightly compared to 2008, however remain near the high-end of the 7-pt Likert “usefulness” scale. The dip in mean scores is slight, resulting from a different distribution of responses along the scale than previous years; and, possibly the result of new funder assessment tools or processes entering the landscape. In 2008, eleven respondents indicated that they had no relevant point of reference with which to compare the GPR (and are excluded from analysis); whereas in 2009, only two respondents indicate having no point of reference with which to compare the GPR.

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<sup>4</sup> LFA assessed satisfaction and/or usefulness on a 7-point scale, with 1 indicating ‘not at all satisfied/useful and 7 indicating ‘very satisfied/useful.’ In interpreting results, LFA considered rankings of  $\geq 5$  to indicate “satisfied” or “useful.”


In open-ended comments, respondents continue to remark that CEP’s role as an external collector of grantee perceptions enables funders to solicit anonymous feedback. These “unvarnished insights” are highly regarded and consistently mentioned as a useful aspect of the GPR. Respondents also highly value that the GPR allows participants to benchmark their organization against peer funders. Comparative data and objective assessment of funder performance are what make the GPR stand out relative to other processes for measuring overall funder effectiveness.

**Exhibit 3**



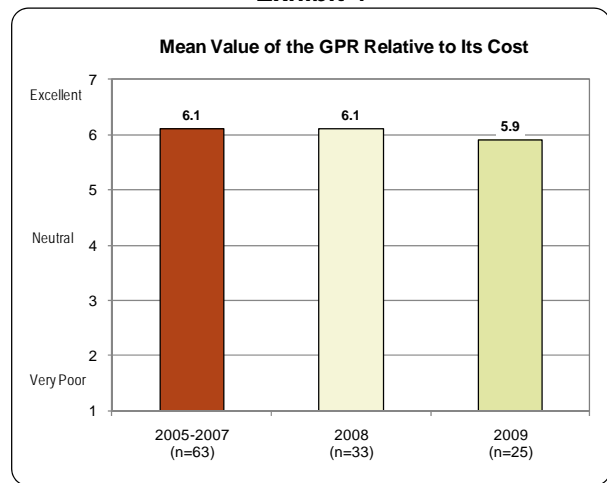
This idea of collecting anonymous, comparative data, combined with the positive reputation of CEP as an organization specializing solely in improving funder effectiveness, results in GPR subscribers positively assessing the GPR process as considerably more useful than other evaluation processes undertaken in the past.

Consistent with comments emerging in the 2008 GPR assessment, many funders in 2009 indicated that the GPR is a very effective component within a larger system of assessing funder performance. Funders reported that the GPR is particularly valuable in assessing grantmaking processes and grantee relationships; other tools are more effective in assessing strategic priorities. One respondent’s comment articulated the consensus among respondents that “the GPR is a core, essential part of our fairly extensive foundation assessment activities – particularly its use of comparative data with other foundations.” Others noted that the GPR is more valuable when “it is consistently administered” over time to allow funders to “build on trends over time.” While multiple funders found the GPR to have the greatest utility when used as one of a set of tools to assess funder effectiveness, respondents emphasized the GPR’s unique contribution: “it measures something different than other processes ... it ranks very highly among all the tools and processes we use.”

GPR subscribers consider the GPR very valuable relative to its cost as well, with roughly three quarters (72%) of survey respondents rating the GPR a six or higher on the 7-point scale. As shown in Exhibit 4 below , the mean score for the GPR’s value relative to its cost is 5.9 in 2009, down slightly from previous assessments. However, this is a very small change, and the decline is not statistically significant.

Open-ended responses reveal a similar finding: funders say the GPR is expensive, but worth the value for the type of comparative information it gathers, the ability to customize questions, the in-person presentations and quality of service provided. One (smaller/medium) funder found the cost too expensive for every year, and indicated that their organization would repeat the GPR, “but not soon.” Larger funders found the “extensive comparisons with other foundations” over time “well worth the investment.” Even in the current economic context, the ability to track change in funder effectiveness over time maintains the GPR as a valued assessment tool: “All costs are under scrutiny in the current environment; the GPR was retained after evaluation of its importance to foundation evolution.”

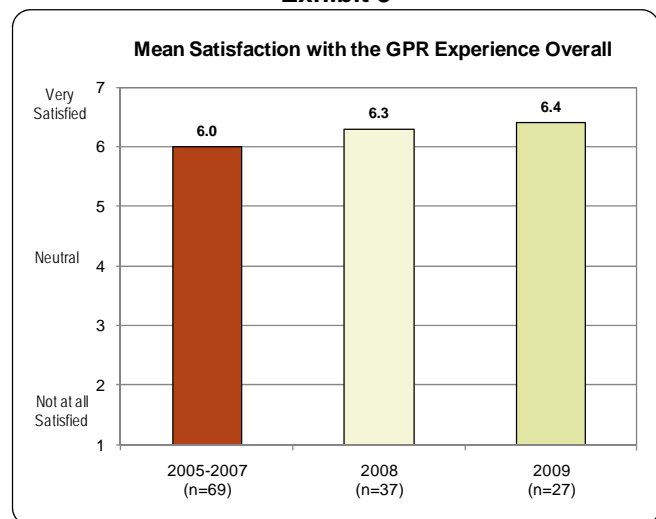
**Exhibit 4**



**Satisfaction with the GPR Process, Report, and Usefulness**

Funders commissioning the GPR continue to be overwhelmingly satisfied with the GPR experience; and the 2009 respondents report a slightly higher level of overall satisfaction than previous years’ assessments, a trend of increased scores that has occurred steadily over the course of LFA conducting the GPR assessment study. See Exhibit 5. And, 85% of 2009 respondents rate their overall GPR experience a six or higher on the 7-point scale.

**Exhibit 5**



As Exhibit 6 shows, funders also rate highly their satisfaction with the GPR report.

However, the 2009 data reveal a slight drop in the overall scores as compared to 2008. These declines, in general, return to levels of satisfaction with the GPR report as found in the 2005-2007 assessments. While not all the declines from 2008 to 2009 are statistically significant, the pattern is consistent across dimensions and presents CEP a compelling reason to investigate any internal changes that may have affected these average scores.

**Exhibit 6**  
**Satisfaction with the GPR Report**

| Area of Satisfaction with the GPR Report  | Mean<br>(7-point scale) |      |      | Direction of<br>Change |
|---|-------------------------|------|------|------------------------|
|   | 2005-<br>2007           | 2008 | 2009 |                        |
| The extent to which the GPR report highlighted specific areas in which your foundation was performing well (n=64, n=34, n=26)                             | 5.8                     | 6.3  | 6.0  |                        |
| The extent to which the GPR report highlighted specific areas in which your foundation could improve performance (n=65, n=34, n=26)                       | 5.7                     | 6.2  | 5.9  |                        |
| The extent to which CEP's interpretation of the results was meaningful for guiding reflection on your foundation's performance overall (n=66, n=33, n=26) | 5.7                     | 6.2  | 5.9  |                        |
| The clarity of data charts and graphs in the GPR report (n=66, n=34, n=26)  | 5.3                     | 5.5  | 4.9  | **                     |
| The usefulness of the GPR report on its own, without CEP staff explanation (n=66, n=34, n=26)   | 4.8                     | 5.3  | 4.7  | *                      |

\*\* Significant at p≤.05

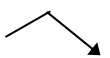
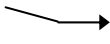
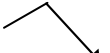
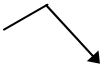
\* Significant at p≤.1

Furthermore, analysis of the 2009 data indicates that funders continue to rely on and highly value the in-person presentations by CEP staff to fully understanding the results included in its GPR report. Funders rated the supplemental in-person presentations and the customary in-person presentations the most helpful of all services and deliverables provided by CEP. Like the table above, Exhibit 7 reveals that while the helpfulness of CEP services and deliverables in understanding the GPR remain high, the trends are mixed. One dimension's mean score has risen across GPR subscriber assessments, two have remained constant with 2008 levels, and five have declined since highs in 2008.

**Exhibit 7**  
**Helpfulness of the GPR Report and Presentations**

| Aspects of the GPR Report and Presentations Received                                       | Mean<br>(7-point scale) |      |      | Direction of<br>Change |
|--|-------------------------|------|------|------------------------|
|  | 2005-<br>2007           | 2008 | 2009 |                        |
| Supplemental and/or additional in-person presentation(s) (n=35, n=22, n=19)                | 6.2                     | 6.4  | 6.6  |                        |
| In-person presentation by CEP staff (n=60, n=32, n=21)                                     | 6.4                     | 6.5  | 6.5  |                        |
| Telephone conversation with CEP staff about preliminary report findings (n=22, n=33, n=24) | 6.0                     | 6.3  | 6.0  |                        |
| Segmentation of the data by program area (n=50, n=24, n=17)                                | 5.6                     | 6.3  | 5.8  |                        |

**Exhibit 7**  
**Helpfulness of the GPR Report and Presentations**

| Aspects of the GPR Report and Presentations Received   | Mean<br>(7-point scale) |      |      | Direction of<br>Change   |
|--|-------------------------|------|------|--|
|  | 2005-<br>2007           | 2008 | 2009 |  |
| Custom segmentation of data by other grouping (n=38, n=21, n=7)  | 6.0                     | 6.5  | 5.7  |  *  |
| Segmentation of the data by program officer (n=9, n=9, n=9)  | 5.9                     | 5.7  | 5.7  |     |
| Comparison to a custom group of funders (n=52, n=21, n=23)   | 6.0                     | 6.2  | 5.4  |  ** |
| Provision of sample communications to grantees or other constituents from other funders (n=32, n=18, n=14) | 5.6                     | 6.0  | 4.7  |  ** |

\* Significant at  $p \leq .1$   
\*\* Significant at  $p \leq .05$

One hundred percent (100%) of 2009 respondents indicate that in-person presentations are helpful, with 67% reporting the presentations are “very helpful.”<sup>5</sup> Additionally, 95% of GPR subscribers rate the supplemental in-person presentations as helpful.


Upon closer examination of the data behind the results displayed above, we found that there are a few 2009 respondents distinctly less satisfied with the GPR report – rating it, and CEP’s analysis, less helpful. This finding is inconsistent with previous assessments, where responses tended to wholly cluster in the top range of the 7-point scale. Examples of these lower scores include one funder who found no value in the comparison to a custom group of funders and a repeat subscriber who remarked that the GPR “findings [are] too broad to understand what specifically could be done--no real recommendations.” Nonetheless, as discussed later in this report, all first-time and repeat GPR users indicated a willingness to recommend the GPR to colleague organizations.

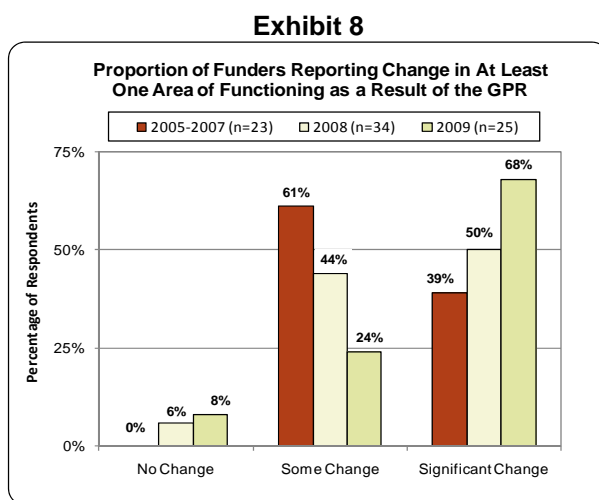
Additional analysis was also conducted by the evaluation team to assess if differences in findings between assessment periods depicted throughout this report are correlated to differences in the characteristics of respondents. This analysis provided some insights. In general, vice presidents of programs rated aspects of the GPR lower than other positions, and program officers rated dimensions higher. Those in their current position 7 years or longer also generally rated dimensions higher than those in positions less time. However, these findings are not statistically significant and not universally true – while vice presidents of programs rated aspects of the GPR lower in many instances, it was not always the case. The same is true for length of tenure; ratings are often higher for those in their current position 7 or more years, but not in all instances.


<sup>5</sup> The *helpfulness* scales are also 7-pt scales, with 1 indicating “Not at all Helpful” and 7 indicating “Very Helpful.” In interpreting results, we considered rankings of  $\geq 5$  to indicate “helpful.”

### III. The GPR's Influence on Organizational Practices

#### GPR-Informed Change in Funders

The GPR provides funders with a reliable methodology for gathering anonymous, candid grantee assessments of funder practices and benchmarks those results against a comparison group. But do funders' GPR findings lead to change? The extent to which funders make changes as a result of their GPR findings is the greatest indicator of the tool's success. And, by this measure, the GPR is effective: 92% of 2009 respondents report that the GPR resulted in some change in their organizations (See Exhibit 8 ).<sup>6</sup> Furthermore, in the 2009 GPR assessment, substantially more respondents indicate making significant changes in at least one area of organizational functioning as a result of the GPR as compared to previous assessment periods.



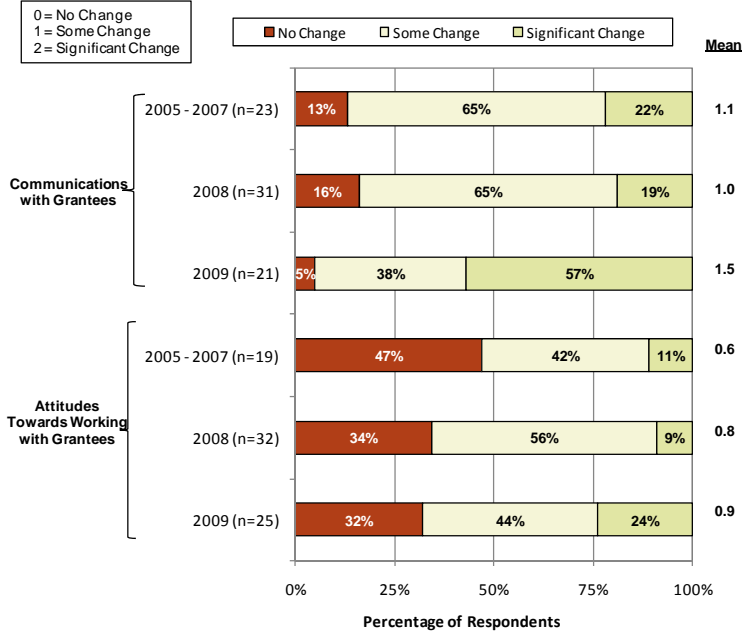
Exhibits 9 through 12  show the degree to which the GPR affected change in specific areas of functioning for grantmaking organizations. Four years of GPR Subscriber Assessment data demonstrate that the GPR speaks most effectively to funders about their communication practices as well as the impact of grantmaking requirements on grant-seeking organizations. Providing assistance to grantees beyond “the check,” also exhibited significant change in 2009. In general the intensity of change made by funders in 2009 remained at levels similar to 2008, and increased most noticeably in the areas of communications with grantees, attitudes toward working with grantees, and provision of assistance beyond the check, and grantmaking processes.

Additionally, a new response option was added to the 2009 survey questions regarding change affected by the GPR, asking if the GPR is a tool for funders to evaluate previous change rather than to instigate change. These funders were provided the option to indicate that the organization “did not make specific changes, but instead wanted to confirm the impact of previous changes.” In three areas of organizational functioning, three or fewer respondents indicated that the 2009 GPR was utilized to evaluate previous change. This response option will be tracked in future GPR assessments.

<sup>6</sup> LFA implemented new survey questions in 2006 and 2007 to better measure and understand the types and quality of change foundations undertook based on GPR results. The findings presented here are for foundations commissioning the GPR after 2006.

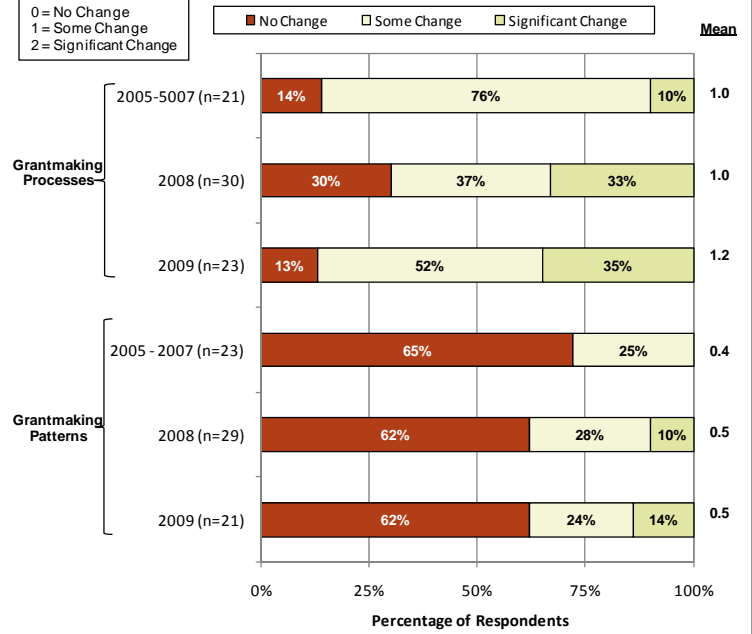
**Exhibit 9**

**Interaction with Grantees: Extent of Change Informed by GPR**



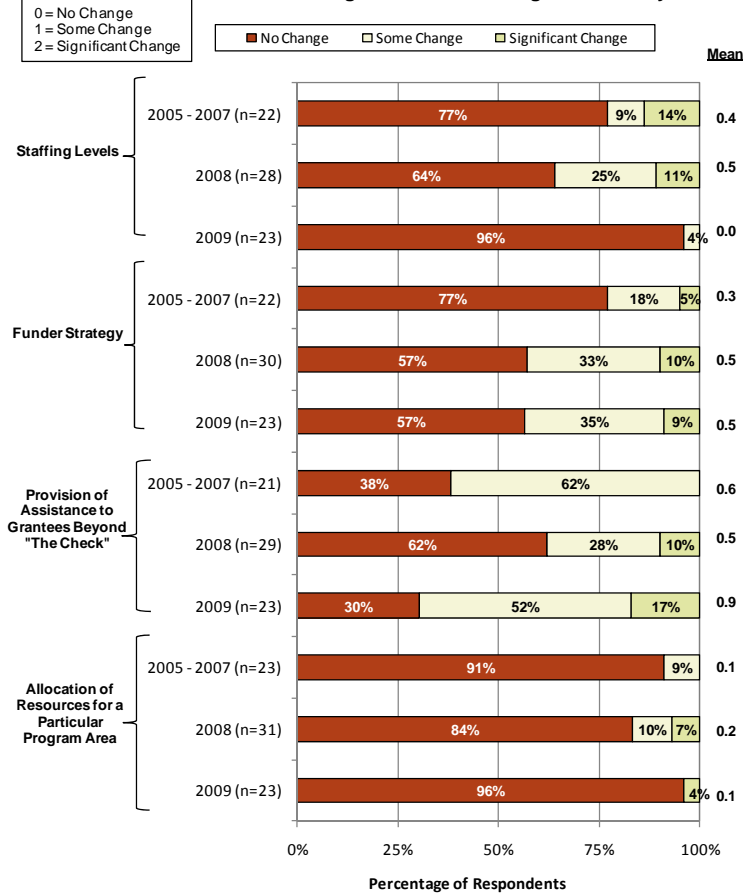
**Exhibit 10**

**Grantmaking: Extent of Change Informed by GPR**



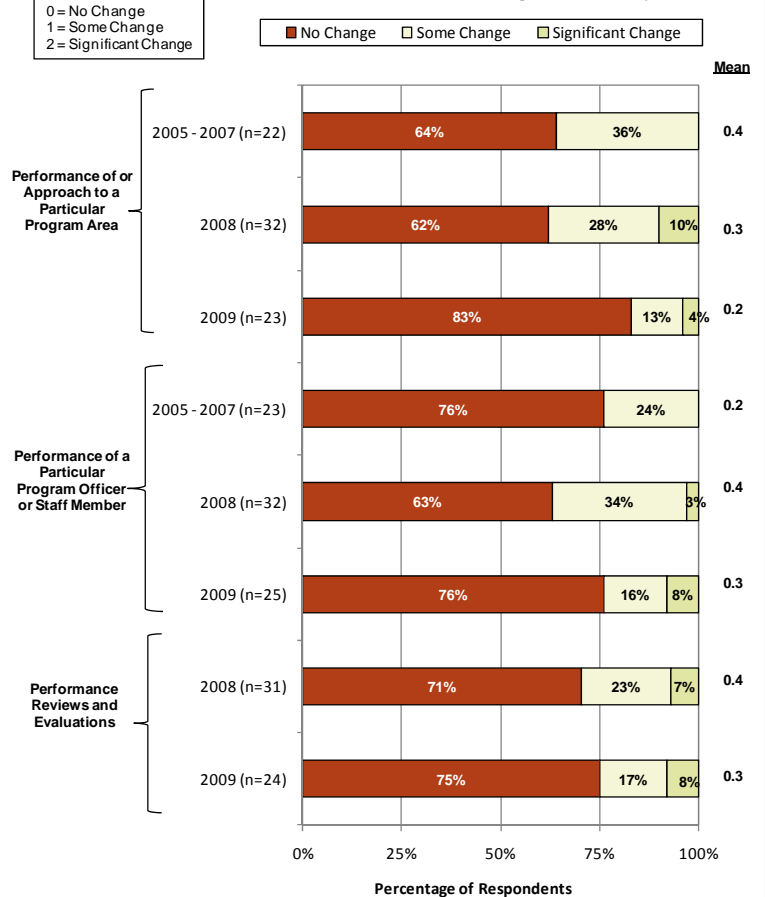
**Exhibit 11**

**Funder Strategies: Extent of Change Informed by GPR**



**Exhibit 12**

**Performance: Extent of Change Informed by GPR**



Overall, the GPR most directly allows funders to gather grantee perceptions about interactions with the organization and, not surprisingly, leads to changes in how funders partner with grantees. Most often these are changes in communications and grantmaking processes. The following sections provide a summary of these themes that emerged from analysis of the open-ended survey question: “please briefly describe the one or two most significant changes the GPR informed.”

### GPR Spurs Change

- **On average, 4.4 changes** in organizational functioning are made as a result of the GPR.

## Changes the GPR Sparks

### Grantee Engagement

Ninety-five percent (95%) of respondents report making a change to improve communications with grantees as a result of the GPR. As with previous GPR Subscriber Assessment findings, the 2009 data show that the GPR results push funders to develop improved communication strategies with grantees to address power dynamics between funders and grantees and to clarify the messages funders aim to communicate with grant seeking organizations. Funders repeatedly noted the need for “consistent written and verbal communication messages,”

“improving consistency and regularity of communication,” “communicating more clearly,” “increasing public communication efforts,” and “auditing all communications for clarity and completeness.”

### Changes in Grantee Engagement

- *One funder that showed significantly higher ratings in its second GPR explained the improvements as follows: “We strove for an attitude of mutuality with grantees – a mindset that there was an equal exchange of value going on with each side possessing equal power.” These efforts were complemented by “a major emphasis...put on simplification and transparency of our processes and strategic statements.”*

Some examples of improvements that funders made are:

- To revise or improve their communications with grantees for greater transparency and clarity of expectations, including a new emphasis on sharing evaluation results with grantees, making declination letters more specific and offering personal consultation on how to improve a request
- To emphasize building equal relationships of mutual exchange with grantees

## Grantmaking Processes

The majority of GPR subscribing funders (87%) also made changes to their grantmaking processes as a result of GPR findings. Open-ended survey responses reveal that these change efforts focused on simplifying grant application processes.

The following are examples of the most common changes funders are making to their grantmaking processes as a result of the GPR:

- Shorter applications and decreased processing time for grants below a certain dollar amount;
- Resetting the grant schedule to minimize errors and inefficiencies;
- Increased attention to transparency in grantmaking processes.

### Changes in Grantmaking Processes

- *One funder stated that the most significant change made as a result of the GPR was “Separating strategic grants from smaller expressive grants (now handled by a separate team).”*
- *“We revamped our grantmaking processes to become more efficient and transparent to grantees.”*
- *“We have revised our strategy to focus much more on non-cash contributions to organizations... now we are focusing on core support, capacity building and leadership development.”*

## Additional GPR-Inspired Changes

The fact that GPR results most directly impact areas of grantee engagement and grantmaking processes is not to say that the GPR does not affect changes in other areas of organizational functioning. In some cases, it illuminates areas of functioning in need of attention and change. In other instances the GPR plants a seed for further funder assessment in areas related to strategy or staff performance.

For one funder, the GPR highlighted a need to “increase staff and professionalize staff.” Another funder stated that GPR results inspired “more specialization by program area among our program officers.” Other funders remarked that the GPR ignited larger change processes. “At a very high/abstract level it signals that something is amiss. It helped start a change process but did not signal specific areas that needed to be addressed.”

## How the GPR Informs Change in Funders

For funders, the GPR results are valuable both in challenging and confirming assumptions. The following are different ways that the GPR can spark action.

### **The GPR can expose an area that requires attention.**

In keeping with the findings summarized above, information surfaced by the GPR challenged funder assumptions related to communications. Particular areas for improvement highlighted through the GPR led funders to place greater emphasis on building relationships with the “nonprofit community” and grantees. Consistency and clarity of communication came up frequently

as requiring attention. The GPR led one funder to “simplify the final report process, particularly for renewal grants,” and to intentionally engage grantees in meaningful conversations regarding final reports. Other funders reported their surprise at finding that the “dollar return summary” was “much lower than ... imagined,” and the “level of administrative burden was reported as higher than previously understood.” The GPR also provoked valuable dialogue within organizations. One funder shared an anecdote about how “our average impact on grantees’ communities and fields prompted a very helpful and clarifying conversation about theory of change.”

### **The GPR can raise awareness about the importance of funder services.**

Not surprisingly, many funders accurately predicted aspects of their GPR results, whether the findings were positive or negative. Even when funders stated that they assumed they were “moving in the right direction,” or “‘on track’ to achieve its missions objectives,” the GPR often provided useful data to validate this assumption. Common areas for improvement assumed by funders and confirmed by grantees included duplicative application processes and the need for more “grantee-oriented” grantmaking. Funders completing the GPR for a second time assumed that they would rate much higher in their second GPR, due to the changes they had made from the first report: “We strongly believed we had made some important and effective changes after receiving the poor results. The results from the second report confirmed this expectation.” The GPR not only surfaces actionable information that leads to concrete changes in funder functioning, but serves as a means to benchmark progress after implementing those changes.

### **The GPR can help create organizational buy-in for change.**

Several respondents spoke of how the GPR results are being used to inform aspects of strategic planning and, in some cases, the GPR offered evidence that proposed future changes in functioning were on the mark and needed to be executed. As one funder shared, “We have always had a very personal approach to our grantmaking, but this helped us really codify our partnerships with grantees and put things in place that make us truly ‘vested’ in their success.” According to another funder, “Results affirmed efforts to streamline the application process, which staff had wanted, but the board was more reticent – but not after the CEP results.”

### **The GPR can provide positive feedback to funder staff.**

One important function of the GPR is its ability to reinforce the good work of many funders. Looked at this way, several funders noted in open-ended comments that the GPR validated staff’s positive personal impressions of their operations. One funder said simply, “It confirmed our belief that our program officers are seen by grantees as treating them fairly and providing them with value-adding service.”

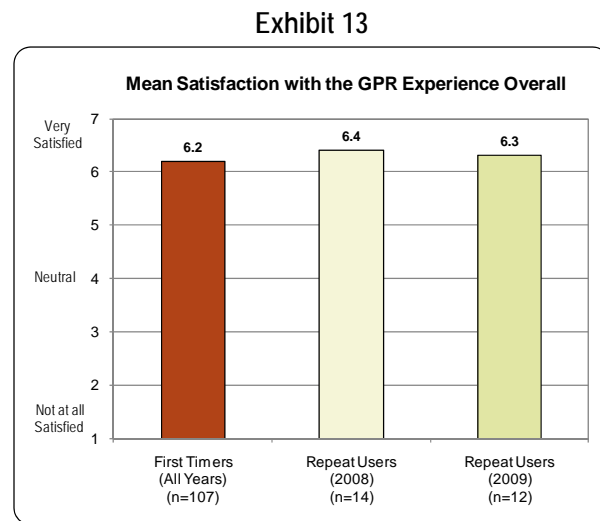
## IV. The Value of Commissioning the GPR Multiple Times

This GPR Subscriber Assessment Report marks the second time LFA gathered quantitative data from funders commissioning the GPR two or more times. This section of the report discusses the key differences between the experience and satisfaction of repeat GPR users and those of first-time users. For this analysis, LFA looked at the aggregate first-time GPR subscriber data from 2005 to 2009 in comparison to repeat subscribers.

### Comparing the Overall Experience of Repeat GPR Subscribers to First-Time Subscribers

Exhibit 13 shows a slightly higher overall level of satisfaction with the GPR experience among repeat subscribers than with first-time users of the GPR.

The 2009 repeat users are motivated to conduct multiple GPRs as part of ongoing assessment efforts (100%) to assess changes since a previous GPR (100%). Over half (58%) of 2009 repeat subscribers also report being motivated to conduct further GPRs to explore new areas for improvement.



### Satisfaction with the GPR Process, Report, and Usefulness among Repeat Subscribers

As is shown throughout this section, 2009 assessment respondents commissioning the GPR multiple times are satisfied and find value in the process at similar levels compared to first time users. This finding is a departure from the 2008 report, where repeat GPR users reported higher levels of satisfaction and value in all but one dimension tested. The 2009 levels of satisfaction and value appear to have normalized to 2005 and 2007 levels. It appears that the 2008 survey sample was satisfied at exceptionally high levels.

Exhibit 14 displays the mean satisfaction scores across the dimensions assessed by the GPR Subscriber Assessment survey. All areas are highly rated, and 2009 repeat users score their satisfaction at rates lower than 2008 repeat users but similar to first-time users.

**Exhibit 14**  
**Satisfaction with the GPR Report**


| Area of Satisfaction with the GPR Report   | Mean (7-point scale) |                     |                     | Direction of Change |
|--|----------------------|---------------------|---------------------|---------------------|
|  | 1st Time Users       | Repeat Users (2008) | Repeat Users (2009) |                     |
| The extent to which the GPR report highlighted specific areas in which your foundation was performing well (n=99, n=13, n=12)                      | 5.9                  | 6.5                 | 6.0                 |                     |
| The extent to which the GPR report highlighted specific areas in which your foundation could improve performance (n=100, n=13, n=12)               | 5.8                  | 6.2                 | 5.9                 |                     |
| The extent to which CEP's interpretation of the results was meaningful for guiding reflection on your foundation's performance (n=100, n=13, n=12) | 5.9                  | 6.3                 | 5.5                 |                     |
| The clarity of data, charts, and graphs in the GPR report (n=101, n=13, n=12)  | 5.3                  | 5.7                 | 5.0                 | *                   |
| The usefulness of the GPR report on its own, without CEP staff explanation (n=101, n=13, n=12)   | 4.9                  | 5.5                 | 4.8                 |                     |

\* Significant at  $p \leq .1$

**Exhibit 15**  
**Helpfulness of the GPR Report and Presentations**

| Aspects of the GPR Report and Presentations Received   | Mean (7-point scale) |                     |                     | Direction of Change |
|--|----------------------|---------------------|---------------------|---------------------|
|  | 1st Time Users       | Repeat Users (2008) | Repeat Users (2008) |                     |
| Supplemental and/or additional in-person presentations (n=60, n=8, n=8)                                  | 6.3                  | 6.9                 | 6.3                 |                     |
| In-person CEP presentation (n=89, n=13, n=11)  | 6.5                  | 6.6                 | 6.2                 |                     |
| Comparison to a custom group of funders (n=78, n=7, n=11)  | 5.9                  | 6.3                 | 5.8                 |                     |
| Telephone conversation with CEP staff about preliminary report findings (n=56, n=12, n=11)               | 6.1                  | 6.7                 | 5.6                 | **                  |
| Segmentation of the data by program officer (n=17, n=5, n=5)   | 5.9                  | 5.4                 | 5.6                 |                     |
| Segmentation of the data by program area (n=74, n=9, n=8)  | 5.8                  | 6.2                 | 5.3                 |                     |
| Other segmentation of data (n=56, n=7, n=3)  | 6.1                  | 6.6                 | 5.0                 |                     |
| Provision of sample communications to grantees or other constituents from other funders (n=54, n=5, n=5) | 5.5                  | 6.6                 | 4.8                 |                     |

\*\*Significant at  $p \leq .05$

Exhibit 15  above reveals that 2009 repeat subscriber survey respondents found the GPR report and presentations less helpful than 2008 repeat subscriber survey respondents. In comparison to first-time GPR subscribers, 2009 repeat respondents indicated a lower level of helpfulness, as well. This finding is mitigated, however, by the fact that all but one helpfulness score continues to be above 5 on the 7-pt 'helpfulness' scale.

In open-ended responses, funders indicated that the most recent GPR allowed them to effectively compare their progress with the previous GPR's. Some noted that specific changes that they had made as a result of the first GPR were working well or that they realized they had not made significant changes since the earlier assessment. One funder went as far as to state that "the change-over-time findings are the most valuable aspect of the GPR for us."

## V. Satisfaction with the CEP Team and the GPR Process

### Reflections on CEP Staff


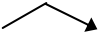
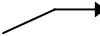
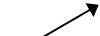
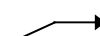
The GPR Subscriber Assessment examined four dimensions of satisfaction with the CEP staff. All funders (100%) report satisfaction with CEP's responsiveness to questions. In addition, 96% report satisfaction with the extent to which CEP delivered on what it promised, the clarity of CEP staff's communication, and the helpfulness of CEP staff's responses to questions. Exhibit 16  compares the 2009 mean scores for these satisfaction dimensions to the 2008 and 2005-2007 data. In each area, CEP staff continues to rate very highly.

Exhibit 16  
Satisfaction With CEP Staff

| Aspects of Satisfaction with CEP Staff   | Mean<br>(7-point scale) |      |      | Direction of<br>Change  |
|--|-------------------------|------|------|---|
|  | 2005 –<br>2007          | 2008 | 2009 |   |
| Responsiveness of CEP staff to questions (n=68, n=37, n=27)                      | 6.6                     | 6.7  | 6.6  |    |
| Extent to which CEP delivered on what it promised for the GPR (n=63, n=32, n=26) | 6.5                     | 6.6  | 6.6  |    |
| Clarity of CEP staff's communications in the process (n=63, n=32, n=26)          | 6.4                     | 6.5  | 6.6  |    |
| Helpfulness of CEP staff's responses to questions (n=69, n=37, n=27)             | 6.2                     | 6.5  | 6.5  |  * |

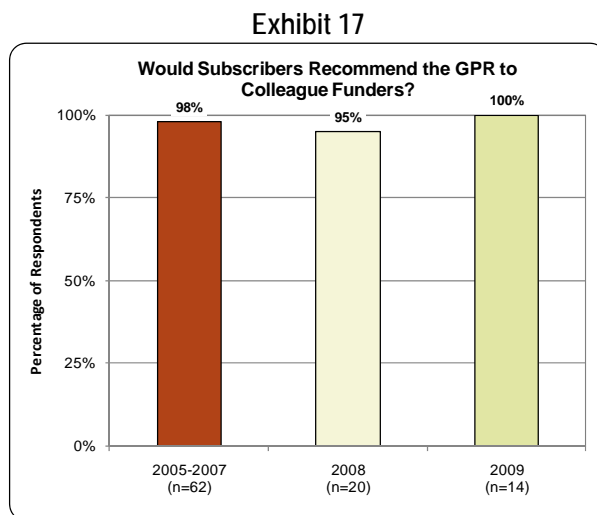
\*Significant at  $p \leq .1$

In an open-ended survey question asking respondents if there was anything beyond what the survey had asked that they would like to add about their GPR experience, the twelve people offering information all spoke to their satisfaction with the GPR and praise for the CEP team. Two examples

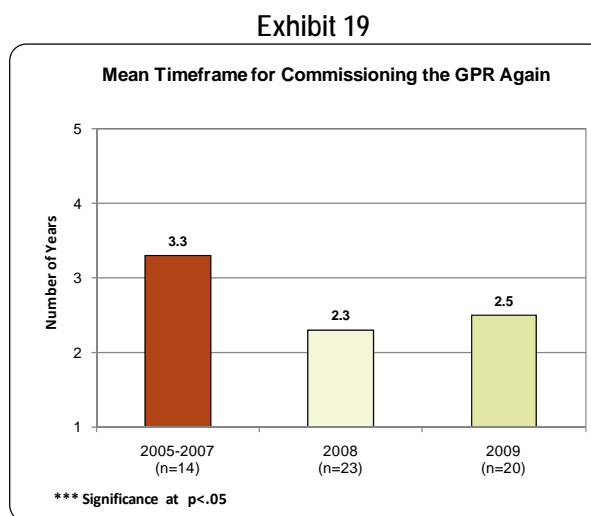
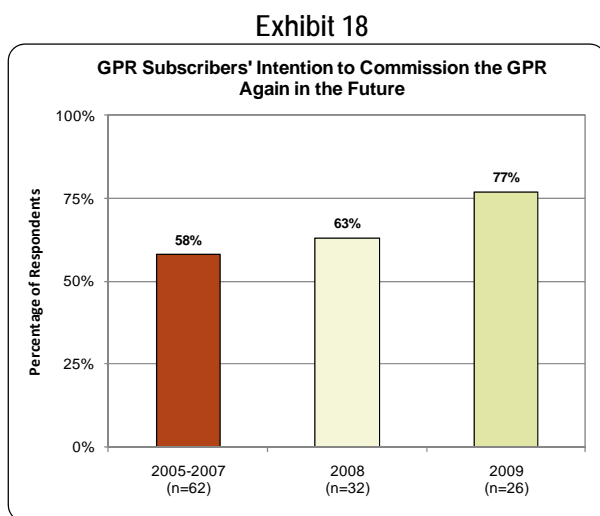
of these comments include: “great product, excellent staff” and, “It’s a great benefit for our foundation, and for the foundation sector as a whole.”

## Satisfaction with the GPR Process

One of the most practically meaningful indicators of satisfaction with a service is whether recipients of that service would recommend it to a colleague; all (100%) 2009 GPR subscribers would recommend the GPR to colleague funders, as shown in Exhibit 17. All (100%) of repeat GPR subscribers also report that they would recommend to colleague funders that they repeat the GPR process multiple times. This high rate of recommending the GPR to colleague funders is consistent with previous GPR Subscriber Assessment findings.



2009 respondents also report an increased intention to repeat the GPR process and to repeat within a timeframe of two and one-half years. See Exhibits 18 and 19. Three-quarters (77%) of the 2009 respondents report an intention to commission the GPR again, and the remaining respondents reported an uncertainty in the likelihood of repeating the GPR. One respondent reported that their organization has no intention of repeating the GPR for reasons that have nothing to do with CEP in any way.



Overall, GPR subscribers are very satisfied with the GPR process, communication with and support from CEP staff, and, as noted above, ascribe a value to the process (from start to final report) that exceeds other funder assessment processes.

## VI. Conclusion

This fourth edition of the GPR Subscriber Assessment shows that CEP's GPR continues to be a tool that funders perceive as highly valuable and contributes to improved funder performance. However, the findings this year also reveal a dip in the satisfaction and utility levels from 2008. In many instances the drop is slight and not statistically significant, but the trend in ratings of the GPR from 2008 to 2009 should prompt CEP to assess if these differences result from an unusually satisfied 2008 sample or from internal or external factors impacting the perception of the 2009 GPR. Overall, the results presented within this report are positive, but the change in results merits review.

GPR subscribers continue to find that CEP staff provide service with the utmost professionalism and quality. Despite the overwhelming consensus among respondents that the excellent CEP staff produced a valuable product that provided actionable information, several respondents provided recommendations for improvement. Overall, critiques centered on the need for clear explanation of the parameters used and better, more narrative interpretation of the data. Other appraisals were that "the charts and graphs were very complex," and "clearer narrative explanation and analysis" should accompany them. Multiple respondents felt the GPR was a "confusing report that did not stand on its own." Funders felt the in-person interpretation of the data was crucial, and capturing findings in narrative form in the report would extend its utility by allowing funders to refer to findings at a later time. Furthermore, one funder would have benefited from "more advice on construction of a comparison set," and another requested a "better explanation of the difference between absolute and relative scoring."

As a result of the GPR, nearly all funders have made changes to some aspect of organizational functioning. Funders also made more significant changes in organizational functioning as a result of the GPR than in previous years. In many cases these changes centered on improving interactions with grantees and making changes to grant requirements. Reliable data enable funders to act and improve. And while data do not guarantee action, without good information, right action is not possible.

What is also becoming a theme over the course of the last three GPR Subscriber Assessments is an increasing identification of the GPR as one tool in multifaceted efforts to assess funder performance. This view of the GPR as but one component of assessing funder effectiveness is directly in line with CEP's view of the GPR. It provides a slice of information into funder performance from the grantees' perspective and begs for more tools to assess other aspects of funder functioning. In this way, the GPR directly speaks to the need for and value of CEP's other assessment tools.

**Appendix:**  
**The GPR Subscriber Assessment Survey Instrument**

## The Grantee Perception Report (GPR) User Assessment Survey

The Center for Effective Philanthropy (CEP) is turning the tables on assessment once again: this time to get feedback from foundations that have commissioned CEP's Grantee Perception Report® (GPR). CEP has engaged an outside research and evaluation consultant, LFA Group, to conduct this survey. Your candid input is essential for helping CEP understand the effectiveness of and how to improve the GPR from your perspective—that of its primary users. **This survey is confidential:** only LFA team members will be able to see your responses, and only aggregate information will be presented to CEP.

**Thank you very much for taking the time to complete this survey. Please respond by September 25<sup>th</sup> 2009.** We estimate it will take you approximately 15-20 minutes. If one of your colleagues could better fill out all or part of this survey, please feel free to pass this survey along to that person.

If you have any questions, please contact Laura Bekes at LFA, [Laura@LFAgroup.com](mailto:Laura@LFAgroup.com) or 415.392.2850 x320.

### General Impressions of the GPR Process

1. How satisfied were you with the GPR experience overall?

|            |   |   |   |   |   |   |           |
|------------|---|---|---|---|---|---|-----------|
| Not at all |   |   |   |   |   |   | Very      |
| Satisfied  |   |   |   |   |   |   | Satisfied |
| 1          | 2 | 3 | 4 | 5 | 6 | 7 |           |

2. How responsive was staff from CEP to questions your foundation had during the GPR process?

|            |   |   |   |   |   |   |            |
|------------|---|---|---|---|---|---|------------|
| Not at all |   |   |   |   |   |   | Very       |
| Responsive |   |   |   |   |   |   | Responsive |
| 1          | 2 | 3 | 4 | 5 | 6 | 7 |            |

3. In general, how helpful were the responses CEP staff provided to questions your foundation had?

|            |   |   |   |   |   |   |         |
|------------|---|---|---|---|---|---|---------|
| Not at all |   |   |   |   |   |   | Very    |
| Helpful    |   |   |   |   |   |   | Helpful |
| 1          | 2 | 3 | 4 | 5 | 6 | 7 |         |

### About the GPR Report and Services

4. How satisfied are you with the following aspects of the GPR report?

| Aspect of the GPR Report   | Not at all |   |   |   |   |   | Very      |
|--|------------|---|---|---|---|---|-----------|
|  | Satisfied  |   |   |   |   |   | Satisfied |
| a. How useful the GPR report was on its own (without CEP staff explanation).   | 1          | 2 | 3 | 4 | 5 | 6 | 7         |
| b. The clarity of data charts and graphs in the GPR report.  | 1          | 2 | 3 | 4 | 5 | 6 | 7         |
| c. The extent to which the CEP's interpretation of the results was meaningful for guiding reflection on your foundation's performance overall. | 1          | 2 | 3 | 4 | 5 | 6 | 7         |

|  |   |   |   |   |   |   |   |
|--|---|---|---|---|---|---|---|
| d. The extent to which the GPR report highlighted specific areas in which your foundation was performing well.       | 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| e. The extent to which the GPR report highlighted specific areas in which your foundation could improve performance. | 1 | 2 | 3 | 4 | 5 | 6 | 7 |

5. Please indicate which of the following services **you received** from CEP. For each service received, please rate its helpfulness in deepening your foundation's ability to use the GPR to reflect on its performance.

| CEP Service  | Check (✓) if Received    | Helpfulness in deepening your foundation's ability<br><i>to use GPR to reflect on its performance</i> |   |   |   |   |   |              |
|--|--------------------------|---|---|---|---|---|---|--------------|
|  |                          | Not at all Helpful  |   |   |   |   |   | Very Helpful |
| a. Telephone conversation with CEP staff about preliminary report findings                     | <input type="checkbox"/> | 1   | 2 | 3 | 4 | 5 | 6 | 7            |
| b. In-person presentation by CEP staff   | <input type="checkbox"/> | 1   | 2 | 3 | 4 | 5 | 6 | 7            |
| c. Supplemental in-person presentation(s) (e.g., to the board)                                 | <input type="checkbox"/> | 1   | 2 | 3 | 4 | 5 | 6 | 7            |
| d. Segmentation of the data by program area  | <input type="checkbox"/> | 1   | 2 | 3 | 4 | 5 | 6 | 7            |
| e. Segmentation of the data by program officer   | <input type="checkbox"/> | 1   | 2 | 3 | 4 | 5 | 6 | 7            |
| f. Other segmentation of the data:<br>_____  | <input type="checkbox"/> | 1   | 2 | 3 | 4 | 5 | 6 | 7            |
| g. Comparison to a custom group of funders   | <input type="checkbox"/> | 1   | 2 | 3 | 4 | 5 | 6 | 7            |
| h. Provision of sample communications to grantees or other constituents from other foundations | <input type="checkbox"/> | 1   | 2 | 3 | 4 | 5 | 6 | 7            |

6. In general, how would you rate the quality of the CEP's in-person presentation?

Poor 1                      2                      3                      4                      5                      6                      Excellent 7

**Creating Change with GPR Results**

7. With which of the following constituencies has your foundation shared the GPR results? *Please check all that apply.*

- Board of Directors/Trustees
- Management Staff
- Program Staff
- Grantees
- Media
- Other foundations
- Other General Public
- Other: \_\_\_\_\_

8. Considering the aspects of your work identified in the table below, please indicate the degree to which the GPR results affected change in your foundation’s decision-making or practices. (Please consider tangible changes in policy or strategy as well as intangible changes in culture, approach, or mindset when responding.)

| Foundation Functions  | <i>To what extent has the GPR affected change in your foundation in these areas?</i> |  |  |   | Evaluation of Previous Change<br><i>The foundation did not make specific changes, but instead wanted to confirm the impact of previous changes.</i> |
|---|--|--|--|---|---|
|   | <b>Too Soon to Tell</b>  | <b>No Change</b><br><i>The foundation did not change in response to GPR results.</i> | <b>Some Change</b><br><i>The changes have been fine-tuning. The results of the GPR allowed the foundation to see something in a new light that encouraged some change in the way we operate.</i> | <b>Significant Change</b><br><i>The foundation made specific, concrete change in response to GPR results.</i> |   |
| a. Communications with grantees (e.g., clarity, methods)  | <input type="checkbox"/>   | <input type="checkbox"/>   | <input type="checkbox"/>   | <input type="checkbox"/>  | <input type="checkbox"/>  |
| b. Attitudes towards work with grantees   | <input type="checkbox"/>   | <input type="checkbox"/>   | <input type="checkbox"/>   | <input type="checkbox"/>  | <input type="checkbox"/>  |
| c. Grantmaking processes (e.g., selection, reporting and evaluation processes)  | <input type="checkbox"/>   | <input type="checkbox"/>   | <input type="checkbox"/>   | <input type="checkbox"/>  | <input type="checkbox"/>  |
| d. Grantmaking patterns (e.g., size and length of grants)   | <input type="checkbox"/>   | <input type="checkbox"/>   | <input type="checkbox"/>   | <input type="checkbox"/>  | <input type="checkbox"/>  |
| e. Foundation strategy (e.g., what it is you’re trying to do, focus)  | <input type="checkbox"/>   | <input type="checkbox"/>   | <input type="checkbox"/>   | <input type="checkbox"/>  | <input type="checkbox"/>  |
| f. Provision of assistance to grantees beyond “the check” (e.g., management assistance, field-related assistance, assistance securing funding from other sources) | <input type="checkbox"/>   | <input type="checkbox"/>   | <input type="checkbox"/>   | <input type="checkbox"/>  | <input type="checkbox"/>  |
| g. Staffing levels  | <input type="checkbox"/>   | <input type="checkbox"/>   | <input type="checkbox"/>   | <input type="checkbox"/>  | <input type="checkbox"/>  |
| h. Allocation of resources for a particular program area  | <input type="checkbox"/>   | <input type="checkbox"/>   | <input type="checkbox"/>   | <input type="checkbox"/>  | <input type="checkbox"/>  |
| i. Addressing performance of a particular program officer / staff member  | <input type="checkbox"/>   | <input type="checkbox"/>   | <input type="checkbox"/>   | <input type="checkbox"/>  | <input type="checkbox"/>  |
| j. Addressing performance of or approach to a particular program area   | <input type="checkbox"/>   | <input type="checkbox"/>   | <input type="checkbox"/>   | <input type="checkbox"/>  | <input type="checkbox"/>  |
| k. Performance reviews/ evaluations (e.g. assessment of performance of staff or the CEO)  | <input type="checkbox"/>   | <input type="checkbox"/>   | <input type="checkbox"/>   | <input type="checkbox"/>  | <input type="checkbox"/>  |
| l. Other: (Please specify)  | <input type="checkbox"/>   | <input type="checkbox"/>   | <input type="checkbox"/>   | <input type="checkbox"/>  | <input type="checkbox"/>  |

9. To help us better understand the changes made within your foundation as a result of the GPR and the magnitude of those changes, please briefly describe the one or two most significant changes the GPR has informed.

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15. Please provide your level of satisfaction with the following aspects of the GPR experience overall.

| Aspect of the GPR Experience Overall   | Not at all Satisfied |   |   |   |   |   | Very Satisfied |
|--|----------------------|---|---|---|---|---|----------------|
| a. Clarity of CEP staff's communications in the process                              | 1                    | 2 | 3 | 4 | 5 | 6 | 7              |
| b. The extent to which CEP delivered on what it promised for the GPR                 | 1                    | 2 | 3 | 4 | 5 | 6 | 7              |
| c. The value of the GPR in providing your foundation with information for reflection | 1                    | 2 | 3 | 4 | 5 | 6 | 7              |

16. How did your foundation first hear about the GPR?

- From direct contact with a CEP staff member
- From a CEP mailing
- From the CEP's electronic newsletter, "Effective Matters"
- From other materials distributed by CEP
- At a presentation/speaking engagement by CEP
- At a CEP conference
- From a peer or colleague (word of mouth)
- From a newspaper, journal, or other publication
- From a funder network (such as GEO)
- Other: \_\_\_\_\_

17. Does your foundation intend to commission the GPR again in the future?

- Yes
- No
- Don't know

*If Yes, within what approximate timeframe?*

- 1 year
- 2 years
- 3 years
- 4 years
- 5 or more years

*If No, please explain:* \_\_\_\_\_

18. Would you recommend the GPR to a colleague foundation?

- Yes
- No

Please explain: \_\_\_\_\_

19. Who was your primary CEP contact during your most recent GPR process?

- Stacy Abner
- Kevin Bolduc
- Phil Buchanan
- John Davidson
- Romero Hayman
- Lisa Jackson
- Travis Manzione
- Romero Hayman
- Sindhu Srinath
- Other (*please specify*): \_\_\_\_\_

20. What other GPR services, analysis, or presentations could CEP provide that would be useful to you?

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21. What could CEP improve about the GPR process and/or report?

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## About You

22. Which category best describes your position in the foundation?

- CEO/Executive Director
- Vice President for Programs
- Director of Research/Evaluation
- Program Officer
- Other: Please specify \_\_\_\_\_

23. How long have you been in your current position? *Please check one.*

- Less than a year
- 1-3 years
- 4-6 years
- 7-10 years
- More than 10 years

24. Is there anything else you would like to tell us about the GPR process, and your experience?

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***Thank you for your time and input!***