



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

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I. Introduction and Methods

Background and Context on the GPR

In response to the challenge of finding useful measures of a foundation's effectiveness and growing interest among foundation leaders, The Center for Effective Philanthropy (CEP) developed the Grantee Perception Report (GPR) as one input into measurement of foundation effectiveness.¹ First launched in the Spring of 2003, the GPR is an assessment process involving the administration of a survey to grantees of foundations. The GPR instrument asks grantees to rate the foundation's performance and effectiveness in the following areas:

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

The GPR offers unique value to foundations not only by providing a summary of results for the individual foundation, but also by indicating how results for the individual foundation stack up relative to a comparison group of other foundations that have commissioned the GPR. This comparative assessment allows a foundation to understand its grantee-rated performance against benchmarks established by the comparison group of other GPR-participating foundations.

Overview and Purpose of this Assessment

This is the third report of findings from the ongoing GPR Subscriber Assessment study conducted by the research and evaluation firm LaFrance Associates, LLC (LFA). The primary areas of focus for LFA's assessment of the GPR include:

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

¹ 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.

Subscriber Assessment Methods

LFA designed an on-line assessment survey based on the study purposes.² With data from the two previous GPR Subscriber Assessments (conducted in July 2005 and May 2007), LFA worked with CEP to modify the survey instrument slightly to answer new questions raised and to

- **106 of 164** foundations (65%) responded to the GPR Subscriber Assessment survey.

collect more in-depth data related to change foundations made based on GPR results. Over the course of the three GPR Subscriber Assessments, CEP has provided LFA with the list of primary contacts at each of the 164 foundations 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 foundation receives its GPR results to allow time for foundations to implement GPR-informed change. In total, 106 of these 164 foundations completed the on-line survey, representing a respectable 65% response rate.

New to this third GPR Subscriber Assessment is the creation of a slightly modified version of the survey for administration to foundations participating in multiple GPRs to gather data on the effects of repeat GPR usage. This new survey mirrors closely the original survey, adding additional questions to understand the benefits of ongoing GPR usage as well as the differences, if any, in the perception of the GPR's value held by repeat subscribers.

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 foundation asset size; foundation type; and GPR "round" (i.e., when the foundation commissioned the GPR). LFA also conducted content analysis to identify themes arising from open-ended questions included on the assessment survey.

Study Strengths

The primary strength of this assessment is the strong rate of response. Moreover, in nearly every case, LFA was able to get feedback from the foundation staff person who had been most directly involved in the GPR process with CEP, providing access to the most direct source of feedback for CEP on the GPR. 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. Additionally, the ongoing use of GPR Subscriber Assessment survey instrument provides valuable context for interpreting change findings and improvements in the GPR process.

Limitations

This assessment also has some limitations. First, the parameters of the assessment are restricted to areas of satisfaction with and utility of the GPR. Second, the survey relies on individual self-reports rather than observations, which may introduce positive response bias particularly with respect to

² Please refer to the Appendix of this report for a copy of the 2008 GPR Assessment Survey.

questions about areas of change in which foundations have engaged. These results should be interpreted with this caution in mind.

Characteristics of GPR Assessment Survey Respondents

LFA distributed the GPR satisfaction survey to each foundation’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 foundation as a result of the GPR, and their perception of the GPR’s value. This survey distribution model is the same model for each of the three LFA-conducted assessments. It is interesting to note the change in the distribution of job positions held by the primary contacts between the 2008 dataset and the historical dataset, as shown in Exhibit 1 ↻. There is a

sizable increase in the percentage of Program Officers and Directors of Research/Evaluation. At the same time, there are fewer CEOs and Vice Presidents for Programs acting as liaison with CEP for the GPR process. This is, in part, explained by a new pool of respondents to the 2008 survey – foundations using the GPR two or more times. These foundations are more likely to have program officers or directors of research/evaluation complete the survey.

These primary contacts have been in their current positions for a broad range of years, with just over half (54%) in their current jobs for four or more years. However, this marks a sizable decrease in the percentage of contacts in their current positions four or more years when compared to the historical dataset. As displayed in Exhibit 2 ↻, 78% of 2005 and 2007 primary contacts had been in their positions for four or more years.

Exhibit 1
Respondent’s Role/Position in Organization**

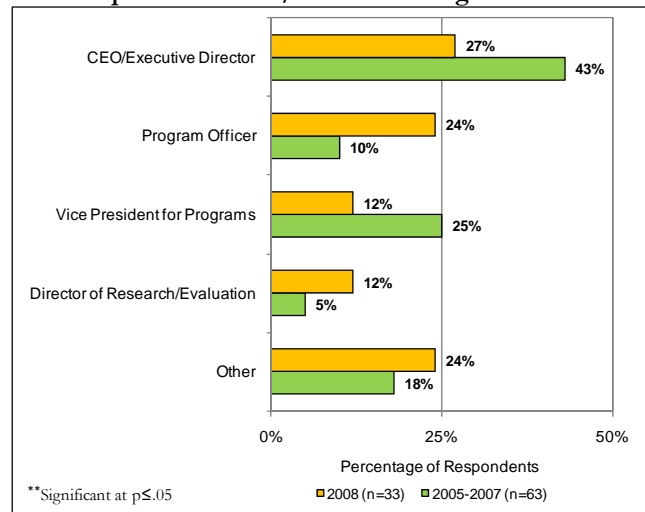
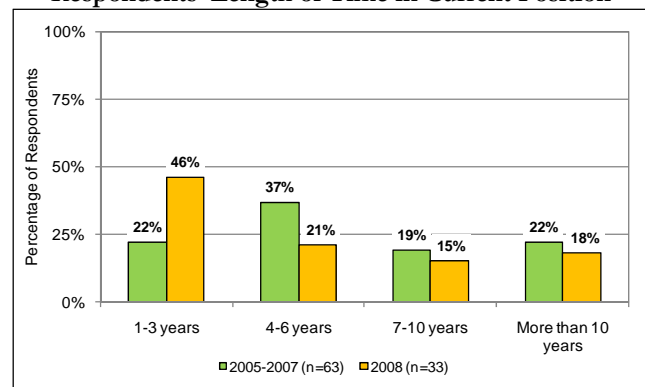


Exhibit 2
Respondents’ Length of Time in Current Position



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

Findings in this report look at data from this most recent GPR Subscriber Assessment in comparison to historical GPR Subscriber Assessment data collected by LFA in 2005 and 2007. This presentation format serves to highlight key differences in the characteristics of survey respondents (as shown above) as well as draw attention to the many positive changes in satisfaction and usefulness scores between the 2008 assessment and the previous two assessments. For the purposes of this presentation format, LFA combined 2005 and 2007 data. Statistically significant findings between the two groups are noted throughout the report.

Additionally, this assessment report offers, for the first time, the perspective of foundations that have commissioned the GPR two or more times, as gathered through the Repeat GPR Subscriber Assessment survey.³ These data provide insight into the unique value of conducting the GPR in cycles over time. Statistically significant findings are present when comparing first-time GPR subscribers with repeat subscribers; these findings are noted throughout this report.

It should also be noted that LFA conducted analysis to look at the effects of repeat GPR users in raising the mean scores of 2008 data overall and concluded that there are two stories to tell in this report: 1. the differences between all 2008 respondents and the historical dataset; and 2. the differences between repeat GPR users and all first-time GPR users.

³ Repeat GPR subscribers were interviewed for the 2007 report, but did not provide survey data. This is the first report containing quantitative data related to repeat GPR subscribers.

II. Key GPR Subscriber Assessment Findings

Why Foundations Choose the GPR

Primarily, foundations undertake the GPR in order to evaluate their effectiveness and make improvements in their grantmaking. Foundations desire an independent assessment of their grantmaking to assist them in strategic planning and ultimately enhance their performance. Many foundations choose the GPR in order to establish a benchmark or baseline by which to measure their growth and improvements. In addition, foundations want to see how they stack up against other foundations, providing them with an important comparative perspective on their performance.

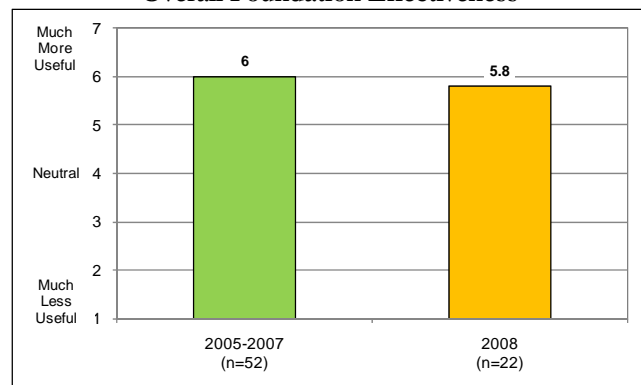
Foundations are also motivated to participate in the GPR to help them understand their grantees' experience more clearly. Foundations are interested in both feedback from grantees as well as a better understanding of how they are viewed by grantees. As one foundation explained, participating in the GPR would allow them to gain insight on programs and processes as viewed by grantees. The ability to see through the lens of the grantee creates an opportunity for reflection and action for foundations.

How the GPR Compares to Other Measures of Foundation Effectiveness

Nearly nine out of ten (86%) GPR subscribing foundations identify the GPR as more useful than other processes undertaken to assess overall foundation effectiveness.⁴ Exhibit 3 below shows that the means usefulness scores of the GPR are mostly unchanged in 2008 compared to the two previous GPR assessments, and remain near the high-end of the 7-pt Likert “usefulness” scale.

In open-ended comments, respondents remark that CEP's role as an external evaluator of grantee perceptions and the GPR's ability to provide comparative data are what make it stand out relative to other processes for measuring overall foundation effectiveness. One GPR subscriber stated that “while [the GPR] confirmed what we expected, the ability to benchmark our performance with that of other foundations was very valuable for our board and staff.” This idea of collecting anonymous, comparative data, combined with the positive reputation of CEP as an organization specializing solely in improving foundation effectiveness, results in GPR subscribers positively assessing the GPR process as considerably more useful than other evaluation processes undertaken in the past.

Exhibit 3
GPR Usefulness Relative to Other Processes for Measuring Overall Foundation Effectiveness



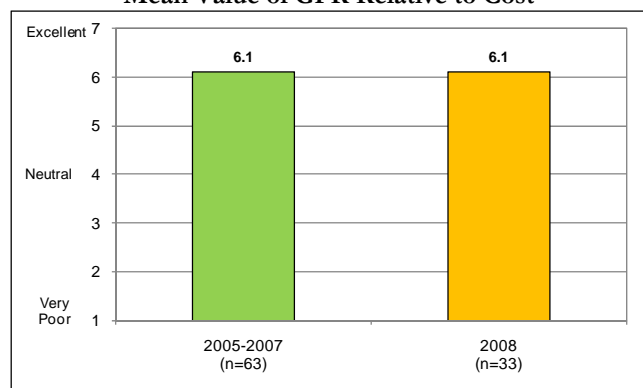
⁴ **Please note:** LFA assessed satisfaction and/or usefulness on a 7-point scale, with 1 indicating ‘not at all satisfied/useful and 7 indicating ‘very satisfied/useful.’ In interpreting results, LFA considered rankings of ≥ 5 to indicate “satisfied” or “useful.”

However, unlike in previous GPR subscriber assessments, more 2008 respondents indicate that the GPR is just one component in a system of assessing foundation performance. One respondent describes it this way, “We break effectiveness into two parts, as follows: substantive effectiveness and managerial effectiveness. We believe the GPR plays a minor role in understanding effectiveness at a substantive level and plays a much larger part in describing how grantees feel about their contact with the foundation from a managerial point of view.” Another survey respondent stated that the GPR is “an important piece of a multi-faceted foundation effectiveness approach, but not necessarily stronger than other elements.” These are sentiments that CEP shares and speak to an emerging agreement among CEP users that measuring foundation performance requires examination into many aspects of foundation functioning.

GPR subscribers also continue to consider the GPR very valuable relative to its cost. As shown in Exhibit 4, the mean score for the GPR’s value relative to its cost is 6.1 and unchanged from previous assessments. Over three quarters (79%) of survey respondents rate the GPR a six or higher on the 7-point scale.

Overall, survey respondents indicate that the GPR is good value, stating in open-ended comments that the GPR “was a great value” and “well worth the investment.” Given the current national economic outlook, though, one survey respondent tempered their positive perspective on the cost of the GPR this way: “It was worth the money, but we were more flush last year. If we were scheduled to do it in 2009 or 2010, I’m not sure we would be able to... those expenses are vulnerable when the market and economy are so poor.”

Exhibit 4
Mean Value of GPR Relative to Cost

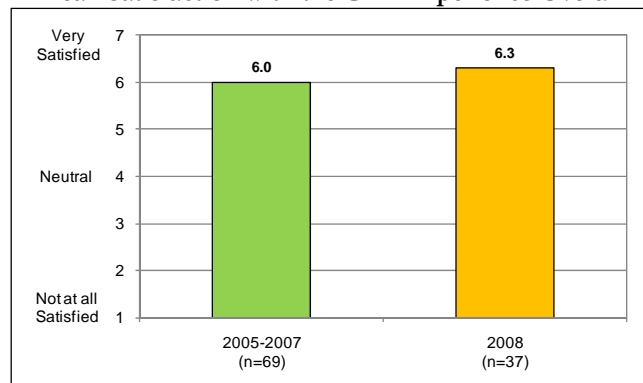


Satisfaction with the GPR Process, Report, and Usefulness

Foundations commissioning the GPR continue to be overwhelmingly satisfied with the GPR experience. All but one 2008 respondent (97%) rated their overall GPR experience positively. Overall, 2008 respondents report a slightly higher level of overall satisfaction than previous year’s assessments. See Exhibit 5 ↻.

As Exhibit 6 ↻ shows, foundations also rate highly their satisfaction with the GPR report. In fact, across the dimensions of satisfaction related to the GPR report tested by the LFA

Exhibit 5
Mean Satisfaction with the GPR Experience Overall



evaluation team, the 2008 data show increases in satisfaction in each area, which in many cases are statistically significant.

Exhibit 6
Satisfaction with the GPR Report

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

*Significant at $p \leq .1$

Foundations rated the usefulness of the GPR report on its own, without the benefit of CEP interpretation, the lowest of the five dimensions shown in Exhibit 6 above. Yet, this dimension of satisfaction rose above a mean score of 5 for the first time since the inception of the GPR Subscriber Assessment, continuing the theme of increased satisfaction among the 2008 respondents compared to the 2005 and 2007 respondents.

Further, analysis of the 2008 data reveals that foundations continue to rely on and highly value the in-person presentation by CEP staff to fully understanding the results included in its GPR report. Foundations rated the in-person presentations the most helpful of all services and deliverables provided by CEP, in a tie with the custom segmentation of data. Exhibit 7 offers more evidence of GPR subscribers' positive experience. Seven out of eight areas received higher usefulness scores from subscribers in 2008 than in the 2005-2007 GPR assessment dataset.

Exhibit 7
Helpfulness of the GPR Report and Presentations

Aspects of the GPR Report and Presentations Received	Mean (7-point scale)		Direction of Change
	2005-2007	2008	
In-person CEP presentation (n=60, n=32)	6.4	6.5	+
Other segmentation of data (n=38, n=21)	6.0	6.5	+*
Supplemental and/or additional in-person presentations (n=35, n=22)	6.2	6.4	+
Segmentation of the data by program area (n=50, n=24)	5.6	6.3	+**
Telephone conversation with CEP staff about preliminary report findings (n=22, n=33)	6.0	6.3	+
Comparison to a custom group of foundations (n=52, n=21)	6.0	6.2	+
Provision of sample communications to grantees or other constituents from other foundations (n=32, n=18)	5.6	6.0	+
Segmentation of the data by program officer (n=9, n=9)	5.9	5.7	-

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

Ninety-seven percent of 2008 respondents indicate that in-person presentations are helpful, with 66% reporting the presentations are “very helpful.”⁵ GPR subscribers also rate the initial phone conversation with CEP to discuss preliminary GPR findings as helpful. Respondents found this a value-added component of the process, with 100% reporting it is a helpful first step in receiving data on their foundations GPR results.

Foundation responses related to GPR data analysis reveal that 100% of respondents found CEP’s custom segmentation of data to be helpful, with 62% reporting that the customized data presentations are “very helpful.”

⁵ 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 ≥ 5 to indicate “helpful.”

III. The GPR’s Influence on Organizational Practices

GPR-Informed Change in Foundations


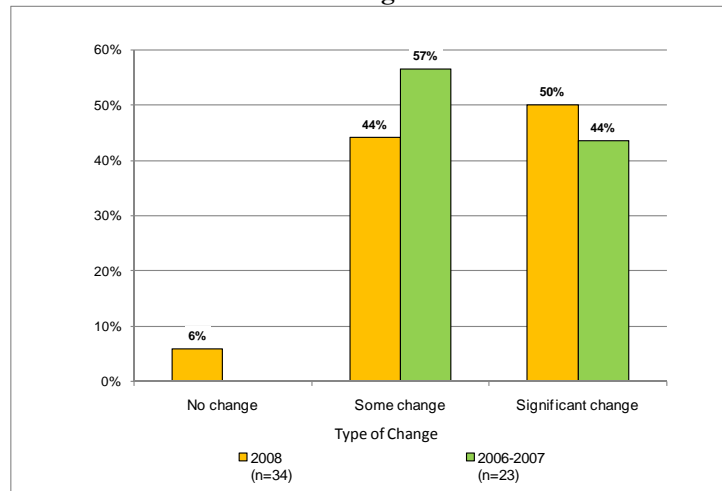

The GPR provides foundations with a reliable methodology for gathering anonymous, candid grantee assessments of foundation practices and benchmarks those results against a comparison group. But do foundations’ GPR findings lead to change? The extent to which foundations make changes as a result of their GPR findings is the greatest indicator of the tool’s success. And, by this measure, the GPR is effective: 94% of 2008 respondents report that the GPR resulted in some change in their organizations (See Exhibit 8 ).⁶

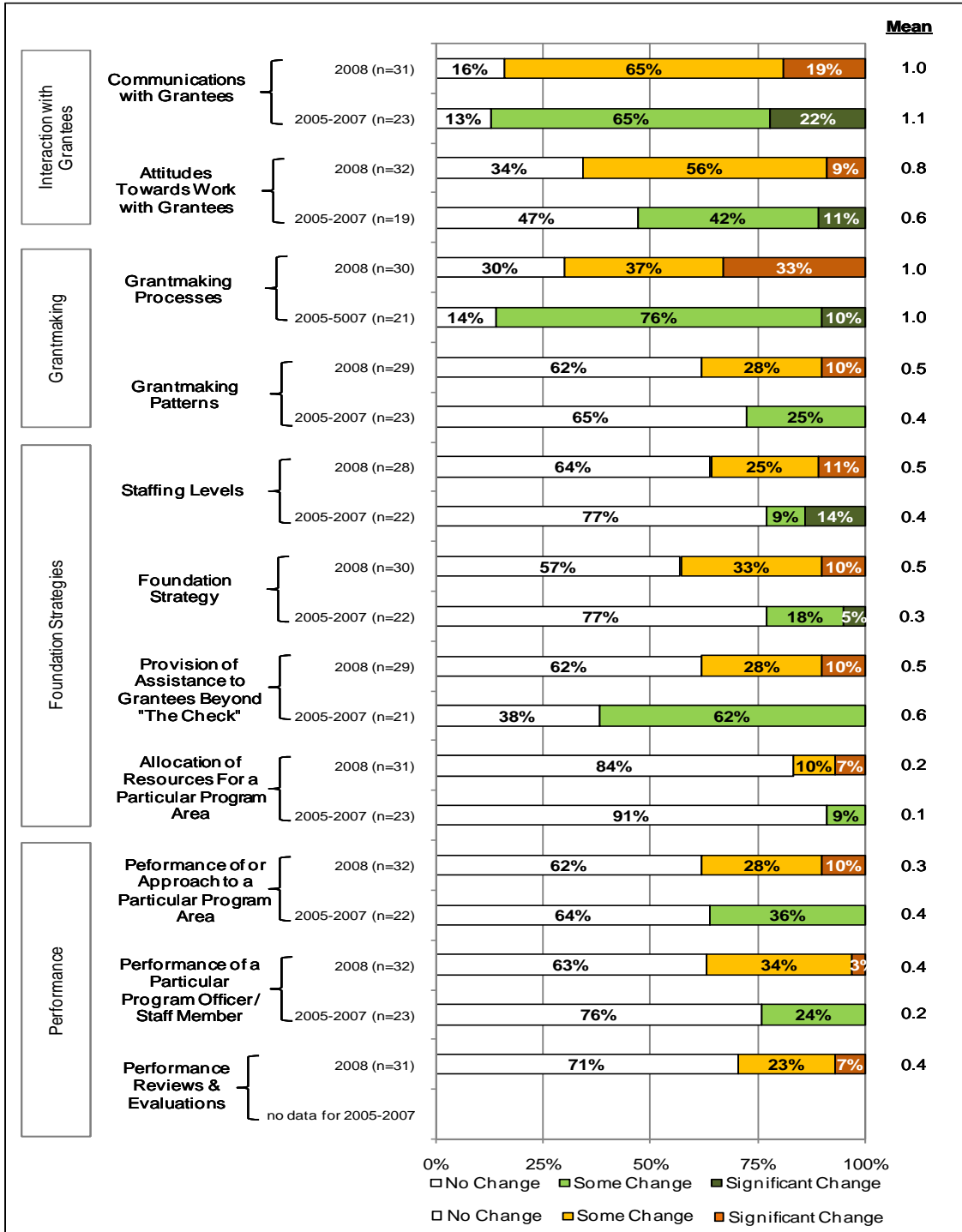
Exhibit 8
Proportion of Foundations Reporting Change in At Least One Area of Foundation Functioning as a Result of the GPR



In 2008, for the first time, two respondents reported their foundations made no change as a result of the GPR. This finding is mitigated, however, by the fact that the intensity of change made by foundations in 2008 increased in several areas when compared to the 2005 and 2007 data. Exhibit 9  shows the degree to which the GPR affected change in specific areas of foundation functioning.

⁶ 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
Extent of Change Informed by the GPR in Specific Areas of Foundation Functioning:
2005-2007 Subscribers vs. 2008 Subscribers



The GPR's most significant spheres of influence continue to be in the areas of grantee engagement and grantmaking processes. Three years of GPR Subscriber Assessment data demonstrate that the GPR speaks most effectively to foundations about their communication practices as well as the impact of foundation grantmaking requirements on grant-seeking organizations. Overall, the GPR most directly allows foundations to gather grantee perceptions about interactions with the foundation and, not surprisingly, leads to changes in how foundations 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 on "the one or two most significant changes the GPR informed."

Grantee Engagement

Eighty-four percent 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 2008 data show that the GPR results push foundations to develop improved communication strategies with grantees to address power dynamics between foundations and grantees and to clarify the messages foundations aim to communicate with grant seeking organizations. Some examples of improvements that foundations made are:

- Improved foundation communication materials, including new in-person sessions with potential and existing grantees; and
- Changes in how foundations seek reports from grantees.

Changes in Grantee Engagement

- ✓ *"We now understand the importance of clear and timely communication with our grantees. Our foundation has made a commitment to publish more information related to guidelines and focus areas in order to help provide more clarity to our grantees."*
- ✓ *"Creation of more thorough and reasonable grantmaking guidelines. More clarity in communicating our process and staffing model to grant applicants."*

Grantmaking Processes

The majority of GPR subscribing foundations (70%) 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, as well as the reporting requirements established for grantees. The following are examples of the most common changes foundations are making to their grantmaking processes as a result of the GPR:

- Shorter applications for grants below a certain dollar amount;
- Creation of more thorough grantmaking guidelines; and
- A more favorable view of multi-year grants.

Changes in Grantee Processes

- ✓ *"Reinforced our intention to dramatically revamp the grantmaking process and the nature of our relationships with grant applicants."*
- ✓ *"Right sizing grants and types of grants"*

Additional GPR-Inspired Changes

The fact the 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 foundation functioning. In some cases, it illuminates other areas of foundation functioning in need of attention and change. In other instances the GPR plants a seed for further foundation assessment in areas related to strategy or staff performance.

For one foundation the GPR highlighted a need to “increase staff and professionalize staff.” Another foundation stated that GPR results inspired “more specialization by program area among our program officers.” Other foundations 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 Foundations

For foundations, 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.

For one foundation the GPR offered a realization that the organization was relying too much on its historical reputation – “We had a feeling that we were ‘trading on our legacy’ and the GPR confirmed this. We had taken our grantees for granted.” As a result of the GPR this foundation reported making significant changes in organizational attitude toward working with grantees, grantmaking processes, and grantmaking patterns.

The GPR can raise awareness about the importance of foundation services.

Not surprisingly, many foundations accurately predicted many aspects of their GPR results whether the findings were positive or negative. The GPR offered concrete evidence to support internal assumptions. Still, foundations experienced new insights as a result of the GPR. “We hypothesized that our model of highly engaged grantmaking and support services made sense to and was valued by grantees. We were a bit surprised that the non-financial assistance seemed highly valued regardless of the size of the financial grant.” This foundation was pleased with the expected outcome (that grantees positively viewed the grantmaking strategies) and surprised by the new data indicating that assistance beyond the check is so highly valued among its grantees.

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. According to one foundation, “We knew we were going to dramatically shift our grantmaking prior to the GPR, but the survey just helped us confirm our new directions.” In this instance the GPR results supported a foundation decision and resulted in faster movement to enact the proposed changes.

The GPR can provide positive feedback to foundation staff.


One important function of the GPR is its ability to reinforce the good work of many foundations. Looked at this way, several foundation noted in open-ended comments that the GPR validated staff's positive personal impressions of their foundations operations. One foundation said simply, "We knew that we're doing well in terms of overall service and the report/research confirmed that."

Reliable data enable foundations to act and improve. And while data do not guarantee action, without good information, right action is not possible. The examples above show that the GPR provides foundations with information that they are able to act on in a variety of different areas of foundation effectiveness.

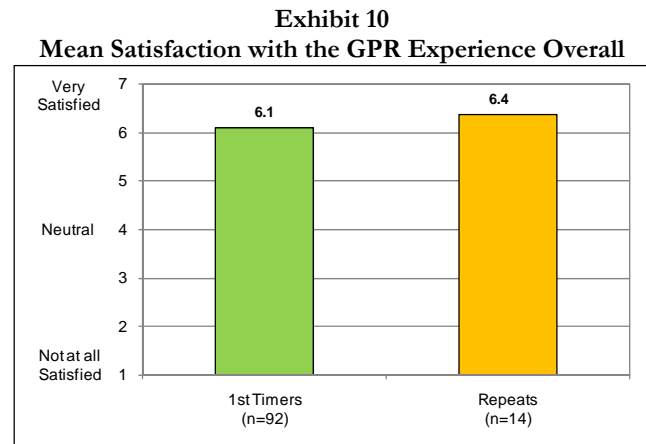
IV. The Value of Commissioning the GPR Multiple Times

This GPR Subscriber Assessment Report marks the first time LFA gathered quantitative data from foundation 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 2008 in comparison to repeat subscribers.

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

Exhibit 10 , showing a higher overall level of satisfaction with the GPR experience among repeat subscribers than with first-time users of the GPR, typifies the repeat user's experience.

The repeat users are primarily (84%) motivated to conduct multiple GPRs as part of ongoing assessment efforts. Two-thirds of repeat subscribers (64%) also report being motivated to conduct further GPRs to assess changes since a previous GPR.



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

As is shown throughout this section, foundations commissioning the GPR multiple times are more satisfied and find greater value in the process as compared to first time users. LFA looked at the responses from the eight foundations that completed a first-time survey and a repeat survey to understand if this positive difference is the result of repeat users being highly satisfied first-time GPR users or the experience of increased satisfaction. This level of analysis showed positive change in repeat users responses to overall satisfaction with the GPR experience as well as other dimensions tested. Seven out of the eight foundations completing both responses scored their repeat experience higher than their first-time experience with the GPR. This overall finding – greater exposure to the GPR increases its usefulness and increases subscribers' satisfaction – is very positive.


Exhibit 11 , displays the higher mean satisfaction scores across the dimensions assessed by the GPR Subscriber Assessment survey. All areas are highly rated, and repeat users score their satisfaction higher than that of first-time GPR users. On average, repeat user scores are about half a point higher than first-time user scores.

Exhibit 11
Satisfaction with the GPR Report

Area of Satisfaction with the GPR Report	Mean (7-point scale)		Direction of Change
	1st Time Users	Repeat Users	
The extent to which CEP's interpretation of the results was meaningful for guiding reflection on foundation's performance overall (n=86, n=13)	5.8	6.3	+
The extent to which the GPR highlighted specific areas in which foundations are performing well (n=85, n=13)	5.9	6.3	+
The extent to which the GPR highlighted specific areas in which your foundation could improve performance (n=86, n=13)	5.8	6.2	+**
The clarity of data charts and graphs in the GPR report (n=87, n=13)	5.3	5.7	+
The usefulness of the GPR report on its own, without CEP staff explanation (n=87, n=13)	4.9	5.5	+

***Significant at p ≤ .05*

Repeat GPR subscribers report higher satisfaction with the “extent to which the CEP’s interpretation of the results is meaningful for guiding reflection on foundations’ overall performance” (see above). This finding demonstrates that while both first- time users and repeat users of the GPR find results meaningful, repeat subscribers find results from their most recent GPRs more useful in guiding reflection on performance than first-time users. This finding is also linked to the increased value repeat subscribers find in being able to make comparisons to their foundations’ previous GPR results, as revealed in open-ended comments. In the words of one repeat GPR subscriber, “because we were able to compare directly to ourselves three years ago, the results felt more relevant.” Another respondent added that the ability to compare data against a cohort group as well as against earlier GPR results “added a context and richness to the data.”

Repeat GPR subscribers are also more comfortable than first-time users with the GPR report on its own, without the CEP explanation. Having been through the GPR process at least once before provides a level of comfort with the GPR not available to first-time users.


Further evidence of repeat subscribers’ higher degree of satisfaction as compared to first-time users is displayed below in Exhibit 12 . Repeat subscribers report that the GPR report and presentations are helpful at higher levels than first-time users in all the dimensions tested, except one. Many of these mean scores are at the very upper end of the 7-pt ‘helpfulness’ scale, signifying that CEP is meeting the highest expectations of its clients with regard to the GPR.

Exhibit 12
Helpfulness of the GPR Report and Presentations

Aspects of the GPR Report and Presentations Received	Mean (7-point scale)		Direction of Change
	1 st Time Users	Repeat Users	
Supplemental and/or additional in-person presentations (n=49, n=8)	6.2	6.9	+***
Telephone conversation with CEP staff about preliminary report findings (n=43, n=12)	6.1	6.7	+**
In-person CEP presentation (n=79, n=13)	6.4	6.6	+
Other segmentation of data (n=52, n=7)	6.1	6.6	+
Provision of sample communications to grantees or other constituents from other foundations (n=45, n=5)	5.6	6.6	+**
Comparison to a custom group of foundations (n=66, n=7)	6.0	6.3	+
Segmentation of the data by program area (n=65, n=9)	5.8	6.2	+
Segmentation of the data by program officer (n=13, n=5)	5.9	5.4	-

***Significant at p ≤ .05 ***Significant at p ≤ .01*

Across the board repeat subscribers satisfaction and helpfulness scores are higher than those of first-time users.

IV. 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. In each area, CEP staff rate very highly.

All foundations (100%) report satisfaction with CEP’s responsiveness to questions and that CEP’s answers to questions were helpful. In addition, 97% report satisfaction with the clarity of their communication during the process and 90% report that CEP staff delivered on what it promised for the GPR. Exhibit 13 ↻ compares the 2008 mean scores for these satisfaction dimensions to the 2005 and 2007 data. It reveals increases in the mean score for each of the four dimensions.

Exhibit 13
Satisfaction With CEP Staff

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

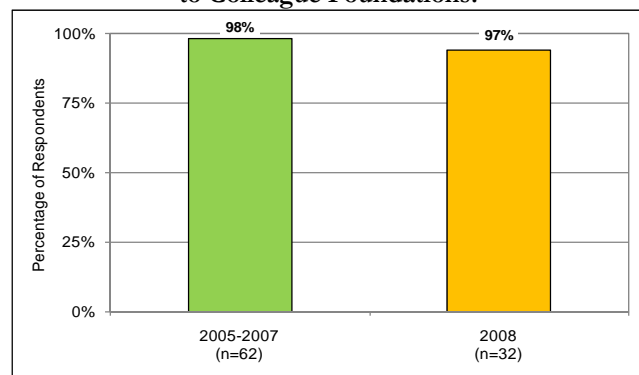
** Significant at $p \leq .05$

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 nine people offering information all spoke to their satisfaction with the GPR and praise for the CEP team. Two examples of these comments include: “I appreciated the opportunity to work with CEP. Their materials are solid and clear and the staff was great to work with” and, “We received extremely high quality and energetic support from CEP for all aspects of the GPR.”

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; almost all (97%) 2008 GPR subscribers would recommend the GPR to colleague foundations, as shown in Exhibit 14 ↻. This high rate of recommending the GPR to colleague foundations is consistent with previous GPR Subscriber Assessment findings. In both datasets, only one GPR user indicated an unwillingness to recommend the GPR

Exhibit 14
Would Subscribers Recommend the GPR to Colleague Foundations?



An interesting change in the 2008 data is the fact that there is an increase in the proportion of GPR subscribers reporting a commitment to

repeating the GPR process and a shortening of the timeframe in which their foundation is likely to do so. See Exhibits 15 and 16 ↻. Nearly two-thirds of the 2008 respondents report an intention to commission the GPR again, and the remaining respondents reported an uncertainty in the likelihood of repeating the GPR. No respondent reported that their foundation has no intention of repeating the GPR. Additionally, the mean timeframe within which foundation intend to conduct the GPR again shrank by one year, from 3.3 years between GPRs in the 2005-2007 data to 2.3 years between GPRs in 2008.

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 foundation assessment processes.

Exhibit 15
GPR Subscribers' Intention to Commission the GPR Again in the Future

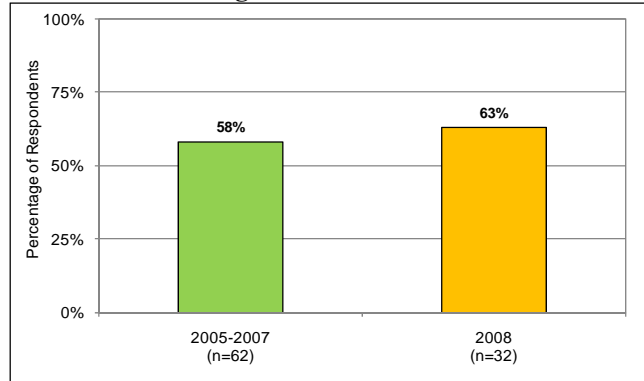
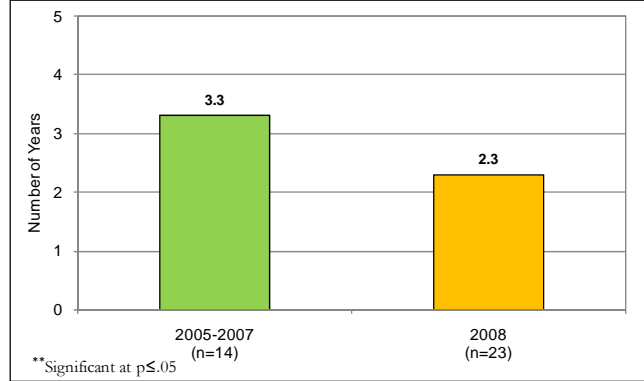


Exhibit 16
Mean Timeframe for Commissioning the GPR Again**



VI. Conclusion

The first GPR Subscriber Assessment Report in 2005 set a high baseline for CEP. This trend continued in 2007 as the second GPR Subscriber Assessment Report conducted by LFA revealed that CEP maintained the high levels of satisfaction and reported utility of the GPR among foundations commissioning the GPR. Finally, this third edition of the report shows that CEP improved upon the already high levels among first-time users of the GPR and among repeat GPR subscribers. GPR subscribers also continue to find that CEP staff provides service with the utmost professionalism and quality.

As a result of the GPR nearly all foundations have made changes to some aspect of foundation functioning. In many cases these changes centered on improving interactions with grantees and making changes to grant requirements. This is not to say that the GPR does not result in changes at the program or strategy level within subscribing foundations. The data clearly indicate that the GPR does impact some foundations at this level. What is also becoming a theme over the course of the last two GPR Subscriber Assessments is an increasing identification of the GPR as one tool in multifaceted efforts to assess foundation performance.

This view of the GPR as but one component of assessing foundation effectiveness is directly in line with CEP's view of the GPR. It provides a slice of information into foundation performance from the grantees perspective and begs for more tools to assess other aspects of foundation 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, LaFrance Associates LLC (LFA), 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 October 7th 2008. 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 or 415.392.2850 x320.

General Impressions of the GPR Process

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

Not at all Satisfied							Very 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 Responsive							Very 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 Helpful							Very 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 Satisfied							Very 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	Not at all Helpful	Helpfulness in deepening your foundation's ability <i>to use GPR to reflect on its performance</i>					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 <i>area</i>	<input type="checkbox"/>	1	2	3	4	5	6	7
e. Segmentation of the data by program <i>officer</i>	<input type="checkbox"/>	1	2	3	4	5	6	7
f. Other segmentation of the data: _____	<input type="checkbox"/>	1	2	3	4	5	6	7
g. Comparison to a custom group of foundations	<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 have CEP products and services affected change in your foundation in these areas?</i>			
	Too Soon to Tell	No Change <i>The foundation did not change in response to GPR results.</i>	Some Change <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>	Significant Change <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"/>
b. Attitudes towards work with grantees	<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"/>
d. Grantmaking patterns (e.g., size and length of grants)	<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"/>
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"/>
g. Staffing levels	<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"/>

Foundation Functions	<i>To what extent have CEP products and services affected change in your foundation in these areas?</i>			
	Too Soon to Tell	No Change <i>The foundation did not change in response to GPR results.</i>	Some Change <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>	Significant Change <i>The foundation made specific, concrete change in response to GPR results.</i>
i. Addressing performance of a particular program officer / staff member	<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"/>
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"/>
l. Other: <i>(Please specify)</i> _____	<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.

10. Did the GPR results confirm any assumptions your foundation had about its performance going into the assessment process?

Yes No

Please explain.

11. Did the GPR results challenge any previous assumptions or raise new concerns about your foundation's performance?

Yes No

Please explain.

Background and the Overall GPR Experience

12. What was your foundation's primary motivation for undertaking the GPR?

13. Relative to other processes your foundation has undertaken to assess its overall effectiveness as a grantmaking organization, how useful was the GPR? Don't Know/Not applicable (no other assessment processes undertaken)

Much Less Useful Much More Useful

1 2 3 4 5 6 7

Please explain: _____

14. How valuable was the GPR relative to its cost?

Very Poor Value for the Cost Excellent Value for the Cost

1 2 3 4 5 6 7

Please explain: _____

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

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

About You

21. 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 _____

22. 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

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

Thank you for your time and input!