



LAFRANCE ASSOCIATES

Learning For Action

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

Final Report

July 1, 2005

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I. Introduction

Background and Context on the GPR

Measuring foundation effectiveness presents an elusive methodological challenge for by the very nature of their work the impact of foundations is most often indirect and difficult to isolate from the myriad other factors that determine the success of their grantmaking and other efforts. Despite this among other associated challenges, an increasing number of philanthropic organizations—indeed representing a movement within the field as a whole—are seeking answers to questions about their own effectiveness.

Within this context, the Center for Effective Philanthropy has played an important role in addressing the challenge of finding useful measures of a foundation’s effectiveness. In response to the emerging need and interest, CEP developed the Grantee Perception Report (GPR) as one approach to measuring 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. To date, 80 foundations have commissioned the GPR. The GPR instrument asks grantees to rate the foundation’s performance and effectiveness in the following areas²:

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

The GPR offers unique value to foundations by providing not only a summary of results for the individual foundation, but also 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.

Purpose of this Assessment

CEP engaged the services of the third-party evaluator LaFrance Associates, LLC (LFA) to focus the lens of assessment on their GPR service. The primary areas of focus for LFA’s assessment of the GPR include:

1. Foundation satisfaction with the GPR process and product, and CEP’s presentation of the data to commissioning foundations;
2. Specific areas of 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 offers other services to assess foundation effectiveness, such as the Applicant Perception Report. Visit <http://www.effectivephilanthropy.org> for more information.

² For additional information about the GPR, please refer to *Listening to Grantees: What Nonprofits Value in their Foundation Funders* at http://www.effectivephilanthropy.org/publications/publications_overview.html.

Our assessment of the GPR is not a technical review or critique of the methodology, although some foundation respondents took the opportunity to provide their perspective on such issues as reliability and validity of the GPR instrument and analysis processes.

Subscriber Assessment Methods

Based on the study purposes, LFA designed an on-line assessment survey.³ CEP provided us with a list of primary contacts at each of the 63 foundations that had commissioned the GPR to date and had received their report and presentation from CEP. In total, 45 of these 63 foundations completed the on-line survey, representing a respectable 71.4% rate of response.

Key Note

- 71.4% of foundations commissioning the GPR responded to this assessment survey.

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 their GPR "round" (i.e., when the foundation commissioned the GPR). In general, there are very few areas where statistically significant findings emerged. Differences that are significant are noted in the report. We conducted content analysis to identify themes in responses to qualitative, open-ended questions included on the assessment survey.

The following identifies strengths and limitations of this study.

Study Strengths

The primary strength of this assessment is the strong rate of response. Another strength is that in nearly every case we were able to get feedback from the foundation staff person who had been most directly involved in the GPR process with CEP. In other words, we had access to the most direct source of feedback for CEP on the GPR. Lastly, though perhaps most obviously and 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.

Limitations

This assessment also has some limitations. First, as mentioned above, we restricted the parameters of the assessment 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 questions about areas of change in which foundations have engaged. These results should be interpreted with this caution in mind. Third, while the rate of response was high, our overall sample size is small for extensive bivariate and multivariate statistical analyses.

CEP is committed to engaging in this assessment of the GPR on a regular basis, and over time our sample size will grow, enabling more possibilities for and greater confidence in multivariate statistical analyses.

³ Please refer to the Appendix to this report for a copy of the GPR Assessment Survey.

Characteristics of GPR Assessment Survey Respondents

LFA distributed the GPR satisfaction survey to each foundation's primary contact with CEP at the time the GPR was commissioned. This model for administering the survey ensures that those individuals who have the most contact with CEP, and therefore the most extensive interaction, provide responses related to satisfaction, changes within the foundation as a result of the GPR, and their perception of the GPR's value. The majority of respondents (60.6%) hold executive-level positions of either CEO or Vice President for Programs within their foundations, as shown in Exhibit 1 at right ➡. Approximately one-in-ten are Program Officers. Nearly one-quarter report other titles such as Senior Program Officer, Program Director, or Director of Evaluation.

These primary contacts have been in their current positions for a range of years, but three-fourths have been at their jobs for four or more years, as displayed in Exhibit 2 at right ➡.

Exhibit 1
Respondent's Role/Position in Organization
(n=40)

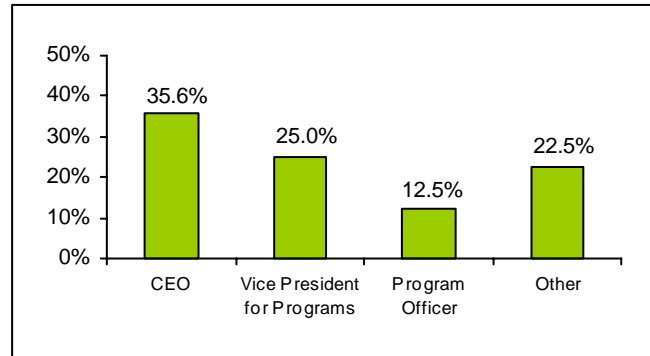
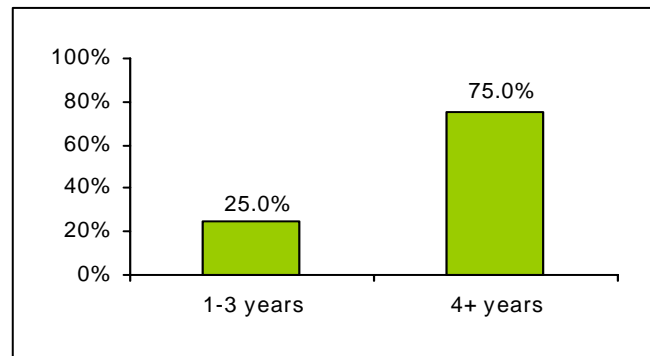


Exhibit 2
Respondent's Length of Time in Current Position
(n=40)



II. Key GPR Assessment Findings⁴

Why the GPR Assessment

To help CEP understand the reasons foundations are using the GPR to assess overall foundation effectiveness, subscribers explained their impetus for undertaking the GPR process. The primary motivation foundations identified for using the GPR is to get feedback from grantees that is independent and comparative. Other motivations include a desire to engage in best practices, strategic planning, new leadership, and CEO interest.

How the GPR Compares to Other Measures of Foundation Effectiveness

“Past foundation-led efforts did not result in anything helpful. Using a professional and unbiased third party allowed us to get the kind of feedback – both positive and negative – we were looking for.”

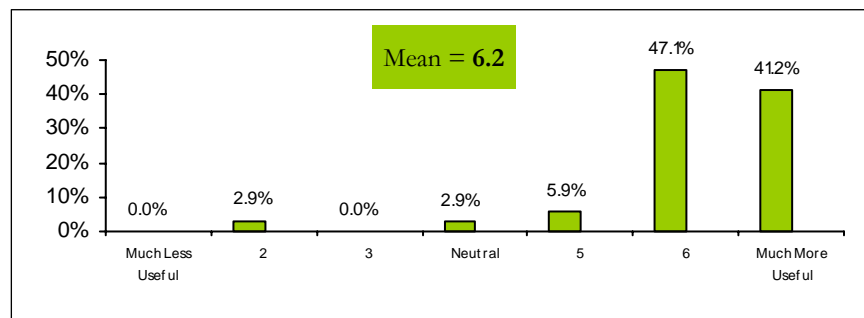
“We were motivated by the ability to receive candid feedback through a third party, strengthened by comparisons to a cohort that provide a context for our foundation’s ratings.”

“We like to have periodic opportunities for our grantees to give us feedback. This was an efficient and better way to gather that information than doing it ourselves.”

—GPR Assessment Survey Respondents

Nine out of ten (94.2%) GPR customer foundations identify the GPR as more useful than other processes undertaken to assess overall foundation effectiveness (mean=6.2)⁵. See Exhibit 3 📊.

Exhibit 3
GPR Usefulness Relative to Other Processes for
Measuring Overall Foundation Effectiveness
(n=34)



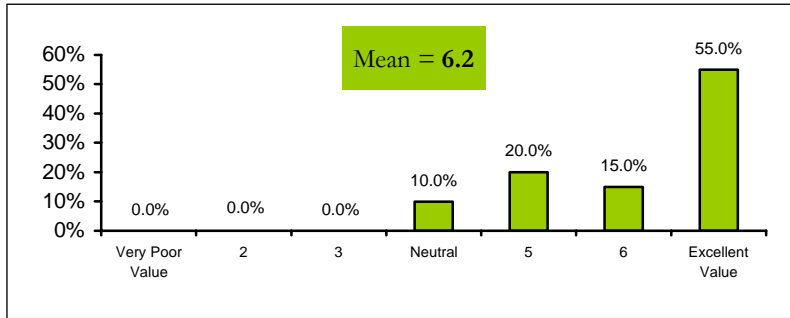
In open-ended comments, respondents consistently remark that the GPR’s ability to provide comparative data is what makes it stand out relative to other processes for measuring overall foundation effectiveness. One GPR subscriber stated that, “Our own surveys of grantee satisfaction tended to give us a 97% positive rating and seldom offered the sort of feedback that prompted review of our processes.” 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.

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

⁵ Five GPR subscribers have never participated in other assessment processes and thus had no basis for comparison.

Nine out of ten GPR subscribers (90.0%) also consider the GPR very valuable relative to its cost (mean=6.2). Over half (55.0%) of foundations report that the GPR is an “excellent value” relative to cost. See Exhibit 4 📊.

Exhibit 4
Value of GPR Relative to Cost
 (n=40)



“Especially compared to other outside consultants who have tried to provide management assistance advice, this was a bargain.”

“We could not have obtained the data comparing [our] foundation to other foundations at anywhere near the cost of the GPR.”

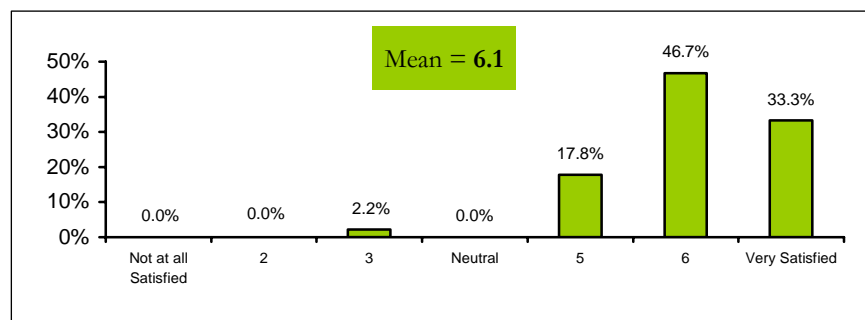
—GPR Assessment Survey Respondents

In explaining the value of the GPR relative to its costs, respondents in general report there is simply no comparable mechanism for measuring the overall effectiveness of foundations at anywhere near the cost of the GPR.

Satisfaction with the GPR Report and its Usefulness

Foundations commissioning the GPR are overwhelmingly satisfied with the GPR experience overall. Virtually all (97.8%) rate their overall GPR experience positively. See Exhibit 5 📊.

Exhibit 5
Satisfaction with the GPR Experience Overall
 (n=45)



As Exhibit 6 shows, foundations also rate the usefulness of the GPR report very highly. Nearly all (97.5%) say that the report provided valuable information for reflection, 90.2% report that the GPR highlighted specific areas in which their foundations are performing well, and 88.1% report the GPR highlighted areas for foundation improvement. Four out of five (81.4%) foundations are also satisfied with CEP's interpretation of results, an important satisfaction dimension for understanding the importance of CEP's role.

Exhibit 6
Satisfaction with the GPR Report
(n=45)

Area of Satisfaction with the GPR Report	Percent Satisfied	Mean (7-pt Scale)
The extent to which CEP's interpretation of the results was meaningful for guiding reflection on foundation's performance overall (n=43)	97.5%	5.7
The extent to which the GPR highlighted specific areas in which foundations are performing well (n=41)	90.2%	5.8
The extent to which the GPR highlighted specific areas in which your foundation could improve (n=42)	88.1%	5.7
The clarity of data charts and graphs in the GPR report (n=42)	79.1%	5.2
The usefulness of the GPR report on its own, without CEP staff explanation (n=43)	62.8%	4.7

One area where foundations expressed less satisfaction is in the clarity of the GPR report. Foundations rated the usefulness of the GPR report on its own, without the benefit of CEP interpretation, the lowest of the six dimensions assessed. The data indicate that foundations rely on the in-person presentation by CEP staff to fully understanding the results included in its GPR report. In fact, foundations rated the in-person presentations the most helpful of all services and deliverables provided by CEP other than the GPR report itself. See Exhibit 7.

Exhibit 7
Helpfulness of the GPR Report and Presentations
(n=45)

Aspects of the GPR Report and Presentations Received	Percent Ranked "Helpful"	Mean (7-pt Scale)
Supplemental and/or additional in-person presentations (n=22)	95.7%	6.5
In-person CEP presentation (n=40)	95.0%	6.5
Custom segmentation of data by custom grouping (n=27)	88.9%	5.9
Excerpts of presentations for board or public posting (n=26)	88.5%	6.3
Regression or other analysis to explore other trends in data (n=20)	85.0%	5.7
Comparison to a custom group of foundations (n=36)*	83.3%	6.1
"Other" custom CEP service (n=10)**	80.0%	5.8
Custom segmentation of data by program area (n=34)	76.5%	5.7
Statistical significance testing (n=34)	73.5%	5.4
Provision of sample communications to grantees or other constituents (n=19)	68.4%	5.4
Report showing results from one program officer/area (n=20)	65.0%	5.2

* Other segmentation was around geography, grant type and size, as well as respondents' race/ethnicity.

** Other custom CEP services received include additional consulting from CEP to further explore aspects of GPR results, the addition of custom questions to the GPR survey, and the commissioning of CEP to conduct additional surveys.

GPR subscribers rated all of the other CEP deliverables or activities above the "helpful" threshold. The services offered by CEP fall into two distinct clusters: presentations by CEP and analysis of GPR results. Overall, GPR subscribers report CEP staff's in-person presentations of GPR results are of great benefit in understanding and interpreting findings. Ninety-six percent of respondents indicate that the presentations are helpful, with 69.6% reporting the presentations are "very helpful."⁶ Foundation responses related to GPR data analysis reveal that more than four-fifths of respondents found CEP's custom

⁶ 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."

segmentation of data, regression analysis to explore trends in data, and comparisons to a custom group of foundations to be helpful.

Two additional survey questions also focused on the impact of CEP's in person presentation: *How effective was the CEP presentation in increasing your foundation's understanding of the GPR results?* and *How effective was the CEP presentation in increasing your foundation's ability to translate the GPR results into useful follow-up actions the foundation could take?*

Nearly all (95.0%) foundations report that CEP's in-person presentation increased their understanding of the GPR results, with 60.0% reporting the presentation is "very effective" (mean=6.3). This finding indicates that CEP is providing an important service by presenting GPR results. Facilitation of a foundation's initial conversation about GPR results is clearly seen as value added to the entire GPR process.

Analysis of how effective the CEP presentation is at increasing a foundation's ability to translate results into useful follow-up actions ranked lower, but quite positive as well. Four in five (80.0%) foundations report that the presentation did increase their foundation's ability to establish follow-up actions based on the results of the GPR, with 32.5% stating that the presentation was "very effective" at doing so (mean=5.6).

However, the largest foundation subscribers (foundations with over \$1 billion in assets) report that the in-person presentation was less likely to increase their foundations' ability to translate the GPR results into useful follow-up action the foundation could take (mean=4.3) compared to foundations with smaller assets (mean=5.9). This is one of the very few statistically significant findings of our analysis of results by foundation type and other independent variables.

III. The GPR’s Influence on Organizational Practices

Perhaps the most important measure of the GPR’s utility is the change that it inspires in foundations that commission it. To better understand this issue, foundations described in the assessment survey whether the GPR informed any changes in the way they operated and if so, in what areas. By this measure, GPR is an effective evaluation tool for foundations: Ninety-seven percent of respondents said that the GPR informed change in their foundation (n=39).

The Kind of Change the GPR Informs

The GPR has a wide impact, but its sphere of influence is greatest in areas of grantmaking processes and grantee engagement.

Grantee Engagement

The GPR results inspired the greatest action in the way that foundations engage grantees, as shown in Exhibit 8 ➔. In a field where power differentials can easily create distance between the grantor and grantee, the GPR prompted more than two-thirds of foundations to help bridge this gulf by improving their communication with grantees. Some examples of improvements that foundations made are:

- Revamping websites and other communications materials to provide more helpful information;
- Clarifying expectations of grantees and how decisions are made; and
- Increasing personal contact with grantees before, during, and after the grant.

In addition to prompting foundations to improve the clarity and frequency of communication, the GPR has also helped foundations understand how well they relate to grantees on a personal level and prompted some to modify the attitude with which they interacted with grantees. For one foundation, the attitude shift meant “Viewing [grantees] as partners and customers.” For another foundation, it meant “Understanding that grantees desire more interaction with program staff [and] accepting that it's time well spent.” Collectively, these changes exemplify the impact that the GPR has on the clarity, frequency, and respect with which foundations communicate with grantees.

Grantmaking Processes

Foundations depend on a substantive application process to decide in which organizations they should invest. Some foundations impose requirements that grantees find cumbersome. The GPR helps foundations strike a balance in the grantmaking process: almost two-thirds of foundations report that the GPR helped them improve their process. The most often cited improvements include:

Exhibit 8
Areas of Foundation Change Informed by the GPR
(n=39)

Area of Change	Percent of Foundations*
Communication with grantees	69%
Grantmaking processes	62%
Assistance beyond the check	54%
Attitudes towards work with grantees	39%
Grantmaking patterns	33%
Grantmaking strategy	28%
Addressing performance of program areas	18%
Addressing performance of program officers	18%
Staffing levels	15%
Allocation of resources for program area	3%

*Several respondents said that it was too soon to tell what changes they would be making as a result of the GPR, though they said that changes in these areas were possible. Thus, percentages will likely grow in time.

- Simpler, streamlined procedures that are commensurate with size of grant (e.g., decreasing the requirements for smaller grants and accepting common grant applications);
- Quicker turn-around times; and
- More substantive and timely evaluation feedback for grantees.

The areas in which the GPR had the greatest impact share the trait of being part of a grantee’s direct experience of the process. Who better than grantees to speak about the quality of interactions they have with the foundation or about the usefulness of the grant process? The GPR is particularly effective at informing change in the foundation’s grantmaking process, and it does this by listening to the individuals who experience the process first hand.

Additional GPR-Inspired Changes

These matters of process do not circumscribe GPR’s impact. More than half (54%) of subscribers said they improved their offering of assistance beyond the grant check. One-third of foundations report making improvements in grantmaking patterns that better serve grantees, such as increasing the number of multi-year grants and the amount given to core operating support. Such changes offer more financial stability and flexibility for nonprofits than one-time and targeted grants provide. The GPR has also helped more than a quarter (28.2%) of subscribers make improvements in their grantmaking strategy—including setting priorities within program areas, clarifying community engagement strategies, and in one case, eliminating a program area altogether. Other areas where the GPR has informed change are in staffing levels, performance of program areas, and performance of program officers.

Additional GPR-Inspired Changes

Grantmaking Patterns

- ✓ “More multi-year grants and more core operating support”
- ✓ “We’re at last more closely examining the ‘grant load’ connection with grant duration”

Grantmaking Strategy

- ✓ “We eliminated one program area”
- ✓ “We set priorities within each grantmaking focus area. Established outcomes can be used to measure results across grantees.”

Assistance Beyond the Check

- ✓ “Seeing technical assistance as part of the package”

Addressing performance of program officers

- ✓ “We use the GPR in annual reviews of program officers.”

Staff Levels

- ✓ “GPR justified additional program staff to the Board.”

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 contradict a long-held assumption.

One foundation remarked, “We thought our applicants really appreciated the help our program officers provided on the front-end to help nonprofits present a winning proposal. In fact, the nonprofits didn’t value it, and our program staff was overwhelmed by the workload. We were spending all of our time getting grants approved, thus leaving no time to measure impact or help with effectiveness.” As a result of the GPR, the foundation is in the process of redistributing

where it spends its time, moving energy from the front end to the back end of the process. In this case, the GPR challenged a foundation's focus in one area and helped shift its focus to another area that would bring greater benefits to the grantee and the foundation staff.

The GPR can expose an area that requires attention.

For another foundation, the GPR revealed “[t]hat one grant program was significantly less happy than another – this was news to us and we’ve changed our processes to try to correct applicant/grantee concerns.” In this case, the GPR helped bring attention to an area that the foundation did not perceive to be a problem.

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

One foundation said, “We already knew we were not as strong as we would like to be in some areas (engagement and feedback around final reporting, for example), and the GPR has helped rally staff to improve practice.” In this case, even though the GPR results confirmed existing beliefs, it still prompted the foundation to initiate improvements by persuading various stakeholders in the organization that change was necessary.

The GPR can help bolster an existing change effort in mid-stream.

“We have always believed that having volunteers conduct personal interviews with applicants was good, while cumbersome and time consuming. We have strengthened a good process and made it better.” In this case, the GPR results helped add additional fuel to continue a quality initiative.

The GPR can ensure the continuation of good work.

For some foundations, receiving the GPR results was a payoff for their hard work: “We work hard at the relationships and that showed in the results.” In this case, the GPR validated a foundation's efforts in the area of grantee relationships and helped ensure that these efforts continue.

The GPR can help generate healthy debate.

As one foundation reported, “Some program officers wonder whether grantee perceptions in certain areas really ‘count.’ Of course the internal debate around these questions has been fantastic.” In this case, even when the GPR results did not provide a clear roadmap for action, the debate over what action is necessary was valuable.

Good information enables foundations to act and improve. It doesn't guarantee action, but without good information, right action is not possible. As these results show, the GPR provides foundations with good information that they are able to act on in a variety of different areas of foundation effectiveness. One foundation expressed the impact of the GPR succinctly: “When we knew better, we did better.”

IV. Satisfaction with the CEP Team and the GPR Process

Reflections on CEP Staff

Our GPR assessment examined five dimensions of satisfaction with the CEP staff; in each area, CEP staff rate very highly.

All foundations (100%) report that CEP staff delivered on what it promised for the GPR. In addition, 98% report satisfaction both with CEP's responsiveness to questions and also their communication during the process, as Exhibit 9 reveals ↻. Nine out of ten (93.4%) foundations also report that CEP staff provided helpful answers to their questions. In open-ended survey comments, GPR subscribers consistently praised CEP staff for their professionalism, expertise, and friendliness.

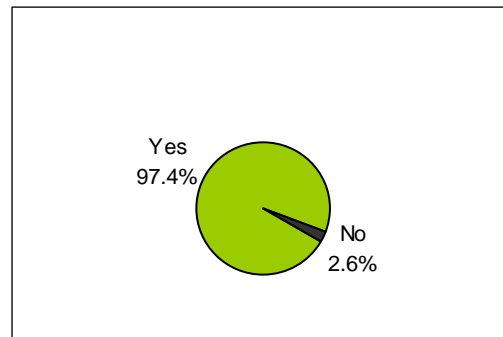
Exhibit 9
Satisfaction with CEP Staff

Areas of Satisfaction with CEP staff	Percent Satisfied	Mean (7-pt Scale)
Extent to which CEP delivered on what it promised for the GPR (n=40)	100%	6.5
Responsiveness of CEP staff to questions (n=44)	97.7%	6.6
Clarity of CEP's communication in the process (n=40)	97.5%	6.5
Helpfulness of CEP staff's responses to questions (n=45)	93.3%	6.1
Clarity of CEP's explanation of what the GPR is and is not (n=40)	90.0%	6.4

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; essentially all (97.4%) GPR subscribers recommend the GPR to colleague foundations, as shown in Exhibit 10 ↻. Furthermore, nearly all (93.4%) foundations report satisfaction with the timeframe of the GPR—from the launch of the survey to receipt of the report and presentation. Foundations also indicate that it is not a hindrance that the GPR is conducted in two cycles each year.

Exhibit 10
Would Subscribers Recommend the GPR to Colleague Foundations?
(n=40)



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.

V. Future Interest in and Recommendations for the GPR

Future Interest in the GPR

Another important area of exploration in the GPR subscriber assessment is foundations' future interest in commissioning the GPR. Fifty-nine percent of GPR customer foundations intend to commission the GPR again in the future, as shown in Exhibit 11. Note that no GPR subscriber reported their foundation would *not* commission the GPR in the future.

One important finding is that subscribers' perception of the GPR's value appears to increase as time passes. The more distant the round in which the GPR was conducted, the more likely the foundation was to say it intends to commission the GPR again. For instance, while 46% of foundations that commissioned the GPR in the Fall 2004 said they intended to commission it again, 83% of those who commissioned the GPR in the Spring of 2003 said they intend to do so again. One interpretation of this finding is that it does not take long for most foundations to see the value of commissioning the GPR again—only a year and a half separates a 45% positive response rate from an 83% positive response rate—but it does take time for some foundations to recognize the importance of going through the GPR process again. Overall, these data suggest that as time elapses, the value of the GPR to subscribing foundations grows and as a result, their desire for a new assessment increases.

Exhibit 11
GPR Subscribers' Intention to Commission the GPR Again in the Future
(n=39)

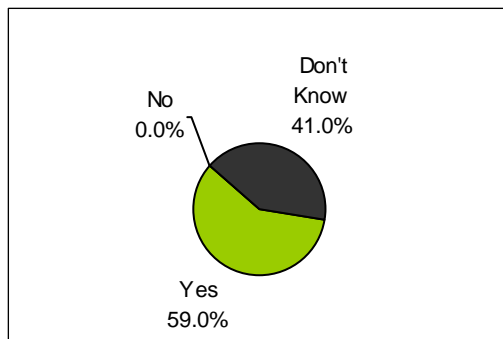
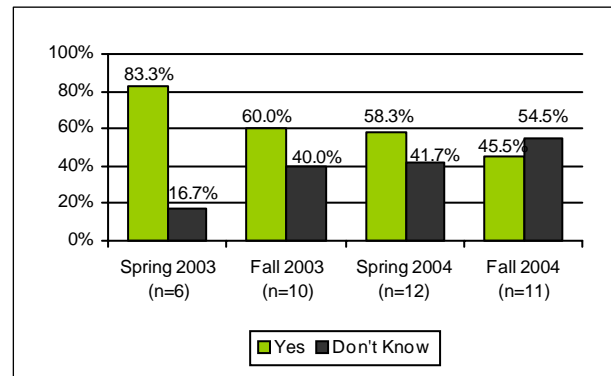


Exhibit 12
GPR Subscribers' Intention to Commission the GPR Again in the Future, by Round



Desired GPR-Related Services

As foundations begin to commission the GPR again in the future, CEP will be well served to understand the aspects of the GPR process and products past customers seek most should they commission the GPR again. When asked to indicate their level of interest in available GPR-related services, subscribers identify the highest interest in GPR results analysis that compares their foundation to a custom group of foundations. Also receiving mean scores of 6 on a 7-pt scale are: in-person CEP presentations; excerpts of presentations for board or public posting; survey of grants applicants that did not receive foundation support; and, custom segmentation of GPR results by program area. See Exhibit 13 below. Of least interest to potential future GPR returning

customers, and the only dimension ranking lower than the mean ≥ 5 threshold, is a consulting engagement to further explore aspects of GPR results.

Exhibit 13
Interest in Available GPR-Related Services, if Commissioned Again

Available GPR-Related Services	Percent Interested	Mean (7-pt Scale)
Comparison to a custom group of foundations (n=40)	95.0%	6.5
In-person CEP presentation (n=40)	92.5%	6.3
Survey of grant applicants that did not receive foundation support (n=34)	88.2%	6.1
Custom segmentation of data by program area (n=37)	86.5%	6.0
Excerpts of presentations for board or public posting (n=36)	86.1%	6.1
Statistical significance testing (n=34)	82.4%	5.9
Supplemental and/or additional in-person presentations (n=35)	77.1%	5.6
Provision of sample communications to grantees or other constituents (n=35)	74.3%	5.4
Regression or other analysis to explore other trends in data (n=30)	73.3%	5.6
Custom segmentation of data by custom grouping (n=32)	71.9%	5.3
Focus groups (n=32)	68.7%	5.2
Report showing results from one program officer/area (n=33)	63.6%	5.2
Consulting engagement to further explore aspects of GPR results (n=31)	45.2%	4.3

Improving the GPR

While subscribers express high overall satisfaction with the GPR—from the product itself to the process—they gave lowest scores on the clarity of the data charts and graphs in the report and the usefulness of the GPR report on its own, without CEP staff explanation. This suggests that the CEP has an opportunity to improve the accessibility and clarity of the GPR report and lessen foundations’ reliance on CEP’s in-person presentation to understand the results.

Furthermore, in open-ended questions GPR subscribers provided input on improving the GPR process and/or report. While respondents are supportive of CEP and urge the staff to continue to refine and improve the process and report based on their experience in administering the GPR, a few comments stand out. First, a few respondents recognize that CEP “has a point of view on what makes grantmaking effective” and that it is “reflected in the questions.” One customer said, “I (and my board) would have appreciated a little more explanation of that as a framework for the instrument.” Another subscriber expressed a similar impression this way: “The questions should be rewritten so that they reflect what the grantees are interested in. There are too many assumptions inherent in the questions about what grantees want from a funder.” Second, one respondent asks that CEP no longer “truncate the graphic presentation of findings.” Lastly, a few respondents encouraged CEP to create a “how-to” sheet for the rollout of GPR results. “We had a lot of stress when we presented the data in-house...it would have been helpful to be prepped for the politics of rolling out data based on CEP’s experiences.”

Conclusion

Within the philanthropic sector there is an ever-growing interest in understanding how foundations can increase their effectiveness. Stakes are too high and resources too limited for foundations not to strive for maximum impact of their dollars. Yet, for all the discussion within the field, there are strikingly few practical, valid measures by which foundations can gauge their own effectiveness. The overwhelmingly positive satisfaction with the GPR by CEP's customers is an indication that foundation staff and leadership find this tool to provide clear and useful feedback on how well they are doing.

The strengths of the GPR, according to its customers, are many: it allows foundations to get honest, candid feedback from their grantees through an independent third party; it provides valuable information at a reasonable cost; and it allows foundations to benchmark their performance against that of their peer organizations. Among the most persuasive evidence of the GPR's value is that foundations have used it as the basis for real change. Virtually all of its customers – 97% – said that the process informed changes in how they operate. While many of these changes revolved around improving grantee relations (such as improved communications, clarifying expectations, and increasing personal contact), other changes were at the organizational or systems level. Perhaps most importantly, some customers reported that the GPR helped to broaden their understanding of the role of philanthropy, including the ways in which they add value to their grantees, and the nature of the funder/grantee relationship.

The GPR is just one tool for understanding foundation performance. It is not (nor is it meant to be) a replacement for program evaluation and other methods for understanding a foundation's social impact. Yet the value it has had for its customers is strong evidence of its importance. As more foundations participate, the instrument will continue to be refined and its power as a benchmarking tool will continue to increase. The GPR not only helps foundations measure their own effectiveness, the very process actually contributes to it.

"I think that any foundation that is serious about improvement should go through this process."

"All I know is that we started on a journey of continuous improvement based on the survey results that has gone well beyond what we learned within the confines of that project."

—GPR Assessment Survey Respondents

Appendix:
The GPR Subscriber Assessment Survey Instrument

The Grantee Perception Report (GPR) Subscriber 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 the 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. We estimate it will take you approximately 15-20 minutes. If you have any questions, please contact Michael Lee at LFA, Michael@LFAgroup.com or 415.241.0605 x306.

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 the Center for Effective Philanthropy 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 Center for Effective Philanthropy staff provided to questions your foundation had?

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

4. How satisfied were you with the timeframe of the GPR: from the launch of the survey to the time you received the report and presentation(s)?

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

5. Is it a hindrance that the GPR is only conducted twice a year?
 Yes No

Please explain.

About the GPR Report and Services

6. 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 on its own (without CEP staff explanation) the GPR report was	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	

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

Custom 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. In-person presentation by CEP staff	<input type="checkbox"/>	1	2	3	4	5	6	7	
b. Supplemental in-person presentation(s) (e.g., to the board)	<input type="checkbox"/>	1	2	3	4	5	6	7	
c. Custom segmentation of the data by <i>program area</i>	<input type="checkbox"/>	1	2	3	4	5	6	7	
d. Custom segmentation of the data <i>Other:</i> _____	<input type="checkbox"/>	1	2	3	4	5	6	7	

Custom 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
e. Comparison to a custom group of foundations	<input type="checkbox"/>	1	2	3	4	5	6	7
f. Statistical significance testing	<input type="checkbox"/>	1	2	3	4	5	6	7
g. Regression or other analysis to explore trends in data	<input type="checkbox"/>	1	2	3	4	5	6	7
h. Creation of excerpt presentations for board or public posting	<input type="checkbox"/>	1	2	3	4	5	6	7
i. Provision of sample communications to grantees or other constituents from other foundations	<input type="checkbox"/>	1	2	3	4	5	6	7
j. Report showing results for one program officer/area	<input type="checkbox"/>	1	2	3	4	5	6	7
k. Other: _____	<input type="checkbox"/>	1	2	3	4	5	6	7

8. If the foundation were to commission the GPR again in the future, which of the following services might you be **interested in receiving**? (Please be sure to include both services you received in the past and would be interested in receiving again, as well as services you would be interested in receiving for the first time.)

Custom CEP Service	Don't Know/ Does Not Apply	Not at all Helpful	Helpfulness in deepening your foundation's ability <i>to use GPR to reflect on its performance</i>					Very Helpful
a. In-person presentation by CEP staff	<input type="checkbox"/>	1	2	3	4	5	6	7
b. Supplemental in-person presentation(s) (e.g., to the board)	<input type="checkbox"/>	1	2	3	4	5	6	7
c. Custom segmentation of the data by <i>program area</i>	<input type="checkbox"/>	1	2	3	4	5	6	7
d. Custom segmentation of the data <i>Other: _____</i>	<input type="checkbox"/>	1	2	3	4	5	6	7
e. Comparison to a custom group of foundations	<input type="checkbox"/>	1	2	3	4	5	6	7
f. Statistical significance testing	<input type="checkbox"/>	1	2	3	4	5	6	7
g. Regression or other analysis to explore trends in data	<input type="checkbox"/>	1	2	3	4	5	6	7
h. Creation of excerpt presentations for board or public posting	<input type="checkbox"/>	1	2	3	4	5	6	7
i. Provision of sample communications to grantees or other constituents from other	<input type="checkbox"/>	1	2	3	4	5	6	7

Other General Public

Other: _____

If the foundation has not shared GPR results with all, or some, of the above list, why not? _____

13. Did the GPR results inform your foundation's decision-making or practices in the following aspects of your work? *Check all that apply.*

Grantmaking patterns (e.g., size and length of grants)

Grantmaking processes (e.g., turnaround time)

Grantmaking strategy (e.g., what it is you're trying to do, focus)

Communications with grantees (e.g., clarity, methods)

Addressing performance of or approach to a particular program area

Addressing performance of a particular program officer

Allocation of resources for a particular program area

Staffing levels

Attitudes towards work with grantees

Assistance beyond 'the check' (e.g. management assistance, field-related assistance, assistance securing funding from other sources, etc.)

Other: _____

For each area, if any, in which the GPR has affected change in your foundation's work, please list the changes made.

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

Yes

No

Please explain.

15. 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

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

17. 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: _____

18. 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: _____

19. 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. Clarity of CEP's explanation of what the GPR is and is not	1	2	3	4	5	6	7
c. The extent to which the CEP delivered on what it promised for the GPR	1	2	3	4	5	6	7
d. The value of the GPR in providing your foundation with information for reflection	1	2	3	4	5	6	7

20. How did your foundation first hear about the GPR?
- From direct contact with a CEP for Effective Philanthropy staff member
 - From materials distributed by the Center for Effective Philanthropy
 - At a presentation/speaking engagement by the Center for Effective Philanthropy
 - At a Center for Effective Philanthropy seminar
 - From a peer or colleague (word of mouth)
 - From a newspaper, journal, or other publication
 - From a funder network (such as GEO)
 - Other: _____

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

Yes No Don't know

If Yes, within what approximate timeframe?

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

If No, please explain: _____

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

Yes No

Please explain: _____

23. Is your foundation interested in discussing the GPR experience with other GPR subscribers?

Yes No Don't know

If yes, please tell us what topics you are interested in discussing?

24. What could the Center for Effective Philanthropy improve about the GPR process and/or report?

About You

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

CEO/Executive Director
 Vice President for Programs
 Program Officer
 Other: Please specify _____

26. 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

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

Thank you for your time and input!