



November 28, 2012

To Residents of Pottawattamie County:

The Iowa West Foundation (IWF) seeks to improve the quality of life and standard of living in southwest Iowa and the Council Bluffs-Omaha metropolitan region by implementing a high-impact, results-oriented grant making program. To that end, the Foundation's grant making processes strive to be community and customer-focused, accessible, transparent and consistent.

This year provided the perfect timing for IWF to step back and assess our grant making performance toward these goals. My transition as the new CEO, along with the initiation of an organization strategic planning process, provides a great opportunity for us to evaluate how we are doing, listen to important feedback and adjust our practices, where necessary. This spring, we commissioned the Center for Effective Philanthropy (CEP) to assess our grant making performance by surveying our current grantees.

Since 2003, CEP has used the Grantee Perception Report (GPR) to survey donor grantees and benchmark the results against a dataset of 284 funders. The survey covers many areas in which grantee perceptions are useful in assessing the performance of grants programs. In June, CEP sent out surveys to 118 Iowa West grantees and received 88 completed responses (an impressive 75% response rate).

Here's what we discovered:

- Our grantees express deep gratitude about the role IWF plays in the community; specifically, our focus on small communities in southwest Iowa.
- Despite these comments about our impact, grantees were less positive about the effectiveness of IWF's grants program.
- IWF rated lower for measures related to impact on grantee organizations.
- IWF received lower than typical ratings for its understanding of grantees' goals and strategies, and its impact on the ability of grantees to continue the funded work.
- Grantees gave IWF much lower ratings than typical for the quality of its relationships with grantees, reporting much lower levels of engagement with IWF than other comparable foundations.
- Grantees also report that the IWF grant selection process involves fewer personally-engaging aspects than is typical.
- Grantee ratings of IWF's application and reporting processes were typical.

- The median IWF grant is lower than the typical funder. In addition, general operating support and multi-year funding were lower than the dataset of similar foundations.

While not entirely positive, we appreciate our grantees' participation and responses. It is sometimes very hard for an organization to be honest with its funder; however, it is only through this honesty that we can improve and provide greater value to our community. Thanks to our grantees, we heard you and here's how we plan to respond:

- First, in the spirit of transparency, we have decided to post the full GPR to our website and disclose the findings. We welcome your comments, feedback, and/or questions.
- We will update our website to provide more clear and consistent communications to the public regarding our plans, programs and performance.
- We are undertaking a thorough review of our grant application and reporting systems with the goal of streamlining these processes for greater efficiency and user-friendliness.
- We have assigned grant staff to work with grantees as primary contact persons, increasing the direct relationship between IWF and grantees.
- As part of our strategic planning, we are identifying opportunities for IWF to take a greater leadership role on community issues that involve our grantees.
- We are assessing ways we can provide increased value to our grantees and the community by supporting increased investments in organizational capacity building, leadership development, and technical assistance.

We are committed to continuous improvement, learning from our experiences, and applying best practice knowledge and tools to our work. We have high expectations for our performance and the quality of our grantee and community relationships. We will work hard to address the feedback you gave us.

Sincerely,

A handwritten signature in blue ink that reads "Pete Tulipana". The signature is fluid and cursive, with a large initial "P" and a long, sweeping underline.

Pete Tulipana, MPA
President and CEO