

Grantee Perception Report®

prepared for

Iowa West Foundation

September 2012



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EFFECTIVE PHILANTHROPY

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Executive Summary – Key Findings

Many of the Iowa West Foundation's grantees express deep gratitude for the role the Foundation plays in the community. One grantee explains, "For small communities in Southwest Iowa, Iowa West makes many programs and improvements possible. That, in itself, is a miracle in these rural areas." Despite comments like this about the Foundation's impact or grantees' gratitude, grantee comments about the effectiveness of the Foundation are often less positive. And on many measures throughout the GPR, Iowa West is rated lower than the typical Foundation.

On average, Iowa West **grantees rate the Foundation typically for its impact on their organizations and their communities.** But the Foundation receives lower than typical ratings for its understanding of grantees' goals and strategies and the Foundation's impact on grantees' abilities to continue the funded work.

Iowa West grantees rate the Foundation much lower than typical for the quality of its relationships with grantees. Specifically, Iowa West receives lower than typical ratings for aspects of both interactions and communications with grantees. Many grantee comments reflect their frustration with their relationships with the Foundation. One grantee explains that, "foundation staff did not seem inclined to help." Another describes staff as a "gatekeeper" that feels more like "keeping people out than assisting with accessing funds."

The helpfulness of the selection process at Iowa West is also rated lower than typically. **Grantees at Iowa West report that their selection process involves fewer personally-engaging aspects than is typical.** Grantees who indicate these activities did occur, though, rate the selection process to be more helpful than do other Iowa West grantees. Similarly, Iowa West grantees less frequently indicate that there was a discussion of their report or evaluation, though those who did have such a discussion rate the evaluation process to be more helpful in strengthening their work. Even though a lower than typical proportion of grantees engage in these types of activities, the administrative time required by Iowa West is similar to the time required at the typical foundation. Combined with lower than typical grant size and length, this means Iowa West grantees receive a lower dollar return per administrative hour spent on their grants.

Executive Summary – Key Findings

Some low ratings, particularly those related to relationships with grantees, may be related to the Foundation's context: Iowa West Foundation has annual giving that is similar to the typical funder in CEP's dataset, but Iowa West reported fewer full time staff members and a smaller proportion than typical of those staff are program staff. As a result, Iowa West employees are managing far more applications and grants than employees at the typical foundation – more than 100 active grants per full-time program employee at Iowa West compared to about thirty active grants per full-time employee at the typical foundation.

Few Iowa West grantees receive the relatively large, multi-year, general operating support grants that CEP research has shown to be most impactful on grantee organizations. The median Iowa West grant is \$39K, compared to \$50K at the typical funder, 8 percent of Iowa West grantees report receiving general operating support compared to about 20 percent typically, and only 33 percent report receiving multi-year grants compared to about 50 percent at the typical foundation. Grantees who do report receiving general operating support rate the Foundation higher for its impact on their organization.

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- ♦ Since February 2003, the Center for Effective Philanthropy (CEP) has conducted surveys of grantees on their perceptions of their philanthropic funders both on behalf of individual funders and independently. The purpose of these surveys is two-fold: to gather data that is useful to individual funders and to form the basis for broadly applicable research reports.¹

- ♦ **The Grantee Perception Report® (GPR) shows an individual philanthropic funder its grantee perceptions relative to a set of perceptions of other funders whose grantees were surveyed by CEP.**
 - Assessing funder performance is challenging and a range of data sources is required. The GPR provides one set of perspectives that can be useful in understanding philanthropic funder performance.
 - It is important to note that, on most questions, grantee ratings cluster toward the high end of an absolute scale. Grantee perceptions must be interpreted in light of the particular strategy of the funder.
 - The survey covers many areas in which grantees' perceptions might be useful to a philanthropic funder. Each funder should place emphasis on the areas covered according to the funder's specific priorities.
 - Low ratings in an area that is not core to a philanthropic funder's strategy may not be concerning. For example, a funder that does not focus efforts on public policy would likely receive lower than average ratings in this area if it is adhering to its strategy.
 - Finally, across most measures in this report, structural characteristics – such as funder type, asset size, focus, and age – are not strong predictors of grantee perceptions, suggesting that it is possible for all funders to attain high ratings from grantees.

Methodology – The Foundation’s Grantee Survey

- ◆ The Center for Effective Philanthropy (CEP) surveyed the grantees of Iowa West Foundation (“Iowa West”) during May and June 2012. The details of Iowa West’s survey are as follows:

Survey	Survey Period	Fiscal Year of Surveyed Grantees	Number of Grantees Surveyed	Number of Responses Received	Survey Response Rate ¹
Iowa West	May and June 2012	2011	118	88	75%

- ◆ Selected grantee comments are also shown throughout this report. This selection of comments highlights major themes and reflects trends in the data. These selected comments over-represent negative comments about the Foundation in order to offer a wide range of perspectives.
- ◆ The grantee feedback in this report was collected through CEP’s proprietary GPR survey. All individual grantee responses have been kept confidential: CEP does not report or share individual responses or identifying characteristics of survey respondents with funders. All comments are redacted to protect grantee confidentiality.

Methodology – Comparative Data

- Iowa West's average and/or median grantee ratings are compared to the average and/or median ratings from grantees in CEP's dataset, which contains data collected over the last nine years. Please see Appendix B for a list of all funders whose grantees CEP has surveyed.

Full Comparative Set	
Grantee Responses	41,459 grantees
Philanthropic Funders	284 funders

- Iowa West is also compared to a cohort of 31 regionally-focused funders. The group of 31 funders comprises the following funders:

Regionally-Focused Funders	
Alaska Mental Health Trust Authority	Lloyd A. Fry Foundation
Altman Foundation	Mary Reynolds Babcock Foundation
Amon G. Carter Foundation	New Hampshire Charitable Foundation
Blandin Foundation	Northwest Area Foundation
Bush Foundation	Pittsburgh Foundation
Champlin Foundations	Polk Bros. Foundation
Claude Worthington Benedum Foundation	Ralph M. Parsons Foundation
Colorado Trust	Richard M. Fairbanks Foundation
Dekko Foundation	Rochester Area Community Foundation
Gaylord and Dorothy Donnelley Foundation	Ruth Mott Foundation
George Gund Foundation	Skillman Foundation
Geraldine R. Dodge Foundation	Stuart Foundation
Gill Foundation	The Abell Foundation
Hartford Foundation for Public Giving	Virginia G. Piper Charitable Trust
James Graham Brown Foundation	Z. Smith Reynolds Foundation
Kansas Health Foundation	

- Within this report, CEP describes the comparison between Iowa West grantee ratings and grantee ratings of other funders based on the percentile rank of Iowa West. On measures with a 1-7 scale, grantee ratings for Iowa West are described as "above typical" or "above the median funder" when they fall above the 65th percentile, and "below typical" or "below the median funder" when they fall below the 35th percentile. Proportions of Iowa West grantees are described as "larger than typical" or "smaller than typical" when the proportion being referenced falls above or below the 65th or 35th percentile.

Grantmaking Characteristics

- ◆ This table is intended to provide context to the Foundation in thinking about its GPR results relative to its grantmaking practices. The information is based on self-reported data from grantees about the size, duration, and types of grants that they received.
- ◆ Compared to the typical funder, Iowa West awards smaller grants, a lower proportion of multi-year grants, and awards a larger than typical proportion of its grantees with types of support beyond program support and general operating support.

Survey Item	Iowa West	Full Dataset Median	Regionally-Focused Funder Median
Grant Size			
Median grant size	\$39K	\$60K	\$50K
Grant Length			
Average grant length	2.0 years	2.1 years	2.2 years
Percent of grantees receiving multi-year grants	33%	49%	47%
Type of Support			
Percent of grantees receiving operating support	8%	20%	21%
Percent of grantees receiving program/project support	69%	64%	64%
Percent of grantees receiving other types of support	23%	16%	15%

Note: CEP research indicates that grant size, type, or length alone are not key predictors of impact on grantees' organizations. For the full range of data on these survey items refer to Appendix B.

Structural Characteristics of Grantees

- ◆ This table is intended to provide context to the Foundation in thinking about its GPR results relative to the structural characteristics of its grantees. The information is based on self-reported data from grantees about the characteristics of their organizations.
- ◆ Compared to grantees of the typical funder, Iowa West grantee organizations are older, though they are a similar size.

Survey Item	Iowa West	Full Dataset Median	Regionally-Focused Funder Median
Budget of Funded Organizations			
Typical organizational budget	\$1.1MM	\$1.4MM	\$1.1MM
Duration of Funded Program and Grantee Organization			
Programs conducted 6 years or more	40%	33%	37%
Median length of establishment of grantee organizations	36 years	24 years	24 years

Note: In most cases, the structural characteristics of grantees are not strong predictors of how grantees perceive funders, suggesting that it is possible for funders with even a unique set of grantees to attain high ratings. For additional information on grantee characteristics related to these survey items refer to Appendix B.

Structural Characteristics of Funders

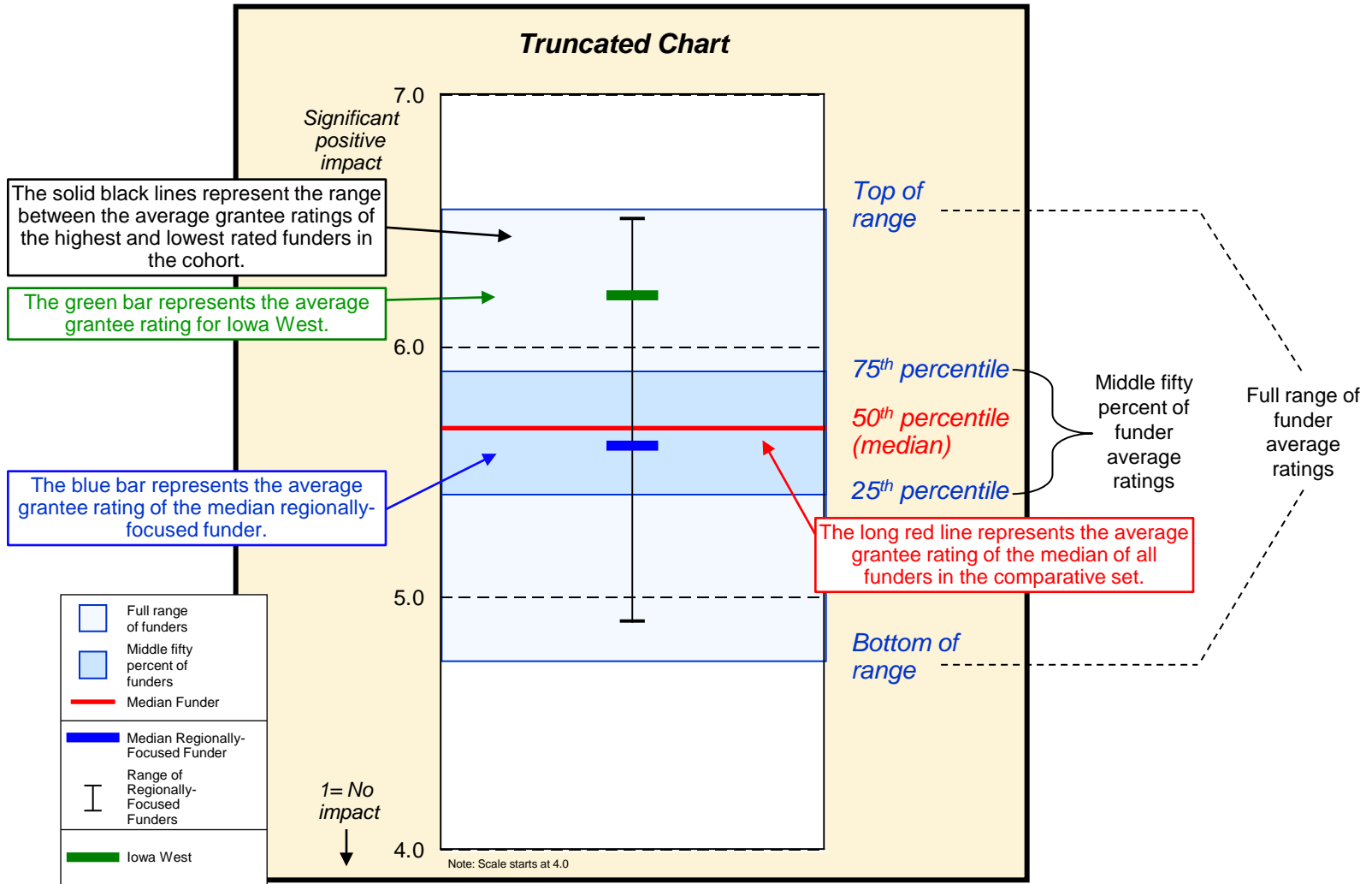
- This table is intended to provide context to the Foundation in thinking about its GPR results relative to its grantmaking and staffing. This information is based on IRS filings and data supplied by philanthropic funders that have subscribed to the GPR.
- The number of grants processed and managed per program staff full-time employee at Iowa West is larger than that of the typical funder.

Survey Item	Iowa West	Full Dataset Median	Regionally-Focused Funder Median
Program Staff Load			
Dollars awarded per program staff full-time employee	\$5.2MM	\$2.5MM	\$2.7MM
Applications per program full-time employee	76 applications	27 applications	29 applications
Grants awarded per program full-time employee	52 grants	19 grants	22 grants
Active grants per program full-time employee	117 grants	31 grants	30 grants

Note: Funders of different sizes and focuses choose to structure their organizations differently – so, as with all the information contained in this report, the Foundation should interpret data in this section in light of its distinctive goals and strategy. For additional information on funder characteristics related to these survey items refer to Appendix B.

Reading GPR Charts

Much of the grantee perception data in the GPR is presented in the format below. These graphs show the average of grantee responses for Iowa West, over a background that shows percentiles for the average ratings for the full comparative set of 284 philanthropic funders. **Throughout the report, many charts in this format are truncated from the full scale because funder averages fall within the top half of the absolute range.**



Foundation Descriptors

“At this point in time, what is one word that best describes the Foundation?”

Note: The size of each word indicates the frequency with which it was written by grantees.



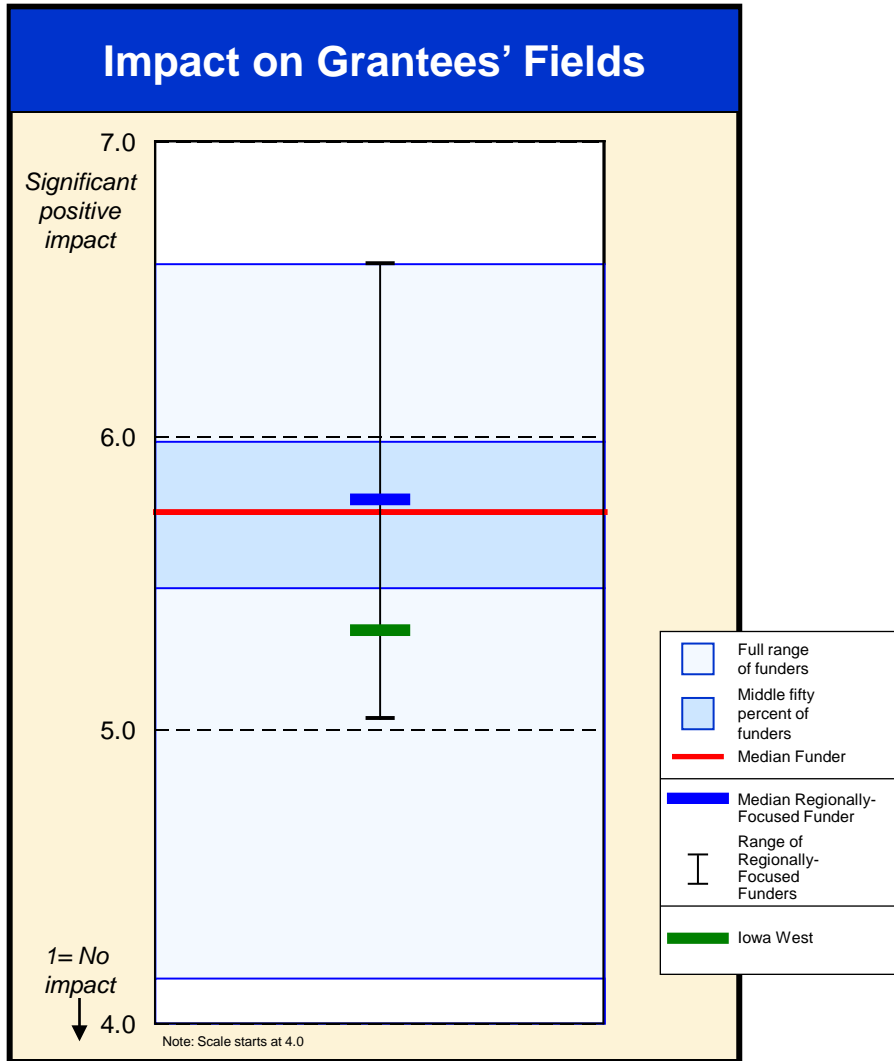
Note: The above “word cloud” was produced using a free tool available at www.wordle.net. Images created by the Wordle.net web application are licensed under a Creative Commons Attribution 3.0 United States License.

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Impact on Grantees' Fields

On impact on grantees' fields, Iowa West is rated:

- below 84 percent of funders
- below 94 percent of regionally-focused funders in the cohort



Selected Grantee Comments

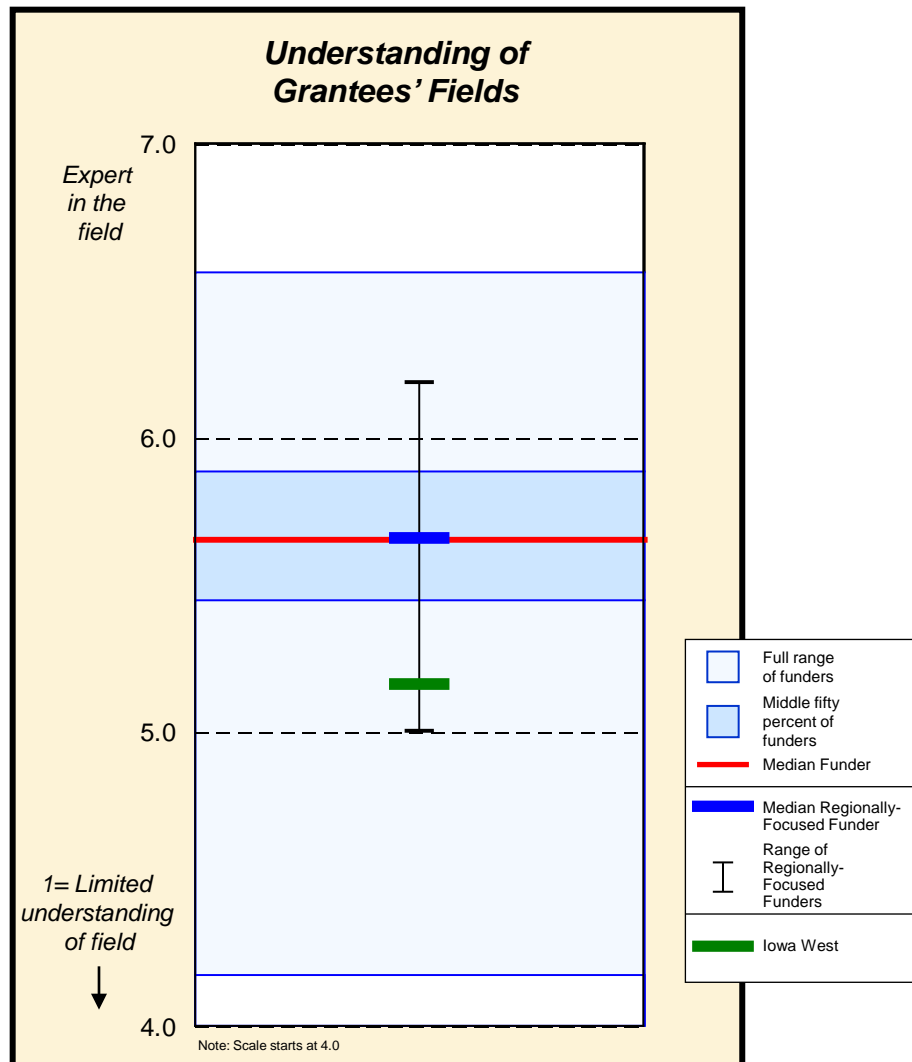
- ◆ “[Iowa West has a] good grasp of essentials of best practice in our field.”
- ◆ “We are involved in the arts and in human services to seniors, which have become less of a priority for the Foundation, so their impact has been decreased in recent years.”
- ◆ “IWF is having a great impact on the arts and art education with its Iowa West Public Art program.”
- ◆ “Iowa West has had little impact (other than funding) on our field. Our visions shared with them have been met with rebukes and patronization. This has been disappointing.”
- ◆ “The Foundation has contributed significantly to the arts in Council Bluffs, particularly the visual arts.”

Note: This question includes a “don’t know” response option; 3 percent of Iowa West respondents answered “don’t know”, compared to 8 percent at the median funder, and 6 percent of respondents at the median regionally-focused funder.

Understanding of Grantees' Fields

On understanding of grantees' fields, Iowa West is rated:

- below 91 percent of funders
- below 97 percent of regionally-focused funders in the cohort



Note: This question includes a "don't know" response option; 10 percent of Iowa West respondents answered "don't know", compared to 6 percent at the median funder, and 5 percent of respondents at the median regionally-focused funder.

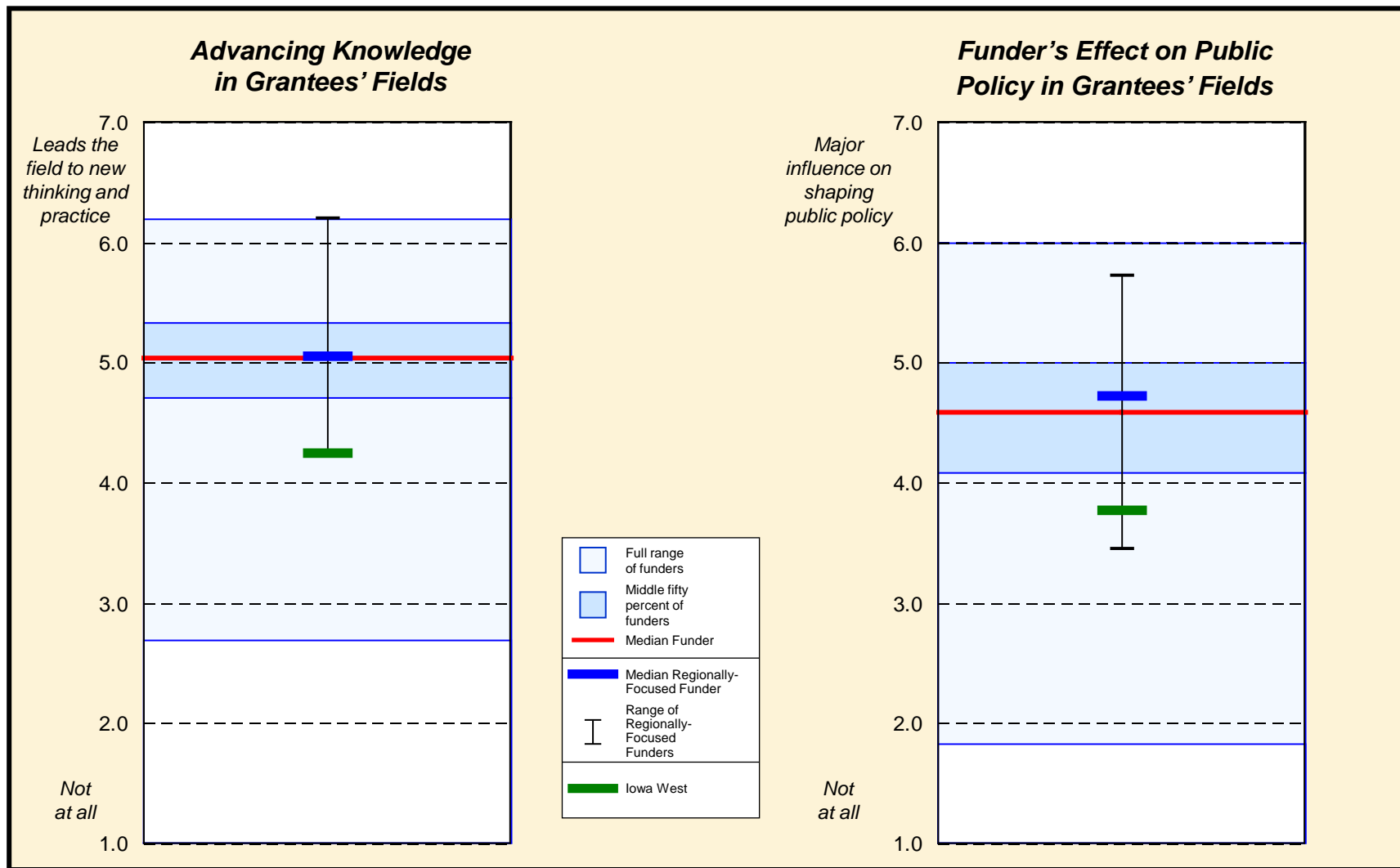
Advancing Knowledge in Fields and Effect on Public Policy

On advancement of knowledge in grantees' fields, Iowa West is rated:

- below 90 percent of funders
- lower than all other regionally-focused funders in the cohort

On effect on public policy in grantees' fields, Iowa West is rated:

- below 85 percent of funders
- below 94 percent of regionally-focused funders in the cohort

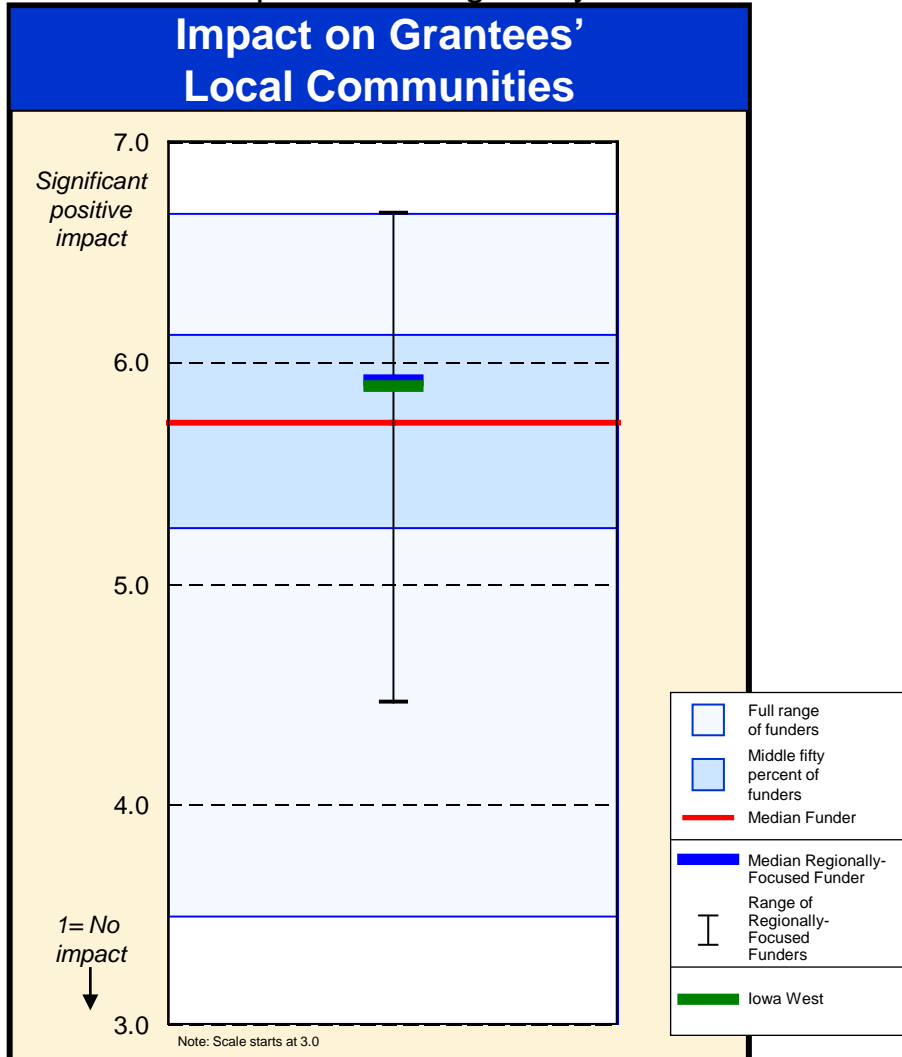


Note: The questions depicted on these charts include a "don't know" response option. In the left-hand chart, 20 percent of Iowa West respondents answered "don't know", compared to 23 percent at the median funder, and 20 percent of respondents at the median regionally-focused funder. In the right-hand chart, 37 percent of Iowa West respondents answered "don't know", compared to 37 percent at the median funder, and 31 percent of respondents at the median regionally-focused funder.

Impact on Grantees' Local Communities

On impact on grantees' local communities, Iowa West is rated:

- above 60 percent of funders
- below 55 percent of regionally-focused funders in the cohort



Selected Grantee Comments

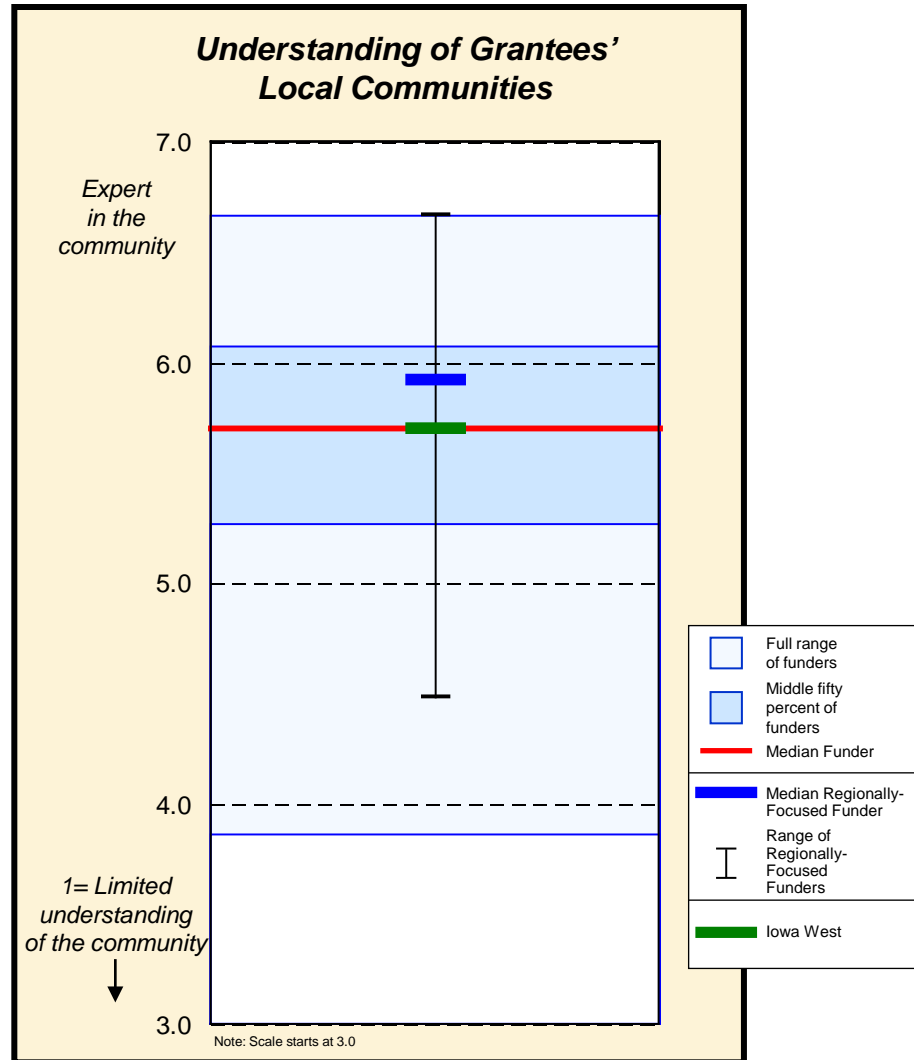
- ♦ *“Iowa West has allowed our community to complete projects that we otherwise would not have been able to afford.”*
- ♦ *“Iowa West has had a beneficial impact on the community, supporting worthwhile programs and making the community stronger.”*
- ♦ *“Iowa West is committed to bettering the community. This grant ensured that we, as a nonprofit, can better our community by enhancing the lives of those less fortunate.”*
- ♦ *“Their knowledge of the Council Bluffs community is top notch. And they are leaders in conducting research on the state of their community and the needs of their community.”*

Note: This question includes a “don’t know” response option; 3 percent of Iowa West respondents answered “don’t know”, compared to 10 percent at the median funder, and 6 percent of respondents at the median regionally-focused funder. Chart does not show data from two funders whose community impact rating is less than 3.0.

Understanding of Grantees' Local Communities

On understanding of grantees' local communities, Iowa West is rated:

- at the median
- below 68 percent of regionally-focused funders in the cohort



Note: This question includes a "don't know/not applicable" response option; 9 percent of Iowa West respondents answered "don't know/not applicable", compared to 12 percent at the median funder, and 9 percent of respondents at the median regionally-focused funder.

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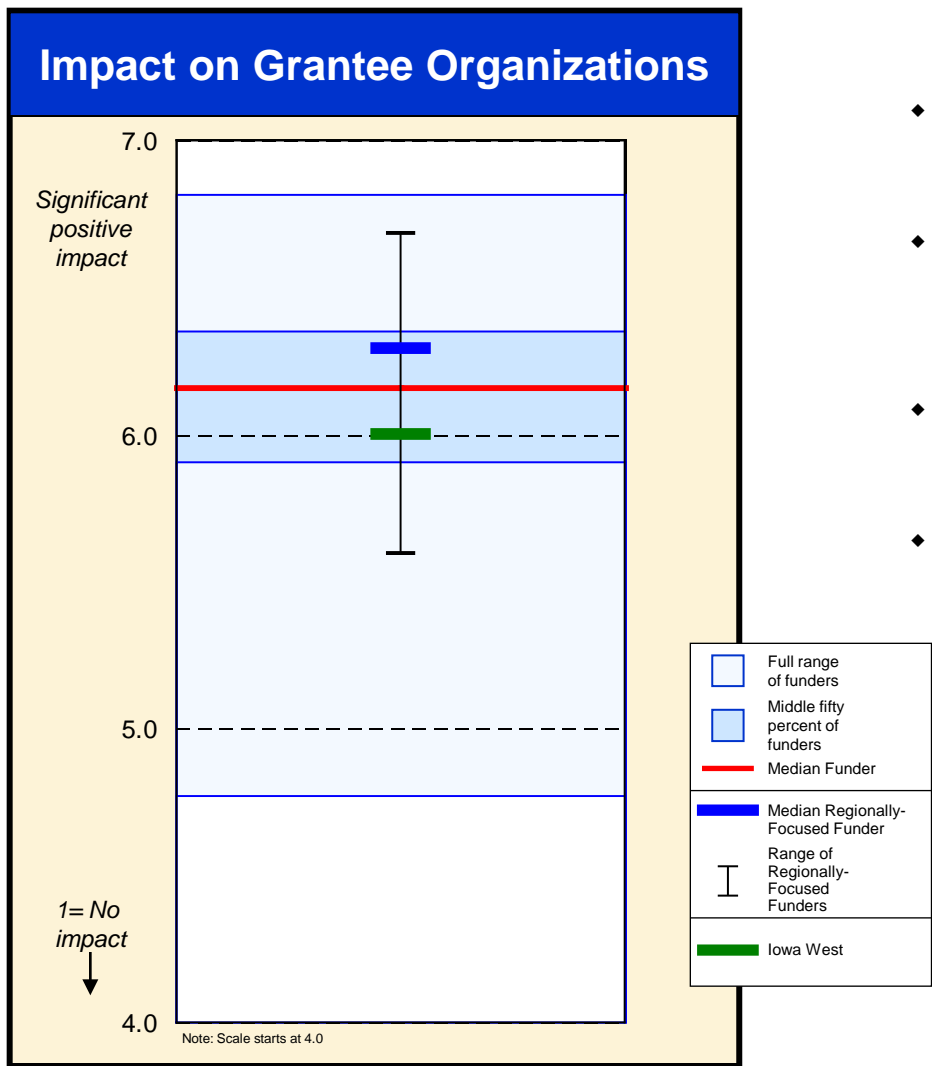
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Impact on Grantee Organizations

On impact on grantee organizations, Iowa West is rated:

- below 65 percent of funders
- below 71 percent of regionally-focused funders in the cohort



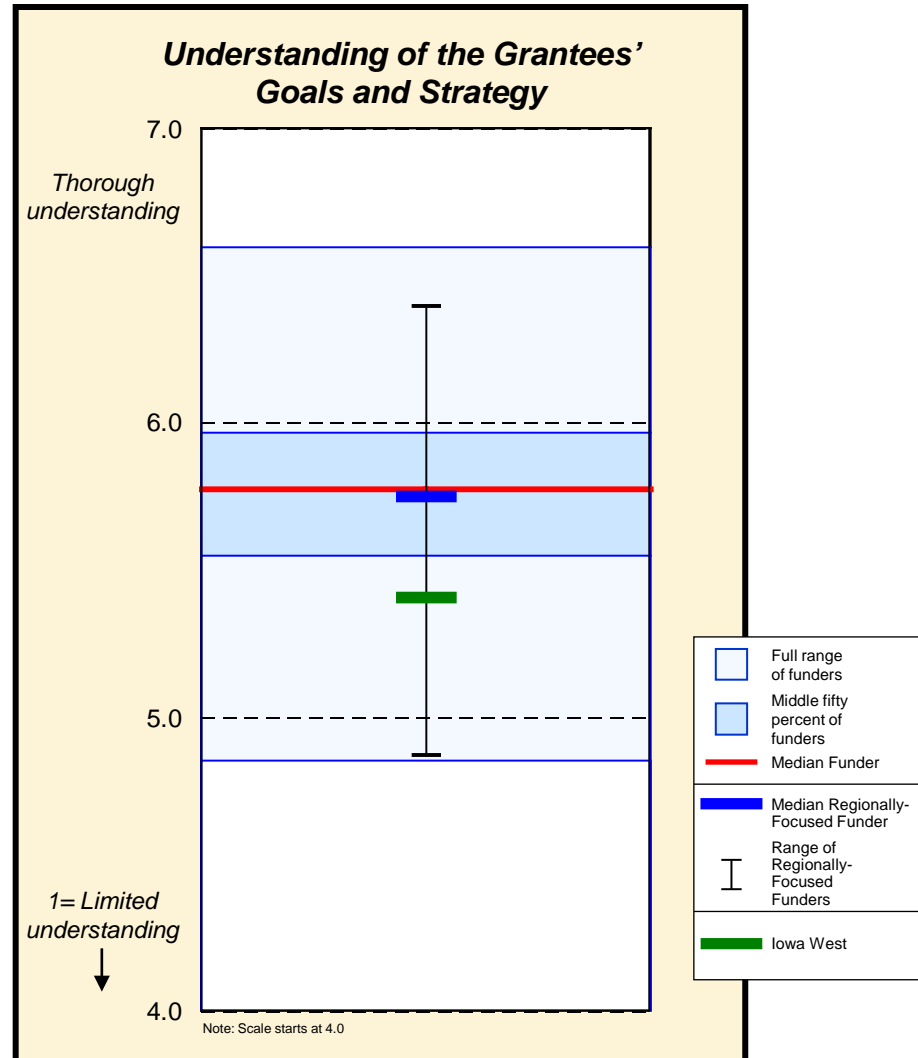
Selected Grantee Comments

- ♦ *“Iowa West's investment in our organization has provided credibility and trust in the services we provide throughout Southwest Iowa. There was great media coverage.”*
- ♦ *“The Iowa West Foundation grant allowed our organization to reach more children with educational programming in [our region], and create a sustainable model for expanding the program.”*
- ♦ *“The funding to [our organization's] programs has been significant. As a fairly new organization, we would not still be in business without their support.”*
- ♦ *“The Iowa West Foundation is allowing [our organization] to continue its valuable work.... It is generous of the Iowa West Foundation to provide funding opportunities to nonprofit organizations in surrounding counties in Nebraska.”*

Understanding of Grantees' Goals and Strategy

On understanding of grantees' goals and strategy, Iowa West is rated:

- below 85 percent of funders
- below 84 percent of regionally-focused funders in the cohort

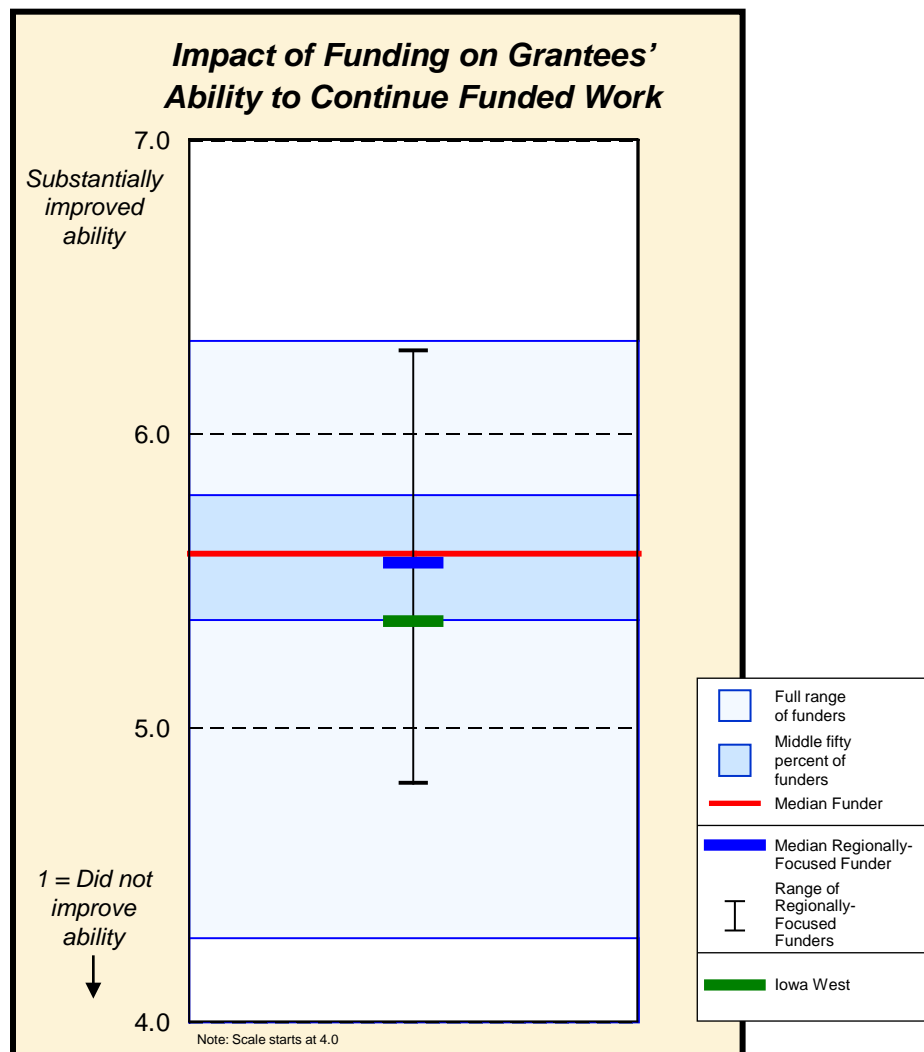


Note: This question includes a "don't know" response option; 6 percent of Iowa West respondents answered "don't know", compared to 6 percent at the median funder, and 4 percent of respondents at the median regionally-focused funder.

Impact on Sustainability of Funded Work

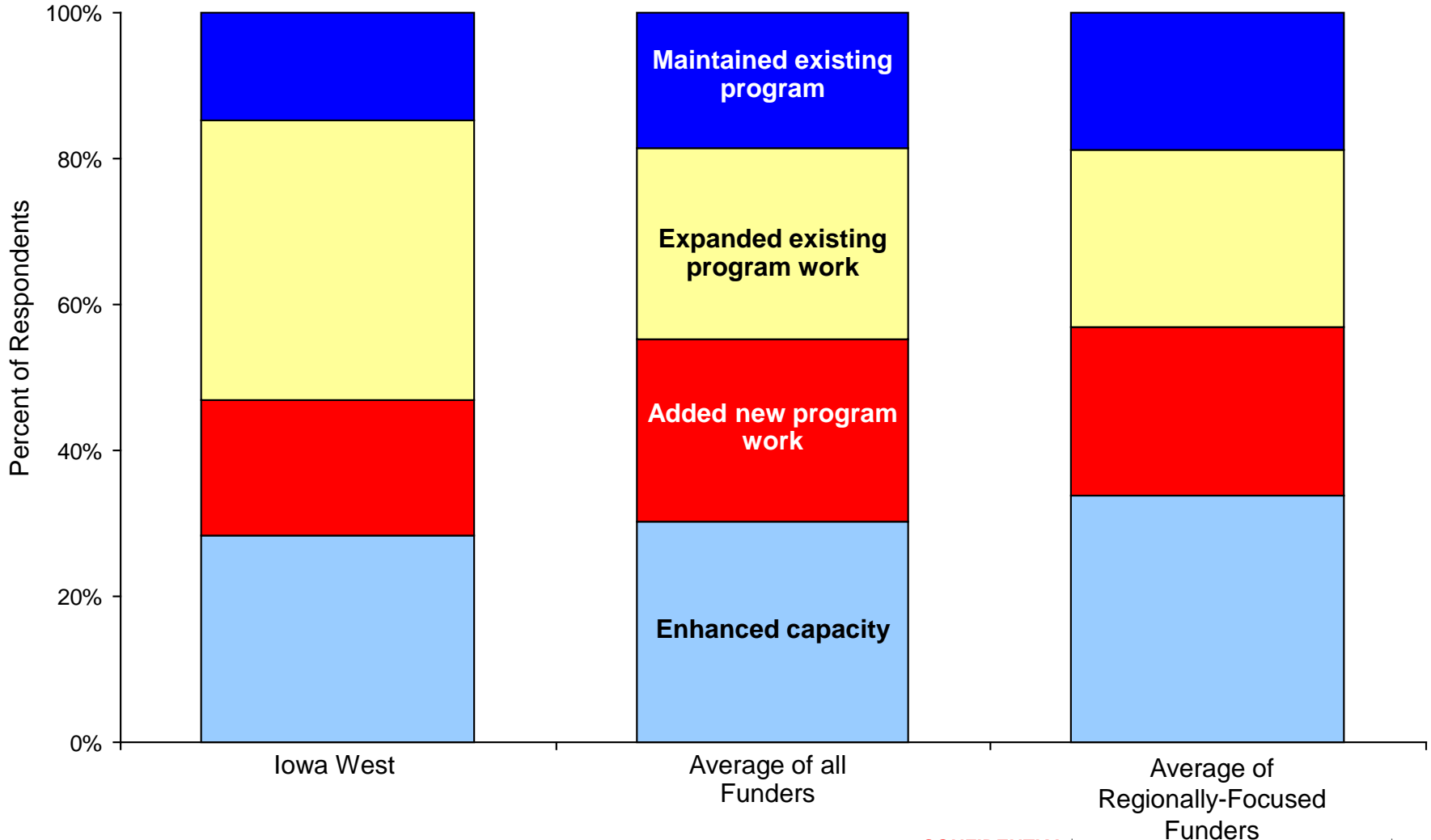
On the effect of the Foundation's funding on grantees' ability to sustain the work funded by the grant in the future, Iowa West is rated:

- below 76 percent of funders
- below 75 percent of regionally-focused funders in the cohort



Note: This question includes a "don't know/not applicable" response option; 7 percent of Iowa West respondents answered "don't know/not applicable", compared to 8 percent at the median funder, and 7 percent of respondents at the median regionally-focused funder.

Primary Effect of Grant on Grantee's Organization



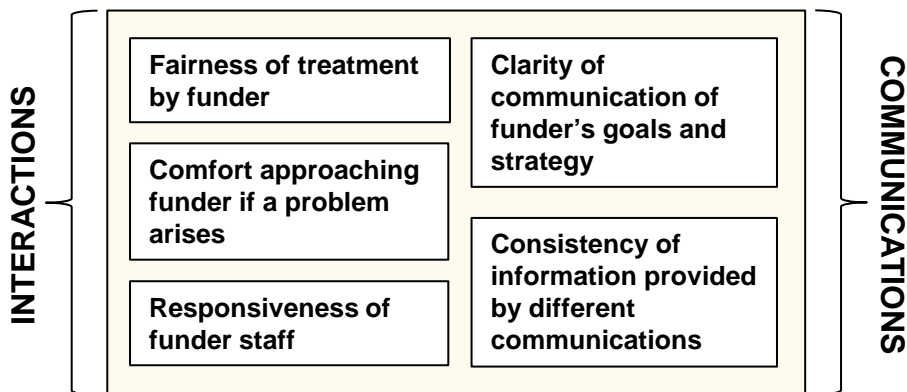
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Funder-Grantee Relationships Summary

On this summary of key components of funder-grantee relationships, Iowa West is rated:

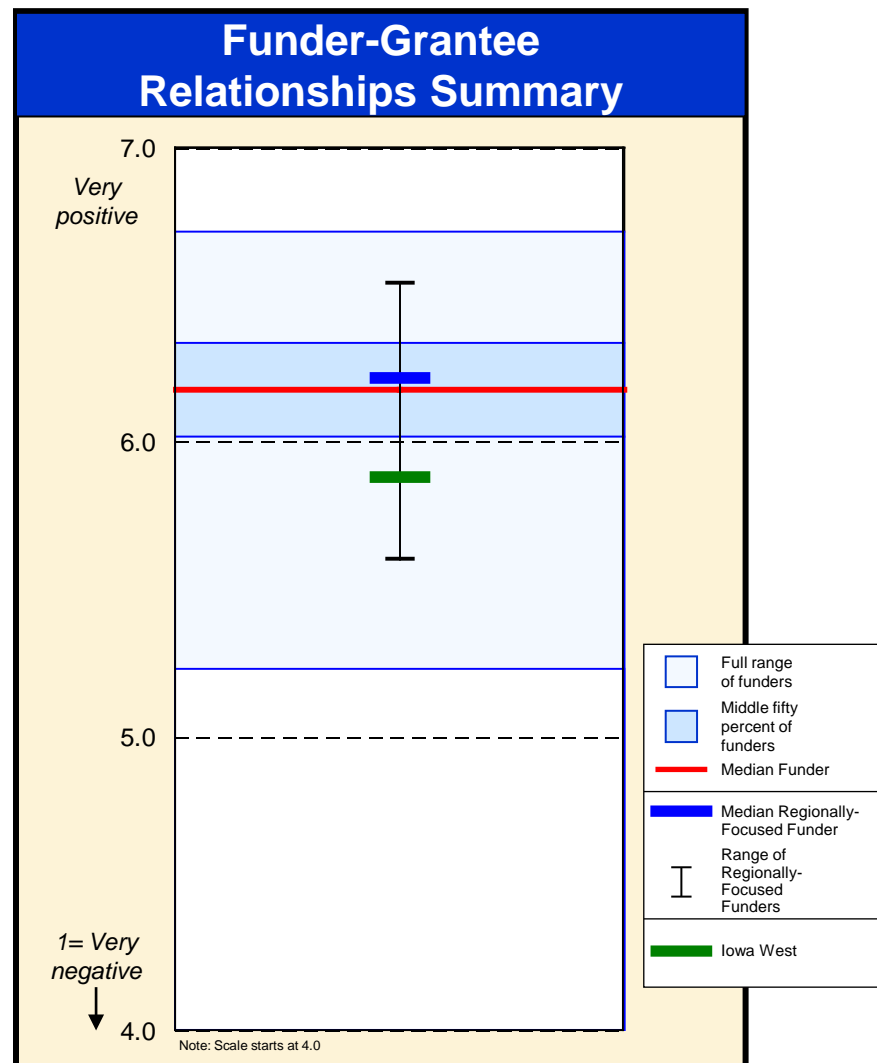
- below 88 percent of funders
- below 96 percent of regionally-focused funders in the cohort

Key Components of Funder-Grantee Relationships Measure



Survey-Wide Analysis Fact: What best predicts grantee ratings on the *Funder-Grantee Relationships Summary*? 1) *Understanding*: Understanding of funded organizations' goals and strategies; 2) *Selection*: Helpfulness of selection process and mitigation of pressure to modify priorities; 3) *Expertise*: Understanding of fields and communities; 4) *Contact*: Initiation of contact and with appropriate frequency. For more on these findings and resulting management implications, please see CEP's report, *Working with Grantees: The Keys to Success and Five Program Officers Who Exemplify Them*.

Note: Index created by averaging grantee ratings of comfort approaching the Foundation if a problem arises, responsiveness of the Foundation staff, fairness of the Foundation's treatment of grantees, clarity of communication of the Foundation's goals and strategy, and the consistency of information provided by different communication resources. The data above reflects only the responses of grantees who answered all five of these questions.



Interactions Measures

On fairness of treatment of grantees, Iowa West is rated:

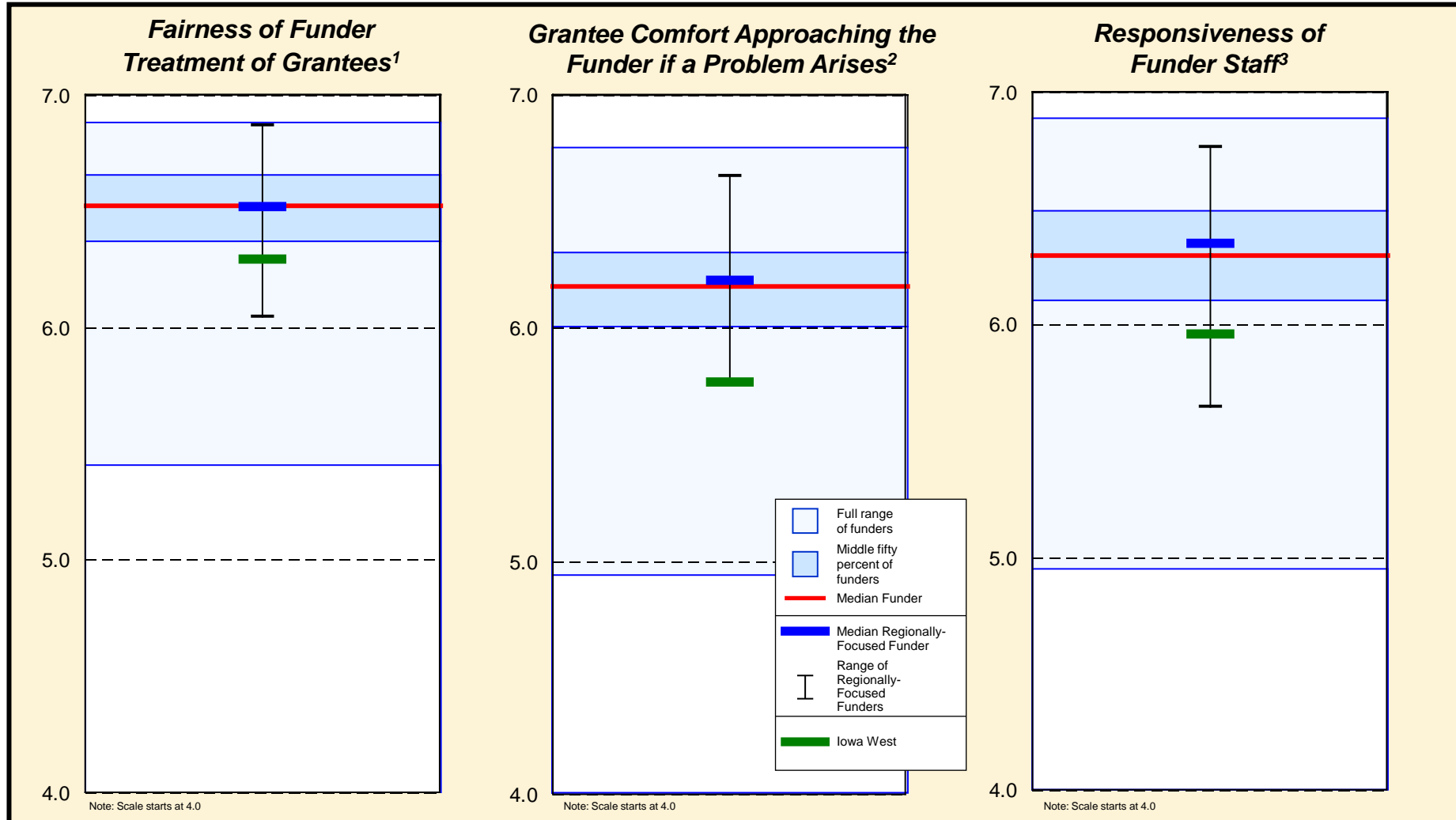
- below 84 percent of funders
- below 94 percent of regionally-focused funders in the cohort

On grantees' comfort in approaching the Foundation if a problem arises, Iowa West is rated:

- below 93 percent of funders
- lower than all other regionally-focused funders in the cohort

On responsiveness of Foundation staff to grantees, Iowa West is rated:

- below 85 percent of funders
- below 90 percent of regionally-focused funders in the cohort



1: Scale goes from 1 = Not at all fairly to 7 = Extremely fairly.
 2: Scale goes from 1 = Not at all comfortable to 7 = Extremely comfortable.
 3: Scale goes from 1 = Not at all responsive to 7 = Extremely responsive.

Selected Grantee Comments

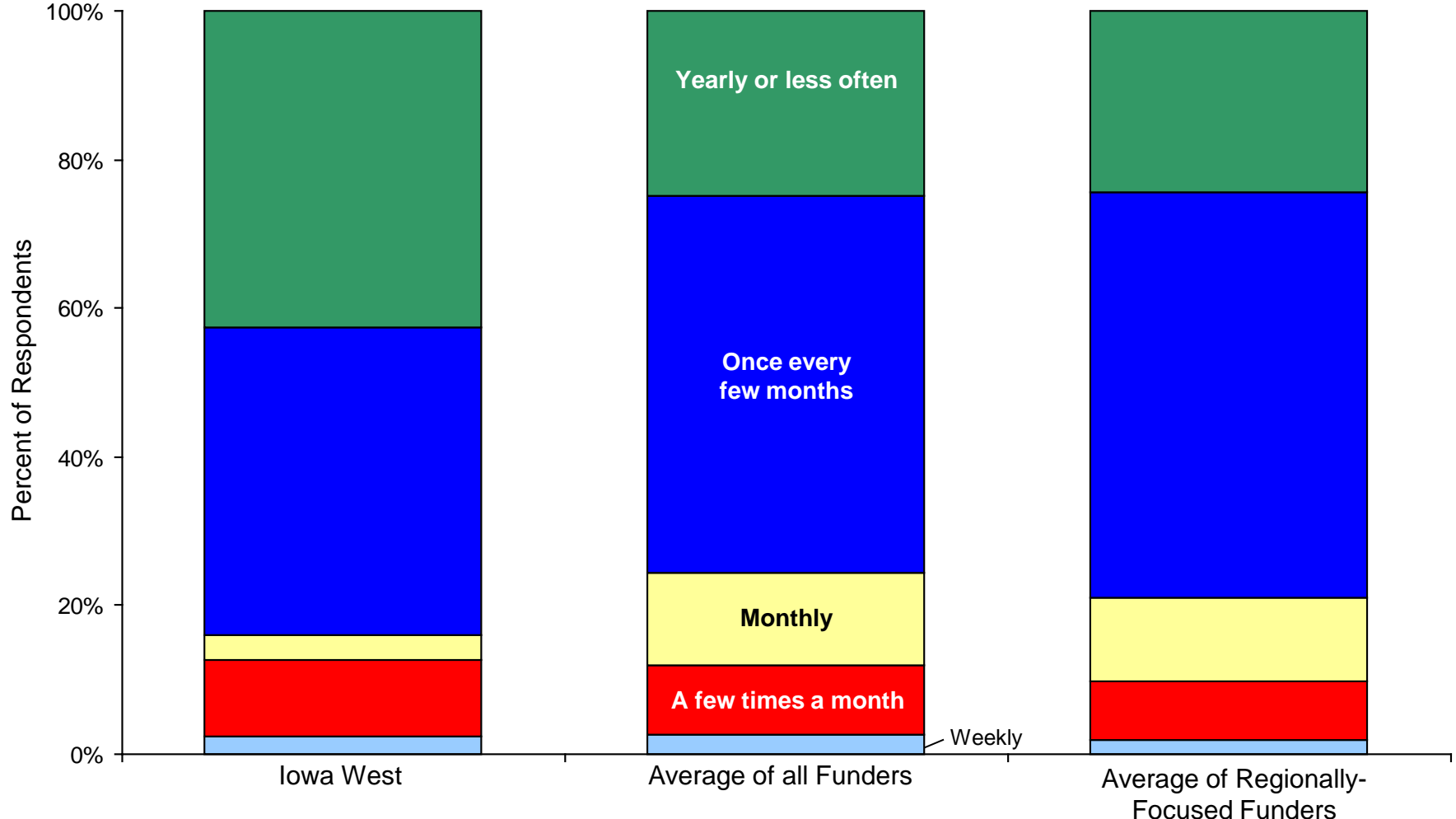
- ♦ *“Discussions are very rigid and are conducted in an authoritative manner.”*
- ♦ *“All interactions have been positive. Feedback has been of great assistance, especially in preparing applications.”*
- ♦ *“As a newer organization new to grant-seeking, we've learned more about the process from Iowa West than anyone. Their efforts are consistently to help community groups build better communities. The Iowa West staff is accessible, amiable and professional. I am completely comfortable about seeking their help and working with them. They do a great job.”*
- ♦ *“Foundation staff did not seem inclined to help. I emailed a specific question about the Foundation's priorities and how our program could fit into two different priorities and received no answer to the question, just a reply saying the information was on the website. I had obviously looked at the website already. It was a rather discouraging exchange.”*
- ♦ *“No one at the Foundation ever answers their phones or their email.... This is the most unresponsive funder I have ever interacted with.”*

Frequency of Interactions

The proportion of Iowa West grantees that report interacting with their program officer yearly or less often is:

- larger than that of 81 percent of funders
- larger than that of 87 percent of regionally-focused funders in the cohort

Frequency of Grantee Contact with Program Officer During Grant



Proportion of grantees that interact with their PO yearly or less often¹

43%

19%

21%

1: The proportion shown for "Average of all Funders" and "Average of Regionally-Focused Funders" is a median.

Initiation of Interactions

The proportion of Iowa West grantees that report that they most frequently initiate interactions with the Foundation is:

- larger than that of 92 percent of funders
- larger than that of 88 percent of regionally-focused funders in the cohort

Initiation of Grantee Contact with Program Officer During Grant

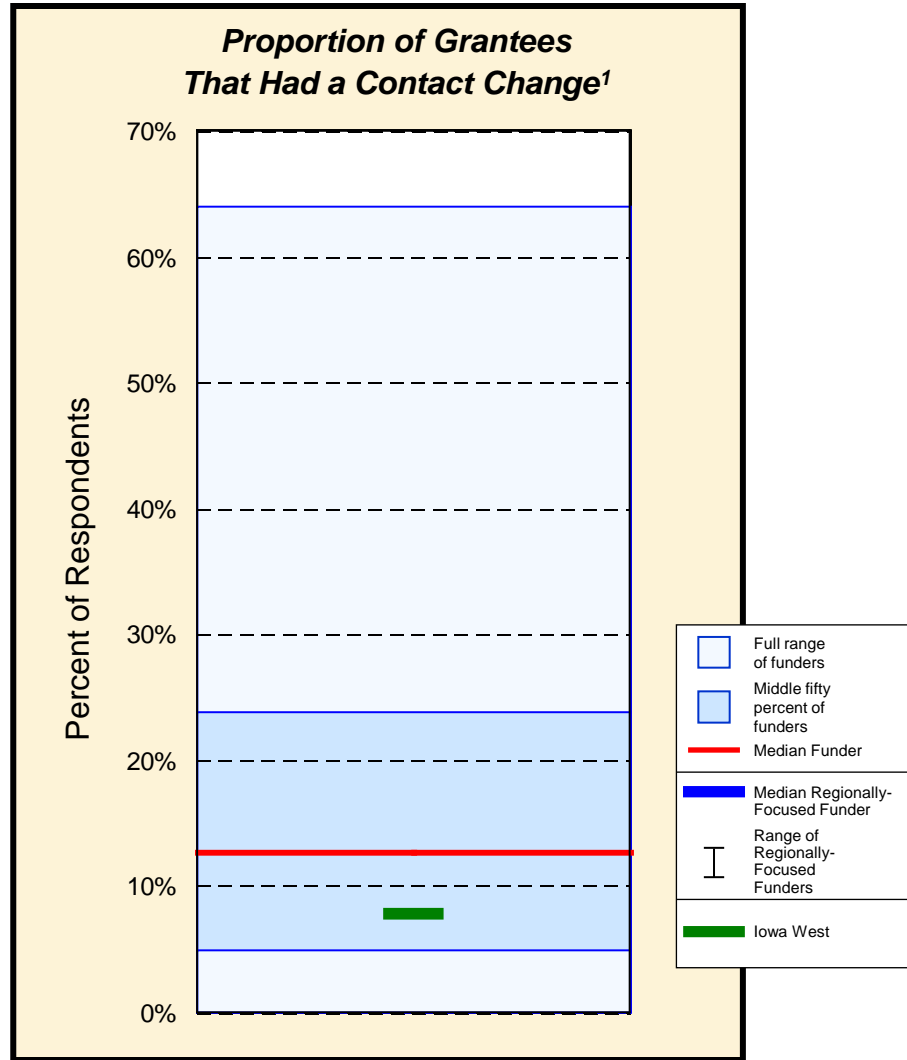


1: The proportion shown for "Average of all Funders" and "Average of Regionally-Focused Funders" is a median.

Proportion of Grantees That Had a Change in Primary Contact

The proportion of Iowa West grantees who had a change in their primary contact in the last six months is:

- smaller than that of 65 percent of funders



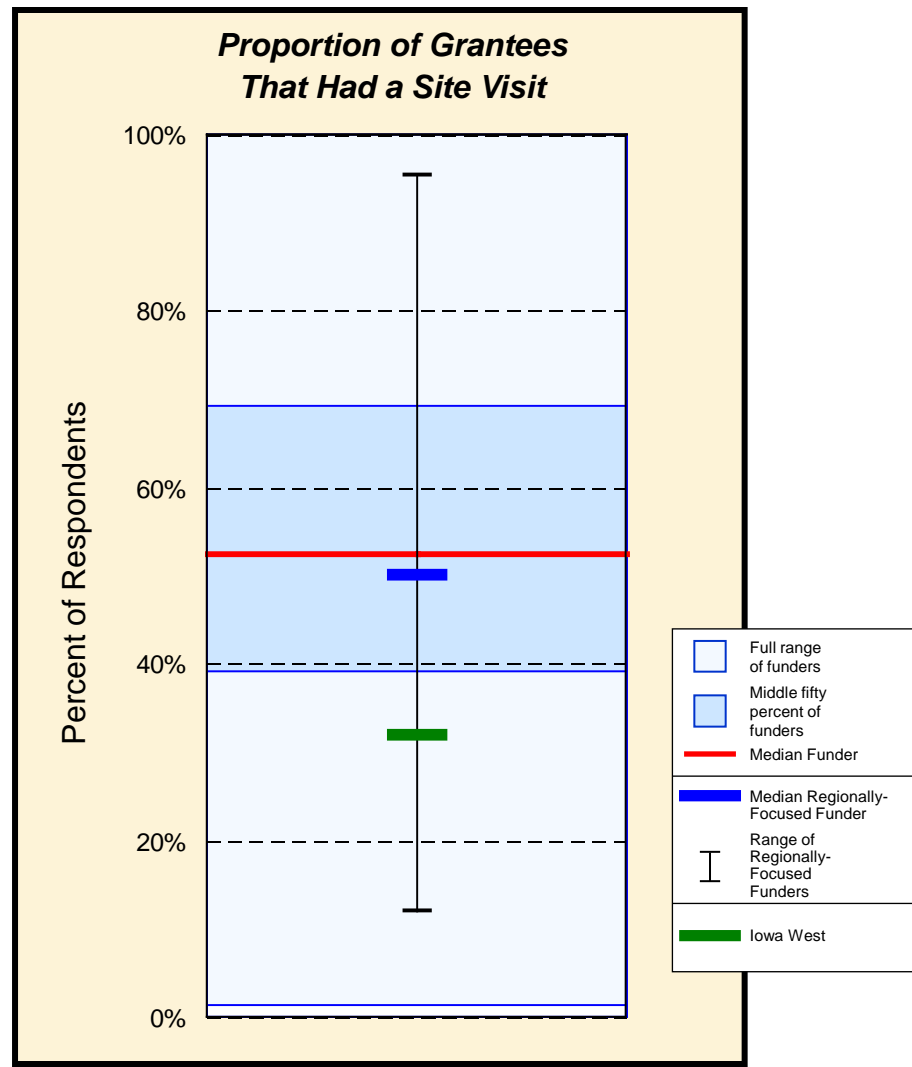
Note: Regionally-focused funder data not available due to changes to the survey instrument.

1: Represents data from 116 funders.

Proportion of Grantees That Had a Site Visit

The proportion of Iowa West grantees receiving a site visit during the course of the grant is:

- smaller than that of 87 percent of funders
- smaller than that of 92 percent of regionally-focused funders in the cohort



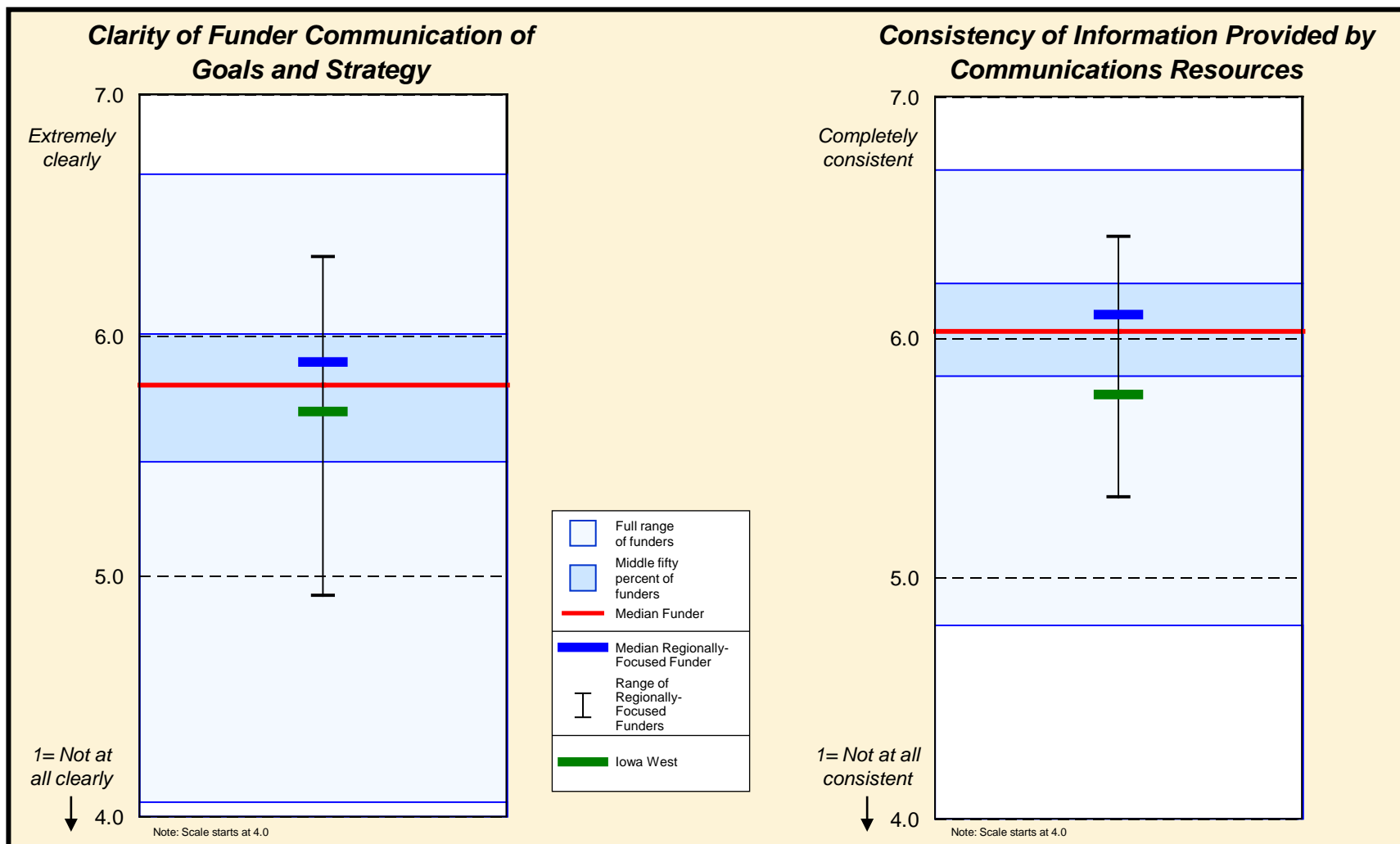
Communications Measures

On clarity of the Foundation's communication of its goals and strategy, Iowa West is rated:

- below 58 percent of funders
- below 71 percent of regionally-focused funders in the cohort

On consistency of the Foundation's communications resources, both personal and written, Iowa West is rated:

- below 81 percent of funders
- below 89 percent of regionally-focused funders in the cohort

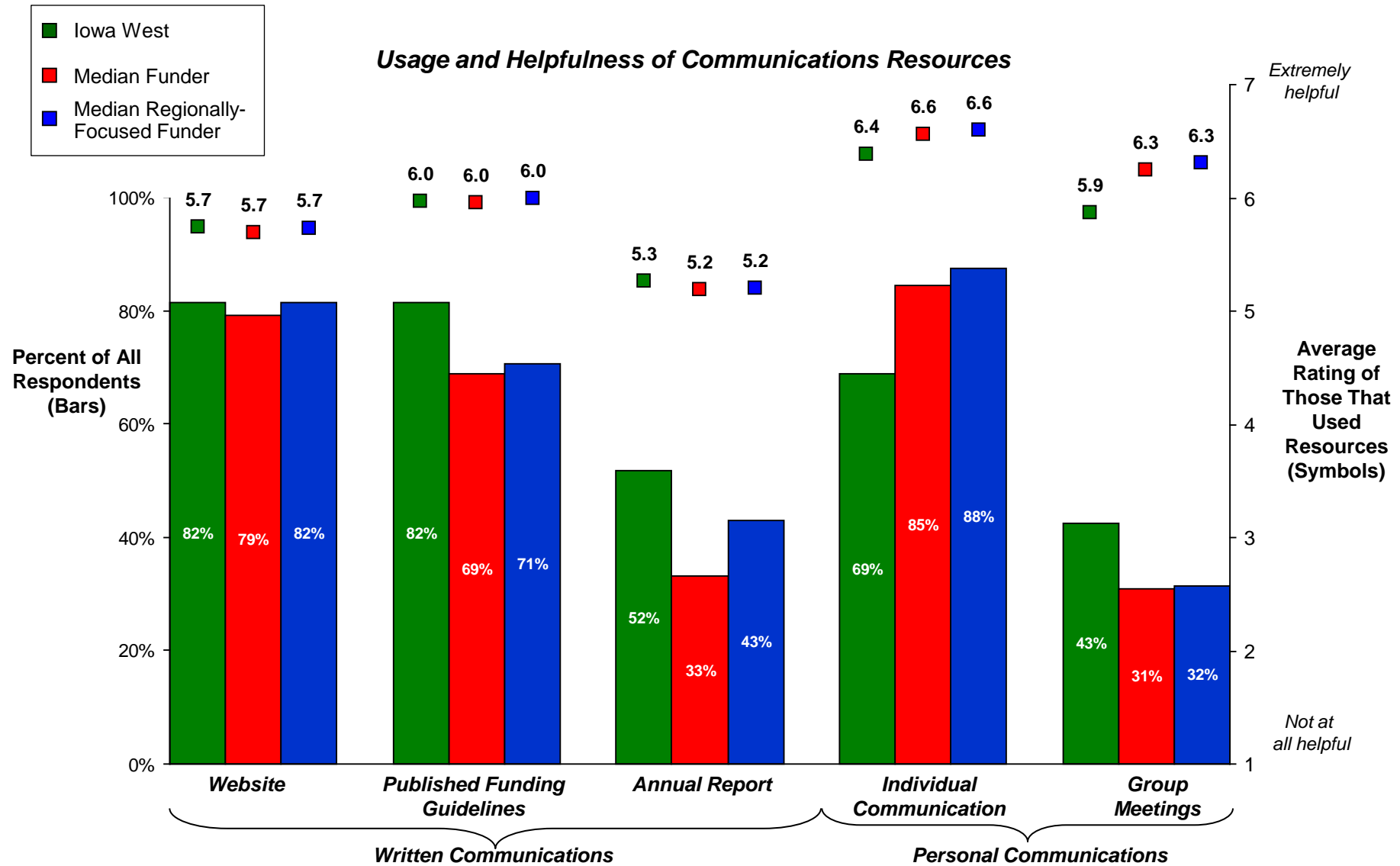


Note: In the right-hand chart, this question includes a "used one or no resources" response option; 3 percent of Iowa West respondents indicated they had used one or no resources, compared to 4 percent at the median funder, and 3 percent of respondents at the median regionally-focused funder.

Selected Grantee Comments

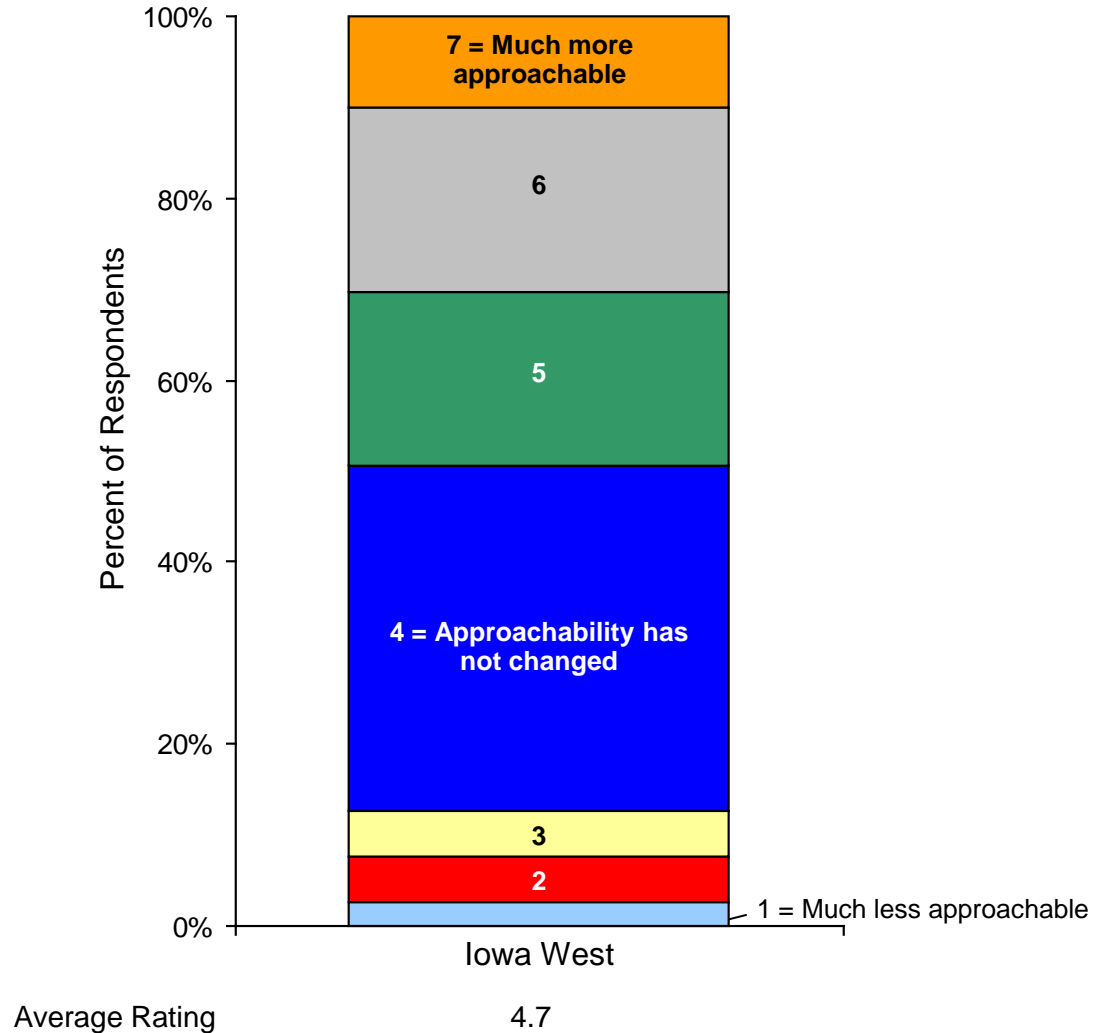
- ♦ *“Iowa West Foundation is very ‘user-friendly.’ Information is easy to find and clearly stated.”*
- ♦ *“It also seems that they aren’t consistent with their wording on outcomes, outputs, strategies, activities, etc. Those need to be consistent throughout the application process or it is confusing. I feel there are some staff who are not professional or appropriate in their communication to potential grantees.”*
- ♦ *“They clearly communicate their priorities and were helpful during a transition of upper management at our organization. It might be good to hear from them more often than we do and not just at the time the grant is awarded and when the impact report is due.”*
- ♦ *“[Previously] we ...received inconsistent messages from senior staff, project staff, and local board members regarding the direction our projects were going. During and since the CEO transition, however, messaging appears to be much more consistent, which we welcome.”*

Communications Resources



Foundation Approachability

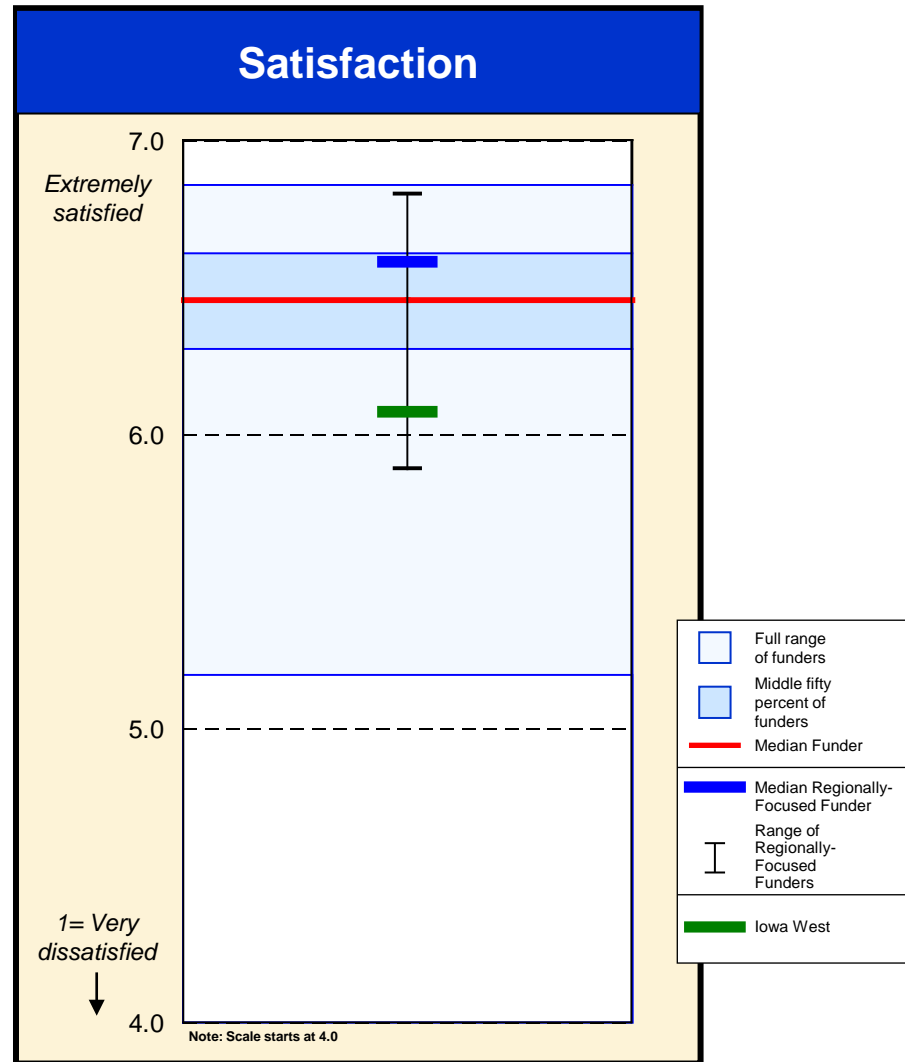
Grantees were asked about how the Foundation's approachability has changed in recent years. Thirty-eight percent of grantees indicate the Foundation's approachability has not changed.



Note: Comparative data not available because this question was only asked of Iowa West grantees.

Overall Satisfaction

Grantees were asked about their overall satisfaction with the Foundation.



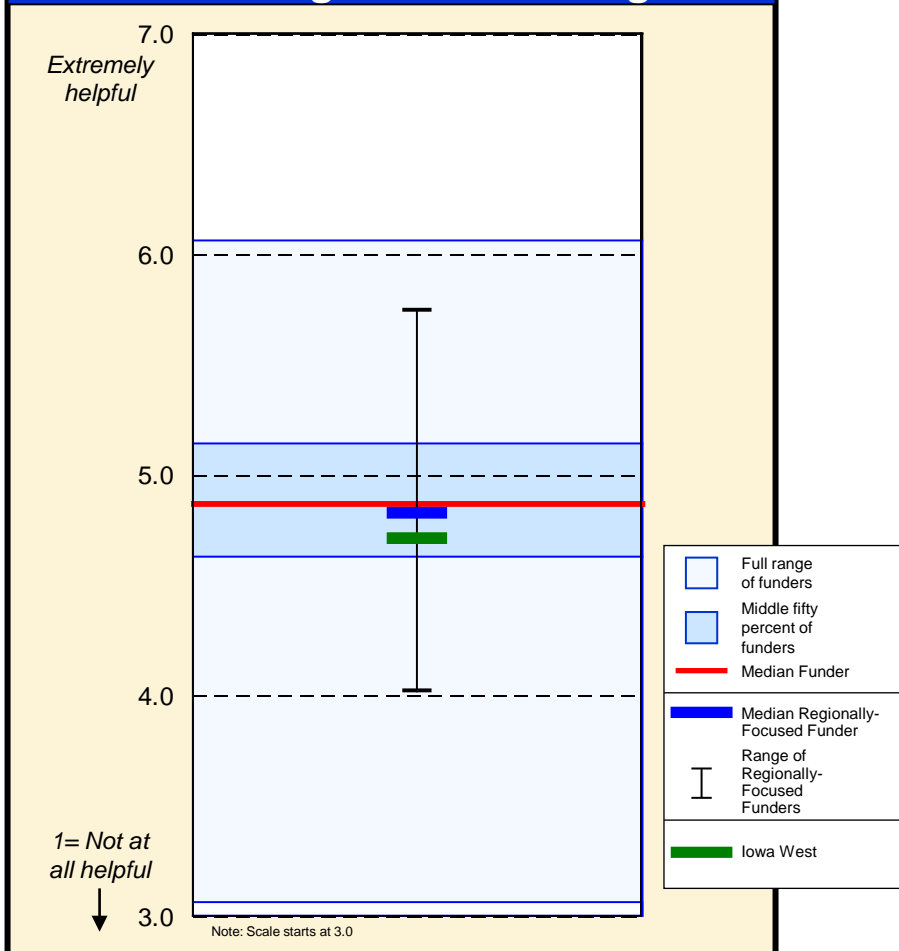
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Helpfulness of Selection Process

On helpfulness of the Foundation's selection process in strengthening funded organizations/programs, Iowa West is rated:

- below 70 percent of funders
- below 80 percent of regionally-focused funders in the cohort

Helpfulness of the Selection Process to Organizations/Programs



Selected Grantee Comments

- ♦ *“The application process, though time-consuming, was very thorough and I utilize many of my answers in other grants I've drafted because of this.”*
- ♦ *“Application questions seem redundant.”*
- ♦ *“I think the process is very easy and straightforward. If we did run into an issue, we felt comfortable enough to contact the agency.”*
- ♦ *“The problem is the IWF decision to fund seems very arbitrary. The rules seem to bend at the whim of IWF. Also there is a tendency to micromanage the goals of the grant request (not process but goals).”*
- ♦ *“Website application process is difficult to fit program/project into.”*
- ♦ *“The application can be time-consuming, but the process is well-defined and easy to understand.”*

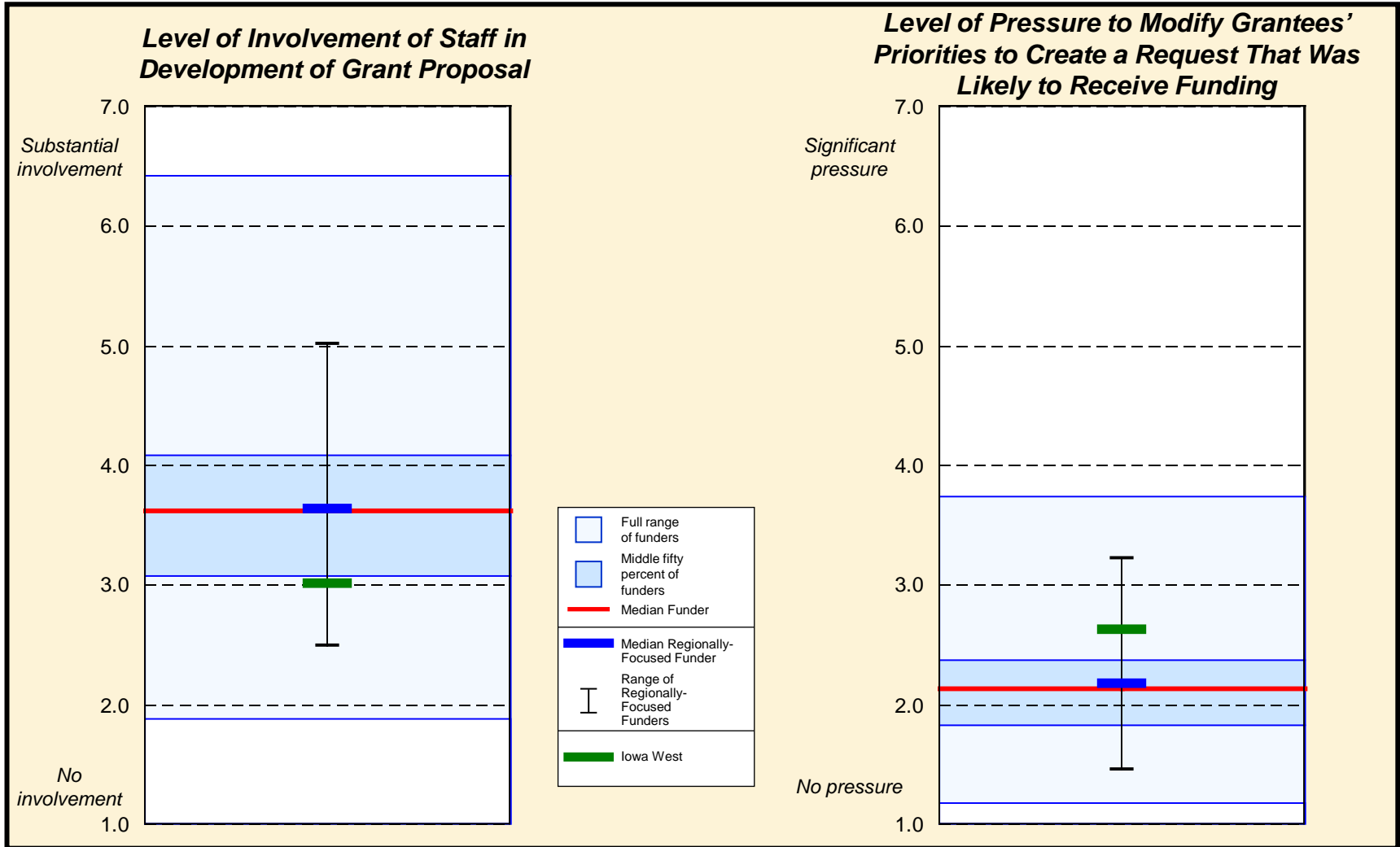
Funder Involvement and Pressure in Selection Process

On the level of involvement in the development of grantees' proposals, Iowa West is rated:

- below 79 percent of funders
- below 83 percent of regionally-focused funders in the cohort

On the level of pressure grantees feel to modify their priorities to create a proposal that was likely to receive funding, Iowa West is rated:

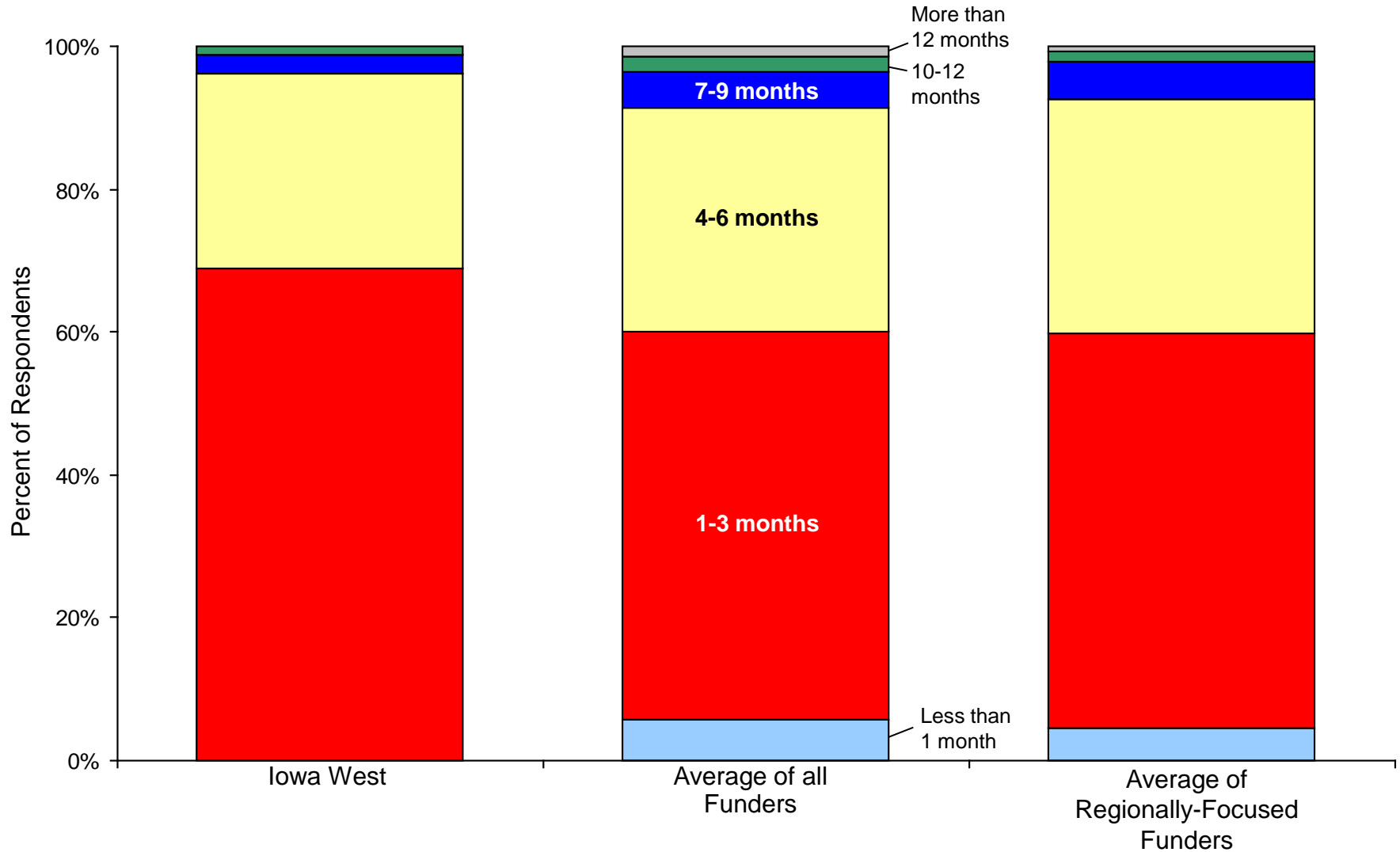
- above 89 percent of funders
- above 93 percent of regionally-focused funders in the cohort



Note: These questions were only asked of those grantees that had submitted a proposal for their grant by the time they took the survey. For Iowa West, 95 percent of grantees indicated they submitted a proposal for their grant by the time they took the survey, compared to 95 percent at the median funder, and 95 percent of respondents at the median regionally-focused funder.

Time Between Submission and Clear Commitment

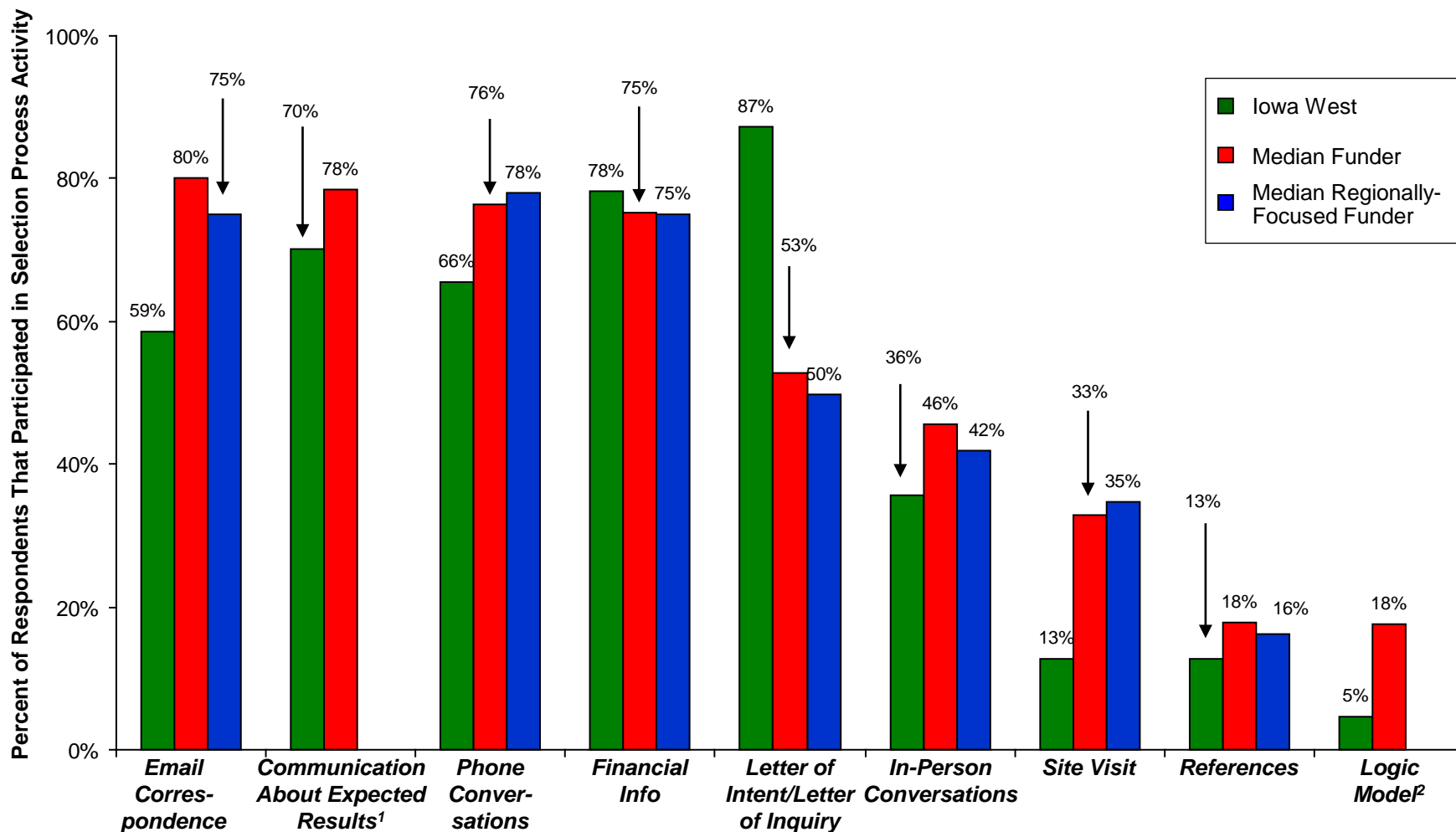
Time Elapsed Between Proposal Submission and Clear Commitment



Note: This question was only asked of those grantees that had submitted a proposal for their grant by the time they took the survey. For Iowa West, 95 percent of grantees indicated they submitted a proposal for their grant by the time they took the survey, compared to 95 percent at the median funder, and 95 percent of respondents at the median regionally-focused funder.

Selection Process Activities

Selection Process Activities



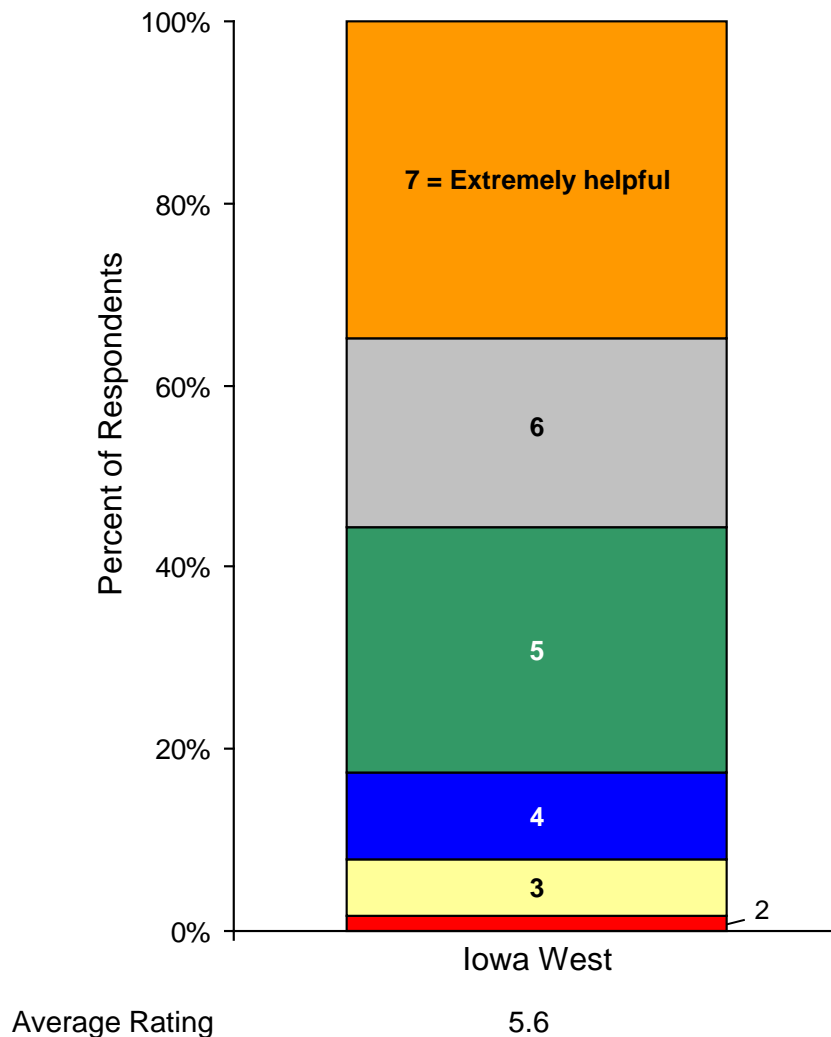
1: Represents data from 91 funders.

2: Represents data from 78 funders.

Note: Regionally-Focused Funder data on "Communication About Expected Results" and "Logic Model" not available due to changes to the survey instrument.

Grant Proposal Workshops

Grantees were asked about the helpfulness of the Foundation's grant proposal workshops. Thirty-five percent of grantees rated 7 on this measure.



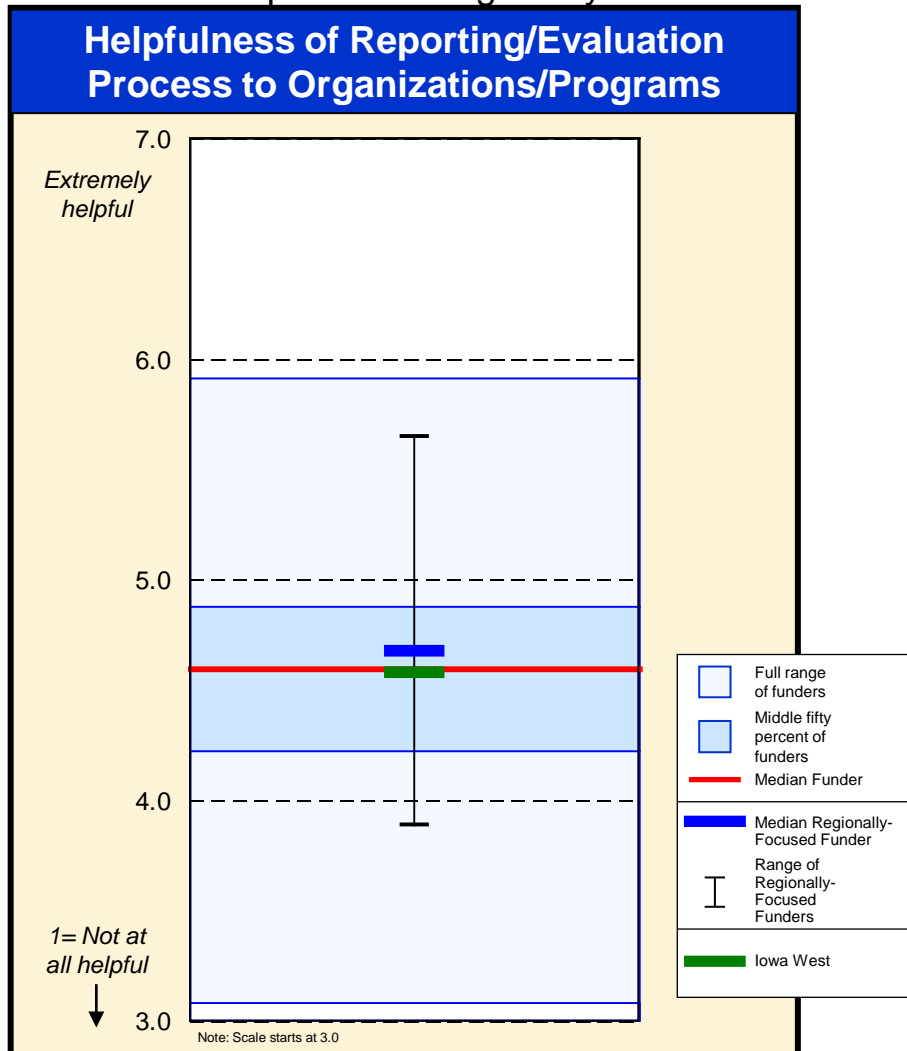
Note: No Iowa West grantees rated a 1 on this measure. "1" corresponds to "Not helpful."

Note: Comparative data not available because this question was only asked of Iowa West grantees.

Helpfulness of Reporting and Evaluation Processes

On helpfulness of the Foundation's reporting/evaluation process in strengthening funded organizations/programs, Iowa West is rated:

- below 51 percent of funders
- below 54 percent of regionally-focused funders in the cohort



Selected Grantee Comments

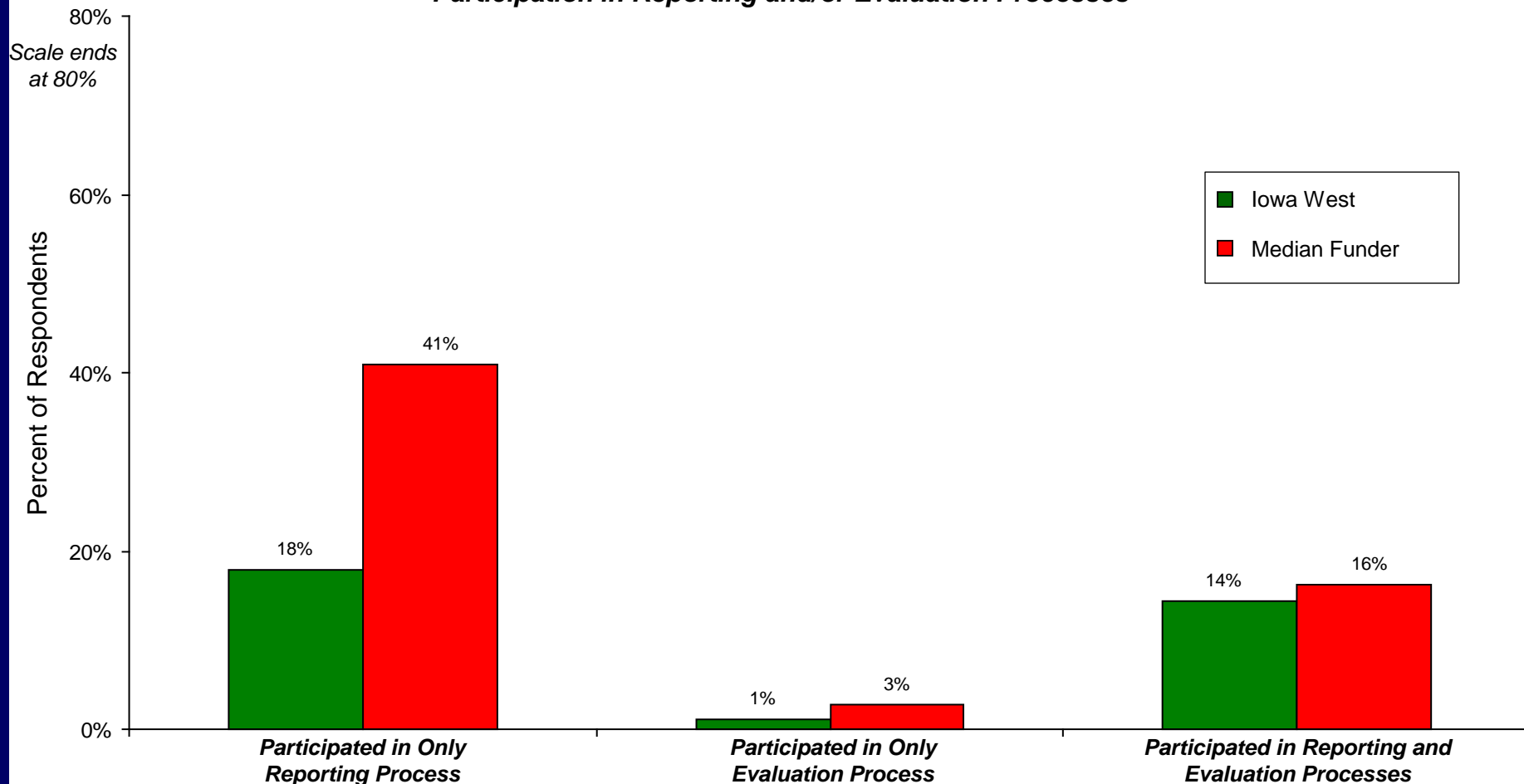
- ♦ *“The processes are helpful, and they make efforts for continuous improvement.”*
- ♦ *“Processes easy to understand and follow.”*
- ♦ *“I find Iowa West’s grantmaking procedures and expectations very clear.”*
- ♦ *“[The Foundation’s] funding guidelines and processes have always been very clear to our organization.”*
- ♦ *“The process of working with Iowa West Foundation is improving significantly in recent months.”*

Note: This question was only asked of those grantees that had participated in a reporting or evaluation process by the time they took the survey. For Iowa West, 33 percent of grantees indicated that they had participated in a reporting or evaluation process by the time they took the survey, compared to 60 percent at the median funder, and 57 percent of respondents at the median regionally-focused funder.

Reporting and Evaluation Processes

Iowa West grantees were asked if they participated in or will participate in the Foundation's reporting and/or evaluation processes.

Participation in Reporting and/or Evaluation Processes



Note: For Iowa West, 67% percent of grantees reported that a reporting/evaluation process had not occurred at the time of the survey.

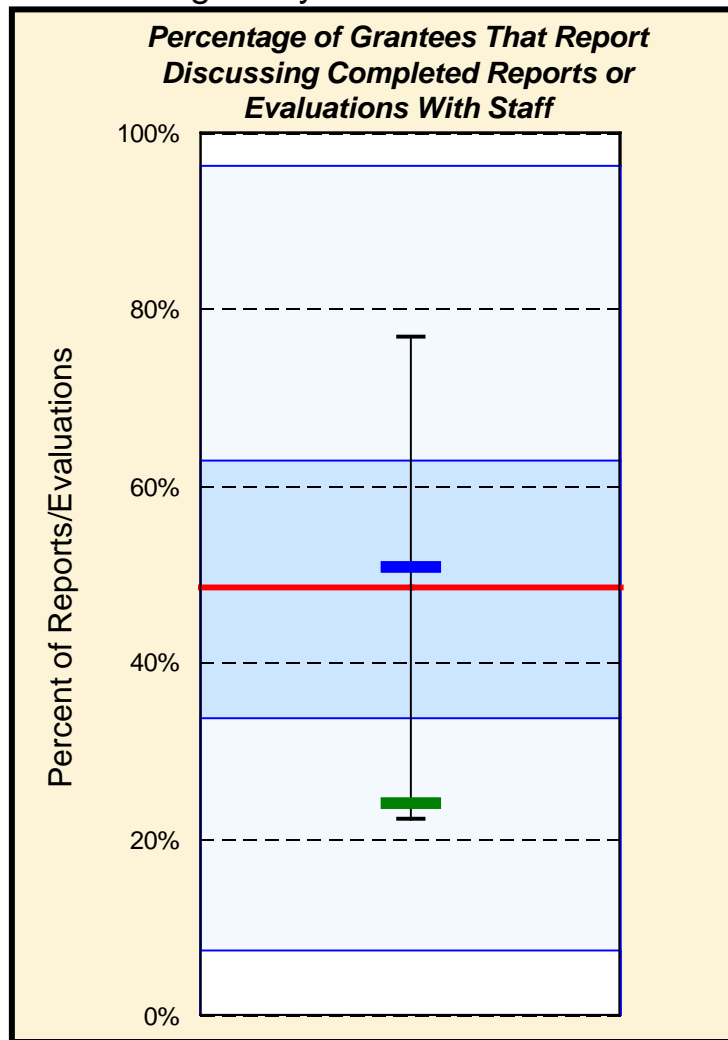
Note: This chart represents data from 58 funders.

Note: Regionally-focused Funder data not available due to changes to the survey instrument.

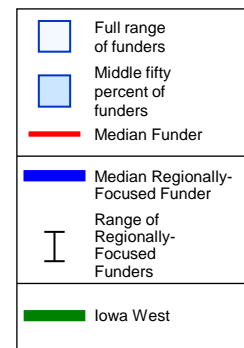
Discussion of Report or Evaluation

The proportion of Iowa West grantees that reported discussing their completed reports or evaluations with Foundation staff is:

- smaller than that of 84 percent of funders
- smaller than that of 94 percent of regionally-focused funders in the cohort



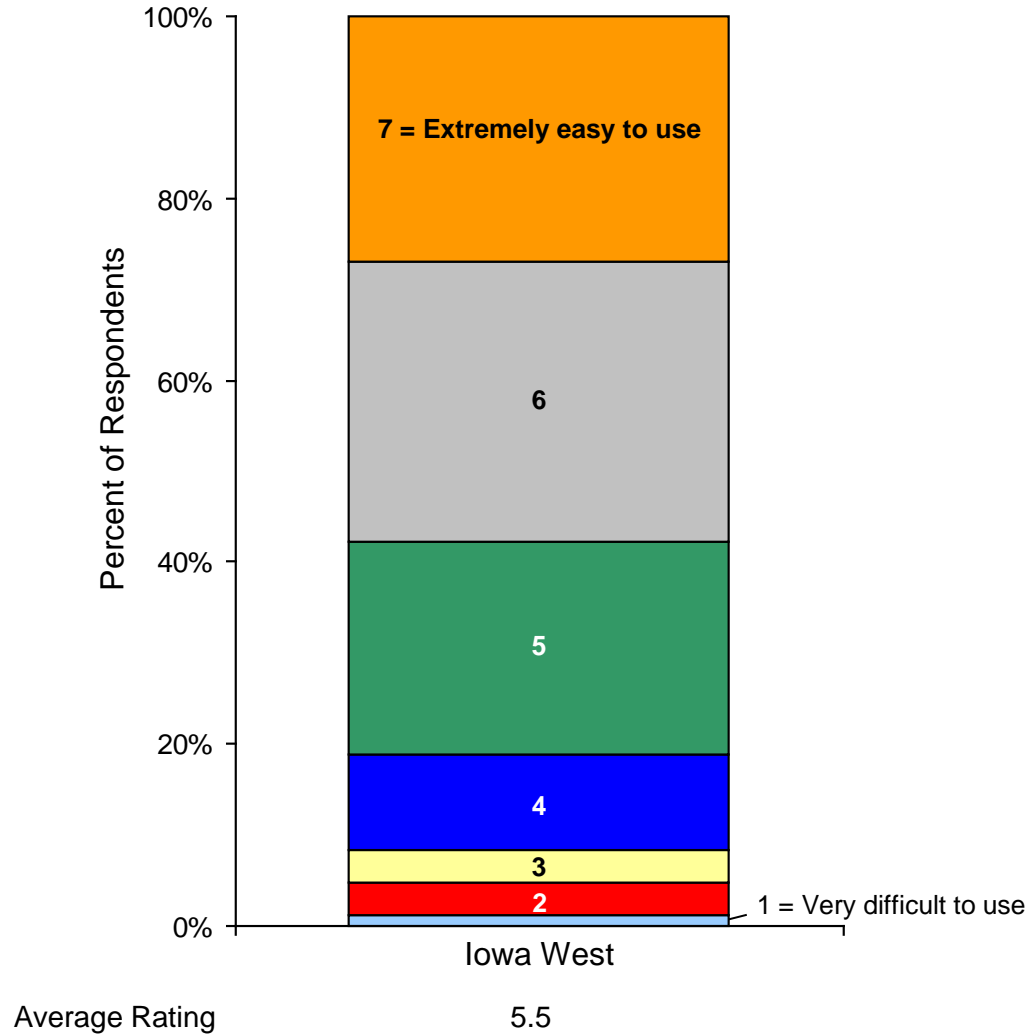
Survey-Wide Analysis Fact: The helpfulness of the reporting or evaluation process is the lowest rated measure by grantees in CEP's dataset. However, grantees who have a discussion about their reports or evaluations with their funder tend to find the reporting or evaluation process to be significantly more helpful in strengthening their organizations. For more on these findings and resulting management implications, please see CEP's report, *Grantees Report Back: Helpful Reporting and Evaluation Processes*.



Note: This question was only asked of those grantees that had participated in a reporting or evaluation process by the time they took the survey. For Iowa West, 33 percent of grantees indicated that they had participated in a reporting or evaluation process by the time they took the survey, compared to 60 percent at the median funder, and 57 percent of respondents at the median regionally-focused funder.

Ease of Use of Cybergrants System

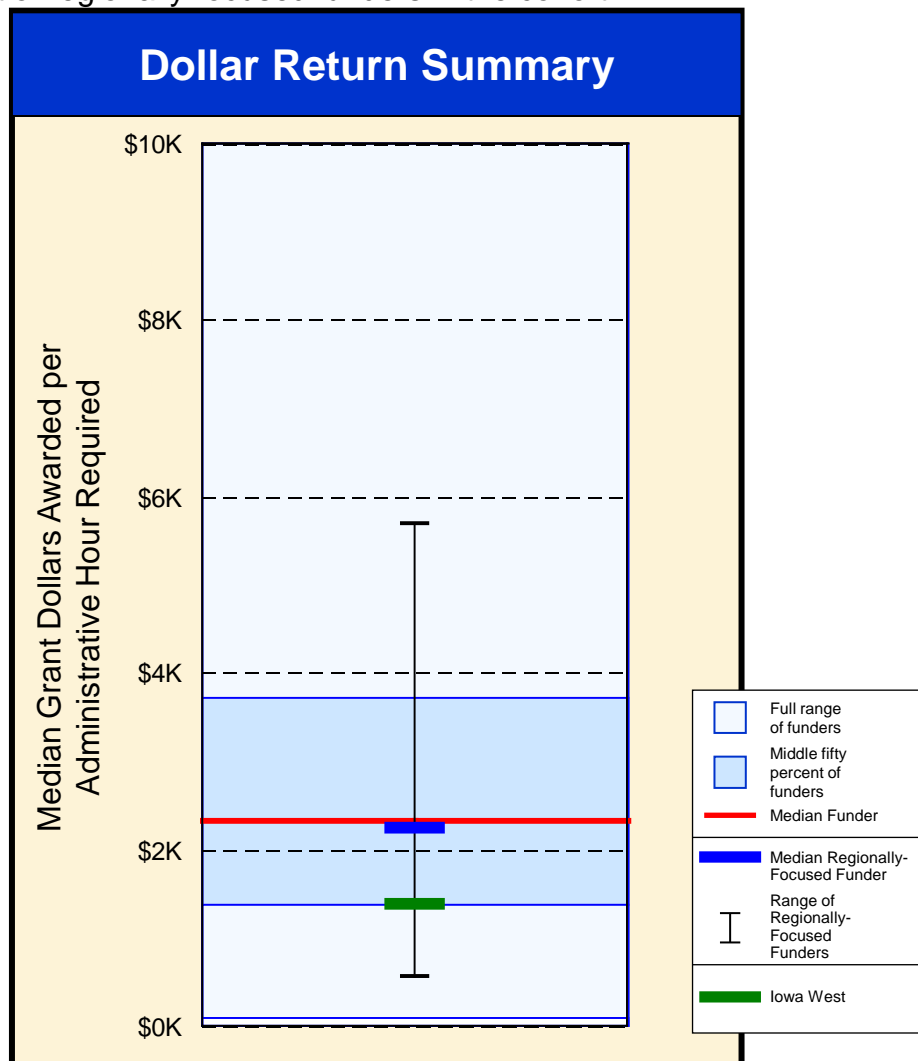
Grantees were asked about the ease of using the Foundation's online system, Cybergrants. Twenty-seven percent of grantees rated a 7 on this measure.



Dollar Return Summary

This summary measure includes the total grant dollars awarded and the total time necessary to fulfill the administrative requirements over the lifetime of the grant. At the median, the number of dollars awarded per hour of administrative time spent by Iowa West grantees is:

- less than that of 75 percent of funders
- less than that of 84 percent of regionally-focused funders in the cohort



Note: Dollar Return on Grantee Administrative Hours is calculated for each grantee and aggregated by philanthropic funder for the Dollar Return Summary. Chart does not show data from eleven funders whose Dollar Return on Grantee Administrative Hours exceeds \$10K.

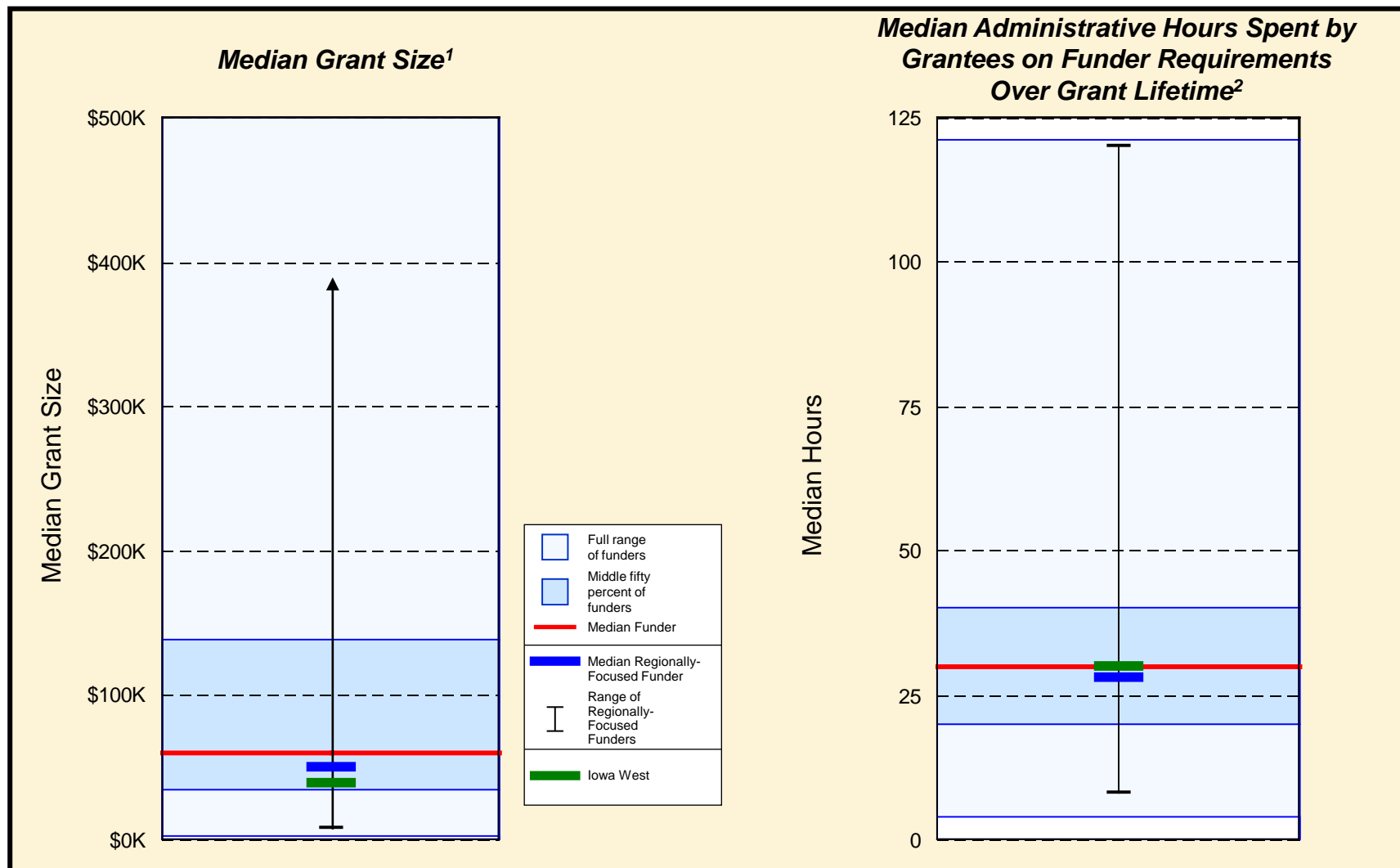
Grant Size and Administrative Time

At the median, the grant size reported by Iowa West grantees is:

- smaller than that of 72 percent of funders
- smaller than that of 77 percent of regionally-focused funders in the cohort

At the median, the number of hours of administrative time spent by Iowa West grantees during the course of the grant is:

- less than the time spent by grantees of 51 percent of funders
- greater than the time spent by grantees of 55 percent of regionally-focused funders in the cohort



1: Chart does not show data from 12 funders whose median grant size exceeds \$500K.

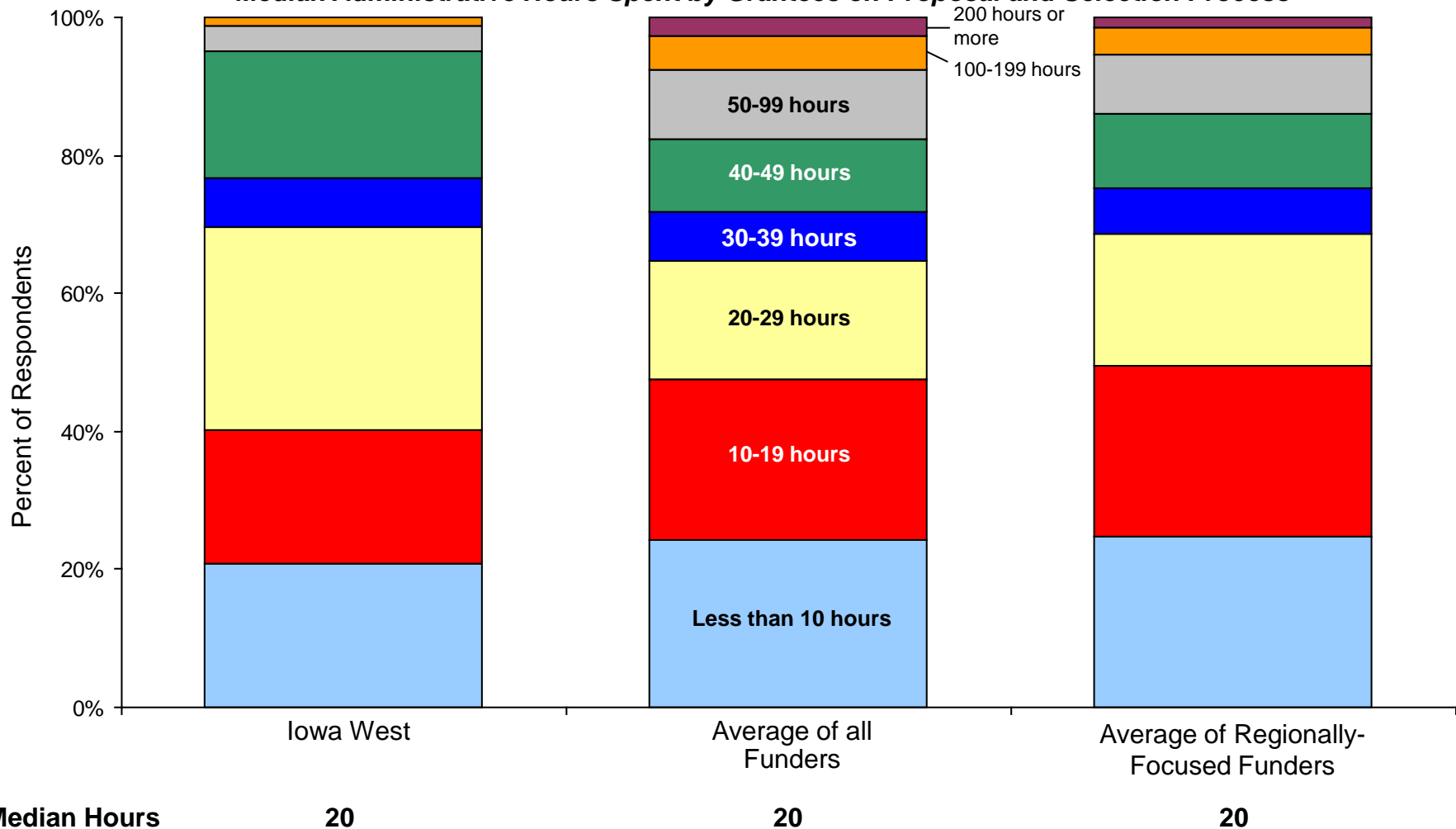
2: Chart displays total grant proposal creation, evaluation, and monitoring hours spent over the life of the grant; each of these events did not necessarily occur for each individual grantee. Chart does not show data from four funders whose median administrative hours exceed 125 hours.

Administrative Time – Proposal and Selection Process

At the median, the number of hours of administrative time spent by Iowa West grantees during the selection process is:

- at the median
- greater than the time spent by grantees of 52 percent of regionally-focused funders in the cohort

Median Administrative Hours Spent by Grantees on Proposal and Selection Process

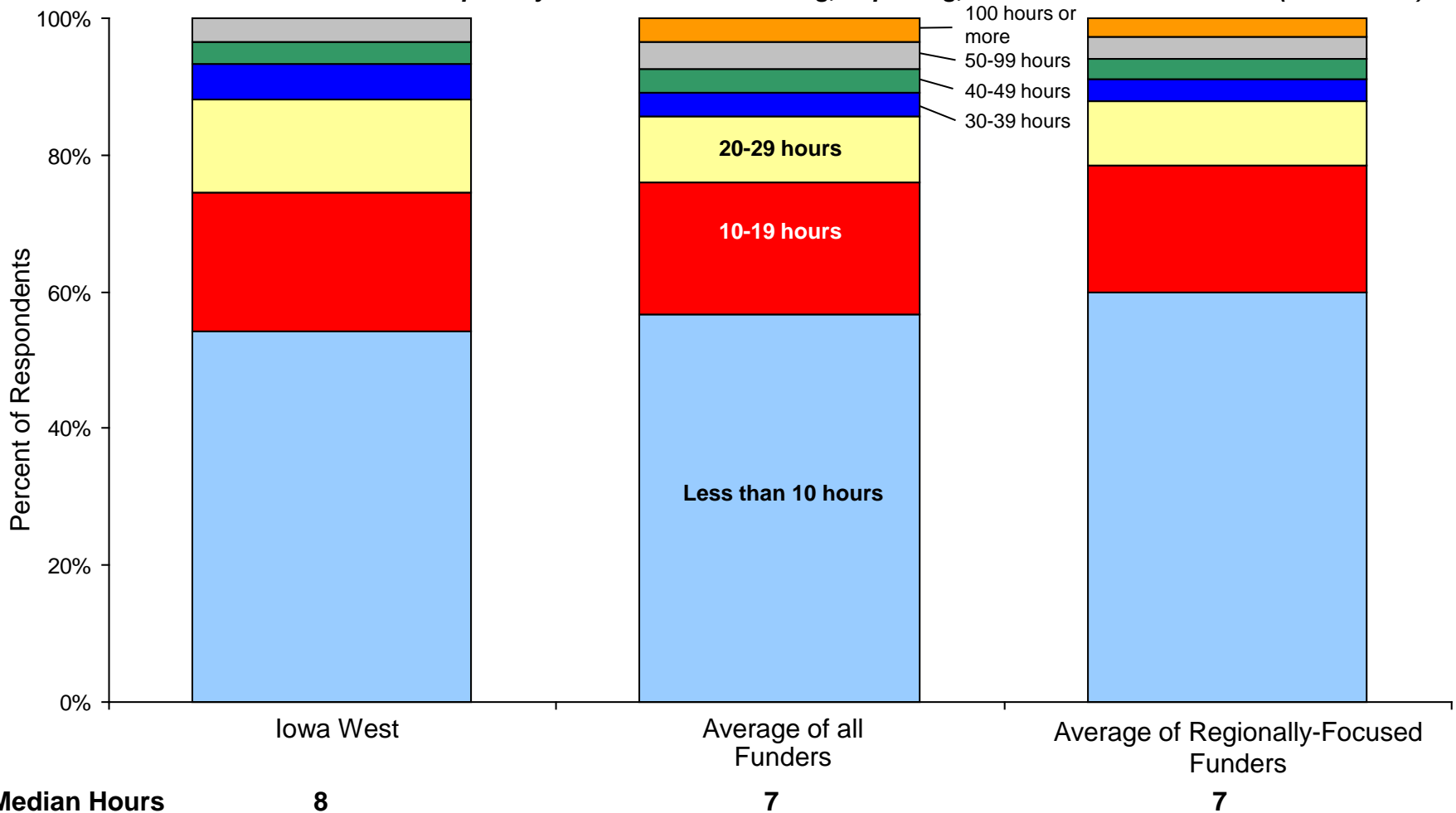


Administrative Time – Reporting and Evaluation Processes

At the median, the number of hours of administrative time spent by Iowa West grantees per year on the reporting/evaluation process is:

- greater than the time spent by grantees of 53 percent of funders
- greater than the time spent by grantees of 55 percent of regionally-focused funders in the cohort

Median Administrative Hours Spent by Grantees on Monitoring, Reporting, and Evaluation Processes (Annualized)

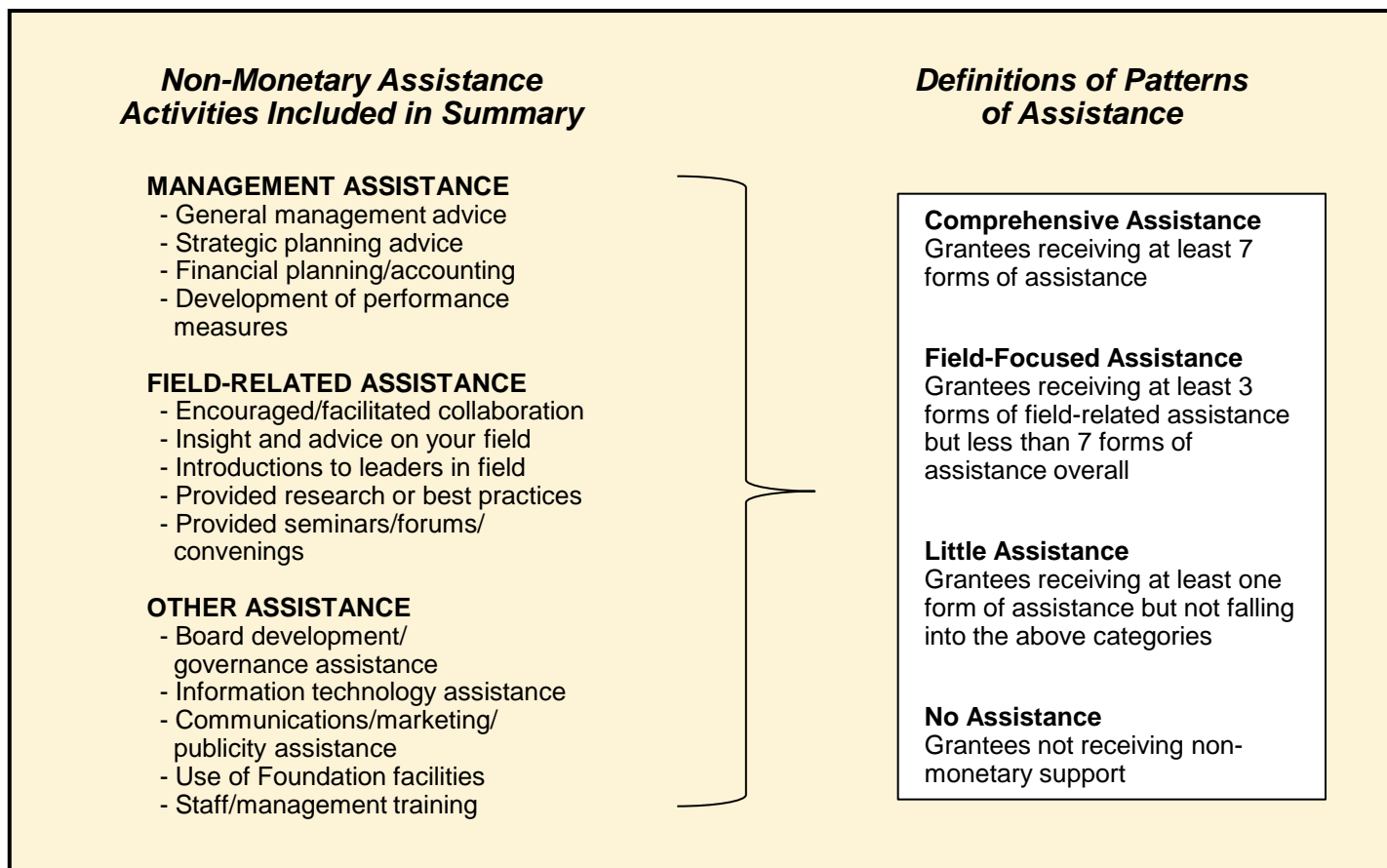


Note: "Evaluation" in the survey includes any activity considered by grantees to be part of an evaluation, and does not necessarily correspond to the Foundation's definition.

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Non-Monetary Assistance Summary (1)

The non-monetary assistance summary includes the fourteen activities listed below. Provision of assistance patterns fall into the four categories: comprehensive assistance, field-focused assistance, little assistance, and no assistance.

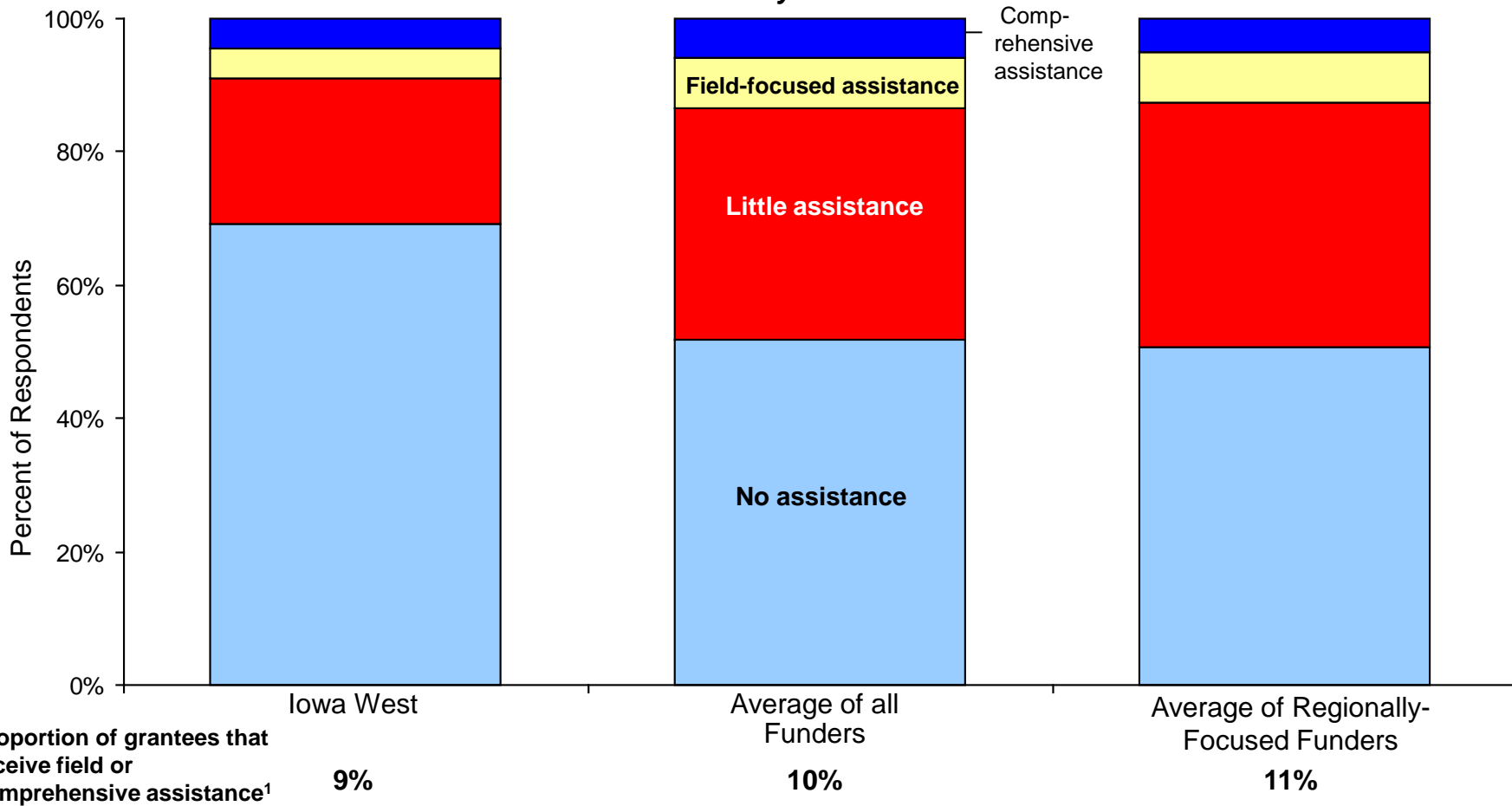


Non-Monetary Assistance Summary (2)

The proportion of Iowa West grantees that report receiving comprehensive or field-focused assistance is:

- smaller than that of 56 percent of funders
- smaller than that of 61 percent of regionally-focused funders in the cohort

Non-Monetary Assistance Patterns



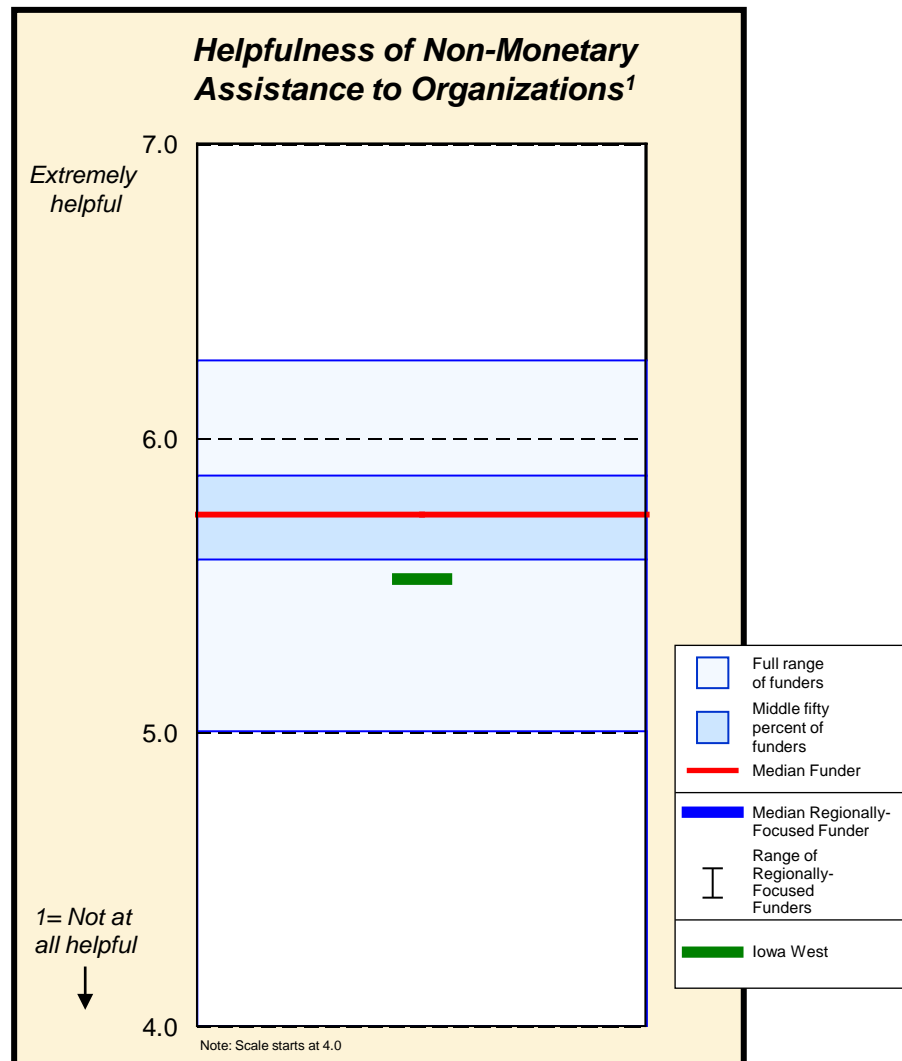
Survey-Wide Analysis Fact: Providing just two or three types of assistance appears to be ineffective; it is only when grantees receive either a comprehensive set of assistance activities or a set of mainly field-focused types of assistance that they have a substantially more positive and productive experience with their foundation funders than grantees receiving no assistance. For more information on these findings, please see CEP's report, *More than Money: Making a Difference with Assistance Beyond the Grant Check*.

1: The proportion shown for "Average of all Funders" and "Average of Regionally-Focused Funders" is a median.

Helpfulness of Non-Monetary Assistance

On helpfulness of the non-monetary assistance provided by the Foundation in strengthening grantee organizations' work, Iowa West is rated:

- below 82 percent of funders



Note: Regionally-focused funder data not available due to changes to the survey instrument.

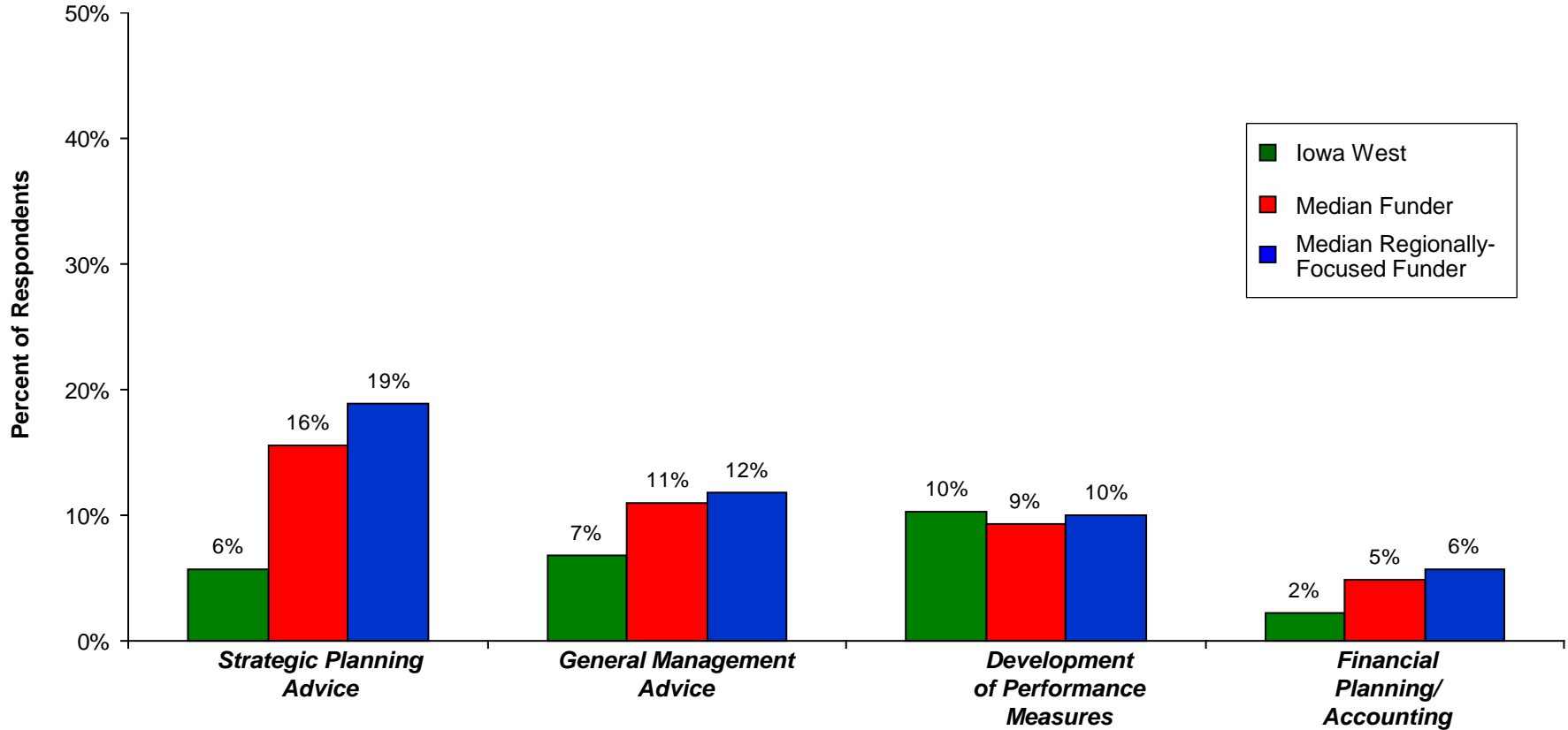
Note: This question was only asked of those grantees that indicated they received non-monetary assistance from staff or a third party paid for by the Foundation.

1: Represents data from 58 funders.

Management Assistance Activities

Frequency of Management Assistance Activities

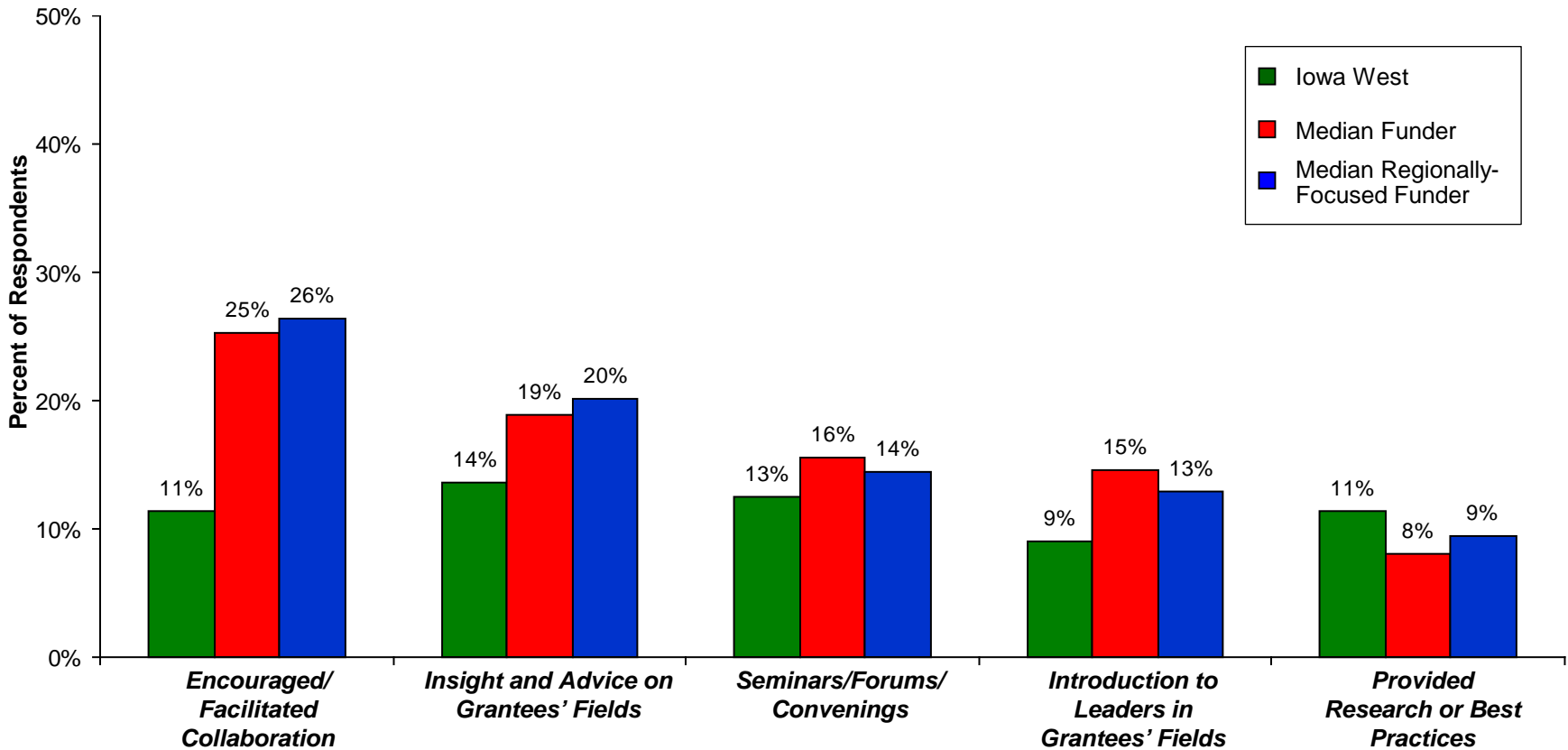
Scale ends at 50%



Field-Related Assistance Activities

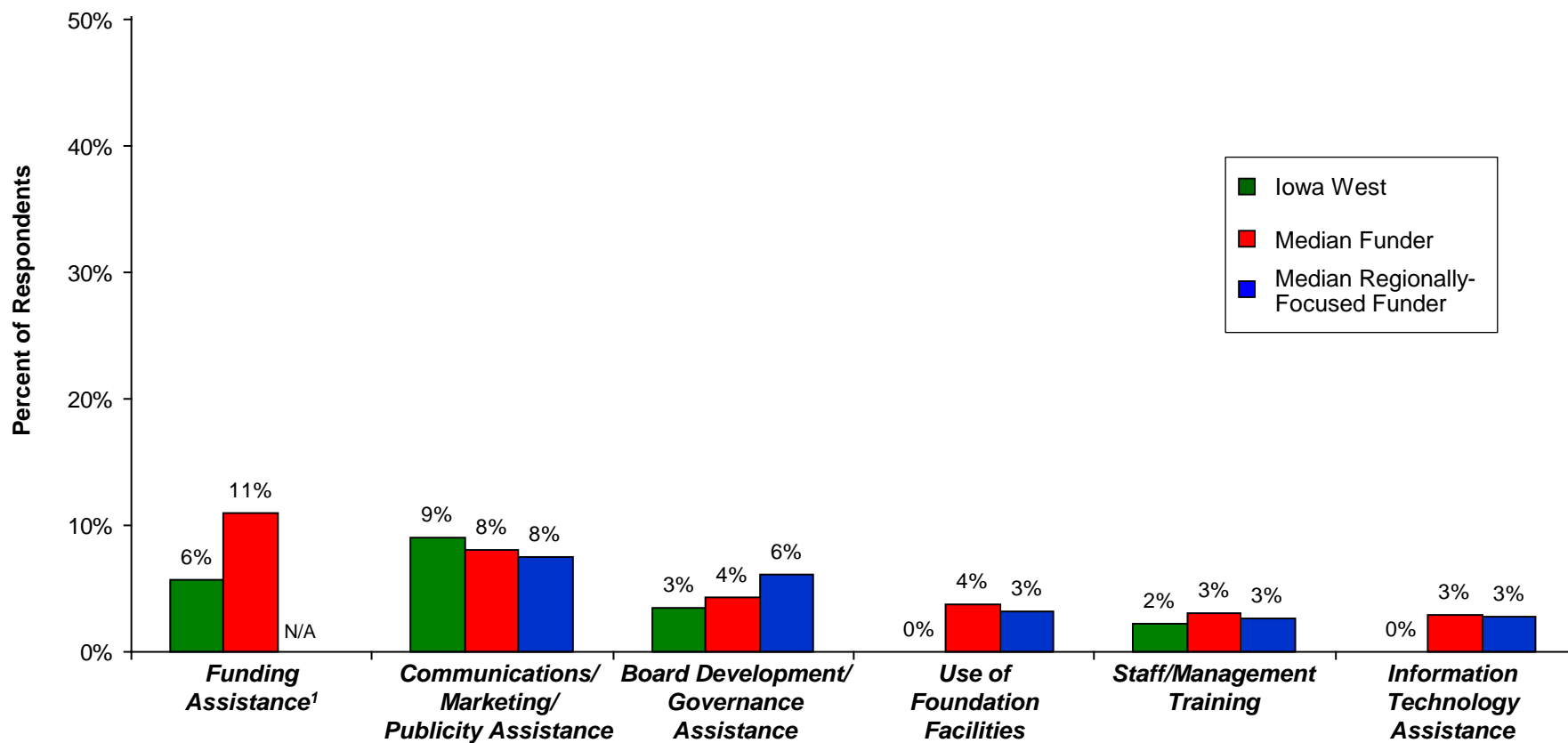
Frequency of Field-Related Assistance Activities

Scale ends at 50%



Frequency of Other Assistance Activities

Scale ends at 50%

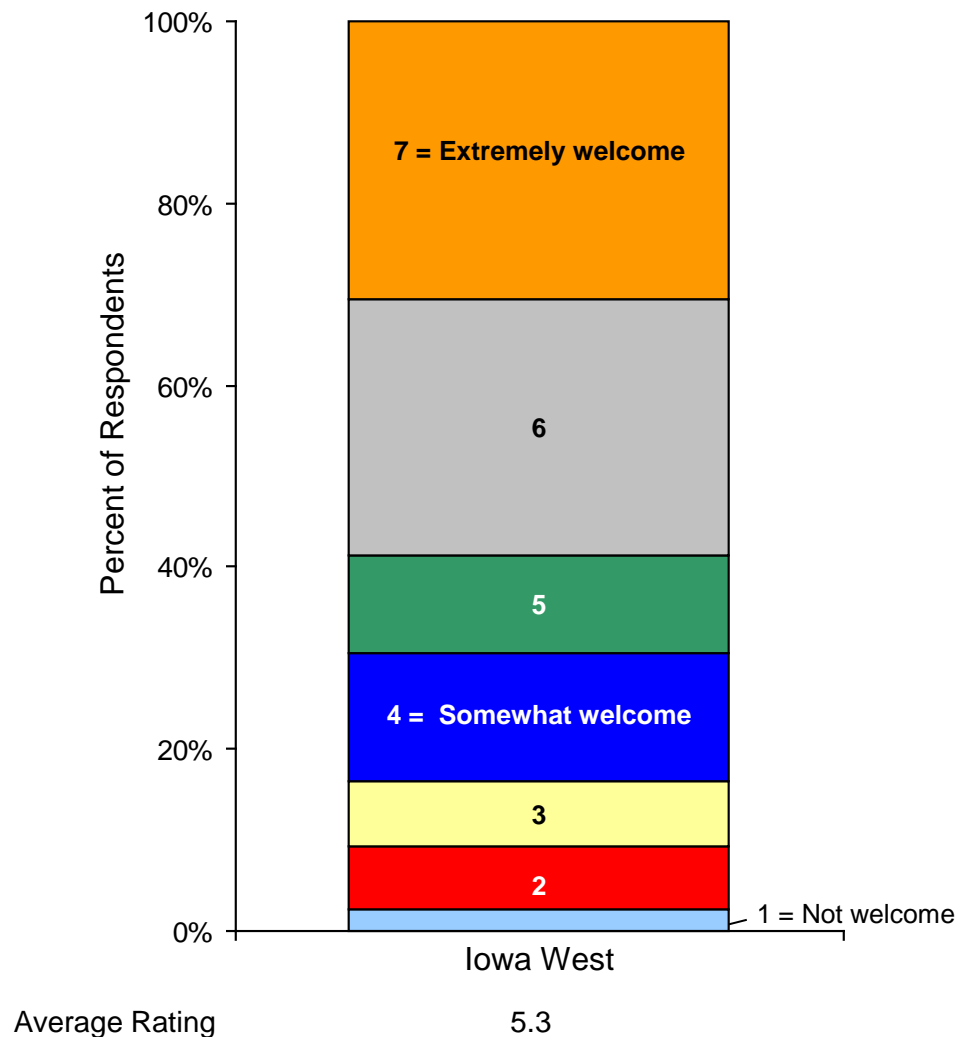


Note: Regionally-Focused Funder data on "Funding Assistance" not available due to changes to the survey instrument.

1: Represents data from 34 funders.

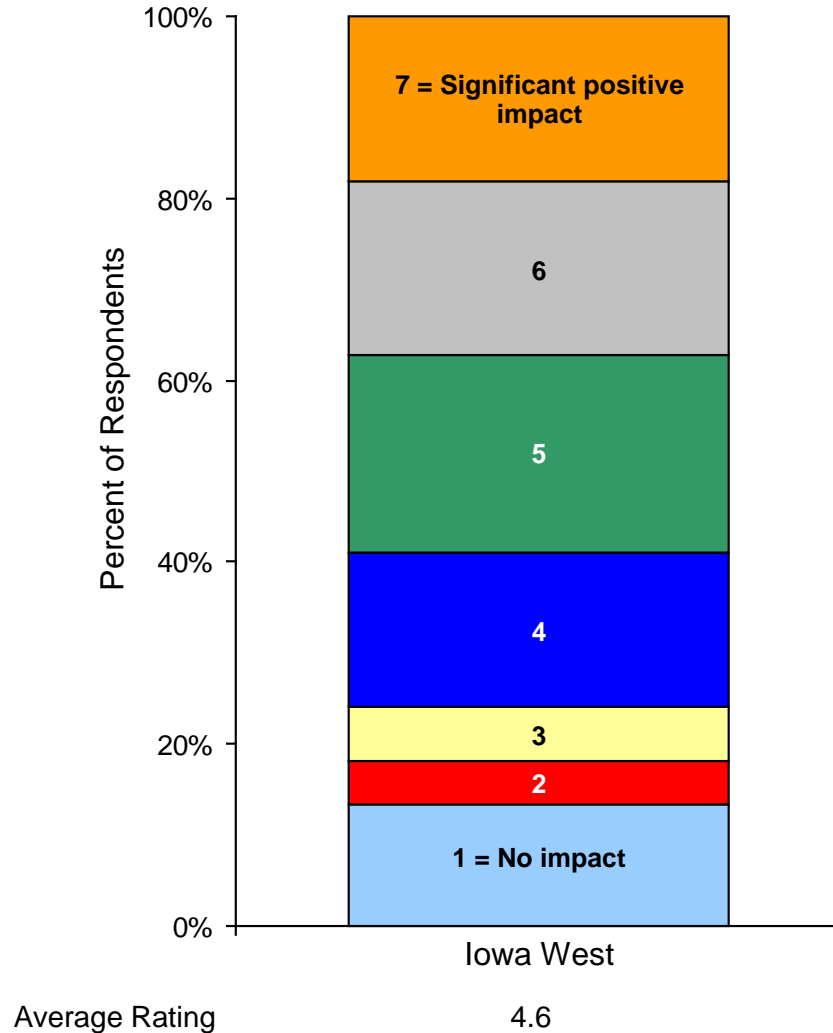
Technical Assistance

Grantees were asked whether they would welcome technical assistance in the areas of program design, planning, and evaluation. Seventy percent of grantees rated a 5 or higher on this measure.



Effect on Obtaining Additional Funding

Grantees were asked how their engagement with Iowa West affected their ability to obtain additional funding from other sources. Fifty-nine percent of grantees rated a 5 or higher on this measure.

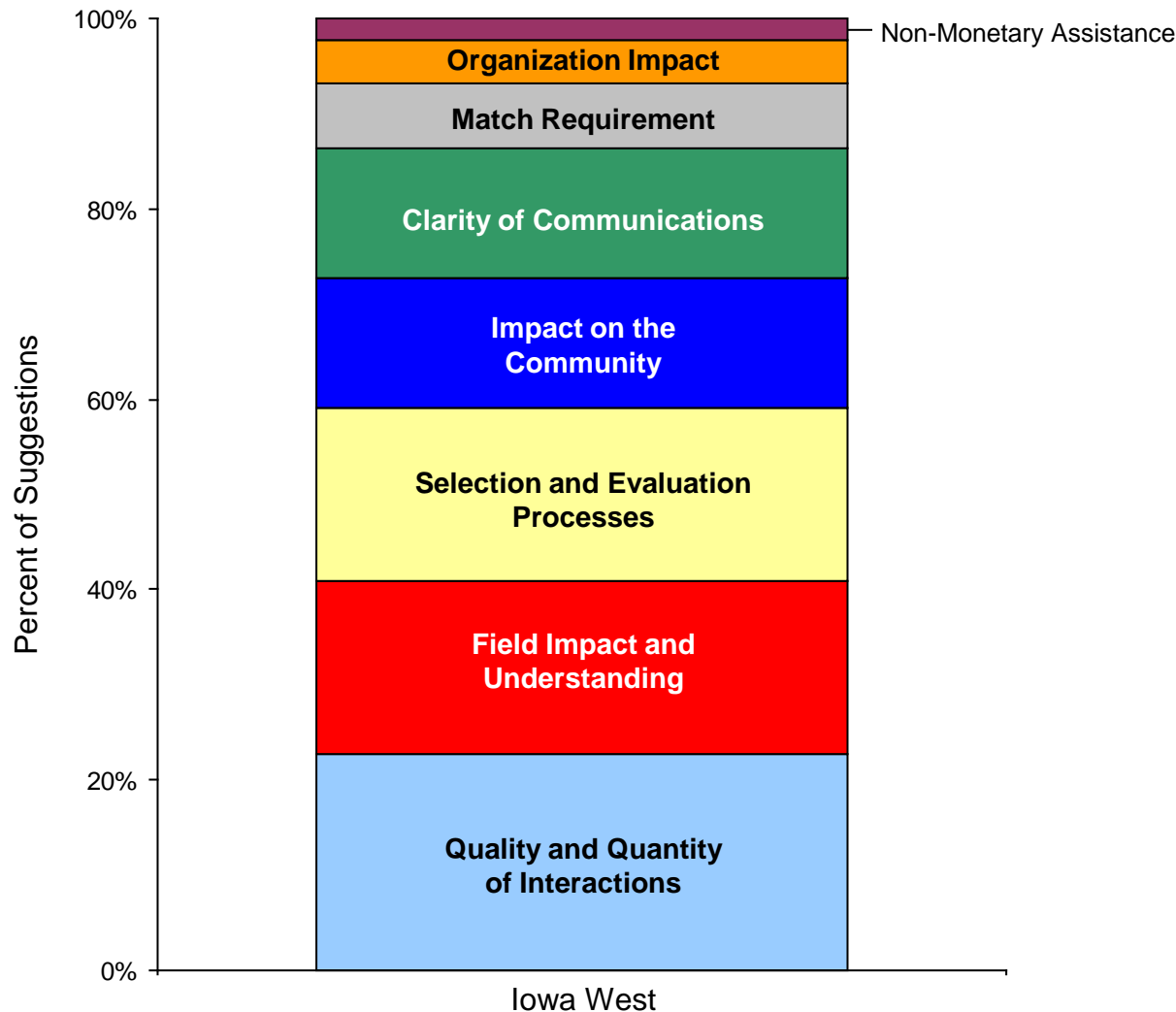


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Grantee Suggestions for the Foundation (1)

Grantees were asked to provide any suggestions for how the Foundation could improve. The most frequently mentioned suggestions for improvement concern the quality and quantity of interactions.

Topics of Grantee Suggestions



Note: There were a total of 44 grantee suggestions for Iowa West.

Grantee Suggestions for the Foundation (2)

% Grantee Suggestions		Iowa West Grantee Suggestions
Topic of Grantee Suggestion	Iowa West	Sample of Comments
Quality and Quantity of Interactions	24%	<p>"It might be beneficial to have additional conversations exploring ways to expand the current work."</p> <p>"Be open to inquiries and questions. Treat us as a colleague in the field, not a 'parent/child' relationship."</p> <p>"More site visits."</p> <p>"Rather than dictating the solution, be willing to engage in equal and honest discussions with the various organizations that implement most of the projects and programs in the community."</p>
Field Impact and Understanding	18%	<p>"Iowa West could strengthen its position as an innovator in the field by broadening its vision to identify the arts and culture as an important aspect to community development."</p> <p>"More community and economic development projects."</p> <p>"Wish it were a little easier for the rural communities to participate in Iowa West."</p>
Selection and Evaluation Processes	18%	<p>"Continue to hold open informational meetings regarding grant process and procedures."</p> <p>"Continue to refine the online application process."</p> <p>"Make sure the process of approval, application, reporting, and payment is extremely clear and that the information communicated in print, online, and given from staff is always consistent. We have been confused as to when each report or document is due and which is of the most importance."</p>
Impact on the Community	14%	<p>"Have a more unified, professional staff and board who understands the needs of the community."</p> <p>"To continue to build relationships with organizations in the South Omaha area."</p> <p>"Use a more bottom up versus top down approach to evaluating the needs and wants of the community."</p>
Clarity of Communications	14%	<p>"Clarity of what their new focus areas will be, and what their plans are for the communities that they serve."</p> <p>"More communication about IWF needs or expects of grantees."</p> <p>"Continuing to clearly communicate the priorities of the Foundation so those of us in fields that are not among those priorities can seek funding elsewhere is key to my relationship with the Foundation."</p>

Note: There were a total of 44 grantee suggestions for Iowa West. A sample of the suggestions are shown here. The full set of suggestions, redacted to protect grantee anonymity, will be provided with the GPR.

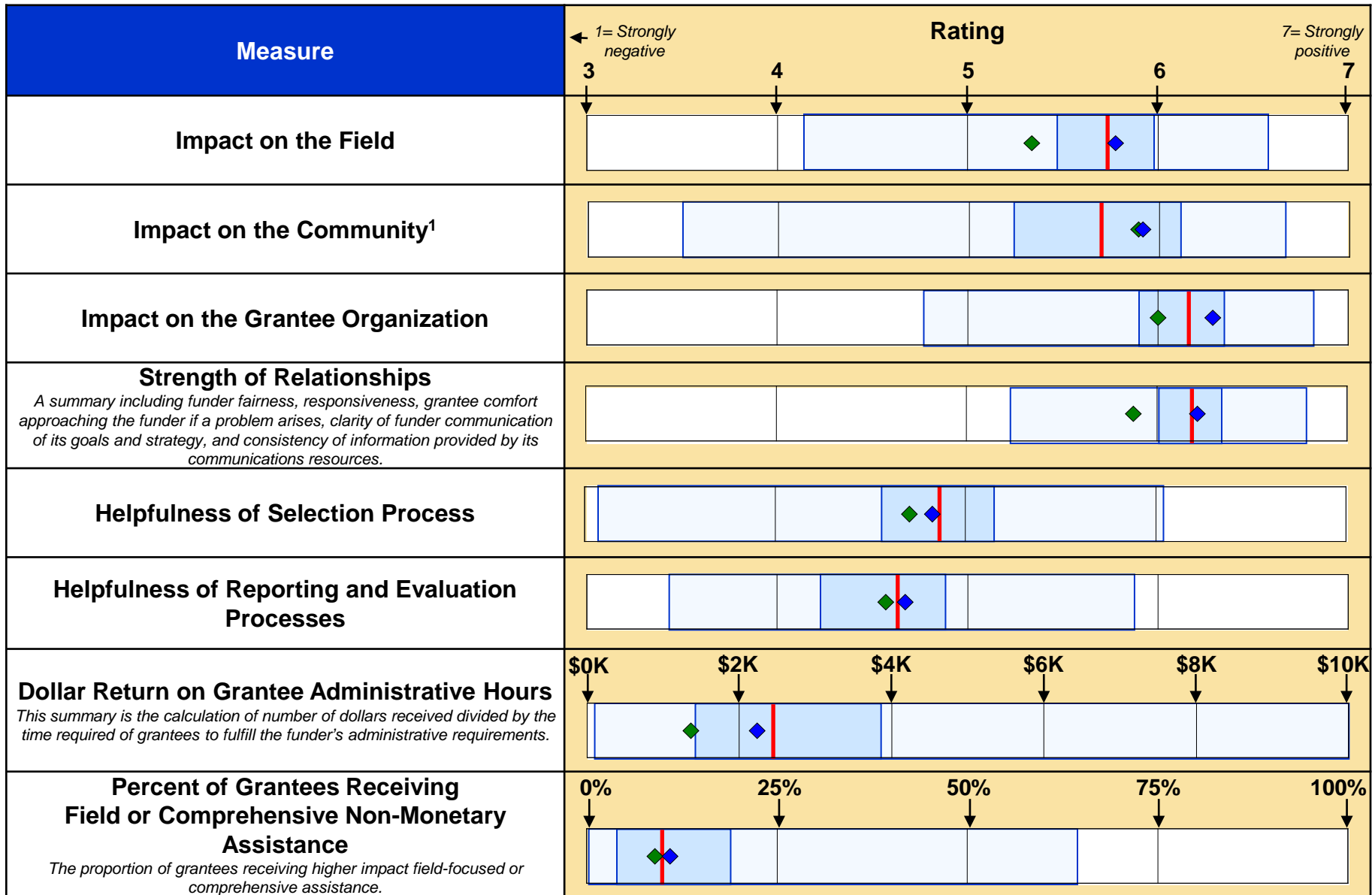
Grantee Suggestions for the Foundation (3)

% Grantee Suggestions		Iowa West Grantee Suggestions
Topic of Grantee Suggestion	Iowa West	Sample of Comments
Match Requirement	7%	<p>“Not always requiring a 50/50 match.”</p> <p>“Matching for a small community limits the funds they can apply for to start future projects that are needed in the community.”</p> <p>“It becomes difficult for us to meet the 50% matching requirement.”</p>
Organization Impact	5%	<p>“IWF may need to restructure how they work with public schools.”</p>
Non-monetary Assistance	2%	<p>“We would love more research reports from Iowa West regarding the population the Foundation serves, specifically related to education in the Council Bluffs community.”</p>

Note: There were a total of 44 grantee suggestions for Iowa West. A sample of the suggestions are shown here. The full set of suggestions, redacted to protect grantee anonymity, will be provided with the GPR.

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Review of Findings



1: Chart does not show data from two funders whose community impact rating is less than 3.0.

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Analysis and Discussion (1)

Perceived Impact on Organizations and Communities

Overall, the Iowa West Foundation (“Iowa West”) is seen by grantees to have an impact through its funding. Iowa West grantees, which compared to grantees of other funders are relatively small but long-established organizations, call the Foundation “generous” and “helpful.”

Iowa West gets typical ratings for its impact on grantees’ local communities and grantees rate the Foundation’s understanding of their communities typically. One grantee describes the Foundation as having a “tremendous impact in the Southwest Iowa community.” According to another grantee, “every day this community is impacted by Iowa West in some way. Their funding has provided an extraordinary amount of change for the better through all of their focus areas.”

Similarly, Iowa West’s grantees rate it positively on an absolute basis and just slightly lower than typical for its impact on their organizations. This finding is supported by grantees’ comments. As one grantee explains, “IWF creates opportunities for organizations like mine to develop new techniques and approaches for working with the community.” Another grantee says the Foundation has “[allowed] us to develop a program that [is key to our mission].”

- ◆ *Although the Foundation is rated positively for its impact on grantees’ organizations, grantees give lower comparative ratings for the impact the Foundation has had on the sustainability of the work it is funding. Is the Foundation looking for sustainability of the work it funds? Does it believe that more focus on sustainability would help it accelerate its impact on grantees and communities?*

Analysis and Discussion (2)

Opportunity to Improve Relationships with Grantees

Iowa West grantees rate their interactions, and more generally, relationships with the Foundation substantially lower than do grantees at the typical foundation in CEP's comparative dataset. The quality of relationships between funders and grantees is a key indicator of effectiveness. Grantees are a funder's chosen agents of change, and grantees' ability to get timely, helpful, and respectful interaction with their funders undoubtedly affects the quality of work they conduct with Foundation funds.

While some grantees are satisfied with their interactions with staff, and indicate their interactions have been "valuable and informative" and "helpful and open," many grantee comments reflect their frustration with their relationships with the Foundation. Some describe the staff as "abrupt at times," "rigid," or "unresponsive." Grantees, overall, do not feel the Foundation understands them as well as it could: Iowa West is rated in the bottom quartile for its understanding of grantees' goals and strategies. It is rated in the top quartile for the amount of pressure grantees feel to modify their own priorities in order to get a grant from the Foundation. As one grantee explains, major decisions "are made while having neglected to seek input from organizations that specialize in a given area or getting input from those affected."

There are some brighter spots in these relationships, though. Grantees that receive more frequent or reciprocal engagement from the Foundation rate Iowa West higher on these measures. For example, 57 percent of Iowa West grantees (compared to 81 percent at the typical foundation) interact with their program officers once every few months or more often. These grantees rate higher on measures related to their relationship with the Foundation. Similarly, a smaller than typical proportion of Iowa West grantees – 32 percent – indicate that interactions with Iowa West staff are initiated with equal frequency by the grantee and the Foundation. Grantees that *do* experience this mutual initiation rate higher for the quality of their interactions.

Analysis and Discussion (3)

Opportunity to Improve Relationships with Grantees (cont.)

CEP's research indicates that in addition to the quality of interactions, Foundation communications play a key role in determining the quality of grantee-funder relationships. While the Foundation's communications are rated typically for their clarity, the consistency of information provided by the Foundation is rated lower than typical. As one grantee says, "There seems to be no unity to staff and the Foundation," and when you ask a question "you will get a different response depending upon who answers."

Current levels of engagement and communication with grantees are potentially related to the higher than typical caseload of Iowa West staff. The Foundation reported to CEP a higher than typical number of active grants per full-time program employee compared to the typical Foundation in CEP's dataset. This high caseload may also be recognized by grantees: as one grantee comments, the Foundation is "now overwhelmed with requests" which results in "less personal contact [than] was available with our [previous] grants."

- ◆ *What mechanisms and practices does the Foundation currently employ to truly understand and then demonstrate understanding of grantees' goals and strategies?*
- ◆ *What does the Foundation believe is the impact of the higher than typical caseload on interactions with grantees?*
- ◆ *If the Foundation cannot or does not want to create more frequent interaction and communication with grantees, how can it set expectations appropriately for grantees about the level of interaction they are likely to receive?*

Analysis and Discussion (4)

The Foundation's Grantmaking Characteristics May Be Limiting Its Potential Impact

CEP's research across funders has found that the combination of larger, longer-term grants, and general operating support contributes to more positive perceptions of a funder's impact on grantees' organizations. Specifically, throughout CEP's dataset, grantees that receive multi-year operating grants at sizes larger than are typically awarded give the highest ratings on their funder's impact on their organizations. At Iowa West, few grants meet these criteria. The Foundation's median grant size is \$39K, smaller than typical; only 8 percent of grantees report receiving general operating support; and only 33 percent of grantees report receiving multi-year grants. The few grantees who do report receiving general operating support rate the Foundation higher than other Iowa West grantees and grantees at the typical Foundation for its impact on their organization.

Potentially complicating this issue for the Foundation is its requirement that some grantees obtain matching funding for its grants. A few grantees commented negatively on this practice. One grantee worries that "matching for a small community limits the funds [nonprofits] can apply for to start future projects that are needed in the community." Another explains that "It becomes difficult for us to meet the 50% matching requirement," and asks that Iowa West "take a more active role in leveraging other resources to meet local needs."

Analysis and Discussion (5)

The Foundation's Grantmaking Characteristics May Be Limiting Its Potential Impact (cont.)

Despite requiring some grantees to obtain matching funds—a system that inherently requires more outside fundraising on the part of grantees—currently, the Foundation less frequently than typical helps its grantees obtain funding from other sources. The typical funder provides active assistance securing funding to 11 percent of its grantees. In contrast, only 6 percent of Iowa West grantees report receiving this assistance. Still, when asked how their involvement with Iowa West has impacted their fundraising efforts, forty percent of grantees say their involvement with the Foundation has had a positive effect, rating a 6 or 7 on a 7 point scale.

- ◆ *Has the Foundation recently reviewed its preference for size, length, and type of support and the way those characteristics can either support or impede its impact goals? About half of grantees say they've had a funding relationship with the Foundation for six or more years and about half say they've received consistent funding in the past. Could the Foundation consider adjusting the size, duration, and/or type of support for some of its bedrock grantees?*
- ◆ *Could the provision of more multi-year grants serve the dual purpose of reducing Foundation staff time spent on application administration while potentially increasing the impact on grantee organizations?*
- ◆ *What does Iowa West see as the key value of matching grants? Can the Foundation provide more assistance to grantees in their efforts to raise matching funds?*

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Additional GPR Results

Survey Item	Iowa West	Full Dataset Median	Regionally-Focused Funder Median
Understanding of Social, Cultural, and Socioeconomic Factors			
How well does the Foundation understand the social, cultural, and socioeconomic factors that affect your work? (1="Limited understanding", 7="Thorough understanding") ¹	5.2	5.7	N/A
Assessing Results of the Funded Work			
Proportion of grantees that exchanged ideas with Iowa West regarding how it would assess results ²	43%	73%	60%
How useful to your organization was that exchange? (1="Not at all useful", 7="Extremely useful") ¹	5.6	5.7	N/A

1: This table includes data from 24 funders. Regionally-Focused Funder data not available due to changes to the survey instrument.

2: This table includes data from 58 funders. Regionally-Focused Funder data not available due to changes to the survey instrument.

Online Media

Measure	Iowa West	Full Dataset Median
Use of Online Resources Created by the Foundation or its Staff		
Facebook	3%	7%
Video Sharing (e.g., YouTube)	2%	5%
Blog(s)	1%	4%
Twitter	2%	3%
None of the above	41%	47%
Don't know whether the Foundation uses these online media resources	55%	37%
Potential Use of Online Resources (only asked of grantees who did not select one or more options to the question above)		
Facebook	52%	41%
Video Sharing (e.g., YouTube)	48%	53%
Blog(s)	50%	48%
Twitter	21%	20%
Other	N/A	N/A
Use of Online Resources to Communicate About Grantees' Work		
Facebook	76%	77%
Video Sharing (e.g., YouTube)	36%	52%
Blog(s)	24%	34%
Twitter	45%	44%
Other	21%	15%
None of the above	15%	13%

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Grantmaking Characteristics

Measure	Iowa West	Full Dataset Median	Regionally-Focused Funder Median
Length of Grant Awarded			
<i>Average grant length</i>	2.0 years	2.1 years	2.2 years
1 year	67%	51%	53%
2 years	10%	20%	20%
3 years	5%	17%	14%
4 years	3%	3%	4%
5 or more years	14%	8%	10%
Type of Grant Awarded			
Program/Project Support	69%	64%	64%
General Operating Support	8%	20%	21%
Capital Support: Building/Renovation/ Endowment Support/Other	17%	8%	8%
Technical Assistance	2%	5%	5%
Scholarship/Fellowship	1%	2%	1%
Event/Sponsorship Funding ¹	2%	N/A	N/A
Grant Amount Awarded			
<i>Median grant size</i>	\$39K	\$60K	\$50K
Less than \$10K	14%	11%	11%
\$10K - \$24K	12%	15%	14%
\$25K - \$49K	39%	15%	17%
\$50K - \$99K	14%	17%	18%
\$100K - \$149K	4%	10%	9%
\$150K - \$299K	2%	14%	14%
\$300K - \$499K	4%	7%	7%
\$500K - \$999K	4%	6%	5%
\$1MM and above	8%	7%	6%
Median Percent of Budget Funded By Grant (Annualized)			
Size of grant relative to size of grantee budget	3.5%	3.4%	3.9%

Survey-Wide Analysis Fact: By itself, type of grant awarded is not an important predictor of grantees' ratings of a philanthropic funder's impact on their organizations. However, ratings of impact on the grantee organization are higher for operating than program support grantees when those operating support grants are larger and longer term than what funders typically provide. For more information on these findings, please see CEP's report, *In Search of Impact: Practices and Perceptions in Foundations' Provision of Program and Operating Grants to Nonprofits*.

1: Comparative and trend data not available for event/sponsorship funding because this option was added to the survey in the fall of 2009. For the 106 funders for which data is available, the average percentage of grantees indicating they received event/sponsorship funding was 1 percent.

Grantee Characteristics (1)

Measure	Iowa West	Full Dataset Median	Regionally-Focused Funder Median
Operating Budget of Grantee Organization			
<i>Median budget</i>	\$1.1MM	\$1.4MM	\$1.1MM
< \$100K	16%	8%	9%
\$100K - \$499K	25%	20%	24%
\$500K - \$999K	7%	14%	15%
\$1MM - \$4.9MM	25%	29%	28%
\$5MM - \$24.9MM	20%	18%	16%
\$25MM and above	6%	10%	8%
Length of Establishment of Grantee Organizations			
<i>Median length of establishment</i>	36 years	24 years	24 years
Less than 5 years	7%	7%	7%
5 - 9 years	13%	13%	13%
10 -19 years	12%	22%	23%
20 - 49 years	30%	36%	36%
50 - 99 years	19%	12%	14%
100 years or more	18%	8%	8%

Grantee Characteristics (2)

Measure	Iowa West	Full Dataset Median	Regionally-Focused Funder Median
Length of Time Which Grantees Have Regularly Conducted the Funded Programs			
Less than 1 year	17%	16%	15%
1 - 5 years	43%	51%	48%
6 - 10 years	14%	14%	17%
More than 10 years	26%	19%	20%
Pattern of Grantees' Funding Relationship with the Foundation¹			
First grant received from the Foundation	21%	29%	N/A
Consistent funding in the past	54%	53%	N/A
Inconsistent funding in the past	25%	18%	N/A
Length of Funding Relationship with the Foundation²			
1 - 5 years	45%	53%	N/A
6 - 10 years	31%	27%	N/A
More than 10 years	23%	20%	N/A
Funding Status and Grantees Previously Declined Funding			
Percent of grantees currently receiving funding from the Foundation	79%	76%	80%
Percent of grantees previously declined funding by the Foundation	54%	32%	34%

Survey-Wide Analysis Fact: Consistently funded grantees rate funders' understanding of their organizations as well as impact on their organizations, fields and communities more positively than inconsistently funded grantees

1: Represents data from 101 funders. Regionally-Focused Funder data not available due to changes to the survey instrument. This question includes a "don't know" response option; 2 percent of Iowa West respondents answered "don't know", compared to 2 percent at the median funder, and 3 percent of respondents at the median regionally-focused funder.

2: Represents data from 101 funders. Regionally-Focused Funder data not available due to changes to the survey instrument. This question includes a "don't know" response option; 7 percent of Iowa West respondents answered "don't know", compared to 4 percent at the median funder, and 4 percent of respondents at the median regionally-focused funder.

Grantee Characteristics (3)

Measure	Iowa West	Full Dataset Median	Regionally-Focused Funder Median
Job Title of Respondents¹			
Executive Director	36%	46%	51%
Other Senior Management	11%	12%	12%
Project Director	10%	10%	9%
Development Director	11%	13%	12%
Other Development Staff	10%	8%	7%
Volunteer	7%	0%	1%
Other	14%	10%	8%
Gender of Respondents²			
Female	70%	63%	63%
Male	30%	37%	37%
Race/Ethnicity of Respondents³			
Caucasian/White	93%	80%	84%
African-American/Black	1%	7%	8%
Hispanic/Latino	2%	4%	3%
Asian (incl. Indian subcontinent)	2%	3%	1%
Multi-racial	1%	3%	2%
American Indian/Alaskan Native	0%	1%	1%
Pacific Islander	0%	0%	0%
Other	0%	1%	1%

1: Represents data from 78 funders. Regionally-Focused Funder data not available due to changes to the survey instrument.

2: In spring of 2009 CEP removed the word "optional" from this question but added an "other" response choice and a "prefer not to say" response choice. Previously this question was only infrequently skipped and so we have maintained comparative data in spite of the question change. In response to this question, a total of 6 percent of Iowa West respondents selected "other" or "prefer not to say," compared to 3 percent at the median funder.

3: In spring of 2009 CEP removed the word "optional" from this question but added a "prefer not to say" response choice. Previously this question was only infrequently skipped and so we have maintained comparative data in spite of the question change. In response to this question, a total of 5 percent of Iowa West respondents selected "prefer not to say," compared to 5 percent at the median funder.

Funder Characteristics

Measure	Iowa West	Full Dataset Median	Regionally-Focused Funder Median
Financial Information			
Total assets	\$320.7MM	\$243.0MM	\$367.9MM
Total giving	\$15.5MM	\$15.0MM	\$17.0MM
Funder Staffing¹			
Total staff (FTEs)	9	13	13
Percent of staff (FTEs) actively managing grantee relationships ²	56%	38%	N/A
Percent of staff who are program staff	33%	53%	50%
Grantmaking Processes			
Proportion of grants that are proactive ³	7%	42%	N/A
Proportion of grantmaking dollars that are proactive	46%	42%	50%

1: Excludes FTEs who are volunteers or unpaid staff members.

2: Includes data from 75 funders. Regionally-Focused Funder data not available due to changes to the survey instrument.

3: Includes data from 88 funders.

Source: Self-reported data provided by Iowa West and other GPR and Operational Benchmarking Report (OBR) subscribers from 2003-2012 survey rounds.

Funders in Dataset

The 284 philanthropic funders whose grantees CEP has surveyed are listed below. Those that were independently surveyed are denoted by an asterisk (*).

The Abell Foundation, Inc.*	The Clowes Fund	Gulf Coast Community Foundation of Venice	Mathile Family Foundation*	The Robin Hood Foundation
Adolph Coors Foundation*	College Access Foundation of California	Hall Family Foundation*	The McKnight Foundation	Rochester Area Community Foundation
Adessium Foundation	The Collins Foundation*	Hampton Roads Community Foundation	Medina Foundation	Rockefeller Brothers Fund
The Ahmanson Foundation*	The Colorado Health Foundation	Harold K.L. Castle Foundation	MetroWest Community Health	Rockefeller Foundation
Alaska Mental Health Trust Authority	The Colorado Trust	The Harry and Jeanette Weinberg Foundation, Inc	Care Foundation	Rollin M. Gerstacker Foundation*
Alfred P. Sloan Foundation*	The Columbus Foundation	Hartford Foundation for Public Giving	Meyer Memorial Trust*	Rose Community Foundation
Alliance for California Traditional Arts	and Affiliated Organizations	The Harvest Foundation of the Piedmont	Michael Reese Health Trust	Russell Family Foundation
Alphawood Foundation*	Community Foundation Silicon Valley	Health Foundation of Greater Cincinnati	The Minneapolis Foundation	Ruth Mott Foundation
Altman Foundation*	Community Memorial Foundation	The Heinz Endowments	Missouri Foundation for Health	S & G Foundation, Inc.*
The Ambrose Monell Foundation*	Community Technology Foundation of California	Helen Andrus Benedict Foundation	M. J. Murdock Charitable Trust	S. H. Cowell Foundation
Amelia Peabody Foundation*	Connecticut Health Foundation, Inc.	Henry H. Kessler Foundation	The Morris and Gwendolyn	Saint Luke's Foundation of Cleveland, Ohio
Amon G. Carter Foundation*	Conrad N. Hilton Foundation	Hess Foundation, Inc.*	Cafritz Foundation	The Saint Paul Foundation Inc.
Andersen Foundation*	Cultural Council of Santa Cruz County	Horace W. Goldsmith Foundation*	Ms. Foundation for Women	Santa Barbara Foundation
Ann Arbor Area Community Foundation	Daniels Fund*	The Horizon Foundation for New Jersey	Cafritz Foundation	SC Ministry Foundation
The Annenberg Foundation*	Danville Regional Foundation	Houston Endowment, Inc.	The Nathan Cummings Foundation	Sea Change Foundation
The Anschutz Foundation*	The David and Lucile Packard Foundation	HRJ Consulting	Nellie Mae Education Foundation	Shelton Family Foundation*
Arcus Foundation	Dekko Foundation, Inc.	Humanity United	The New Hampshire Charitable Foundation	The Sherman Fairchild Foundation, Inc.*
Arts Council Silicon Valley	Doris Duke Charitable Foundation	The Hyams Foundation, Inc.	New Profit, Inc.	The Shubert Foundation*
The Assisi Foundation of Memphis, Inc.	The Duke Endowment	Inter-American Foundation	New York Community Trust	The Skillman Foundation
The Atlantic Philanthropies	Dyson Foundation	J.A. & Kathryn Albertson Foundation*	New York State Health Foundation	The Skoll Foundation
AVI CHAI Foundation	E. Rhodes & Leona B. Carpenter Foundation*	J. Bulow Campbell Foundation*	Nina Mason Pulliam Charitable Trust	Sobrato Family Foundation
Baptist Community Ministries*	East Bay Community Foundation	The J. Willard and	Nord Family Foundation	Stuart Foundation
Barr Foundation	Eden Hall Foundation*	Alice S. Marriott Foundation*	Northern Rock Foundation	Surdna Foundation, Inc.
Beldon Fund	Edison International	Jacob and Valeria Langeloth Foundation	Northwest Area Foundation	Susan G. Komen for the Cure
Bill & Melinda Gates Foundation	The Educational Foundation of America	James Graham Brown Foundation, Inc.*	Northwest Health Foundation	T.L.L. Temple Foundation*
Blandin Foundation	El Pomar Foundation*	The James Irvine Foundation	Oak Foundation	Thrivent Financial for Lutherans Foundation
Blue Cross and Blue Shield of	Endowment for Health	The Jay and Rose	Omidyar Foundation	Tufts Health Plan Foundation
North Carolina Foundation	The Energy Foundation	Phillips Family Foundation*	One Foundation	United Way of Massachusetts Bay
Blue Cross Blue Shield of	The Erie Community Foundation	Jessie Ball duPont Fund	Ontario Trillium Foundation	Vancouver Foundation
Massachusetts Foundation	Eugene and Agnes E. Meyer Foundation	Jessie Smith Noyes Foundation	The Overbrook Foundation*	The Vermont Community Foundation
Blue Shield of California Foundation	Evelyn and Walter Haas, Jr. Fund	The Jim Joseph Foundation	Partnership for Excellence in	Victoria Foundation, Inc.*
Boston Foundation, Inc.	F. M. Kirby Foundation, Inc.*	The Josiah Macy, Jr. Foundation	Jewish Education (PEJE)	Virginia G. Piper Charitable Trust
Bradley Foundation*	The F.B. Heron Foundation	The John A. Hartford Foundation, Inc.	Paul G. Allen Foundations	W. K. Kellogg Foundation
Bradley-Turner Foundation*	The Fan Fox and	John D. and Catherine T.	Paul Hamlyn Foundation	Wachovia Regional Foundation
The Brainerd Foundation	Leslie R. Samuels Foundation*	MacArthur Foundation	Peninsula Community Foundation	Waite Family Foundation*
The Brinson Foundation	Fannie Mae Foundation	John H. and Wilhelmina D. Harland	The Pears Foundation	The Wallace Foundation
The Broad Foundation	First 5 Alameda	Charitable Foundation, Inc.	The Peter and	Walter & Elise Haas Fund
The Brown Foundation	County – Every Child Counts	John P. McGovern Foundation*	Elizabeth C. Tower Foundation	Wayne & Gladys Valley Foundation
Bush Foundation	The Ford Family Foundation	The John R. Oishei Foundation	PetSmart Charities	Weingart Foundation*
California Community Foundation	The Ford Foundation	John S. and James L. Knight Foundation	The Pew Charitable Trusts*	Wellington Management Charitable Fund
The California Endowment	France-Merrick Foundation*	Kalamazoo Community Foundation	Philadelphia Foundation	Wilburforce Foundation
California HealthCare Foundation	Friends Provident Foundation	Kansas Health Foundation	The Pittsburgh Foundation	William Caspar Graustein Memorial Fund
The California Wellness Foundation*	The Frist Foundation*	Kate B. Reynolds Charitable Trust*	Polk Bros. Foundation	The William and Flora Hewlett Foundation
The Cannon Foundation, Inc.*	The Fund for New Jersey	Kendeda Fund	Pritzker Foundation*	The William K. Warren Foundation*
Caring for Colorado Foundation	The GAR Foundation	The Kresge Foundation	PSEG Foundation and	William Penn Foundation
Carnegie Corporation of New York	Gates Family Foundation*	Kronkosky Charitable Foundation	Corporate Responsibility Department	The William Randolph Hearst Foundations*
Carrie Estelle Doheny Foundation*	Gaylor and Dorothy	The Lenfest Foundation, Inc.*	Public Welfare Foundation*	The William Stamps Farish Fund*
The Case Foundation	Donnelley Foundation	Levi Strauss Foundation	Quantum Foundation	William T. Kemper Foundation*
Central Indiana Community Foundation	General Mills Foundation	Lloyd A. Fry Foundation	The Ralph M. Parsons Foundation*	Williamsburg Community
The Champlin Foundations*	The George Gund Foundation	Longwood Foundation	Raskob Foundation for	Health Foundation
Charles and Helen Schwab Foundation	The George S. and Dolores	The Louis Calder Foundation*	Catholic Activities, Inc.	Windgate Charitable Foundation, Inc.*
Charles and Lynn Schusterman	Dore Eccles Foundation*	Lucile Packard Foundation	Rasmuson Foundation	Winter Park Health Foundation
Family Foundation	Geraldine R. Dodge Foundation	for Children's Health	The Raymond John Wean Foundation	Woods Fund of Chicago
Charles Stewart Mott Foundation	The Gill Foundation	Lumina Foundation for Education, Inc.	Resources Legacy Fund	Yad Hanadiv
The Chicago Community Trust	The Goizueta Foundation	Maine Community Foundation	The Rhode Island Foundation	Z. Smith Reynolds Foundation, Inc.
The Christensen Fund	Gordon and Betty Moore Foundation	Maine Health Access Foundation	Richard & Rhoda Goldman Fund	Zeist Foundation
Citi Foundation	Grable Foundation	Marguerite Casey Foundation	Richard King Mellon Foundation*	
The Clark Foundation*	Grand Rapids Community Foundation	Marin Community Foundation	The Robert Wood Johnson Foundation	
Claude Worthington Benedum Foundation	The Greater Cincinnati Foundation	Mary Reynolds Babcock Foundation		
The Cleveland Foundation				

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Mission

To provide data and create insight so philanthropic funders can better define, assess, and improve their effectiveness – and, as a result, their intended impact.

Vision

We seek a world in which pressing social needs are more effectively addressed. We believe improved performance of philanthropic funders can have a profoundly positive impact on nonprofit organizations and the people and communities they serve.

Although our work is about measuring results, providing useful data, and improving performance, our ultimate goal is improving lives. We believe this can only be achieved through a powerful combination of dispassionate analysis and passionate commitment to creating a better society.

CEP's research and creation of comparative data sets leads to the development of assessment tools, publications serving the philanthropic funder field, and programming. CEP's research initiatives focus on several subjects, including:

Research Focus	CEP Publication
Performance Assessment	<i>Indicators of Effectiveness: Understanding and Improving Foundation Performance</i> (2002)
	<i>Assessing Performance at the Robert Wood Johnson Foundation: A Case Study</i> (2004)
	<i>The State of Foundation Performance Assessment: A Survey of Foundation CEOs</i> (2011)
Funder Strategy	<i>Beyond the Rhetoric: Foundation Strategy</i> (2007)
	<i>Lessons from the Field: Becoming Strategic: The Evolution of the Flinn Foundation</i> (2009)
	<i>The Essentials of Foundation Strategy</i> (2009)
	<i>Lessons from the Field: Striving for Transformative Change at the Stuart Foundation</i> (2009)
	<i>Rhetoric versus Reality: A Strategic Disconnect at Community Foundations</i> (2011)
Funder Governance	<i>Beyond Compliance: The Trustee Viewpoint on Effective Foundation Governance</i> (2005)
Funder-Grantee Relationships	<i>Listening to Grantees: What Nonprofits Value in Their Foundation Funders</i> (2004)
	<i>Foundation Communications: The Grantee Perspective</i> (2006)
	<i>In Search of Impact: Practices and Perceptions in Foundations' Provision of Program and Operating Grants to Nonprofits</i> (2006)
	<i>Luck of the Draw</i> (2007)
	<i>More than Money: Making a Difference with Assistance Beyond the Grant</i> (2008)
	<i>Working with Grantees: The Keys to Success and Five Program Officers Who Exemplify Them</i> (2010)
	<i>A Time of Need: Nonprofits Report Poor Communication and Little Help from Foundations During the Economic Downturn</i> (2010)
	<i>Lessons from the Field: From Understanding to Impact</i> (2010)
	<i>Grantees Report Back: Helpful Reporting and Evaluation Processes</i> (2011)
	<i>Can Feedback Fuel Change at Foundations?</i> (2011)
Managing Operations	<i>Lessons from the Field: Improving the Experience at the David and Lucile Packard Foundation</i> (2008)
	<i>Lessons from the Field: Aiming for Excellence at the Wallace Foundation</i> (2008)

CEP provides philanthropic funder leaders with assessment tools – utilizing comparative data – that inform performance assessment:

- **Grantee Perception Report® (GPR):** provides CEOs, boards, and staff with comparative data on grantee perceptions of funder performance on a variety of dimensions
- **Applicant Perception Report (APR):** a companion to the GPR that provides comparative data from surveys of declined grant applicants
- **Staff Perception Report (SPR):** explores philanthropic funder staff members' perceptions of funder effectiveness and job satisfaction on a comparative basis
- **Operational Benchmarking Report (OBR):** provides comparative data, relative to a selected peer group of funders, on aspects of philanthropic funder operations – including organization staffing, program officer workload, grant processing times, and administrative costs
- **Stakeholder Assessment Report (STAR):** delivers insight about a funder's effectiveness by surveying stakeholders a funder seeks to influence as part of its strategy
- **Donor Perception Report (DPR):** creates insight, on a comparative basis, about donors' perceptions of the community foundations to and through which they contribute or establish funds
- **Strategy Landscape Tool (SLT):** an online interactive visualization tool, developed by Monitor Institute and delivered with CEP, that allows users to easily see and understand grantmaking strategies and patterns within and across institutions so they can make better decisions in pursuit of their goals

- ◆ This report was produced for Iowa West Foundation by the Center for Effective Philanthropy in September, 2012.

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