

CONFIDENTIAL

Grantee Perception Report®

prepared for

College Access Foundation of California

June 2011

VERSION 08/01/2011



THE CENTER FOR
EFFECTIVE PHILANTHROPY

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Executive Summary

The College Access Foundation of California (“College Access”) receives more positive ratings across a number of measures in this report than other funders whose grantees CEP has surveyed. In particular, the Foundation receives more positive ratings for its impact on grantees’ fields and organizations, relationships with grantees, and the helpfulness of its processes. Grantees speak very positively about the Foundation, describing it as “innovative” and “a leader in the field.”

College Access grantees perceive the Foundation to have a strong impact on and understanding of their fields of work. Grantees describe the work of College Access as “invaluable”, and rate the Foundation higher than typical for most field-related measures. However, grantees rate only typically for the Foundation’s effect on public policy, and grantees indicate that the Foundation could increase its impact by taking on a larger role in public policy, the media, and before the public.

Grantees rate the Foundation higher than typical for its impact on and understanding of their organizations, but many express their need for increased operating support. Although a proportion of the Foundation’s larger and longer than typical grants fund operating support, one grantee says, “It meets minimum requirements but not enough to cover all the work required.” Moreover, College Access grantees rate the Foundation’s impact on sustaining the funded work lower than most Foundations whose grantees CEP has surveyed.

The Foundation receives higher than typical ratings for the helpfulness of its reporting and evaluation process, but some grantees express the need for additional support. Several grantees comment on the Foundation’s “time consuming” requirements, and while many grantees praise the rigor of the Foundation’s reporting and evaluation process, they also indicate that they would benefit from additional technical assistance or discussions with staff about their reports/evaluations.

A higher than typical proportion of College Access grantees report receiving non-monetary assistance in the most helpful patterns from the Foundation and many ask for even more non-monetary assistance. In grantees’ suggestions, many request more opportunities to collaborate with other grantees and the Foundation’s field-related seminars/forums/convenings are frequently considered the most valuable forms of non-monetary assistance.

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Background

- ♦ 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 College Access Foundation of California (“College Access”) during February and March 2011. The details of College Access’ survey are as follows:

Survey	Survey Period	Fiscal Year of Surveyed Grantees	Number of Grantees Surveyed	Number of Responses Received	Survey Response Rate ¹
College Access	February and March 2011	2010	114	73	64%

- ♦ 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.

Methodology – Comparative Data

- College Access' 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 seven years. Please see Appendix B for a list of all funders whose grantees CEP has surveyed.

Full Comparative Set	
Grantee Responses	38,797 grantees
Philanthropic Funders	264 funders

- College Access is also compared to a cohort of 15 funders. The 15 funders that comprise this group are:

Cohort Funders	
Altman Foundation	Stuart Foundation
College Access Foundation of California	Surdna Foundation
Claude Worthington Benedum Foundation	The California Endowment
Eugene and Agnes E. Meyer Foundation	The James Irvine Foundation
Evelyn and Walter Haas, Jr. Fund	The Kresge Foundation
Marguerite Casey Foundation	The Skillman Foundation
Meyer Memorial Trust	Walter & Elise Haas Fund
S. H. Cowell Foundation	

- Within this report, CEP describes the comparison between College Access grantee ratings and grantee ratings of other funders based on the percentile rank of College Access. On measures with a 1-7 scale, grantee ratings for College Access 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 College Access 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, College Access awards larger and longer grants, and awards a larger than typical proportion of scholarship/fellowship grants.

Survey Item	College Access	Full Dataset Median	Cohort Funder Median
Grant Size			
Median grant size	\$200K	\$60K	\$146K
Grant Length			
Average grant length	2.8 years	2.1 years	2.2 years
Percent of grantees receiving multi-year grants	79%	49%	59%
Type of Support			
Percent of grantees receiving operating support	0%	20%	25%
Percent of grantees receiving program/project support	16%	64%	51%
Percent of grantees receiving scholarship/fellowship grants	84%	2%	8%
Percent of grantees receiving other types of support	0%	14%	16%

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, College Access grantees are smaller organizations that are less likely to be first time-grant recipients.

Survey Item	College Access	Full Dataset Median	Cohort Funder Median
Budget of Funded Organizations			
Typical organizational budget	\$0.8MM	\$1.4MM	\$1.3MM
Duration of Funded Program and Grantee Organization			
Programs conducted 6 years or more	58%	32%	38%
Median length of establishment of grantee organizations	16 years	24 years	19 years
First-Time Grantees¹			
Percentage of first-time grants	23%	31%	N/A

¹: Represents data from 55 funders.

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.

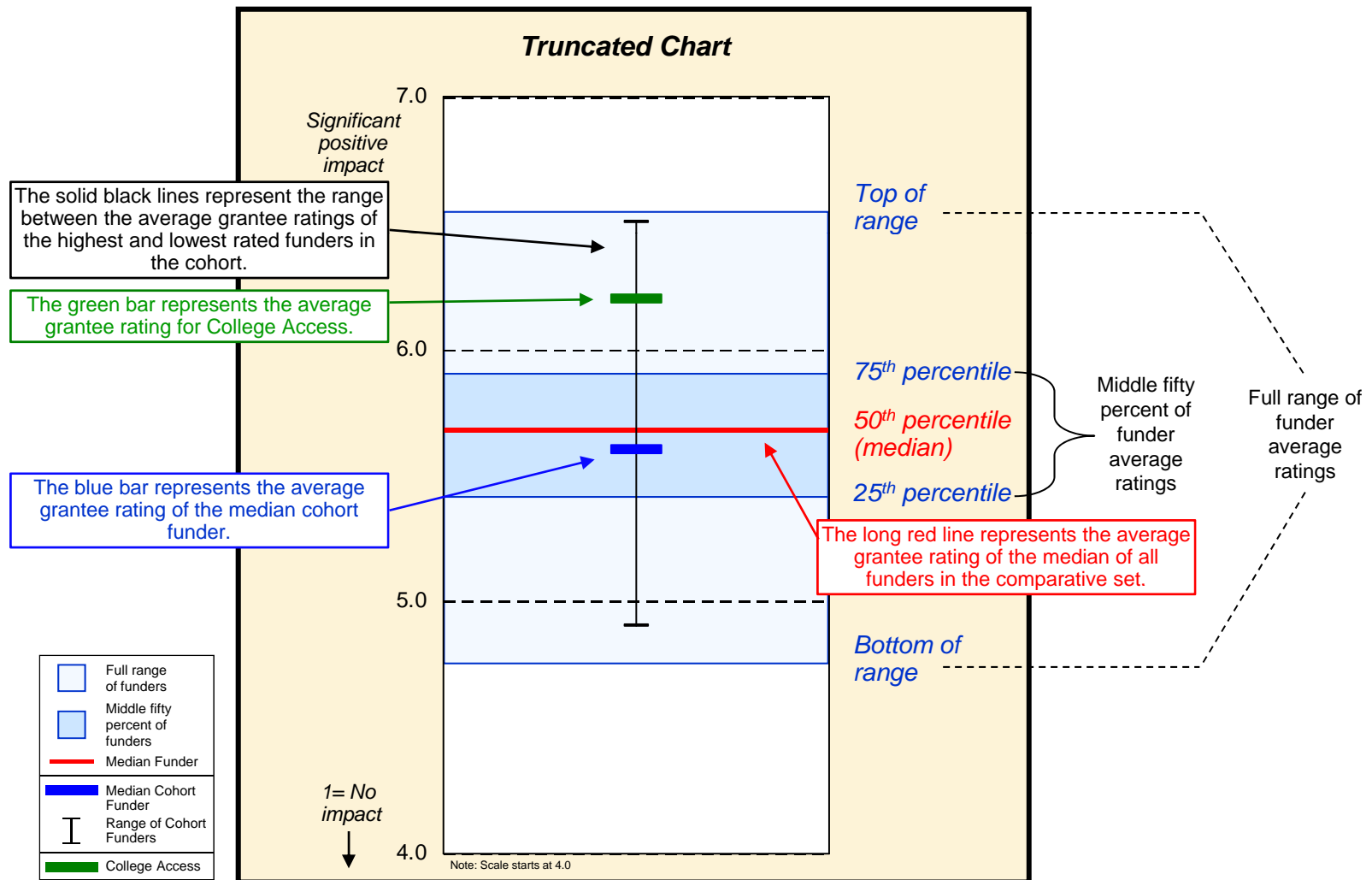
Structural Characteristics of Funders

- ◆ 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 awarded per professional program staff full-time employee at College Access is smaller than that of the typical funder.

Survey Item	College Access	Full Dataset Median	Cohort Funder Median
Program Staff Load			
Dollars awarded per professional program staff full-time employee	\$3.5MM	\$3.6MM	\$3.6MM
Applications per professional program full-time employee	26 applications	39 applications	31 applications
Grants awarded per professional program full-time employee	17 grants	29 grants	22 grants
Active grants per professional program full-time employee	43 grants	48 grants	53 grants

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 College Access, over a background that shows percentiles for the average ratings for the full comparative set of 264 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.**



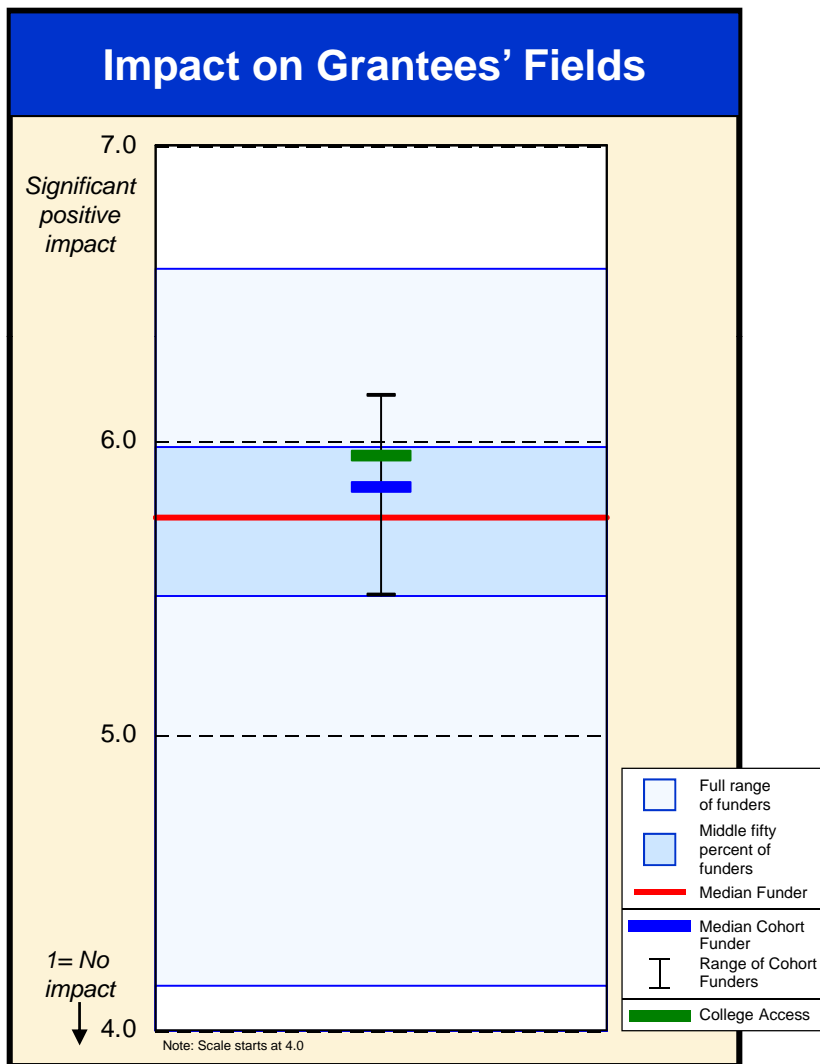
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Impact on Grantees' Fields

On impact on grantees' fields, College Access is rated:

- above 71 percent of funders
- above 71 percent of funders in the cohort



Selected Grantee Comments

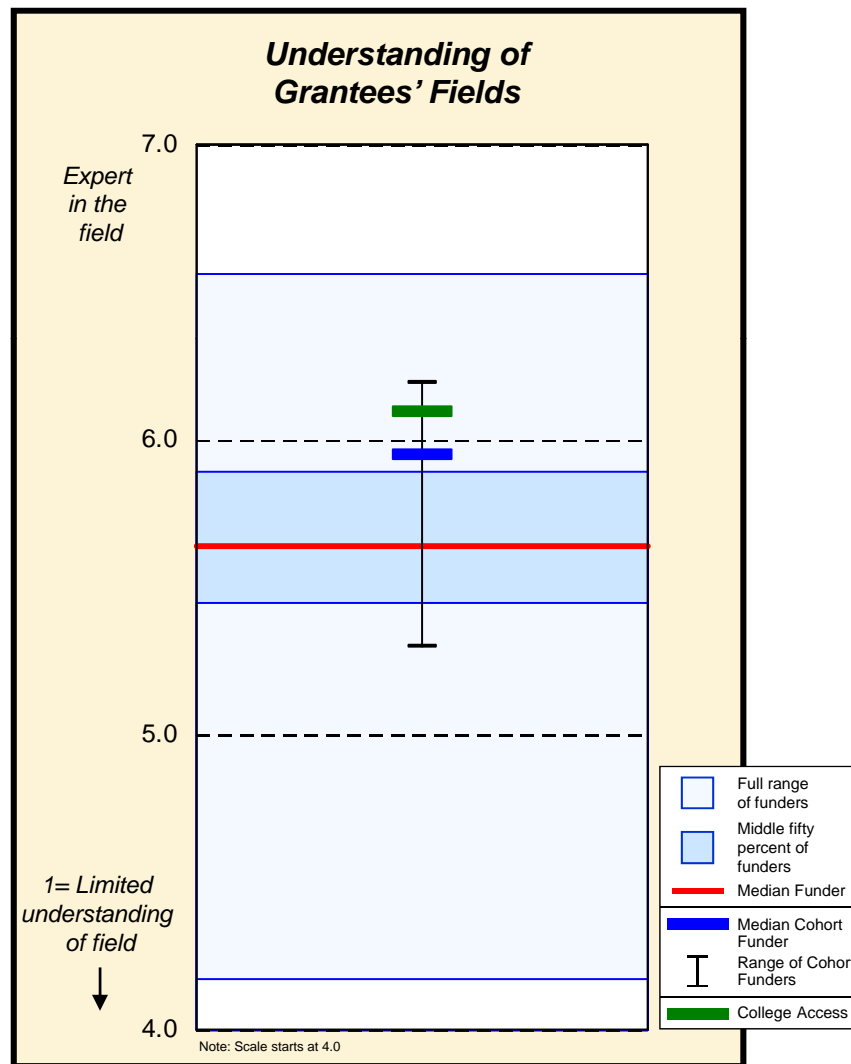
- ♦ *“The research they are conducting is very informative on how to most effectively address the higher education inequities. Bringing together grantees is also very impactful as it facilitates sharing of best practices and networking. Due to its size and financial resources its impact is quite significant.”*
- ♦ *“As a leader in the field, CAF is very involved in best practice sharing and using data to make changes to increase the foundation's efficacy as well as to inform the field as a whole.”*
- ♦ *“It's great they provide funding, but the manner in which they have developed their framework is shortsighted and will not produce long term change.”*
- ♦ *“They have been great partners in sharing their information in the field, so we can use that as a baseline of comparison. They care about the welfare of students in CA let alone nationally, the work to support CA is invaluable.”*

Note: This question includes a “don't know” response option; 3 percent of College Access respondents answered “don't know”, compared to 9 percent at the median funder, and 8 percent of respondents at the median cohort funder. Chart does not show data from one funder whose field impact rating is less than 4.0.

Understanding of Grantees' Fields

On understanding of grantees' fields, College Access is rated:

- above 91 percent of funders
- above 79 percent of funders in the cohort



Note: This question includes a "don't know" response option; 0 percent of College Access respondents answered "don't know", compared to 6 percent at the median funder, and 5 percent of respondents at the median cohort funder.

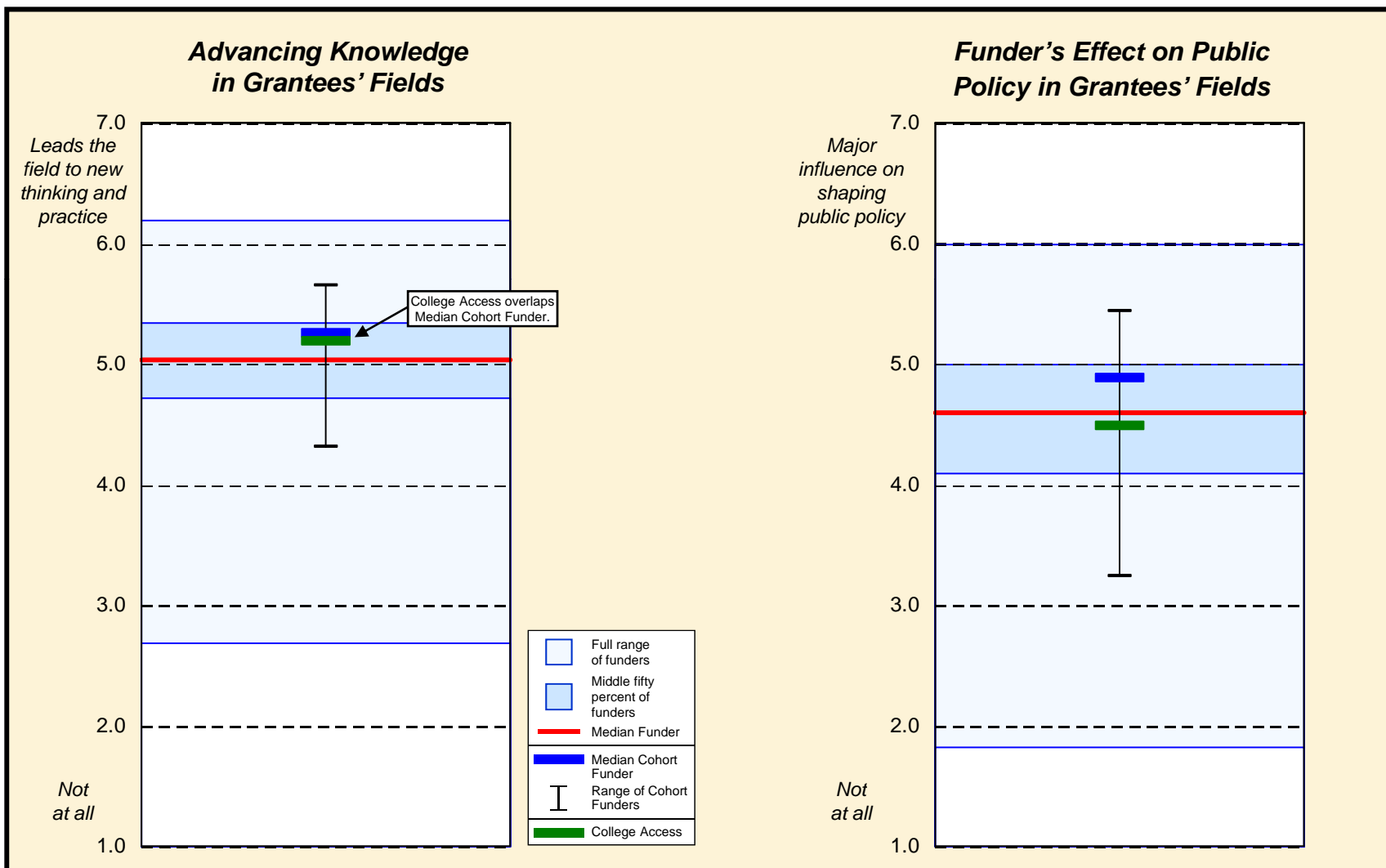
Advancing Knowledge in Fields and Effect on Public Policy

On advancement of knowledge in grantees' fields, College Access is rated:

- above 64 percent of funders
- below 57 percent of funders in the cohort

On effect on public policy in grantees' fields, College Access is rated:

- below 57 percent of funders
- below 79 percent of funders in the cohort

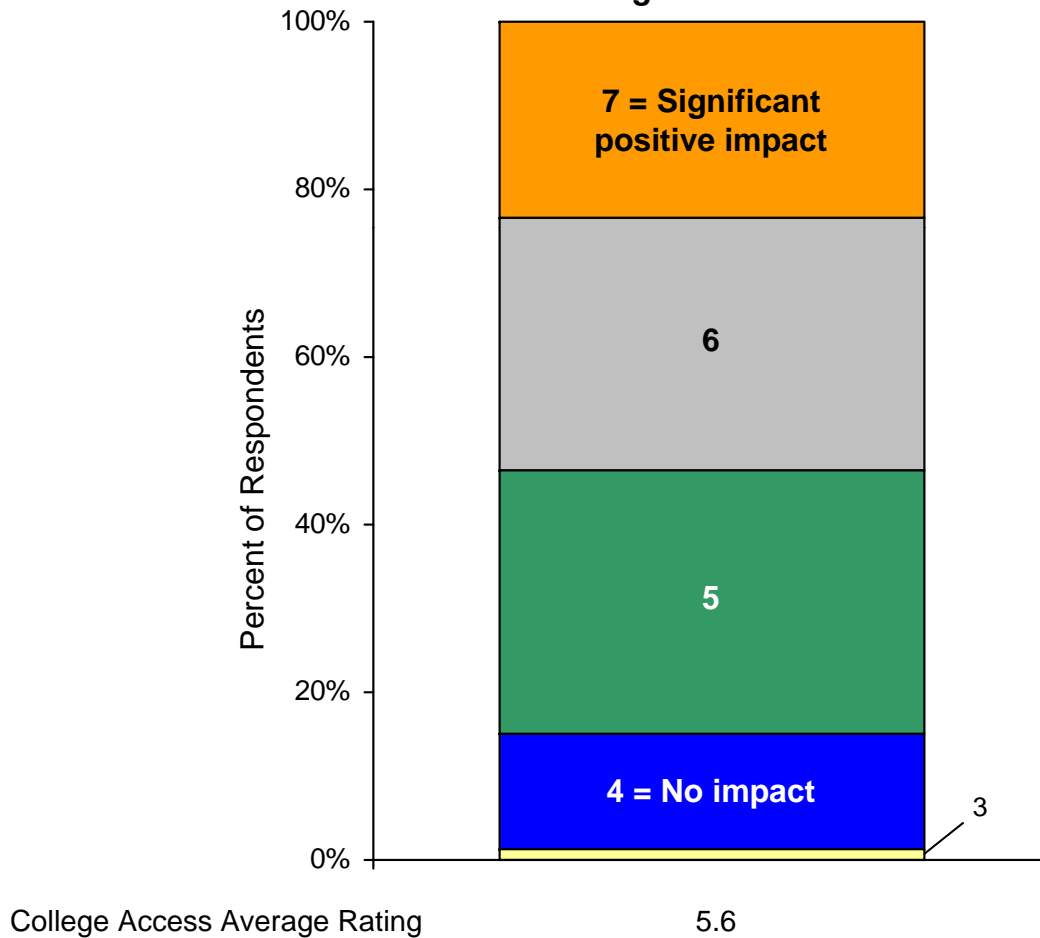


Note: The questions depicted on these charts include a "don't know" response option. In the left-hand chart, 12 percent of College Access respondents answered "don't know", compared to 25 percent at the median funder, and 19 percent of respondents at the median cohort funder. In the right-hand chart, 36 percent of College Access respondents answered "don't know", compared to 40 percent at the median funder, and 39 percent of respondents at the median cohort funder.

Impact of Foundation's Public Profile

Grantees were asked what type of impact the Foundation would have on their organization if it took on a higher profile in the media, before the public, and with policy decision-makers, where 1 = "Significant negative impact", 4 = "No impact", and 7 = "Significant positive impact." Over 80 percent of grantees indicated that a higher profile would have a positive impact.

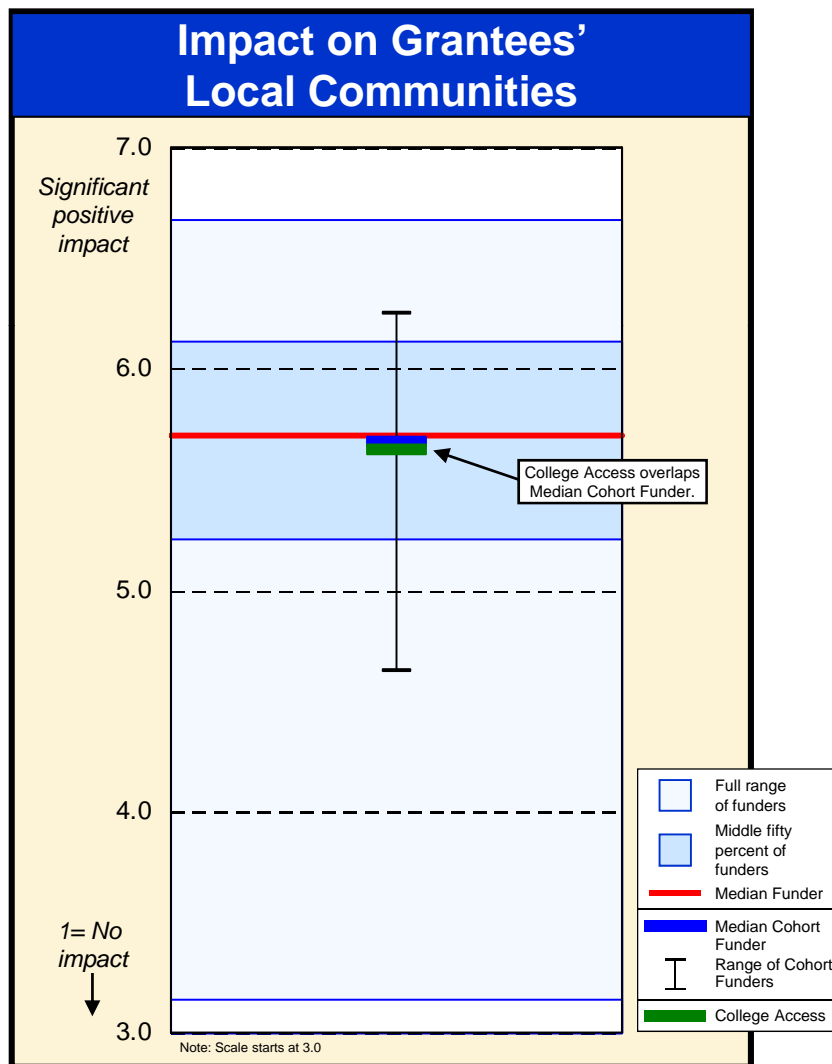
"If the Foundation took on a higher profile, what type of impact do you think it would have on your organization?"



Impact on Grantees' Local Communities

On impact on grantees' local communities, College Access is rated:

- below 54 percent of funders
- below 57 percent of funders in the cohort



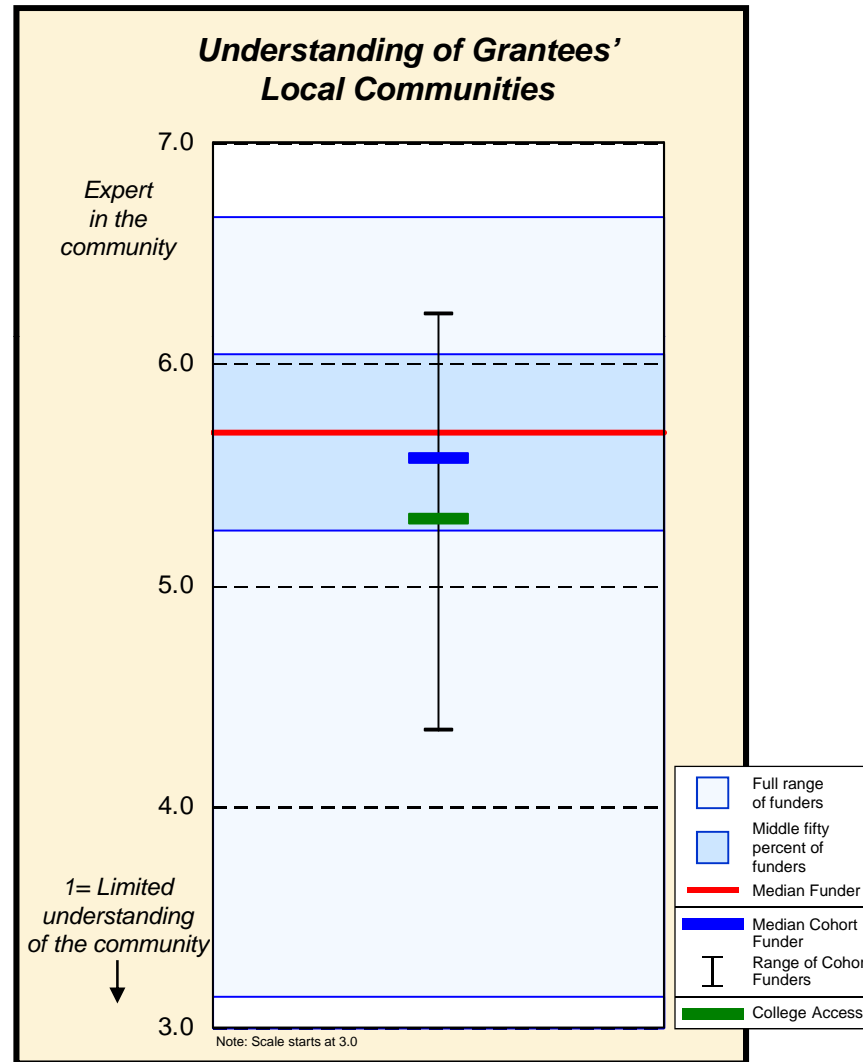
Selected Grantee Comments

- ♦ *“The Foundation has had a major impact in the way our community views college access and success. Their support has been a springboard to major regional initiatives to increase college access for low income students. Their leadership has motivated the bringing together of key community leaders and stakeholders in economic development and education.”*
- ♦ *“The scholarship grant has provided the financial support that our low income - first generation students need if they are to succeed in post secondary education. The partnership our program has with the schools the program serves has strengthened because of the scholarship component, resulting in a greater impact in the community.”*

Understanding of Grantees' Local Communities

On understanding of grantees' local communities, College Access is rated:

- below 72 percent of funders
- below 71 percent of funders in the cohort



Note: This question includes a “don’t know/not applicable” response option; 3 percent of College Access respondents answered “don’t know/not applicable”, compared to 13 percent at the median funder, and 12 percent of respondents at the median cohort funder.

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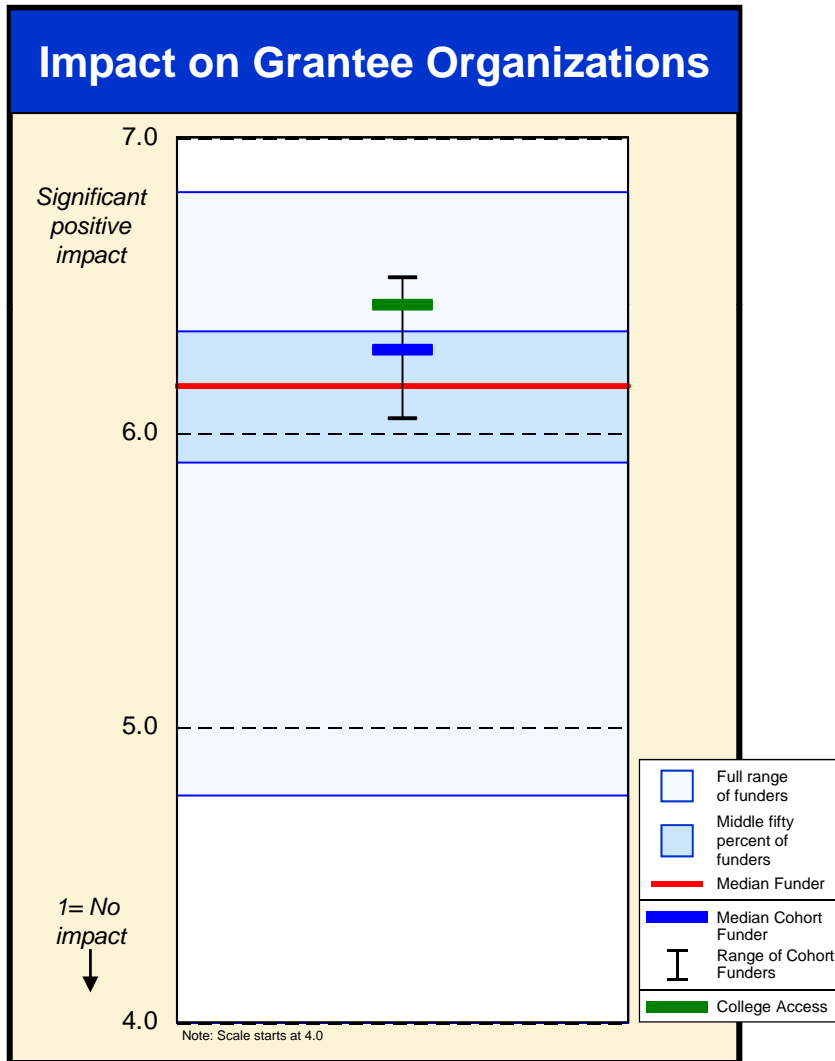
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Impact on Grantee Organizations

On impact on grantee organizations, College Access is rated:

- above 85 percent of funders
- above 79 percent of funders in the cohort



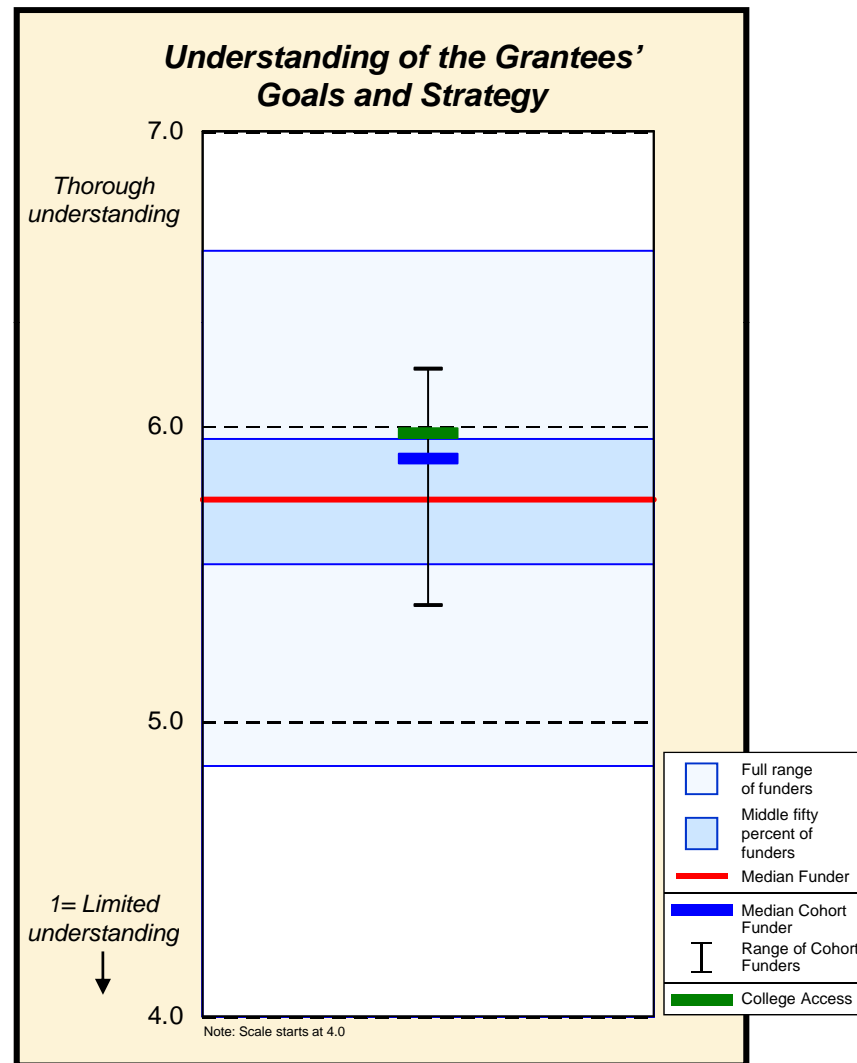
Selected Grantee Comments

- ♦ *“We did not have a scholarship component before getting funds from the Foundation. Our scholarship component complements the work we do to get students to college. Not only are we providing academic and college advising assistance to students, but we are now able to support them financially, which is so needed when in college.”*
- ♦ *“The Foundation, through its grant awards over the past [several] years, has enabled our program to raise its visibility, solidify its reputation, and increase its standing in the local education community. In addition, and more importantly, it has helped us help more than 100 students attend and persist in college.”*
- ♦ *“Because we personalize our scholarships in a very rigorous fashion we utilize a lot of staff time to distribute funds as effectively as possible. Staff time is expensive. We are certain that the monies for operating support does not cover the full measure of work done by our staff. That said the monies for our scholars is so valuable that we will continue to absorb the additional work to keep this extraordinary resource.”*

Understanding of Grantees' Goals and Strategy

On understanding of grantees' goals and strategy, College Access is rated:

- above 78 percent of funders
- above 77 percent of funders in the cohort

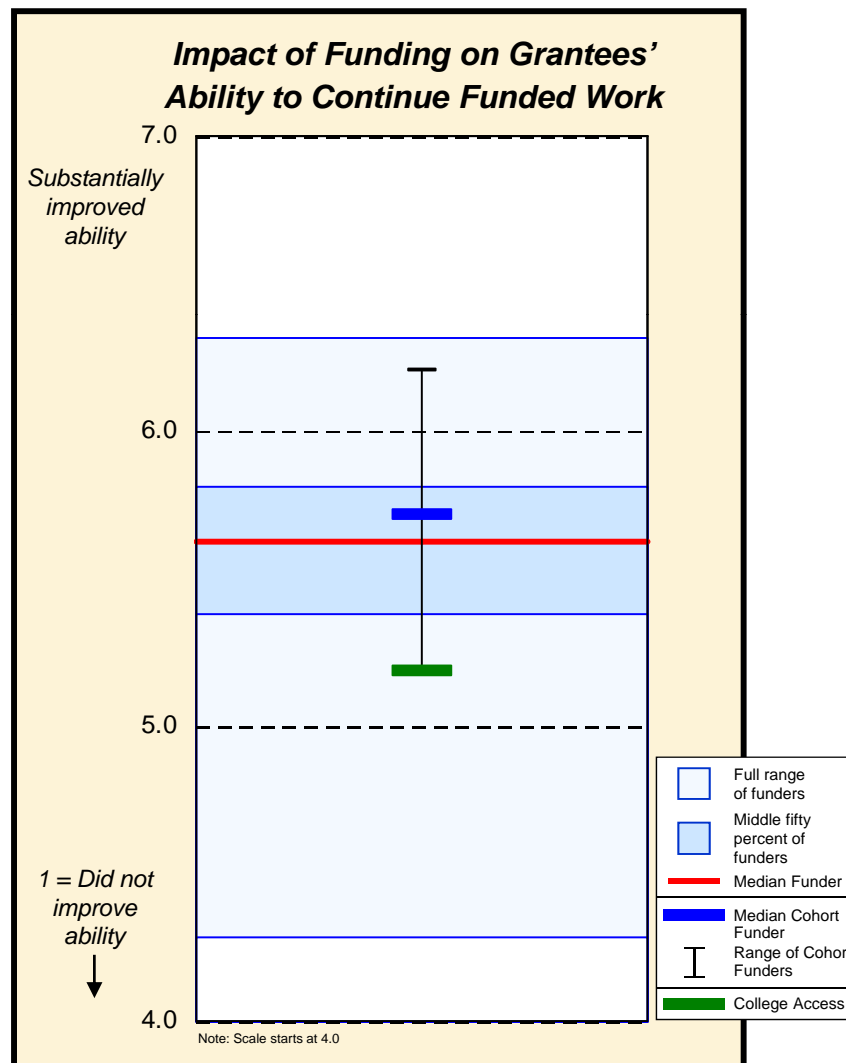


Note: This question includes a "don't know" response option; 1 percent of College Access respondents answered "don't know", compared to 7 percent at the median funder, and 5 percent of respondents at the median cohort funder.

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, College Access is rated:

- below 88 percent of funders
- lower than all other funders in the cohort

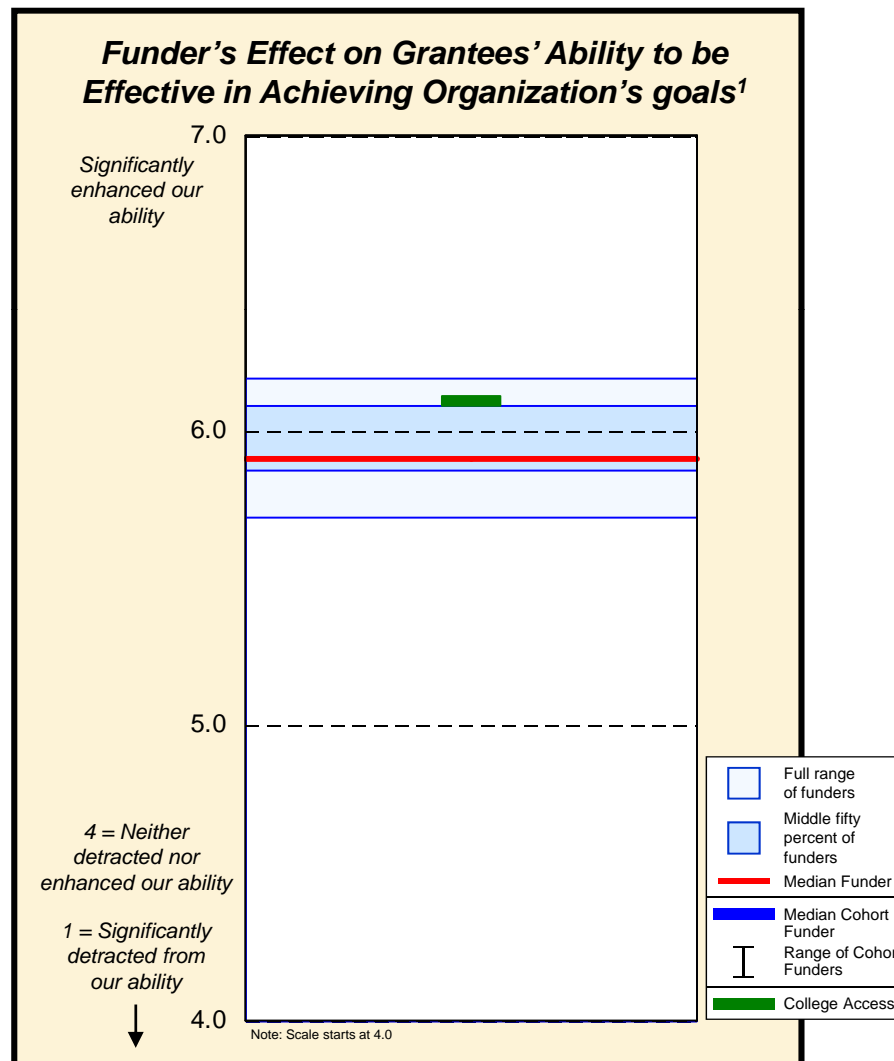


Note: This question includes a "don't know/not applicable" response option; 4 percent of College Access respondents answered "don't know/not applicable", compared to 9 percent at the median funder, and 9 percent of respondents at the median cohort funder.

Effect on Grantees Achieving Their Goals

On how grantees' experience with the Foundation affected their ability to be effective in achieving their organization's goals, College Access is rated:

- above 80 percent of the 11 funders in CEP's comparative dataset



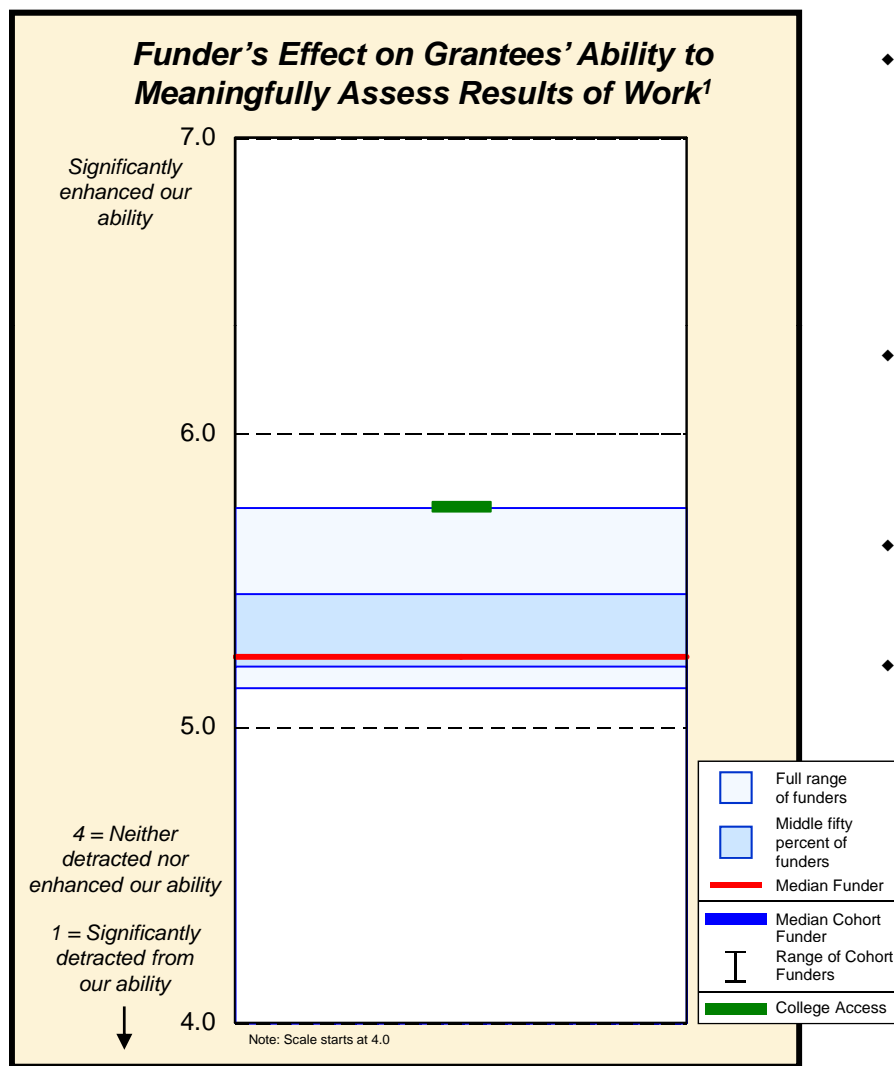
1: Represents data from 11 funders.

Note: Cohort funder data not available due to changes to the survey instrument.

Effect on Grantees Assessing Results

On the effect of the Foundation on grantees' ability to meaningfully assess the results of the work funded by the grant, College Access is rated:

- higher than all 11 funders in CEP's comparative dataset



Selected Grantee Comments

- ♦ “In terms of assessment, their emphasis has been on accessing financial data which is perhaps more meaningful to them as an organization than to us as grantees. Because we are first an education group, our priorities in assessment, academic proficiency as a major factor in ensuring college success, are not completely aligned with the foundation's concern about financial integrity of awards. We are in the same ballpark, but not on the same base.”
- ♦ “The data collection required by the grant has allowed our organization to really measure our goals for all our programs. We have been able to track our students and acquire follow-up information that has helped us to guide them and/or improve in areas they are finding challenging while in college.”
- ♦ “I think the data collection process was a good step...but I feel that we haven't been able to specifically use that data to benchmark ourselves or our students yet.”
- ♦ “We already tracked our students enrollment and status in school. However, the Foundation's resources helped us verify the numbers. The Foundation also required more detail in data collection, which while time consuming proves to be helpful in keeping track of our Scholars.”

Behind the Numbers – Variation by Discussing How to Evaluate the Funded Work: Grantees that report having exchanged ideas with the Foundation about how their organization would assess the results of the funded work rated the Foundation more positively on a number of measures including the helpfulness of the selection process and most relationships measures.

Note: This question was only asked of those grantees that indicated they exchanged ideas with the Foundation regarding how their organization would assess the results of the work funded by the grant. For College Access, 79 percent of grantees indicated that they had exchanged ideas about how to assess the results of the work, compared to 65 percent at the median funder.

1: Represents data from 11 funders.

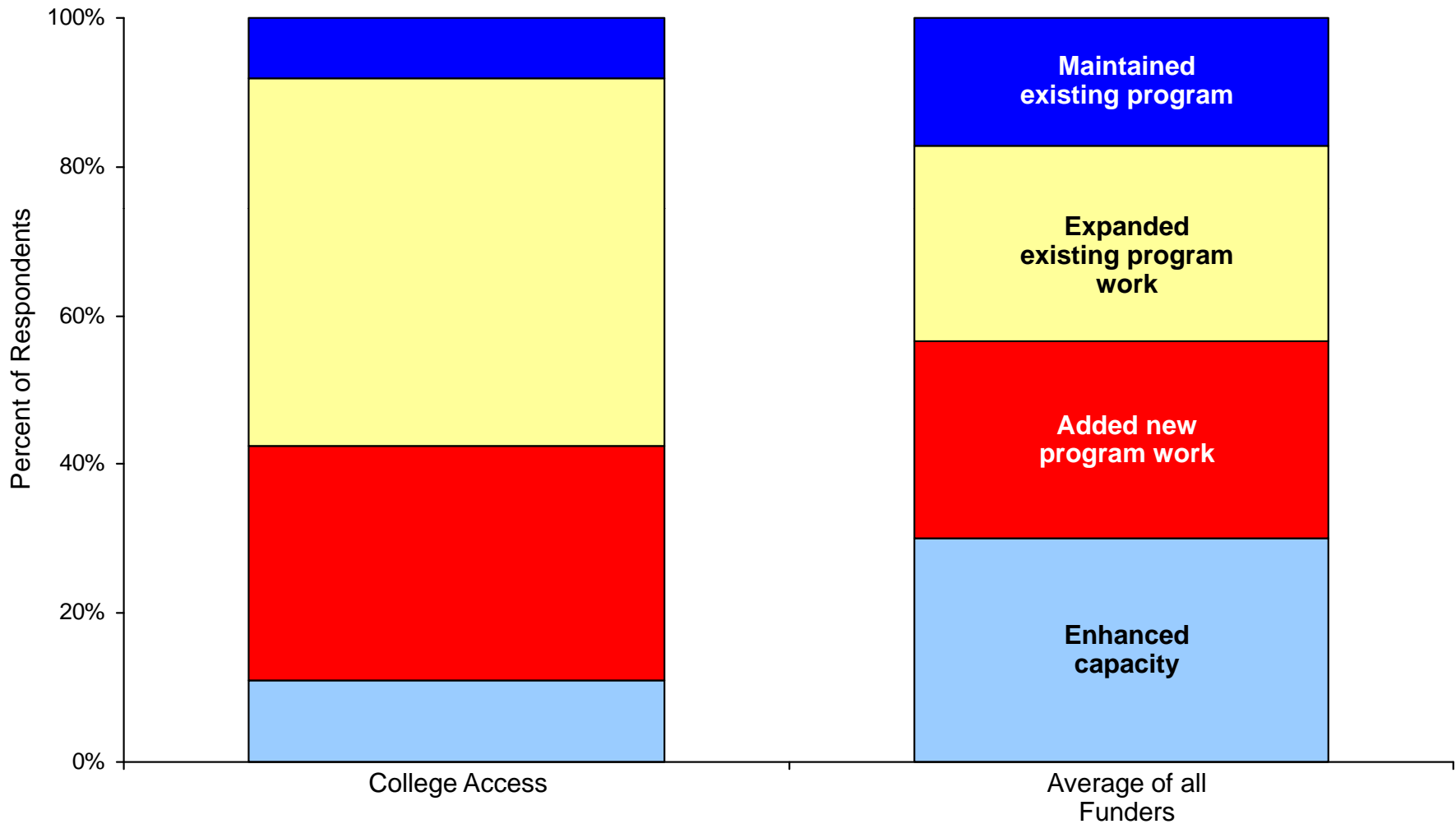
Note: Cohort funder data not available due to changes to the survey instrument.

Grant Effect

The proportion of College Access grantees that report expanding existing program work as the primary effect of their grant is:

- larger than that of the typical funder

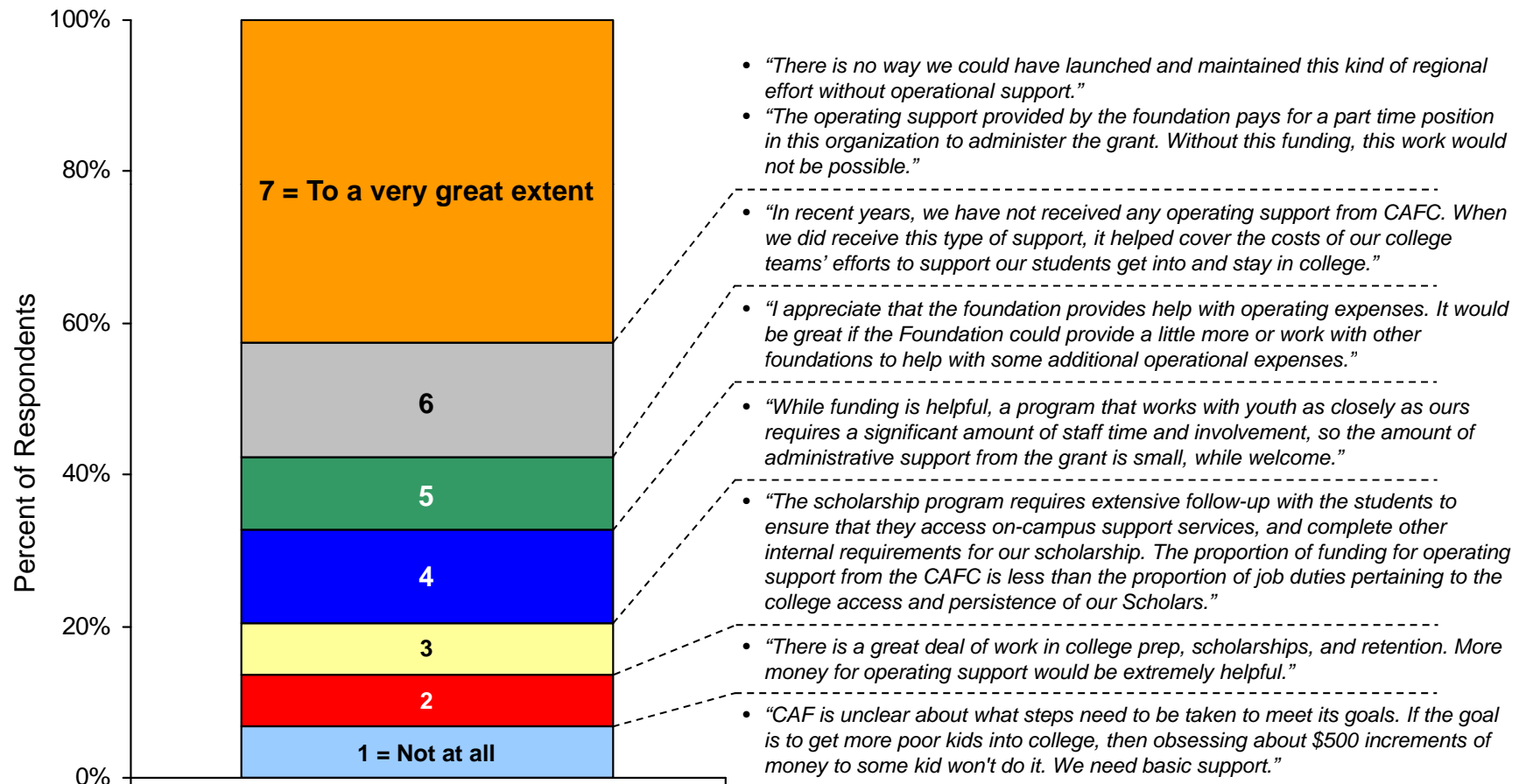
Primary Effect of Grant on Grantee's Organization



Helpfulness of Operating Support

Grantees were asked, given the Foundation's requirement for grant applicants, to what extent they found the proportion of funding for operating support helpful to their efforts, where 1 = "Not at all" and 7 = "To a very great extent." A sample of comments are included below.

"To what extent did you find the proportion of funding for operating support helpful to your college access and persistence efforts?"



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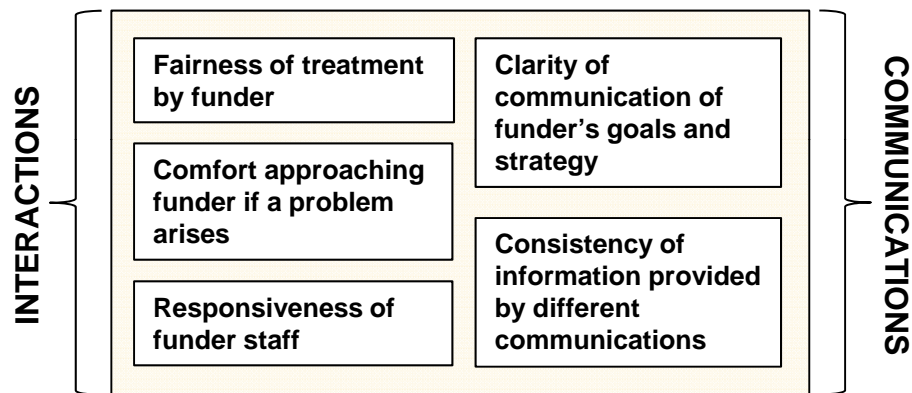
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Funder-Grantee Relationships Summary

On this summary of key components of funder-grantee relationships, College Access is rated:

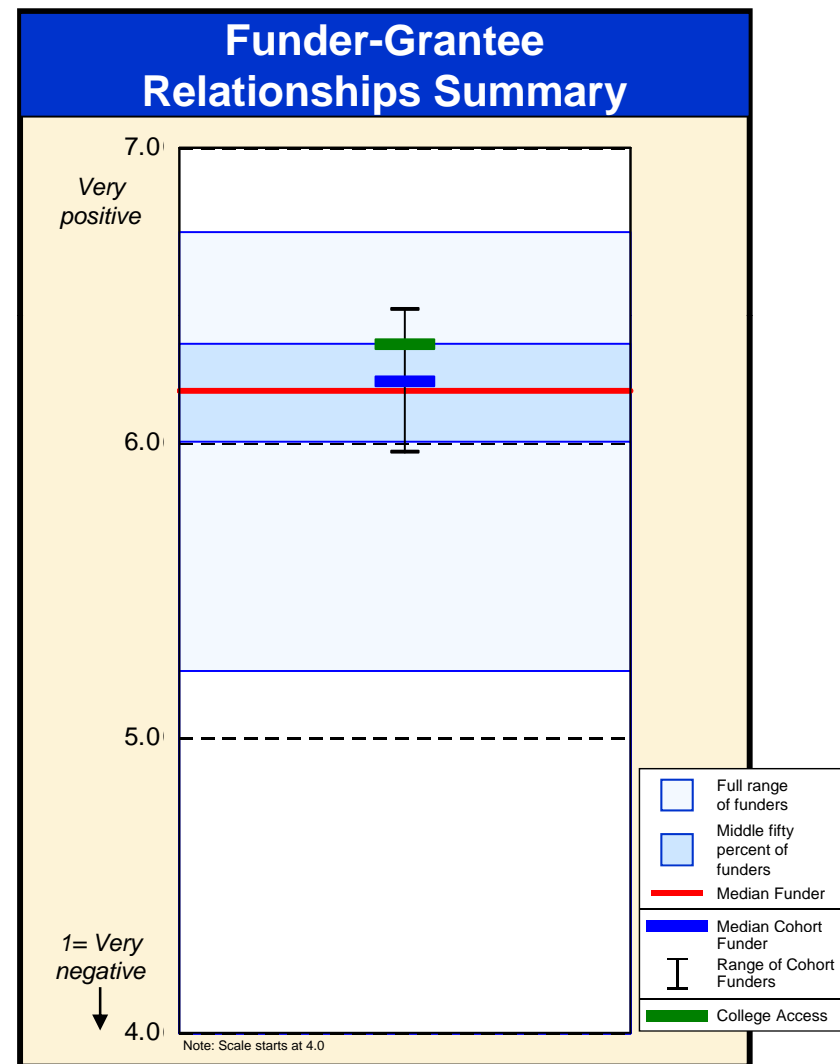
- above 72 percent of funders
- above 82 percent of funders in the cohort

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, College Access is rated:

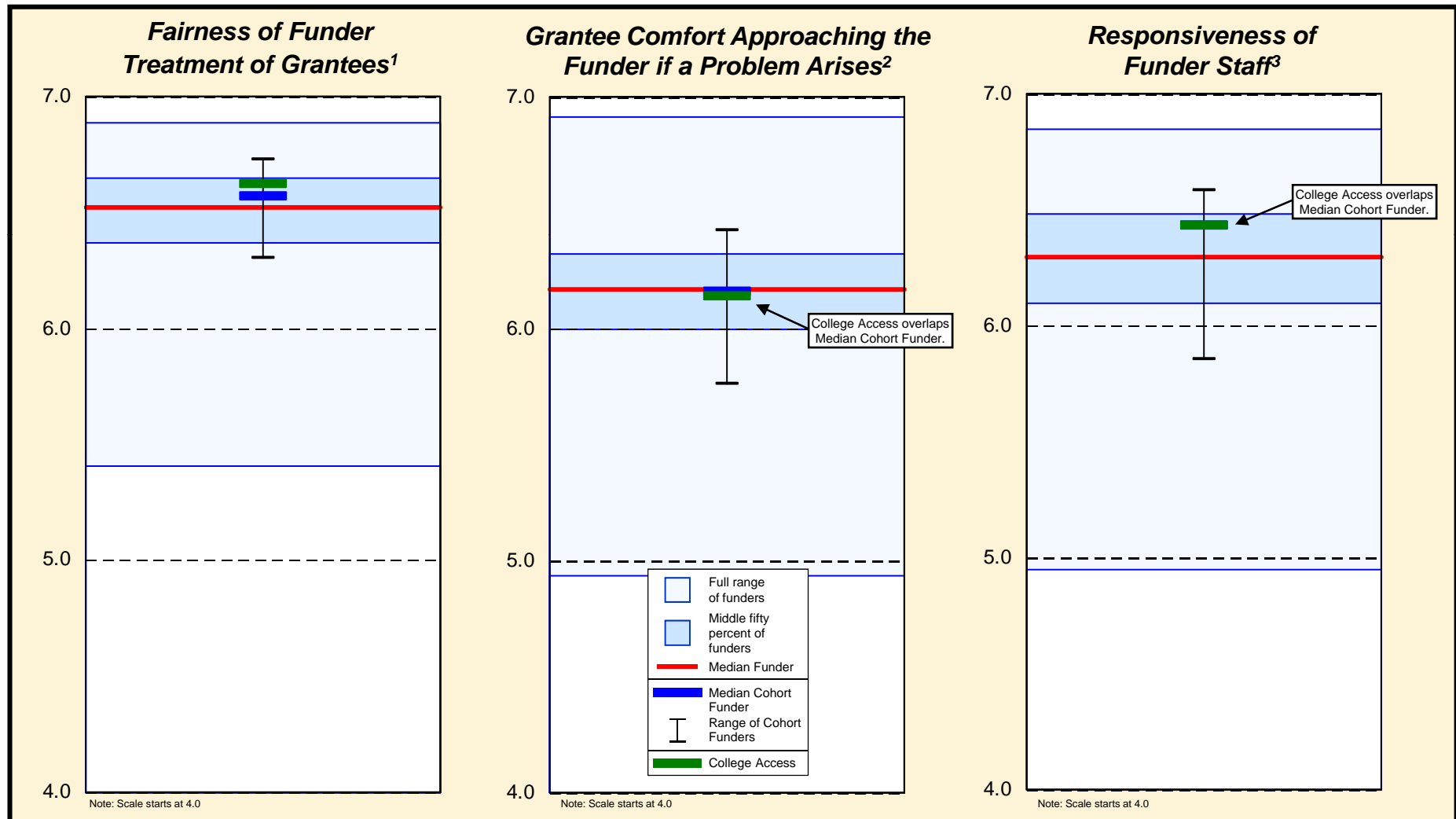
- above 68 percent of funders
- above 57 percent of funders in the cohort

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

- below 54 percent of funders
- below 57 percent of funders in the cohort

On responsiveness of Foundation staff to grantees, College Access is rated:

- above 68 percent of funders
- at the median of 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

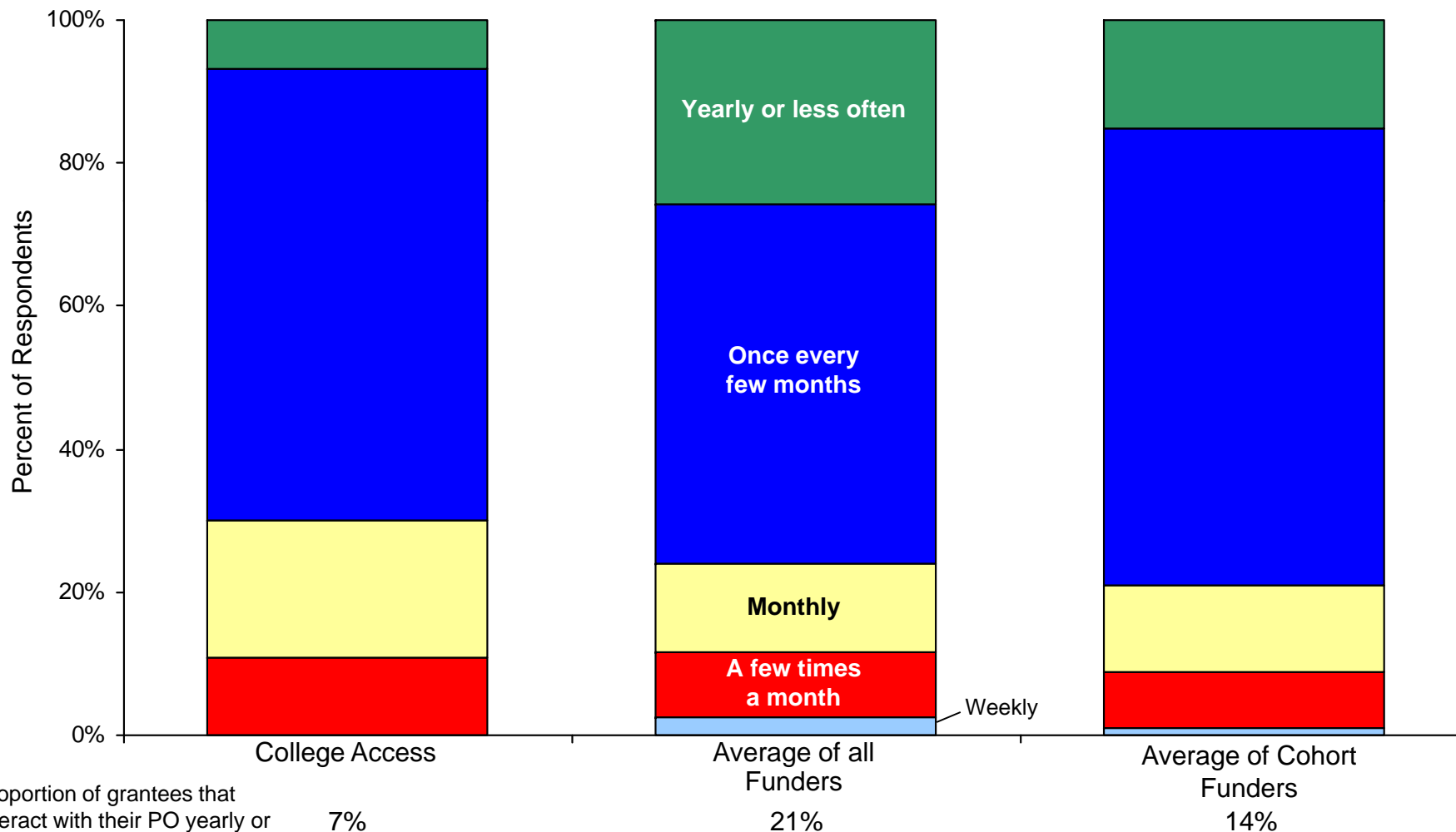
- ◆ *“Foundation's staff was always accessible to help throughout the process. They continue to be supportive and try to find ways to better communicate with grantees and share best practices for the success of programs.”*
- ◆ *“I find working with [our contacts] to be very helpful and constructive. We seem to be all interested in achieving the same important goals of helping needy low-income students receive sufficient funding to graduate from college.”*
- ◆ *“The College Access Foundation has always been extremely professional and a pleasure to work with. Our grant time was during a period where the Foundation changed their reporting requirements significantly. While it took some adjustment to comply with the new guidelines, the Foundation's staff was helpful in walking us through the process step by step.”*
- ◆ *“The Foundation changes its priorities and micro manages. The suggestions made are neither helpful nor productive.”*
- ◆ *“I've always felt at ease about communicating with the Foundation and its staff. I get the answers that help me manage the grant and I feel supported by the Foundation. I particularly enjoy that the Foundation IS interested in our work/challenges that we face. It's important to know that the funders are listening.”*

Frequency of Interactions

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

- smaller than that of 87 percent of funders
- smaller than that of 79 percent of 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 7%

Average of all Funders 21%

Average of Cohort Funders 14%

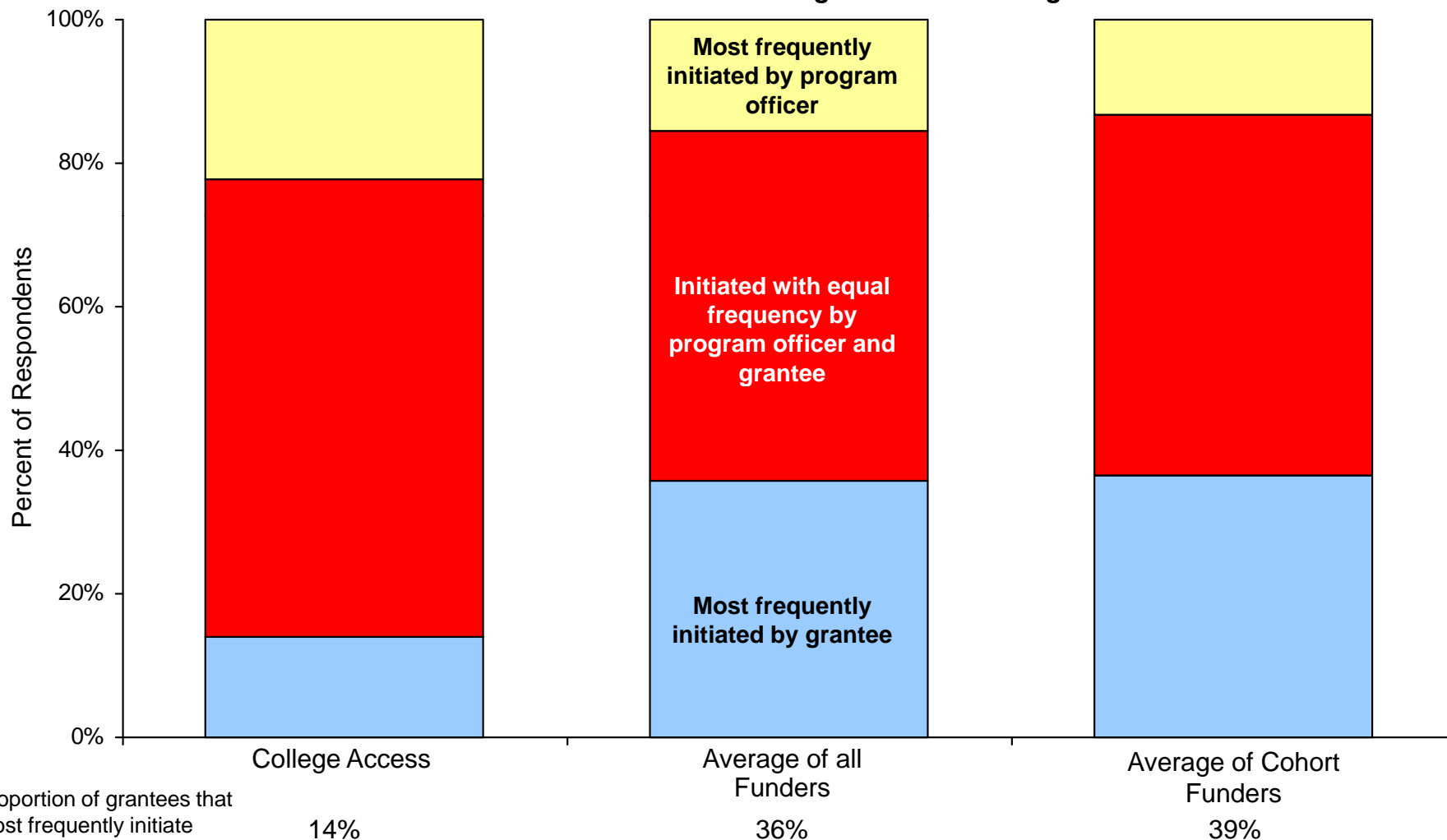
1: The proportion shown for "Average of all funders" and "Average of Comparative Cohort Funders" is a median.

Initiation of Interactions

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

- smaller than that of 94 percent of funders
- smaller than that of all other funders in the cohort

Initiation of Grantee Contact with Program Officer During Grant



Proportion of grantees that most frequently initiate contact¹

14%

36%

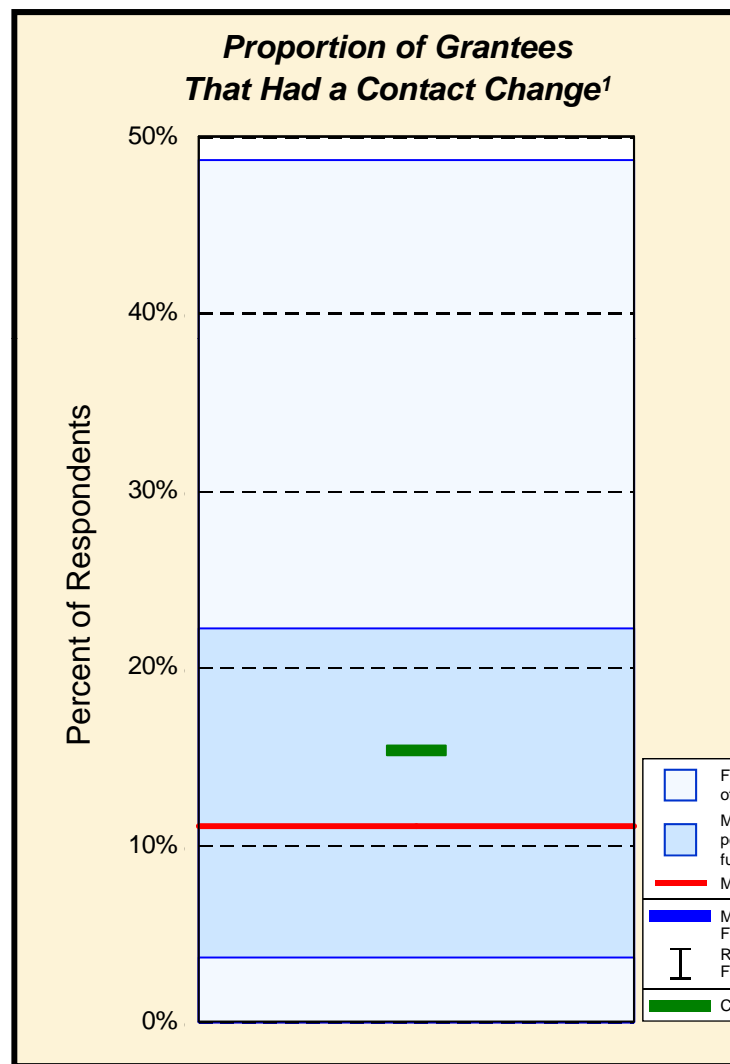
39%

1: The proportion shown for "Average of all funders" and "Average of Comparative Cohort Funders" is a median.

Proportion of Grantees That Had a Change in Primary Contact

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

- larger than that of 61 percent of funders



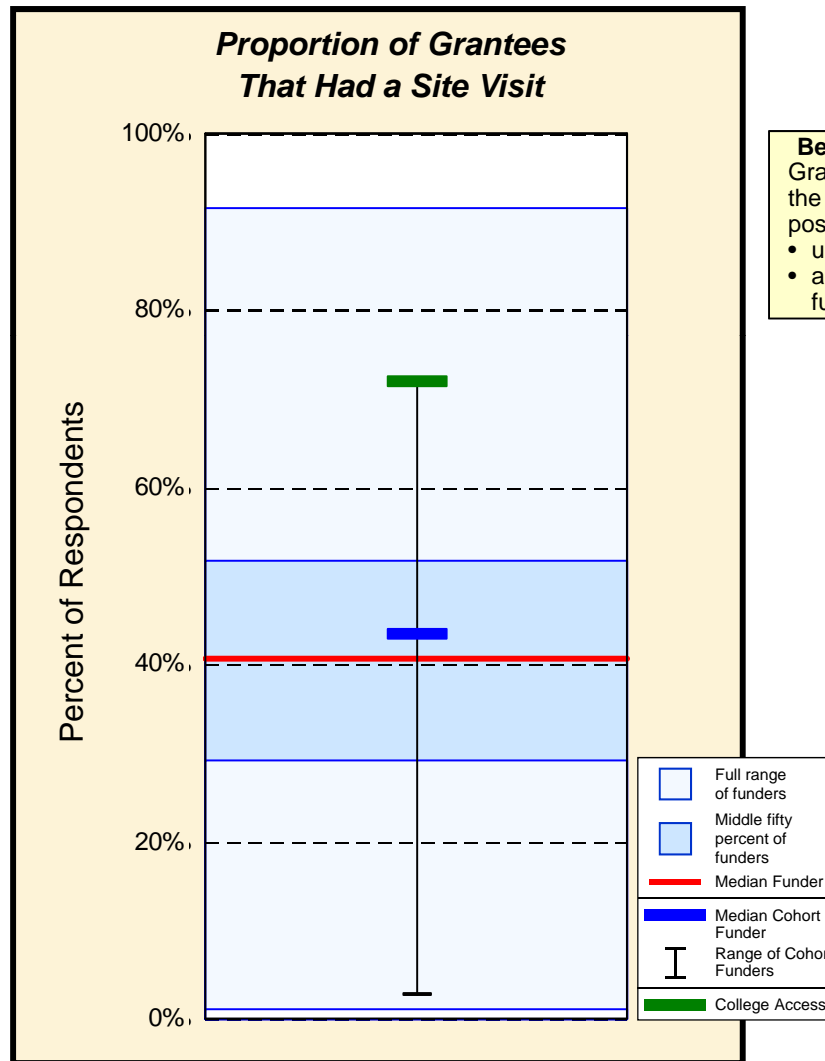
Behind the Numbers – Variation by Reported Primary Contact Changes
 College Access grantees that reported they have experienced a contact change in the last six months indicate they are less comfortable approaching the Foundation should a problem arise and that the Foundation staff were less involved in the development of their grant proposal.

1: Represents data from 75 funders.
 Note: Cohort funder data not available due to changes to the survey instrument.

Proportion of Grantees That Had a Site Visit

The proportion of College Access grantees receiving a site visit is:

- larger than that of 92 percent of funders
- larger than that of all other funders in the cohort



Behind the Numbers – Variation by Site Visit
 Grantees that report receiving a site visit during the course of the grant rate the Foundation more positively for its:

- understanding of their organization
- ability to improve the sustainability of the funded work.

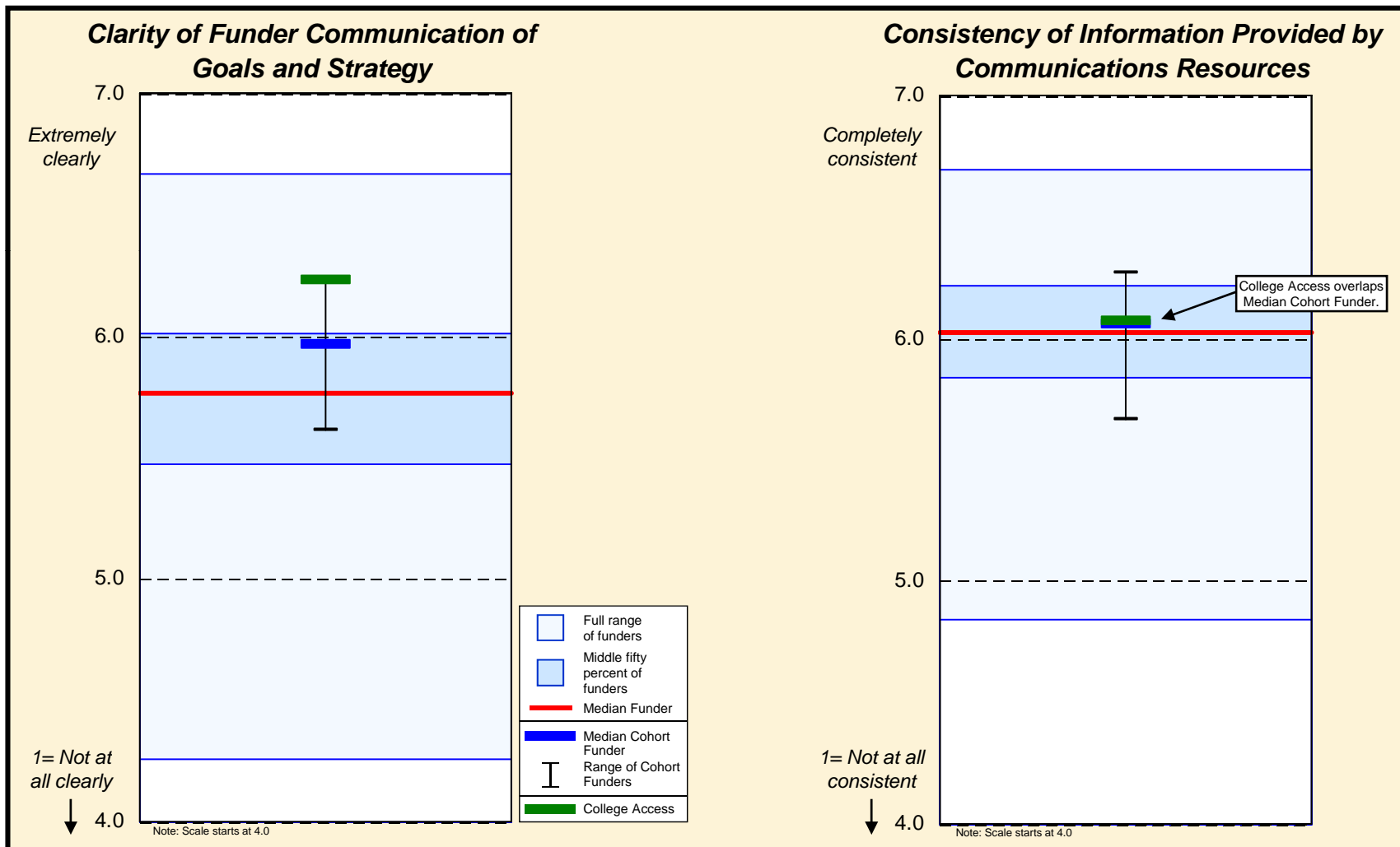
Communications Measures

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

- above 94 percent of funders
- higher than all other funders in the cohort

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

- above 56 percent of funders
- above 64 percent of funders in the cohort

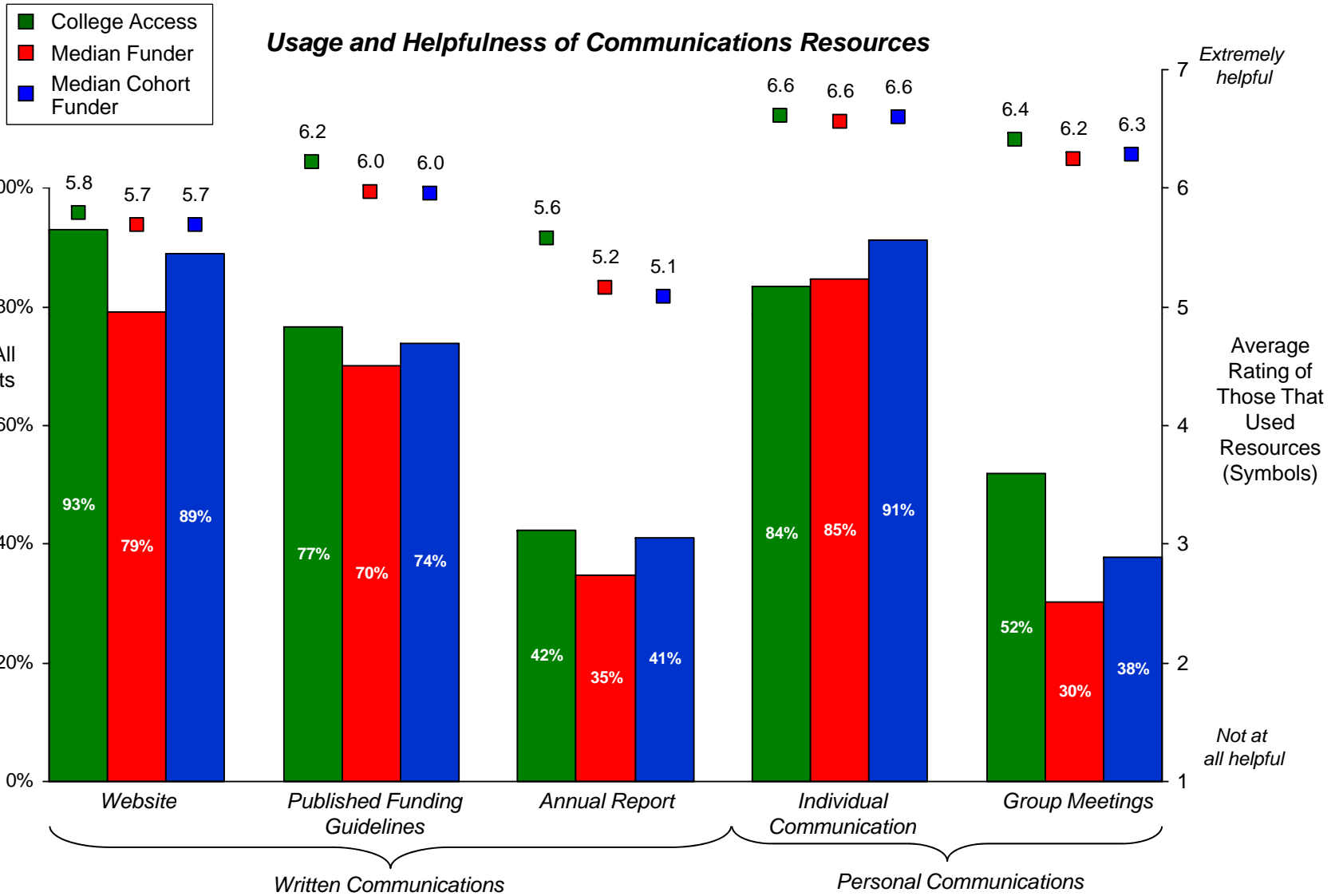


Note: In the left-hand chart, data is not shown from one funder whose clarity of communication rating is less than 4.0. In the right-hand chart, this question includes a "used one or no resources" response option; 0 percent of College Access respondents indicated they had used one or no resources, compared to 5 percent at the median funder, and 4 percent of respondents at the median cohort funder.

Selected Grantee Comments

- ◆ *“The College Access Foundation has very user-friendly forms and an easily navigated, comprehensive website. We have also benefited from the high level of communication and service from our Program Officer.”*
- ◆ *“Overall the information we receive from the Program Officer is clear and direct. However, there typically tends to be a very tight turnaround time for us to deliver on requests.”*
- ◆ *“I feel that my in person communication with the Foundation is usually quite useful. I have not always found the email contact as helpful or clear. I generally have to follow up email communications with a phone call to gain clarity.”*
- ◆ *“Foundation staff are extremely good at articulating a consistent message about their goals and priorities and cultivating relationships, between grantees and staff, and just between grantees, that encourage open and helpful conversations about project goals.”*

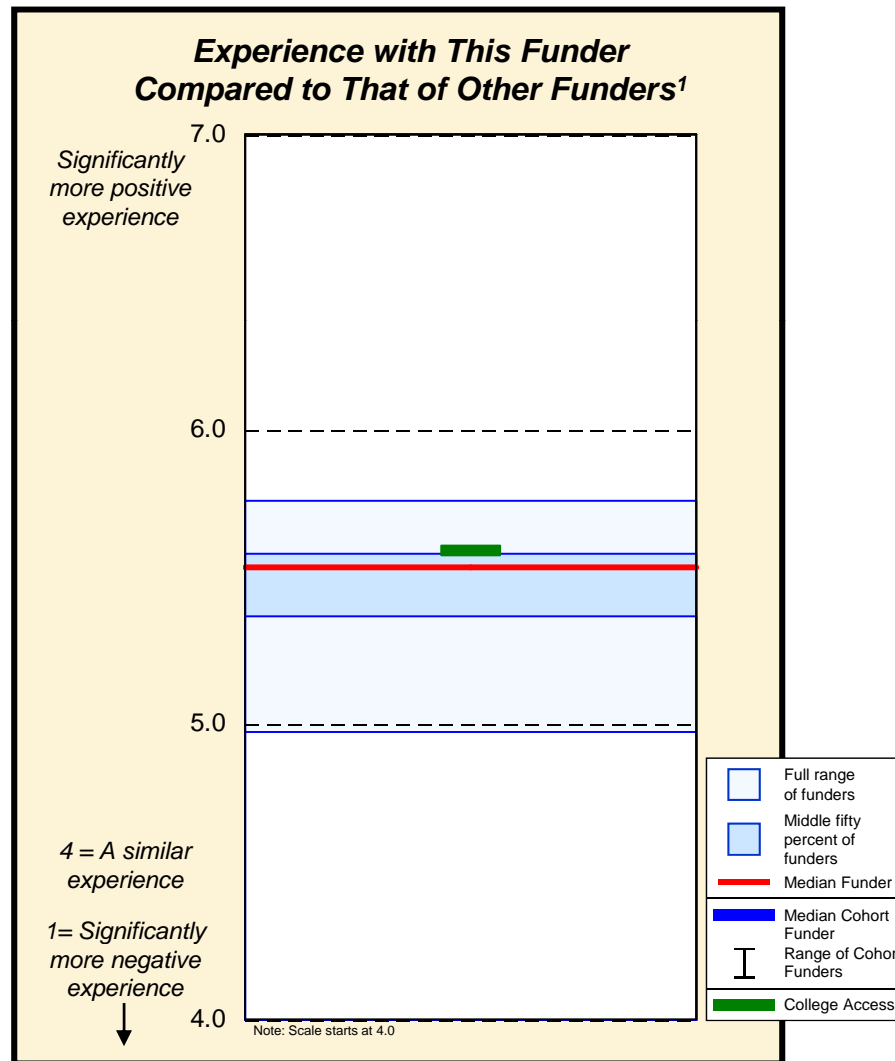
Communications Resources



Experience with Other Funders

On how grantees' recent experience with the Foundation compares with that of other funders, College Access is rated:

- above 80 percent of the 11 funders in CEP's comparative dataset



1: Represents data from 11 funders.

Note: This question includes a "N/A – I have never received a grant from another funder" response option; 4 percent of College Access respondents indicated they have never received a grant from another funder, compared to 4 percent at the median funder. Cohort funder data not available due to changes in the survey instrument

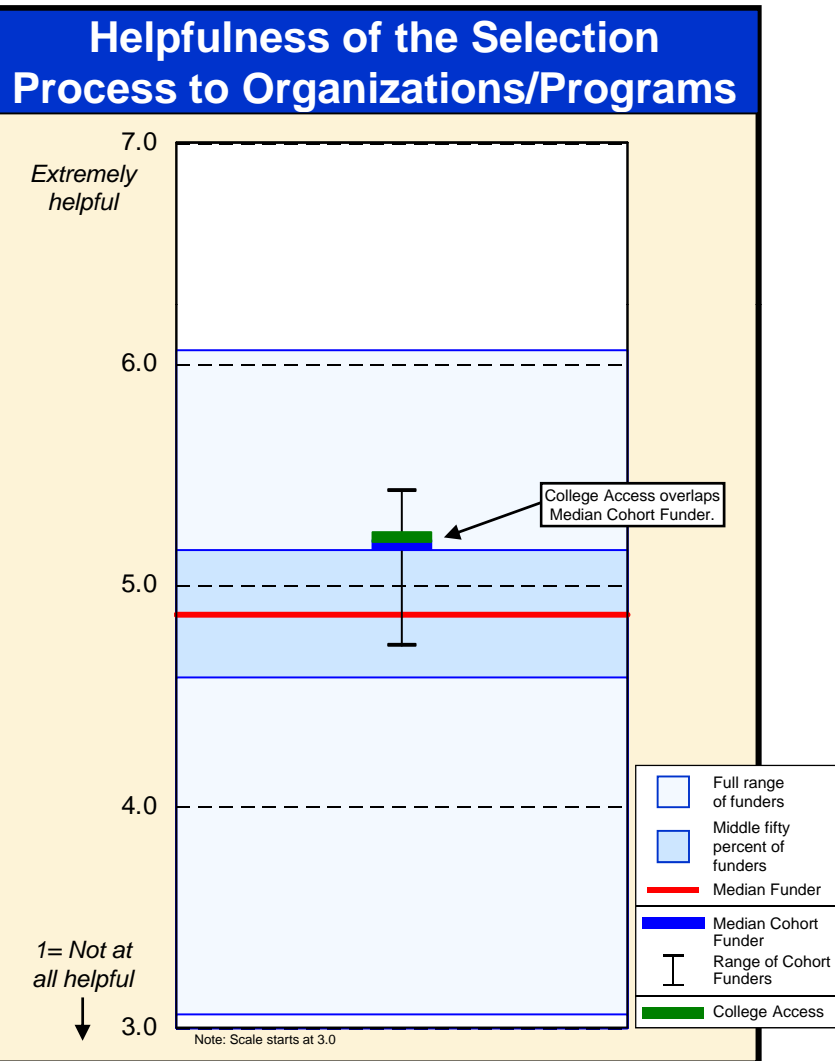
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Helpfulness of Selection Process

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

- above 82 percent of funders
- above 69 percent of funders in the cohort



Selected Grantee Comments

- ♦ *“Working with the Foundation has been a very positive process. I've felt encouraged and supported along the way and received good direction and feedback on how to make our request successful.”*
- ♦ *“Although most of our dealings with the Foundation are positive, the most difficult part is answering the 'clarification questions' after the proposal is submitted. These questions have not always been related to the information requested in the proposal, and we are given very little time to respond to them. Why not request the information in the original proposal?”*
- ♦ *“The Foundation's guidelines and process are laid out clearly. Their process to accept applications is awkward - since there tends to be several months lag before the grant is reviewed which requires our organization to have to provide 'updated' information outside of our regular reporting and application cycle. The timing of the application, review, reports, and decision could potentially be improved.”*

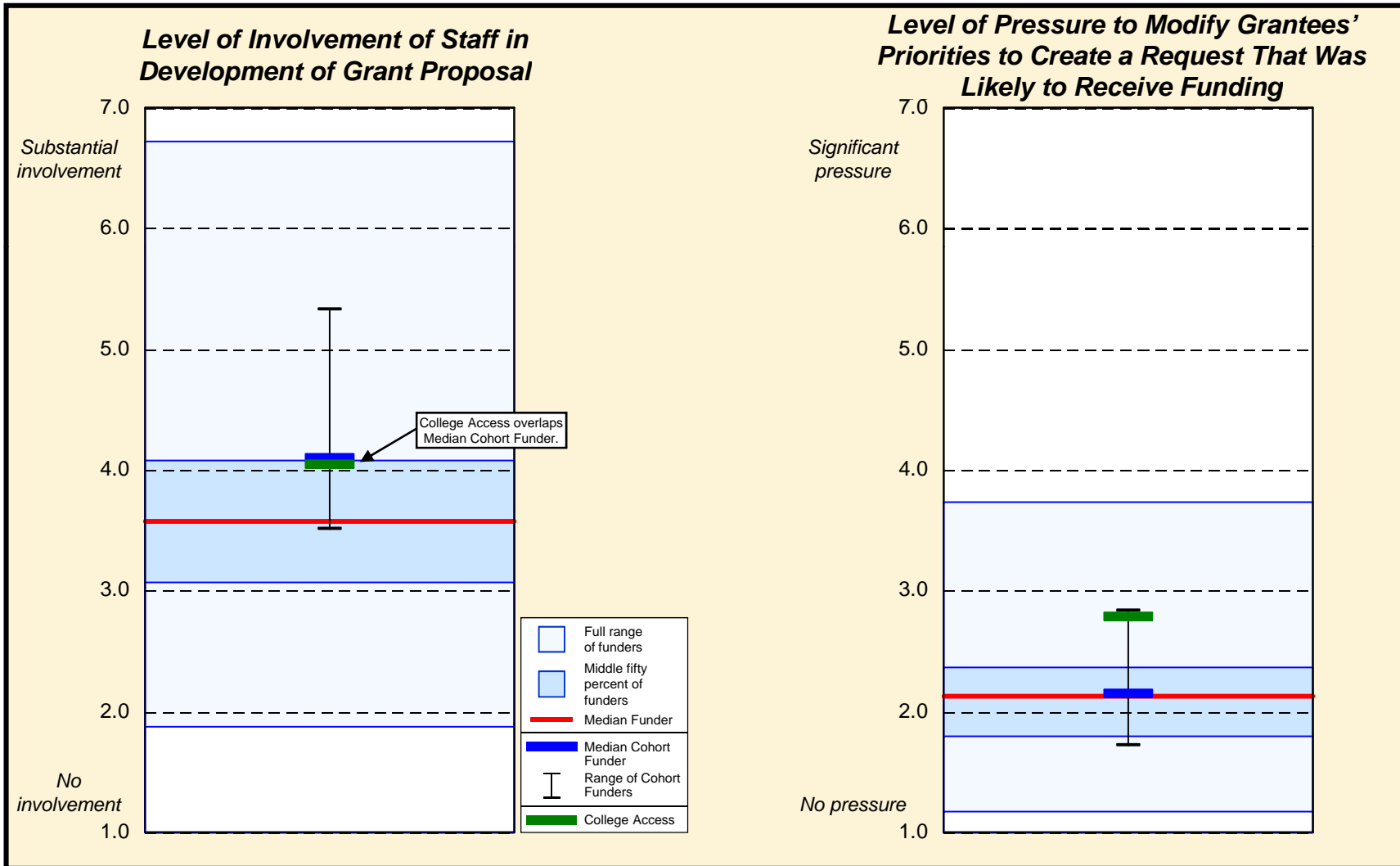
Funder Involvement and Pressure in Selection Process

On the level of involvement in the development of grantees' proposals, College Access is rated:

- above 72 percent of funders
- below 69 percent of funders in the cohort

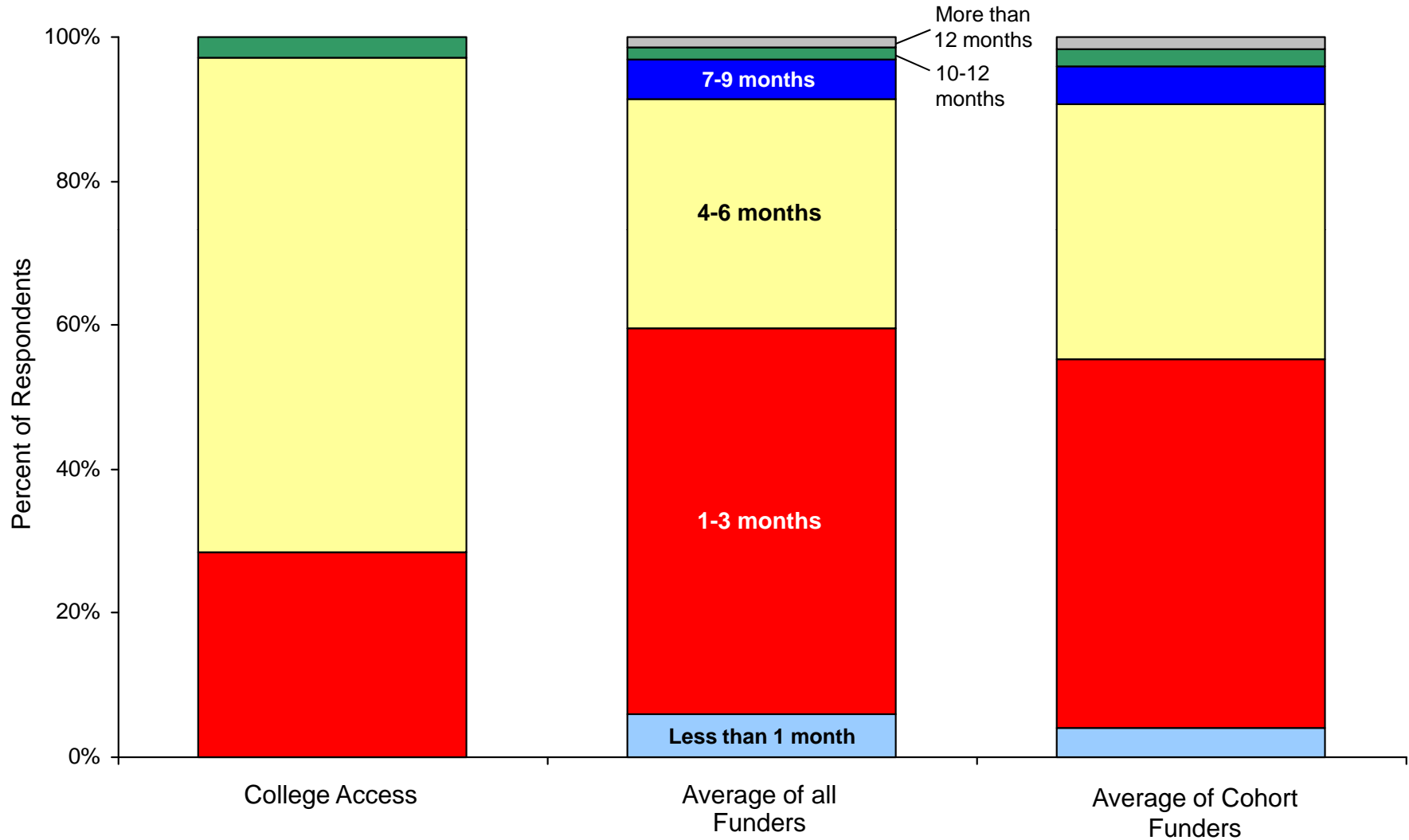
On the level of pressure grantees feel to modify their priorities to create a proposal that was likely to receive funding, College Access is rated:

- above 94 percent of funders
- above 82 percent of funders in the cohort



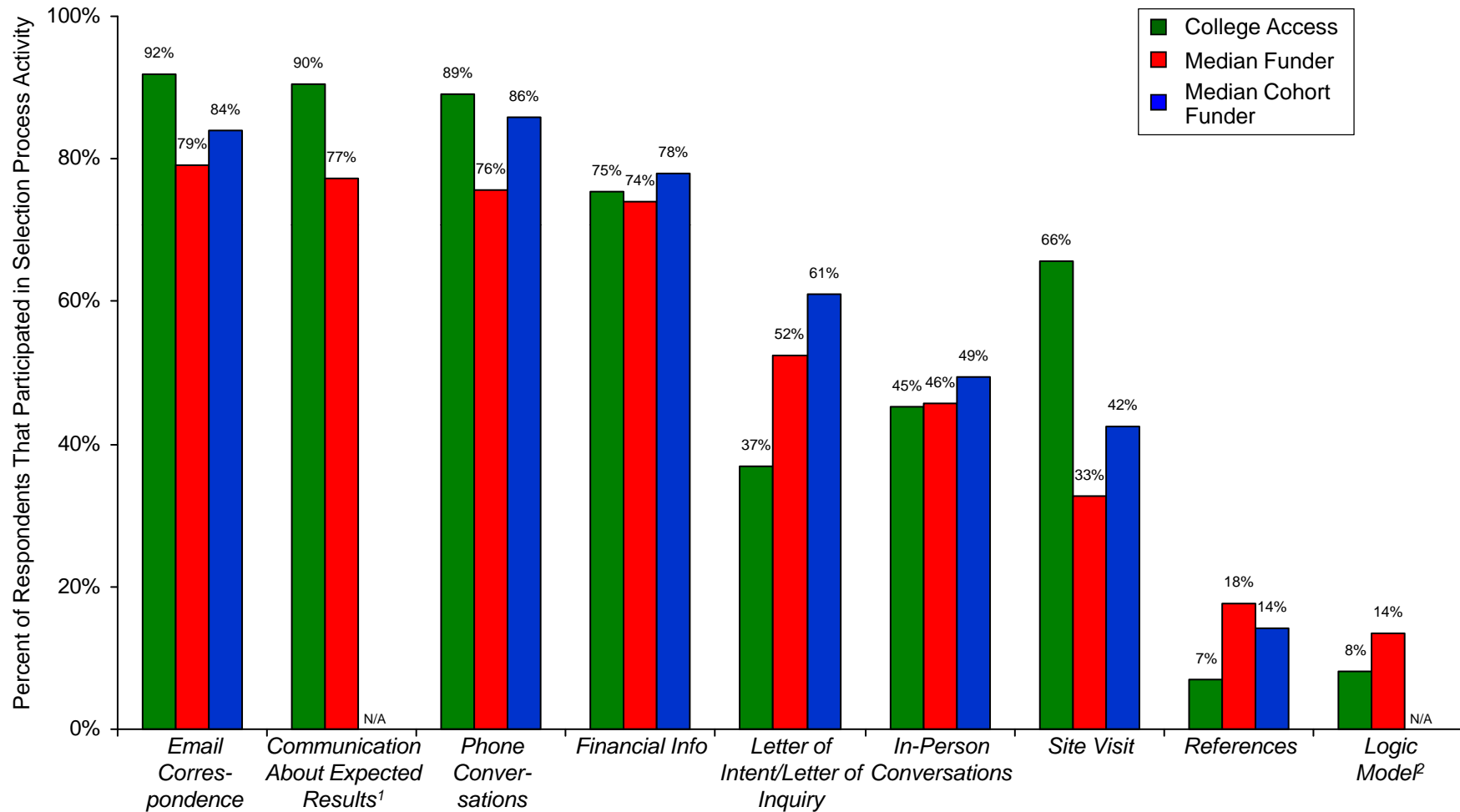
Time Between Submission and Clear Commitment

Time Elapsed Between Proposal Submission and Clear Commitment



Selection Process Activities

Selection Process Activities



1: Represents data from 69 funders.

2: Represents data from 55 funders.

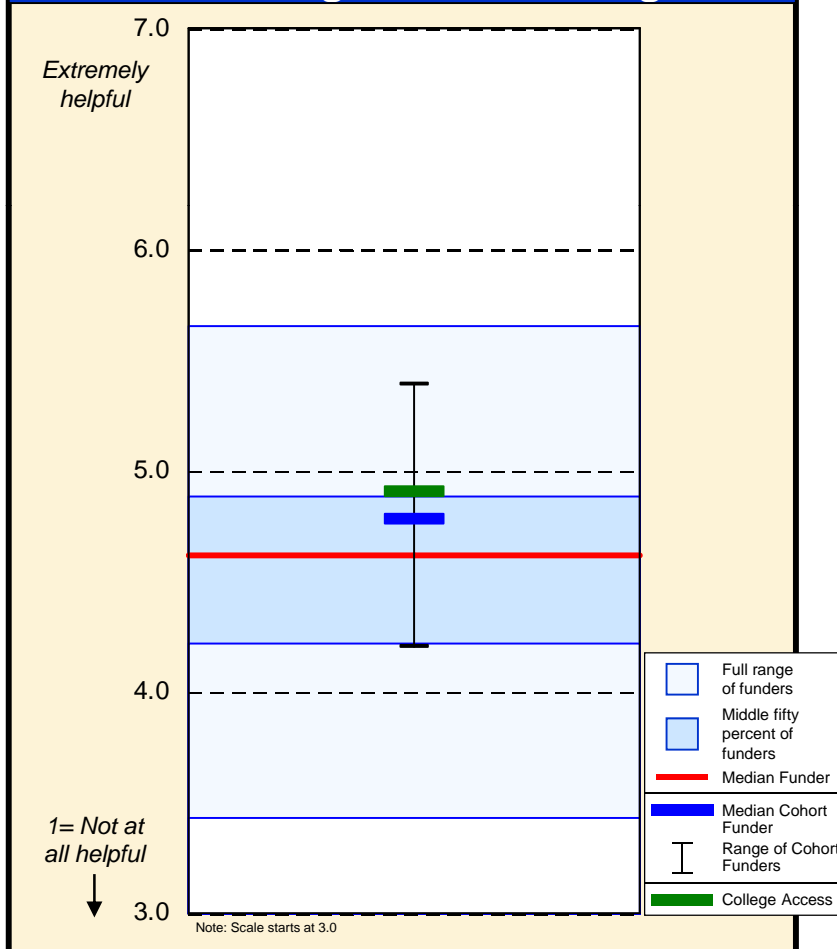
Note: Cohort funder data not available due to changes to the survey instrument.

Helpfulness of Reporting and Evaluation Processes

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

- above 76 percent of funders
- above 82 percent of funders in the cohort

Helpfulness of Reporting/Evaluation Process to Organizations/Programs



Selected Grantee Comments

- ♦ "...They are placing many expectations on us for administering a scholarship program and reporting on it without providing any tools or staff funding to develop such a program. So we have had to totally re-structure our scholarship program ourselves (with no best practices with others or tools/resources from CAFC) with the same staff who are the student advisors."
- ♦ "The scholarship work required by this grant has generated a focus for our organization which, I believe has enhanced our delivery of services in our partner schools."
- ♦ "The Foundation has been particularly interested in data collection which has impacted how we now collect our data as well. We have integrated the data measures across the board in our program... This has been a valuable benefit although it has also been a challenge to execute since we had to initiate new processes and develop new data collection practices and systems which were investments in time and monetary resources....these data enhancements required additional funding which was not included in our original grant request."

Note: In spring of 2011, CEP asked grantees to indicate if the reporting/evaluation process involved or did not involve an external evaluator. For College Access, 54 percent of grantees indicated that they had participated in a reporting/evaluation process that did not involve an external evaluator and 6 percent participated in a reporting/evaluation process that involved an external evaluator. For the 11 funders for which data is available, 38 percent at the median funder participated in a reporting/evaluation process that did not involve an external evaluator and 7 percent involved an external evaluator.

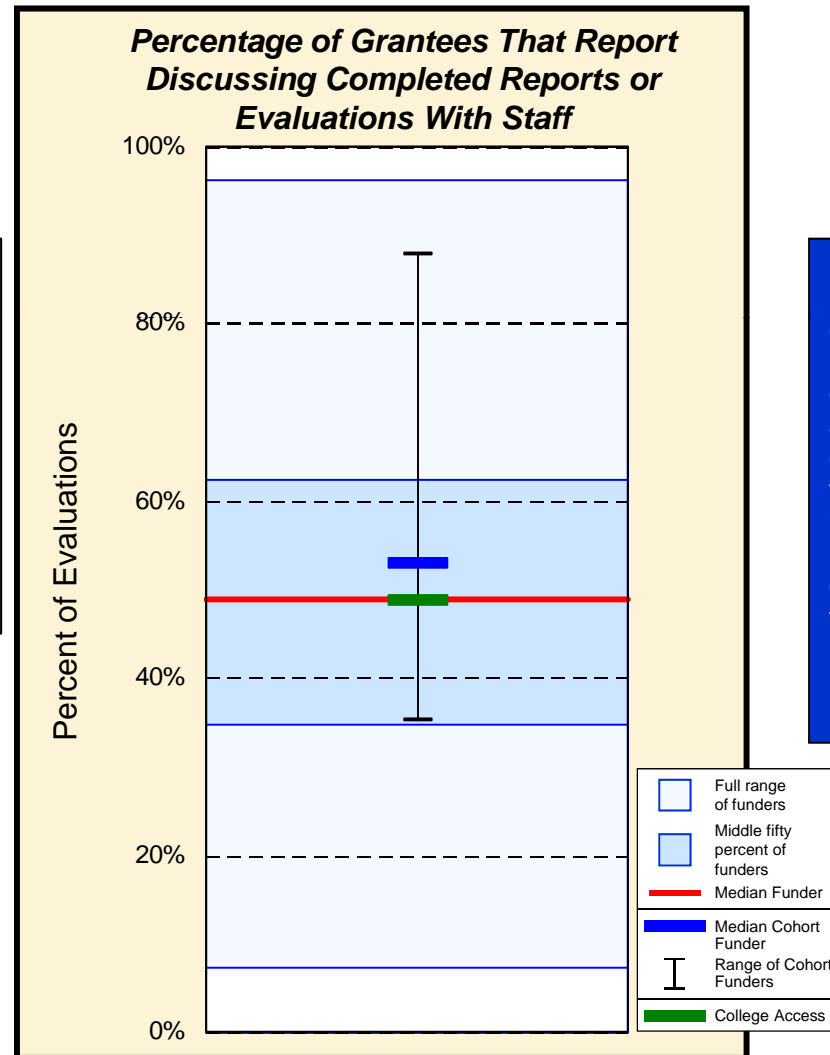
Note: This question was only asked of those grantees that had participated in a reporting or evaluation process by the time they took the survey.

For College Access, 60 percent of grantees indicated that they had participated in a reporting or evaluation process by the time they took the survey, compared to 61 percent at the median funder, and 64 percent of respondents at the median cohort funder.

Reporting and Evaluation Processes

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

- smaller than that of 51 percent of funders
- smaller than that of 64 percent of funders in the cohort



Behind the Numbers – Variation by Discussion of Completed Reports and Evaluations

Grantees that report discussing their evaluation with Foundation staff rate the Foundation more positively across many measures including:

- Impact on grantees’ local communities
- Impact on grantees’ fields
- Improving the sustainability of the funded work
- Helpfulness of the selection process
- Helpfulness of the evaluation process
- Effect on grantees’ ability to meaningfully assess the results of the funded work

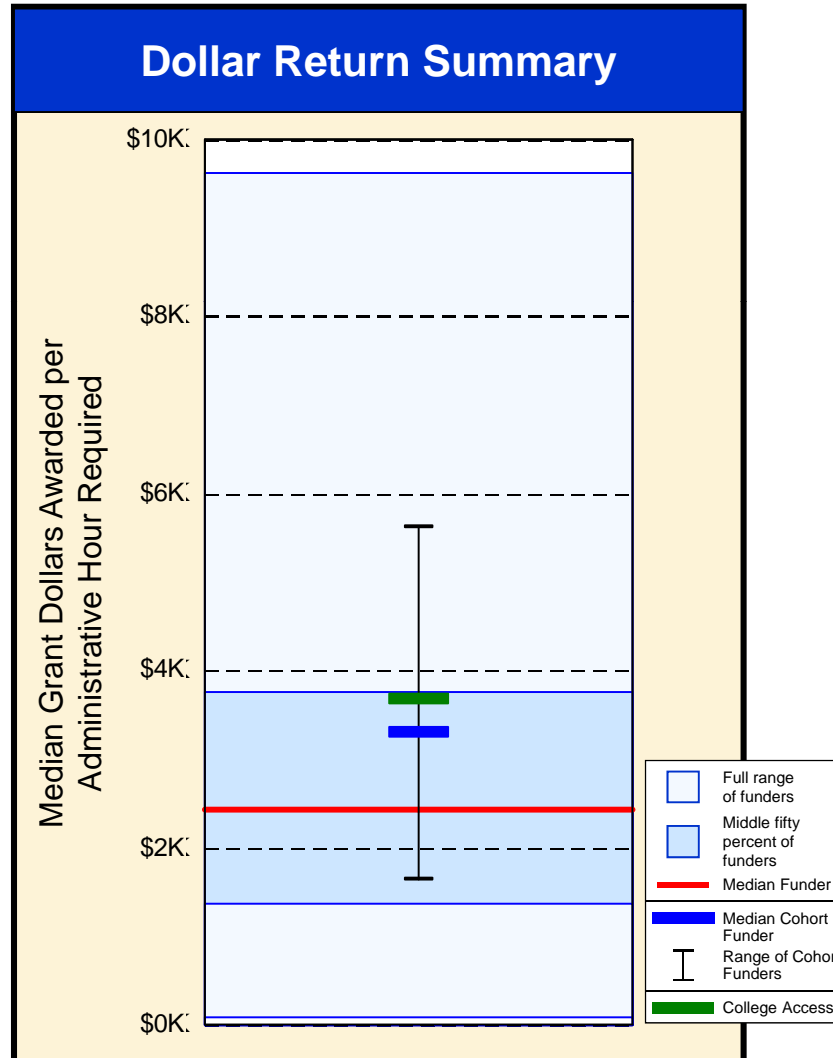
Survey-Wide Analysis Fact: The helpfulness of the reporting or evaluation process is the lowest rated measure by grantees in CEP’s dataset. However, grantees who have a discussion about their reports or evaluations with the foundation tend to find the reporting or evaluation process to be significantly 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 College Access, 60 percent of grantees indicated that they had participated in a reporting or evaluation process by the time they took the survey, compared to 61 percent at the median funder, and 64 percent of respondents at the median cohort funder.

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 College Access grantees is:

- greater than that of 74 percent of funders
- greater than that of 62 percent of 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 eight funders whose Dollar Return on Grantee Administrative Hours exceeds \$10K.

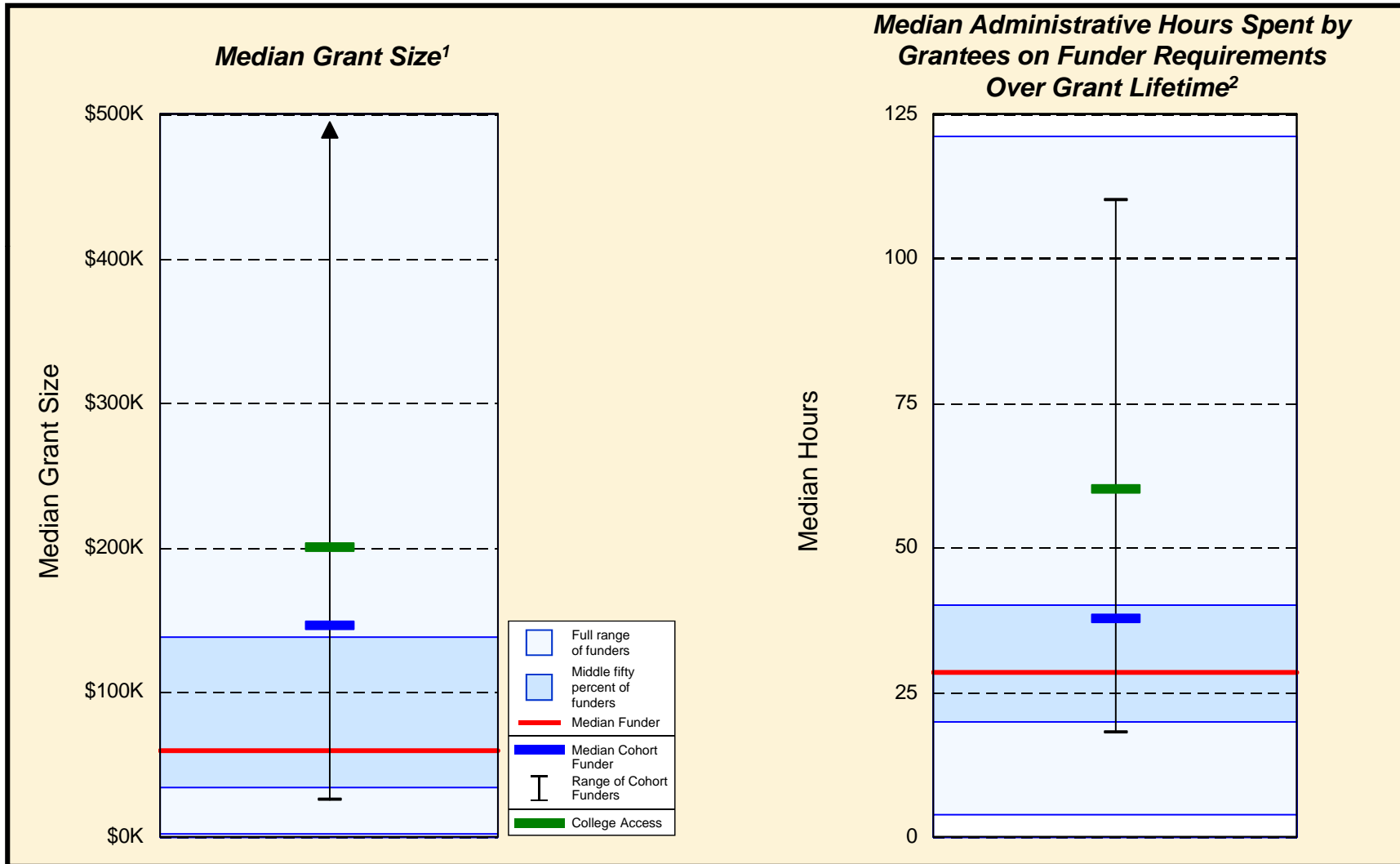
Grant Size and Administrative Time

At the median, the grant size reported by College Access grantees is:

- larger than that of 83 percent of funders
- larger than that of 64 percent of funders in the cohort

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

- greater than the time spent by grantees of 87 percent of funders
- greater than the time spent by grantees of 92 percent of funders in the cohort



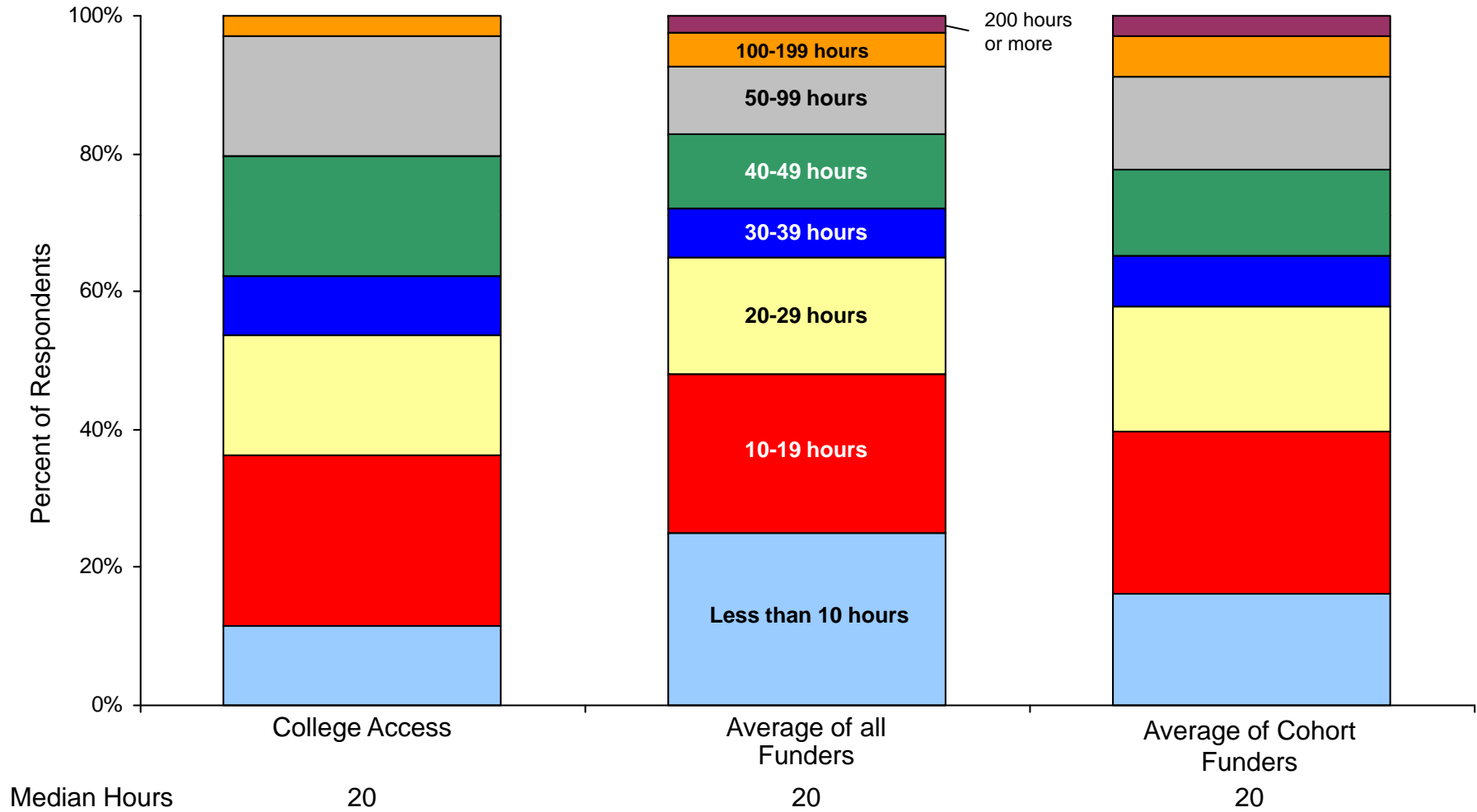
1: Chart does not show data from 12 funders whose median grant size exceeds \$500K.
 2: Chart displays total grant proposal creation, evaluation, and monitoring hours spent over the life of the grant; each of these events did not necessarily occur for each individual grantee. Chart does not show data from two 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 College Access grantees during the selection process is:

- less than the time spent by grantees of 51 percent of funders

Median Administrative Hours Spent by Grantees on Proposal and Selection Process

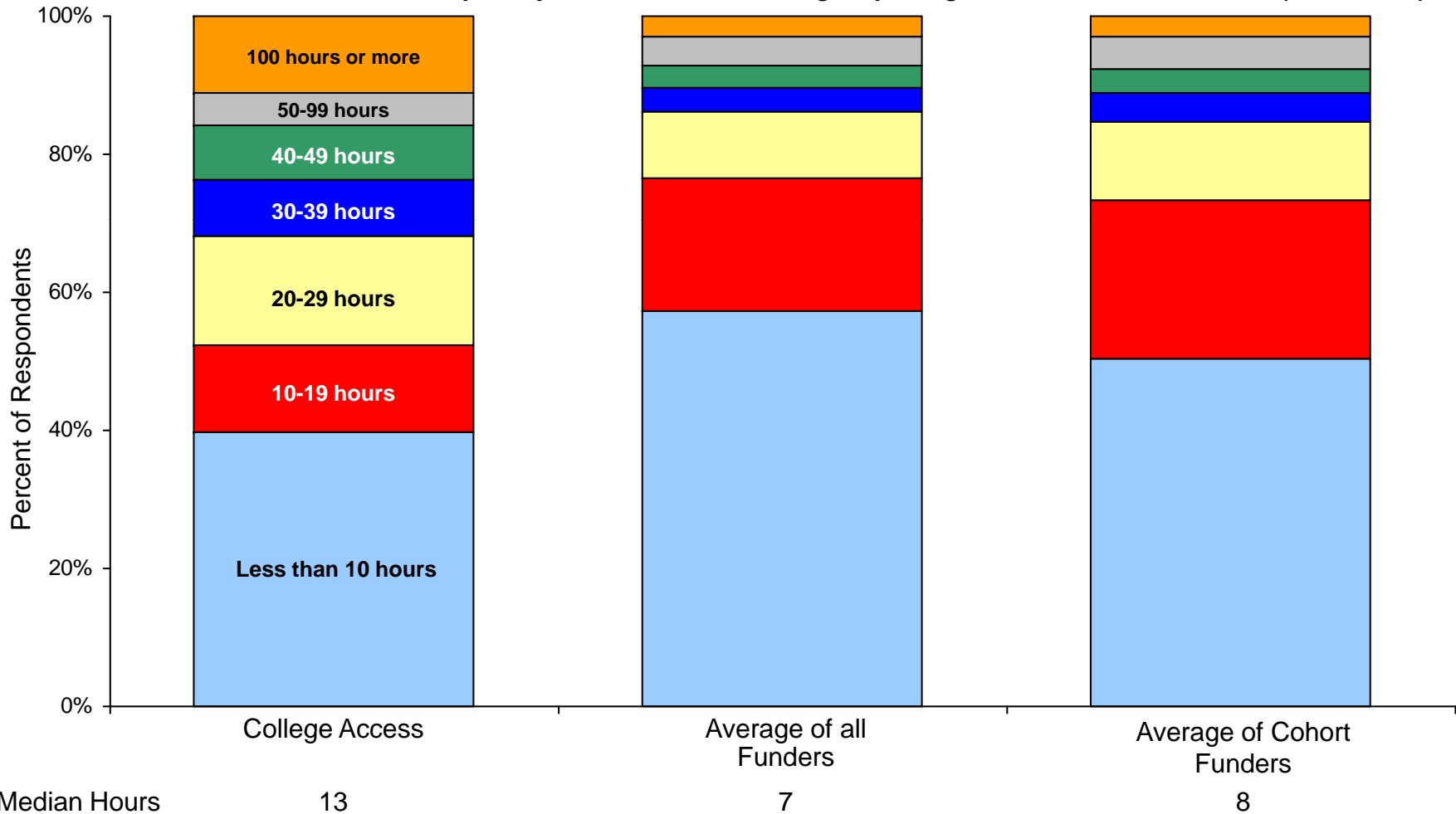


Administrative Time – Reporting and Evaluation Processes

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

- greater than the time spent by grantees of 86 percent of funders
- greater than the time spent by grantees of 77 percent of funders in the cohort

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



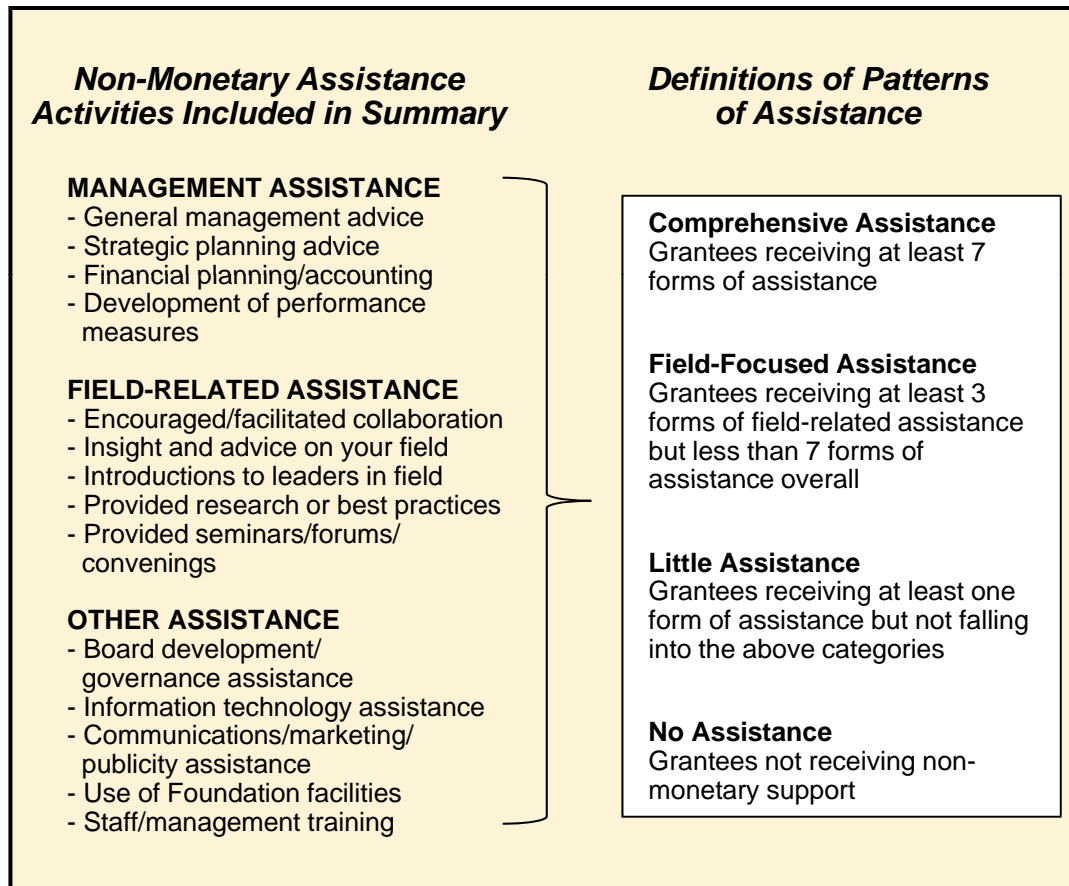
Note: "Evaluation" in the survey includes any activity considered by grantees to be part of an evaluation, and does not necessarily correspond to the Foundation's definition.

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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.



Selected Grantee Comments

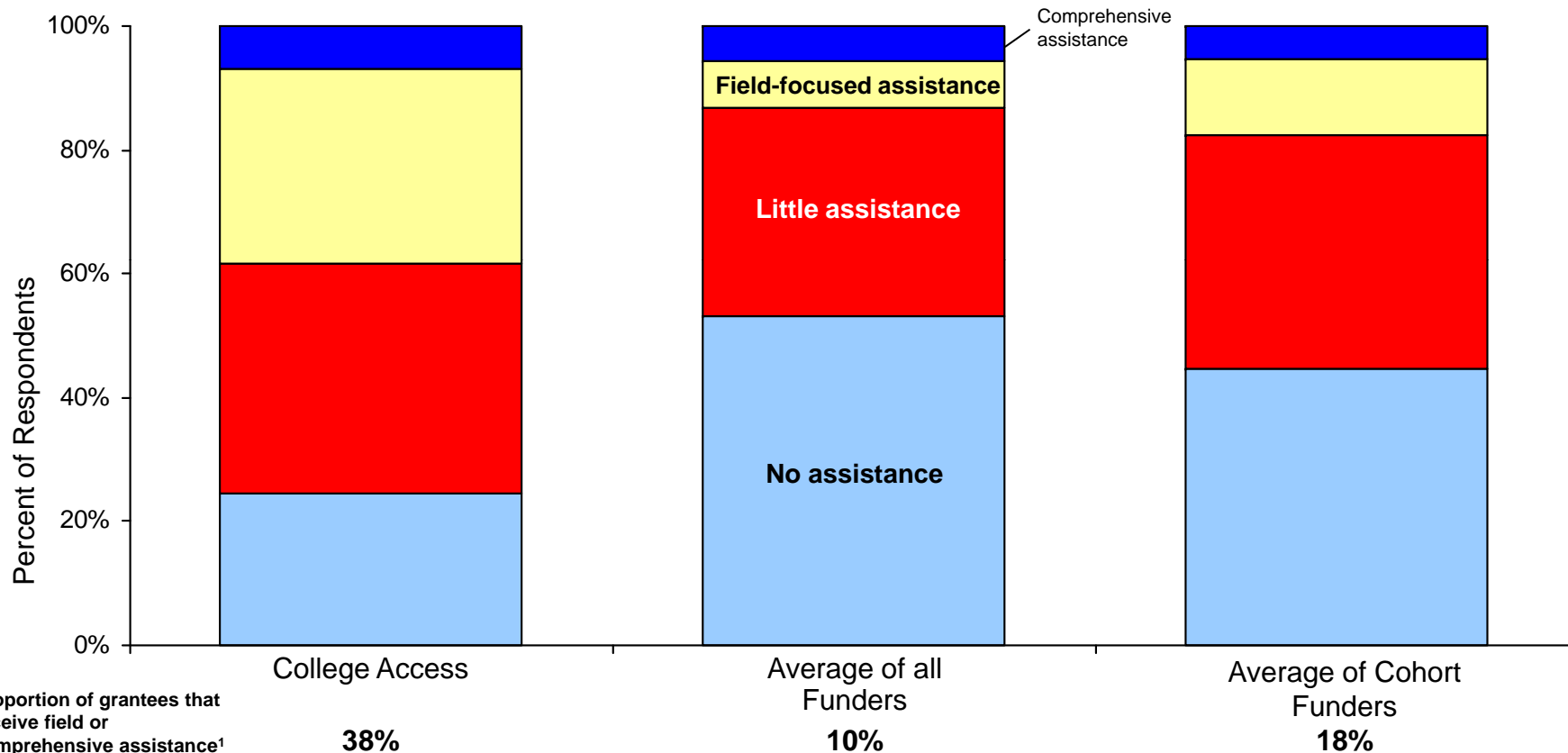
- ♦ *“They host an annual grantee meeting that includes professional development sessions, networking, and best practice forums. These meetings have been the most influential in gathering knowledge about our college access program.”*
- ♦ *“The yearly conferences are great for networking, learning about best practices and better understanding the focus of the foundation.”*
- ♦ *“CAFC could make more impact among grantees if they had us share scholarship providing/program best practices. Many of us are re-inventing the wheel, and we could really use more collaboration there so that we can be more efficient in administering our programs.”*

Non-Monetary Assistance Summary (2)

The proportion of College Access grantees that report receiving comprehensive or field-focused assistance is:

- larger than that of 96 percent of funders
- larger than that of all other funders in the cohort

Non-Monetary Assistance Patterns



Grantees that report receiving field or comprehensive assistance from the Foundation, compared to those who report receiving little or no assistance rate College Access more positively for its understanding of the field, relationship with grantees, and how it compares to other philanthropic funders.

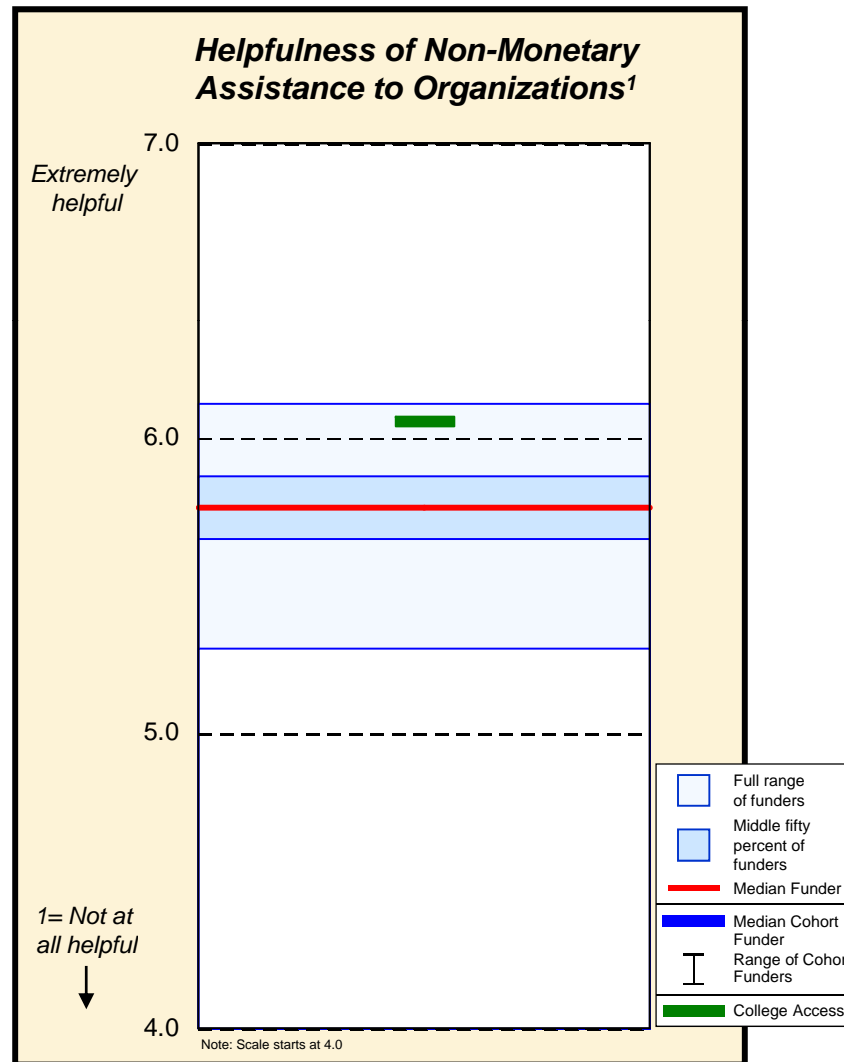
Survey-Wide Analysis Fact: Providing just two or three types of assistance appears to be ineffective; it is only when grantees receive either a comprehensive set of assistance activities or a set of mainly field-focused types of assistance that they have a substantially more positive and productive experience 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 Comparative Cohort 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, College Access is rated:

- above 90 percent of the 11 funders in CEP's comparative dataset



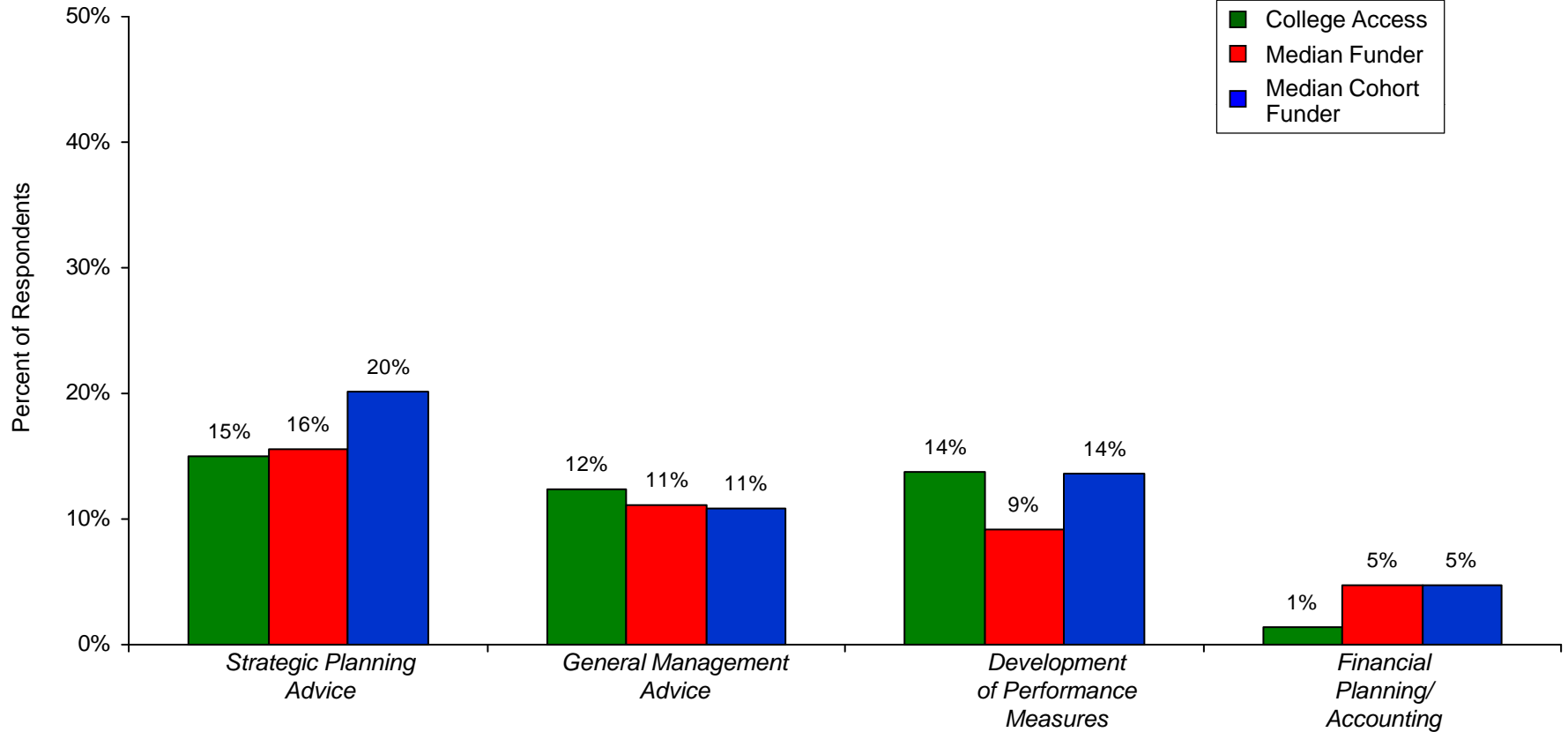
1: Represents data from 11 funders.

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. Cohort funder data not available due to changes to the survey instrument.

Management Assistance Activities

Frequency of Management Assistance Activities

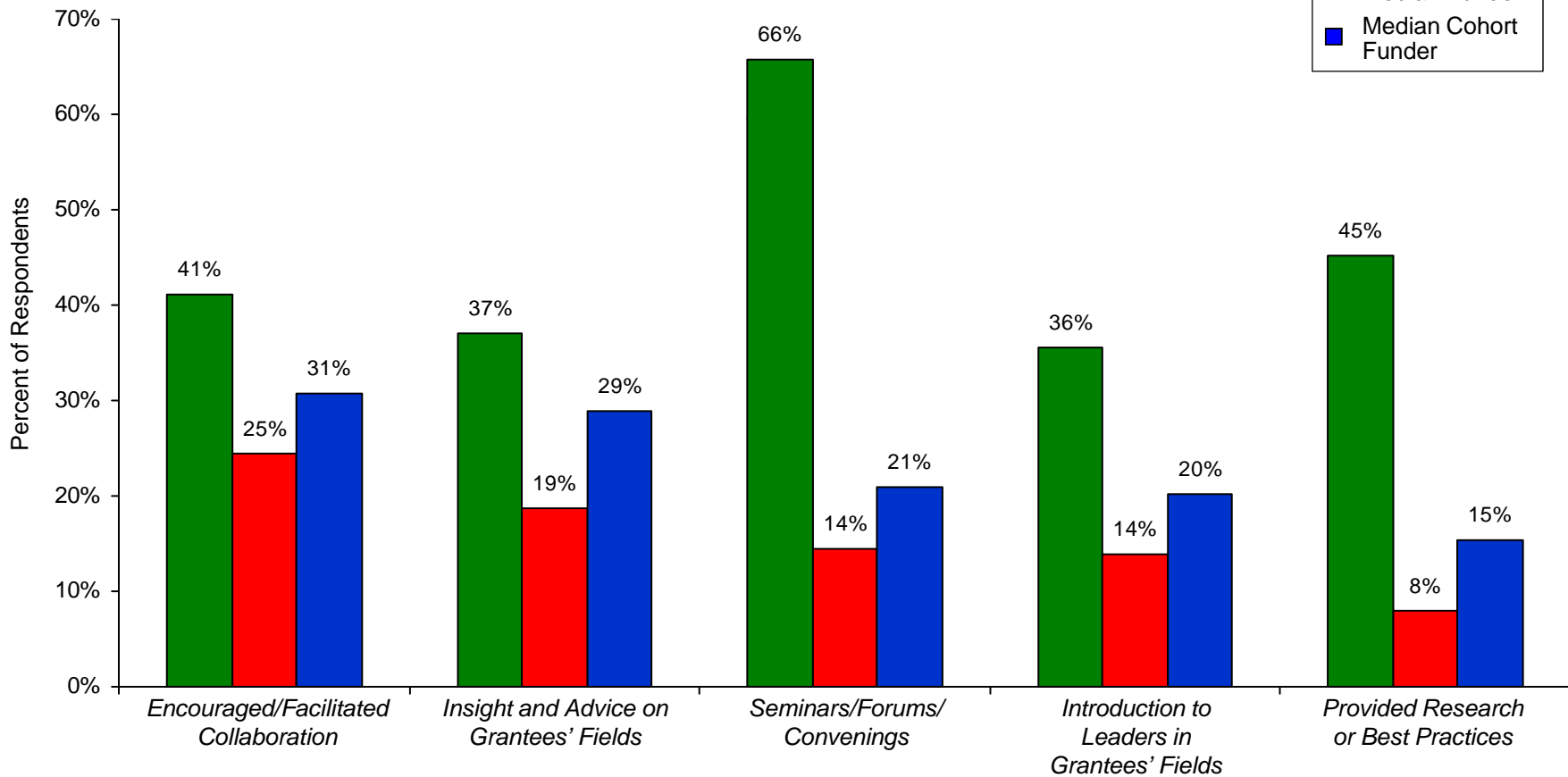
Scale ends at 50%



Field-Related Assistance Activities

Frequency of Field-Related Assistance Activities

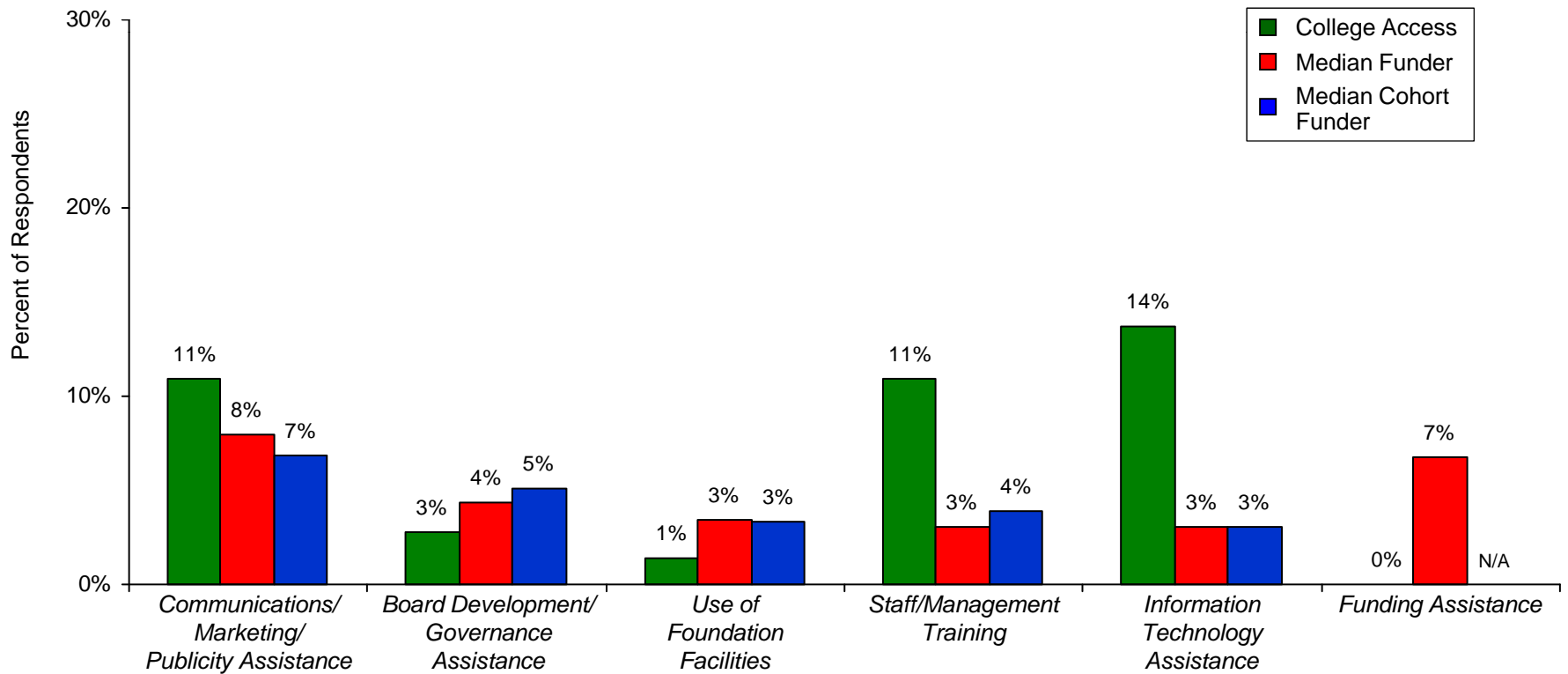
Scale ends at 70%



Other Support Activities

Frequency of Other Assistance Activities

Scale ends at 30%

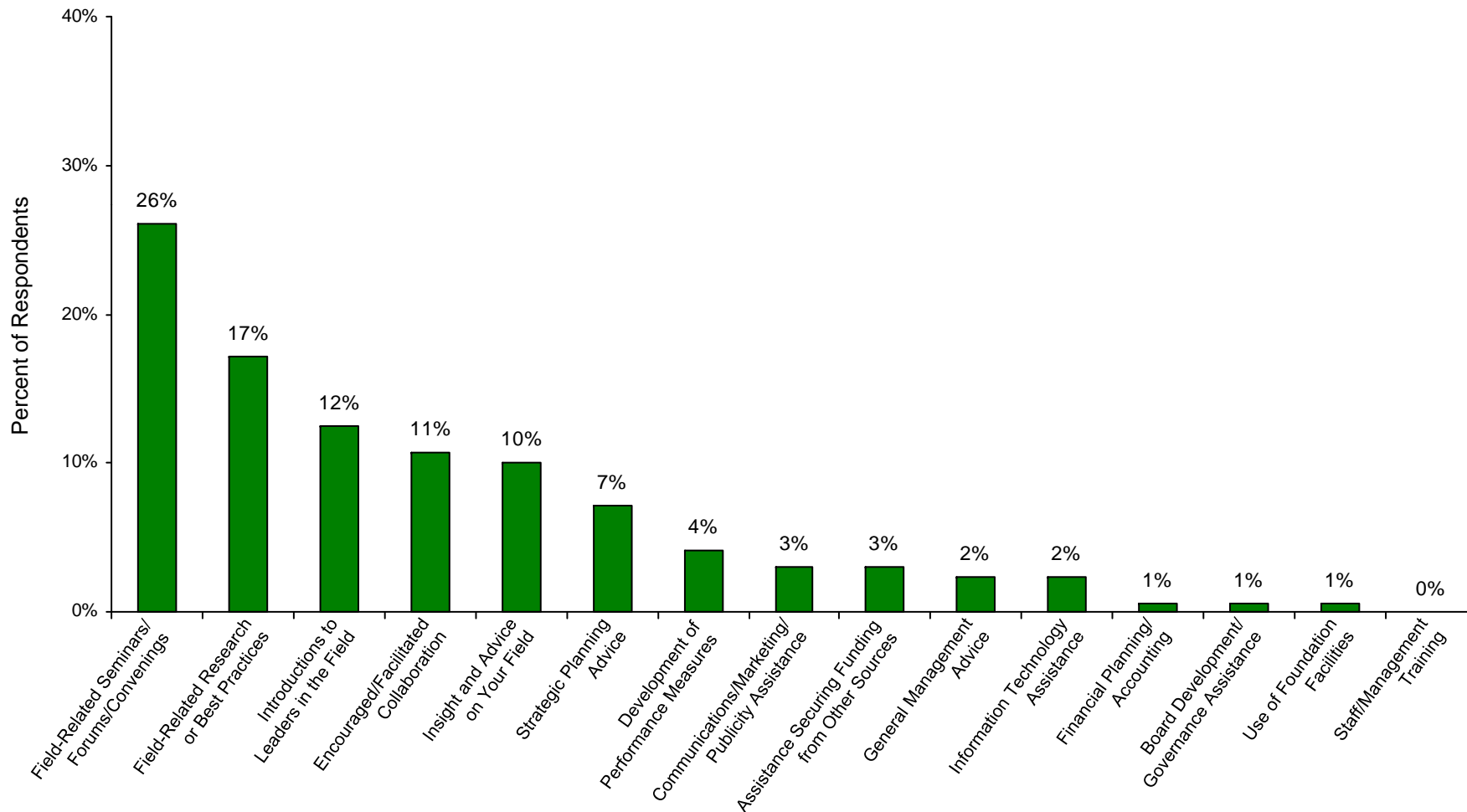


Note: Cohort funder data not available due to changes to the survey instrument.

Most Valuable Non-Monetary Assistance

Grantees were asked to select up to three types of non-monetary assistance activities provided by the Foundation that were most valuable to them. The activities most frequently selected as most valuable were field-related seminars/forums/convenings and field-related research or best practices.

Scale ends
at 40%



Note: Comparative data not available because this question was only asked of College Access grantees. Grantees made a total of 169 selections.

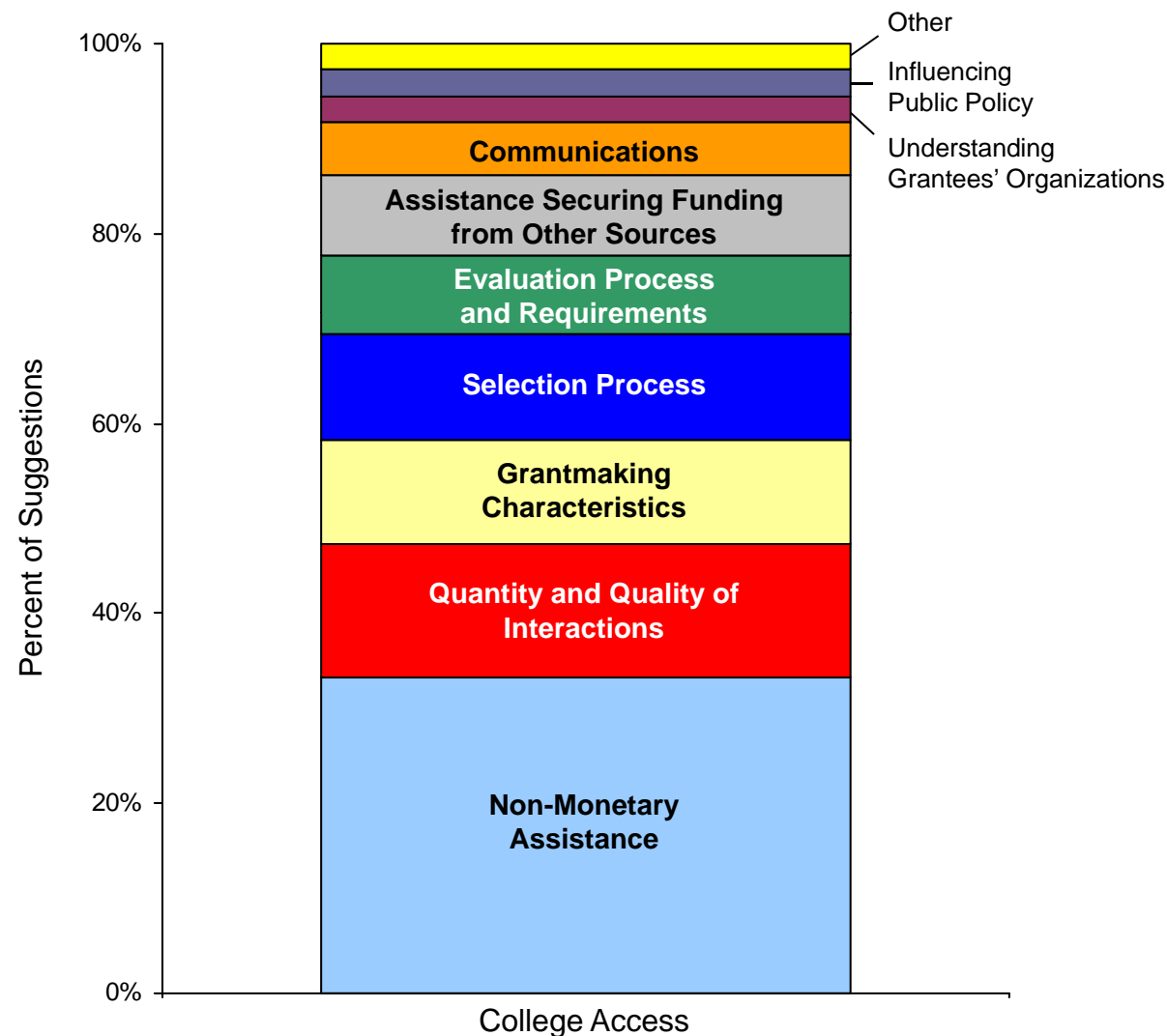
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Grantee Suggestions for the Foundation (1)

Grantees were asked to provide any suggestions for how the Foundation could improve. The most frequently mentioned suggestions for improvement concern the Foundation’s non-monetary assistance and interactions with grantees.

Topics of Grantee Suggestions



Note: Proportions may not sum to 100 percent due to rounding. There were a total of 36 grantee suggestions for College Access.

Grantee Suggestions for the Foundation (2)

% Grantee Suggestions		Grantee Suggestions
Topic of Grantee Suggestion		Sub-Themes and Sample of Comments
Non-Monetary Assistance	33%	<p>Collaboration: “It would be helpful if new grantees would be able to pair up with veteran grantees (who have similar objectives and types of students) to learn best practices to ensure better efficiency of our programs. The two meetings that were held for grantees (in L.A. and in San Jose) have opened our eyes to all the potential resources that are available to us.” “A more active role in linking grantees together within a mentor relationship would be great. Although the foundation provided opportunities for grantees to get together, [we’re] not exactly sure which ones they think are doing excellent work and would make good mentors. So, a mentoring program would be nice.”</p>
		<p>Other: “The Foundation does not look very closely at the academic preparedness and social support work that many groups do to better prepare students for college...I would hope that the foundation would consider ways that they could assist grantee organizations in saving resources/time by sponsoring SAT prep sessions, for example, in a region that grantee clients could access at reduced or no costs.” “We need more technical assistance in evaluation of our various components and more assistance in the data collection, data analysis elements.” “Workshops on fund development would also be great since organizations need to learn about how to not depend only on the Foundation’s support. Grant writing workshops would also help each organization grow.”</p>
Quantity and Quality of Interactions	14%	<p>“I would have preferred to continue working with the same program officer and wonder if it is possible to keep the same officer if the relationship is already built and is working for both the Foundation and the grantee. Or, figure out a way to make the transitions easier.” “It would be great to have the Program Officers and administrators visit the programs in person when their schedules allow.” “More site visits. More one on one face time.” “The only area for improvement we can identify is the time given to respond to requests. In a few instances we have been given three days to provide a significant amount of information.”</p>
Grantmaking Characteristics	11%	<p>“It would be very helpful to have grants awarded earlier in the spring, in order to give us enough time to select the scholarship recipients carefully. “Over several years, we have noted that the Foundation is requiring a lot more of their grantees in the areas of providing support services for students and in data collection, but the Foundation has moved away from providing funds for the administration and program costs that we incur to do this work. This hurts grantees. We are hopeful that the Foundation will not continue to add even more program restrictions and requirements to the funds they give to grantees.”</p>
Selection Process	11%	<p>“Grant guidelines can be a little restrictive (only responding to preset questions), allowing the grantee to provide other information and data can be more useful in the selection process.” “I’d like to see better alignment of application deadlines and review processes deadlines.”</p>

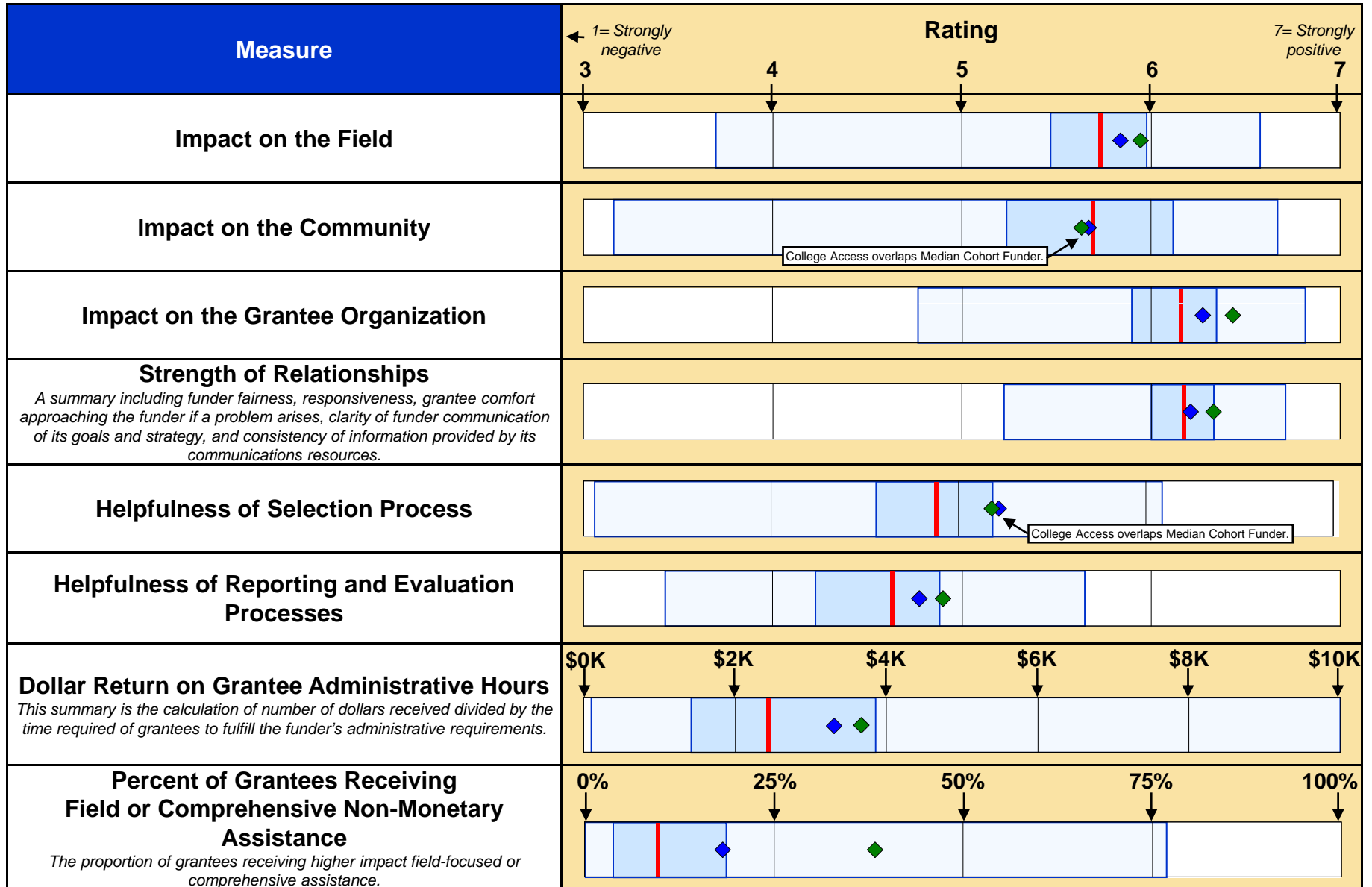
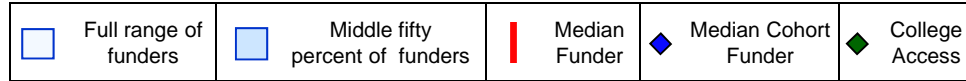
Grantee Suggestions for the Foundation (3)

% Grantee Suggestions		Grantee Suggestions
Topic of Grantee Suggestion		Sub-Themes and Sample of Comments
Assistance Securing Funding from Other Sources	8%	"It would be nice to share funding opportunities that other foundations may have for similar types of programs. This Foundation is always working with other foundations, so helping connect us with these foundations would be very well received." "As they are considering a 3 or 4 year cap on funding, I would appreciate help in securing other scholarships resources." "I'd love for the Foundation to provide resources on other possible funders for our programs."
Evaluation Process and Requirements	8%	"I would like to suggest that the foundation take a look at standardizing some of the format for scholarship work, especially with the data collection process. I would like to see some kind of reduction on the amount of information that is needed by the data collection project... While I know that we are measuring efficacy of dollars invested, and we need to look at persistence and shortest time to degree, I feel that when you look at barriers to higher education, the hoops we have needed to create in order to collect the requested data could be seen as a barrier as well." "The data collection is time consuming and relatively useless."
Communications	6%	"As mentioned earlier, the more upfront information we can get regarding requirements and reporting, the better. It helps us ensure we are set up to get the required information and substantially reduces our staff time involved in follow up." "I'm interested in learning more about the direction the Foundation is heading; at some point understanding the big picture of the Foundation's ultimate goals."
Understanding Grantees' Organizations	3%	"CAFC...should have an advisory board of grantees who can provide honest, open feedback about what it is like for us as college advisors working directly with students and administering these scholarships. They need to know what our needs are, what our students' concerns are, and be more responsive to them."
Influencing Public Policy	3%	"I would love to see the Foundation leverage some of its power to influence public policy in the arena of public education and undocumented student's rights."
Other	3%	"The foundation needs to have 'honest' conversations with people that can help them think through strategies."

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Analysis and Discussion (1)

Positive Impact on Grantees' Fields

Grantees describe the College Access Foundation of California (“College Access”) as a “leader” in their fields of work, but some grantees also indicate that the Foundation could take on a larger profile in the public eye. Compared to the typical funder, grantees rate College Access higher than typical for its impact on grantees’ fields and its advancement of knowledge in those fields. In addition, grantees rate the Foundation’s understanding of their fields higher than 90 percent of funders whose grantees CEP has surveyed. In the words of one grantee, “The foundation truly knows the landscape and how its money can be best spent - down to the very last dollar.”

While grantees report positive ratings on most field-related measures in the report, they rate only typically for the Foundation’s effect on public policy. Grantees also indicate that a more prominent public profile for the Foundation could have a positive impact on their organizations. When asked what type of impact the Foundation would have on their organization if it took on a higher profile in the media, before the public, and with policy decision-makers, 85 percent of grantees indicated that a higher profile would have a positive impact (rating a 5, 6, or 7 on a 1-7 scale). One grantee says, “I would love to see the Foundation leverage some of its power to influence public policy in the arena of public education and undocumented students’ rights.”

- ♦ *What policies and practices may have led to such positive ratings for the Foundation’s impact on and understanding of grantees’ fields of work, and how can the Foundation ensure they are maintained in the future?*
- ♦ *What has shaped the Foundation’s public engagement strategy thus far? How might the Foundation respond to grantees’ suggestions that the Foundation’s impact might be increased if it increased its public profile?*

Analysis and Discussion (2)

Impact on Grantees' Organizations and Sustainability of Funded Work

Overall, grantees rate the Foundation's impact on and understanding of their organizations more positively than the typical funder, although grantees rate the Foundation lower than typical for the sustainability of their funded work. Some grantees request additional support for the administration of their scholarship programs.

College Access offers larger and longer grants than those of the typical funder, and grantees are positive about the impact of this funding on their own organizations, rating the Foundation's impact on and understanding of their organizations above 75% of funders. In their comments, many grantees cite the Foundation's positive impact on their programmatic work. One grantee writes, "The Foundation, through its grant awards over the past [several] years, has enabled our program to raise its visibility, solidify its reputation, and increase its standing in the local education community. In addition, and more importantly, it has helped us help more than 100 students attend and persist in college."

Despite this, grantees rate the Foundation lower than 88 percent of funders for its impact on their ability to continue the funded work into the future. While the Foundation offers grants that fund nearly 10 percent of grantees' budgets – a higher proportion than 90 percent of funders – funding is primarily allocated to scholarships. A number of grantees request increased amounts of operating support to help administer programs. One grantee writes, "While funding is helpful, a program that works with youth as closely as ours requires a significant amount of staff time and involvement, so the amount of administrative support from the grant is small." Another grantee says, "The proportion of funding for operating support from the CAFC is less than the proportion of job duties pertaining to the college access and persistence of our scholars."

Grantees also point out alternatives to simply increasing operating support with some suggesting the Foundation could be of greater assistance to their efforts securing funding from other sources. One grantee remarks, "I'd love for the Foundation to provide resources on other possible funders for our programs," while another writes, "Workshops on fund development would also be great since organizations need to learn about how to not depend only on the Foundation's support. Grant writing workshops would also help each organization grow."

- ♦ *Do opportunities exist for the Foundation to increase the proportion of operating support it offers to grantees to help them administer programs?*
- ♦ *With which funders, and in what ways might Foundation staff be able to assist grantees in their efforts to secure funding from other sources?*

Analysis and Discussion (3)

Additional Support for the Reporting and Evaluation Process

Overall, grantees perceive the Foundation's reporting and evaluation process to be more helpful than typical, although grantees indicate that they would benefit from additional support and discussions of their reports/evaluations.

Grantees are spending more time than typical to complete the reporting and evaluation requirements of College Access and several grantees comment on the Foundation's "time consuming" requirements. In addition, while many grantees praise the rigor of the Foundation's reporting and evaluation process, several grantees indicate that they would benefit from more support. In one grantee's words, "they are placing many expectations on us for administering a scholarship program and reporting on it without providing any tools or staff funding to develop such a program." Another grantee says, "We need more technical assistance in evaluation of our various components and more assistance in the data collection, data analysis elements."

CEP's research findings, discussed in *Grantees Report Back*¹, indicate that discussions with Foundation staff following the submission of a report can increase the helpfulness of the reporting and evaluation process, and this holds true for College Access. Only a typical proportion of College Access grantees report discussing their completed reports or evaluations with the Foundation, and grantees that had these discussions rate the helpfulness of the process significantly higher than those that had not. These grantees also rate the Foundation higher for its impact on the sustainability of their funded work and for the effect on grantees' ability to meaningfully assess the funded work.

- ♦ *What steps has the Foundation taken to support its grantees as they complete the Foundation's reporting and evaluation process? How can the Foundation respond to grantees' requests for more technical assistance and support?*
- ♦ *What opportunities exist for the Foundation to discuss evaluations with a larger proportion of its grantees?*

Analysis and Discussion (4)

Increasing High Impact Forms of Non-Monetary Assistance

College Access offers the most helpful and intensive patterns of non-monetary assistance to a larger proportion of grantees than nearly all funders whose grantees CEP has surveyed.

CEP's field-wide research suggests that when grantees receive multiple types of assistance, in patterns that CEP has termed "field-focused" or "comprehensive" assistance, they rate their funder significantly higher across a number of measures¹. At College Access, the 38% of grantees that receive non-monetary assistance in these patterns rate higher on the quality of their relationships with the Foundation and the helpfulness of the selection process in strengthening the grantee and/or its programs. Many grantees cite field-related seminars, workshops, and convenings; and field-related research or best practices as the most valuable forms of assistance. "Any time college access programs can talk to each other about best practices, challenges, and successes is a good thing, and the Foundation is helping us come together on a consistent basis," writes one grantee. Another says, "The yearly conferences are great for networking, learning about best practices and better understanding the focus of the foundation."

Despite providing assistance in these high impact patterns, non-monetary assistance was a frequent request in grantees' suggestions for the Foundation. More specifically, grantees suggested "linking grantees together within a mentor relationship," and hosting "more frequent conferences."

- ♦ *Has the Foundation identified and documented the components that make its seminars/workshops/convenings and research or best practices so valuable?*
- ♦ *Are there opportunities for the Foundation to extend its non-monetary support even further, particularly by re-allocating resources to focus on the nonmonetary assistance that grantees find most valuable?*

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Racial Diversity

Measure	College Access				Full Dataset Median			
Foundation Communication Related to Racial Diversity								
<i>Has the Foundation communicated with you about racial diversity related to:</i>	Yes	No, but not relevant	No, but Foundation should	Don't know	Yes	No, but not relevant	No, but Foundation should	Don't know
The Foundation itself (staff, board, etc.)	14%	50%	14%	22%	15%	44%	15%	27%
The Foundation's programmatic work (funding, mission, programs)	74%	11%	4%	11%	37%	26%	15%	21%
The grantee's organization (staff, board, etc.)	15%	50%	11%	24%	26%	38%	14%	23%
The work associated with this grant in particular	60%	21%	6%	14%	35%	33%	11%	20%
Impact of Communication Related to Racial Diversity (only asked of grantees who indicated 'yes' to the relevant question above)								
Impact of communication on grantee's organization (1="Negative impact", 4="Neither positive nor negative impact", and 7="Positive impact")	5.7				5.1			
Impact of communication on grantee's work (1="Negative impact", 4="Neither positive nor negative impact", and 7="Positive impact")	5.0				5.2			
Relevance of Racial Diversity to Funded Work								
Percent of grantees who indicate that the work funded by this grant addresses topics in which racial diversity is a relevant component	84%				57%			

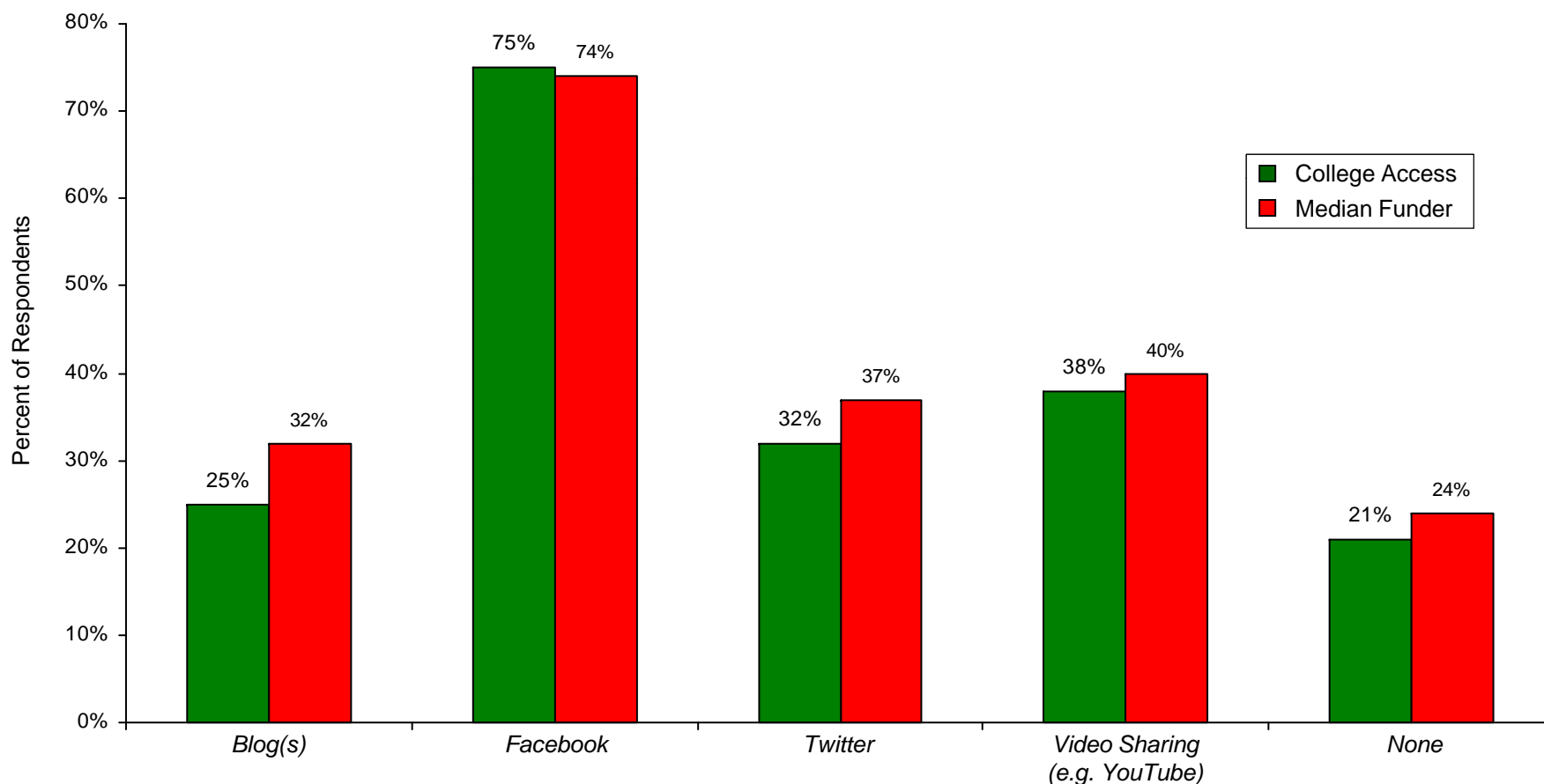
Note: This table includes data from 51 funders, except "Relevance of Racial Diversity to Funded Work" which includes data from 50 funders. Cohort funder data not available due to changes to the survey instrument.

Use of Online Resources (1)

Grantees were asked if their organization currently utilizes any online resources to communicate about its own work. The largest proportion of grantees said they utilize Facebook.

Proportion of Grantees Currently Using Online Resources

Scale ends at 80%

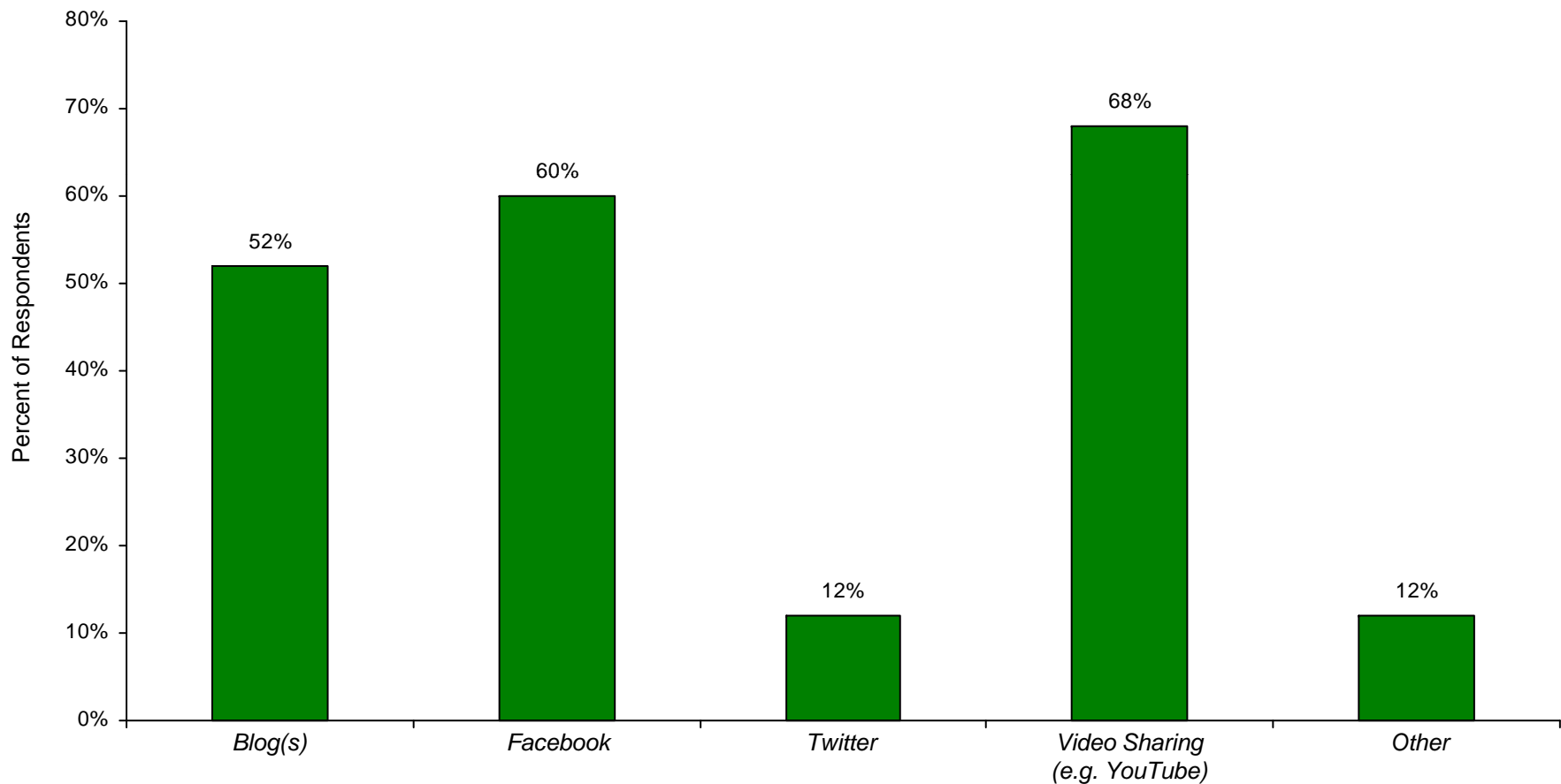


Use of Online Resources (2)

Grantees were asked if they would utilize the online resources below if they were available from the Foundation or its staff. The largest proportion of grantees said they would utilize video sharing.

Proportion of Grantees That Would Use Online Resources

Scale ends
at 80%



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Grantmaking Characteristics

Measure	College Access	Full Dataset Median	Cohort Funder Median
Length of Grant Awarded			
<i>Average grant length</i>	2.8 years	2.1 years	2.2 years
1 year	21%	51%	41%
2 years	30%	20%	27%
3 years	10%	17%	23%
4 years	33%	4%	5%
5 or more years	7%	8%	5%
Type of Grant Awarded			
Program/Project Support	16%	64%	51%
General Operating Support	0%	20%	25%
Capital Support: Building/Renovation/ Endowment Support/Other	0%	9%	12%
Technical Assistance	0%	5%	5%
Scholarship/Fellowship	84%	2%	8%
Event/Sponsorship Funding ¹	0%	N/A	N/A
Grant Amount Awarded			
<i>Median grant size</i>	\$200K	\$60K	\$146K
Less than \$10K	0%	11%	2%
\$10K - \$24K	0%	15%	8%
\$25K - \$49K	1%	15%	12%
\$50K - \$99K	15%	17%	17%
\$100K - \$149K	19%	10%	11%
\$150K - \$299K	45%	13%	22%
\$300K - \$499K	11%	6%	14%
\$500K - \$999K	5%	6%	9%
\$1MM and above	3%	7%	4%
Median Percent of Budget Funded By Grant (Annualized)			
Size of grant relative to size of grantee budget	9.8%	3.3%	4.6%

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 59 funders for which data is available, the average percentage of grantees indicating they received event/sponsorship funding was 2 percent.

Grantee Characteristics (1)

Measure	College Access	Full Dataset Median	Cohort Funder Median
Operating Budget of Grantee Organization			
<i>Median budget</i>	\$0.8MM	\$1.4MM	\$1.3MM
< \$100K	4%	8%	4%
\$100K - \$499K	25%	20%	19%
\$500K - \$999K	25%	14%	16%
\$1MM - \$4.9MM	35%	30%	33%
\$5MM - \$24.9MM	6%	18%	18%
\$25MM and above	4%	11%	9%
Length of Establishment of Grantee Organizations			
<i>Median length of establishment</i>	16 years	24 years	19 years
Less than 5 years	3%	7%	8%
5 - 9 years	17%	14%	15%
10 -19 years	40%	22%	26%
20 - 49 years	35%	36%	37%
50 - 99 years	4%	12%	9%
100 years or more	1%	9%	7%

Grantee Characteristics (2)

Measure	College Access	Full Dataset Median	Cohort Funder Median
Length of Time Which Grantees Have Regularly Conducted the Funded Programs			
Less than 1 year	0%	17%	12%
1 - 5 years	42%	51%	50%
6 - 10 years	8%	14%	15%
More than 10 years	50%	18%	23%
Pattern of Grantees' Funding Relationship with the Foundation¹			
First grant received from the Foundation	23%	31%	N/A
Consistent funding in the past	74%	51%	N/A
Inconsistent funding in the past	3%	18%	N/A
Length of Funding Relationship with the Foundation²			
1 - 5 years	91%	53%	N/A
6 - 10 years	9%	28%	N/A
More than 10 years	0%	19%	N/A
Funding Status and Grantees Previously Declined Funding			
Percent of grantees currently receiving funding from the Foundation	99%	75%	81%
Percent of grantees previously declined funding by the Foundation	10%	33%	28%

1: Represents data from 55 funders. This question includes a "don't know" response option; 0 percent of College Access respondents answered "don't know", compared to 2 percent at the median funder. Cohort funder data not available due to changes to the survey instrument.

2: Represents data from 55 funders. This question includes a "don't know" response option; 0 percent of College Access respondents answered "don't know", compared to 6 percent at the median funder. Cohort funder data not available due to changes to the survey instrument.

Grantee Characteristics (3)

Measure	College Access	Full Dataset Median	Cohort Funder Median
Job Title of Respondents¹			
Executive Director	32%	45%	N/A
Development Director	4%	9%	N/A
Other Senior Management	11%	14%	N/A
Project Director	32%	14%	N/A
Other Development Staff	5%	6%	N/A
Volunteer	1%	1%	N/A
Other	15%	10%	N/A
Gender of Respondents²			
Female	73%	63%	65%
Male	27%	37%	35%
Race/Ethnicity of Respondents³			
Caucasian/White	58%	80%	69%
African-American/Black	13%	7%	12%
Hispanic/Latino	22%	4%	8%
Asian (incl. Indian subcontinent)	3%	3%	6%
Multi-racial	3%	3%	3%
American Indian/Alaskan Native	1%	1%	1%
Pacific Islander	0%	0%	0%
Other	0%	1%	2%

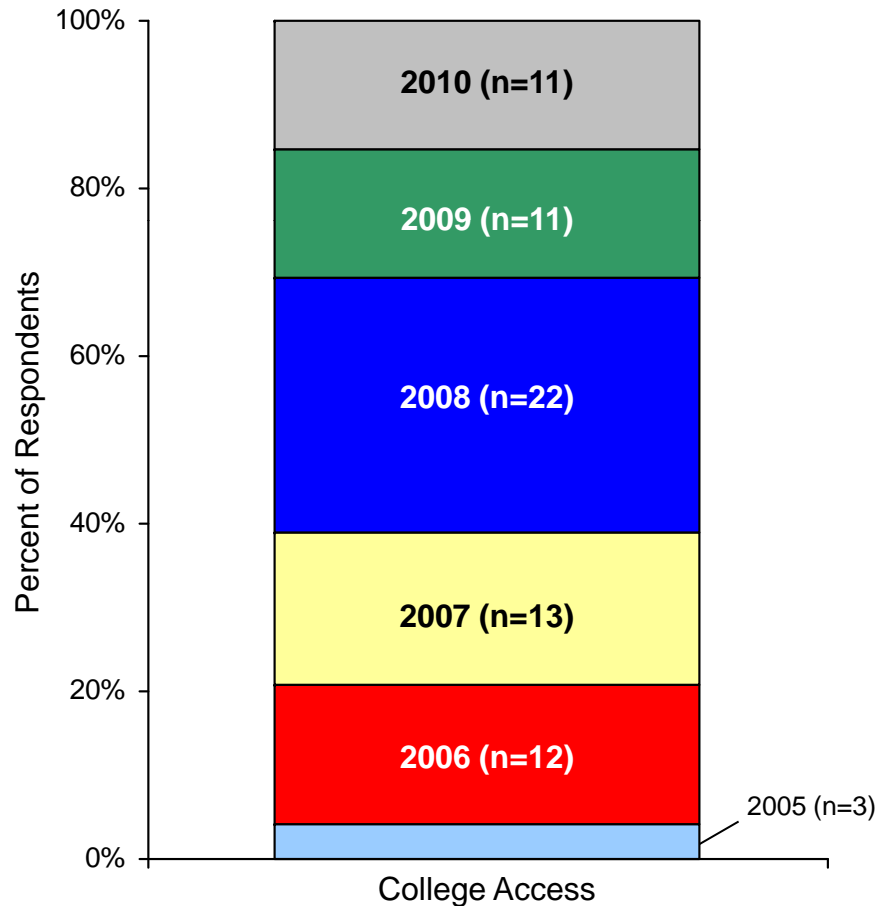
1: Represents data from 55 funders. Cohort Funder data not available due to changes to the survey instrument.

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 3 percent of College Access 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 4 percent of College Access respondents selected "prefer not to say," compared to 5 percent at the median funder.

Year First Grant was Received

In which year did you receive your first grant from the Foundation?

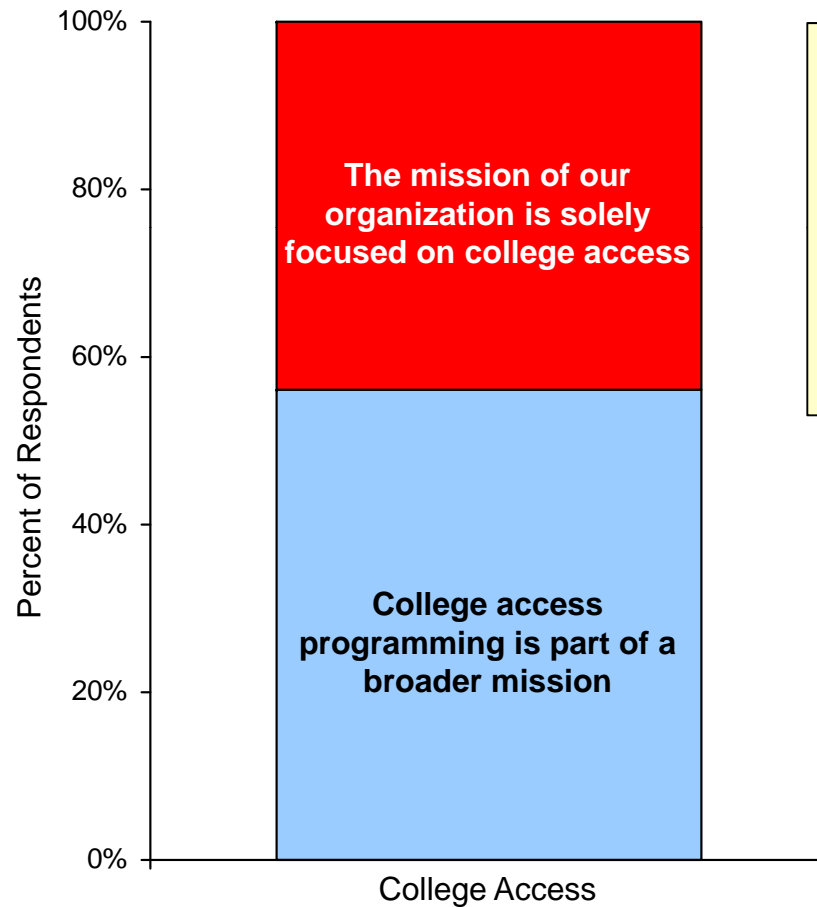


Behind the Numbers – Variation by First Grant Year
 Grantees who received their first grant in 2008 rate the Foundation significantly less positively than those who received their first grants in other years on the following measures:

- Impact on grantees’ local communities
- Impact on grantees’ fields
- Impact on grantees’ organizations
- Understanding grantees’ goals and strategies
- Impact on the sustainability of the work funded
- Relationships with its grantees
 - Comfort approaching the Foundation if a problem arises
 - Responsiveness of Foundation staff
 - Fairness of treatment by the Foundation
 - Clarity of communication
 - Consistency of communication
- Helpfulness of the selection process
- Helpfulness of the evaluation process
- Helpfulness of non-monetary assistance
- Effect on grantees’ ability to meaningfully assess the results of the work funded

Note: Comparative data not available because this question was only asked of College Access grantees. One grantee selected “Don’t Know.”

“Is the mission of your organization solely focused on college access, or is this part of a broader mission?”

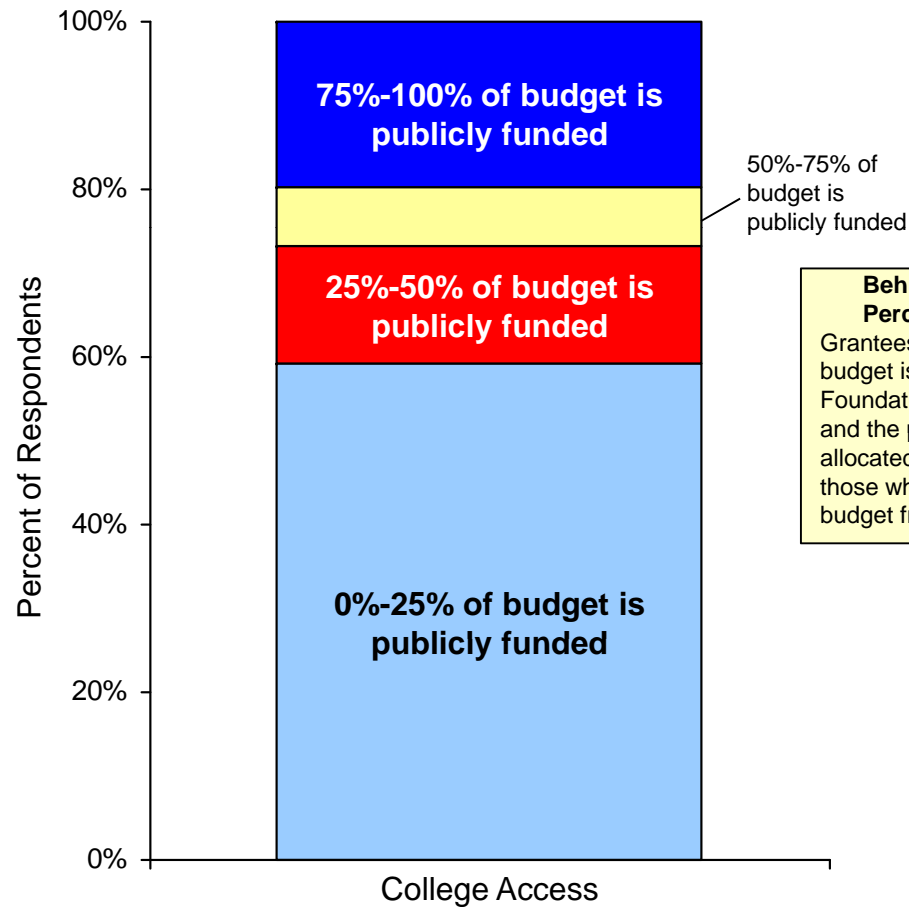


Behind the Numbers – Variation by Mission Focus
 Grantees who indicated the mission of their organization is solely focused on college access rate the Foundation more positively than those whose college access programming is part of a broader mission on the following measures:

- Impact on grantees’ organizations
- Understanding grantees’ goals and strategies
- Consistency of information provided in its communication resources

Percent of Budget Publicly Funded

“Please indicate the approximate level of public funding received by your organization”

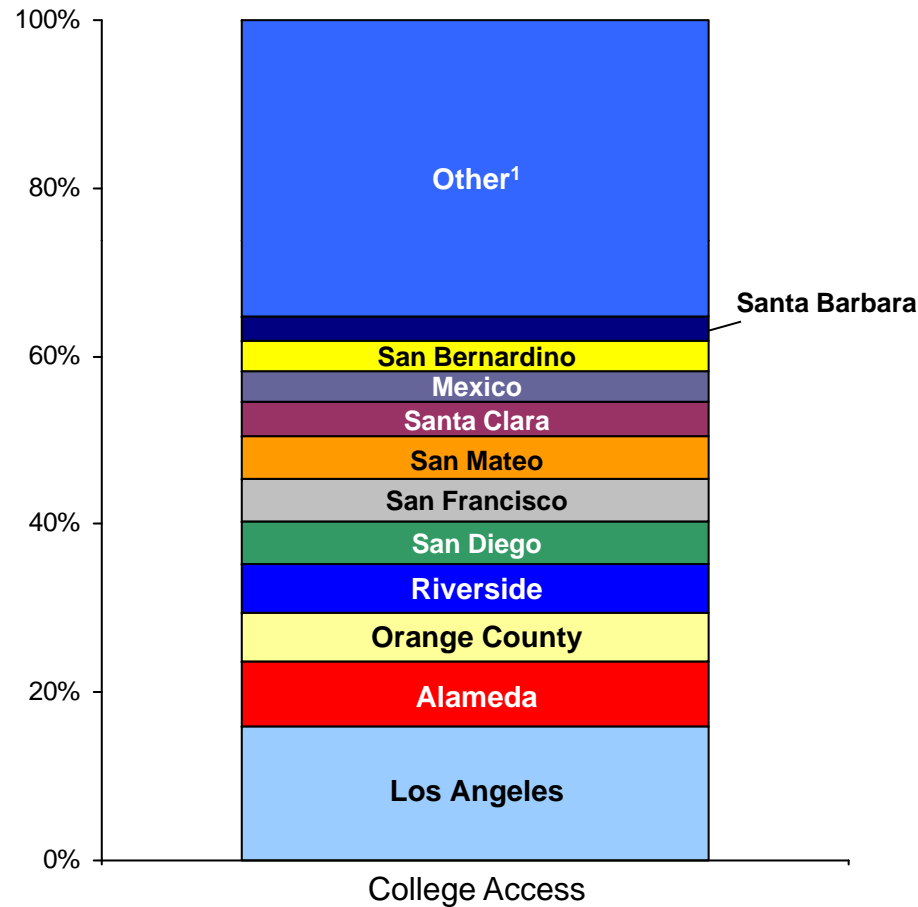


Behind the Numbers – Variation by Percent of Budget Publicly Funded
Grantees who reported that 0%-25% of their budget is publicly funded rate the Foundation's impact on their organization and the proportion of operating support allocated in their grant less positively than those who receive more than 25% of their budget from public funds.

Note: Comparative data not available because this question was only asked of College Access grantees.

Award Recipients' County of Origin

Grantees were asked to name up to three counties of origin for the students who received scholarships through the College Access Foundation of California grant. The counties most frequently mentioned were Los Angeles and Alameda.



Note: Comparative data not available because this question was only asked of College Access grantees.

1: Counties with fewer than 4 responses are included in the "Other" category. These counties include: (3) Contra Costa, Del Norte, Humboldt, Kern, Sonoma, United States; (2) Marin, Mendocino, Sacramento, Shasta, Siskiyou, Ventura, West Contra Costa; (1) China, El Salvador, Ethiopia, Fresno, Guatemala, Hong Kong, Imperial County, India, Merced, Philippines, San Benito, San Joaquin, San Luis Obispo, Solano, Stanislaus, Tehema, Tulare.

Funder Characteristics

Measure	College Access	Full Dataset Median	Cohort Funder Median
Financial Information			
Total assets	\$426.0MM	\$255.0MM	\$453.7MM
Total giving	\$13.8MM	\$15.0MM	\$21.7MM
Administrative Expenses			
Administrative expense as percent of total assets	0.7%	1.2%	1.0%
Administrative expense as percent of total giving	21.7%	21.6%	22.1%
Funder Staffing¹			
Total staff (FTEs)	14	13	20
Percent of staff (FTEs) actively managing grantee relationships ²	36%	39%	N/A
Percent of staff who are program staff	29%	56%	54%
Grantmaking Processes			
Proportion of grants that are proactive ³	5%	50%	85%
Proportion of grantmaking dollars that are proactive ⁴	22%	50%	73%

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

2: Includes data from 28 funders. Cohort Funder data not available due to changes to the survey instrument.

3: Includes data from 43 funders

4: Includes data from 94 funders

Source: Self-reported data provided by and other GPR and Operational Benchmarking Report (OBR) subscribers from 2003-2011 survey rounds.

Funders in Dataset

The 264 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 Cleveland Foundation	The Greater Cincinnati Foundation	Mary Reynolds Babcock Foundation	The Robin Hood Foundation
Adolph Coors Foundation*	The Clowes Fund	Gulf Coast Community Foundation of Venice	Mathile Family Foundation*	Rockefeller Brothers Fund
The Ahmanson Foundation*	College Access Foundation of California	Hall Family Foundation*	The McKnight Foundation	Rockefeller Foundation
Alaska Mental Health Trust Authority	The Collins Foundation*	Hampton Roads Community Foundation	Medina Foundation	Rollin M. Gerstacker Foundation*
Alfred P. Sloan Foundation*	The Colorado Health Foundation	Harold K.L. Castle Foundation	MetroWest Community Health	Rose Community Foundation
Alliance for California Traditional Arts	The Colorado Trust	The Harry and Jeanette Weinberg Foundation, Inc	Care Foundation	Russell Family Foundation
Alphawood Foundation*	The Columbus Foundation	Hartford Foundation for Public Giving	Meyer Memorial Trust*	Ruth Mott Foundation
Altman Foundation*	and Affiliated Organizations	The Harvest Foundation of the Piedmont	Michael Reese Health Trust	S & G Foundation, Inc.*
The Ambrose Monell Foundation*	Community Foundation Silicon Valley	Health Foundation of Greater Cincinnati	The Minneapolis Foundation	S. H. Cowell Foundation
Amelia Peabody Foundation*	Community Memorial Foundation	The Heinz Endowments	Missouri Foundation for Health	Saint Luke's Foundation of Cleveland, Ohio
Amon G. Carter Foundation*	Community Technology Foundation of California	Helen Andrus Benedict Foundation	The Morris and Gwendolyn	The Saint Paul Foundation Inc.
Andersen Foundation*	Connecticut Health Foundation, Inc.	Henry H. Kessler Foundation	Cafritz Foundation	Santa Barbara Foundation
Ann Arbor Area Community Foundation	Conrad N. Hilton Foundation	Hess Foundation, Inc.*	Ms. Foundation for Women	SC Ministry Foundation
The Annenberg Foundation*	Cultural Council of Santa Cruz County	Horace W. Goldsmith Foundation*	The Mt. Sinai Health Care Foundation	Sea Change Foundation
The Anschutz Foundation*	Daniels Fund*	The Horizon Foundation for New Jersey	The Nathan Cummings Foundation	Shelton Family Foundation*
Arcus Foundation	Danville Regional Foundation	Houston Endowment, Inc.	Nellie Mae Education Foundation	The Sherman Fairchild Foundation, Inc.*
Arts Council Silicon Valley	The David and Lucile Packard Foundation	HRJ Consulting	The New Hampshire Charitable Foundation	The Shubert Foundation*
The Assisi Foundation of Memphis, Inc.	Dekko Foundation, Inc.	Humanity United	New Profit, Inc.	The Skillman Foundation
The Atlantic Philanthropies	Doris Duke Charitable Foundation	The Hyams Foundation, Inc.	New York Community Trust	The Skoll Foundation
AVI CHAI Foundation	The Duke Endowment	J.A. & Kathryn Albertson Foundation*	New York State Health Foundation	Stuart Foundation
Baptist Community Ministries*	Dyson Foundation	J. Bulow Campbell Foundation*	Nina Mason Pulliam Charitable Trust	Surdna Foundation, Inc.
Barr Foundation	E. Rhodes & Leona B. Carpenter Foundation*	The J. Willard and	Nord Family Foundation	Susan G. Komen
Beldon Fund	East Bay Community Foundation	Alice S. Marriott Foundation*	Northern Rock Foundation	Breast Cancer Foundation
Bill & Melinda Gates Foundation	Eden Hall Foundation*	Jacob and Valeria Langeloth Foundation	Northwest Area Foundation	T.L.L. Temple Foundation*
Blandin Foundation	The Educational Foundation of America	James Graham Brown Foundation, Inc.*	Northwest Health Foundation	Thrivent Financial for Lutherans Foundation
Blue Cross and Blue Shield of	El Pomar Foundation*	The James Irvine Foundation	Omidyar Foundation	United Way of Massachusetts Bay
North Carolina Foundation	Endowment for Health	The Jay and Rose	One Foundation	Vancouver Foundation
Blue Cross Blue Shield of	The Energy Foundation	Phillips Family Foundation*	Ontario Trillium Foundation	The Vermont Community Foundation
Massachusetts Foundation	The Erie Community Foundation	Jessie Ball duPont Fund	The Overbrook Foundation*	Victoria Foundation, Inc.*
Blue Shield of California Foundation	Eugene and Agnes E. Meyer Foundation	The Jim Joseph Foundation	Partnership for Excellence in	Virginia G. Piper Charitable Trust
Boston Foundation, Inc.	Evelyn and Walter Haas, Jr. Fund	The Josiah Macy, Jr. Foundation	Jewish Education (PEJE)	W. K. Kellogg Foundation
Bradley Foundation*	F. M. Kirby Foundation, Inc.*	The John A. Hartford Foundation, Inc.	Paul G. Allen Foundations	Wachovia Regional Foundation
Bradley-Turner Foundation*	The F.B. Heron Foundation	John D. and Catherine T.	Paul Hamlyn Foundation	Waitt Family Foundation*
The Brainerd Foundation	The Fan Fox and	MacArthur Foundation	Peninsula Community Foundation	The Wallace Foundation
The Brinson Foundation	Leslie R. Samuels Foundation*	John H. and Wilhelmina D. Harland	The Pears Foundation	Walter & Elise Haas Fund
The Broad Foundation	Fannie Mae Foundation	Charitable Foundation, Inc.	The Peter and	Wayne & Gladys Valley Foundation
The Brown Foundation	First 5 Alameda	John P. McGovern Foundation*	Elizabeth C. Tower Foundation	Weingart Foundation*
Bush Foundation	County – Every Child Counts	The John R. Oishei Foundation	PetSmart Charities	Wellington Management Charitable Fund
California Community Foundation	The Ford Family Foundation	John S. and James L. Knight Foundation	The Pew Charitable Trusts*	Wilburforce Foundation
The California Endowment	The Ford Foundation	Kalamazoo Community Foundation	Philadelphia Foundation	William Caspar Graustein Memorial Fund
California HealthCare Foundation	France-Merrick Foundation*	Kansas Health Foundation	The Pittsburgh Foundation	The William and Flora Hewlett Foundation
The California Wellness Foundation*	Friends Provident Foundation	Kate B. Reynolds Charitable Trust*	Polk Bros. Foundation	The William K. Warren Foundation*
The Cannon Foundation, Inc.*	The Frist Foundation*	Kendeda Fund	Pritzker Foundation*	William Penn Foundation
Caring for Colorado Foundation	The GAR Foundation	The Kresge Foundation	PSEG Foundation	The William Randolph Hearst Foundations*
Carnegie Corporation of New York	Gates Family Foundation*	Kronkosky Charitable Foundation	Corporate Responsibility Department	The William Stamps Farish Fund*
Carrie Estelle Doheny Foundation*	Gaylord and Dorothy	The Lenfest Foundation, Inc.*	Public Welfare Foundation*	William T. Kemper Foundation*
The Case Foundation	Donnelley Foundation	Levi Strauss Foundation	Quantum Foundation	Williamsburg Community
Central Indiana Community Foundation	General Mills Foundation	Lloyd A. Fry Foundation	The Ralph M. Parsons Foundation*	Health Foundation
The Champlin Foundations*	The George Gund Foundation	Longwood Foundation	Raskob Foundation for	Windgate Charitable Foundation, Inc.*
Charles and Helen Schwab Foundation	The George S. and Dolores	The Louis Calder Foundation*	Catholic Activities, Inc.	Winter Park Health Foundation
Charles and Lynn Schusterman	Dore Eccles Foundation*	Lucile Packard Foundation	Rasmuson Foundation	Woods Fund of Chicago
Family Foundation	Geraldine R. Dodge Foundation	for Children's Health	The Raymond John Wean Foundation	Yad Hanadiv
Charles Stewart Mott Foundation	The Gill Foundation	Lumina Foundation for Education, Inc.	Resources Legacy Fund	Z. Smith Reynolds Foundation, Inc.
The Chicago Community Trust	The Goizueta Foundation	Maine Community Foundation	The Rhode Island Foundation	Zeist Foundation
The Christensen Fund	Gordon and Betty Moore Foundation	Maine Health Access Foundation	Richard & Rhoda Goldman Fund	
The Clark Foundation*	Gable Foundation	Marguerite Casey Foundation	Richard King Mellon Foundation*	
Claude Worthington Benedum Foundation	Grand Rapids Community Foundation		The Robert Wood Johnson Foundation	

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About the Center for Effective Philanthropy (CEP)

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.

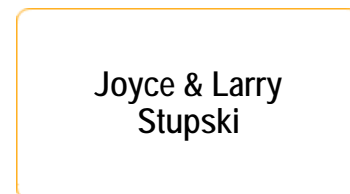
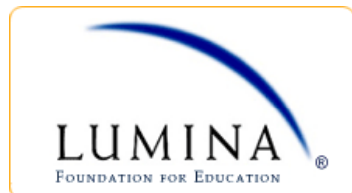
Vision

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 Funders

CEP is funded through a combination of foundation grants and revenue earned from management tools and seminars. Funders providing support for CEP's work include:



CEP Research

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>Toward a Common Language: Listening to Foundation CEOs and Other Experts Talk About Performance Measurement in Philanthropy</i> (2002)
	<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)
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)
Funder Governance	<i>Foundation Governance: The CEO Viewpoint</i> (2004)
	<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>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)
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)
Non-Monetary Assistance	<i>More than Money: Making a Difference with Assistance Beyond the Grant</i> (2008)

CEP Assessment Tools

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
- **Comparative Board Report (CBR):** provides data on board structure and trustee perceptions of board effectiveness on a comparative basis
- **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
- **Multidimensional Assessment Process (MAP):** provides an integrated assessment of performance, assimilating results and data from all of CEP's assessment tools into key findings, implications, and recommended action steps for greater effectiveness
- **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
- **Beneficiary Perception Report (BPR):** informs the work of funders and grantees by providing comparative feedback from those whose lives funders seek to improve – the ultimate beneficiaries of funders' philanthropic efforts
- **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.

Contact Information

- ◆ This report was produced for College Access Foundation of California by the Center for Effective Philanthropy in June, 2011.

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