Grantee Perception Report®
prepared for
S.H. Cowell Foundation
January 2012

Excerpt
Executive Summary – Key Findings

Cowell is one of highest rated foundations among funders whose grantees CEP has surveyed. Across most dimensions on the grantee survey, Cowell receives very high ratings – often times above ninety percent of surveyed foundations and above the median funder in a smaller subset of peer foundations. In fact, Cowell scored higher than all foundations in CEP’s dataset on two measures: the effect of the grant on the organization’s ability to be effective in achieving its goals and the helpfulness of the Foundation’s non-monetary resources.

Since first using the GPR in 2004, Cowell has seen improvement on a number of measures, most notably its understanding of grantees’ fields and goals and the helpfulness of its selection process. Grantee comments and ratings suggest that despite recent changes to the Foundation’s processes, Cowell grantees continue to be satisfied with the Foundation’s processes and communications.

Compared to grantees at the median foundation, Cowell grantees spend more time on administrative processes, including the proposal, selection, and evaluation processes. Despite the higher than typical time commitment, some Cowell grantees find these processes helpful and informative. Specifically, grantees who have a site visit or discuss their evaluations with Foundation staff, despite often spending more time on these processes, rate the Foundation higher on a number of measures.

Cowell grantees indicate that the Foundation has a higher than typical impact on their organizations and understanding of their organizations. However, despite high ratings for impact on local communities, Cowell grantees rate the Foundation’s understanding of their local communities only typically. Some grantees note that they are “less clear on Cowell’s impact here in [my] community.”

Overall, Cowell grantees indicate they are satisfied with their interactions with the Foundation. However, ratings from grantees who interact with the Foundation in different ways vary, suggesting some interactions are more beneficial than others. Grantees that have had interacted with staff monthly or more often and have had the opportunity to discuss their completed evaluations, for example, have more positive impressions of the Foundation, as measured by areas such as the Foundation’s understanding of their organization and the clarity of Foundation communications.
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.

- 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

<table>
<thead>
<tr>
<th>Survey</th>
<th>Survey Period</th>
<th>Fiscal Year of Surveyed Grantees</th>
<th>Number of Grantees Surveyed</th>
<th>Number of Responses Received</th>
<th>Survey Response Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cowell 2011</td>
<td>September and October 2011</td>
<td>2010</td>
<td>97</td>
<td>81</td>
<td>84%</td>
</tr>
<tr>
<td>Cowell 2004</td>
<td>September and October 2004</td>
<td>2003</td>
<td>61</td>
<td>56</td>
<td>92%</td>
</tr>
<tr>
<td>Median Foundation</td>
<td>2003-2001</td>
<td>2003-2011</td>
<td>-</td>
<td>-</td>
<td>68%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Program Area</th>
<th>Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Affordable Housing</td>
<td>4</td>
</tr>
<tr>
<td>Family Resource Center</td>
<td>16</td>
</tr>
<tr>
<td>Responsive</td>
<td>4</td>
</tr>
<tr>
<td>Education</td>
<td>24</td>
</tr>
<tr>
<td>Youth Development</td>
<td>26</td>
</tr>
<tr>
<td>Don’t Know</td>
<td>6</td>
</tr>
</tbody>
</table>
### Methodology – Comparative Data

#### Full Comparative Set

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td>Grantee Responses</td>
<td>40,365 grantees</td>
</tr>
<tr>
<td>Philanthropic Funders</td>
<td>273 funders</td>
</tr>
</tbody>
</table>

#### Regionally-Focused Funders

<table>
<thead>
<tr>
<th>Regionally-Focused Funders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clowes Fund</td>
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<tr>
<td>GAR Foundation</td>
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<tr>
<td>Hyams Foundation</td>
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<tr>
<td>Medina Foundation</td>
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<tr>
<td>Peter and Elizabeth C. Tower Foundation</td>
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<tr>
<td>Raymond Jean Wean Foundation</td>
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<tr>
<td>Ruth Mott Foundation</td>
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<tr>
<td>S.H. Cowell Foundation</td>
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<tr>
<td>Sobrato Family Foundation</td>
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<tr>
<td>The Brinson Foundation</td>
</tr>
<tr>
<td>William Caspar Graustein Memorial Fund</td>
</tr>
</tbody>
</table>
Impact on Grantees’ Fields

Selected Grantee Comments

- “The Cowell Foundation has a deep understanding of the youth development field, its history and the importance of the work…. Their long-term commitment has been terrifically important to the field and its continued sustenance.”
- “Cowell has been pushing the field to consider broader funding. No one has challenged the field to incorporate knowledge from other individuals/agencies experiences into their activities as much as Cowell.”
Understanding of Grantees’ Fields

III. Impact on Grantee Fields and Local Communities
Advancing Knowledge in Fields

Advancing Knowledge in Grantees’ Fields

Leads the field to new thinking and practice

Median Regionally-Focused Funder
Middle fifty percent of funders
Median Funder

Full range of funders
Cowell 2004
Cowell 2011

Range of Regionally-Focused Funders
Understanding of Grantees’ Local Communities

Note: Scale starts at 3.0

III. Impact on Grantee Fields and Local Communities

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Impact on Grantee Organizations

Selected Grantee Comments

- “Through funding, we are able to increase our capacity to work on larger initiatives that take our organization beyond day-to-day programming.”
- “[This grant] has also helped us to think more clearly about the need for defined outcomes. Our work is more targeted and less random.”
Understanding of Grantees’ Goals and Strategy

Note: Scale starts at 4.0
Effect on Grantees Achieving Their Goals

*Funder’s Effect on Grantees’ Ability to be Effective in Achieving Organization’s Goals*

- **7.0**: Significantly enhanced our ability
- **6.0**: Enhanced our ability
- **5.0**: Neither detracted nor enhanced our ability
- **4.0**: Neither detracted nor enhanced our ability
- **3.0**: Significantly detracted from our ability
- **2.0**: Significantly detracted from our ability

Note: Scale starts at 4.0

- Full range of funders
- Middle fifty percent of funders
- Median Funder
- Median Regionally-Focused Funder
- Range of Regionally-Focused Funders
- Cowell 2011
Funder-Grantee Relationships Summary

Key Components of Funder-Grantee Relationships Measure

- Fairness of treatment by funder
- Clarity of communication of funder’s goals and strategy
- Comfort approaching funder if a problem arises
- Responsiveness of funder staff
- Consistency of information provided by different communications

Note: Scale starts at 4.0
Frequency of Interactions

Frequency of Grantee Contact with Program Officer During Grant

Proportion of grantees that interact with their PO yearly or less often:

- **Cowell 2011**: 9%
- **Cowell 2004**: 5%
- **Average of all Funders**: 25%
- **Average of Regionally-Focused Funders**: 20%

- Yearly or less often
- Once every few months
- Monthly
- A few times a month
- Weekly
Communications Measures

**Clarity of Funder Communication of Goals and Strategy**

- **Extremely clearly**
- **Completely consistent**

Cowell 2011 overlaps the median Regionally-Focused Funder.

**Consistency of Information Provided by Communications Resources**

- **Completely consistent**
- **Not at all consistent**

Note: Scale starts at 4.0

Cowell 2011
Cowell 2004

Full range of funders
Middle fifty percent of funders
Median Funder
Median Regionally-Focused Funder
Range of Regionally-Focused Funders

Note: Scale starts at 4.0
Helpfulness of Selection Process to Organizations/Programs

Selected Grantee Comments

- “The [proposal] process was iterative and interactive with Cowell Staff. It was very helpful in putting the proposal together”
- “Regarding the processes used in the selection at times it has seem a bit overwhelming.”
Updated Foundation Processes

Foundation Characteristics

- Scope of work for next set of goals: 6.6
- A case for continued support: 6.5
- The results of the previous grant: 6.3
- Reflections on lessons learned: 6.3

Average Rating:
- 6.6
- 6.5
- 6.3
- 6.3

Percent of Respondents

7 = Very Well
6 = Very Satisfactory
5 = Satisfactory
4 = Somewhat Satisfactory
3 = Poor
2 = Very Poor
1 = Very Unsatisfactory
0% = None
Helpfulness of Reporting and Evaluation Processes

Selected Grantee Comments

- “The evaluation we will be conducting with the support of Cowell will facilitate our understanding of the sustainability of our program. Study results will help us determine future program development and enhancement.”
Discussion of Report or Evaluation

Percentage of Grantees That Report Discussing Completed Reports or Evaluations With Staff

- Full range of funders
- Middle fifty percent of funders
- Median Funder
- Median Regionally-Focused Funder
- Range of Regionally-Focused Funders

Cowell 2011
Cowell 2004
### Non-Monetary Assistance Summary (1)

#### Non-Monetary Assistance Activities Included in Summary

**MANAGEMENT ASSISTANCE**
- General management advice
- Strategic planning advice
- Financial planning/accounting
- Development of performance measures

**FIELD-RELATED ASSISTANCE**
- Encouraged/facilitated collaboration
- Insight and advice on your field
- Introductions to leaders in field
- Provided research or best practices
- Provided seminars/forums/convenings

**OTHER ASSISTANCE**
- Board development/governance assistance
- Information technology assistance
- Communications/marketing/publicity assistance
- Use of Foundation facilities
- Staff/management training

#### Definitions of Patterns of Assistance

**Comprehensive Assistance**
Grantees receiving at least 7 forms of assistance

**Field-Focused Assistance**
Grantees receiving at least 3 forms of field-related assistance but less than 7 forms of assistance overall

**Little Assistance**
Grantees receiving at least one form of assistance but not falling into the above categories

**No Assistance**
Grantees not receiving non-monetary support

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### Selected Grantee Comments

- “Their site visits and the Board retreat gave our community partners a place to shine as well.”
- “The Leadership Retreats are a powerful tool for strengthening community and organizational capacity.”
Non-Monetary Assistance Summary (2)

Non-Monetary Assistance Patterns

<table>
<thead>
<tr>
<th>Percent of Respondents</th>
<th>Cowell 2011</th>
<th>Cowell 2004</th>
<th>Average of all Funders</th>
<th>Average of Regionally-Focused Funders</th>
</tr>
</thead>
<tbody>
<tr>
<td>No assistance</td>
<td>0%</td>
<td>57%</td>
<td>77%</td>
<td>65%</td>
</tr>
<tr>
<td>Little assistance</td>
<td>0%</td>
<td>2%</td>
<td>9%</td>
<td>12%</td>
</tr>
<tr>
<td>Field-focused assistance</td>
<td>98%</td>
<td>23%</td>
<td>13%</td>
<td>22%</td>
</tr>
<tr>
<td>Comprehensive assistance</td>
<td>2%</td>
<td>3%</td>
<td>13%</td>
<td>22%</td>
</tr>
</tbody>
</table>

Proportion of grantees that receive field or comprehensive assistance

- Cowell 2011: 36%
- Cowell 2004: 25%
- Average of all Funders: 13%
- Average of Regionally-Focused Funders: 12%
Helpfulness of Non-Monetary Assistance

Note: Scale starts at 4.0
Field-Related Assistance Activities

Frequency of Field-Related Assistance Activities

- **Encouraged/Facilitated Collaboration**: 44% to 45%
- **Insight and Advice on Grantees' Fields**: 40% to 34%
- **Seminars/Forums/Convenings**: 44%
- **Introduction to Leaders in Grantees' Fields**: 47%
- **Provided Research or Best Practices**: 23% to 15%

Scale ends at 50%
Leadership Development Activities

“This activity helped to deepen my work.”

- Grant for leadership or organizational development: 100% agreement, 6.9 average rating, 26% of respondents participated.
- Grantee leadership convening at Chaminade: 80% agreement, 6.5 average rating, 56% of respondents participated.
- Site visit to another Cowell grantee: 70% agreement, 6.1 average rating, 25% of respondents participated.

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To what extent has collaborating with other Cowell grantees improved your organization and the community in which you work?

- **7=To a Great Extent**: 100%
- **6**: 80%
- **5**: 70%
- **4**: 60%
- **3**: 40%
- **2**: 20%

Cowell Average Rating: 6.0
### Review of Findings

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<th>Rating</th>
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<tr>
<td><strong>Impact on the Community</strong></td>
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<tr>
<td><strong>Strength of Relationships</strong></td>
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<td><strong>Helpfulness of Selection Process</strong></td>
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<td><strong>Helpfulness of Reporting and Evaluation Processes</strong></td>
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<tr>
<td><strong>Dollar Return on Grantee Administrative Hours</strong></td>
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<tr>
<td><strong>Percent of Grantees Receiving Field or Comprehensive Non-Monetary Assistance</strong></td>
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#### Measure

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#### Rating

1 = Strongly negative  
7 = Strongly positive

- **Impact on the Field**
- **Impact on the Community**
- **Strength of Relationships**
- **Helpfulness of Selection Process**
- **Helpfulness of Reporting and Evaluation Processes**
- **Dollar Return on Grantee Administrative Hours**
- **Percent of Grantees Receiving Field or Comprehensive Non-Monetary Assistance**

- **Strength of Relationships**
  A summary including funder fairness, responsiveness, grantee comfort approaching the funder if a problem arises, clarity of funder communication of its goals and strategy, and consistency of information provided by its communications resources.

- **Helpfulness of Selection Process**

- **Helpfulness of Reporting and Evaluation Processes**

- **Dollar Return on Grantee Administrative Hours**
  This summary is the calculation of number of dollars received divided by the time required of grantees to fulfill the funder's administrative requirements.

- **Percent of Grantees Receiving Field or Comprehensive Non-Monetary Assistance**
  The proportion of grantees receiving higher impact field-focused or comprehensive assistance.