

CONFIDENTIAL

Grantee Perception Report®

prepared for

S.H. Cowell Foundation

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Excerpt

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EFFECTIVE PHILANTHROPY

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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

Survey	Survey Period	Fiscal Year of Surveyed Grantees	Number of Grantees Surveyed	Number of Responses Received	Survey Response Rate
Cowell 2011	September and October 2011	2010	97	81	84%
Cowell 2004	September and October 2004	2003	61	56	92%
Median Foundation	2003-2001	2003-2011	-	-	68%

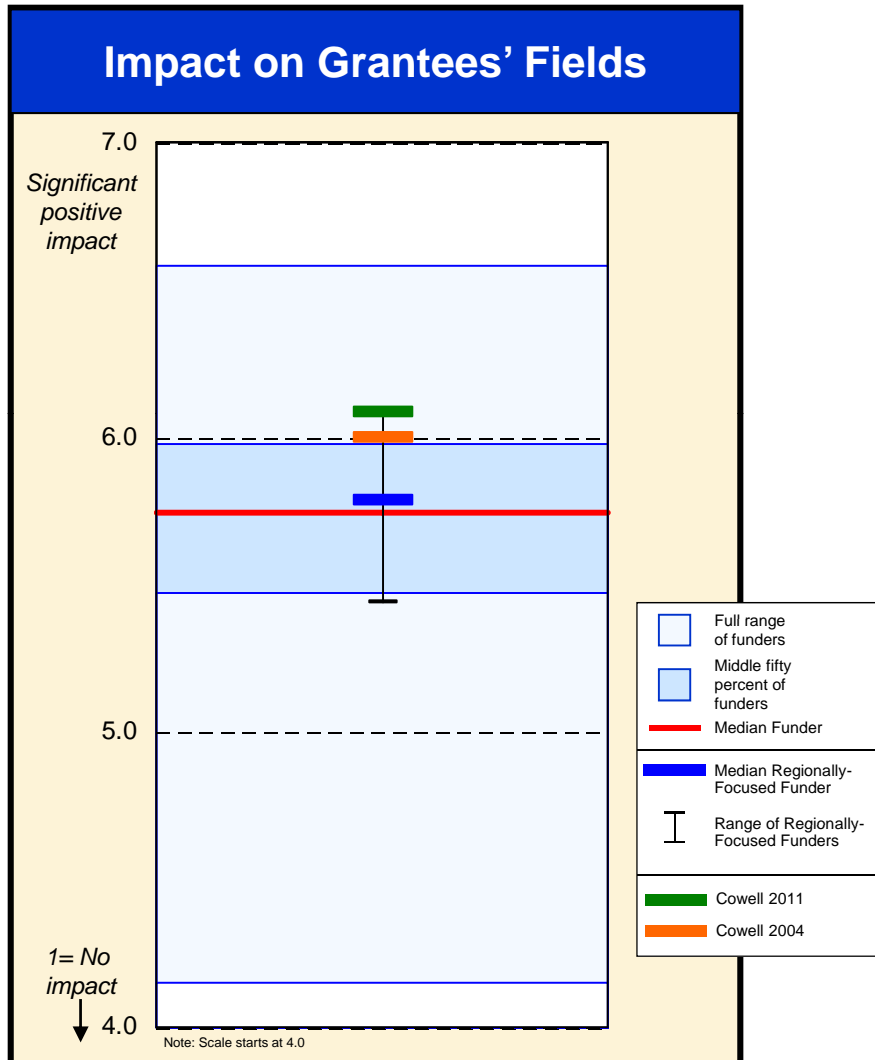
Program Area	Respondents
Affordable Housing	4
Family Resource Center	16
Responsive	4
Education	24
Youth Development	26
Don't Know	6

Methodology – Comparative Data

Full Comparative Set	
Grantee Responses	40,365 grantees
Philanthropic Funders	273 funders

Regionally-Focused Funders	
Clowes Fund	Ruth Mott Foundation
GAR Foundation	S.H. Cowell Foundation
Hyams Foundation	Sobrato Family Foundation
Medina Foundation	The Brinson Foundation
Peter and Elizabeth C. Tower Foundation	William Caspar Graustein Memorial Fund
Raymond Jean Wean Foundation	

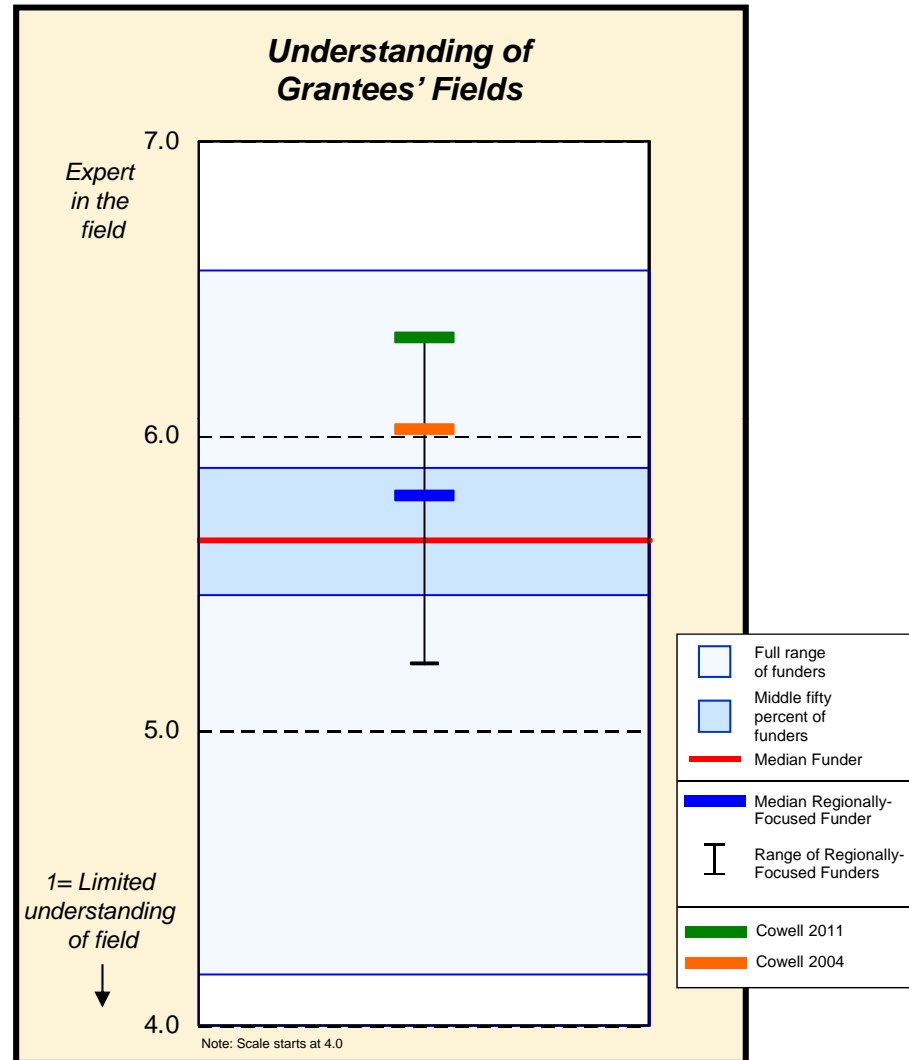
Impact on Grantees' Fields



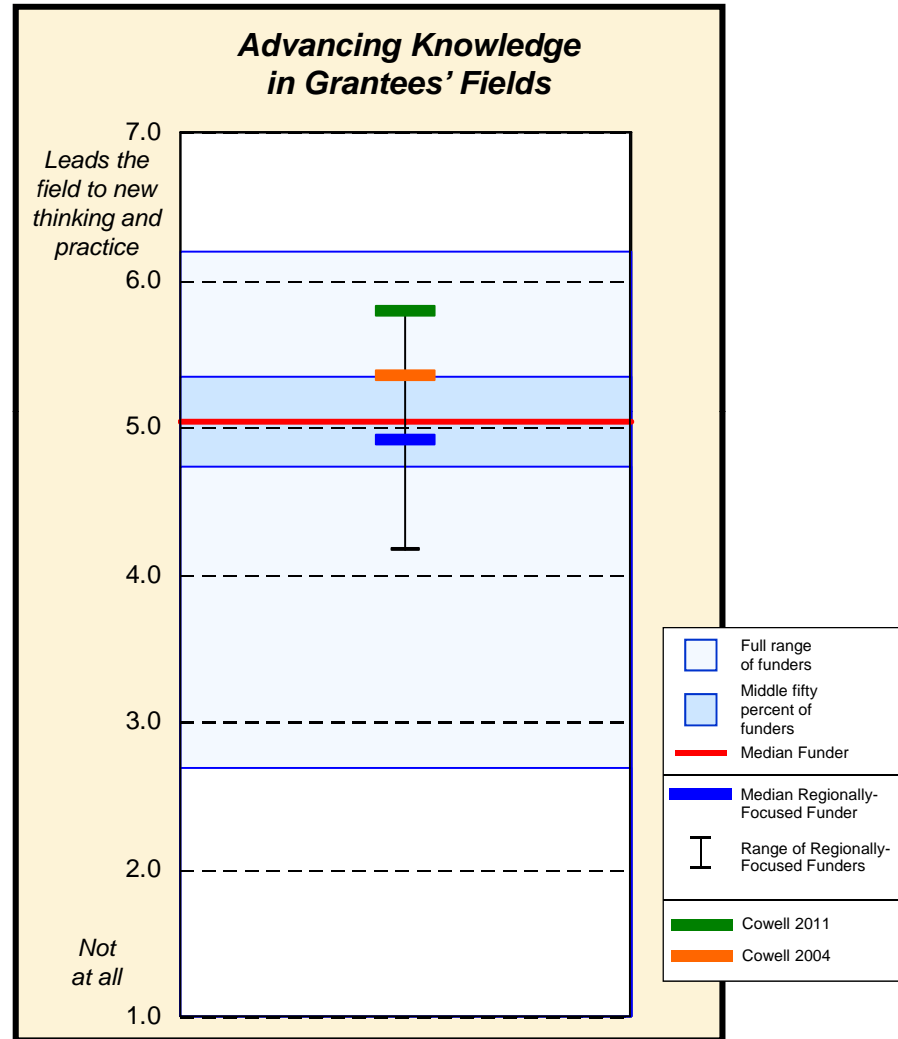
Selected Grantee Comments

- ◆ *“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.”*

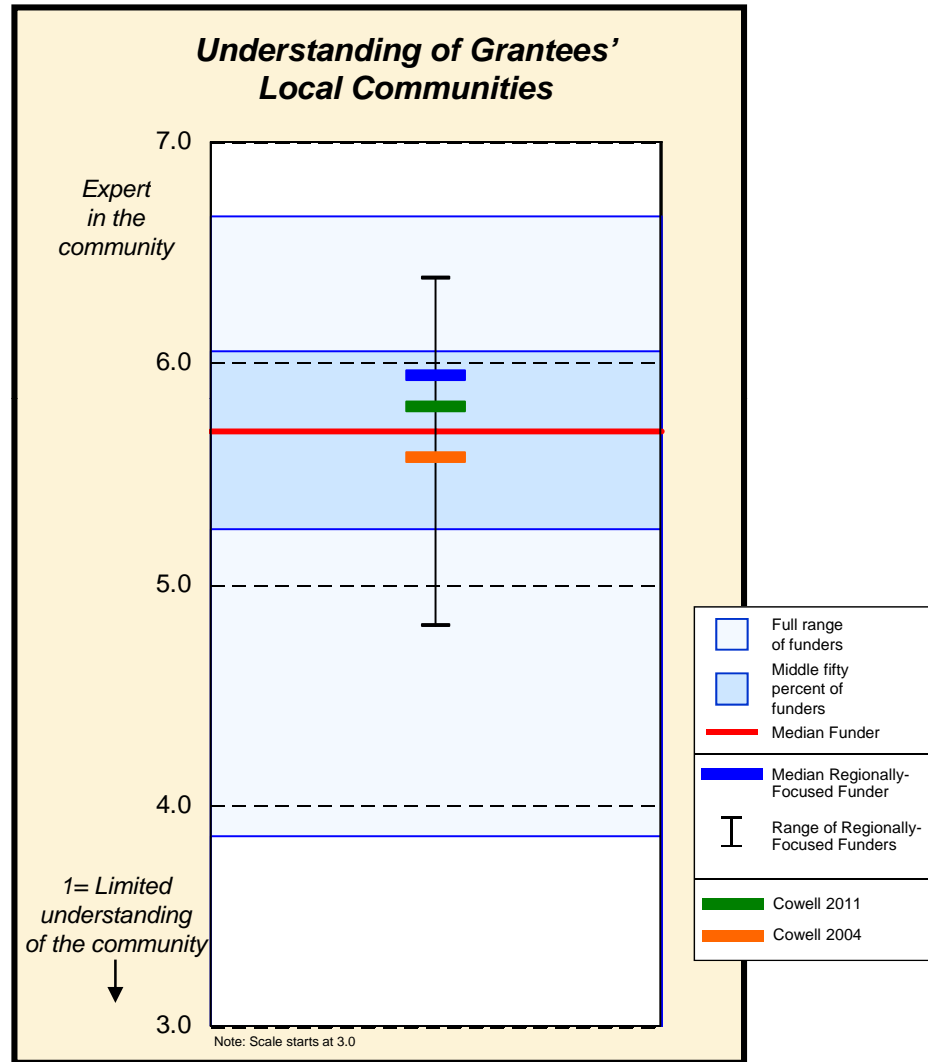
Understanding of Grantees' Fields



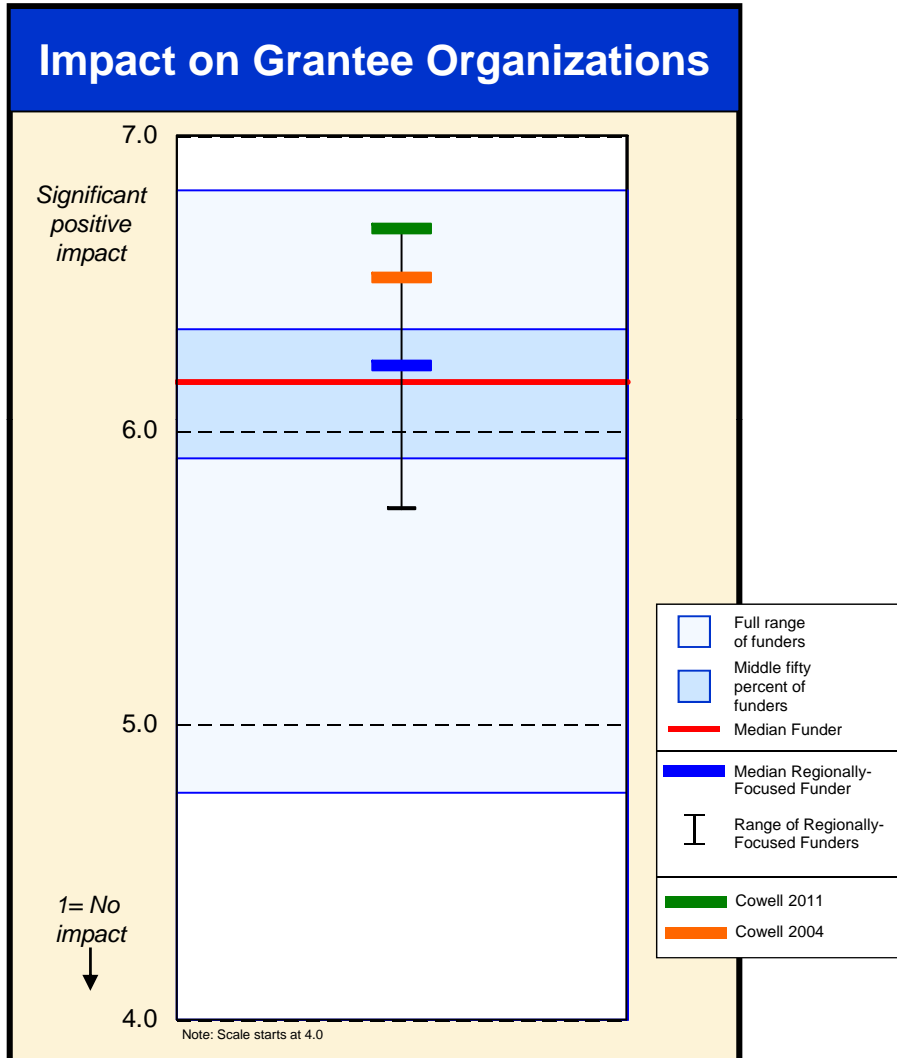
Advancing Knowledge in Fields



Understanding of Grantees' Local Communities



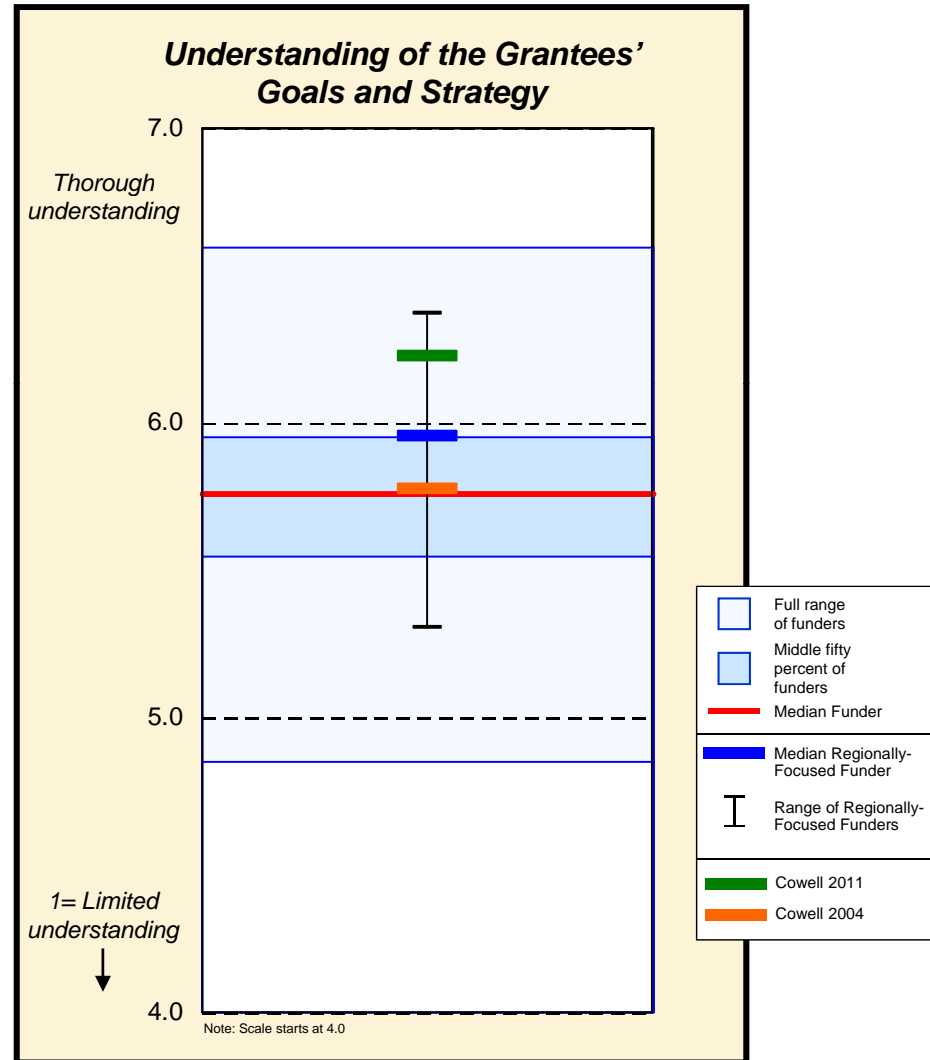
Impact on Grantee Organizations



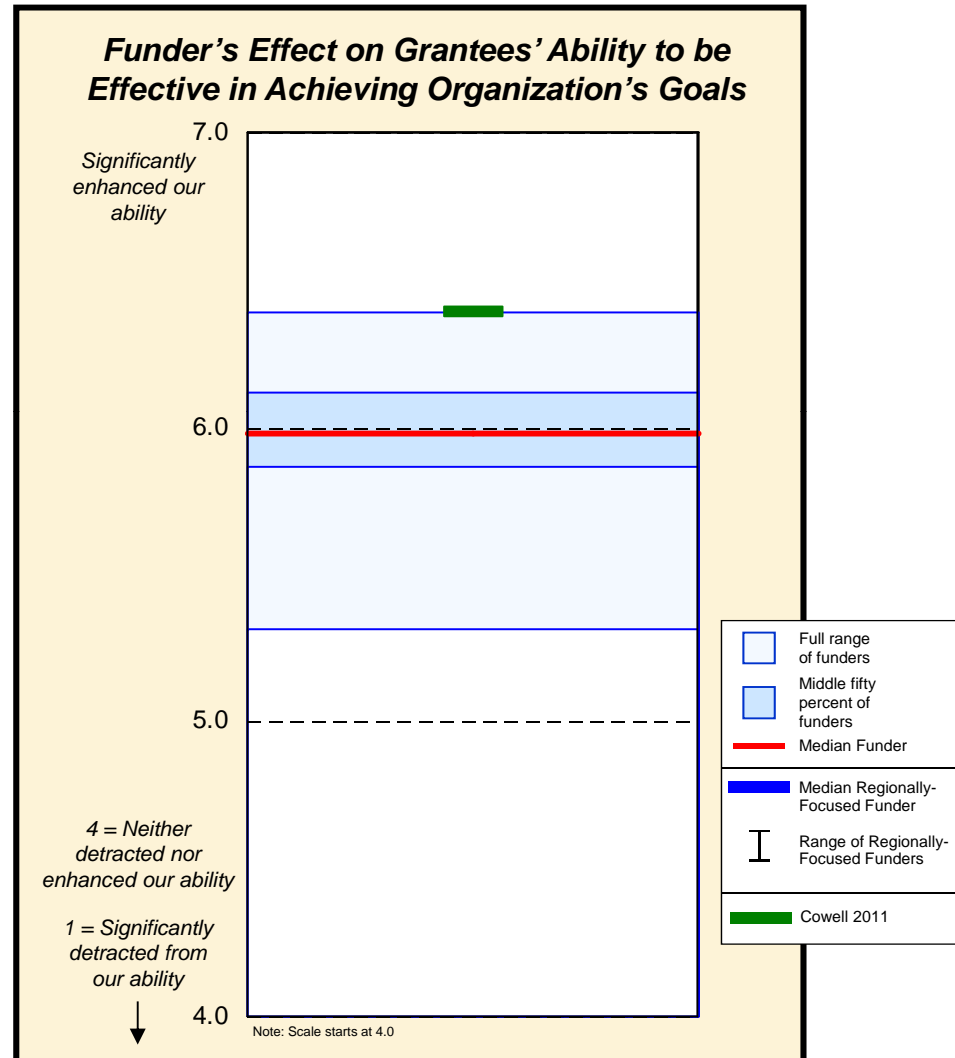
Selected Grantee Comments

- ♦ “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

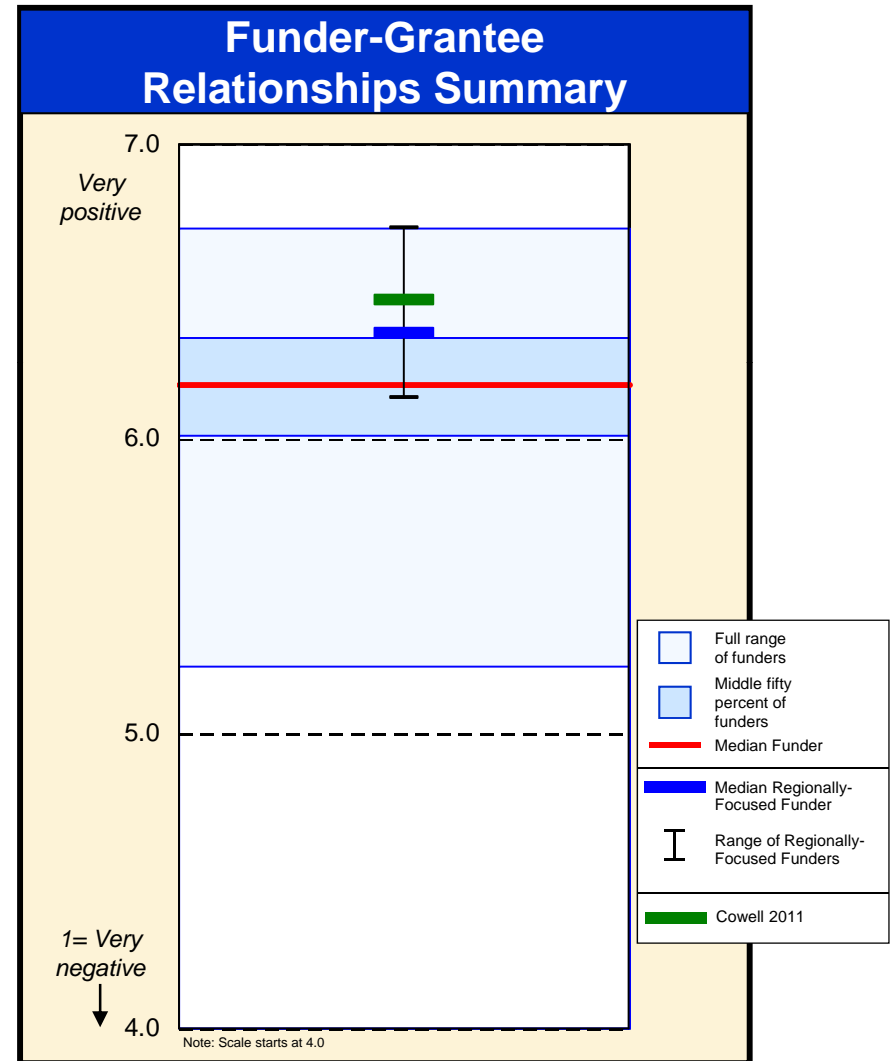
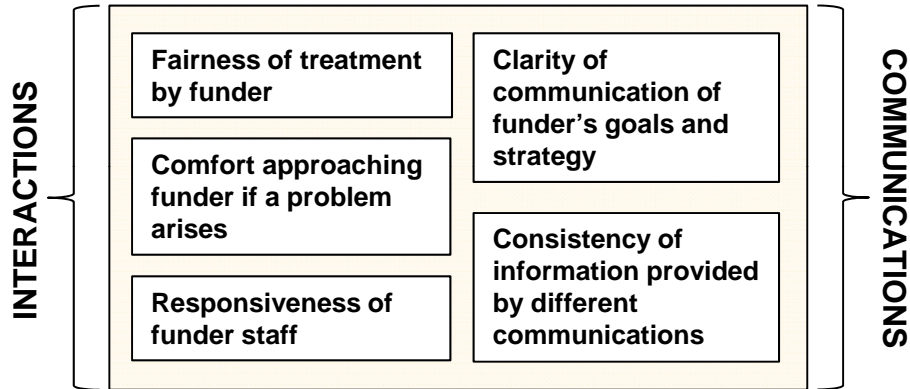


Effect on Grantees Achieving Their Goals

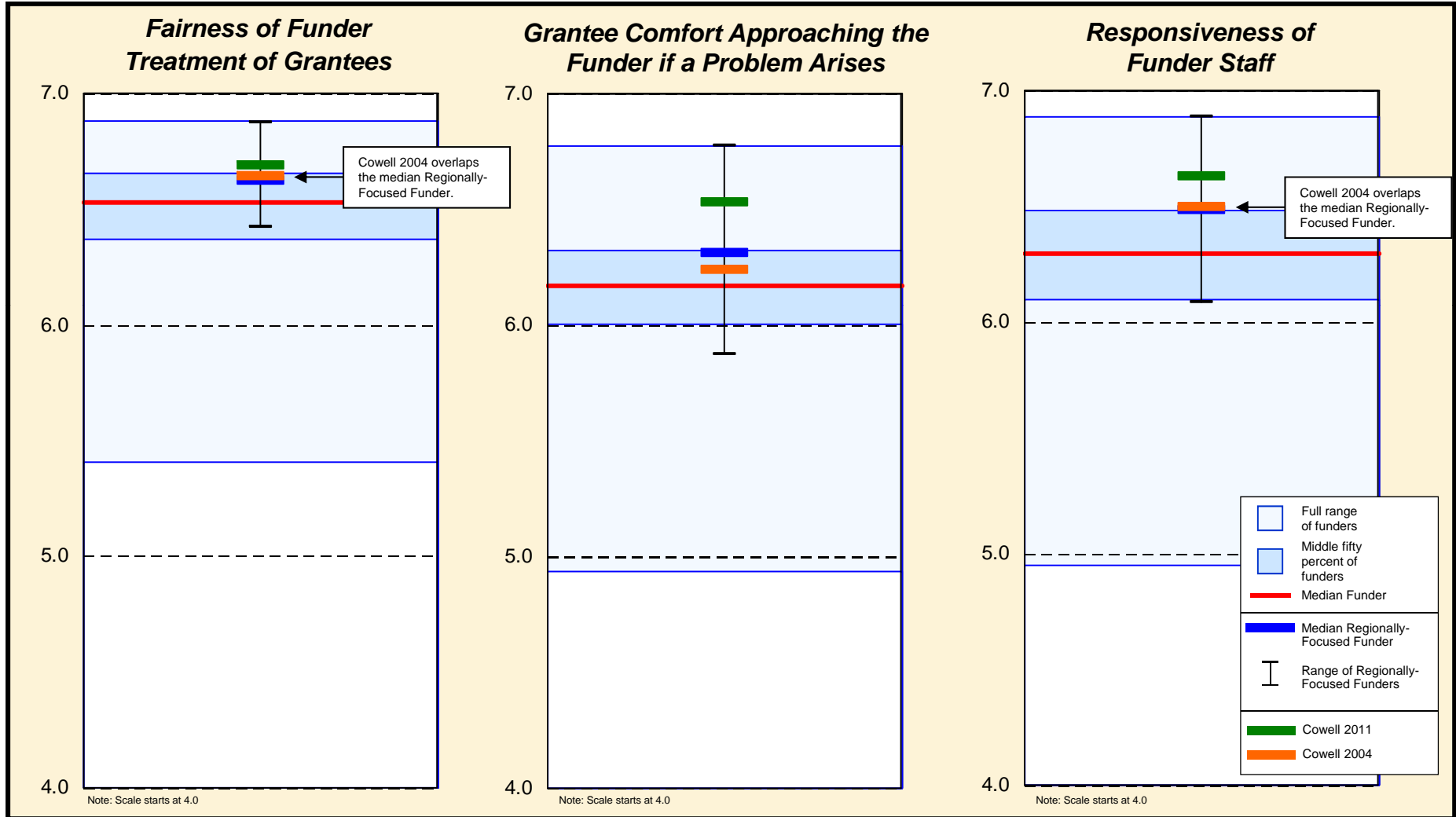


Funder-Grantee Relationships Summary

Key Components of Funder-Grantee Relationships Measure

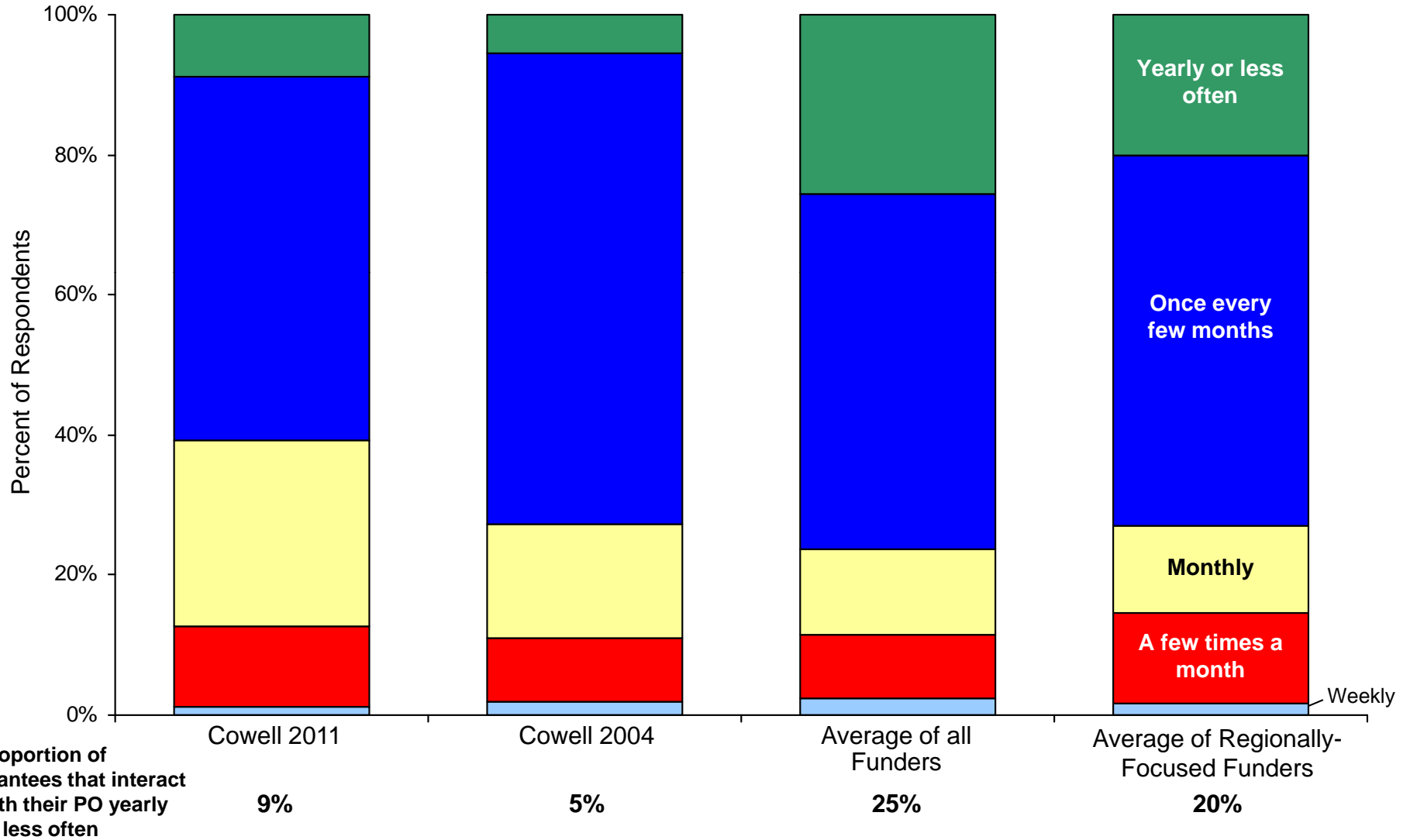


Interactions Measures

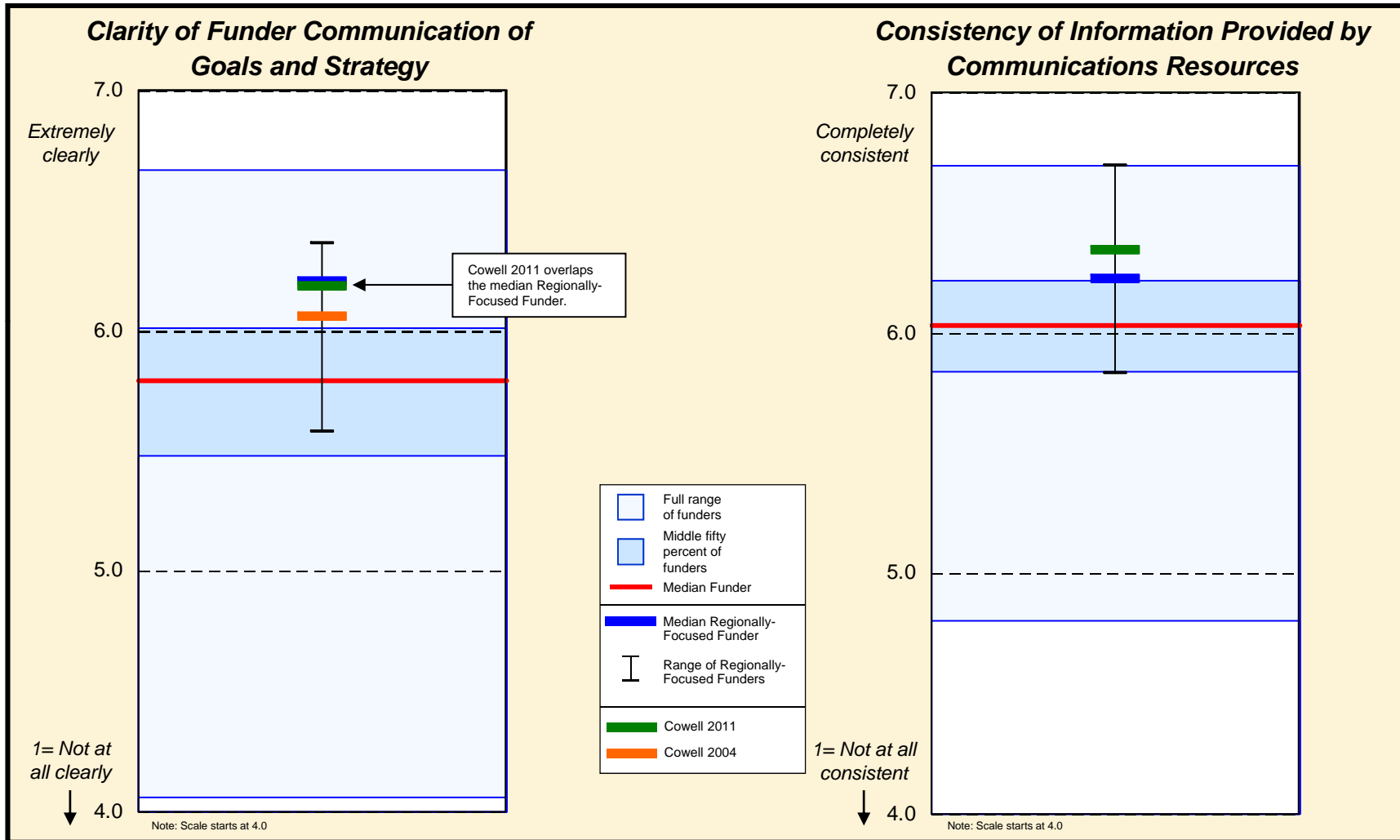


Frequency of Interactions

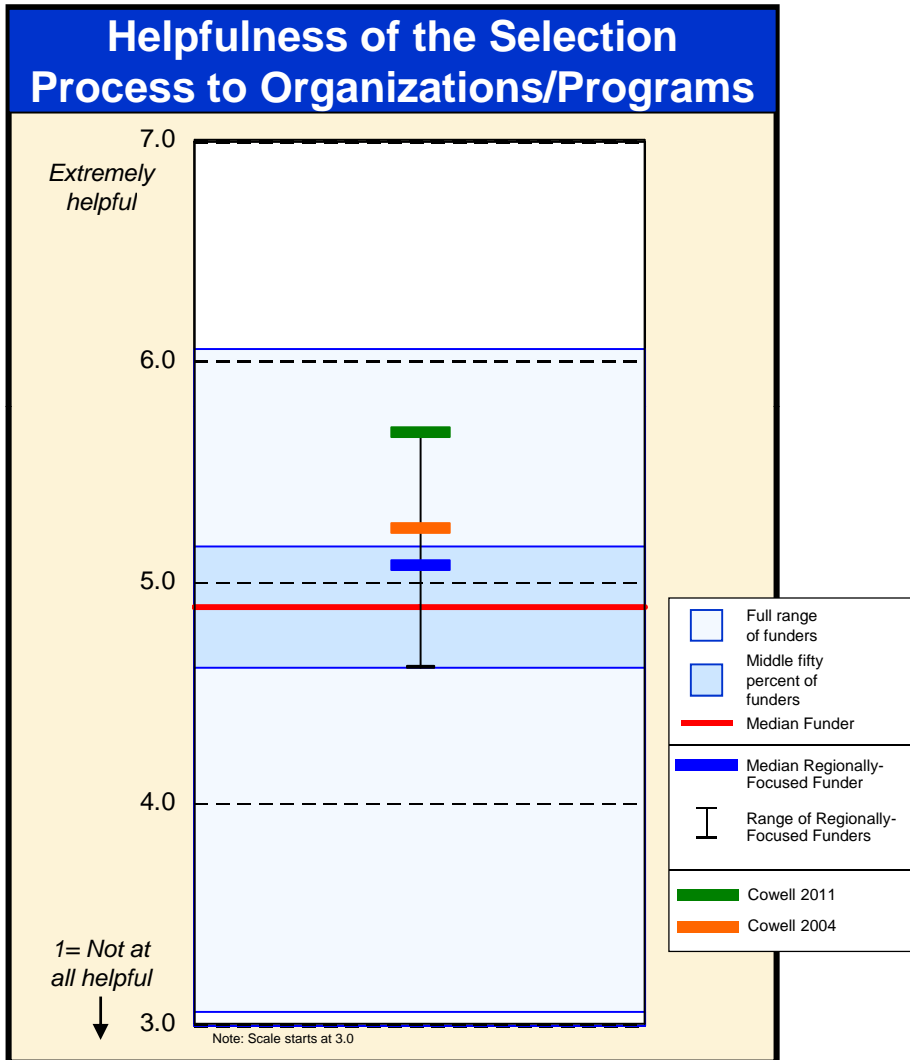
Frequency of Grantee Contact with Program Officer During Grant



Communications Measures



Helpfulness of Selection Process

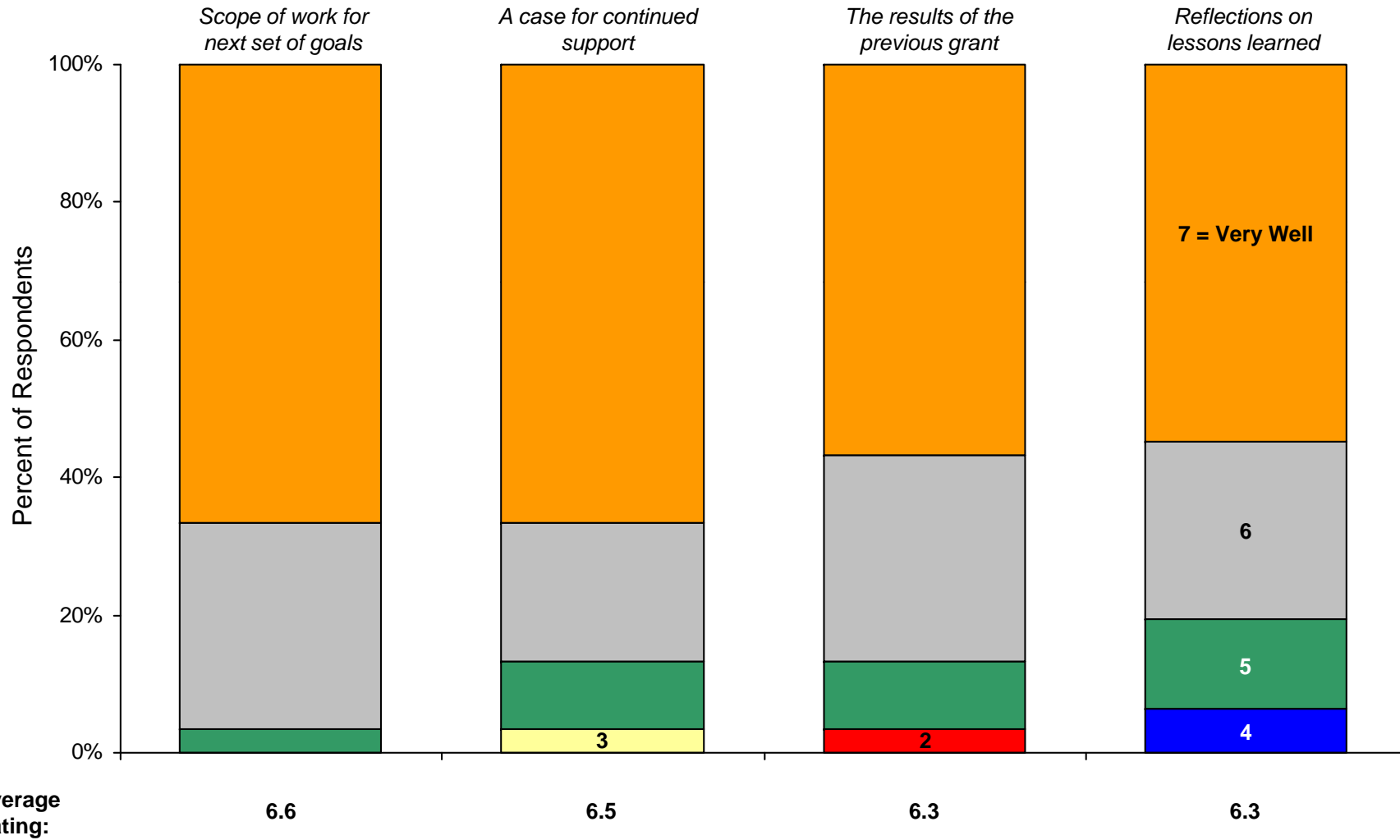


Selected Grantee Comments

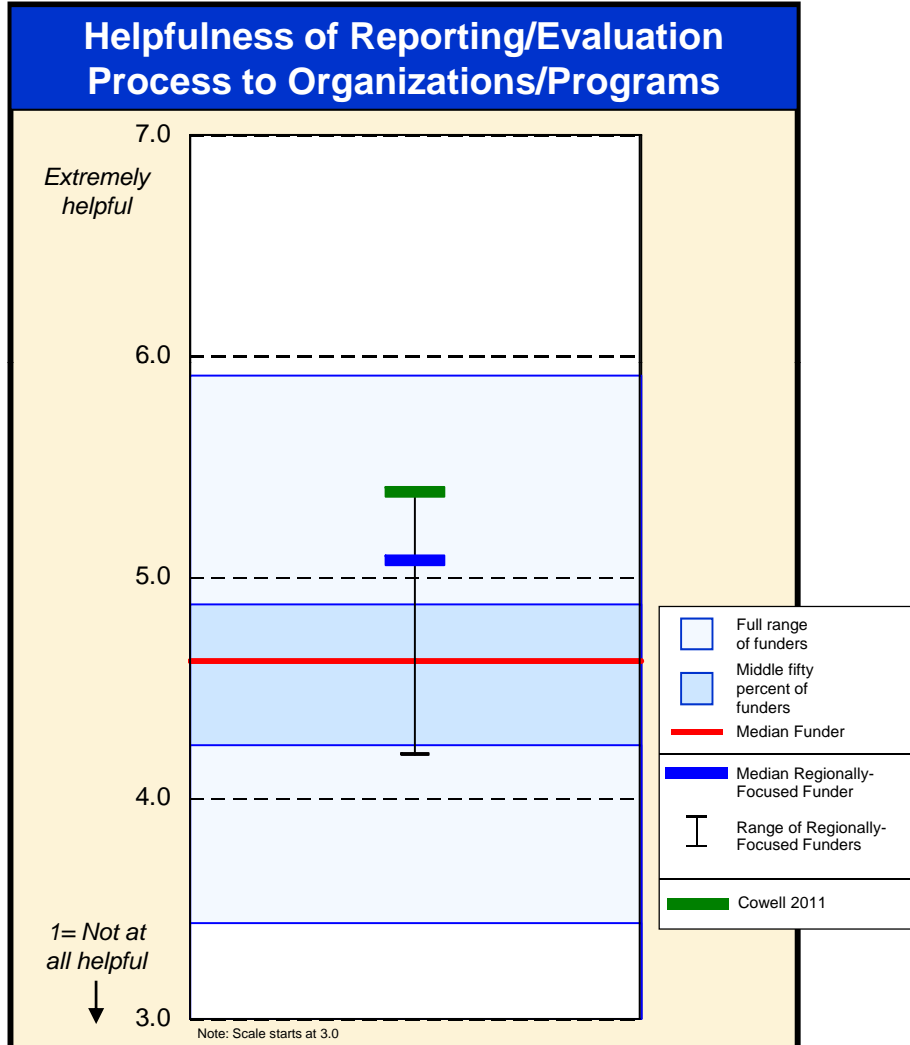
- ◆ *“The [proposal] process was iterative and interactive with Cowell Staff. It was very helpful in putting the proposal together”*
- ◆ *“Regarding the processes used in the selection at times it has seem a bit overwhelming.”*

Updated Foundation Processes

Foundation Characteristics



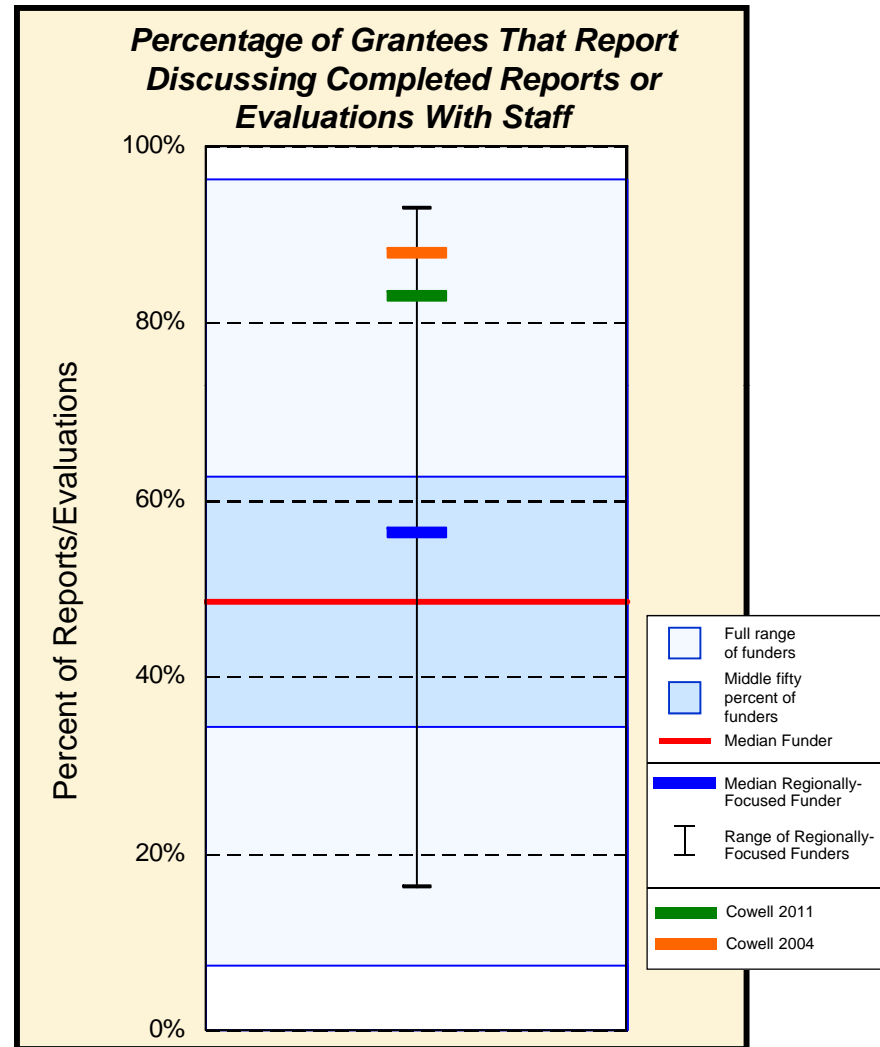
Helpfulness of Reporting and Evaluation Processes



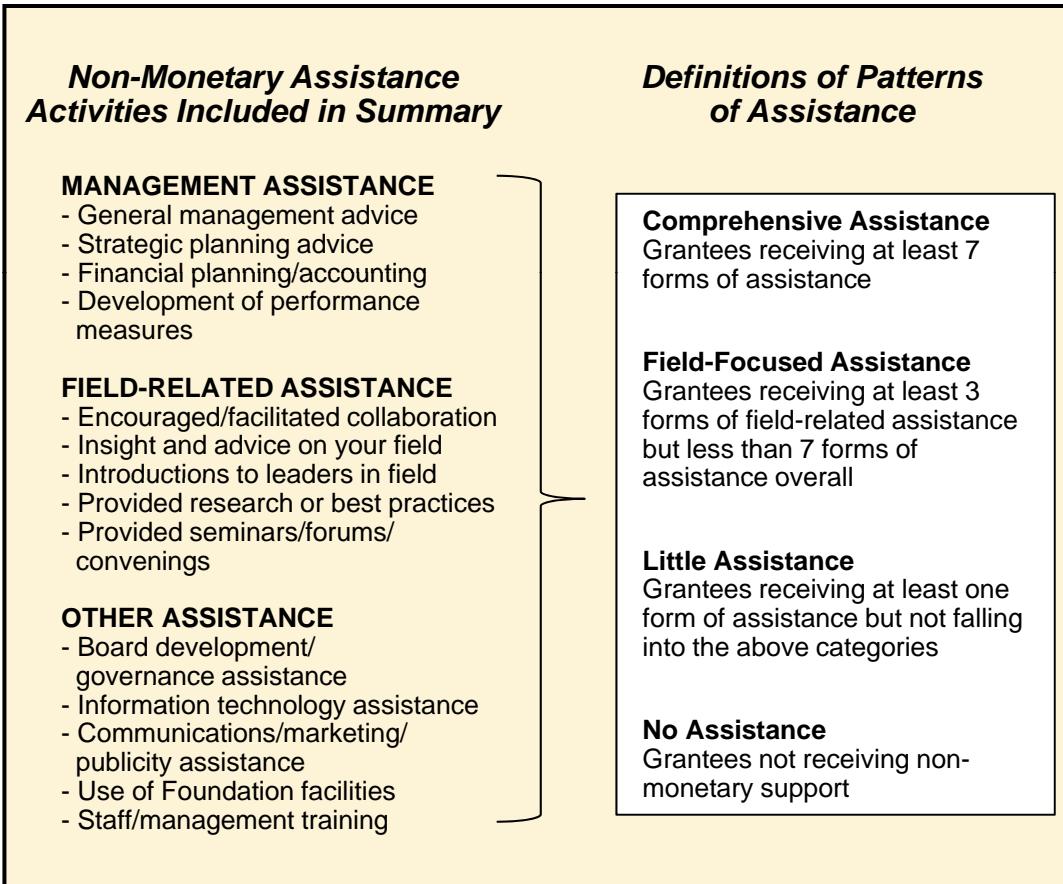
Selected Grantee Comments

- ♦ *“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



Non-Monetary Assistance Summary (1)

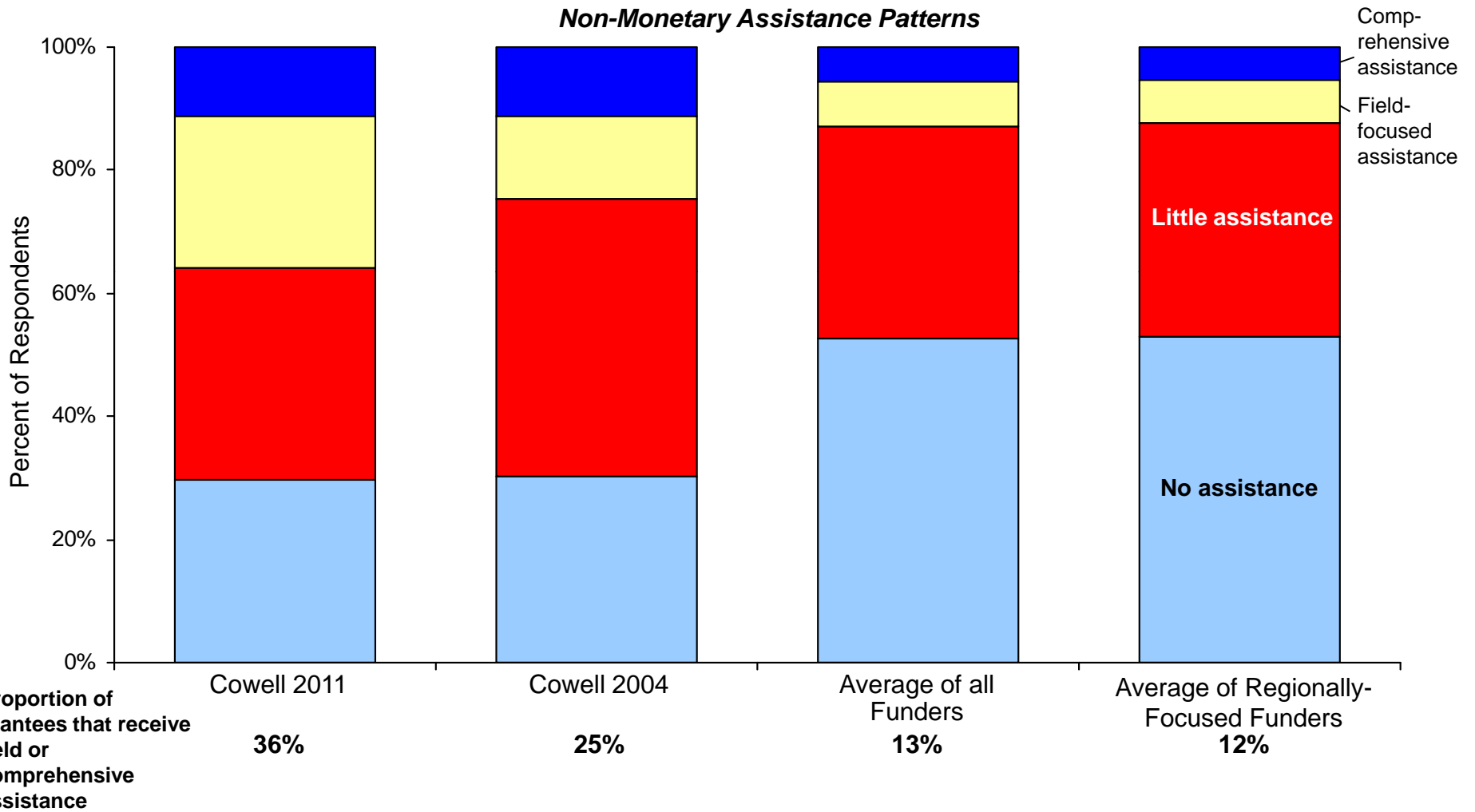


Selected Grantee Comments

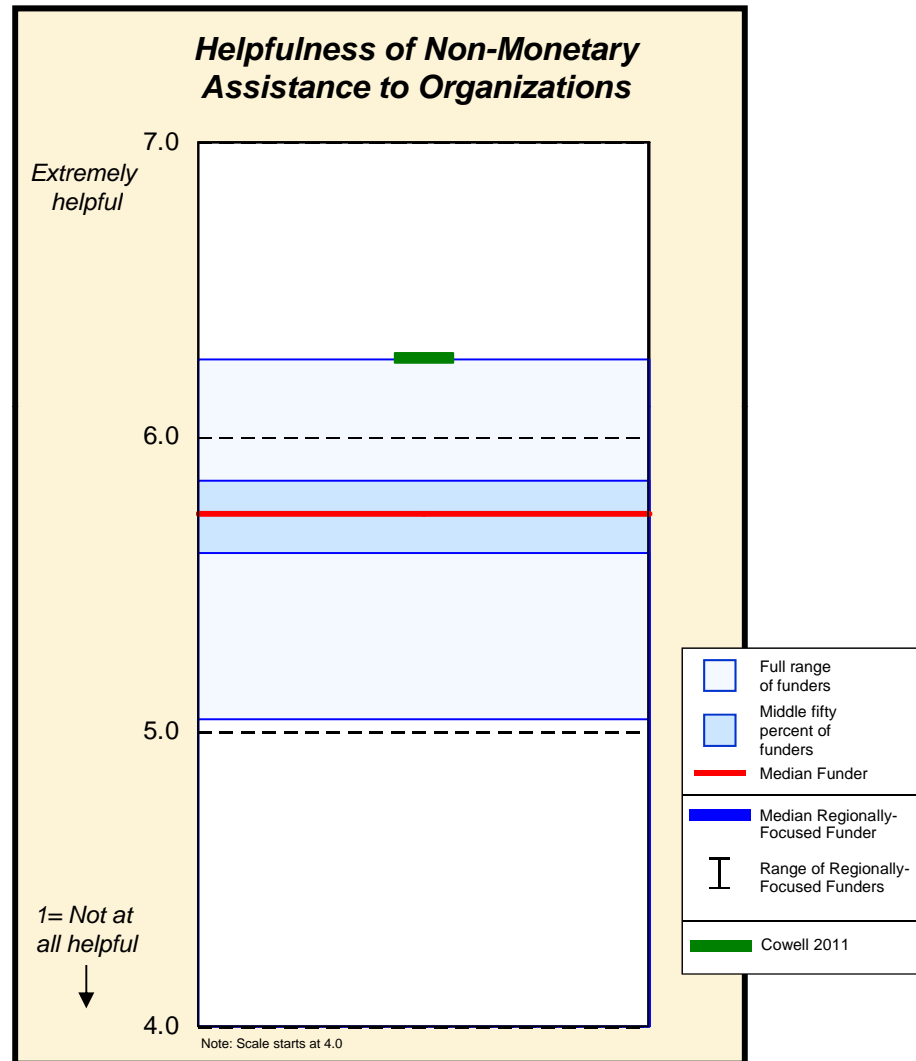
- ◆ *“Their site visits and the Board retreat gave our community partners a place to shine as well.”*
- ◆ *“The Leadership Retreats are a powerful tool for strengthening community and organizational capacity.”*

Non-Monetary Assistance Summary (2)

Non-Monetary Assistance Patterns



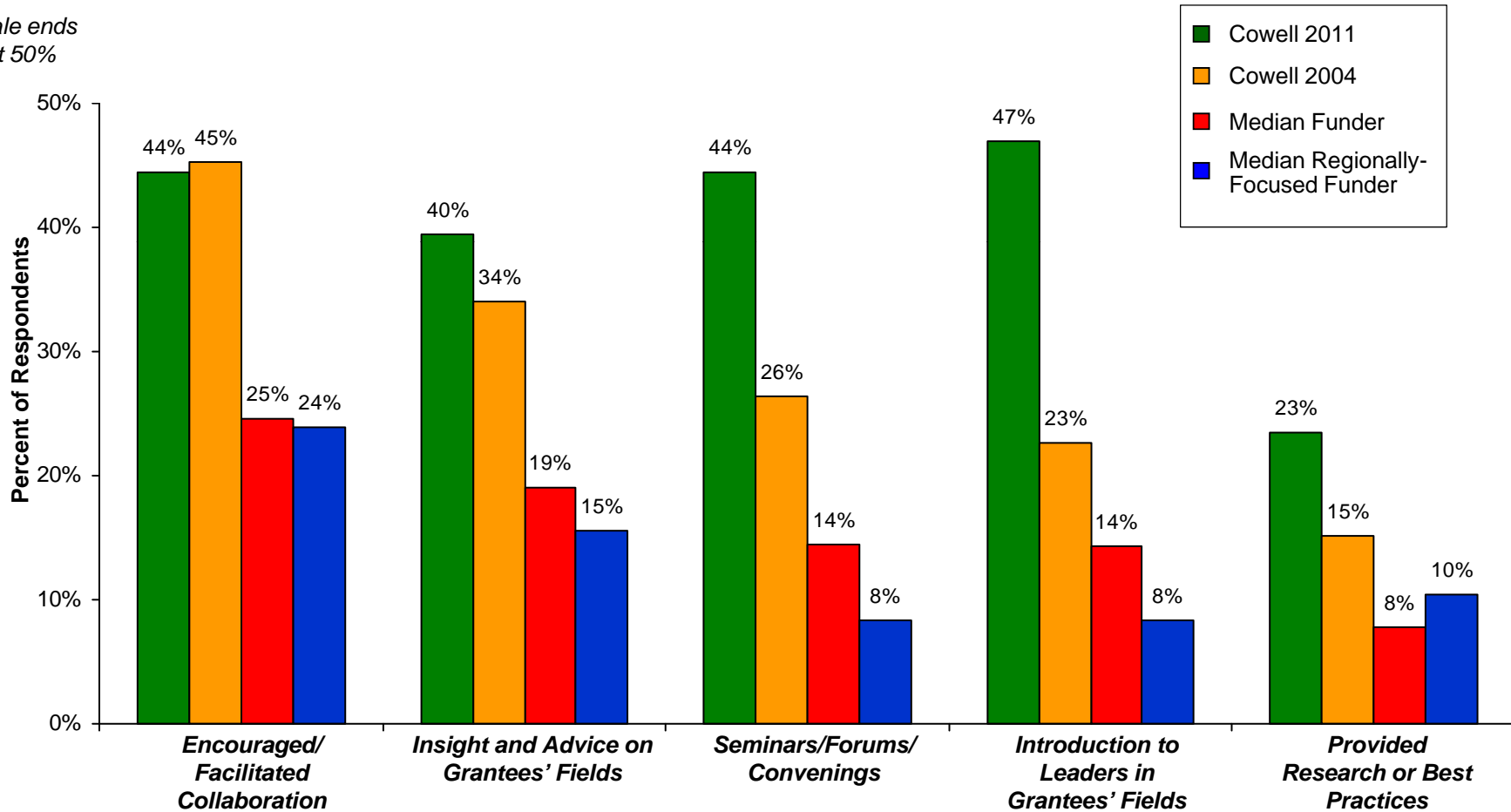
Helpfulness of Non-Monetary Assistance



Field-Related Assistance Activities

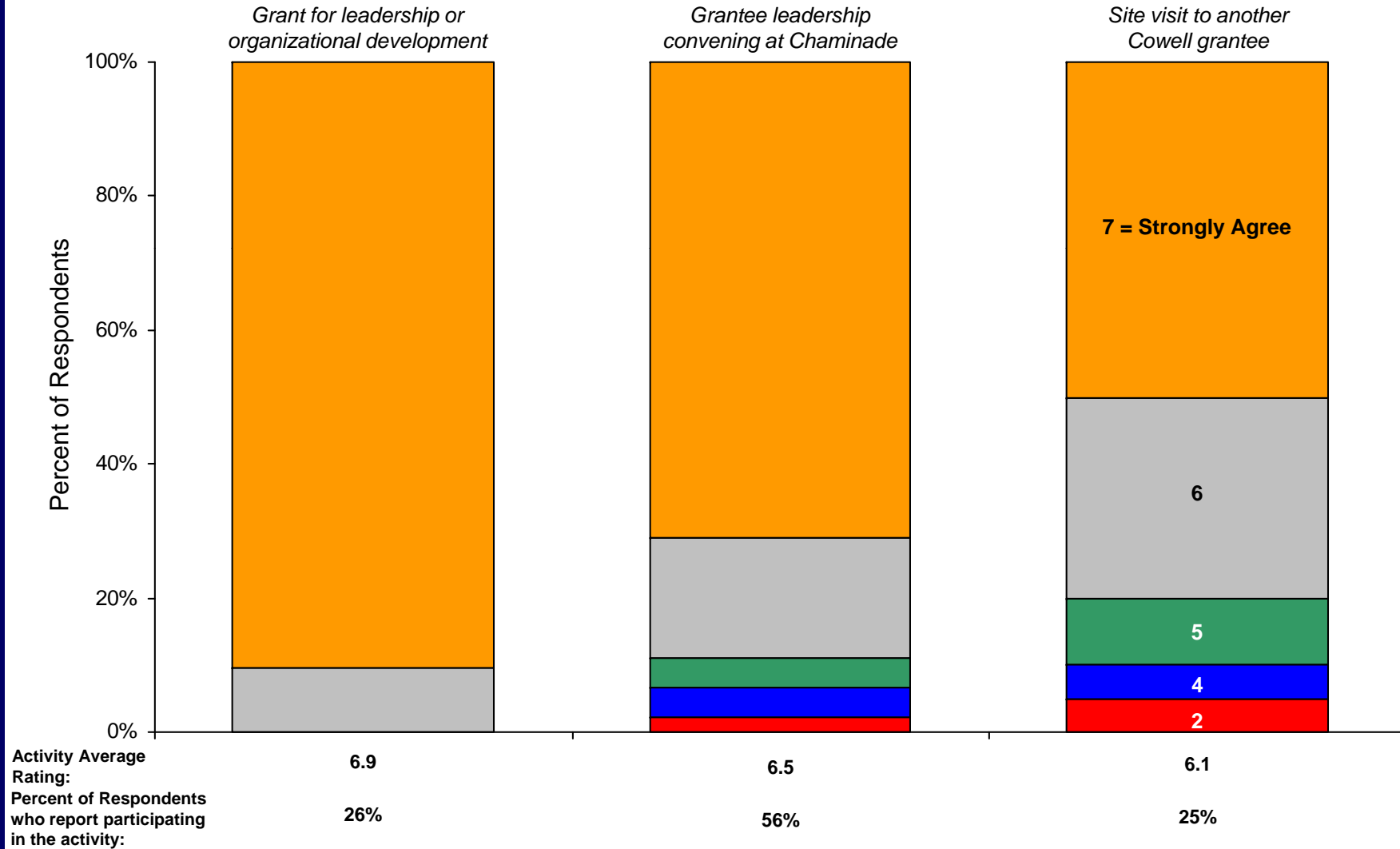
Frequency of Field-Related Assistance Activities

Scale ends at 50%



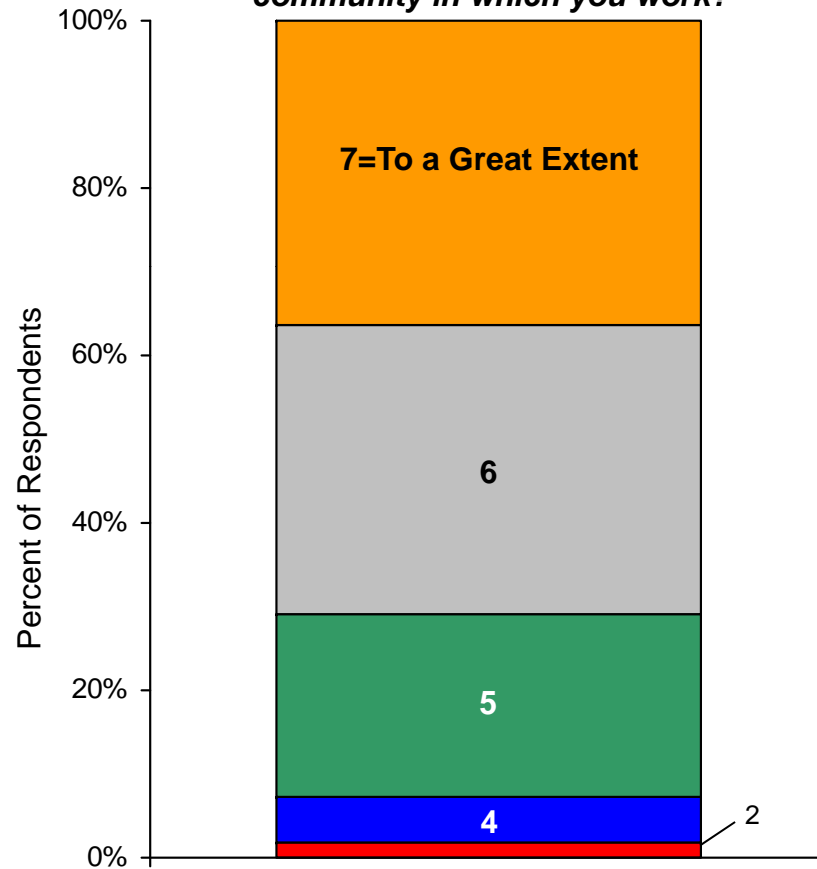
Leadership Development Activities

“This activity helped to deepen my work.”



Collaboration with other Grantees

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



Cowell Average Rating:

6.0

Review of Findings

