

Grantee Perception Report®
and
Applicant Perception Report
prepared for the
MetroWest Community Health Care Foundation
Fall 2007

Excerpt

VERSION 1/22/08



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Methodology (1)

- ◆ The Center for Effective Philanthropy (CEP) has surveyed more than 40,000 grantees of 208 foundations since spring 2003. Please see the Appendix for a list of all foundations whose grantees CEP has surveyed.
- ◆ This Grantee Perception Report® (GPR) contains data collected over the last three years, and includes almost 19,000 grantee responses of 123 foundations.¹
 - CEP surveyed 111 fiscal year 2007 grantees of MetroWest Community Health Care Foundation (“MCHCF”) during September and October 2007. CEP received 73 completed responses, a 66 percent response rate.
 - The average and/or median rating for these respondents is shown throughout this report.
- ◆ This Applicant Perception Report (APR) contains data collected over the last three years, and includes almost 2,300 declined applicant responses.
 - CEP surveyed 47 fiscal year 2007 declined applicants of the MetroWest Community Health Care Foundation (“MCHCF”) during September and October 2007. CEP received 20 completed responses, a 43 percent response rate.
- ◆ Grantees and Applicants submitted responses via mail and the Web.²
- ◆ MCHCF provided grantee contact information.
- ◆ Selected grantee comments are 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 foundation leadership a wide range of perspectives.

1: The average response rate for individual foundations over the last three years of surveys is 67 percent.

2: There are no differences of meaningful magnitude between responses received via the mail or the Web.

Methodology (2)

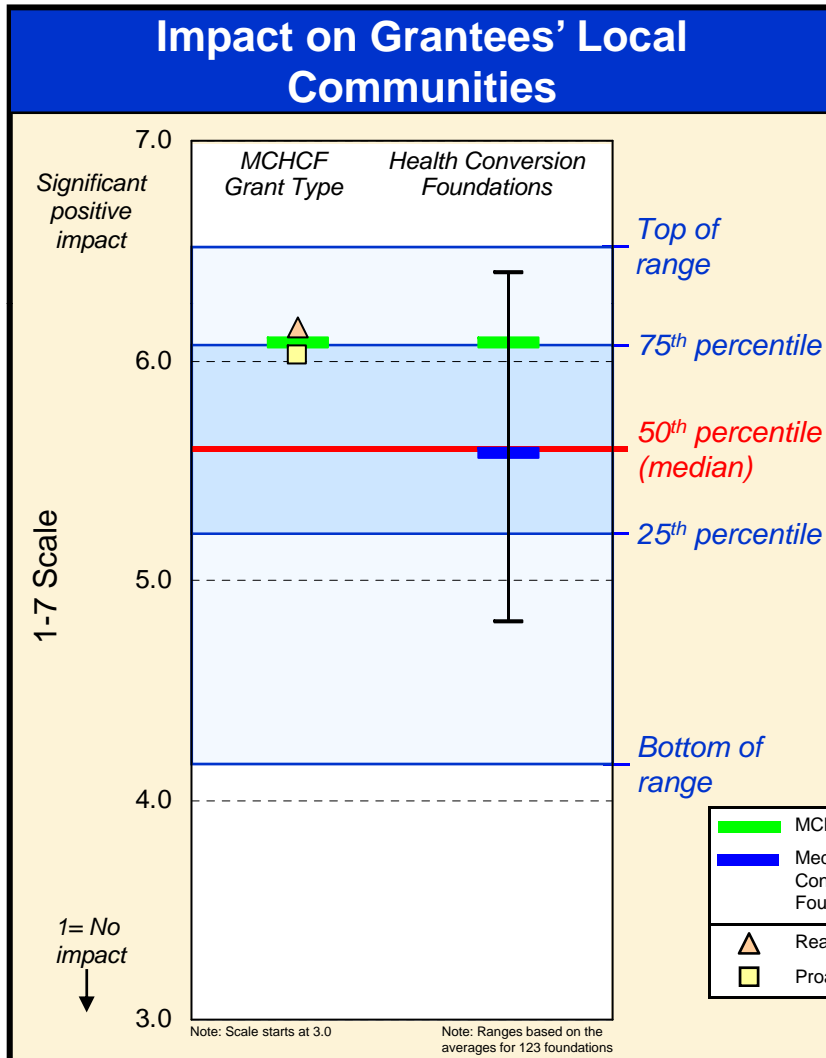
- ◆ Throughout this report, MCHCF average *grantee* ratings are shown segmented by grant type.¹
 - **Proactive** (i.e., Youth Substance Abuse, Childhood Obesity, Racial and Ethnic Health Disparities, Capacity Building, or Capital Grant) – 42 respondents (~74% response rate)
 - **Reactive** (i.e., Improve the Health of MetroWest or Continuation grant) – 29 respondents (~58% response rate)
 - 2 respondents did not indicate their grant type. Their individual average ratings are not shown in this segmentation, but are included in MCHCF’s overall average.

- ◆ MCHCF is also compared to a cohort of health conversion foundations. The 12 foundations that comprise this group are:
 - The Assisi Foundation of Memphis
 - Colorado Trust
 - Connecticut Health Foundation
 - Endowment for Health
 - The Harvest Foundation
 - Kansas Health Foundation
 - MetroWest Community Health Care Foundation
 - Michael Reese Health Trust
 - Missouri Foundation for Health
 - New York State Health Foundation
 - Northwest Health Foundation
 - Winter Park Health Foundation

Impact on Grantees' Local Communities

On impact on grantees' local communities, MCHCF is rated:

- above the median foundation
- above the median health conversion foundation



Selected Grantee Comments

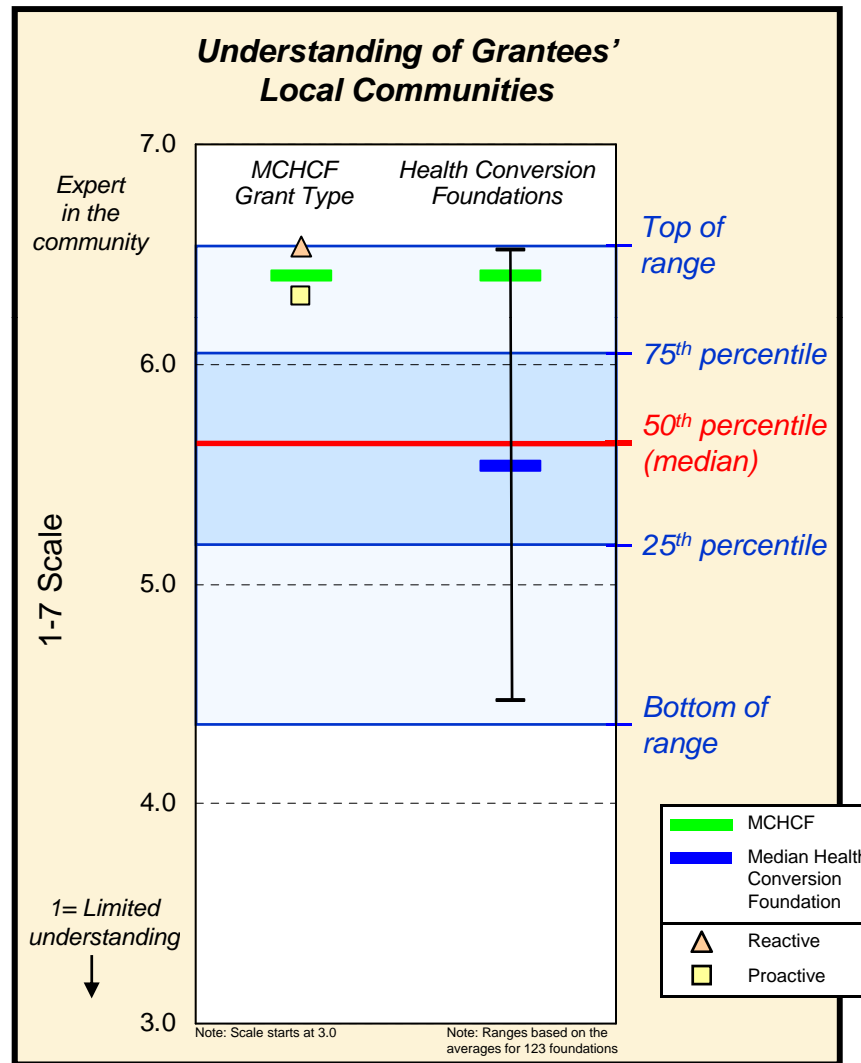
- ♦ *"The Foundation has introduced an objective, [political] approach to meeting health needs of the metrowest area. It follows scientifically validated approaches. It is progressive, willing to challenge assumptions, and willing to shake things up."*
- ♦ *"The Foundation has a terrific impact on our community because it has the resources and ability to have a direct impact by what it funds and with their own initiatives. They are invested in community health care improvement and are willing to invest their money where they see a need."*
- ♦ *"The Foundation is a leader among non-profits, fostering collaborative relationships, and bringing forward-thinking practices in health to MetroWest."*
- ♦ *"Foundation has been an important, strong, visible, effective presence in the metrowest region and has stimulated debate and raised awareness regarding health and health care issues."*

"MCHCF has been the major convener for community coalitions and efforts to decrease disparities in health care, combat youth obesity, start community health programs and other important initiatives."

Understanding of Grantees' Local Communities

On understanding of grantees' local communities, MCHCF is rated:

- higher than ninety percent of surveyed foundations
- above the median health conversion foundation

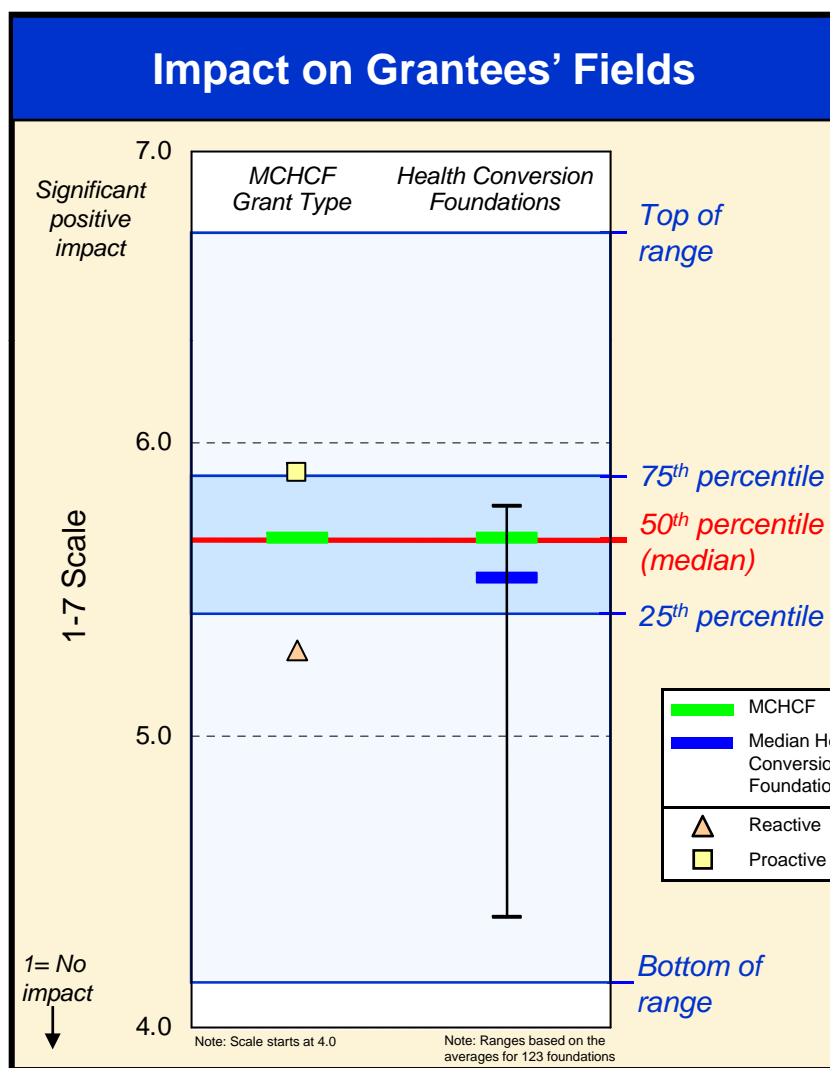


Note: This question includes a "don't know" response option; 7 percent of MCHCF respondents answered "don't know," compared to 14 percent at the median foundation and 9 percent at the median health conversion foundation.

Impact on Grantees' Fields

On impact on grantees' fields, MCHCF is rated:

- similarly to the median foundation
- similarly to the median health conversion foundation



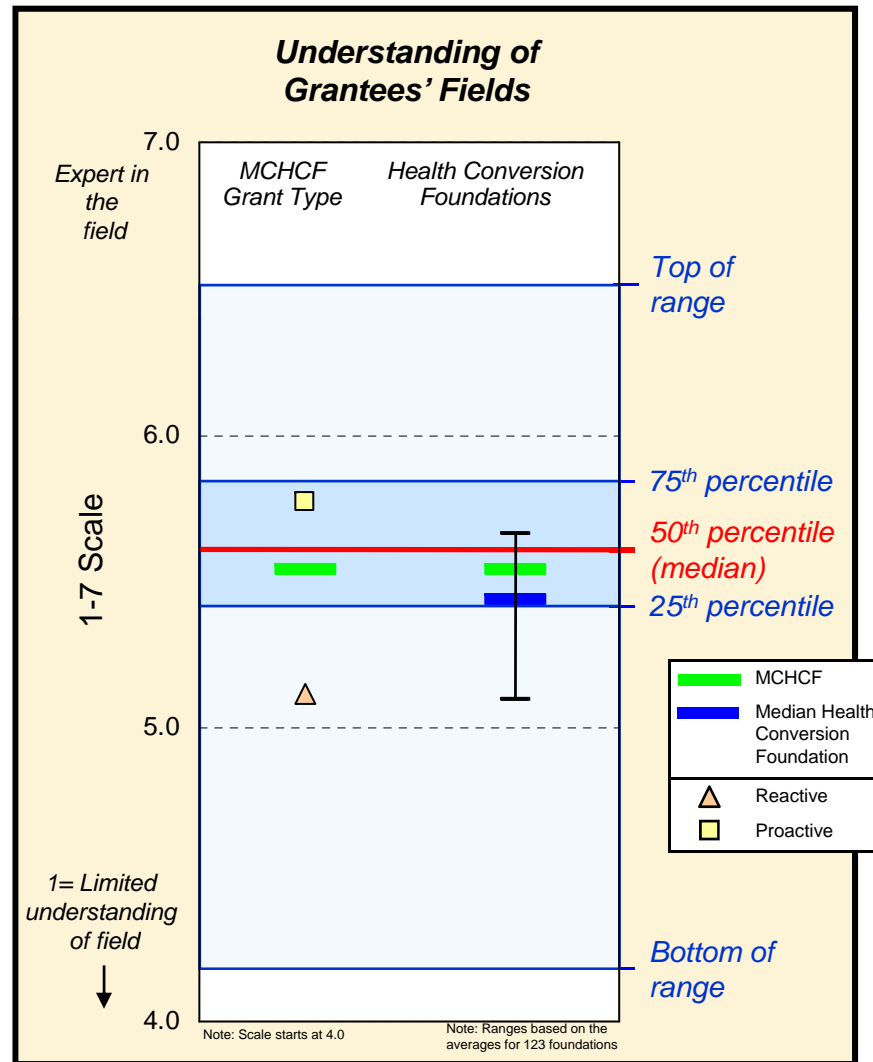
Selected Grantee Comments

- ♦ “The Foundation currently plays an active and prominent role in educating our youth regarding fitness, healthy eating, and healthy habits. They are viewed as a leader in this increasingly important area.”
- ♦ “The Foundation has made a significant impact on the field of substance abuse by funding innovative programming and working hard to remove the stigma attached to addiction.”
- ♦ “The Foundation has opened up the eyes of many parents/children/teachers/staff to the problems with obesity, nutrition, activity for children, [and] exercise. More people are realizing the importance of paying attention to what we eat/drink.”
- ♦ “I’m not sure if family support or infant to 5 years are really on their day-to-day ‘scope’.”
- ♦ “‘The field’ is a very broad area – encompassing concerns for low-income and elderly persons with several specialties. Some grants have helped many consumers, while others may also shape policy.”

Understanding of Grantees' Fields

On understanding of grantees' fields, MCHCF is rated:

- similarly to the median foundation
- above the median health conversion foundation

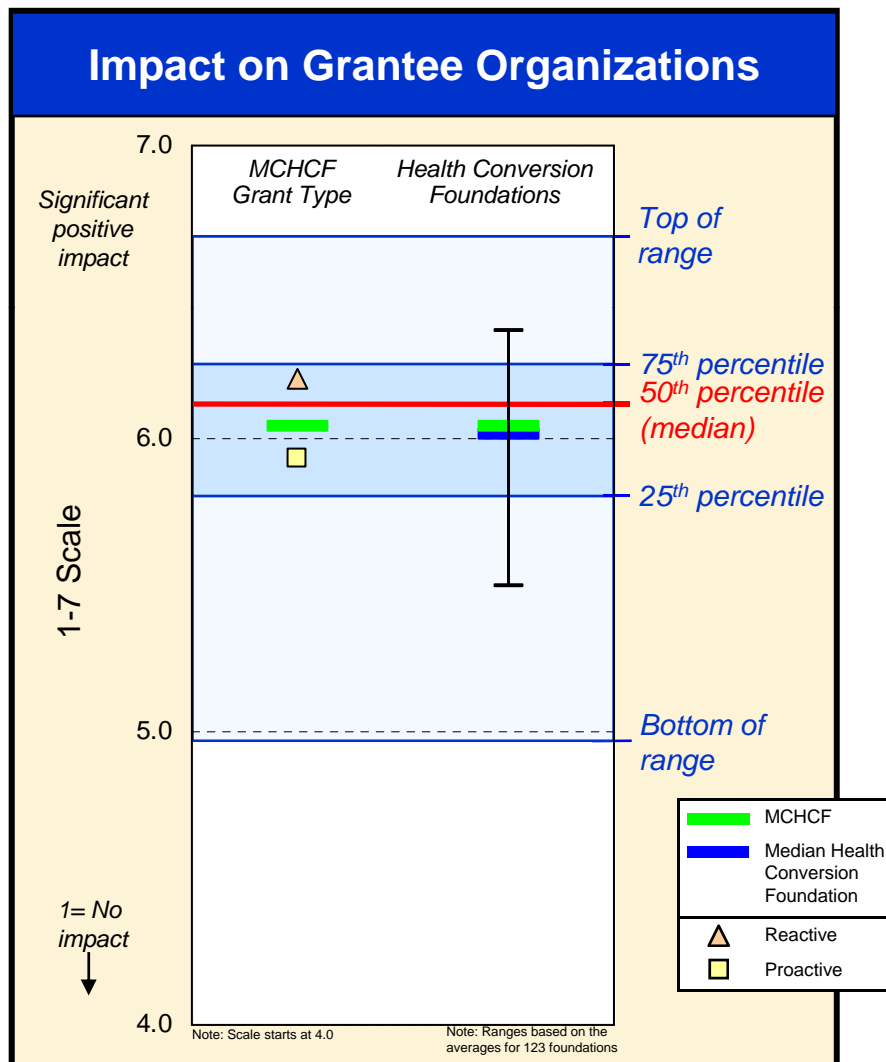


Note: This question includes a "don't know" response option; 6 percent of MCHCF respondents answered "don't know," compared to 8 percent at the median foundation and 7 percent at the median health conversion foundation.

Impact on Grantee Organizations

On impact on grantee organizations, MCHCF is rated:

- similarly to the median foundation
- similarly to the median health conversion foundation



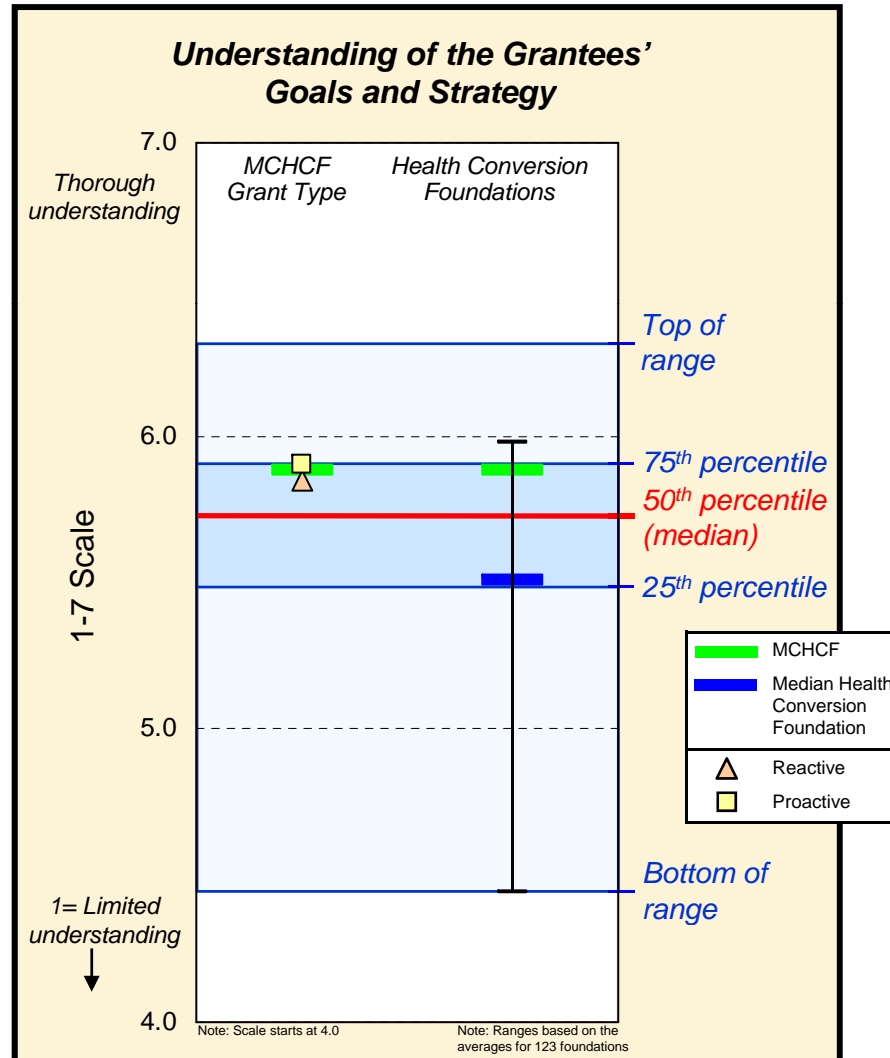
Selected Grantee Comments

- ♦ *“The Foundation has been extremely supportive and has enabled [the organization] to have a successful program. They have been instrumental in making the program more effective and have been an outstanding resource.”*
- ♦ *“The challenge will be to continue the program once the funding runs out. The validation of the program by the financial support of the Foundation is immeasurable.”*
- ♦ *“The Foundation has had a vital impact on our organization, through significant funding of innovative programs that have had a very positive influence on quality of life and health for our patients. Staff and volunteers (of the Foundation) have been staunch supporters of our mission and have given time and talent on our behalf.”*
- ♦ *“Besides meeting once with the Foundation staff, I felt that they took more of an interest in data and hard numbers than the actual program we ran. [Our work] is quite difficult to quantify and qualitative data provides a much richer picture. I felt the Foundation had little interest in this aspect.”*

Understanding of Grantees' Goals and Strategy

On understanding of grantees' goals and strategies, MCHCF is rated:

- above the median foundation
- above the median health conversion foundation

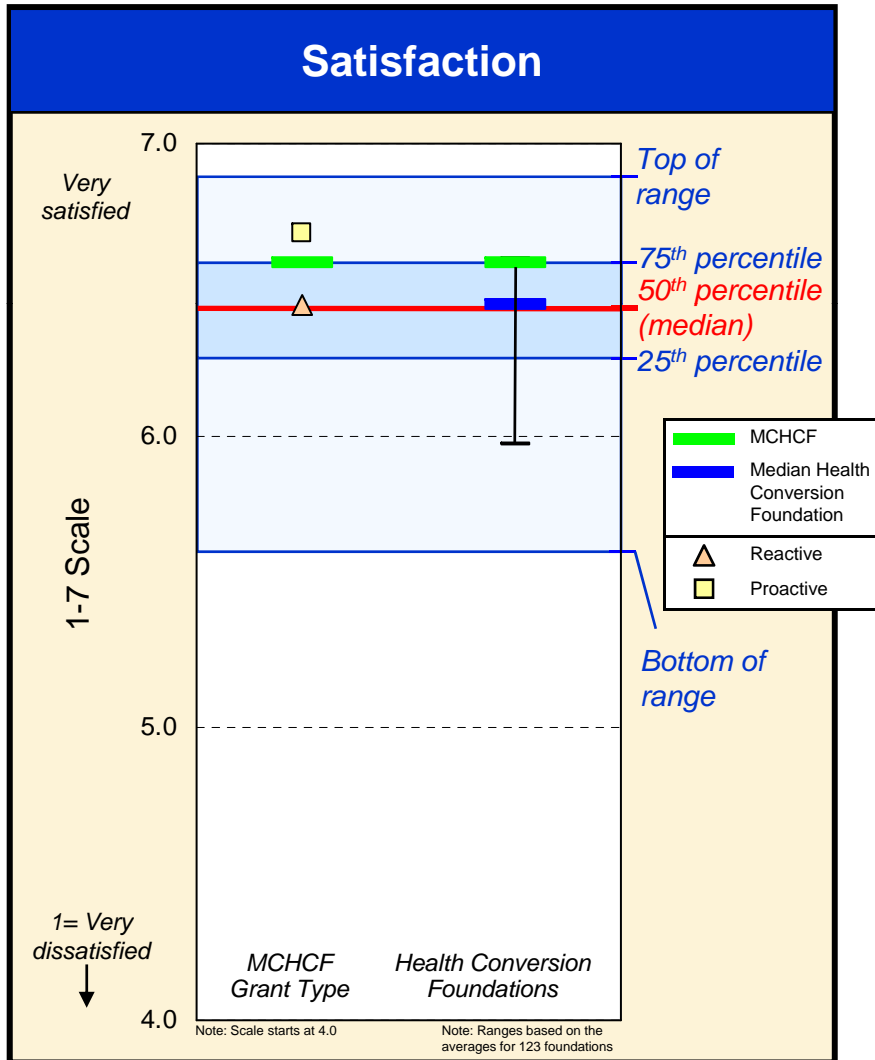


Note: This question includes a "don't know" response option; 6 percent of MCHCF respondents answered "don't know," compared to 8 percent at the median foundation and 7 percent at the median health conversion foundation.

Satisfaction

On overall satisfaction, MCHCF is rated:

- above the median foundation
- above the median health conversion foundation



Selected Grantee Comments

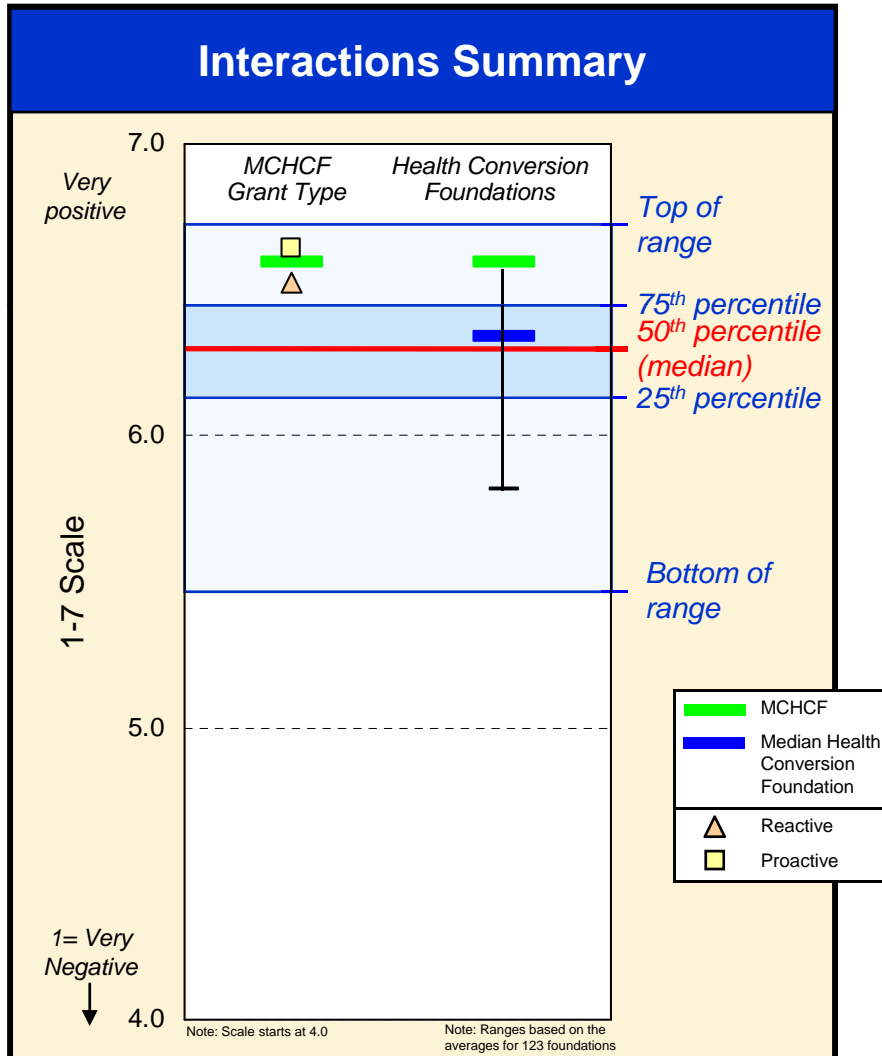
- ♦ “I find the Foundation’s operations, processes, interactions, and communications to be organized, professional, responsive, and highly effective.”
- ♦ “I find, having been connected to the Foundation for [many] years, that it is the most professional, caring, proactive and generous organization I have ever had the privilege of knowing!”
- ♦ “Since our grant amount is so little (in comparison to other programs), I felt as if we didn’t get that much attention but that wasn’t a problem since I felt the program was going along fine and assumed staff felt the same way.”
- ♦ “I believe the Foundation is always striving to be better even though their services are already of the highest quality.”

Survey-Wide Analysis Fact: Three dimensions best predict grantee perceptions of satisfaction with their foundation funders: 1) *Quality of Interactions with Foundation Staff:* fairness, responsiveness, approachability; 2) *Clarity of Communication of a Foundation’s Goals and Strategy:* clear and consistent articulation of objectives; 3) *Expertise and External Orientation of the Foundation:* understanding of fields and communities of funding and ability to advance knowledge and affect public policy. For more on these findings and resulting management implications, please see CEP’s report, *Listening to Grantees: What Nonprofits Value in Their Foundation Funders.*

Grantee Interactions Summary

On this summary that includes grantees' comfort approaching the Foundation if a problem arises, responsiveness of Foundation staff, and fairness of the Foundation's treatment of grantees MCHCF is rated:

- higher than ninety percent of surveyed foundations
- higher than all other health conversion foundations



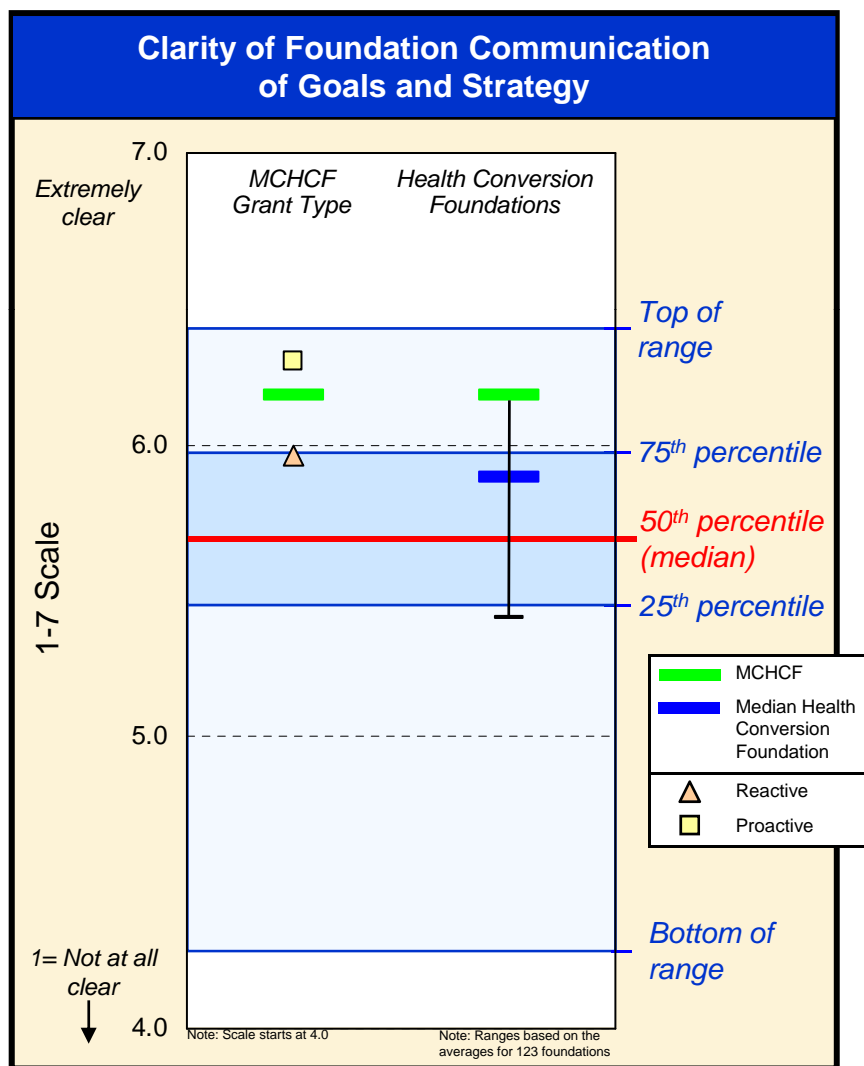
Selected Grantee Comments

- ♦ *"The staff is terrific to work with – helpful, creative and responsive. They are really partners in this work. We trust and value each other."*
- ♦ *"The Foundation is outstanding in all areas – when you need information, guidance, [and] communication the staff is very knowledgeable and will spend time to help whatever problems you may have."*
- ♦ *"MCHCF has been extraordinarily helpful – from helpful tips, to reminders about deadlines, to quick responses when we have a question."*
- ♦ *"They are always available, even just to discuss ideas, potential funders, or challenges."*
- ♦ *"Very approachable Foundation staff – committed to helping grantees succeed and understanding that if a project does not reach all goals, that too is a valuable learning experience."*

Communication of Goals and Strategy

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

- higher than ninety percent of surveyed foundations
- higher than all other health conversion foundations



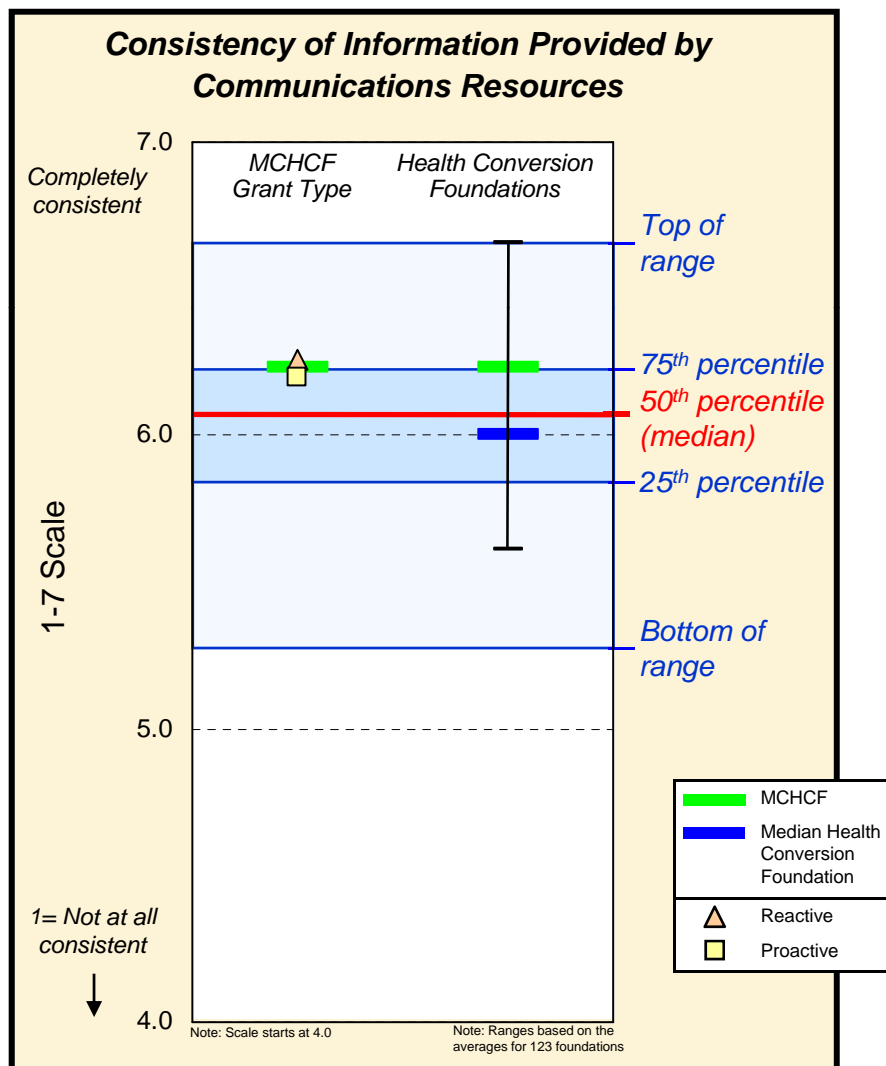
Selected Grantee Comments

- ♦ *“Written proposal guidelines and other communications are clear and straightforward. One gets a strong sense of mission from the Foundation.”*
- ♦ *“Very impressed with quality and clarity of information produced by Foundation.”*
- ♦ *“Efficient, timely and helpful guidelines published.”*
- ♦ *“Very thorough communications. All staff members are extremely helpful.”*
- ♦ *“Operations and processes are strictly adhered to, sometimes without proper explanation to the grantee.”*

Consistency of Communications

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

- above the median foundation
- above the median health conversion foundation

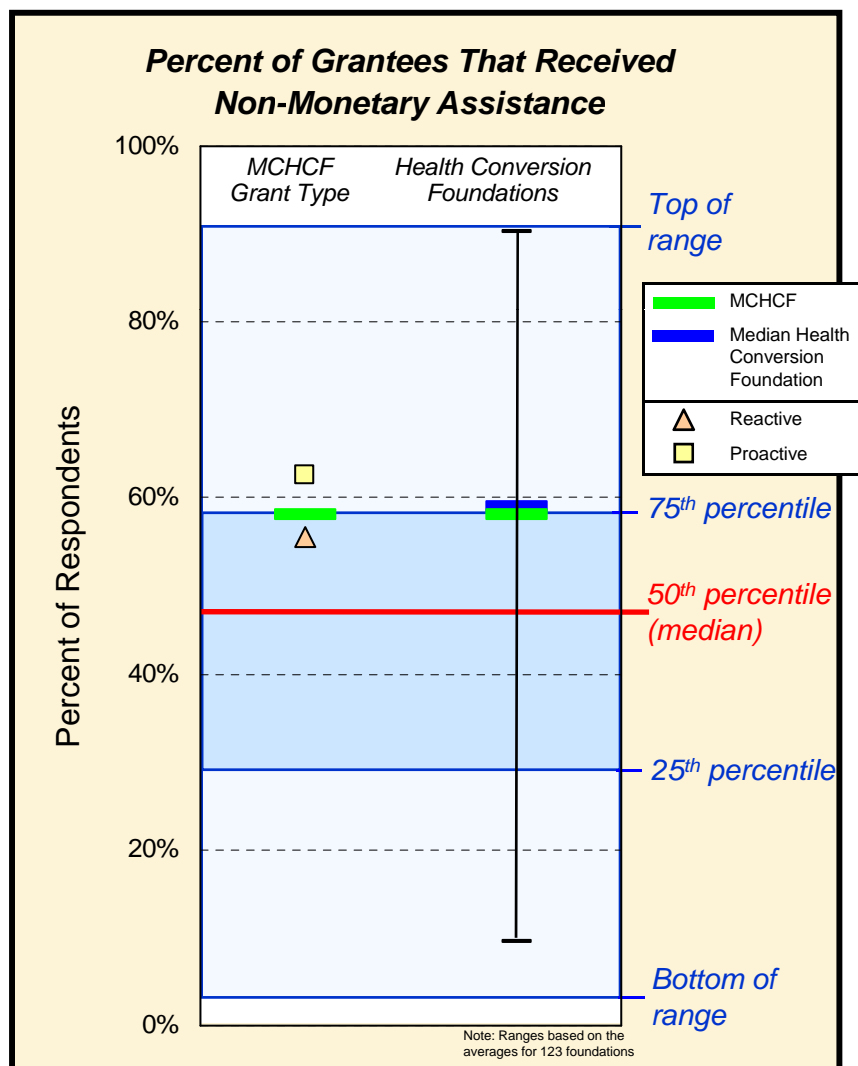


*Survey-Wide Analysis Fact: Consistency of Communications, both personal and written, is the best predictor of grantee ratings of a foundation's clarity of communication of its goals and strategy. Other predictors are 1) Quality of Interactions with Foundation Staff: fairness, responsiveness, approachability and 2) The helpfulness of a foundation's selection and reporting/evaluation processes in strengthening grantees' programs and/or organizations – key moments that can reinforce or undermine foundation messages. For more on these findings, key resources most valued by grantees, and management implications, please see CEP's report, *Foundation Communications: The Grantee Perspective*.*

Non-Monetary Assistance

The proportion of MCHCF grantees receiving any non-monetary assistance is:

- larger than that of the median foundation
- similar to that of the median health conversion foundation



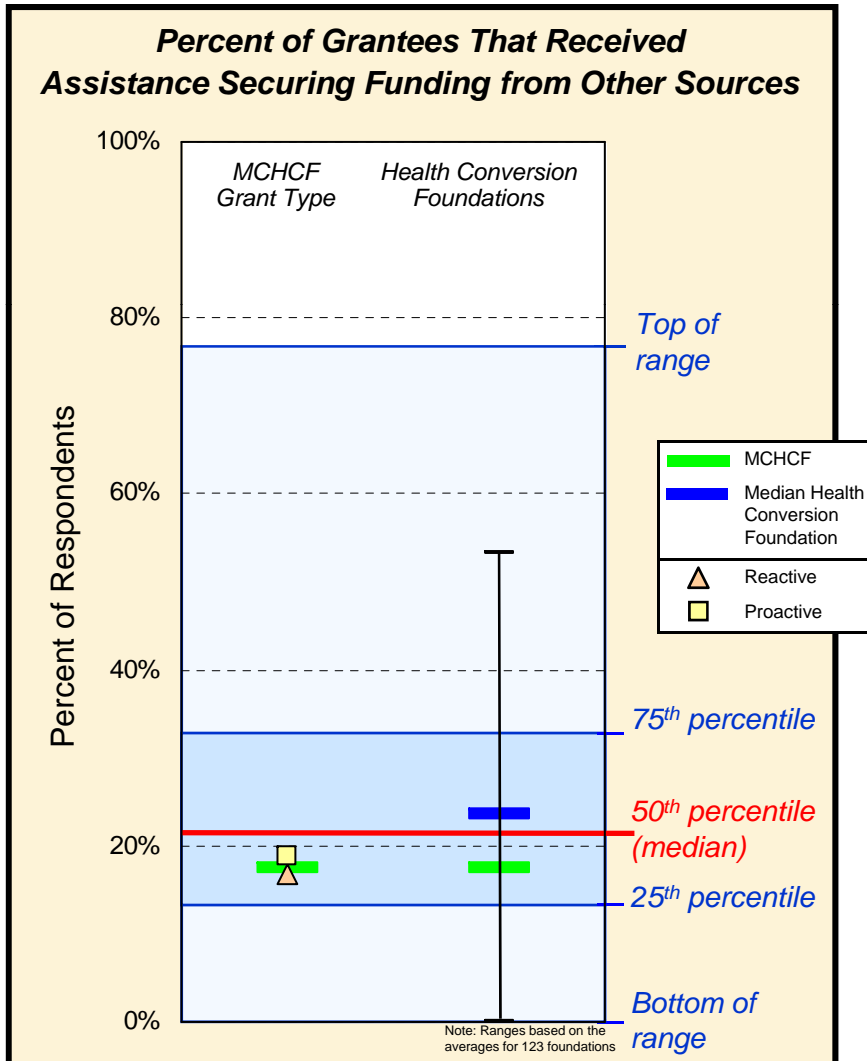
Selected Grantee Comments

- ♦ *“In addition to its monetary contributions, the Foundation has been incredibly supportive in planning, organizing, and executing our programs. They have provided meeting space, access to speakers and community leaders, and have helped us to develop relationships with people in the community. All of this additional support has made our jobs much easier to do.”*
- ♦ *“The Foundation has offered terrific training opportunities to grantees. They’ve selected wonderful trainers from the field.”*
- ♦ *“The Foundation has allowed this program to exist. Their workshops, support, and assistance has directly impacted student success and achievement.”*
- ♦ *“Non-monetary assistance so far has been in the form of advice and encouragement on our proposals and project, but I look forward to attending MCHCF training seminars, as well.”*

Proportion of Grantees Obtaining Assistance Securing Funding

The proportion of MCHCF grantees receiving active assistance from the Foundation in securing funding from other sources is:

- similar to that of the median foundation
- smaller than that of the median health conversion foundation



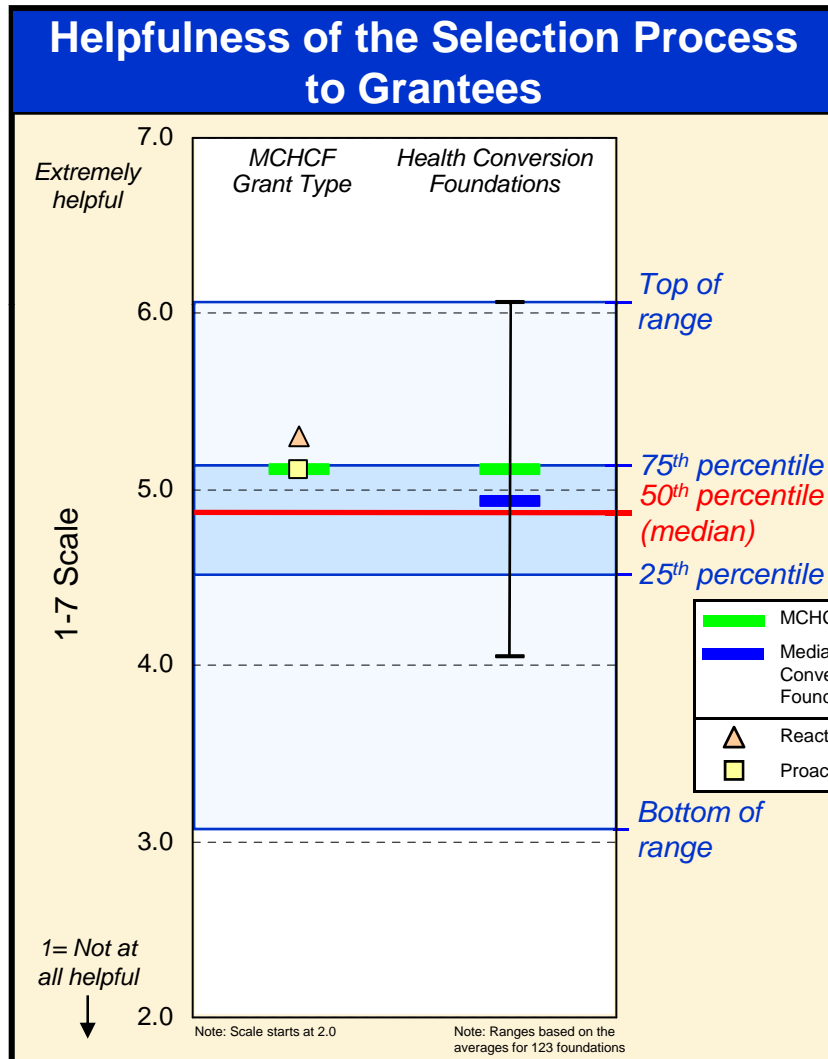
Selected Grantee Comments

- ♦ “[My program officer] has been very generous with letters of support when we are seeking other funding.”
- ♦ “As a new grantee I will look to the organization for assistance this year in seeking ways to sustain the program once this program is no longer eligible.”

Helpfulness of Selection Process

On helpfulness of the Foundation's selection process in strengthening the grantee, MCHCF is rated:

- above the median foundation
- similarly to the median health conversion foundation



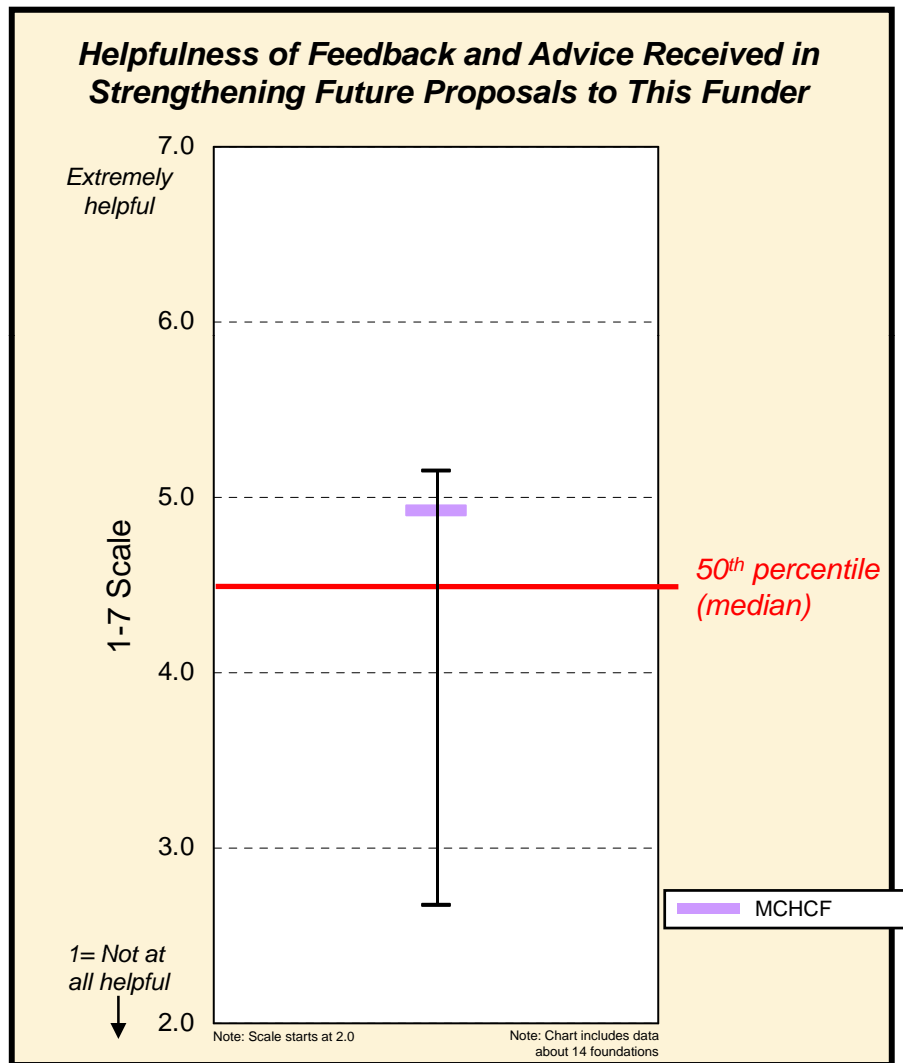
Selected Grantee Comments

- ♦ “Very helpful and quality presentation for prospective grantees prior to proposal submission ... Most helpful grantee process we’ve experienced thus far in our history with Federal, state, and charitable foundation grants.”
- ♦ “I had never written a grant proposal before. Following the guidelines from the website was extremely helpful. The biggest obstacle I encountered was budgetary estimations and process.”
- ♦ “We were not initially funded the first time we submitted for our project. MCHCF was extremely helpful in providing critical feedback and helpful strategies to reframe our project so that we would be more likely to get funded the second time around. This greatly assisted us in fine-tuning/our project while also improving our proposal. The funding we secured the second time around has been better spent because of the work we put into revising the project after we were declined first – if that makes sense! This project has been phenomenal and we couldn't have gotten it started without the guidance and financial support of MCHCF.”

Helpfulness of Feedback Received (1)

On the helpfulness of feedback and advice received in strengthening future proposals to the Foundation, MCHCF is rated:

- above the median foundation



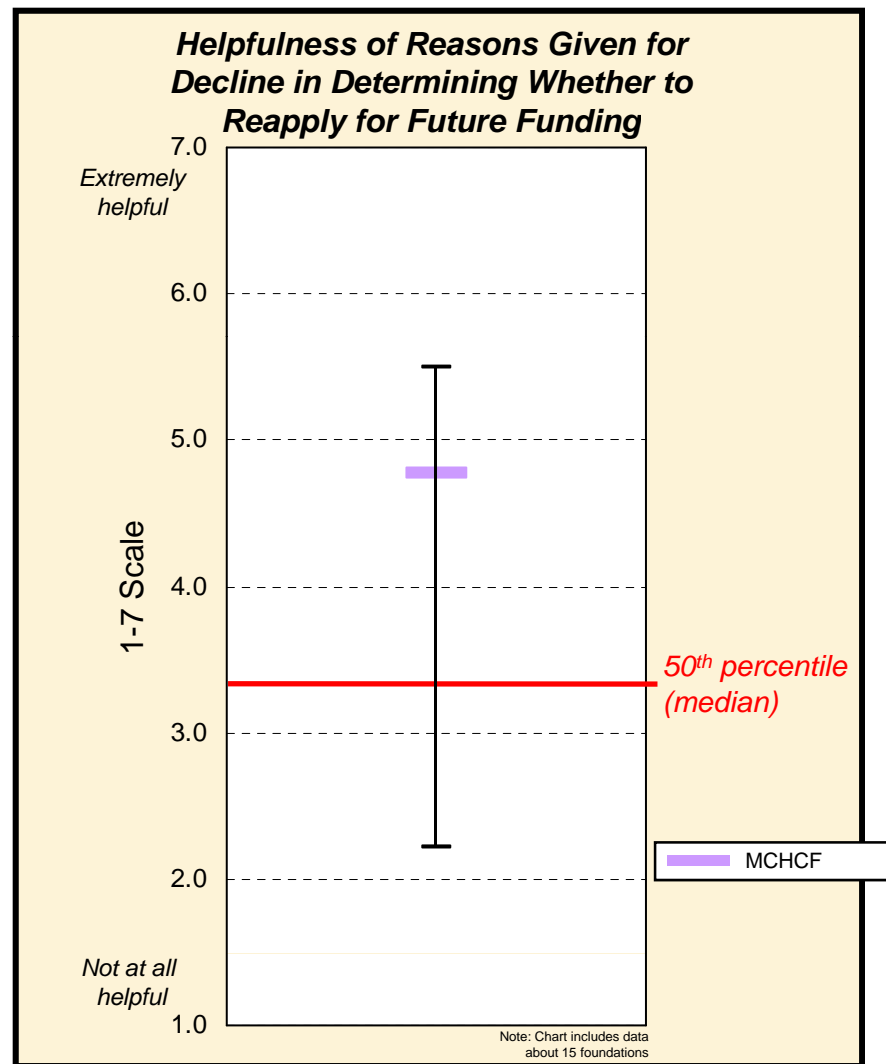
Selected Declined Applicant Comments

- ♦ *“The most helpful was the willingness of the ED to have a thoughtful conversation with us following the decision.”*
- ♦ *“One of the frustrations was the virtual lack of feedback.”*
- ♦ *“We get clear, honest feedback when we seek it, and we get helpful guidance about how to improve and shape our ideas and proposals.”*
- ♦ *“The rejection offered no comments and a phone call received no response. I would like to reapply and work with the Foundation but have no basis to understand if that is a reasonable consideration.”*

Helpfulness of Reason Given for Decline of Proposal

On helpfulness of the reason(s) given for the Foundation's decline in helping declined applicants determine whether to reapply for future funding, MCHCF is rated:

- above the median foundation



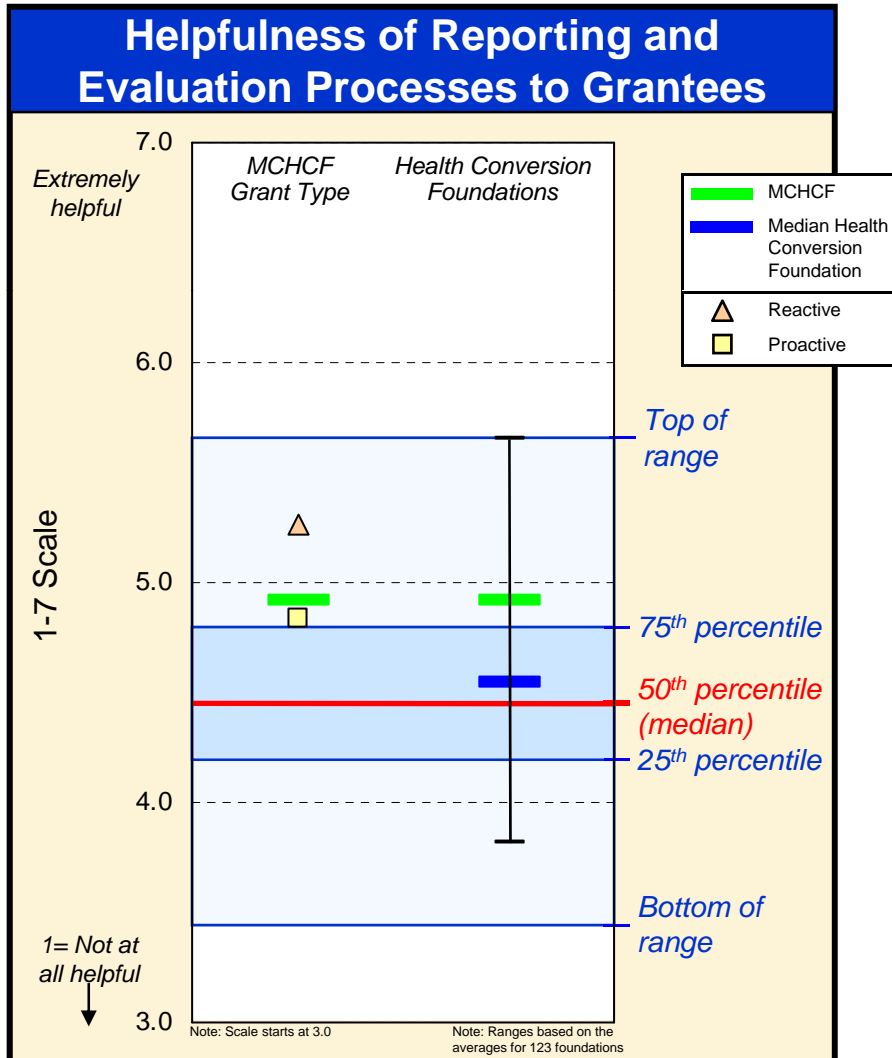
Helpfulness of Reporting and Evaluation Processes

On helpfulness of the Foundation’s reporting/evaluation process in strengthening the grantee, MCHCF is rated:

- above the median foundation
- above the median health conversion foundation

Selected Grantee Comments

- ♦ “Each year the Foundation becomes clearer in explaining the paperwork and procedures they expect for applications and for reports. They are very helpful. We feel as if they are good partners who want to help us be successful receiving and benefiting from their funds.”
- ♦ “The reporting process is very clear and easy to follow.”
- ♦ “It was very helpful in being held accountable for outcomes. It was frustrating working with their consultant because they did not seem to have experience in working in the community with non-profits and we spent hours and hours educating the consultants. Communication was confusing about reporting because the consultants had their ideas of reporting required which were different from the ones we had with the Foundation.”



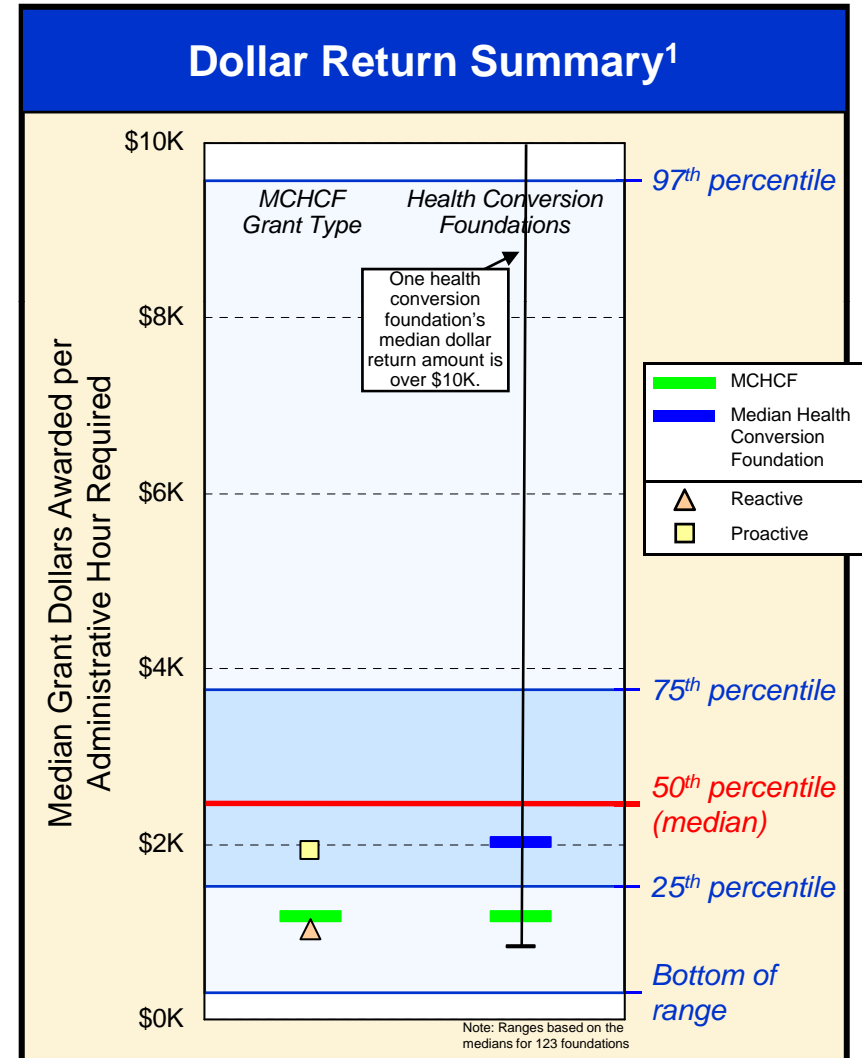
Dollar Return Summary

At the median, the number of dollars awarded per hour of administrative time spent by MCHCF grantees is:

- less than that of the median foundation
- less than that of the median health conversion foundation

This summary includes:

- *The total grant dollars awarded*
- *The total time necessary to fulfill the administrative requirements over the lifetime of the grant.*



¹: Dollar Return on Grantee Administrative Hours is calculated for each grantee and aggregated by foundation for the Dollar Return Summary. Chart does not show data from four foundations whose Dollar Return on Grantee Administrative Hours exceeds \$10K.

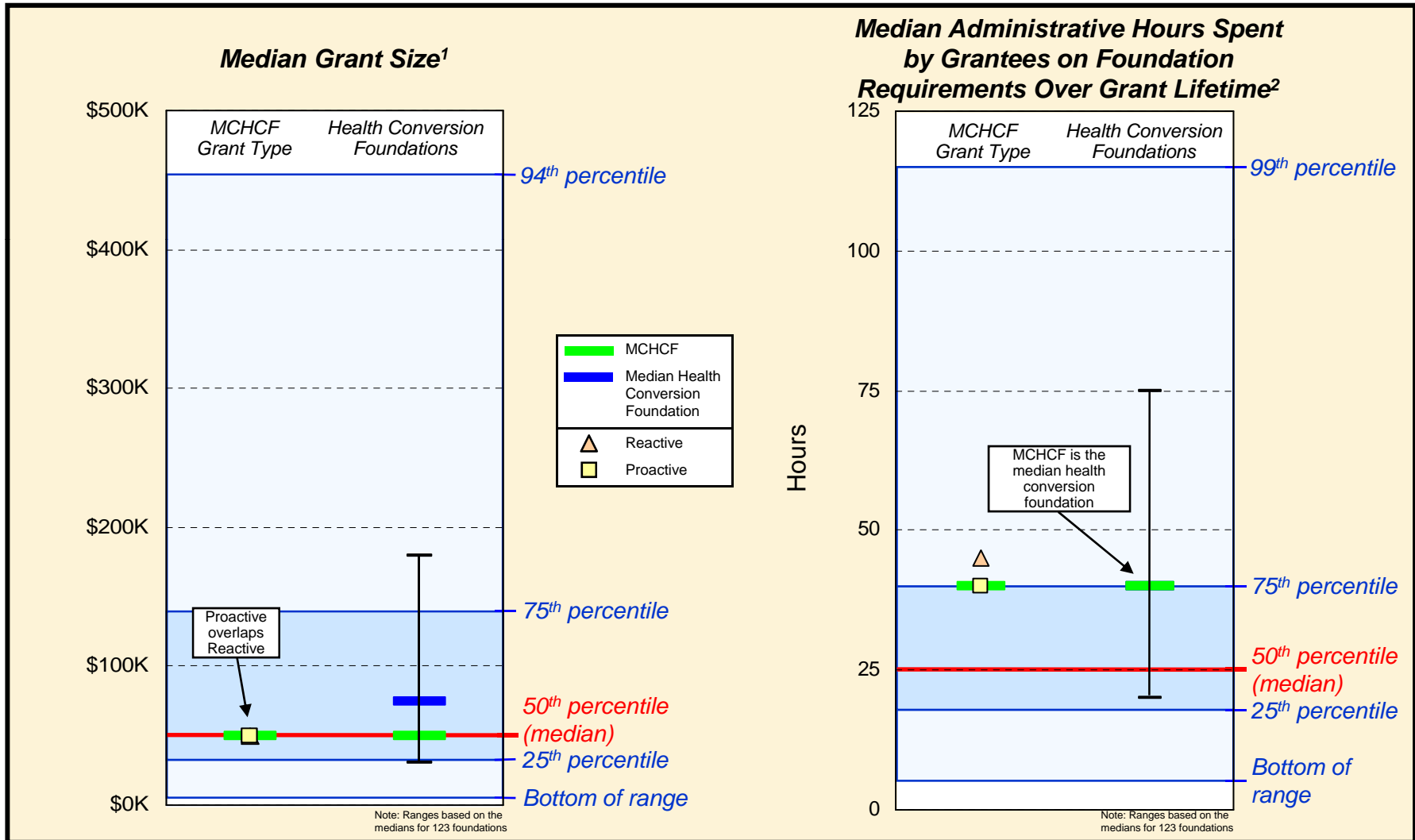
Grant Size and Administrative Time

At the median, the grant size reported by MCHCF grantees is:

- similar to that of the median foundation
- smaller than that of the median health conversion foundation

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

- greater than the time spent by grantees of the median foundation
- similar to time spent by grantees of the median health conversion foundation

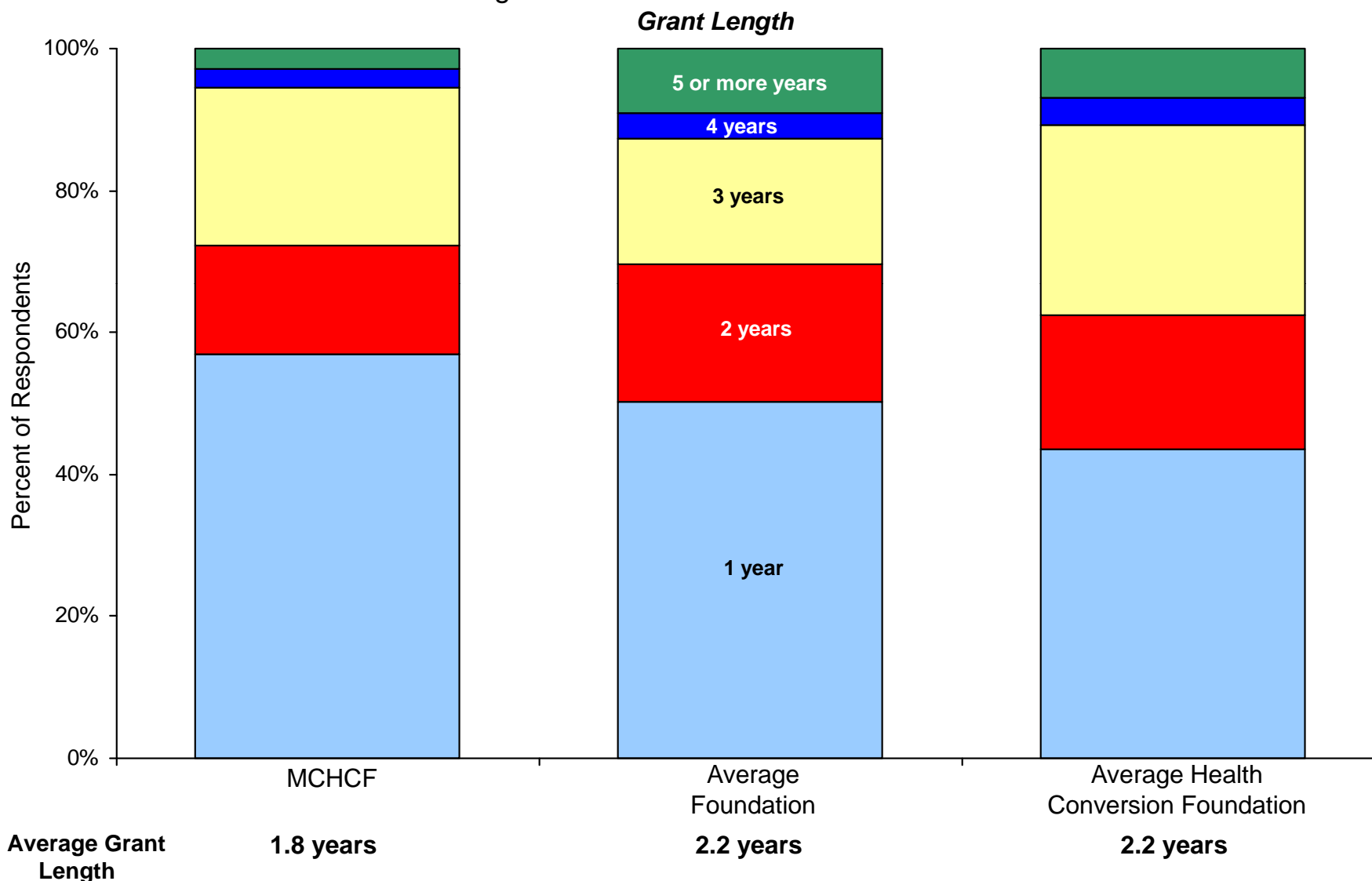


1: Chart does not show data from seven foundations whose median grant size exceeds \$500K.
2: Chart displays total grant proposal creation, evaluation, and monitoring hours spent over the life of the grant; each of these events did not necessarily occur for each individual grantee. Chart does not show data from one foundation whose median administrative hours exceeds 125 hours.

Grant Length (1)

The proportion of MCHCF grantees that were awarded multi-year grants is:

- similar to that of the average foundation
- smaller than that of the average health conversion foundation

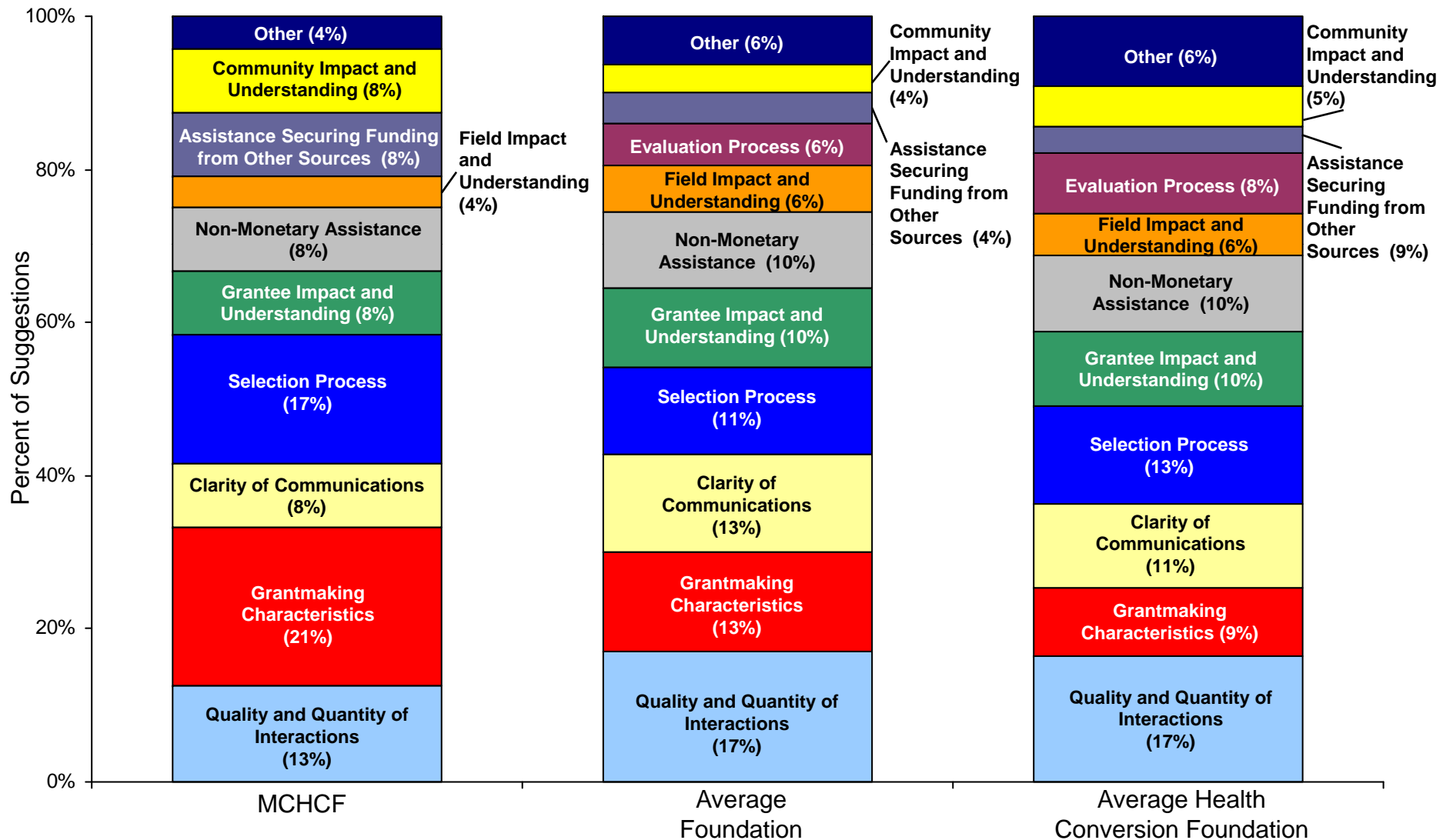


Note: This chart includes data about 123 foundations.
Grant lengths in chart are rounded to the nearest year.

Grantee Suggestions for the Foundation (1)

Grantees were asked to provide any suggestions for how the Foundation could improve. A larger than typical proportion of MCHCF's 24 suggestions concern grantmaking characteristics and the selection process.

Topics of Grantee Suggestions



Note: This chart includes data about 99 foundations. There were a total of 24 grantee suggestions for MCHCF.

Analysis and Discussion (1)

♦ High Ratings on Most Dimensions

- The MetroWest Community Health Care Foundation is rated highly by its grantees on most dimensions of the grantee survey. The Foundation is often rated above the median foundation and the median health conversion foundation in the comparative set, and receives particularly high ratings – at or above the 75th percentile – on the measures of overall grantee satisfaction, impact and understanding of grantees' communities, quality of interactions, the provision of assistance beyond the grant check, and the helpfulness of the selection processes in strengthening grantee organizations.

♦ Dollar Return per Administrative Hour Required

- Grantees rate the helpfulness of the Foundation's proposal/selection process above the rating of the median foundation. However, MCHCF grantees spend more hours on the proposal/selection process than the typical foundation grantee (75th percentile), reducing the number of dollars awarded per administrative hour required of grantees. Some grantees comment that they would like the Foundation to "simplify" its proposal and selection process.
- On average, MCHCF provides slightly shorter grants compared to other foundations. MCHCF grantees who receive multi-year grants rate the Foundation significantly higher¹ on many measures, including overall satisfaction with the Foundation, overall effectiveness in creating social impact, and understanding of the organization's goals and strategies, fields, and local communities. A larger than typical proportion of grantee suggestions for improvement concern grantmaking characteristics – a number of grantees comment that they would like more "multiple-year support" from the Foundation.
- A smaller than typical proportion of MCHCF grantees report that they received grants of \$100,000 or more (MCHCF: 33%, average foundation: 41%, average health conversion foundation 49%) and the Foundation funds a smaller proportion of grantee organizations' budgets compared to other foundations (23rd percentile).
 - *Can the Foundation streamline the proposal/selection process without sacrificing the attributes most helpful to grantees and the Foundation?*
 - *Can the Foundation provide larger and/or longer-term grants?*

Analysis and Discussion (1)

♦ Assistance Securing Funding From Other Sources

- Seventeen percent of MCHCF respondents report receiving active assistance securing funding from other sources, compared to 21 percent at the median foundation and 24 percent at the median health conversion foundation.
- Grantees who received assistance securing funding from other sources rate the Foundation significantly higher¹ on a number of measures, including overall satisfaction and impact on their fields and local communities.
- Just half (54%) of MCHCF grantees reported receiving funding from other foundations, a much smaller proportion compared to the median foundation (92%) and the median health conversion foundation (77%).
 - *Do more opportunities exist for MCHCF to help grantees secure funding from other sources, especially other foundations?*
 - » *If yes, can the Foundation provide more of this type of assistance?*

♦ Differences in Ratings between MCHCF Grant Types

- Ratings between MCHCF grant types differ on a number of measures, with Proactive grantees tending to rate the Foundation higher, including measures of overall satisfaction with the Foundation, overall effectiveness in creating social impact, field-related measures, clarity of communications, and the provision of assistance beyond the grant check.²
- *Is the Foundation comfortable with the variation in grantee ratings between grant types?*
 - *Are variations consistent with intentional differences in program strategies?*
 - *How might the Foundation address any areas of lower performance?*

1: This difference is statistically significant at a 90 percent confidence level.

2: The differences on the measures of impact on grantees' fields, understanding of grantees' fields, and effect on public policy are statistically significant at a 90 percent confidence level.