

Grantee Perception Report®

prepared for

The James Irvine Foundation

Fall 2006

**Results for Core Grantees
(President's / Chairman's Fund and Board Approved)**

VERSION 2/12/2007



THE CENTER FOR
EFFECTIVE PHILANTHROPY

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Background

- ◆ Since February 2003, the Center for Effective Philanthropy (CEP) has conducted surveys of grantees on their perceptions of their foundation funders both on behalf of individual foundations and independently. The purpose of these surveys is two-fold: to gather data that is broadly useful – forming the basis of research reports such as *Listening to Grantees: What Nonprofits Value in Their Foundation Funders* (2004) and *Foundation Communications: The Grantee Perspective* (2006) – and to provide individual foundations with Grantee Perception Reports.

- ◆ **The Grantee Perception Report® (GPR) shows an individual foundation its grantee perceptions relative to a set of perceptions of other foundations whose grantees were surveyed by CEP.**
 - 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 unique strategy of the foundation.
 - The survey covers many areas in which grantees' perceptions might be useful to a foundation. Each foundation should place emphasis on the areas covered according to the foundation's specific priorities.
 - Low ratings in an area that is not core to a foundation's strategy may not be concerning to a foundation. For example, a foundation 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, foundation structural characteristics – such as type, asset size, focus, and age – are not strong predictors of grantee perceptions, suggesting that it is possible for all foundations to attain high ratings from grantees.

Methodology (1)

- ◆ The Center for Effective Philanthropy (CEP) has surveyed more than 40,000 grantees of 190 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 more than 19,000 grantee responses of 143 foundations.
 - CEP surveyed 237 fiscal year 2005 grantees of The James Irvine Foundation (“Irvine”) during September and October 2006 and CEP received 171 completed responses, a 72 percent response rate.¹
 - Out of the 237 grantees surveyed, 136 were President/Chairman’s Fund and Board Approved (“Core”) grantees.² CEP received 107 Core grantee responses, a 79 percent response rate.¹
 - The following report focuses solely on these Core grantees. Results for Irvine’s New Connection Fund (“NCF”) grantees are provided to the Foundation in a separate GPR.
 - Grantees submitted responses via mail and the Web.³

- ◆ Irvine 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 65 percent.

2: CEP determined grant designations of grantees (Core vs. NCF) through analysis of identifying information such as organization name and grant size. Five grantees were unable to be identified.

3: Forty Core grantee respondents answered on paper and 67 replied online. There are no meaningful differences between responses received via the mail or the Web.

Methodology (2)

- ◆ The average response for Irvine Core grantees is shown throughout this report relative to the range of responses for all foundations CEP has surveyed from 2004 through 2006.
 - In addition, Irvine Core grantee responses are compared to responses for a cohort of peer foundations. The 15 foundations that comprise this group are:
 - Bill & Melinda Gates Foundation
 - The California Endowment
 - Charles Stewart Mott Foundation
 - The David and Lucile Packard Foundation
 - Doris Duke Charitable Foundation
 - The Duke Endowment
 - Evelyn and Walter Haas, Jr. Fund
 - The Heinz Endowments
 - The James Irvine Foundation
 - Lumina Foundation for Education
 - Rockefeller Brothers Fund
 - Surdna Foundation
 - W.K. Kellogg Foundation
 - The Wallace Foundation
 - The William and Flora Hewlett Foundation

Key Findings

Across most measures in the survey, PCF and Board Approved (“Core”) grantees of the James Irvine Foundation (“Irvine”) rate the foundation positively. Compared to the ratings received by other foundations, Irvine’s ratings are more mixed: the Foundation’s impact on its fields of funding is rated relatively highly, as is its impact on grantee organizations, the helpfulness of its selection process, and the helpfulness of the reporting and evaluation process. The Foundation is rated less positively than other foundations on its impact on the communities in which it funds. Ratings of satisfaction and quality of interactions (particularly responsiveness of staff and fairness of Foundation treatment) are rated below the median among all foundations.

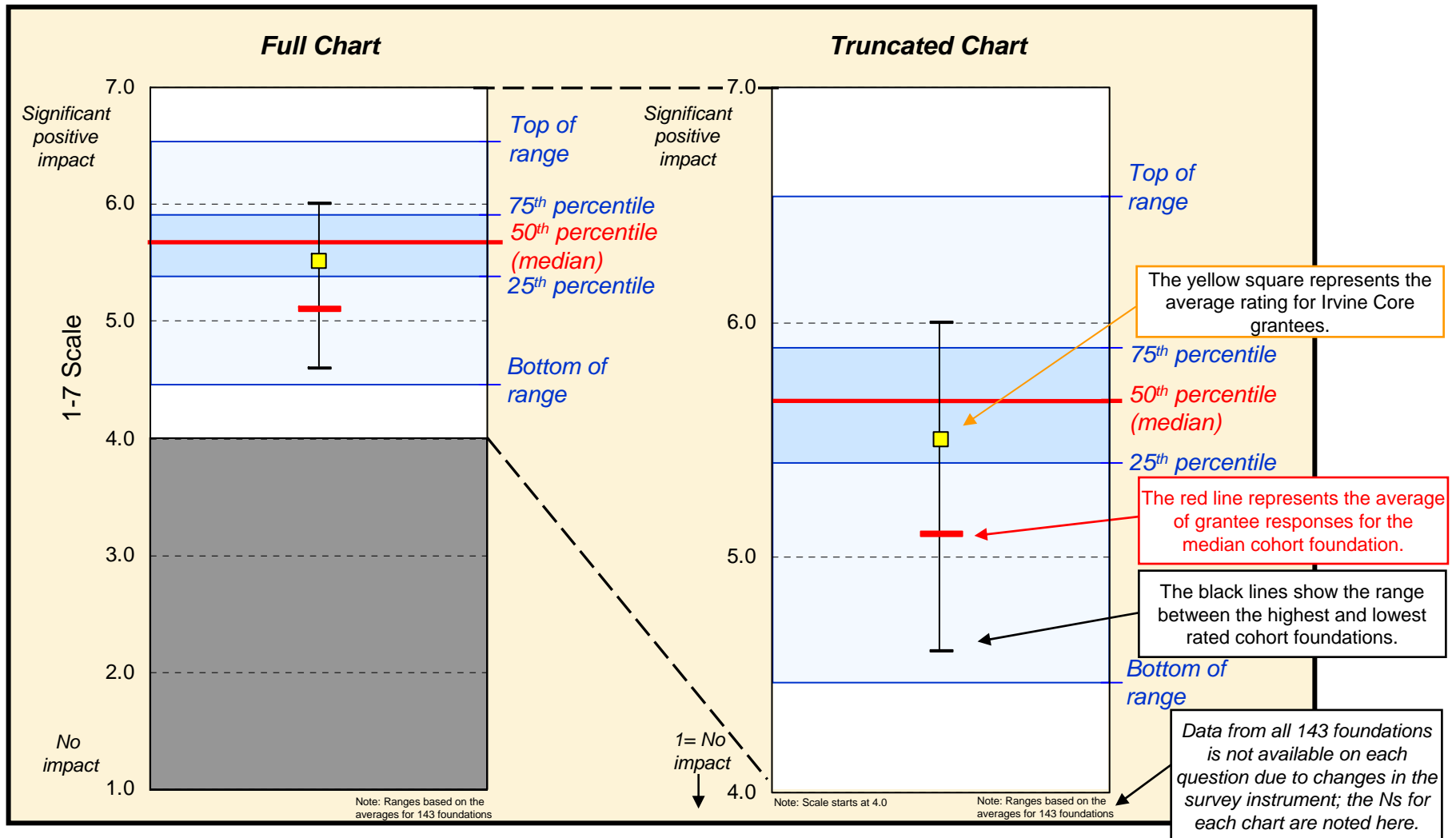
When asked to provide three words or phrases that best describe the Foundation, Core grantees most frequently mention the Foundation’s focus on “California,” its “progressive” grantmaking, and its “responsive” and “supportive” character. When asked to make suggestions for improvement, the largest group of grantee comments concern improving the quality of interactions, with several grantees suggesting that staff transitions have had a negative impact on their work. Other grantees suggest that they would like to have “more” or “more positive” interactions with staff.

The clarity with which the Foundation communicates its goals and strategy is rated similarly to the rating of the median foundation, and the Foundation’s communication resources, both written and personal, are perceived to be as consistent in the information provided as the median foundation. Core grantees report a much more involved proposal process compared to the median foundation. The helpfulness of the selection and reporting and evaluation processes in strengthening grantee programs and organizations is rated highly.

Core grantees receive more non-monetary assistance than grantees of the median foundation in the comparative set, and the assistance provided by the Foundation and the third parties with which it contracts is frequently viewed as more helpful to grantees than typical. Irvine provides a typical proportion of Core grantees with active assistance in securing funding. Core grantees receive much more money relative to the time they spend on Foundation processes than is typical, and some grantees comment that the Irvine’s funding has been “catalytic.”

Reading GPR Graphs

Much of the grantee perception data in the GPR is presented in the format below. These graphs show average ratings of grantee responses for individual foundations, over a background that shows percentiles for the full sample of grantee ratings of all 143 foundations. **Throughout the report, many charts in this format are truncated from the full scale because foundation averages fall within the top half of the range.**

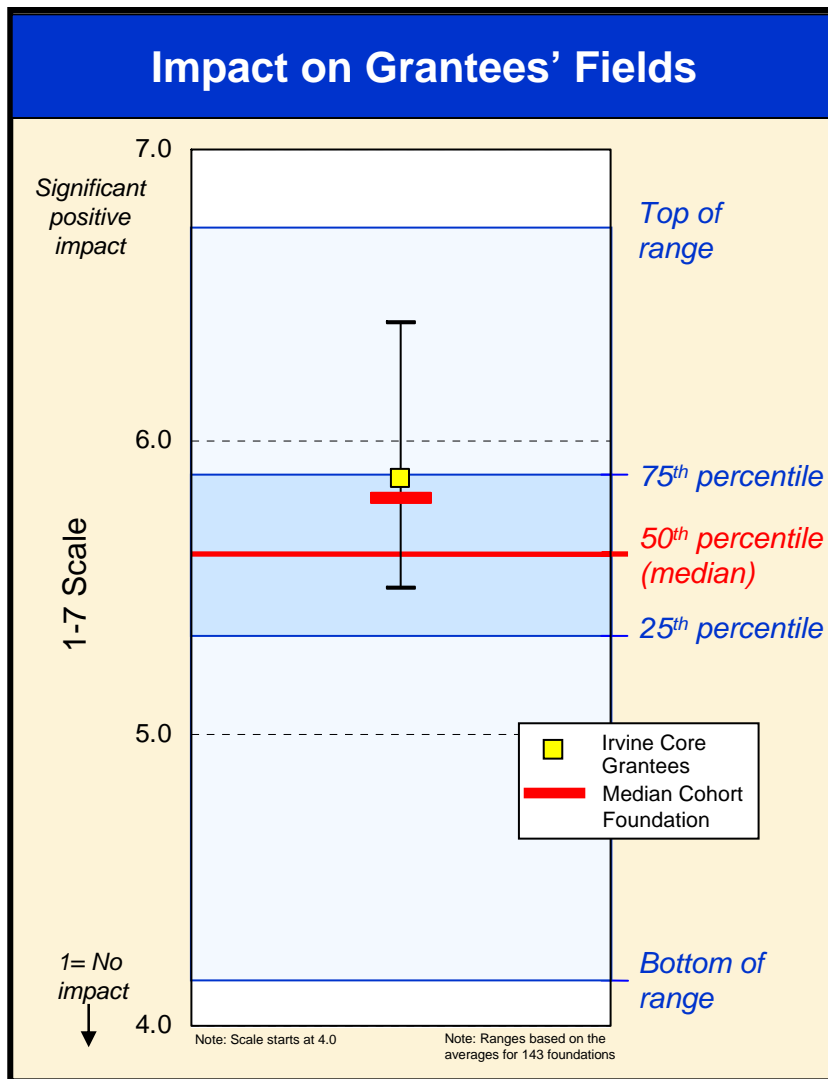


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Impact on Grantees' Fields

Irvine Core grantees rate the Foundation's impact on their fields above the rating received by the median foundation and similar to the median cohort foundation.

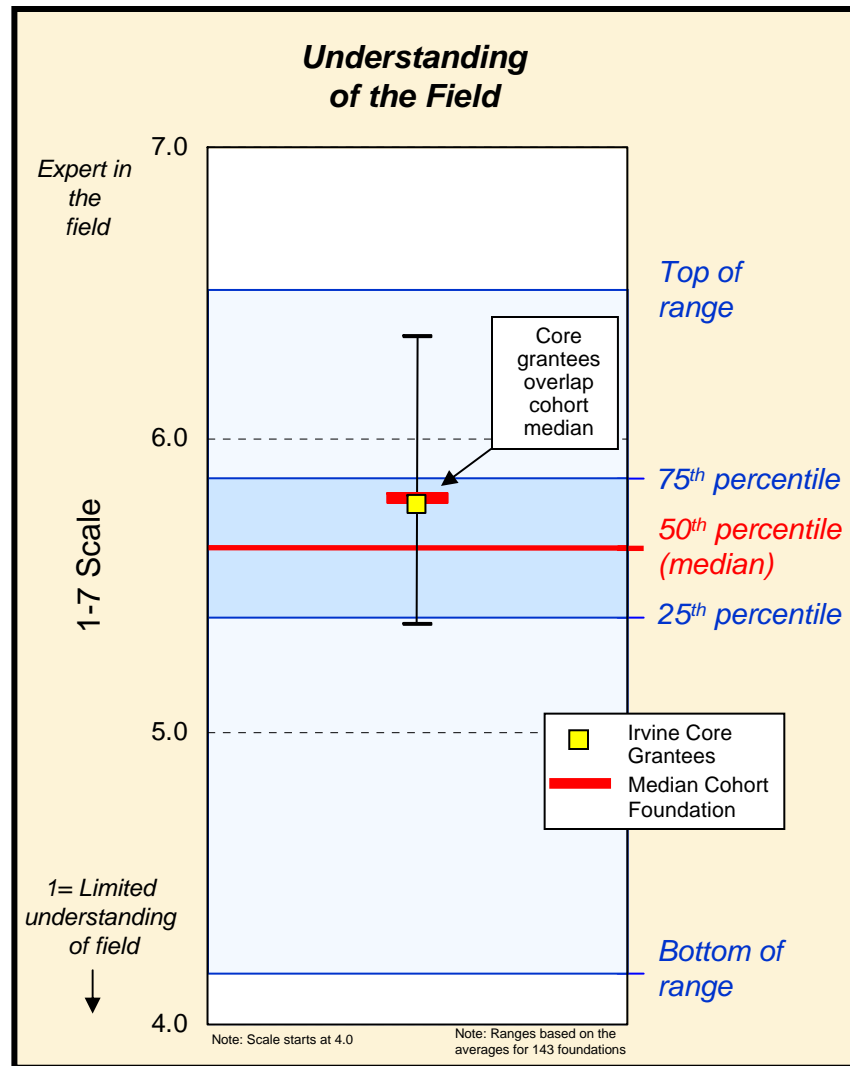


Selected Grantee Comments

- ◆ *“The Irvine Foundation, through the California Perspectives program, continues to have the single largest impact of any funder in the state on public policy in California.”*
- ◆ *“The Irvine Foundation has been consistently the most progressive funder in our field in California.”*
- ◆ *“The Irvine Foundation has always been a leader in the community foundation movement and as such have taken it upon themselves to be knowledgeable about the field and the community in which we work.”*
- ◆ *“The Foundation has had wide-ranging impact on the field, thanks to its broad based arts funding programs and the sizable amount of the grants.”*
- ◆ *“Irvine has had a major impact in higher education in California but that impact is declining because higher education is subsumed under other funding areas.”*
- ◆ *“The Foundation has strengthened the field by supporting innovation and institutional growth.”*
- ◆ *“The Foundation's recent research report on critical issues facing the arts in California is the single most cogent study of the issues and the challenges I have read for decades.”*

Understanding of Grantees' Fields

Irvine Core grantees perceive Irvine to have a greater understanding of grantees' fields than the median foundation and a similar understanding as the median cohort foundation.

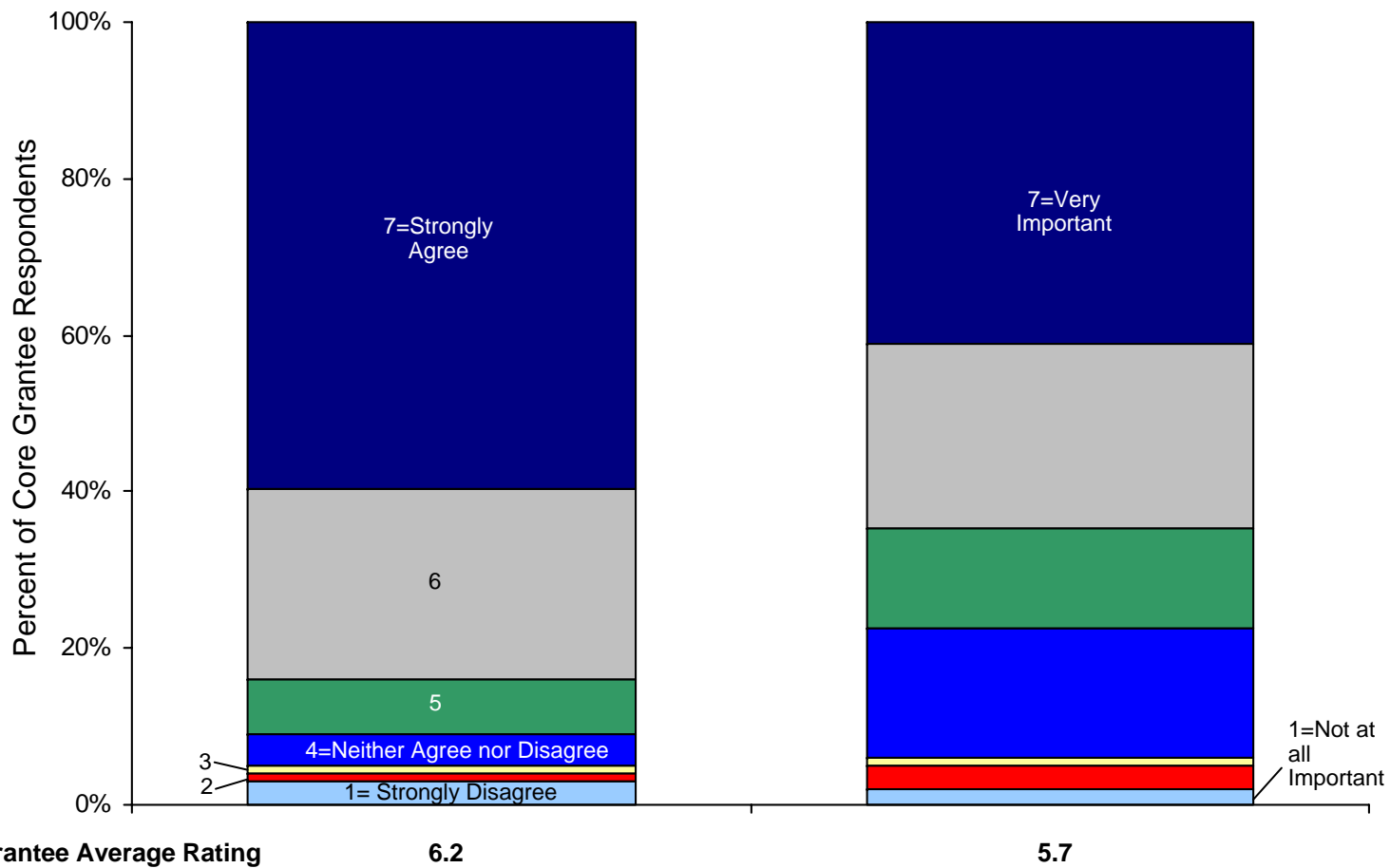


Note: This question includes a "don't know" response option. Five percent of Irvine's Core respondents answered "don't know," compared to 8 percent at the median foundation.

Field Leadership

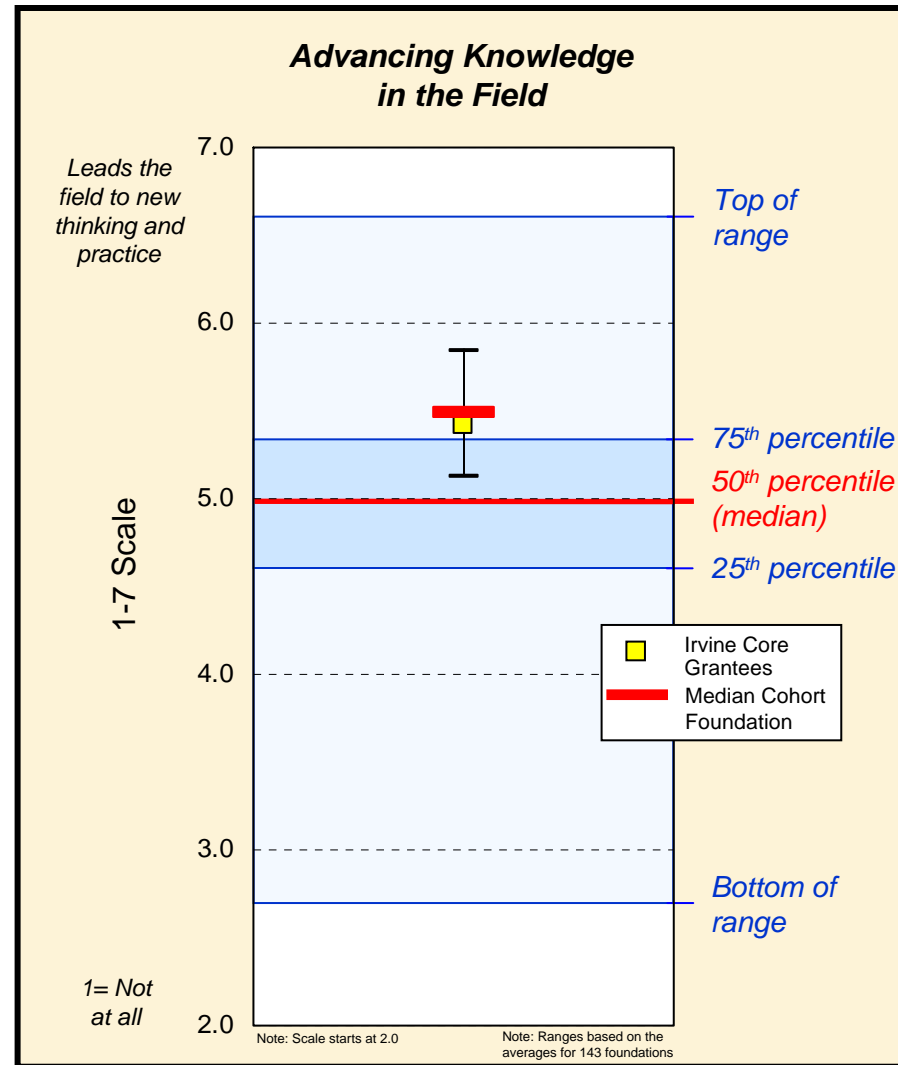
“From your experience, how much do you agree or disagree that the Irvine Foundation is regarded as a leader among foundations in your field?”¹

“How important is it to you that the Irvine Foundation is regarded as a leader among foundations in your field?”



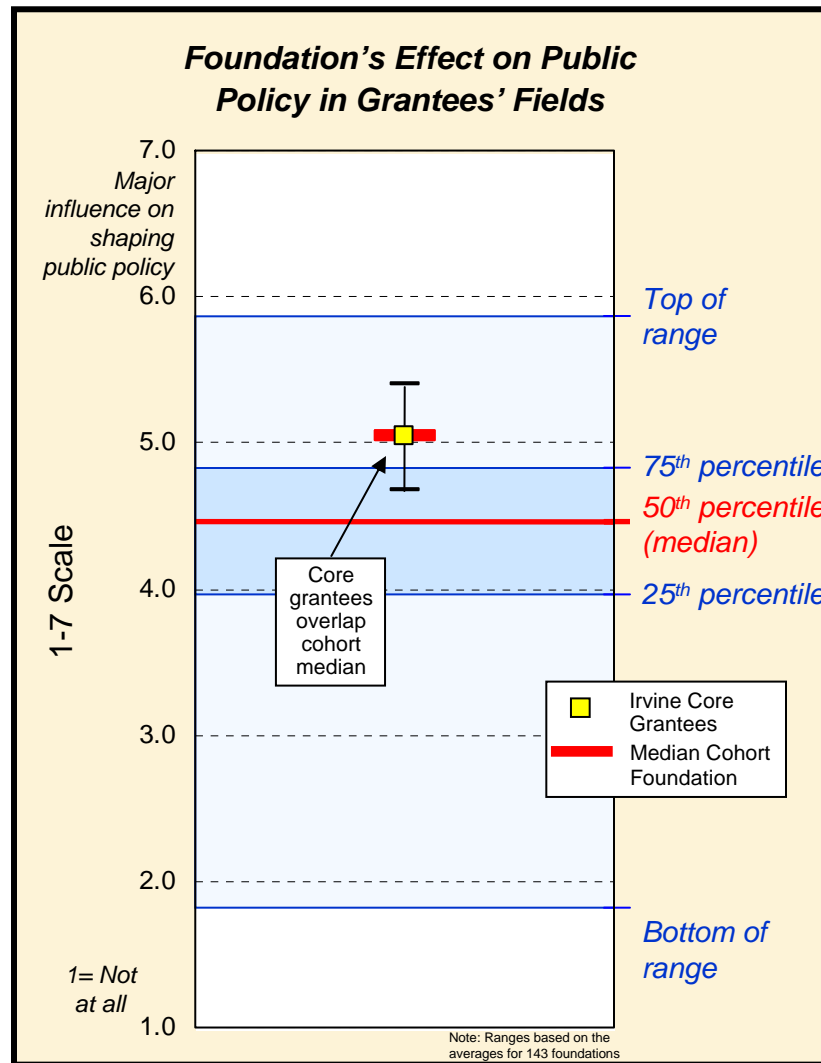
Advancing Knowledge in Grantees' Fields

Core grantees perceive Irvine to be advancing knowledge in grantees' fields to a greater extent than at the median foundation and similar to the median cohort foundation.



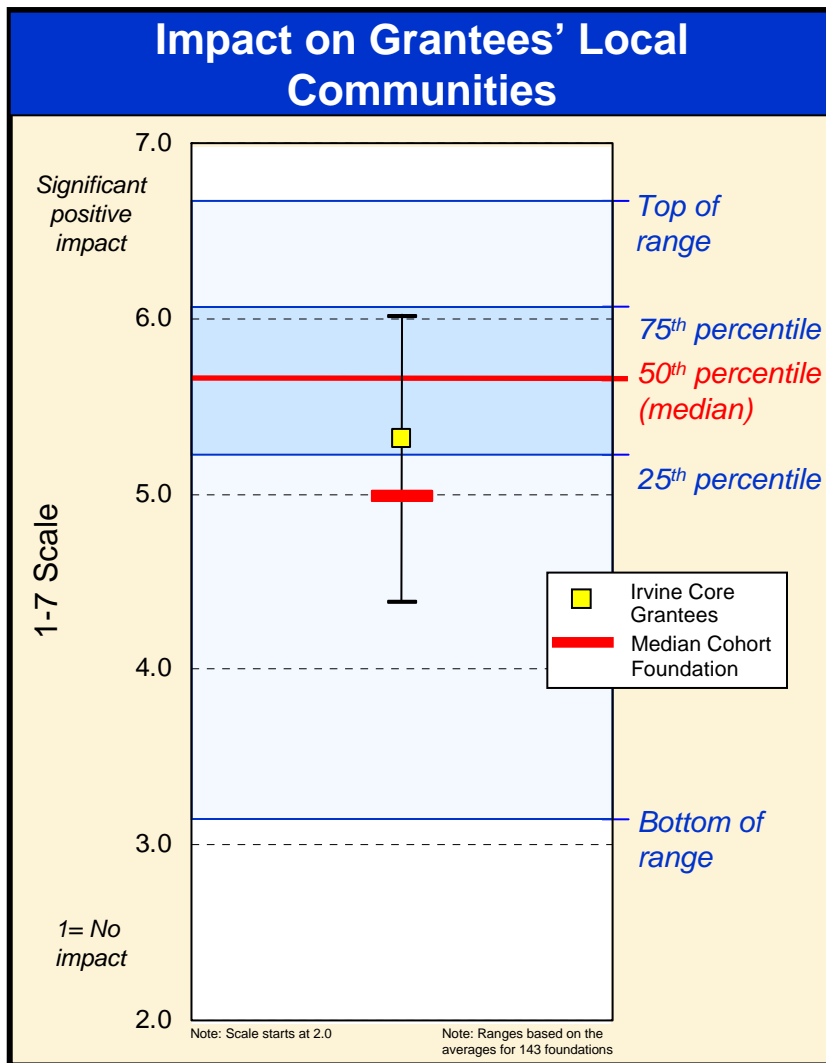
Effect on Public Policy

Irvine is seen by its Core grantees as having a greater influence on public policy than the median foundation and a similar influence as the median cohort foundation.



Impact on Grantees' Local Communities

Irvine's Core grantees rate the Foundation's impact on their local communities below the rating received by the median foundation and more positively than the rating received by the median cohort foundation.

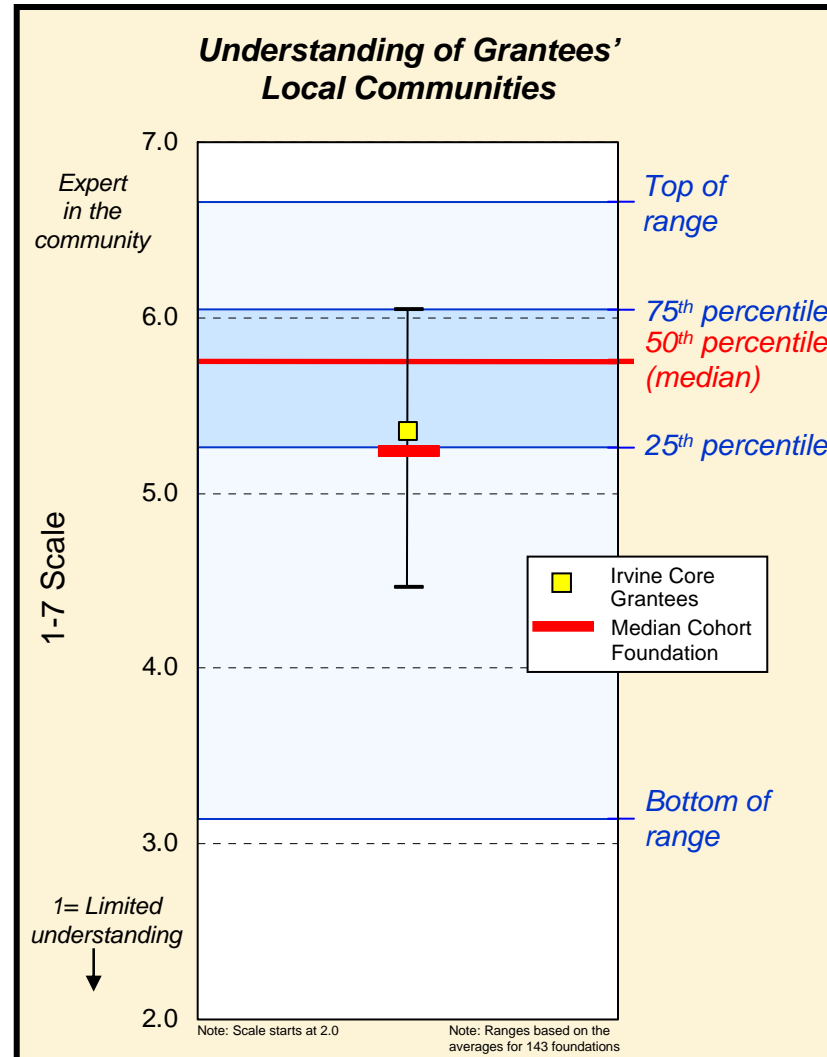


Selected Grantee Comments

- ♦ *"The Irvine Foundation was one of the first to commit to the Central Valley and has continually been strongly involved with many local organizations. I believe they have had a larger and more positive impact than any other organization."*
- ♦ *"[The Foundation] has impacted the community greatly with its generosity, although perhaps less in San Diego than in other communities in the state."*
- ♦ *"I think the Foundation is having a greater impact in Orange County and has been focusing efforts on underserved populations in the area."*
- ♦ *"The Foundation does not seem to value areas of need in urban areas, such as in San Francisco."*
- ♦ *"The James Irvine Foundation's vision for California and the example it sets for improving life in California for all of its residents has had a significant impact on our institution."*
- ♦ *"The Irvine Foundation probably knows more about San Diego than it's perceived to know. They don't have a substantial local presence."*

Understanding of Grantees' Local Communities

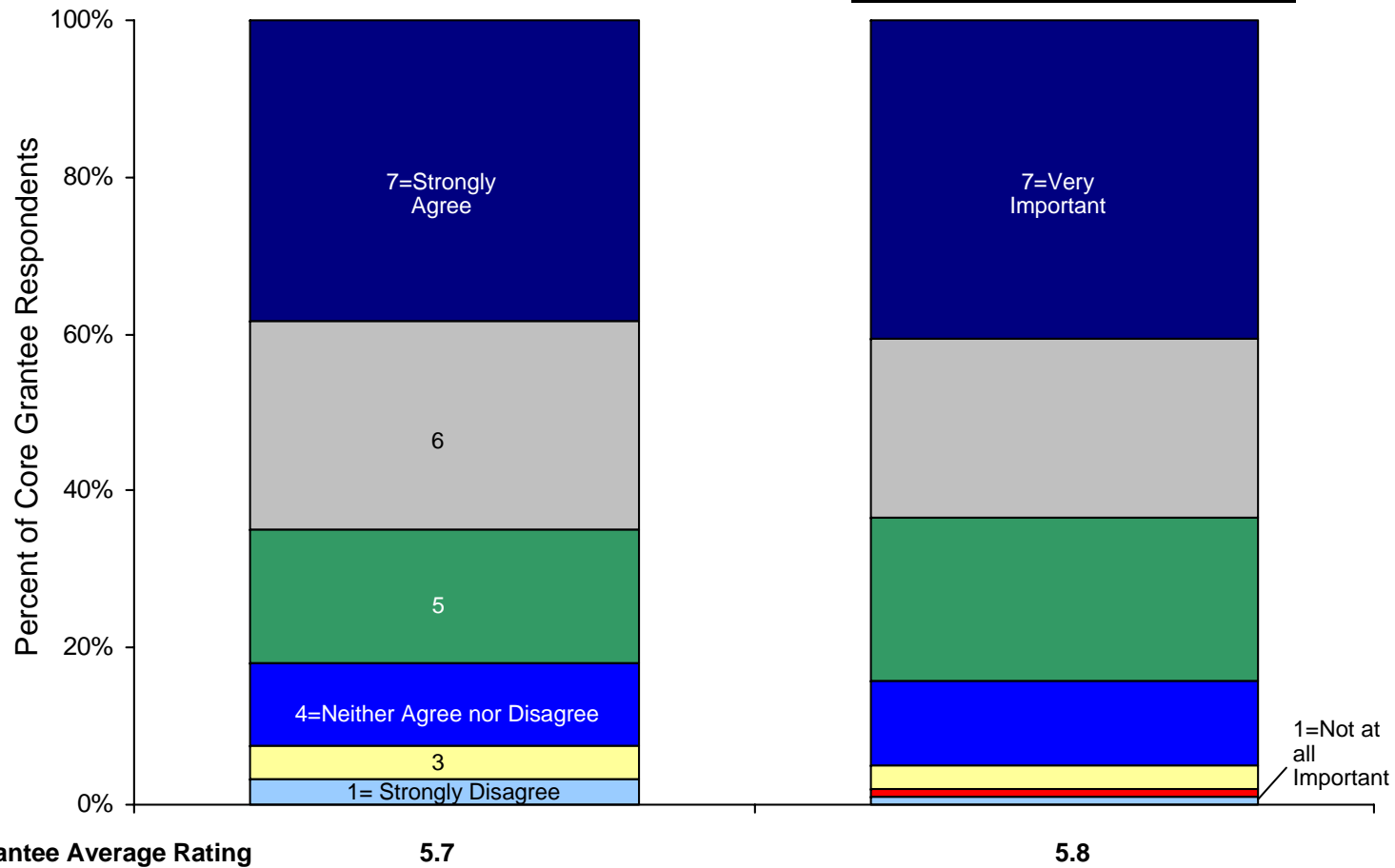
Irvine is perceived by its Core grantees as having a more limited understanding of grantees' communities than the median foundation and a typical understanding compared to the median cohort foundation.



Foundation as a Credible Resource

“From your experience, how much do you agree or disagree that the Irvine Foundation serves as a credible information resource on significant issues and trends in California?”¹

“How important is it to you that the Irvine Foundation serves as a credible information resource on significant issues and trends in California?”



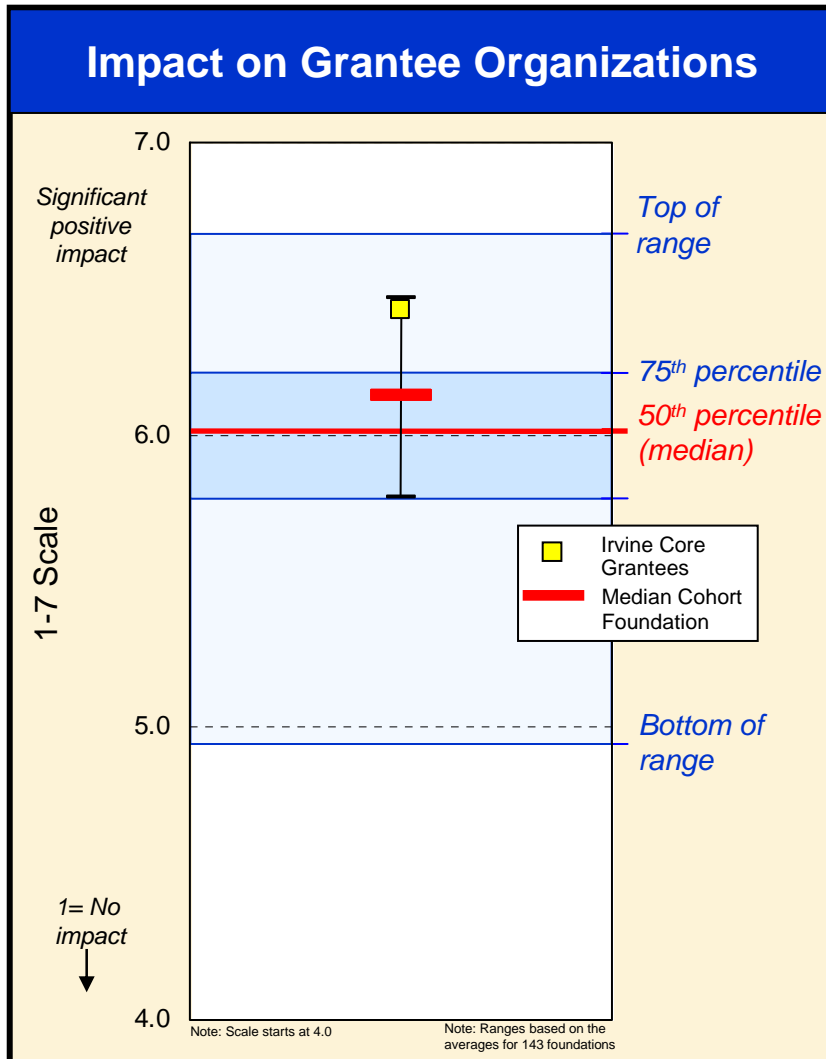
Note: No comparative data is available because these questions were only asked of Irvine grantees.
 1: This question included a “don’t know” option. Eight Core grantee respondents answered “don’t know.”

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Impact on Grantee Organizations

Core grantees rate the Foundation's impact on their organizations more positively than the ratings received by the median foundation and median cohort foundation.

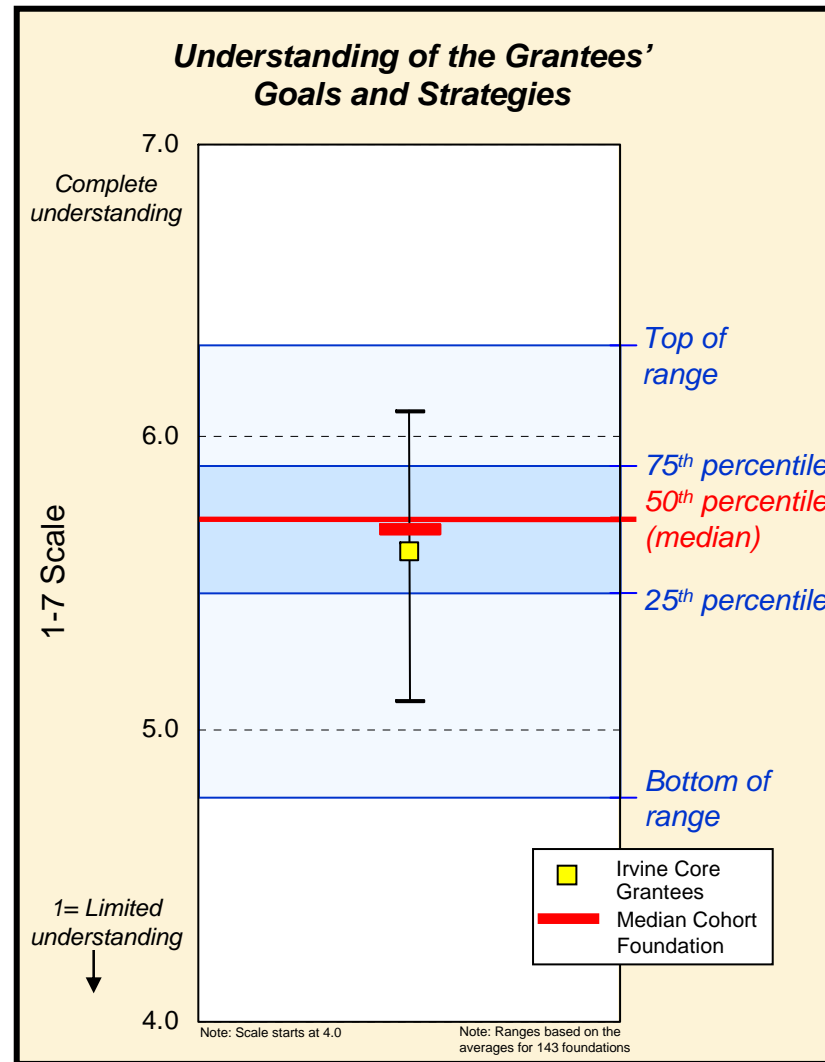


Selected Grantee Comments

- ♦ *"The Irvine Foundation has had, perhaps, the single greatest sustained impact of any foundation on our [organization] ... In our opinion, the Irvine Foundation has been the foundation that has had the greatest impact on the arts in California, bar none."*
- ♦ *"The Foundation has had a profound impact on us. It propelled our extensive work in the Central Valley for [many] years and has been an incredibly supportive organization to our work. When they see an organization like ours that does great work, they try hard to tend it, and that is a huge positive in our field rather than always moving on."*
- ♦ *"No other foundation has provided the scope and consistency to our organization."*
- ♦ *"The Foundation's support has allowed this organization to make significant and meaningful progress toward major goals."*
- ♦ *"The Foundation has made grants to the organization that strengthen it internally and will help it cope with challenges of growth and sustainability. The grants have allowed the organization to hire consultants and undertake initiatives that will affect not just one program or area of activity, but the effectiveness of the organization in everything it does."*

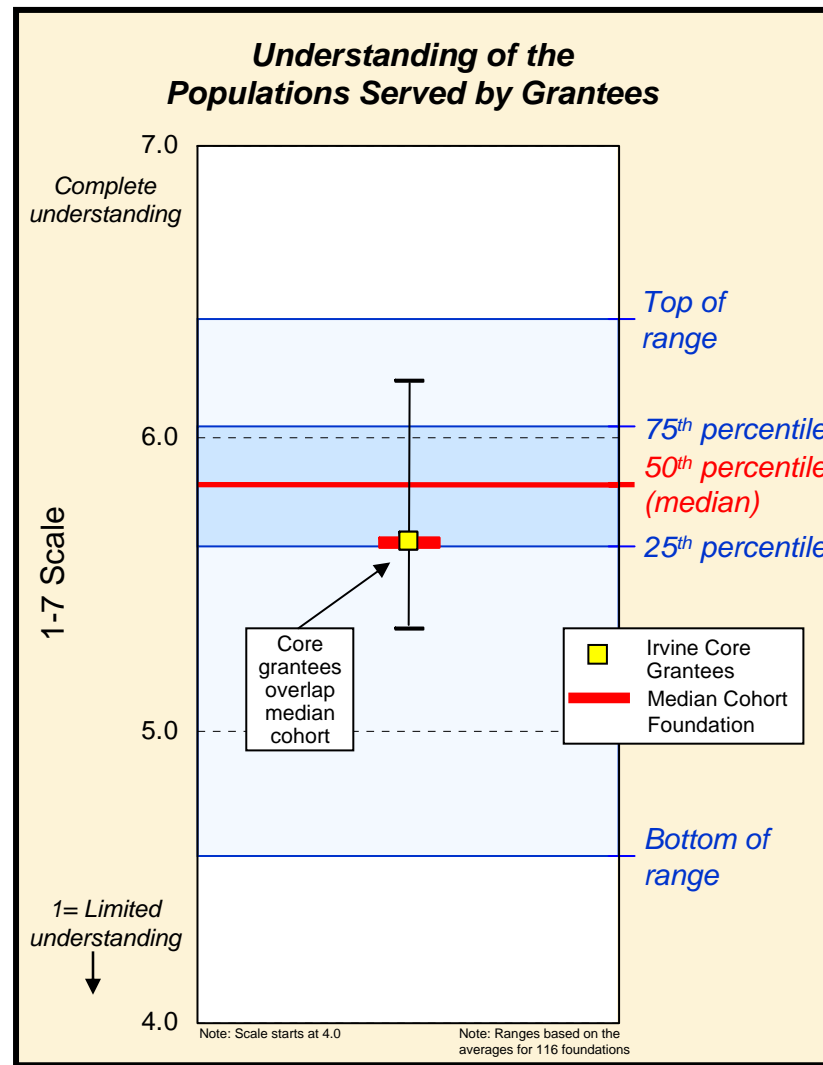
Understanding of Grantees' Goals and Strategies

Core grantees rate the Foundation's understanding of their organizations' goals and strategies similar to the rating received by the median foundation and the median cohort foundation.



Understanding of the Populations Served by Grantees

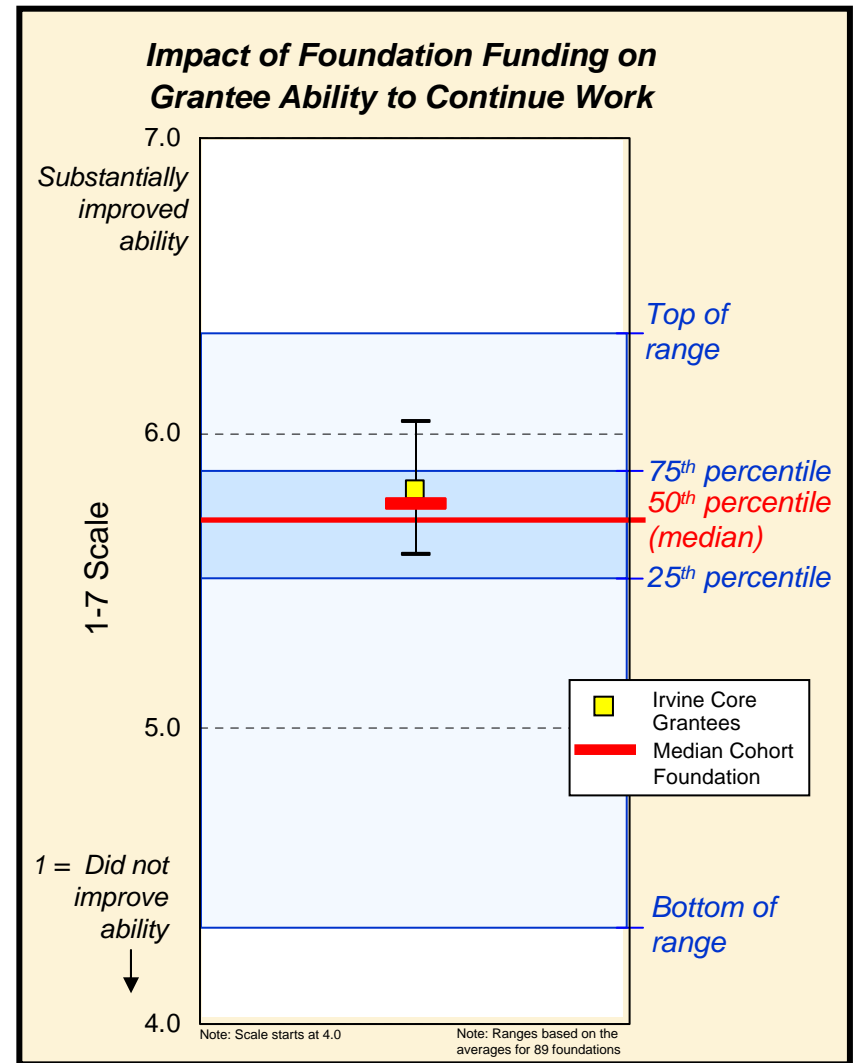
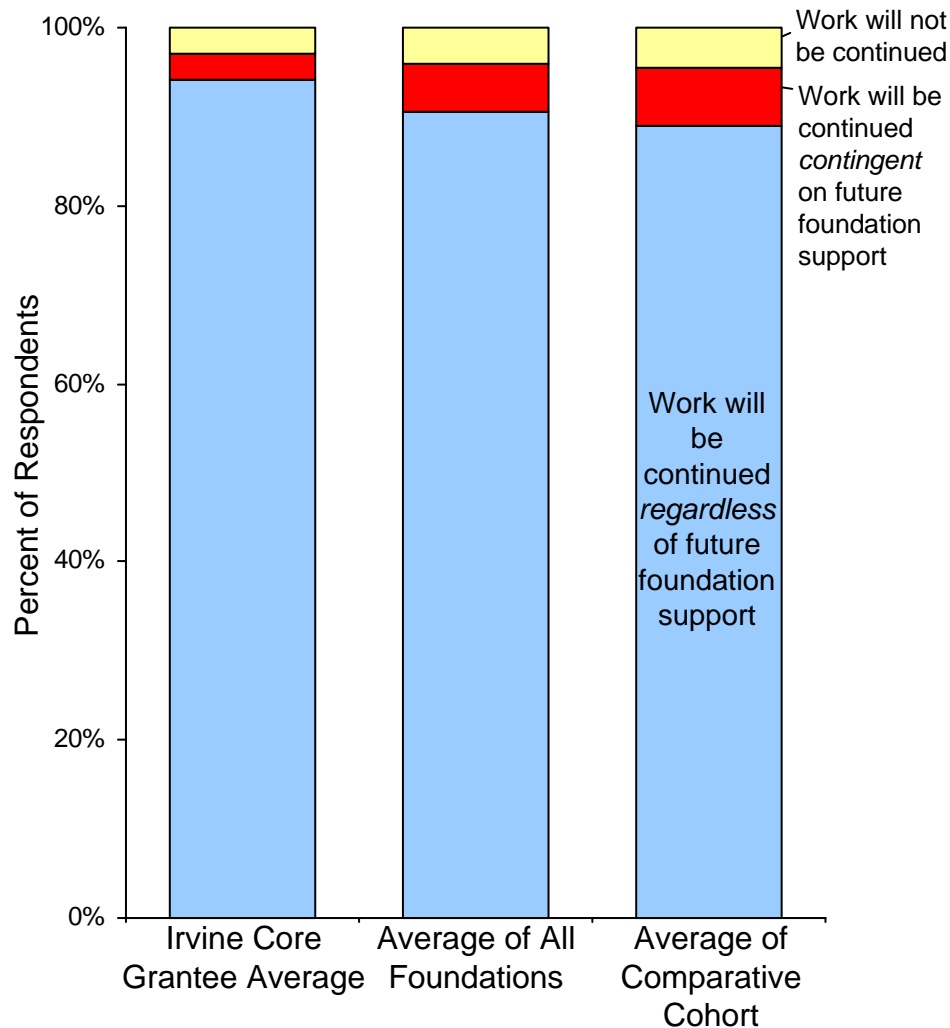
Irvine's Core grantees rate the Foundation's understanding of the population(s) they serve below the rating received by the median foundation and similar to the rating received by the median cohort foundation.



Sustainability of Funded Work

A typical proportion of Irvine Core grantees state that the work funded by their grant from the Foundation will be continued regardless of future Foundation support. Core grantees' rating of the Foundation's impact on their ability to continue their work is above the rating received by the median foundation and similar to the median cohort foundation.

Plans for Funded Work Beyond the Grant Period

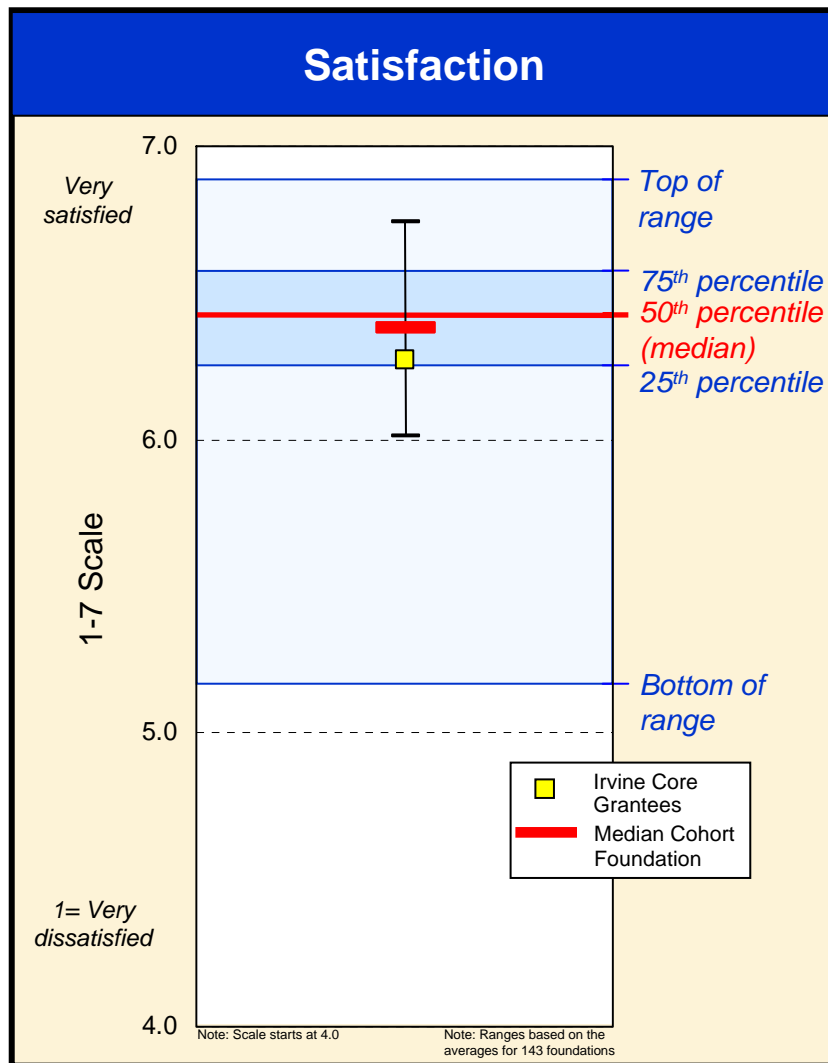


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Satisfaction

Irvine's Core grantees are less satisfied with their experience with the Foundation than grantees of the median foundation and less satisfied compared to the median cohort foundation.



Selected Grantee Comments

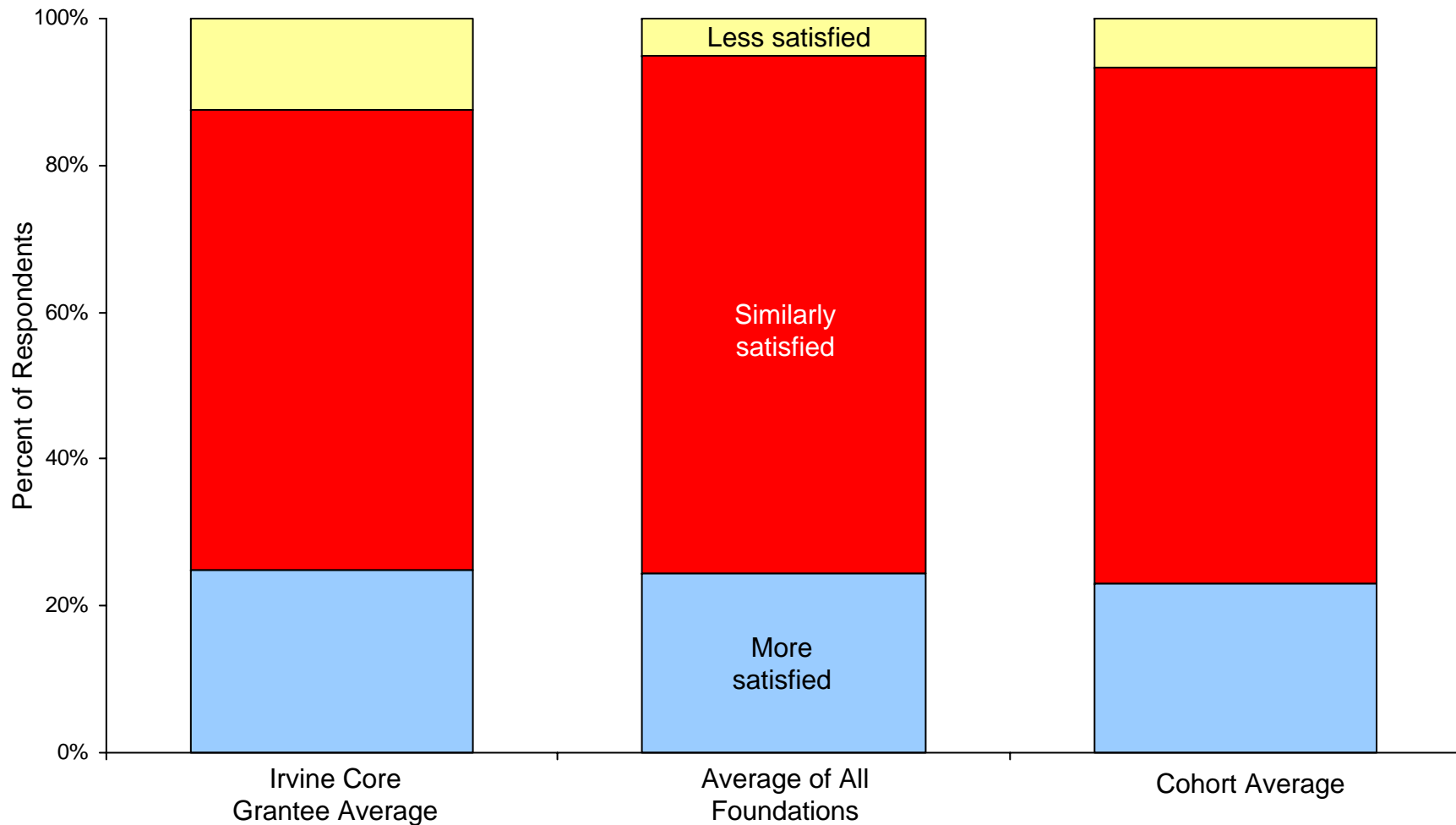
- ♦ *"The Irvine Foundation is a pleasure to work with. All the staff we've had interaction with over the years we've been a grantee have been forthcoming with clear information, helpful in addressing any challenges with the project, and a useful resource. The Foundation's ability to be flexible in its grantmaking while absolutely fulfilling its commitment to [its] mission is inspiring. I wish more foundations functioned in this manner."*
- ♦ *"[Our program officer] was horrible, and we are unlikely to apply for future funding from the Foundation because of our unpleasant experiences with [her/him]. This is a shame, because the work is valuable."*
- ♦ *"The Irvine Foundation is one of the best foundations with which to work. Everyone is extremely courteous, helpful and smart about the field. No other foundation has been as involved in our development with as much depth of understanding."*
- ♦ *"The turnover in the arts program has made it difficult to develop a real relationship and that is my reason for stating that I am less satisfied."*

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.*

Satisfaction Relative to Last Year

The majority of Irvine's Core grantees report that they are similarly satisfied with the Foundation as they were last year. A larger proportion than is typical report that they are less satisfied with the Foundation.

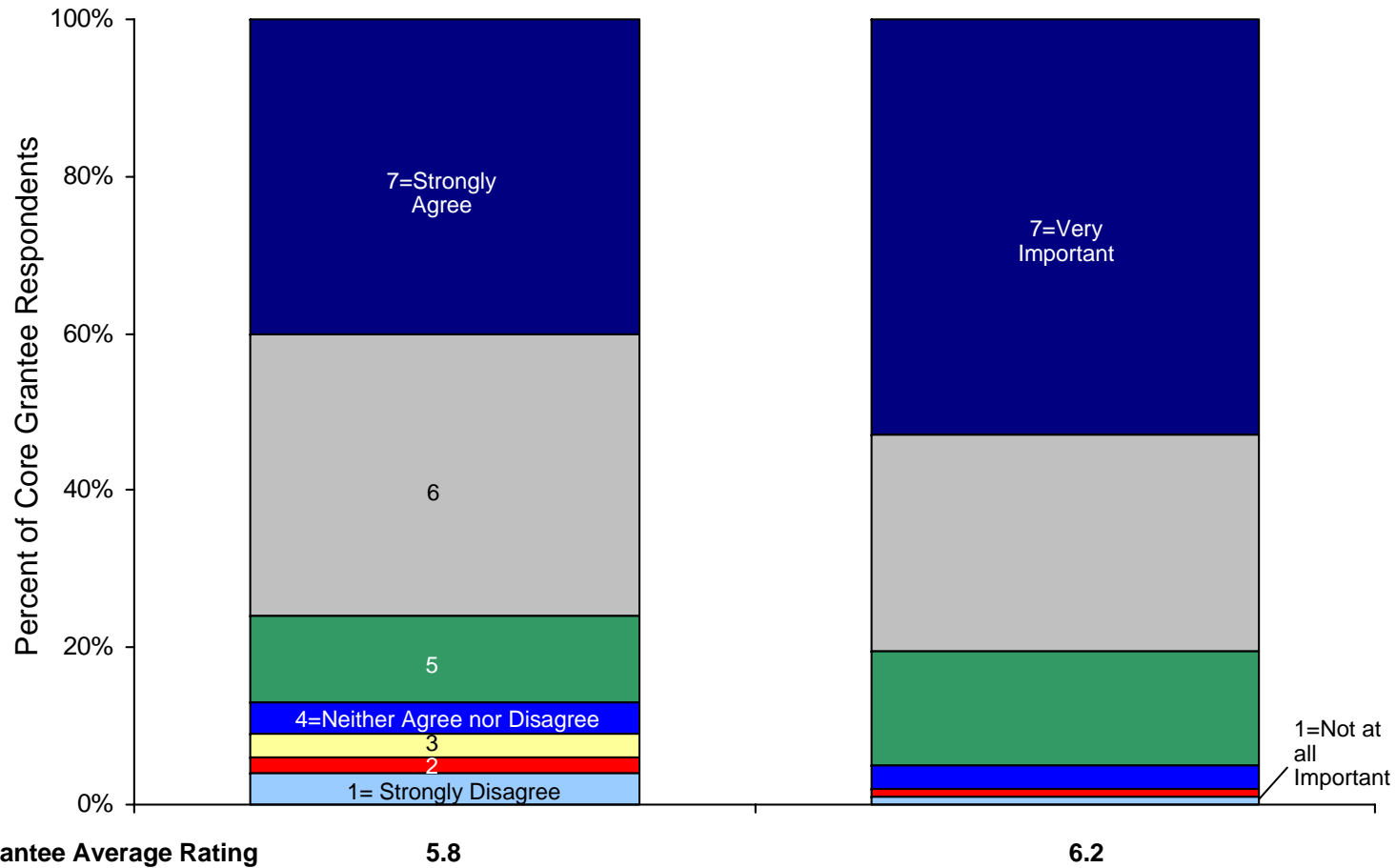
Change in Satisfaction with the Foundation from Last Year



Grantmaking Creativity

“From your experience, how much do you agree or disagree that the Irvine Foundation demonstrates creativity and innovation in its grantmaking?”¹

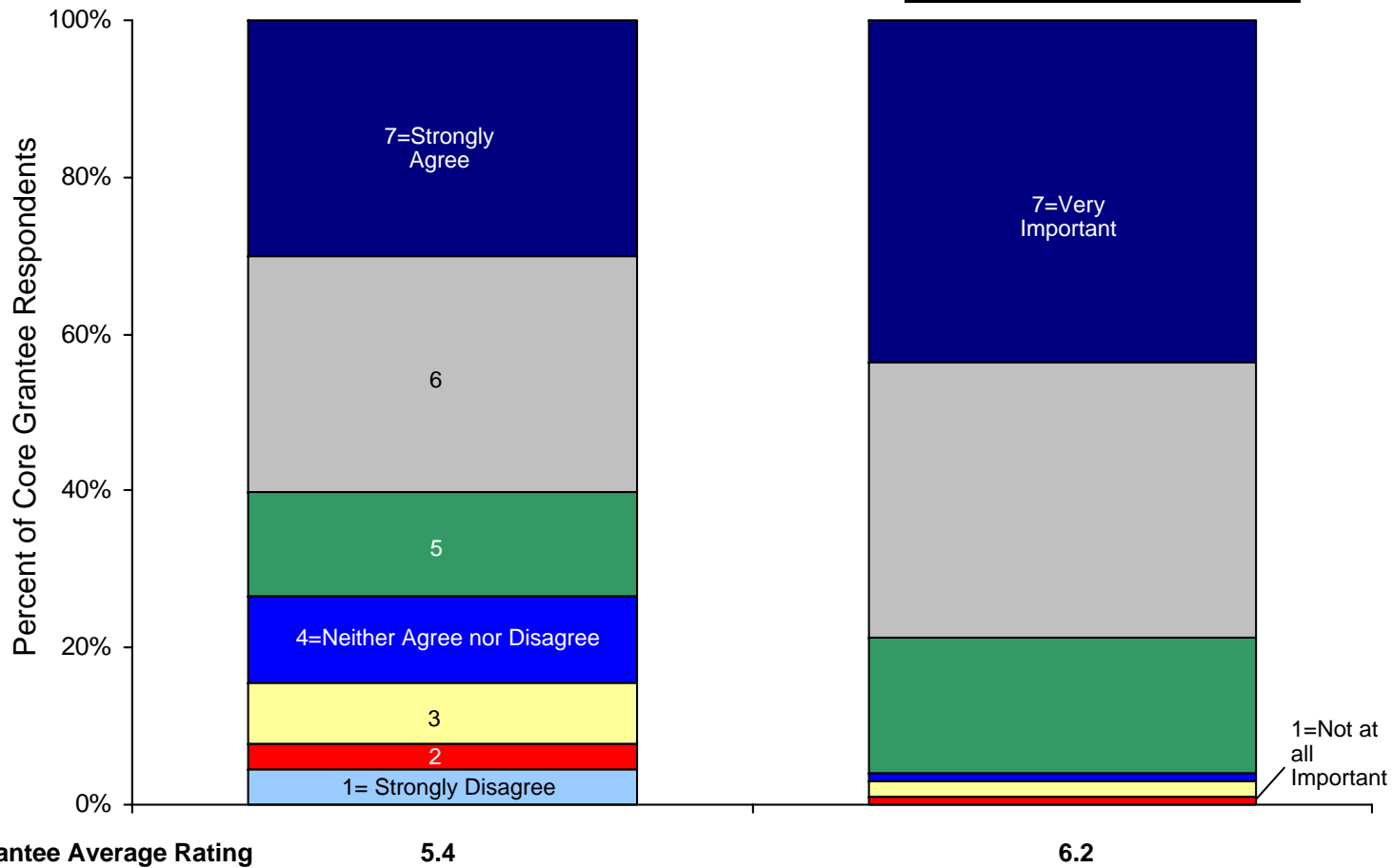
“How important is it to you that the Irvine Foundation demonstrates creativity and innovation in its grantmaking?”



Candor and Constructive Criticism

“From your experience, how much do you agree or disagree that the Irvine Foundation encourages candor and constructive criticism about its policies and programs from its grantees?”¹

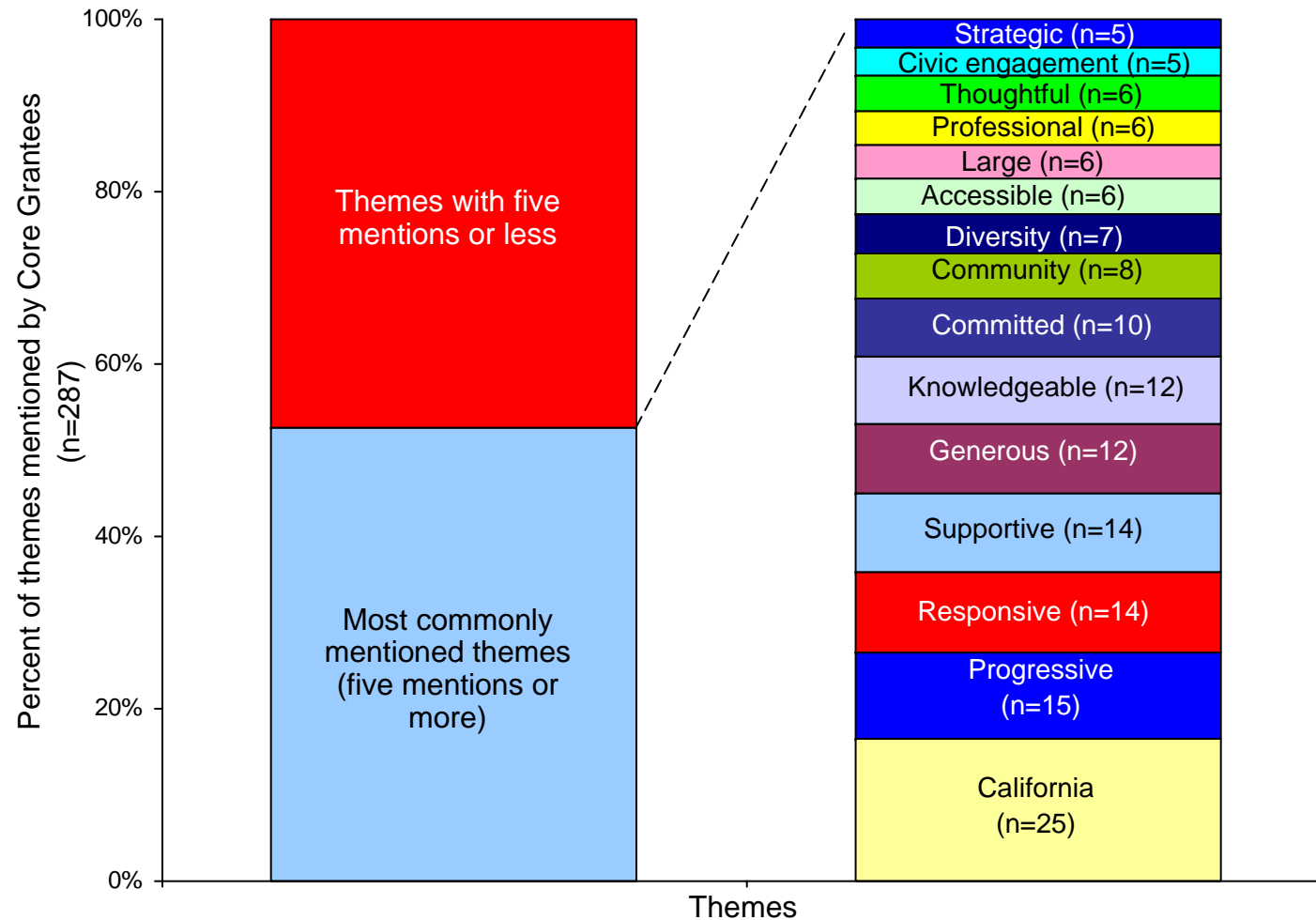
“How important is it to you that the Irvine Foundation encourages candor and constructive criticism about its policies and programs from its grantees?”



Grantee Descriptions of Foundation

Out of the 287 words or phrases Core grantees used to describe the Foundation, the most commonly mentioned themes were “California,” “progressive,” “responsive,” and “supportive.” The 15 most commonly mentioned themes are shown below.

“In your opinion, what three words or phrases best describe the James Irvine Foundation?”



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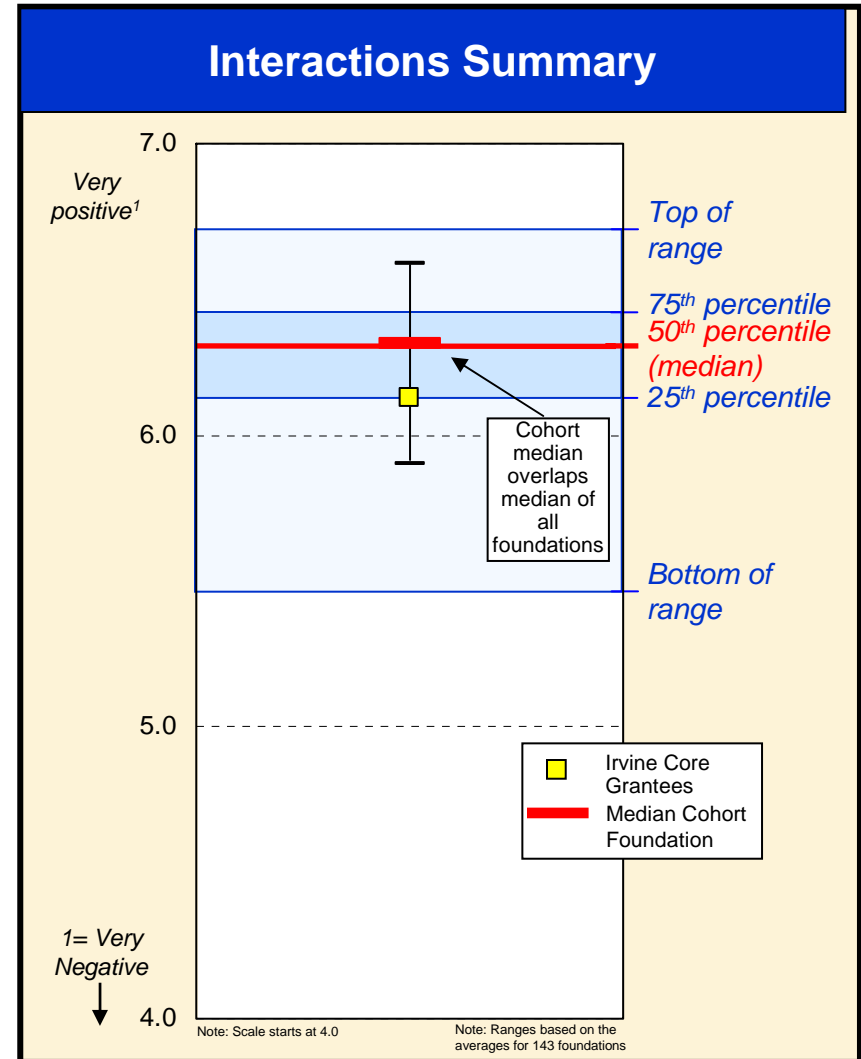
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Grantee Interactions Summary

On a composite summary measure of three aspects of interactions (listed below), Core grantees rate Irvine below the rating received by the median foundation and median cohort foundation.

This summary includes:

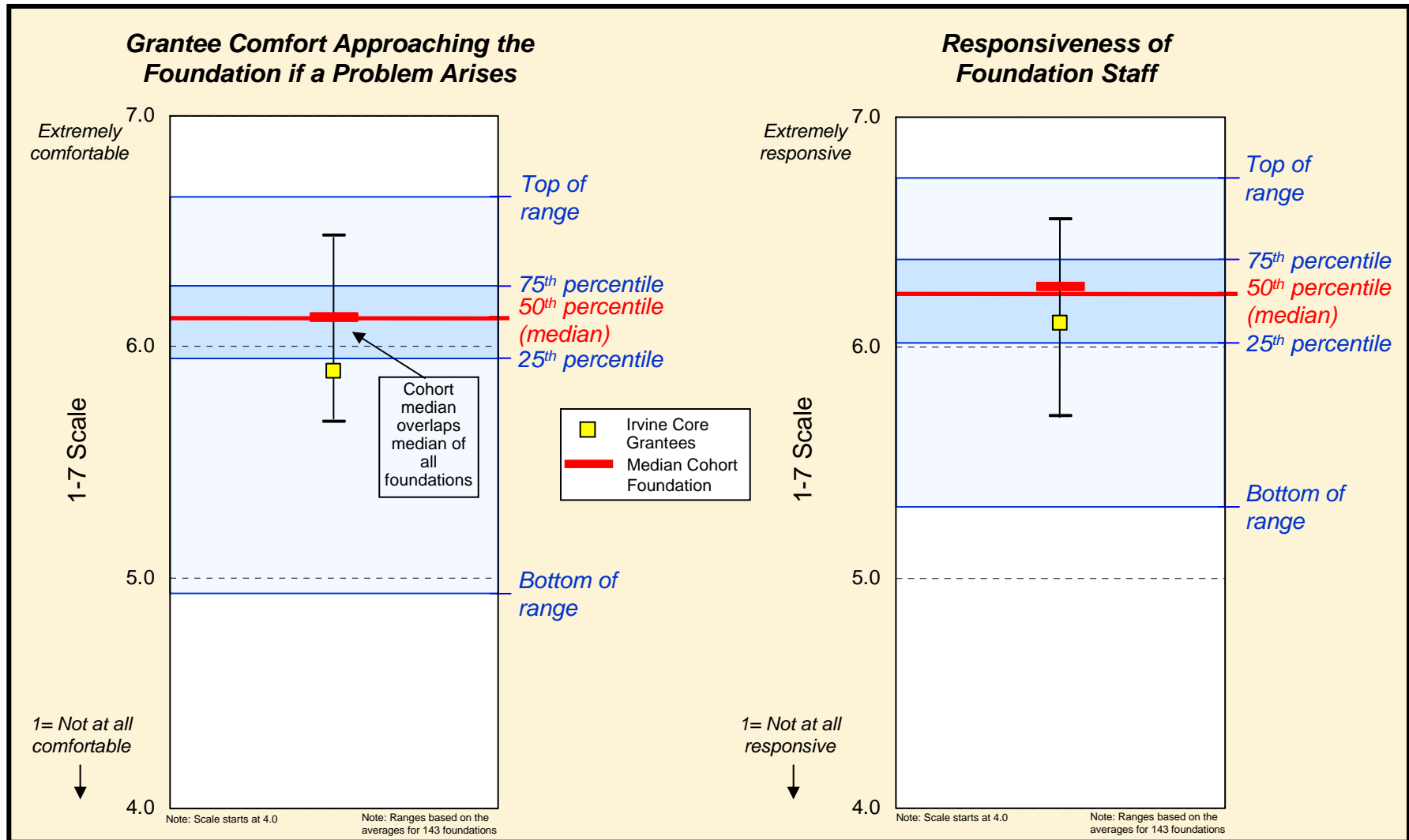
- *How comfortable grantees feel approaching the Foundation if a problem arises*
- *Responsiveness of the Foundation staff*
- *Fairness of the Foundation's treatment of grantees*



Note: Index created by averaging grantee ratings of comfort approaching the Foundation if a problem arises, responsiveness of the Foundation staff, and fairness of the Foundation's treatment of grantees – ratings which are highly correlated.

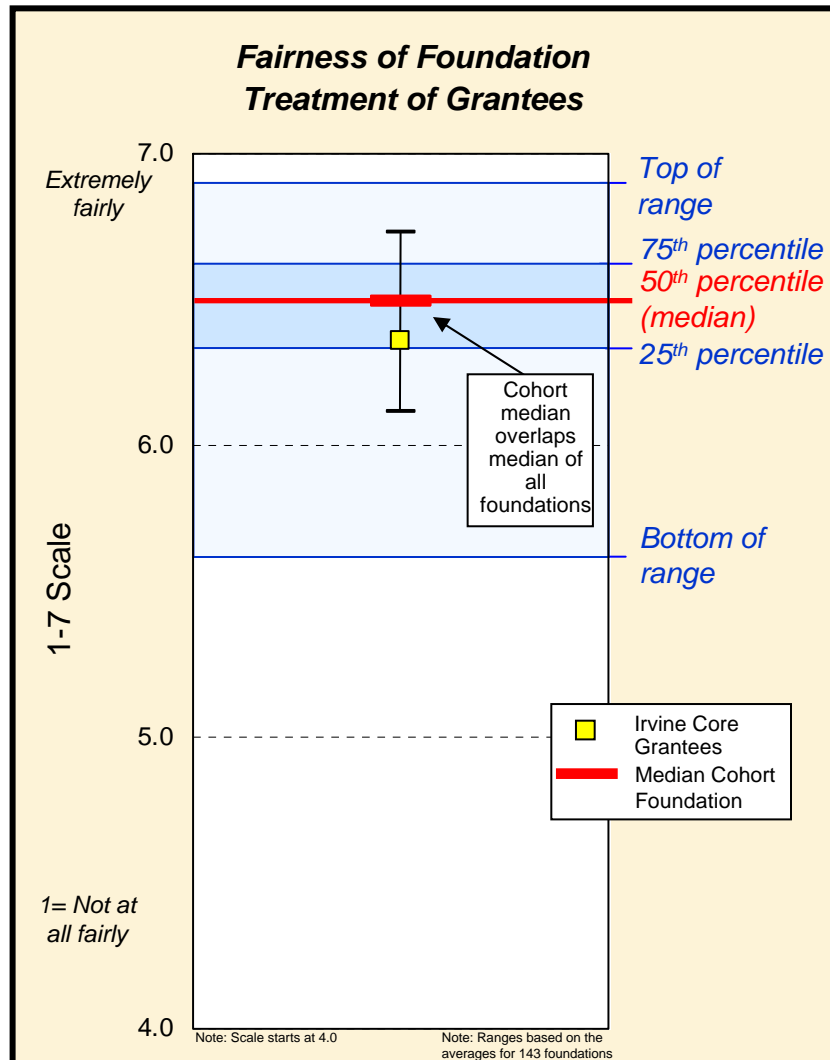
Interactions Measures (1)

Core grantees rate Irvine below the median foundation and the median cohort foundation on comfort in approaching the Foundation if a problem arises and in responsiveness of Foundation staff.



Interactions Measures (2)

Irvine grantees rate the Foundation below the ratings of the median foundation and the median cohort foundation in fairness of treatment of grantees.



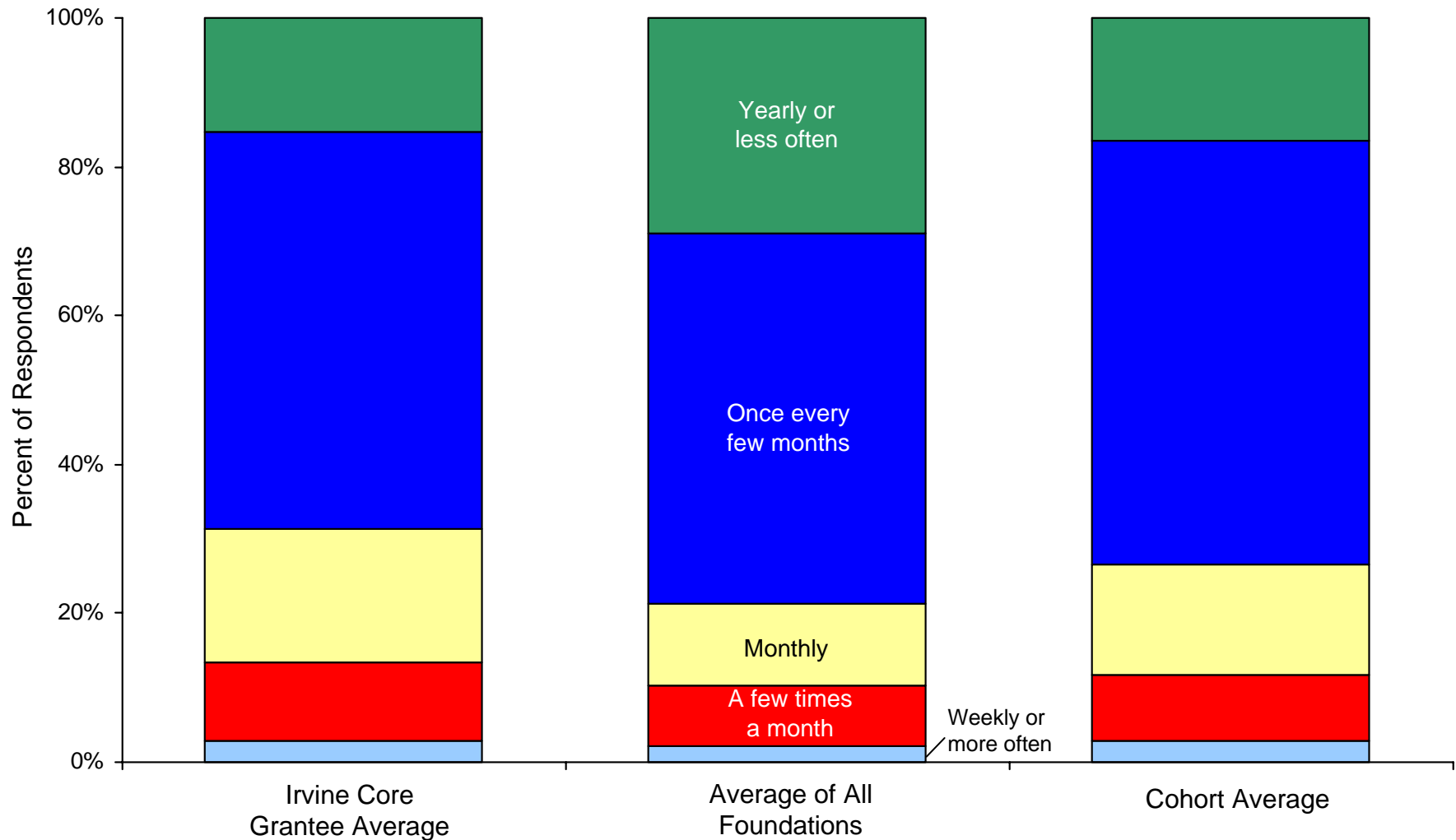
Selected Grantee Comments

- ♦ *“The Irvine Foundation has consistently been the most engaged and best informed Foundation with whom we work. The officers have felt like genuine colleagues. Even in periods of transition, the lines of communication have been open and straightforward.”*
- ♦ *“There has been a dramatic decline in the level of communication and support from Irvine staff over the past 2 years. It has also been difficult to openly discuss challenges (and opportunities) with our contacts. The greatest support has come from a hired evaluator.”*
- ♦ *“Communications are timely. Interactions are supportive and thoughtful. Program staff are extremely helpful and not pretentious.”*
- ♦ *“Program staff leadership turnover has been high during the last two years.”*
- ♦ *“I also appreciate how supportive our Program Officers are and how they are so encouraging about building our strengths and addressing our challenges.”*
- ♦ *“Communication was poor because [my program officer] decided that [s/he] did not want to talk to me anymore ... [s/he] instead continually contacts (or [her/his] subordinates contact) others on the project. This caused confusion, delay, duplication of work on our part, and was completely inappropriate.”*

Frequency of Interactions

Core grantees typically interact with their program officers once every few months or more often.

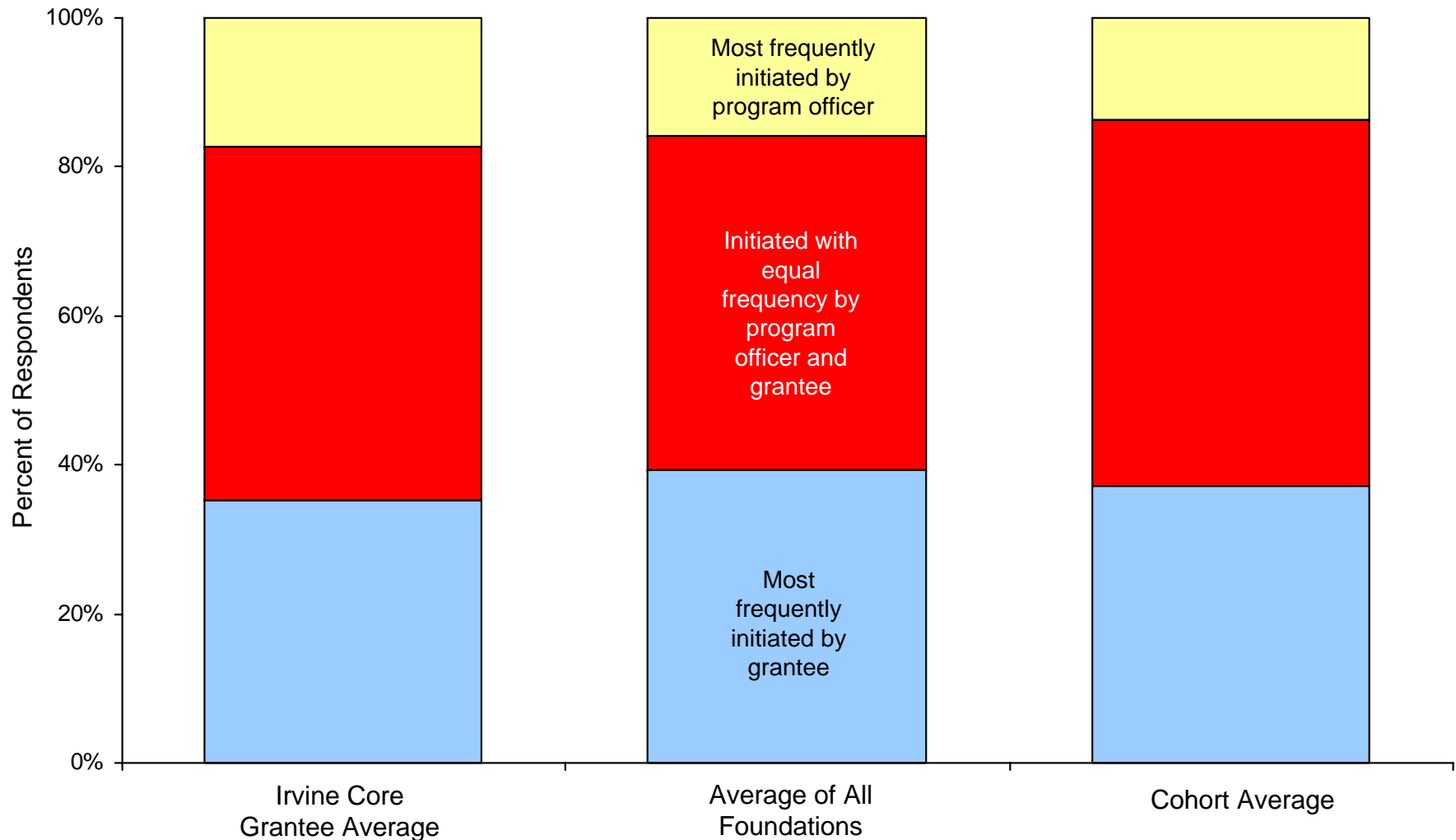
Frequency of Grantee Contact with Program Officers During Grant



Initiation of Interactions

The largest proportion of Irvine Core grantees report that interactions with Foundation staff were initiated with equal frequency by program officer and grantee, which is consistent with interactions at other foundations.

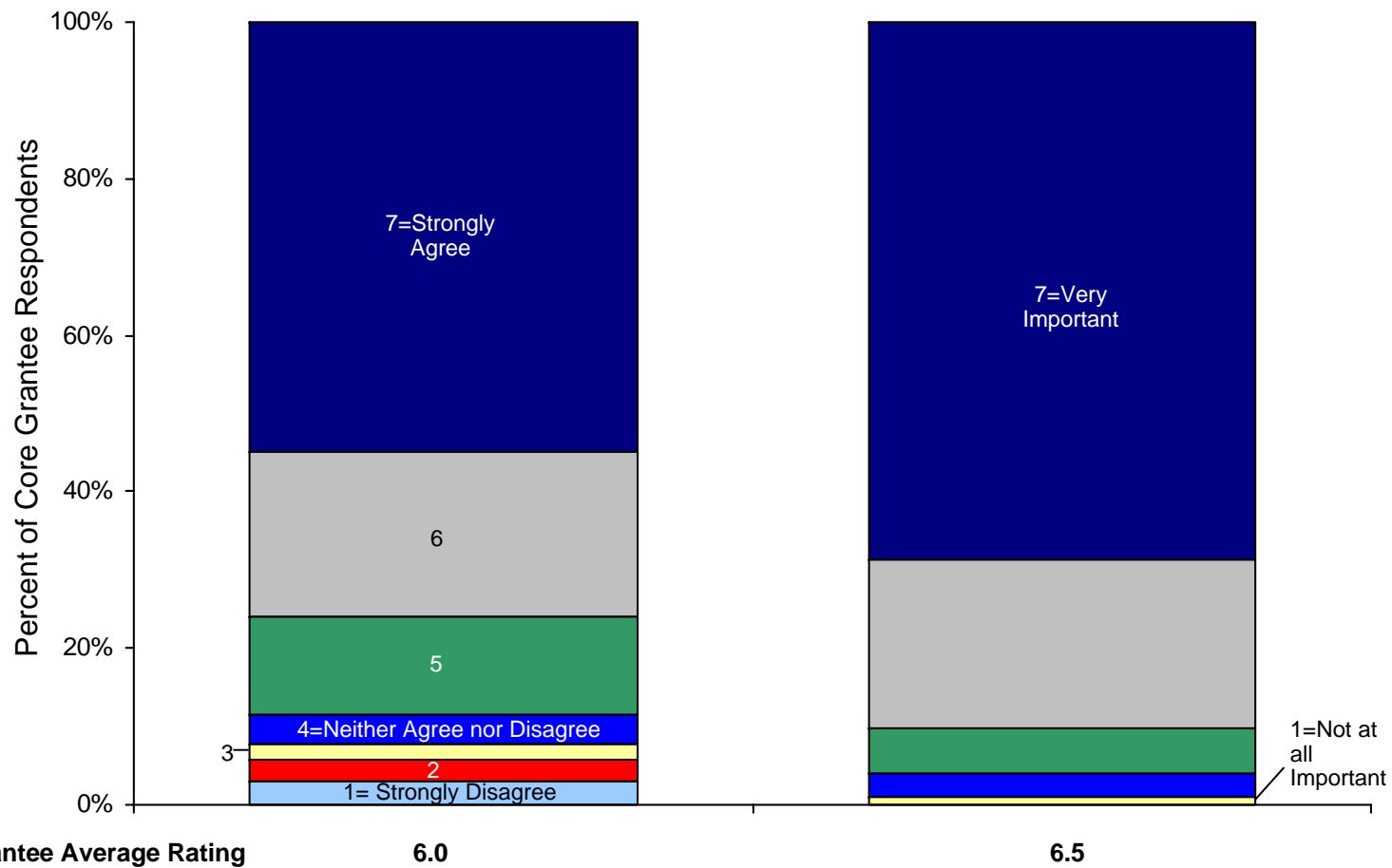
Initiation of Grantee Contact with Program Officers During Grant



Interactions with Program Staff (1)

“From your experience, how much do you agree or disagree that the Irvine Foundation has program staff who are easily accessible?”¹

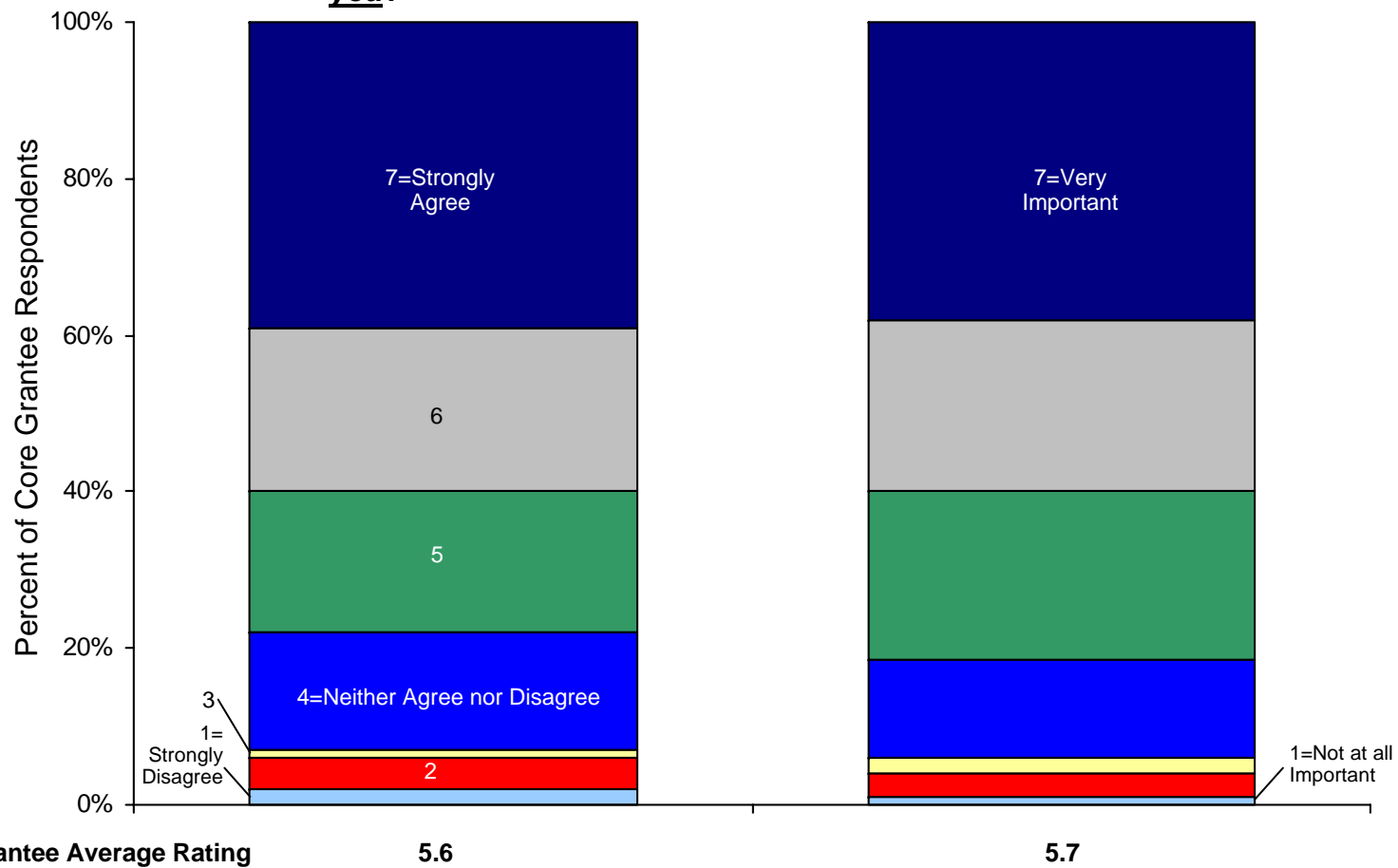
“How important is it to you that the Irvine Foundation has program staff who are easily accessible?”



Interactions with Program Staff (2)

“From your experience, how much do you agree or disagree that the Irvine Foundation has program staff who offer content expertise to you?”¹

“How important is it to you that the Irvine Foundation has program staff who offer content expertise to you?”

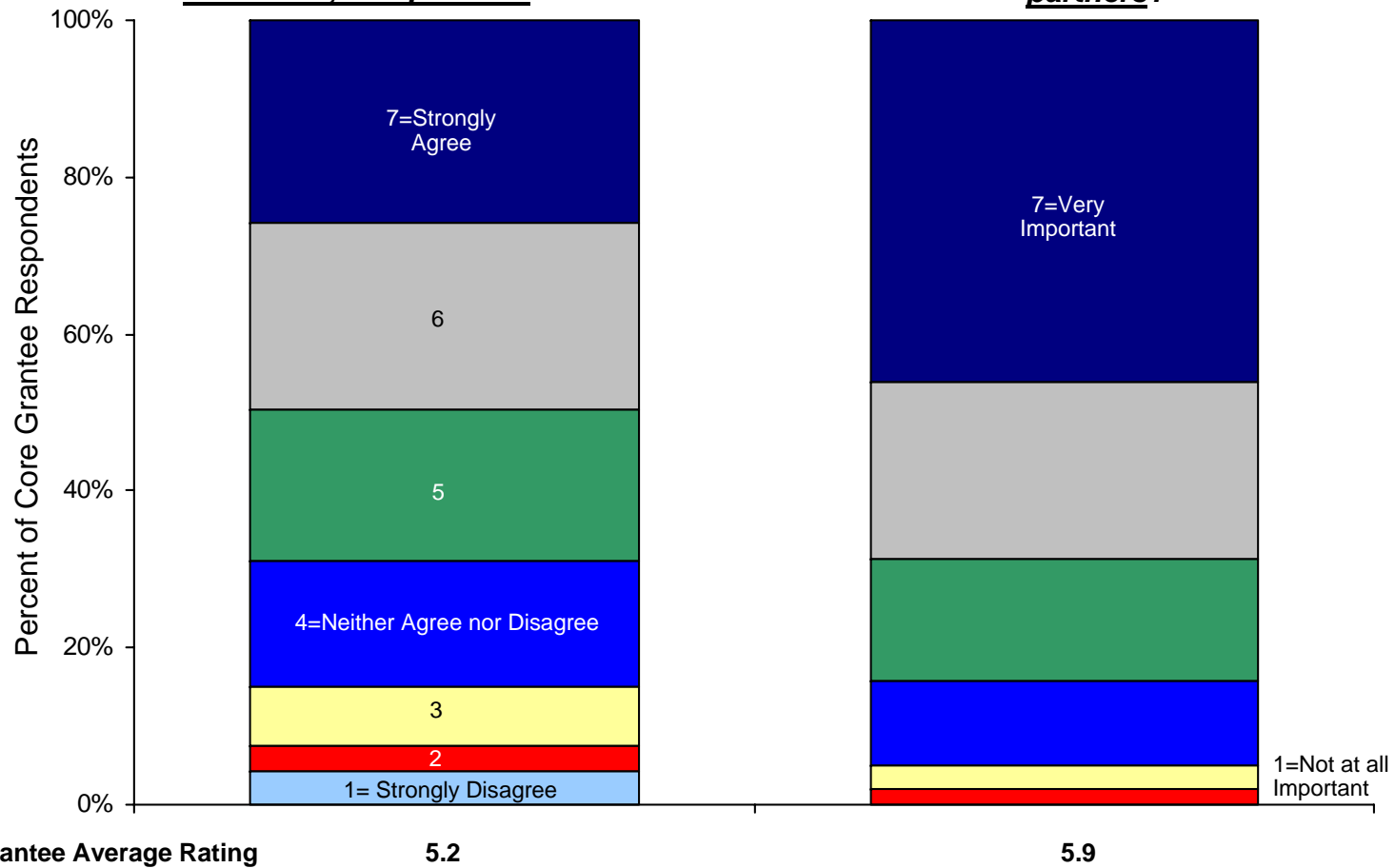


Note: No comparative data is available because these questions were only asked of Irvine grantees.
1: This question included a “don’t know” option. Three Core grantee respondents answered “don’t know.”

Interactions with Program Staff (3)

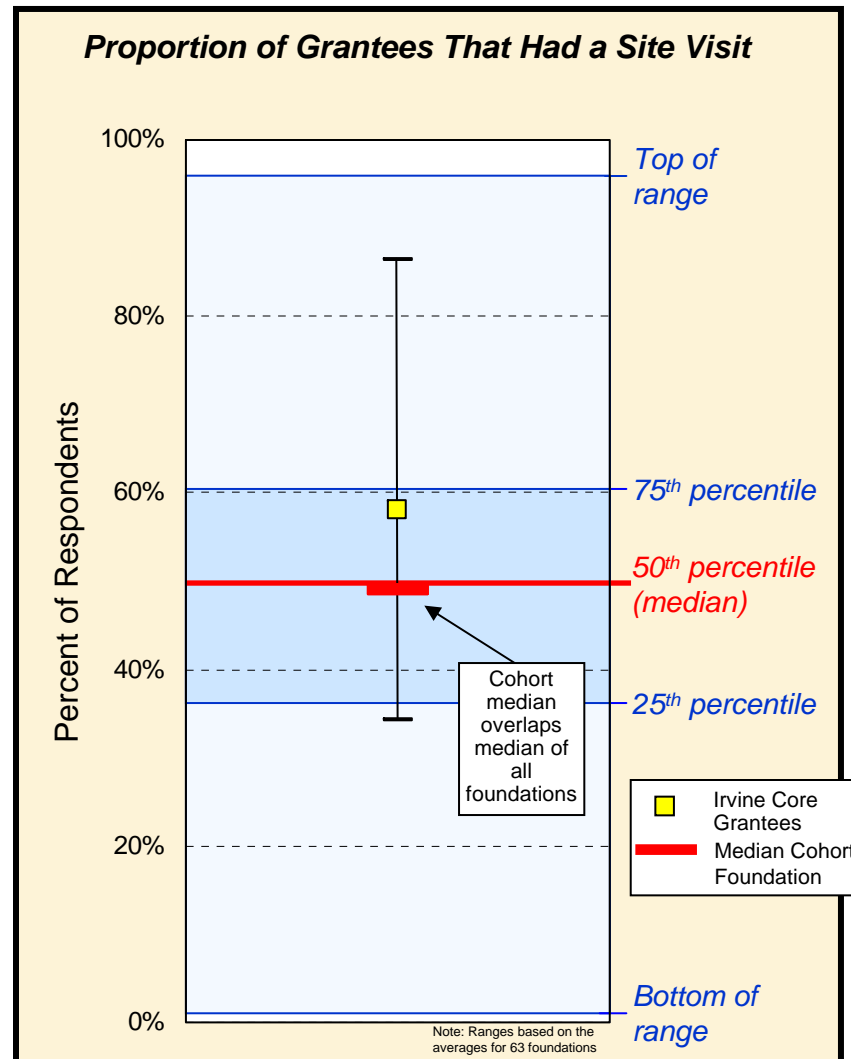
“From your experience, how much do you agree or disagree that the Irvine Foundation has program staff who link you to new opportunities, resources, and partners?”¹

“How important is it to you that the Irvine Foundation has program staff who link you to new opportunities, resources, and partners?”



Proportion of Grantees That Had a Site Visit

Fifty-eight percent of Irvine Core grantees report receiving a site visit, a larger proportion than is typical.

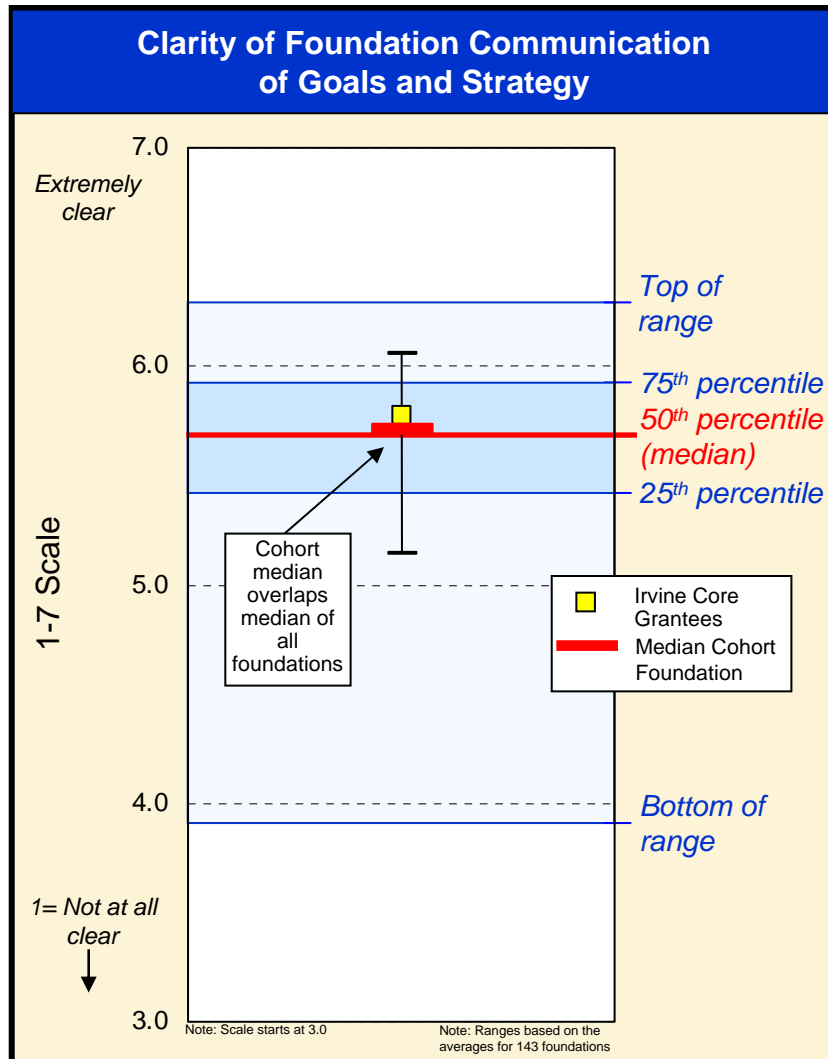


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Communication of Goals and Strategy

Core grantees rate the Foundation's clarity of communication of its goals and strategy similar to the rating of the median foundation and the median cohort foundation.



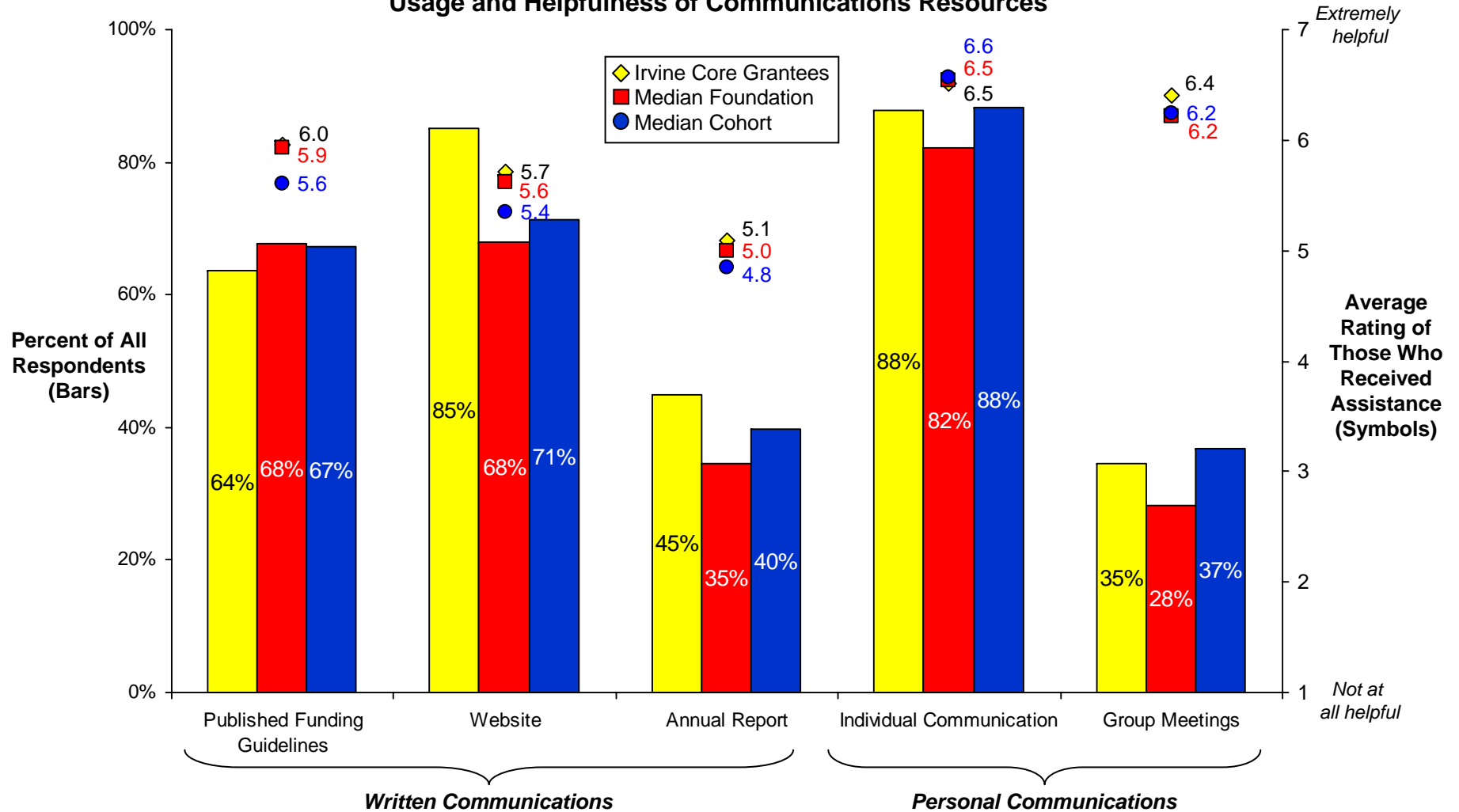
Selected Grantee Comments

- ◆ *“The quality of the Foundation's communications and processes, etc., has been exemplary. We have found the website and all publications to be consistent and helpful in guiding the grant-funded process.”*
- ◆ *“The Foundation was not ultimately effective in communicating its actual priorities, and was arbitrary, inflexible and not at all transparent ... when questions arose regarding implementation. The result was very damaging to our organization.”*
- ◆ *“In all, staff members were very forthcoming in giving us a clear understanding of the Foundation's goals and how we could help forward them.”*
- ◆ *“Better coordination of communication between program officers, assistants, and operations/accounting closer to the actual grant submission.”*
- ◆ *“Even with internal changes, the Irvine Foundation is thoroughly committed to clear communication with its grantees.”*
- ◆ *“Irvine Foundation, an otherwise well-run organization, has been challenged by frequent staff turnover in the arts program area. However, these changes and contingency plans have been well communicated and other staff have been very accessible and helpful.”*

Communications Resources

Compared to the median foundation and median cohort foundation, a larger than typical proportion of Irvine Core grantees report using the Foundation’s website and annual report to learn about the Foundation. These two resources and Irvine’s group meetings are rated above the median foundation and median cohort foundation in their helpfulness to Core grantees.

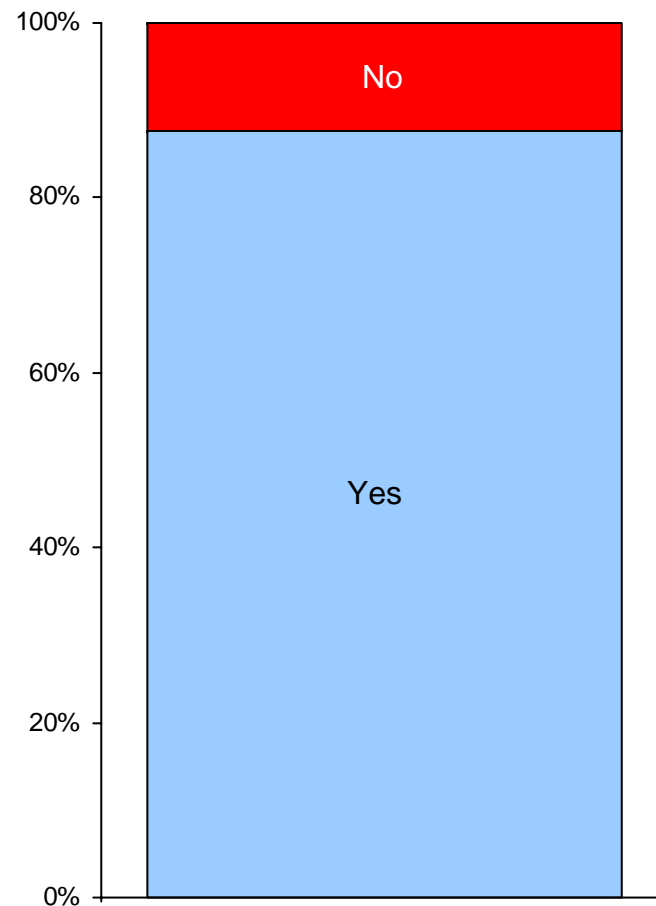
Usage and Helpfulness of Communications Resources



Communications Resources: Website (1)

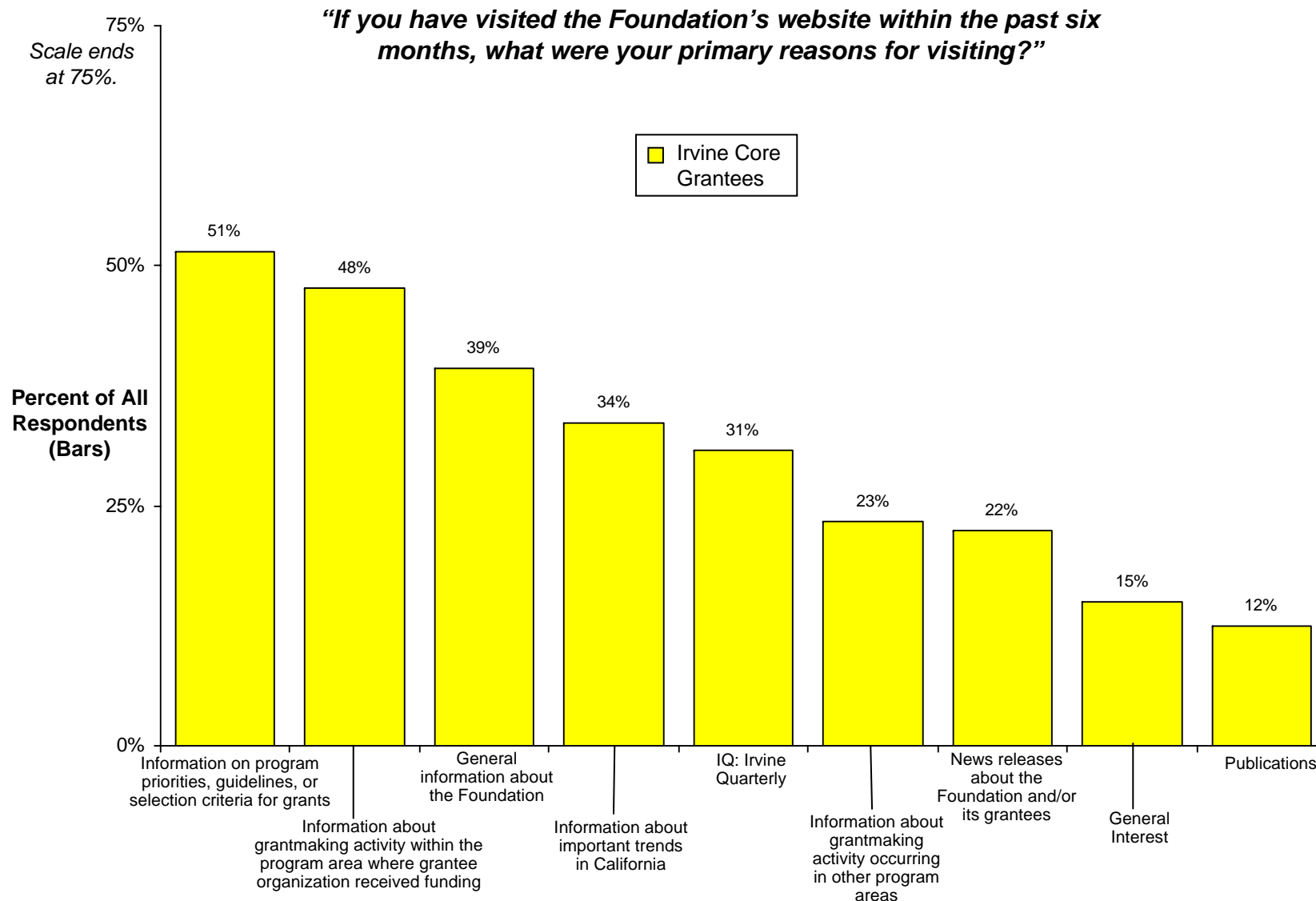
Eighty-eight percent of Irvine Core grantees have visited the Foundation's website.

"Have you visited the Foundation's Web site (www.irvine.org) in the past six months?"



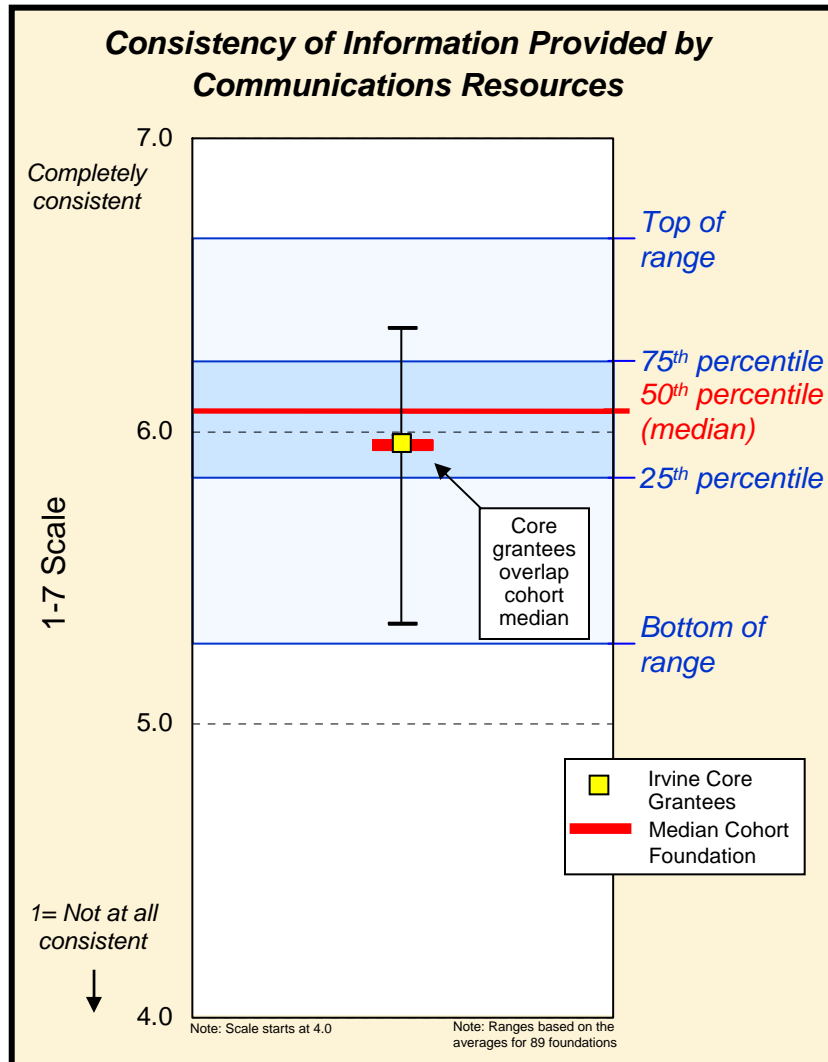
Communications Resources: Website (2)

Irvine Core grantees report most frequently visiting the Foundation's website to obtain information on program priorities, guidelines, or selection criteria for grants and to obtain information about grantmaking activity within the program areas in which their organization received funding.



Consistency of Communications

Irvine Core grantees rate the consistency of the Foundation's communications typically compared to the median foundation and the median cohort foundation.

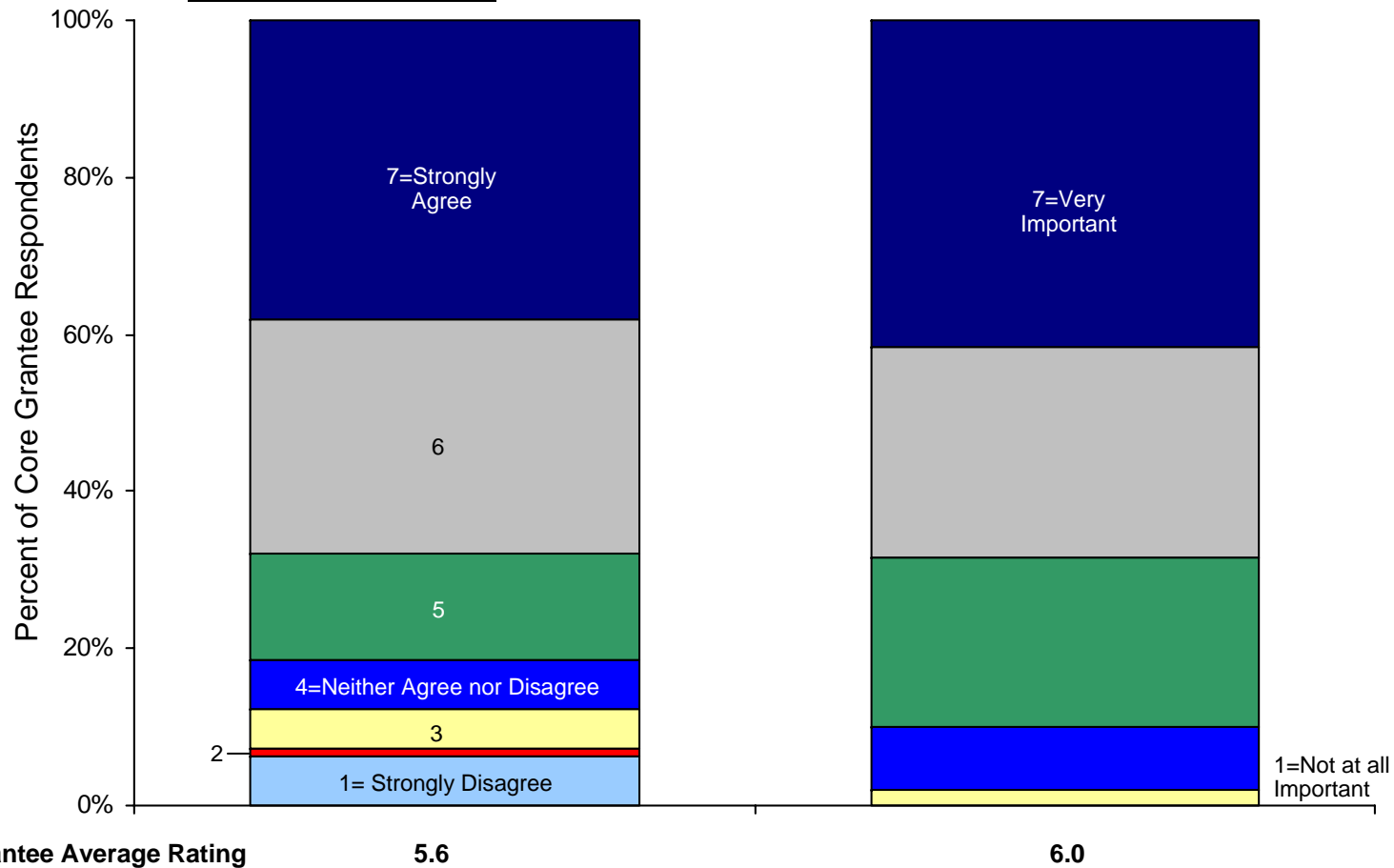


*Survey-Wide Analysis Fact: Consistency of Communications, both personal and written, is the best predictor of grantee ratings of a foundation's clarity of communication of its goals and strategy. Other predictors are 1) Quality of Interactions with Foundation Staff: fairness, responsiveness, approachability 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*.*

Transparency of Communications

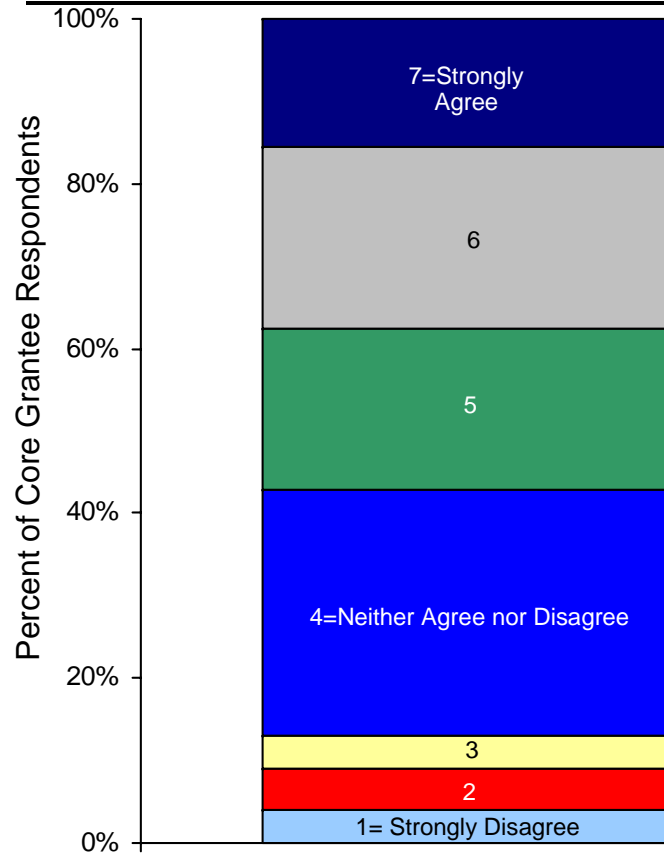
“From your experience, how much do you agree or disagree that the Irvine Foundation is transparent in how it communicates about the Foundation, including governance, financial information, and grantmaking process?”¹

“How important is it to you that the Irvine Foundation is transparent in how it communicates about the Foundation, including governance, financial information, and grantmaking process?”



Communications About Lessons Learned

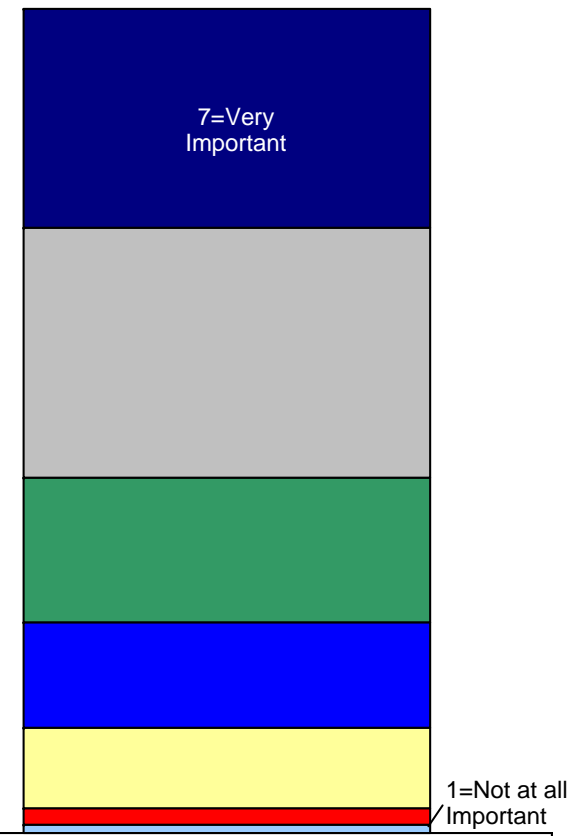
“From your experience, how much do you agree or disagree that the Irvine Foundation publicly acknowledges grantmaking strategies that have not been effective and shares lessons learned through effective communication and dissemination?”¹



Core Grantee Average Rating

4.8

“How important is it to you that the Irvine Foundation publicly acknowledges grantmaking strategies that have not been effective and shares lessons learned through effective communication and dissemination?”



5.4

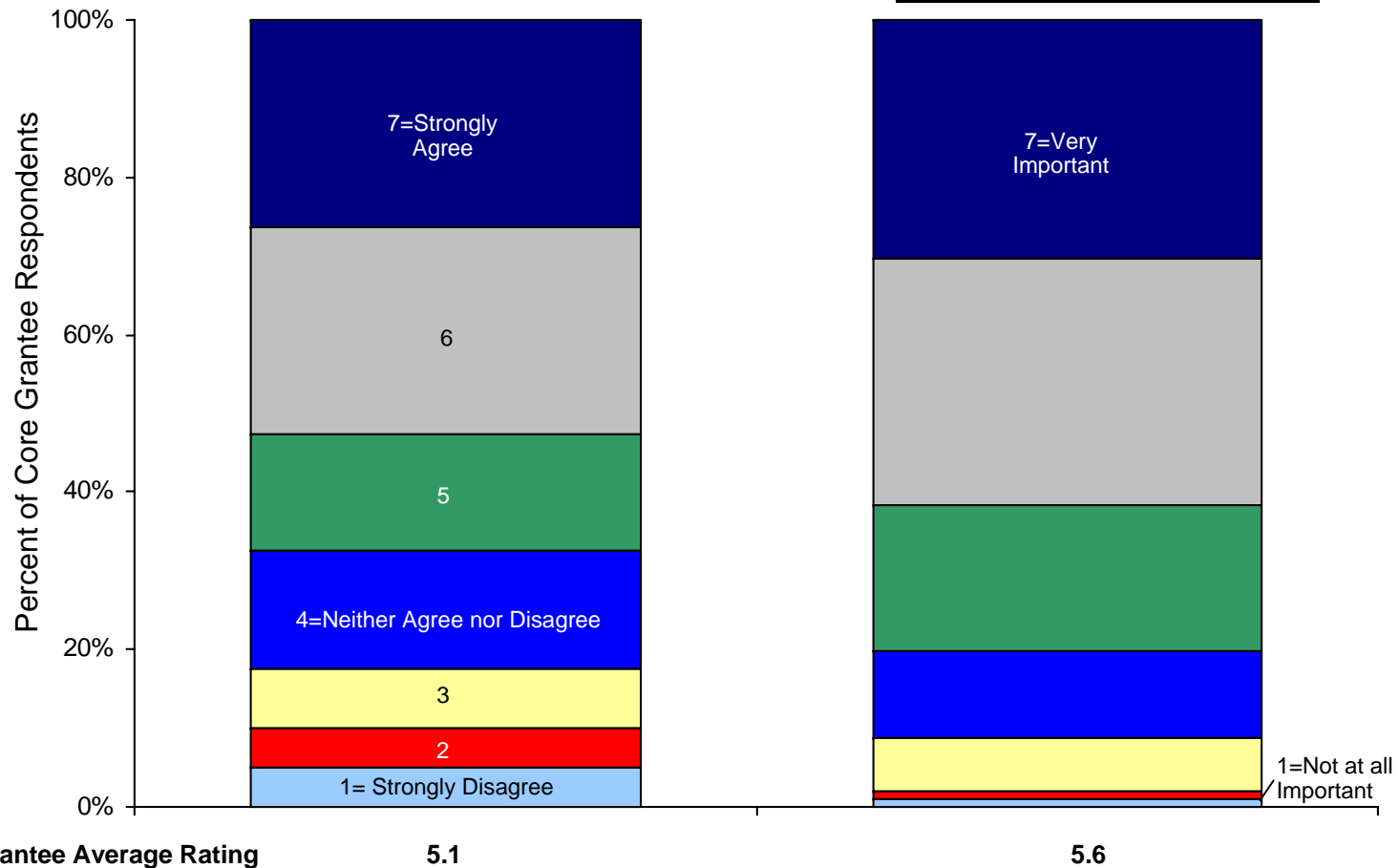
Note: No comparative data is available because these questions were only asked of Irvine grantees.

1: This question included a “don’t know” option. Twenty-six Core grantee respondents answered “don’t know.”

Irvine's Public Stance

“From your experience, how much do you agree or disagree that the Irvine Foundation takes a public stance on issues of importance to its mission and programs, even in the face of potential criticism?”¹

“How important is it to you that the Irvine Foundation takes a public stance on issues of importance to its mission and programs, even in the face of potential criticism?”



Note: No comparative data is available because these questions were only asked of Irvine grantees.
1: This question included a “don’t know” option. Twenty-two Core grantee respondents answered “don’t know.”

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Non-Monetary Assistance Summary

Irvine Core grantees rate Irvine above the median foundation and similar to the median cohort foundation on this summary of the frequency and helpfulness of assistance beyond the grant check.

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

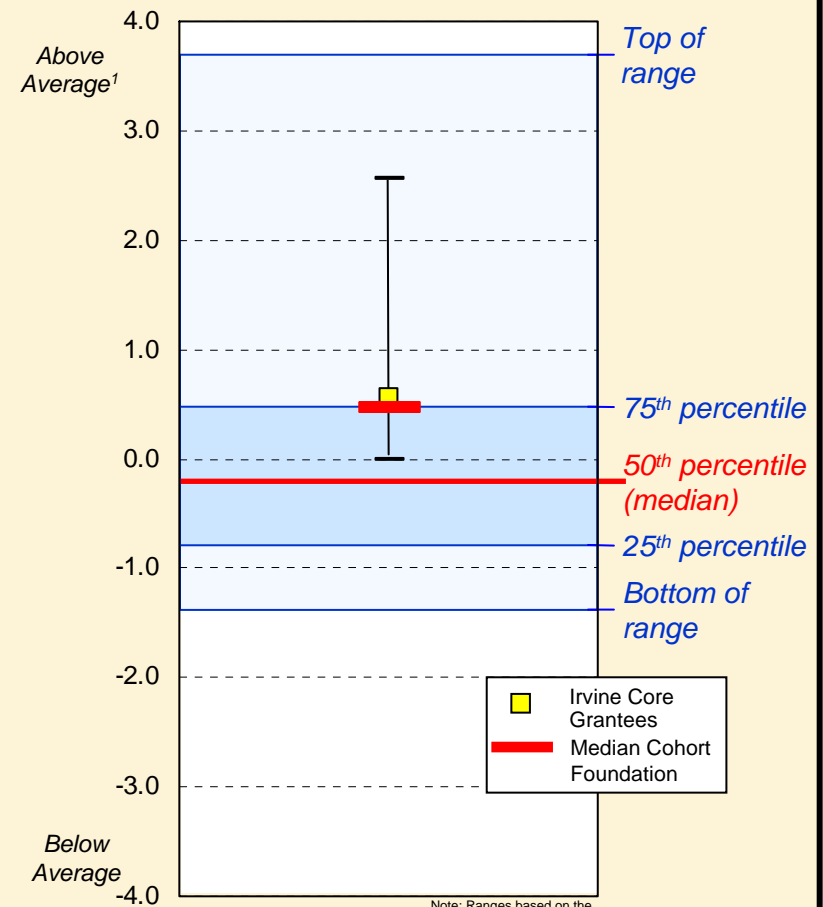
OTHER ASSISTANCE

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

This summary includes:

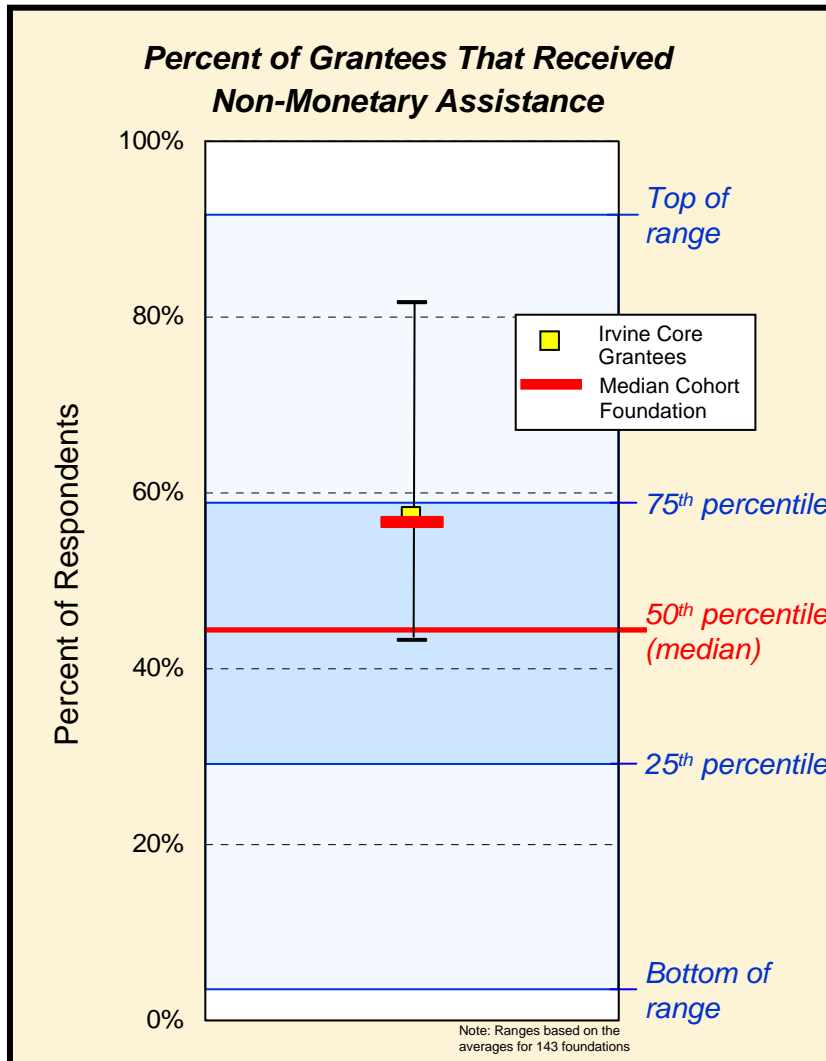
- Whether grantees received individual assistance activities from the foundation or third parties
- Ratings of helpfulness of assistance activities

Non-Monetary Assistance Summary



Non-Monetary Assistance

Fifty-seven percent of Irvine Core grantees report receiving non-monetary assistance, a larger proportion than the median foundation and a similar proportion as the median cohort foundation.



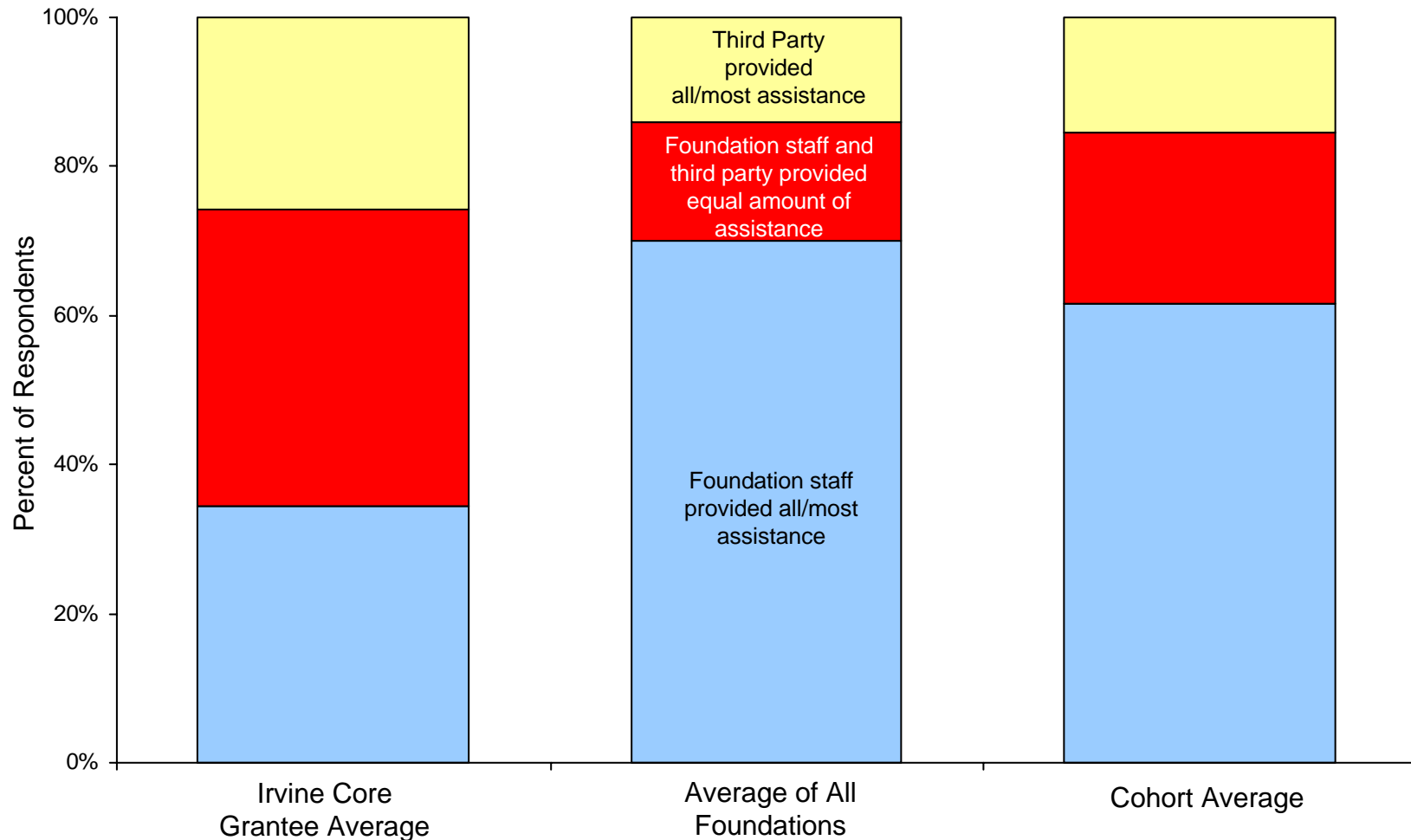
Selected Grantee Comments

- ◆ *“The technical assistance provided is of equal, if not greater, importance than the monetary assistance. Irvine has connected us with nationally recognized consultants to whom we would not have had access. This assistance is having a major impact on the capacity and strategic direction of the organization.”*
- ◆ *“We received little or no non-monetary support.”*
- ◆ *“Consulting team has been extremely helpful in the development of our foundation.”*
- ◆ *“Training provided was excellent.”*
- ◆ *“Foundation provided advice, communications assistance and general support.”*
- ◆ *“They provided funding ... board development and marketing. All three have been extremely helpful and have had a very material effect on our organization.”*

Who Provided Non-Monetary Assistance

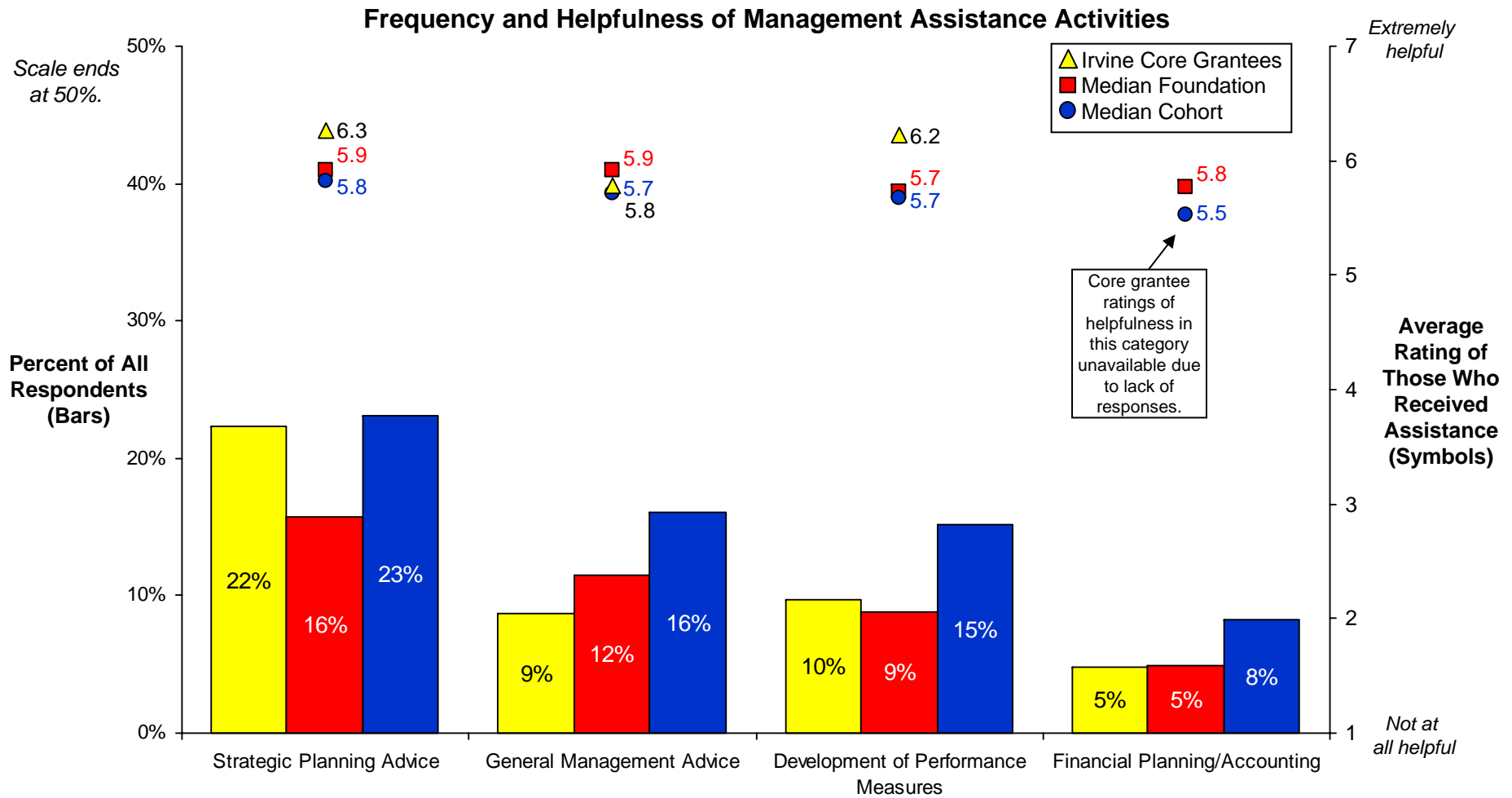
A greater than typical proportion of Core grantees report that Foundation staff and a third party provided an equal amount of the assistance they received or that a third party provided all or most of the assistance. A smaller proportion than is typical report that Foundation staff provided all or most of their non-monetary assistance.

Who Provided Non-Monetary Assistance



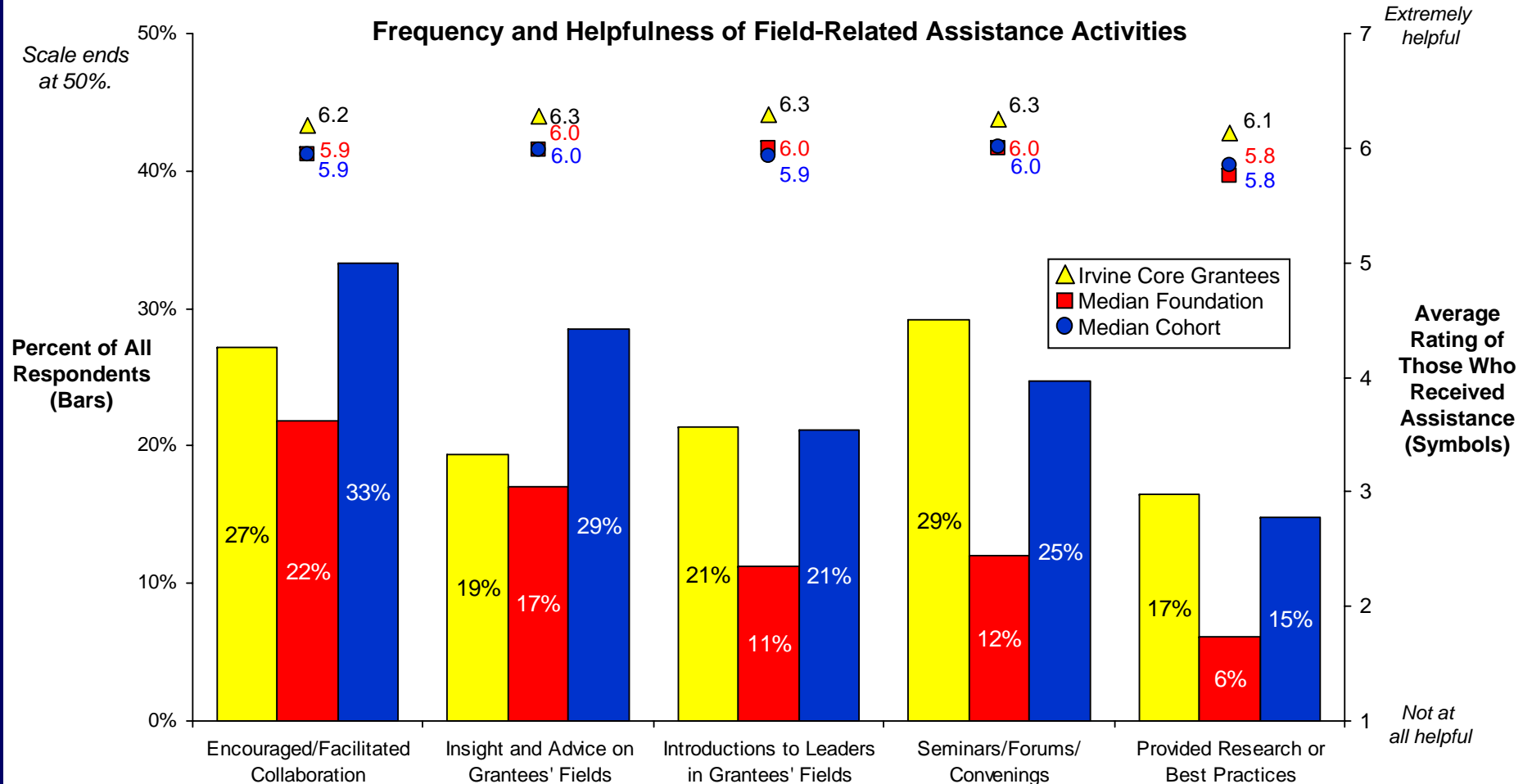
Management Assistance Activities & Helpfulness

A larger proportion of Core grantees report receiving strategic planning advice and a smaller proportion report receiving general management advice compared to grantees of the median foundation. Irvine Core grantees receive a smaller proportion of all the activities below compared to the median cohort foundation. The helpfulness of strategic planning advice and development of performance measures is rated above the ratings received by the median foundation and median cohort foundation.



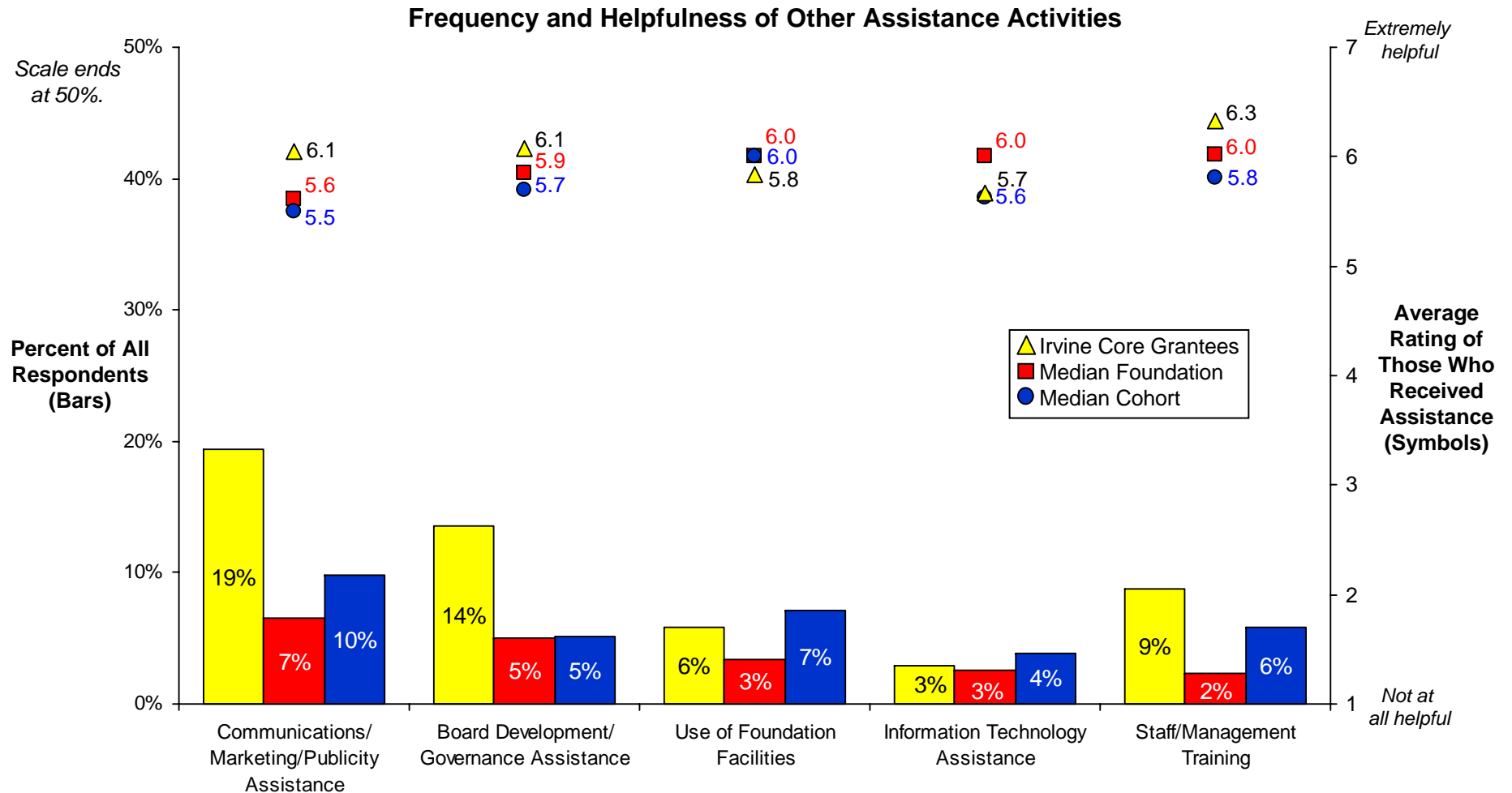
Field-Related Assistance Activities & Helpfulness

Compared to the median foundation, Core grantees receive a greater proportion of all the types of assistance activities listed below. A larger than typical proportion of Core grantees are provided seminars/forums/convenings and research or best practices compared to the median cohort foundation. The helpfulness of these activities is consistently rated above the activities provided by the median foundation and median cohort foundation.



Other Support Activities & Helpfulness

Irvine provides a larger than typical proportion of Core grantees with communications/marketing/publicity assistance, board development/governance assistance, and staff/management training. The helpfulness of these three support activities are rated above the activities provided by the median foundation and the median cohort foundation.

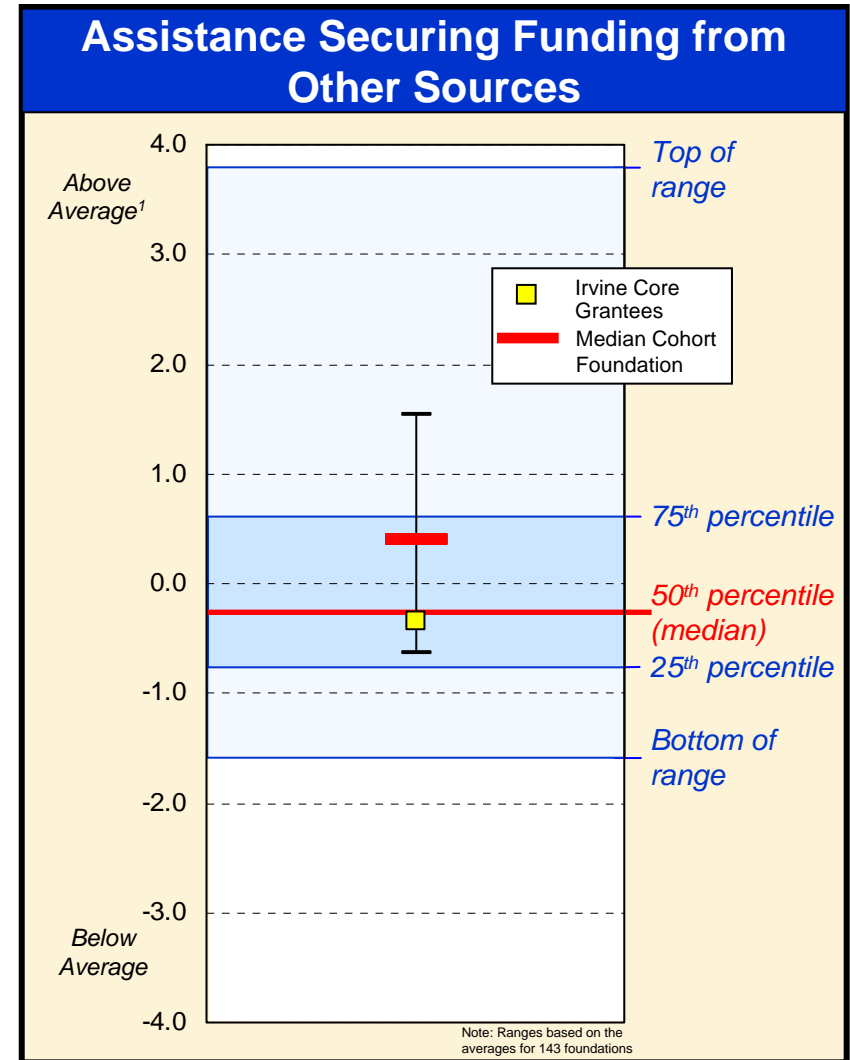


Assistance Securing Funding from Other Sources

Core grantees rate Irvine similar to the median foundation and below the median cohort foundation on this summary of the frequency and helpfulness of a foundation's assistance in obtaining funding from other sources.

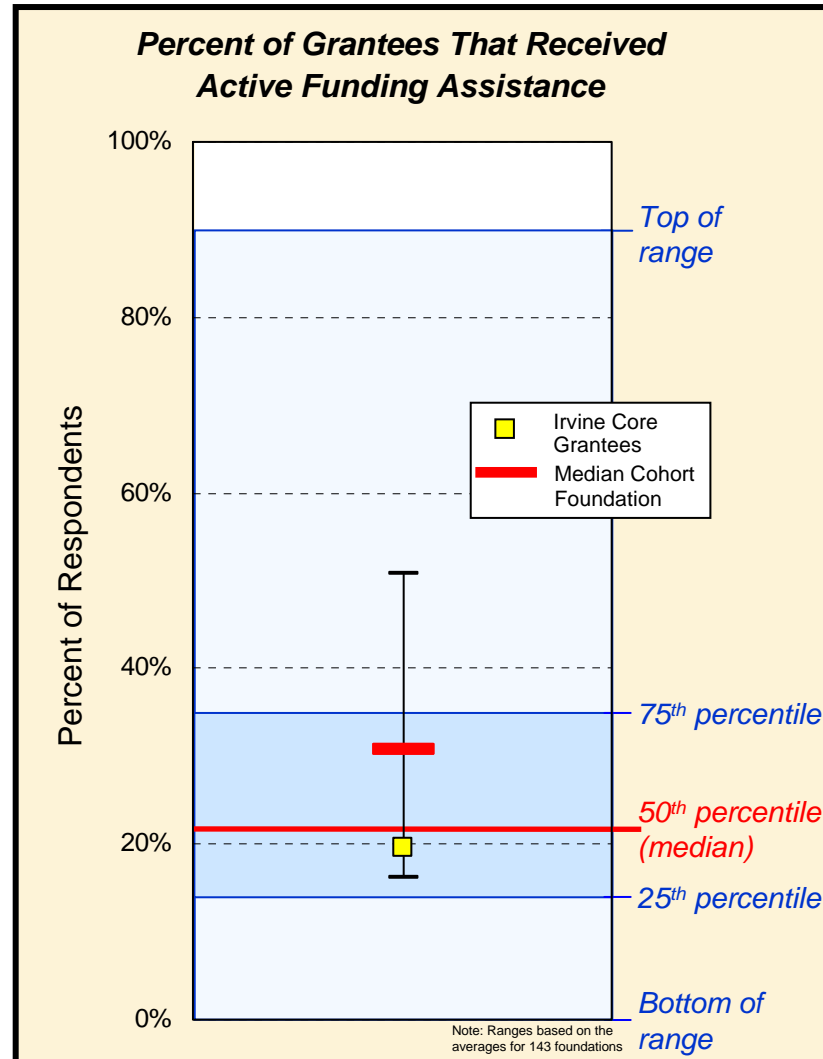
This summary includes:

- *Frequency of active foundation assistance in obtaining additional funding from other sources*
- *The impact of those efforts*



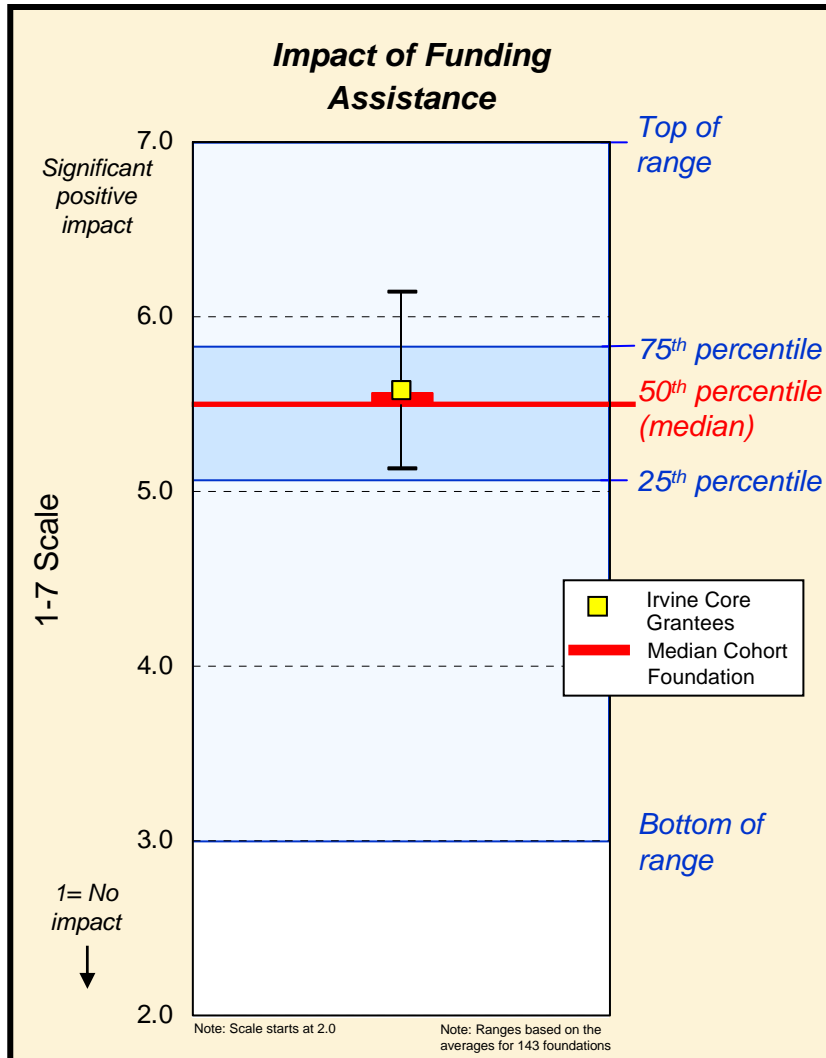
Proportion of Grantees Receiving Funding Assistance

A typical proportion of Core grantees receive active funding assistance from the Foundation as the median foundation and a smaller proportion receive assistance compared to the median cohort foundation.



Impact of Funding Assistance

Core grantees rate the impact of Irvine's funding assistance similar to the rating received by the median foundation and the median cohort foundation.



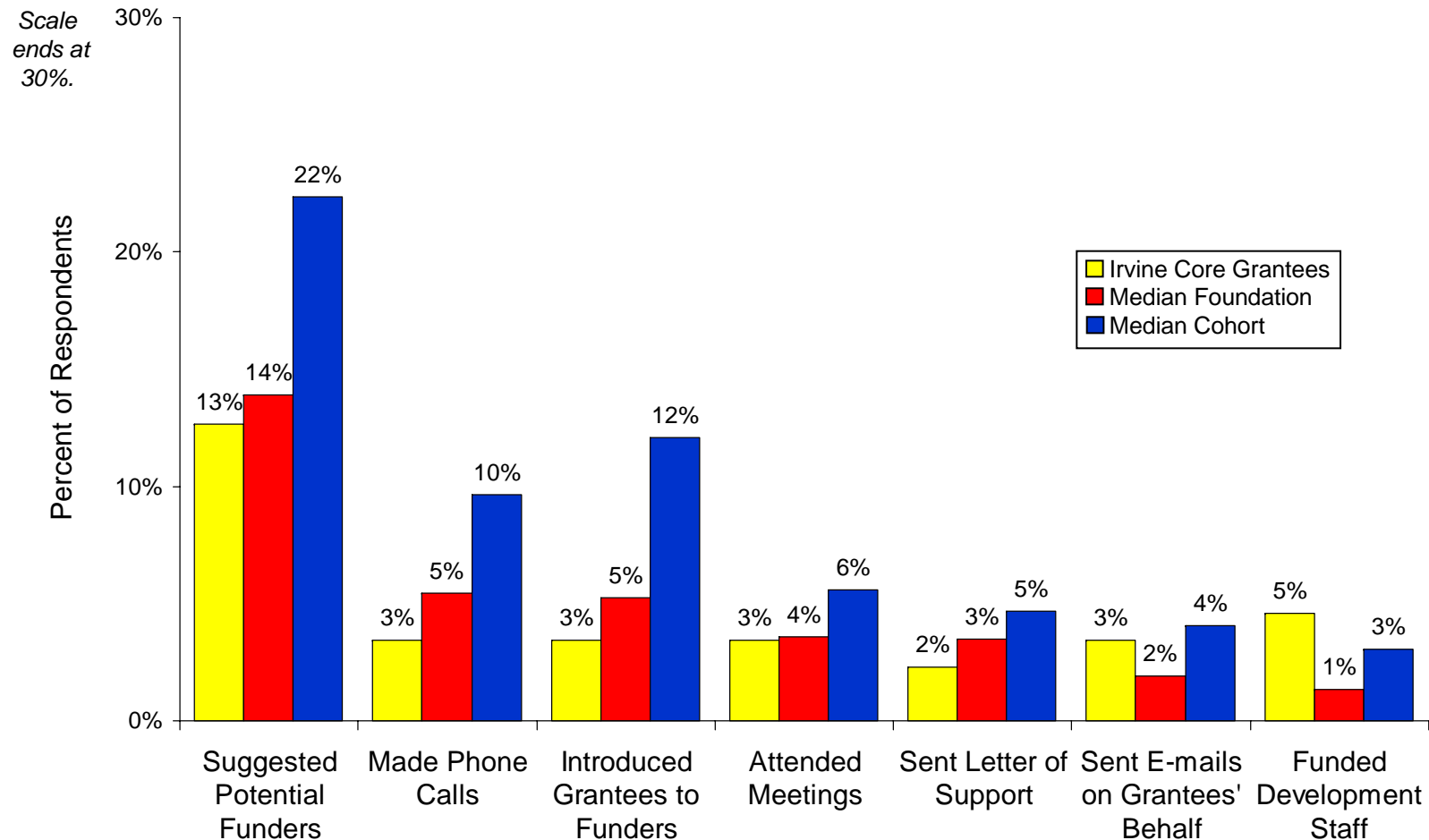
Selected Grantee Comments

- ◆ “These funds allowed us to leverage other funds for innovative initiatives that are typically more difficult to support.”
- ◆ “The name value is great, though it's impossible to quantify impact. Been disappointed that there has been little active support in leveraging this one time grant.”
- ◆ “Our Irvine grant opened new vistas, and continues to create opportunities for us; a major foundation just matched Irvine's funds, a full two years after our Irvine grant period began. So our Irvine grant remains a source of inspiration.”

Frequency of Funding Assistance

Irvine funds development staff for a larger proportion of Core grantees than is typical. In general, Core grantees receive a smaller amount of assistance securing funding from other sources than at the median cohort foundation.

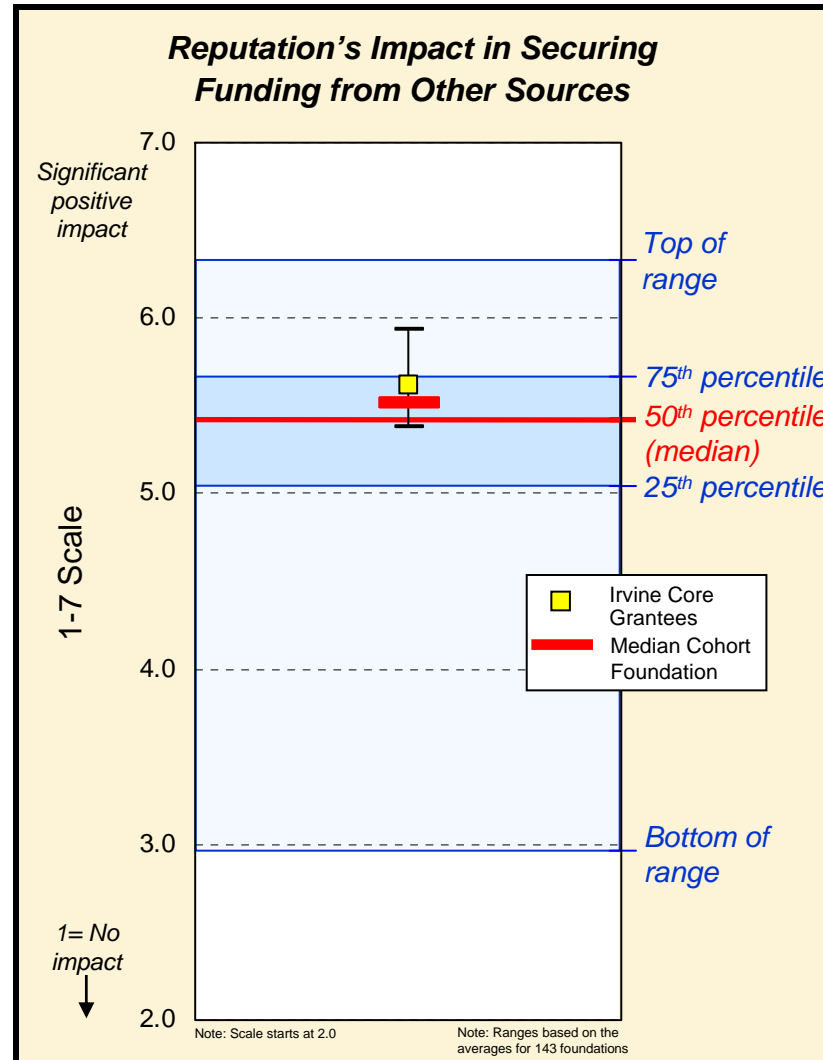
*Activities Provided by the Foundation
to Assist in Obtaining Funding From Other Sources*



Note: This chart includes data about 143 foundations, with the exception of two categories: "funded development staff" includes data about 89 foundations, and "sent e-mails on grantees' behalf" includes data about 38 foundations.

Impact of Reputation in Funding Assistance

Irvine grantees rate the impact of the Foundation's reputation in securing funding from other sources above the ratings received by the median foundation and similar to the median cohort foundation.

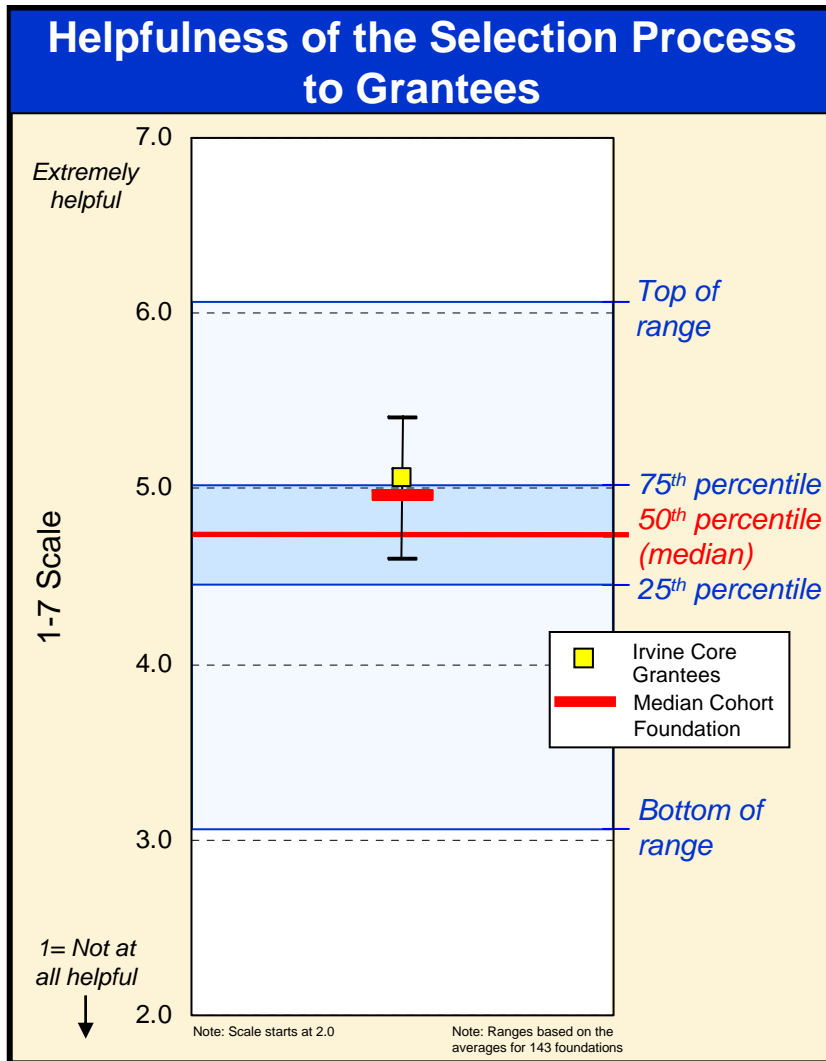


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Helpfulness of Selection Process

Participating in the Foundation’s selection process is seen to be more helpful in strengthening the grantee compared to the process of the median foundation. Irvine Core grantees rate the helpfulness of the selection process similarly to grantees at the median cohort foundation.



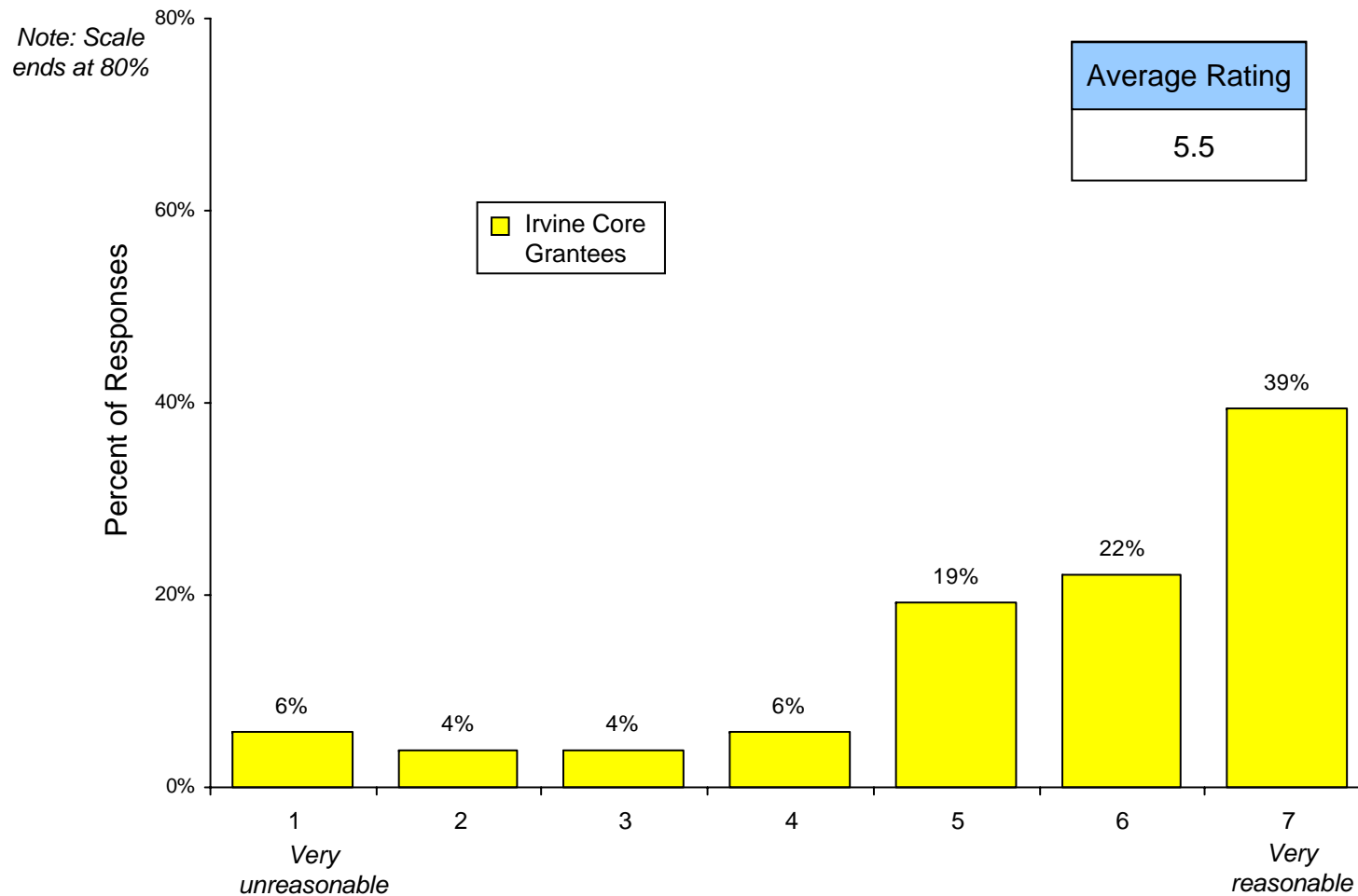
Selected Grantee Comments

- ♦ *“The Foundation continues to be distinguished by its accessibility to potential and current grant recipients. In a competitive grant process, it is incredibly positive to receive assistance and advice from Program Grant Managers who genuinely want to help worthy organizations succeed in their pursuit of grant funding. They are honest without being discouraging and helpful without being patronizing.”*
- ♦ *“The Foundation’s guidelines were clear and easy to follow; the online submission process works very well; Foundation staff are responsive and very helpful.”*
- ♦ *“Printed/online materials are very well aligned with information coming from staff. The process of proposal review was explained clearly. The Foundation was open to allowing a relatively minor change in our request after the proposal was submitted. In all, staff members were very forthcoming in giving us a clear understanding of the foundation’s goals and how we could help forward them. My only criticism would be that the window between approval of the LOI and the due date for the full proposal was very narrow (about 2 weeks).”*

Time and Effort Required of Grantees Relative to Dollar Award

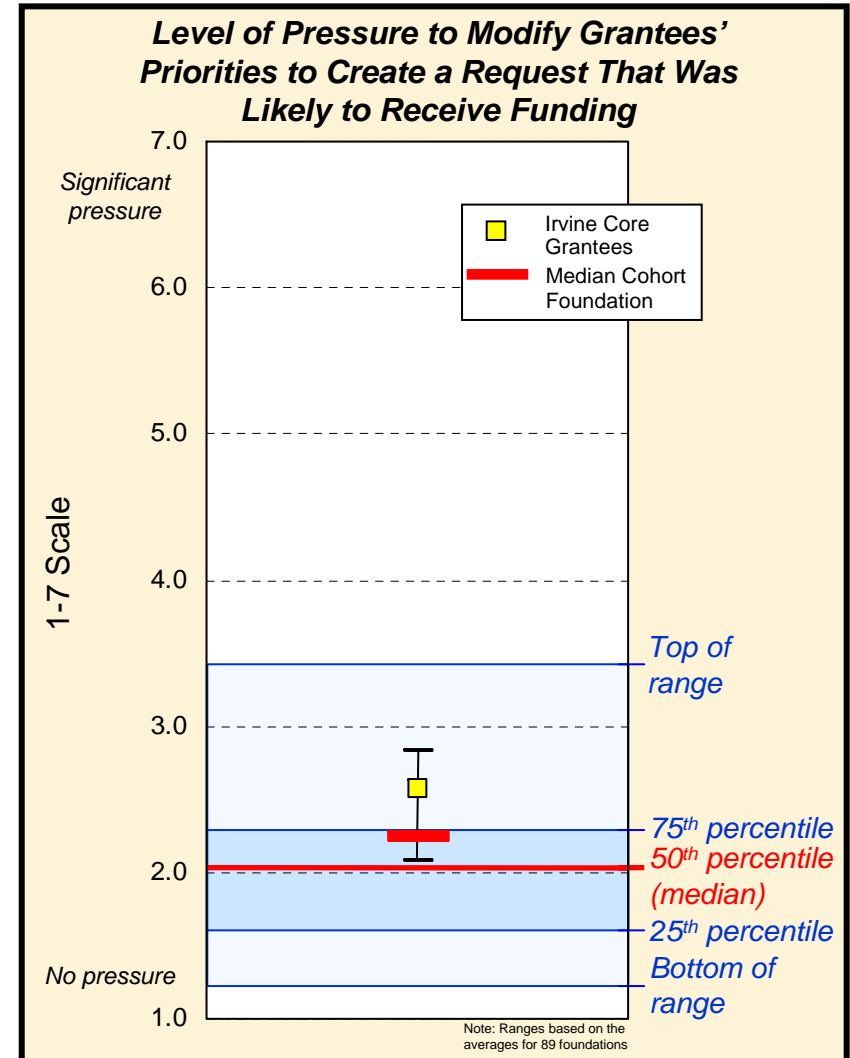
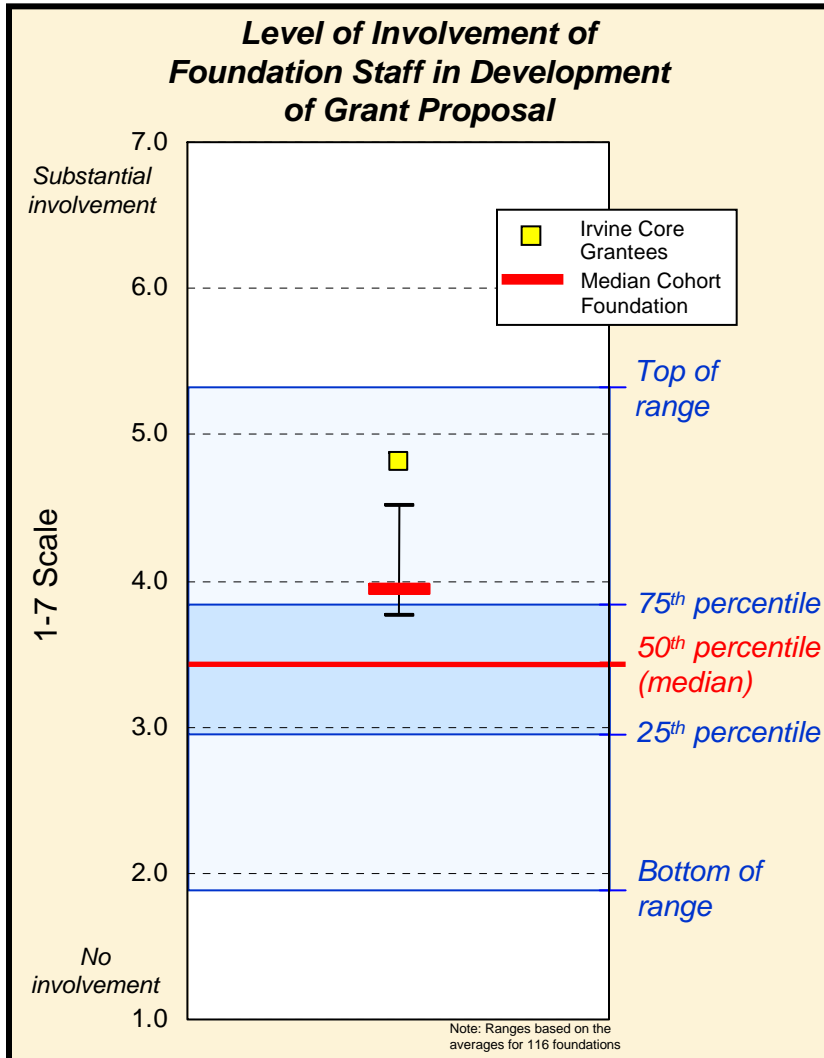
Irvine grantees were asked about the time and effort required during the proposal and selection process relative to the dollar award received. On average, Core grantees rate the Foundation a 5.5 on a scale from 1 to 7 scale, where 1 = “Very unreasonable,” and 7 = “Very reasonable.”

“How reasonable do you find the time and effort required to complete the Foundation’s proposal and selection process to be, relative to the dollar award you received?”



Foundation Involvement and Pressure in Selection Process

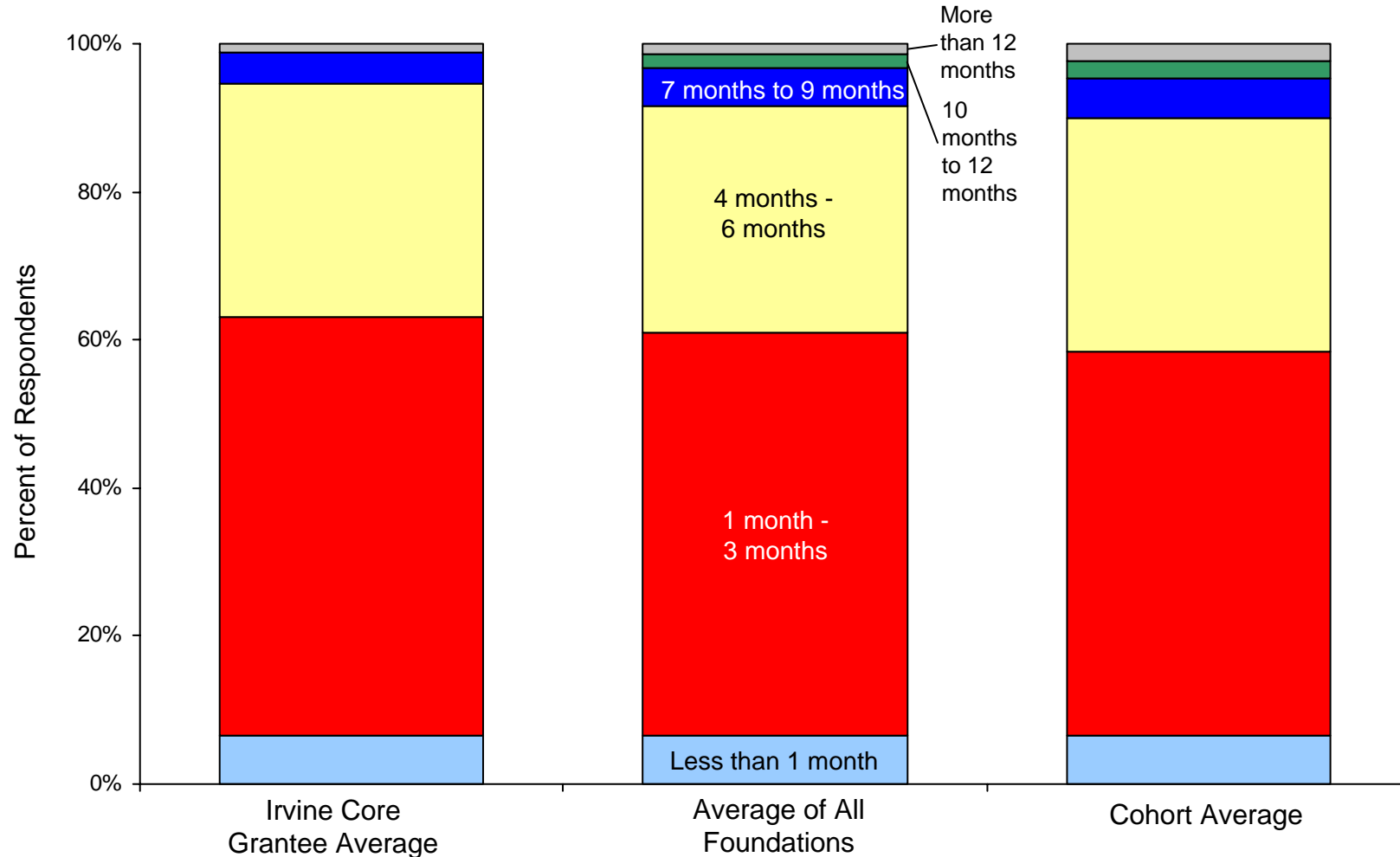
Irvine staff are more involved in proposal development with Core grantees than staff of the median foundation and the median cohort foundation. Irvine Core grantees' ratings of the level of pressure they perceived to modify their priorities in order to receive funding are above the ratings of the median foundation and median cohort foundation.



Time Between Submission and Clear Commitment

Fifty-seven percent of Core grantees report one to three months elapsing between proposal submission and a clear commitment from the Foundation, a typical proportion.

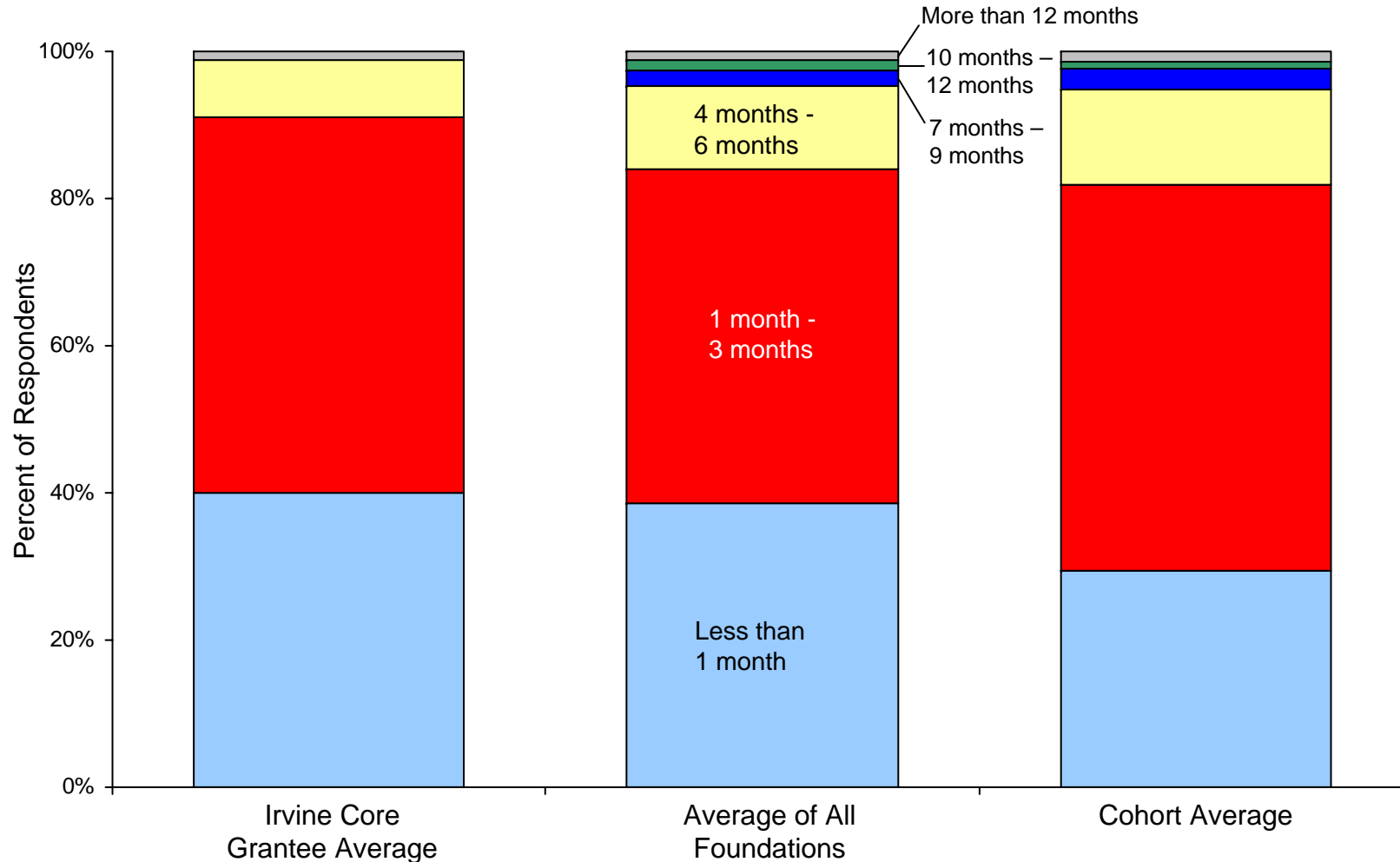
Time Elapsed Between Proposal Submission and Clear Commitment



Time Between Clear Commitment and Receipt of Funds

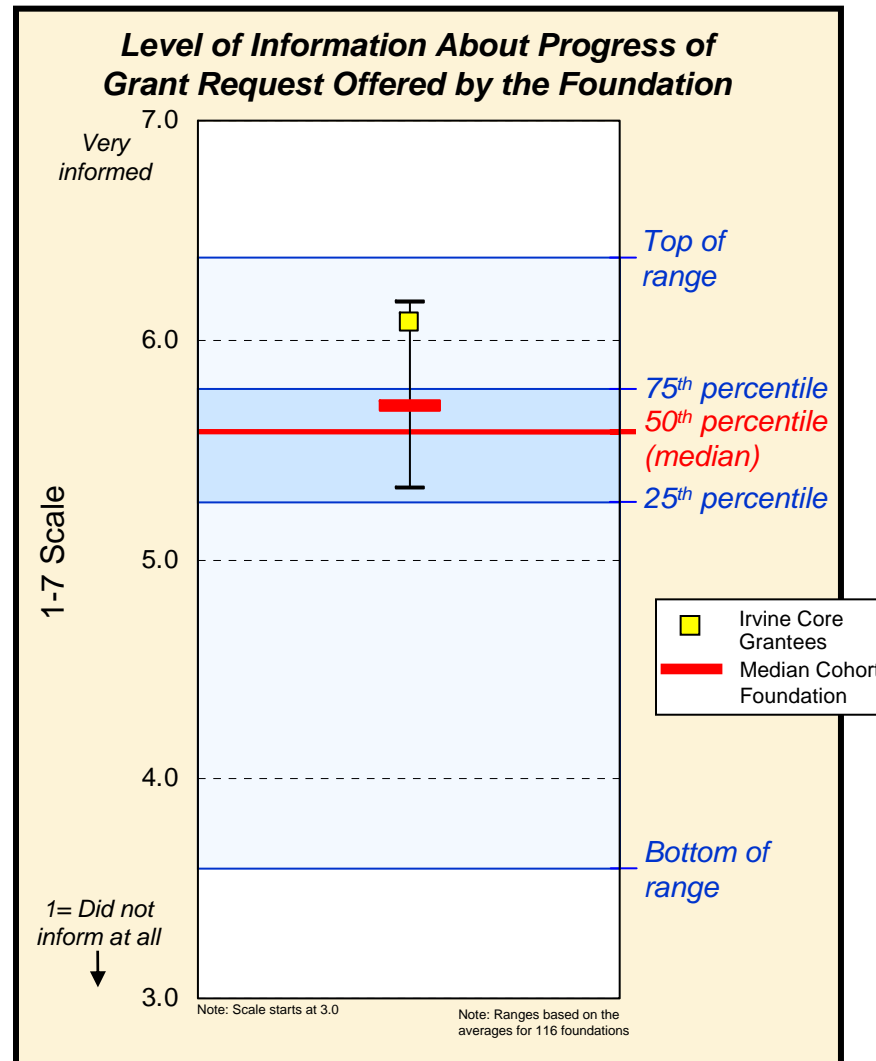
Ninety-five percent of Core grantees report six months or less elapsing between clear commitment of funding and receipt of funds from the Foundation – a typical proportion.

Time Elapsed Between Clear Commitment and Receipt of Funds



Communication During Selection Process

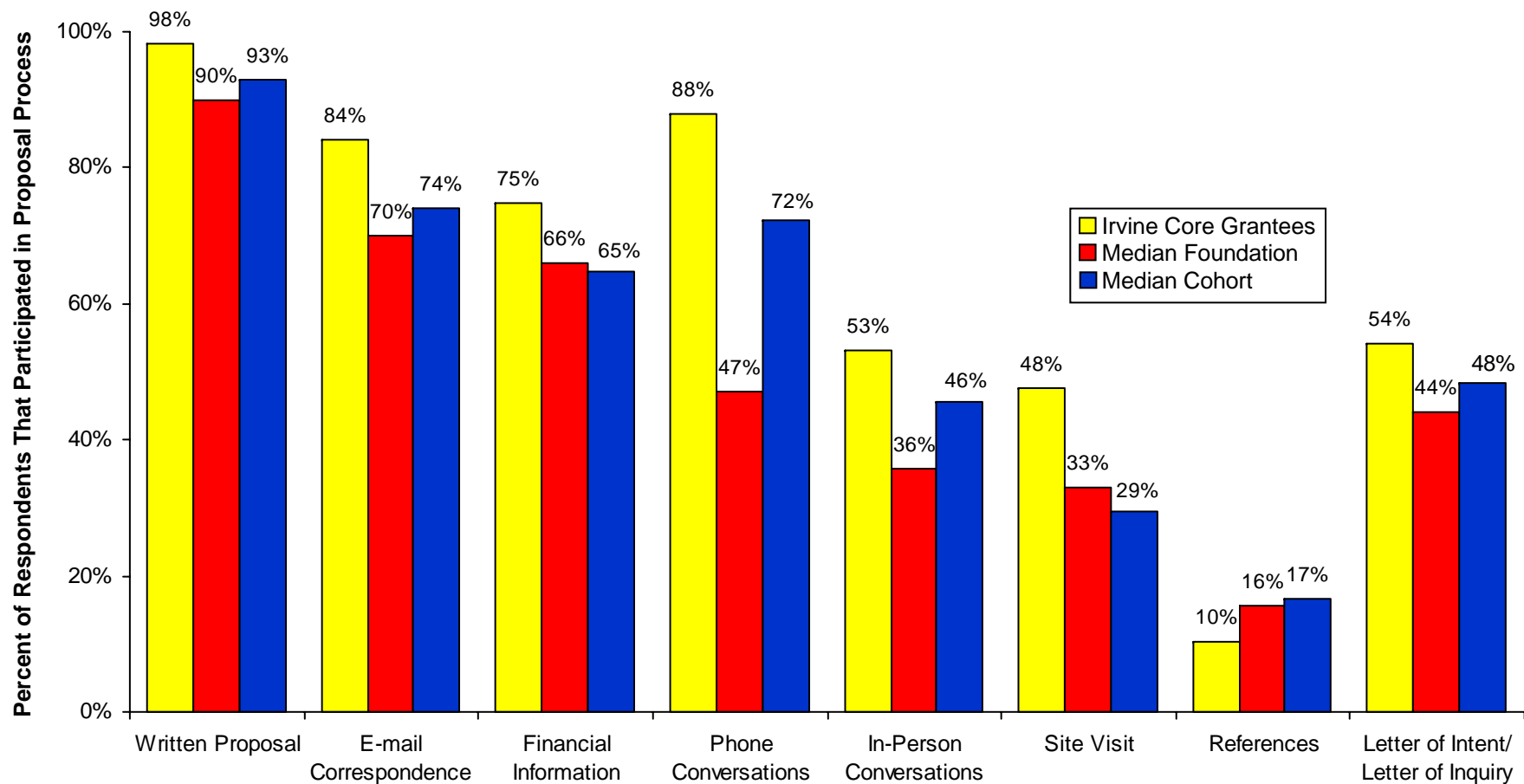
Irvine Core grantees are more informed about the progress of their grant requests during the selection process than are grantees at the median foundation and the median cohort foundation.



Data Requested During Selection Process

In general, a larger than typical proportion of Irvine Core grantees report requests for these types of data during the selection process compared to the median foundation and median cohort foundation.

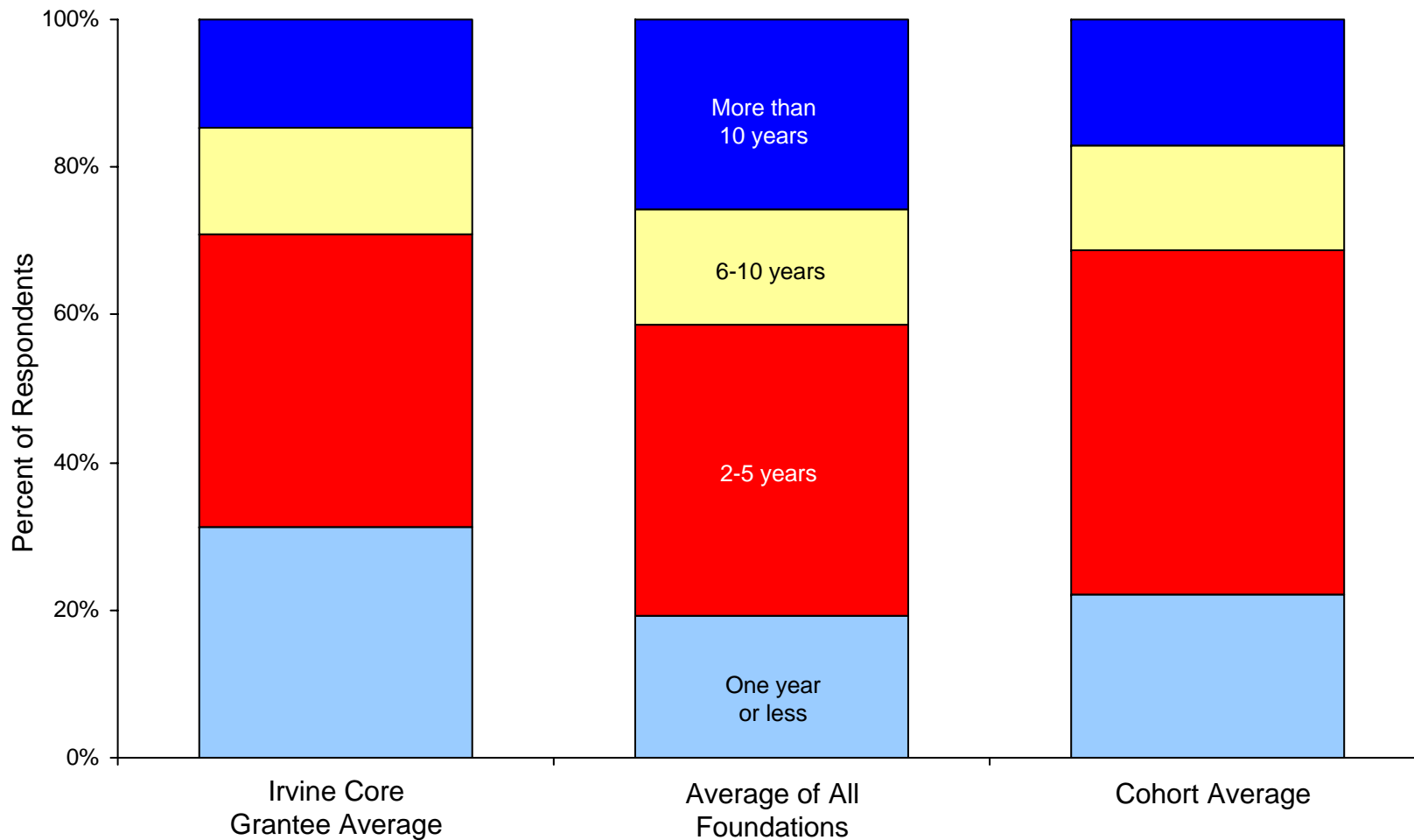
Data Requested by the Foundation During the Selection Process



History of Grantee Programs (1)

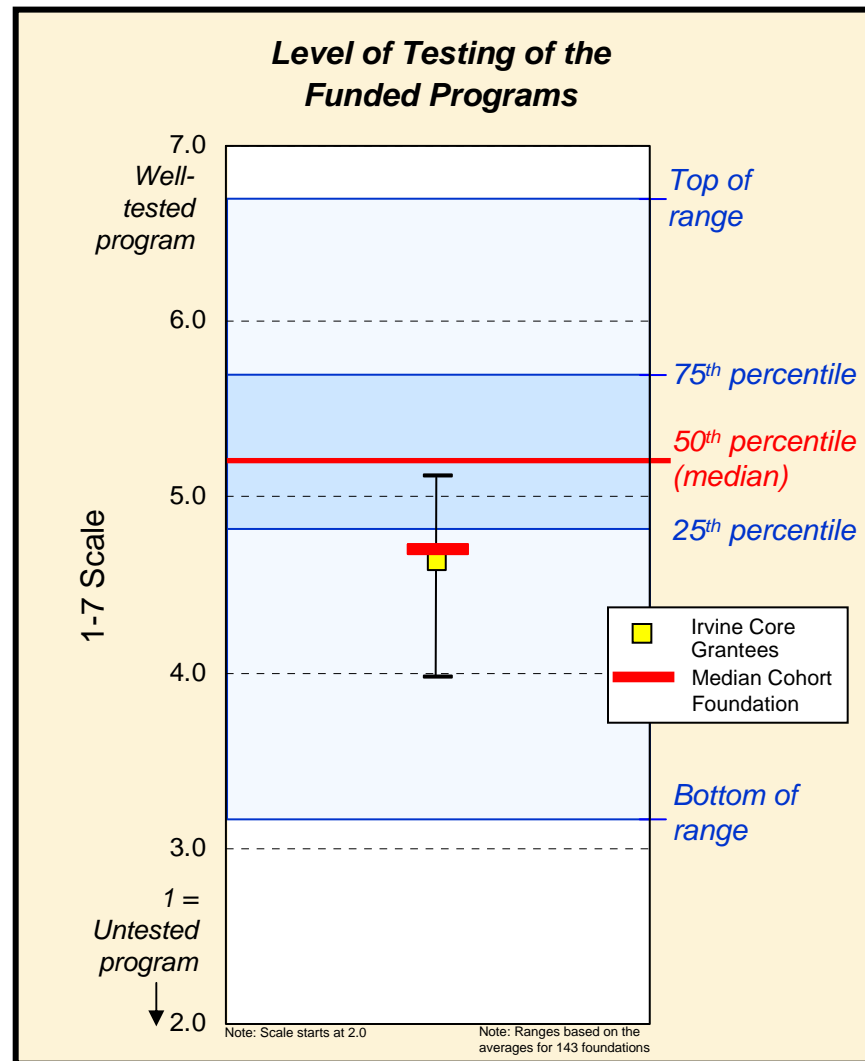
Core grantees have a shorter than typical history of implementation compared to grantees of all foundations and a similar history of implementation compared to the comparative cohort.

Length of Time Which Grantees Have Regularly Conducted the Funded Programs



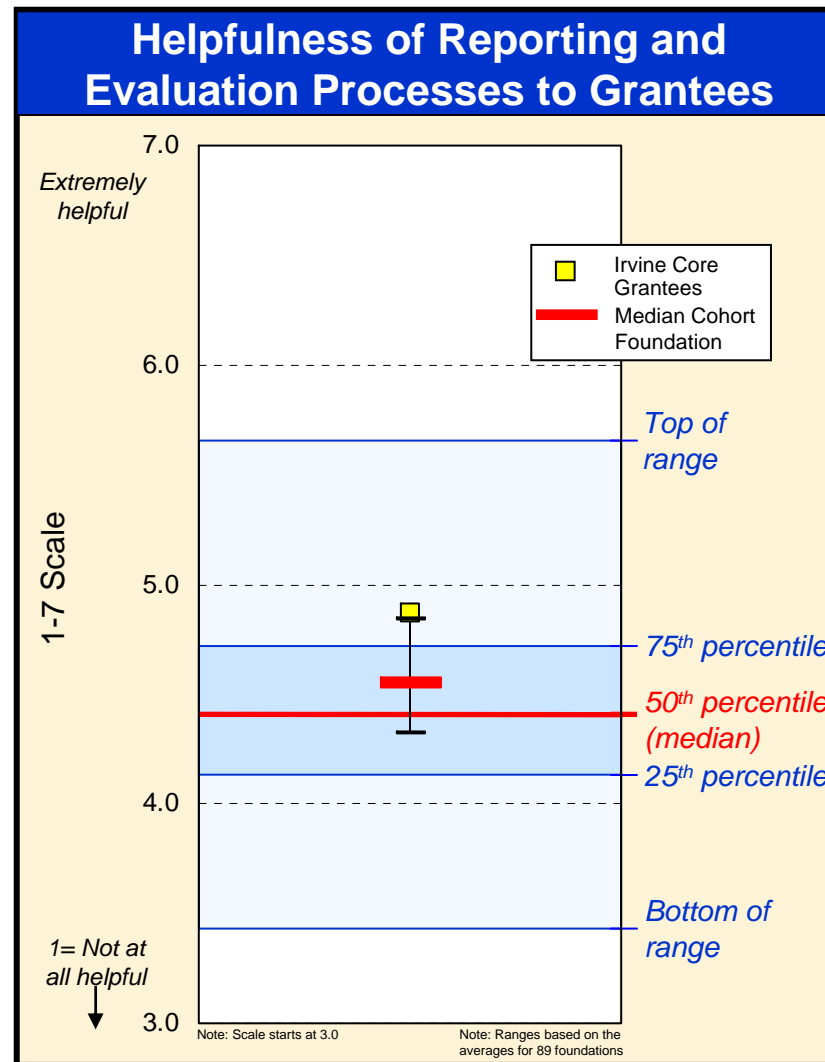
History of Grantee Programs (2)

Programs are described by Core grantees as being less tested compared to programs funded by the median foundation and similarly tested as at the median cohort foundation.



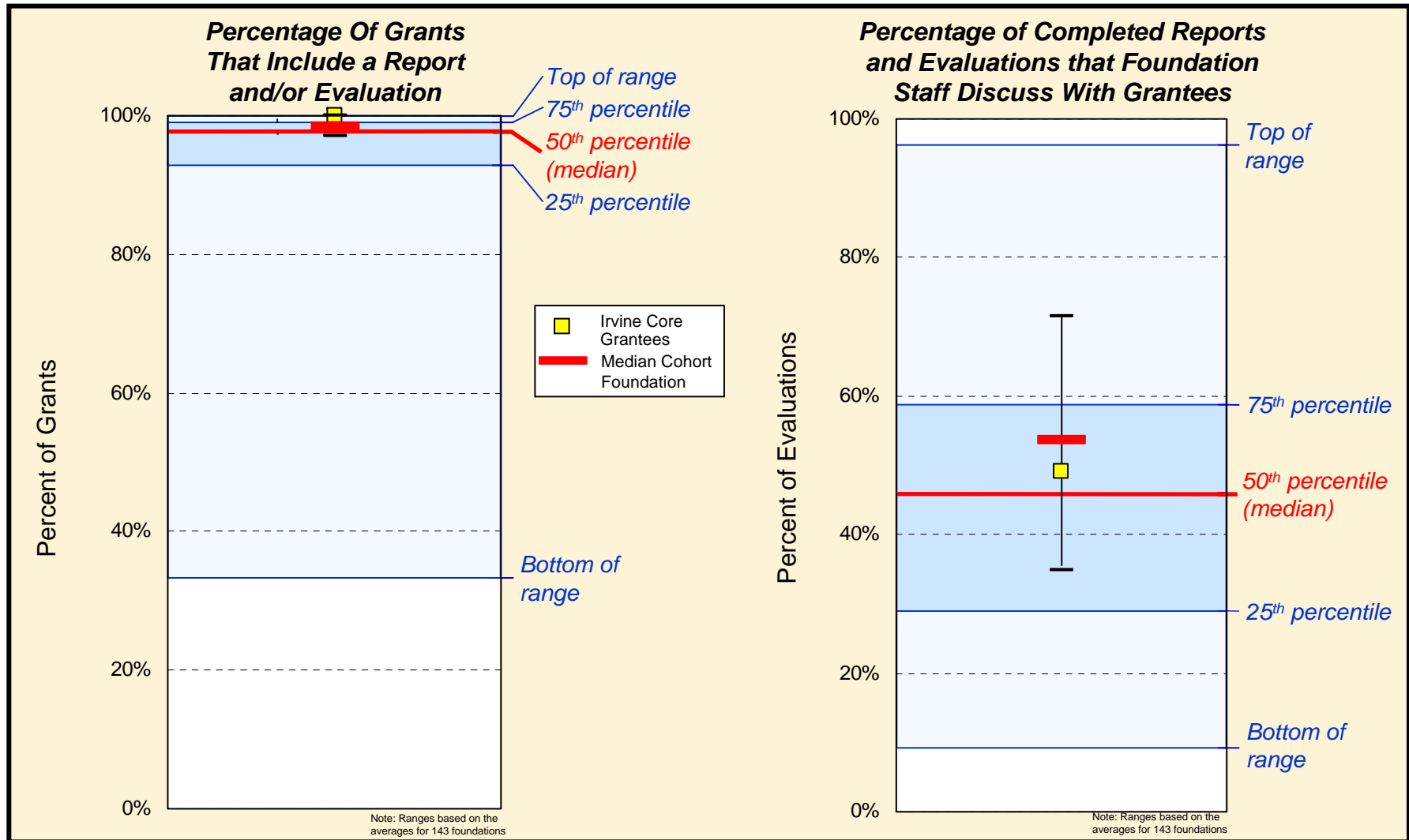
Helpfulness of Reporting and Evaluation Processes

Reporting and evaluation processes are seen to be more helpful to Core grantees in strengthening grantees than the processes of the median foundation and median cohort foundation.



Reporting and Evaluation Processes

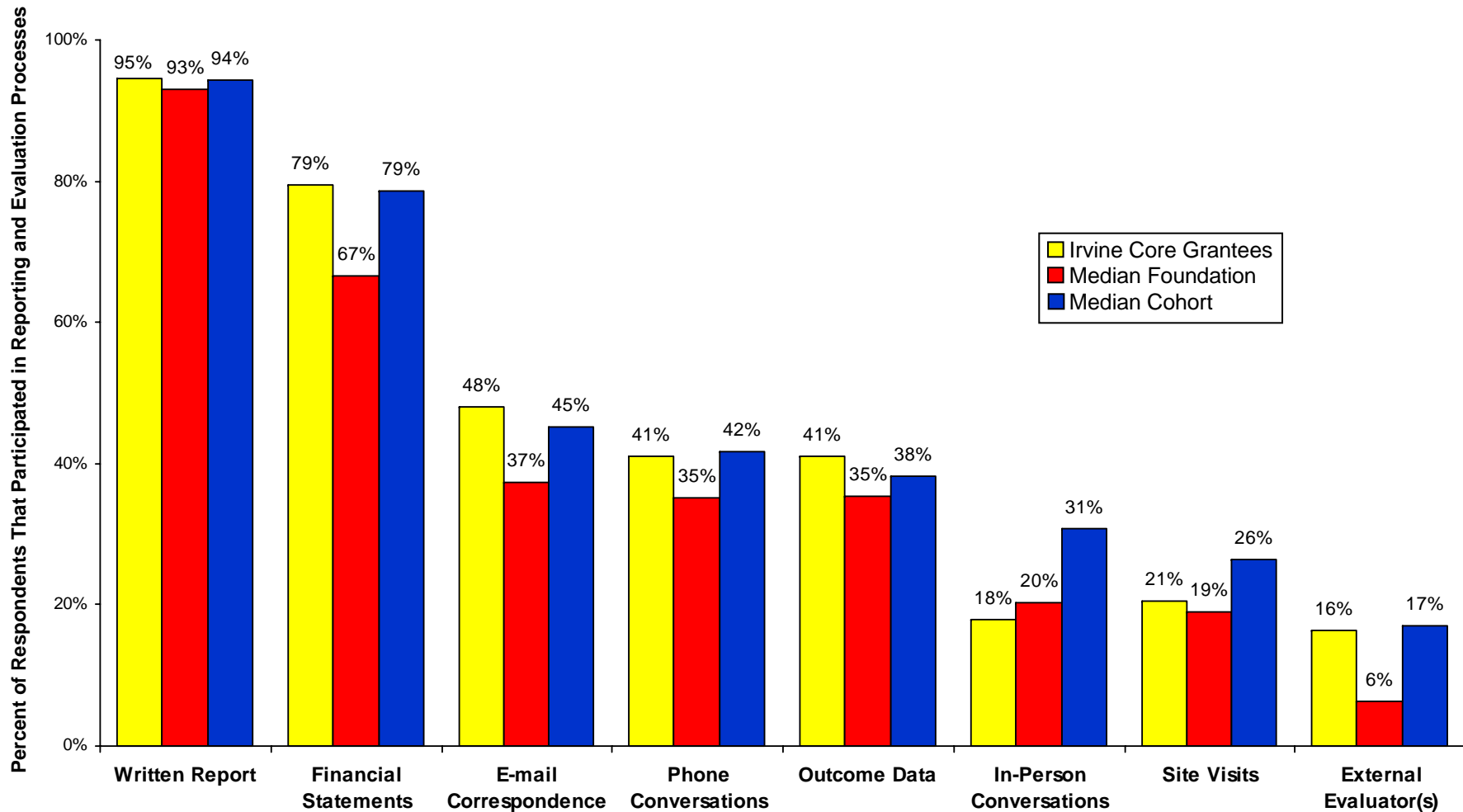
One hundred percent of Irvine Core grantees report that their grant includes a report/evaluation and 49 percent report discussing completed reports/evaluations with Foundation staff.



Data Requested During the Reporting and Evaluation Processes

Core grantees less frequently report engaging in in-person conversations and site visits compared to grantees of the median cohort foundation.

Data Requested by the Foundation During the Reporting and Evaluation Processes

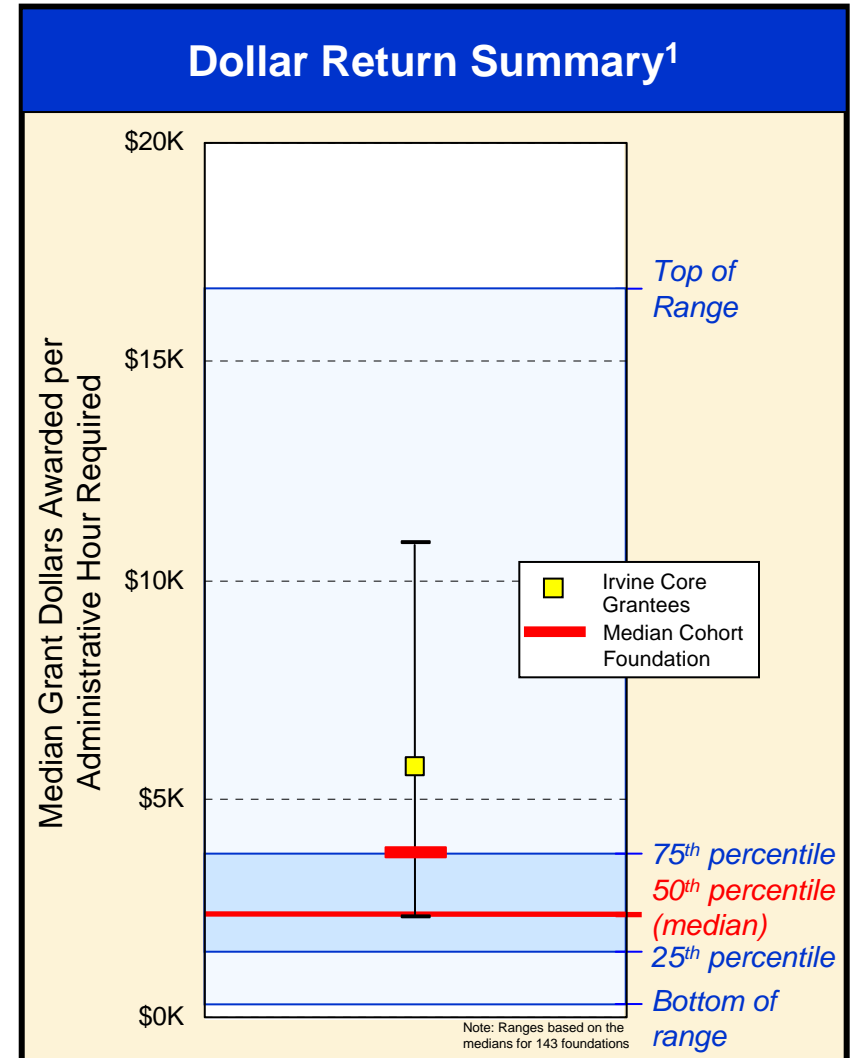


Dollar Return Summary

Irvine Core grantees receive a larger number of dollars per administrative hour required compared to grantees of the median foundation and median cohort foundation.

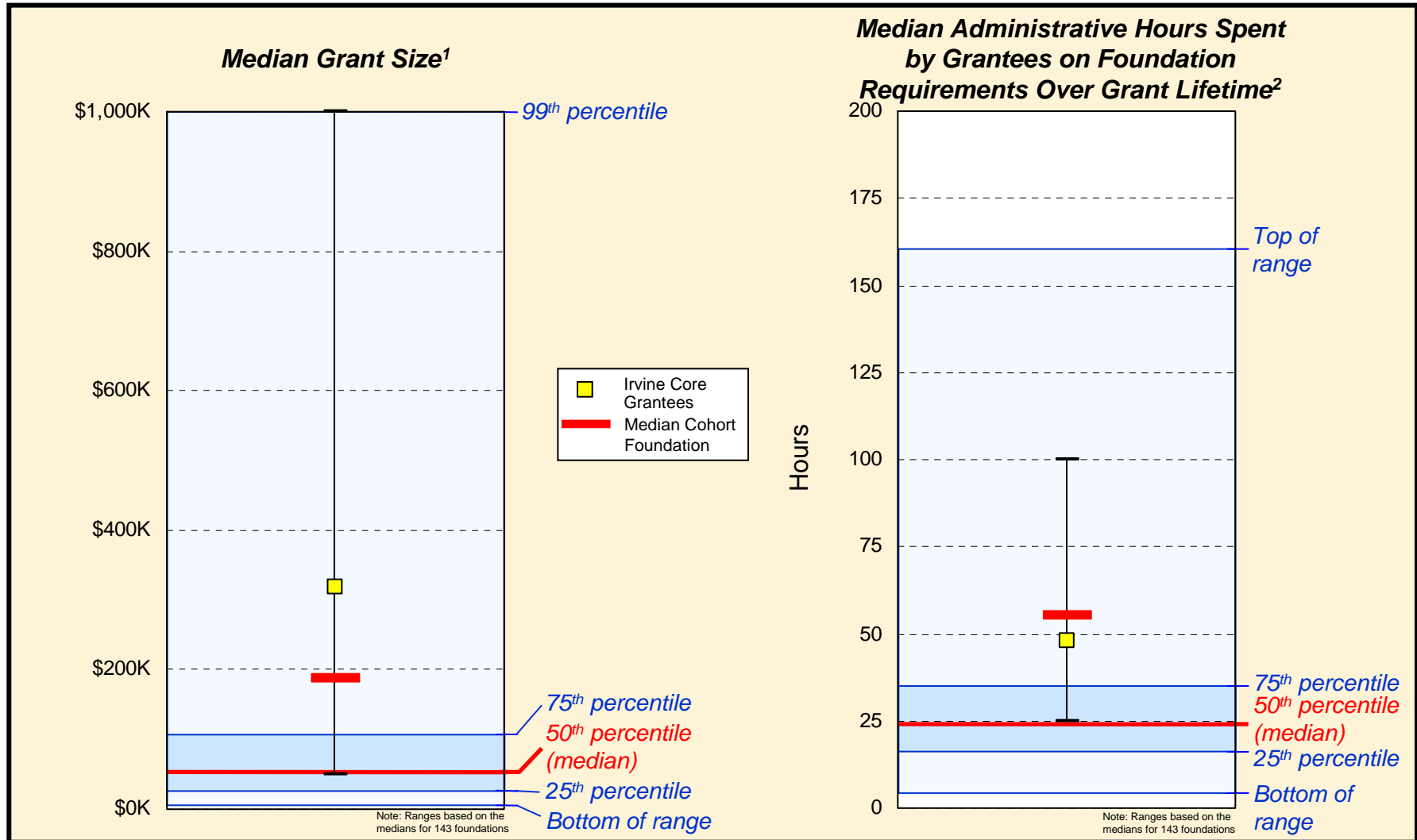
This summary includes:

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



Grant Size and Administrative Time

Irvine awards Core grantees grants that are larger in size (at the median) compared to the median foundation and median cohort foundation. Core grants require more administrative time than at the median foundation and a similar amount as at the median cohort foundation.

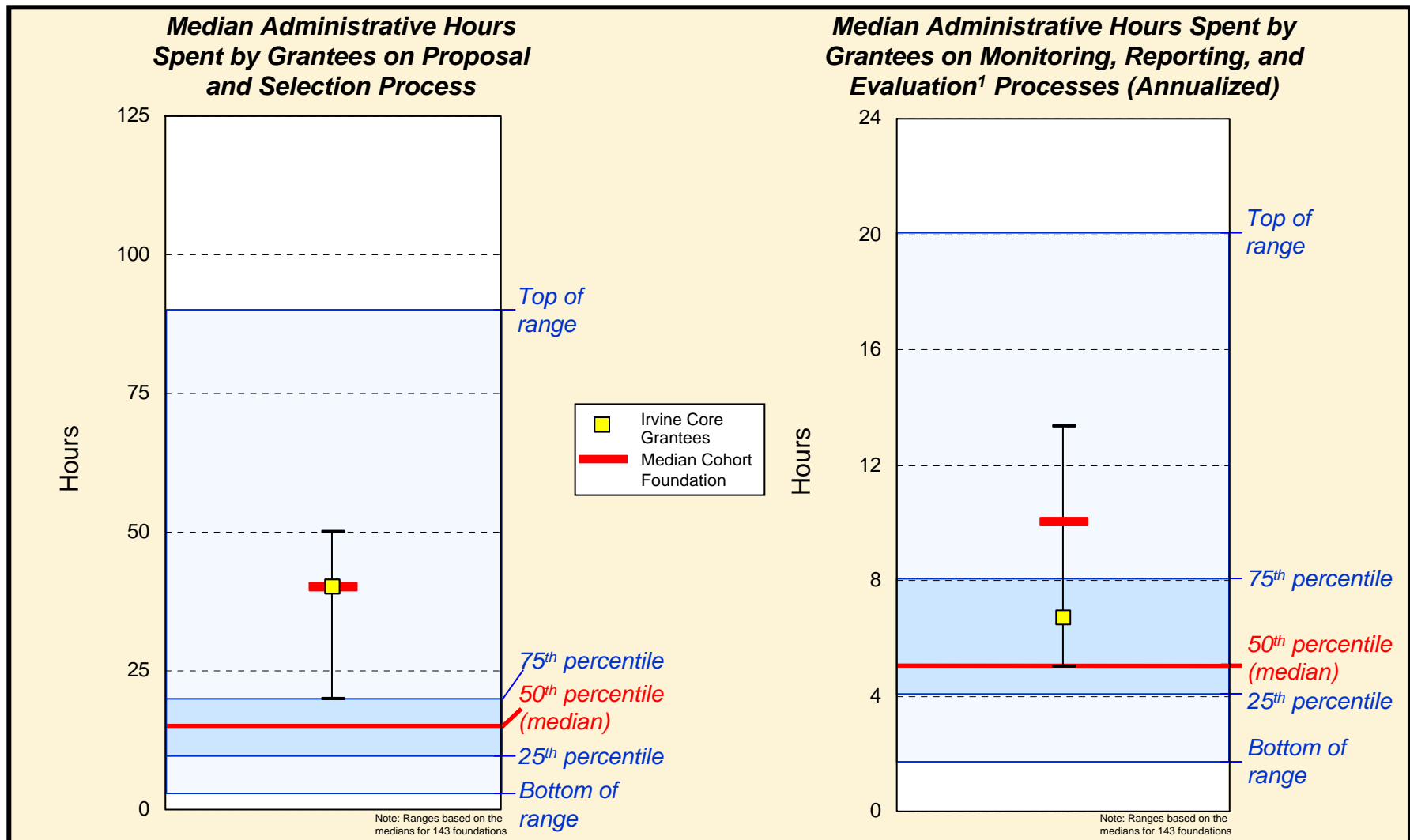


1: Chart does not include data from two foundations whose median grant size exceeds \$1,000K.

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.

Administrative Time

The application process and annual foundation-related monitoring, reporting, and evaluation of the grant require more time from Core grantees than at the median foundation. Core grantees spend less time on the evaluation process than grantees at the median cohort foundation.



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

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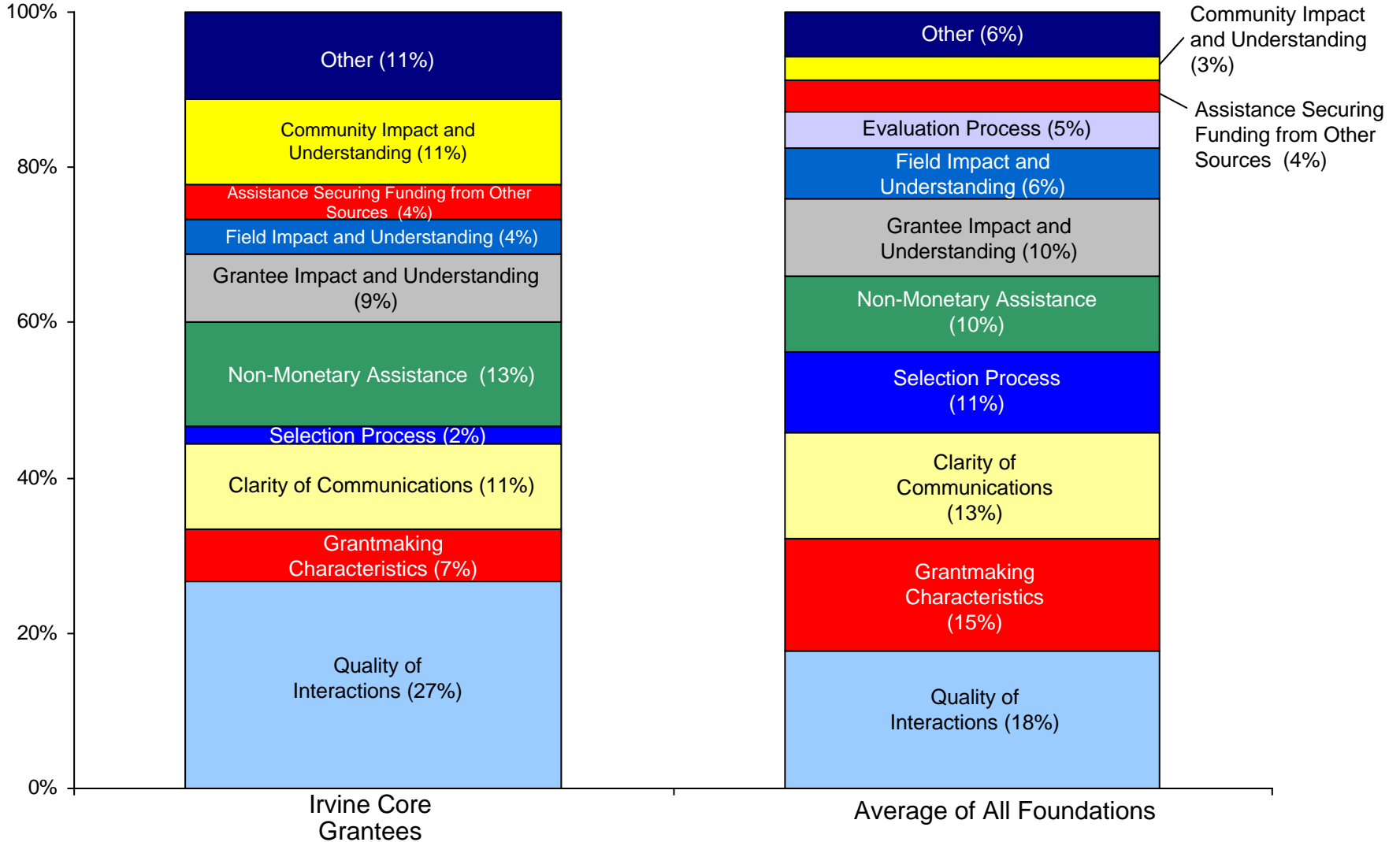
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Grantee Suggestions for the Foundation (1)

A larger than typical proportion of Core grantee suggestions concern quality of interactions and community impact and understanding.

Topics of Grantee Suggestions



Grantee Suggestions for the Foundation (2)

Topic of Grantee Suggestion	% of Irvine's Core Grantee Suggestions	% Average Foundation Suggestions	Irvine Grantee Suggestions
Quality of Interactions	27%	18%	<p>"[More] consistent staffing." "The turnover in the arts program has made it difficult to develop a real relationship and that is my reason for stating that I am less satisfied ... It's a tough situation for everyone involved." "It is not clear who should be our primary contact/point person at the Foundation. We would have more interaction if we had a clear person who we knew wanted to be hearing from us." "It would be useful to have an opportunity to meet not only with our program officer, but occasionally with the arts program director as well." "More positive face-to-face meetings of staff." "[We] would love to have a site visit by [a] current program officer." "[Have more] site visits to our site, or visits to the community to get feedback from its funded organizations and similar organizations would be very helpful." "Site visits are key – have more staff visit, if possible." "Establish positive internal culture, which will spread to external interactions." "More prompt response from staff, especially during proposal preparation periods."</p>
Non-Monetary Assistance	13%	10%	<p>"More opportunities for grantees to interact in structured, peer orientated settings." "Pair theoretical TA with more practical hands-on training." "I would like it if the Foundation introduced us to other grantees, groups working within our field of interest and community leaders." "It would be great to have a gathering of all the organizations funded by this initiative (CA Votes Initiative) and other similar grantees to be able to share successes and challenges. Also, it would be great if the Foundation could publish these as case studies or findings to share in the community."</p>

Grantee Suggestions for the Foundation (3)

Topic of Grantee Suggestion	% of Irvine's Core Grantee Suggestions	% Average Foundation Suggestions	Irvine Grantee Suggestions
Clarity of Communications	11%	13%	"There is an impression in the community that the Foundation is not accessible and its processes not transparent. There has been confusion, particularly in LA, due to changes in staffing over the last several years." "Better instruction or articulation about the direction or goals of the Foundation." "Consistency between the public goals and the funding realities." "Foundation needs transparency, candor, flexibility in its grantee management." "More communication & open to community needs."
Community Impact and Understanding	11%	3%	"[Release a] publication of additional studies on critical issues facing CA and lessons learned from initiatives." "It would be wonderful if the Foundation increased its support to San Diego and the far southern area of California to warrant opening an office here, so we would have more regular contact." "Better understanding of community, field." "
Grantee Impact and Understanding	9%	10%	"Trust the grantee's priorities and judgment more." "I would have appreciated more help in lining up other foundations to support a study that ... would have a much greater impact on policy and practice in the field." "More feedback on what's working best in our Program."

Grantee Suggestions for the Foundation (4)

Topic of Grantee Suggestion	% of Irvine's Core Grantee Suggestions	% Average Foundation Suggestions	Irvine Grantee Suggestions
Grantmaking Characteristics	7%	15%	"It would be nice if they always added 10-20% to your budget for evaluation so we could afford to do more thorough evaluations." "I would love Irvine to take a leadership position in providing operating support and leading organizations. I'd love to see more capital support." "We need funding for data entry only -- this is a special skill that is overlooked because it fits into core operating."
Field Impact and Understanding	4%	6%	"I would request that the voter development funds be available statewide." "Attention to the pipeline: University institutes or programs serving first generation, low income middle school-through-high school students – we have received substantial federal funds but very much need counsel and funds to reach our access goals."
Assistance Securing Funding from Other Sources	4%	4%	"[Offer] more support for additional funding with other funders." "Offer to introduce groups to other donors."
Selection	2%	11%	"More sensitivity to sending mixed messages on the amount of funds available for grants."

Grantee Suggestions for the Foundation (5)

Topic of Grantee Suggestion	% of Irvine's Core Grantee Suggestions	% Average Foundation Suggestions	Irvine Grantee Suggestions
Other	11%	6%	<p>"The James Irvine Foundation is among the most accessible foundations we have worked with, demonstrating a real understanding of partnership with grantees and leadership. If it could persuade other foundations to adopt its best practices the field of philanthropy would be greatly improved." "The need in most areas is capacity building, but a program focus doesn't really build capacity for sustainability." "Compatibility of technology ... some files sent to us are not readable." "I would hope for some stabilization in the staffing of the Arts program area." "It will help when their staffing is more stable and relationships can develop." "More empowerment of the program officers." "You could teach the other foundations!"</p>

Total number of Irvine Grantee Suggestions

45

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Review of Findings

Chart shows Irvine Core grantees' (◆) percentile rank among all foundations in comparative set and among a cohort of similar foundations (◆).



Indicator	Percentile					Description
	0th	25th	50th	75th	100th	
Impact on the Field						Grantees were asked to rate the foundation's impact on their fields.
Impact on the Community						Grantees were asked to rate the foundation's impact on their local communities.
Impact on the Grantee Organization						Grantees were asked to rate the foundation's impact on their organizations.
Satisfaction						Grantees were asked to rate their satisfaction with their funder.
Interactions						This summary includes grantee ratings of foundation fairness, responsiveness, and grantee comfort approaching the foundation if a problem arises.
Clarity of Communication of Goals and Strategy						Grantees were asked to rate the clarity of the foundation's communication of its goals and strategy.
Non-Monetary Assistance						This summary includes the frequency of provision and ratings of helpfulness of 14 individual activities, including management and field-related assistance.
Assistance Securing Funding from Other Sources						This summary includes the frequency of provision of foundation assistance in obtaining funding from other sources, and ratings of the impact of those efforts.
Selection Process						Grantees were asked to rate the helpfulness of the foundation's selection process for their organizations.
Reporting and Evaluation Processes						Grantees were asked to rate the helpfulness of the foundation's reporting and evaluation processes for their organizations.
Dollar Return on Grantee Administrative Hours						This summary is calculated by dividing the dollar value of individual grants by the time required of grantees to fulfill the foundation's administrative requirements.

Areas for Discussion (1)

- ♦ **High Marks on Impact on Fields and Grantee Organizations**
 - Irvine Core grantees rate the Foundation positively – close to or above the 75th percentile – for its impact on the field and impact on grantee organizations, provision and helpfulness of non-monetary assistance, helpfulness of the selection process, helpfulness the reporting and evaluation process, and dollar return on grantee administrative dollars.

- ♦ **Core Grantees Rate the Foundation’s Interactions below the Median, and Frequently Make Suggestions for Improvement**
 - Core grantees rate the interactions of Foundation staff – including comfort in approaching the Foundation if a problem arises, responsiveness of Foundation staff and fairness of Foundation treatment of grantees – below the ratings received by the median foundation and the median cohort foundation.
 - Core grantees who interact with Irvine staff monthly or more often rate the Foundation significantly¹ higher on a number of measures, including satisfaction, comfort in approaching the Foundation if a problem arises, fairness of Foundation treatment of grantees, responsiveness of Foundation staff, and understanding of grantees goals and strategies.
 - A larger than typical proportion of grantee suggestions concern quality of staff interactions. Grantees comment that Irvine staff are “supportive,” “accessible,” and “helpful” but a number also state that they would like more frequent interactions and some comment on the challenges associated with staff turnover and consistency.

Areas for Discussion (2)

- ♦ **Low Marks on Impact and Understanding of Grantees' Communities**
 - Irvine's impact on Core grantees' local communities and understanding of these communities is rated below the median foundation.
 - A larger than typical proportion of grantee suggestions concern Irvine's impact on the community.
 - A number of grantees comment that Irvine has had a great impact on the local communities and regions in which they work – a number of grantees specifically mention the Central Valley. However, in response to open-ended questions, grantees state that they would like to see Irvine expand its influence in their community.

- ♦ **Potential Exists to Provide Core Grantees With Additional Assistance Securing Funding from Other Sources**
 - Irvine provides active funding assistance from other sources to 20 percent of its Core grantees, a similar proportion compared to median foundation and a smaller proportion compared to the median cohort foundation. The impact of this assistance in securing funding from other sources is rated similarly to the median foundation by grantees.
 - Core grantees rate the Foundation's impact on their ability to continue their work above the rating received by the median foundation.

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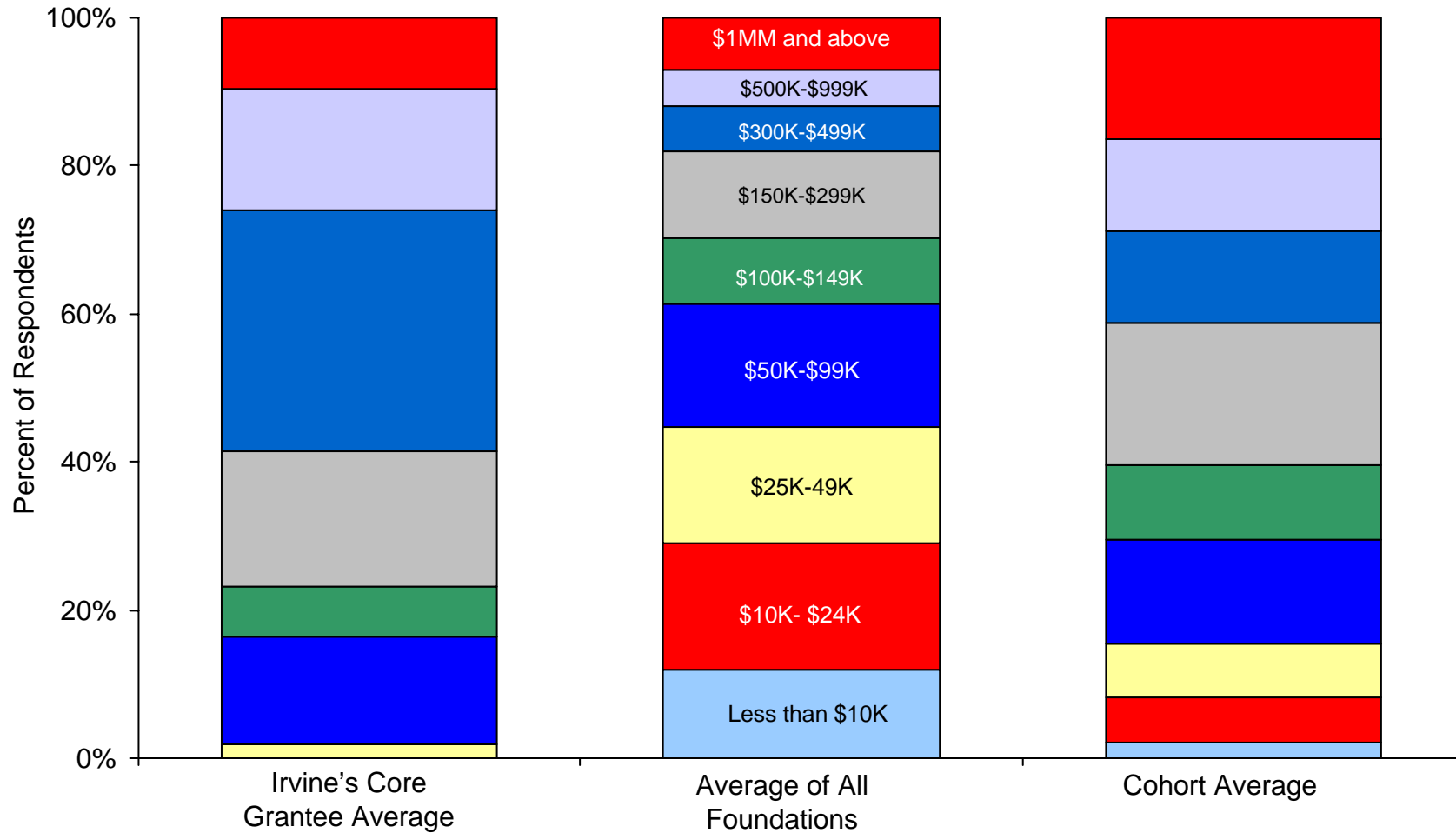
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Grant Amount

Core grantees receive grants that are larger at the median compared to other grantees in the sample.

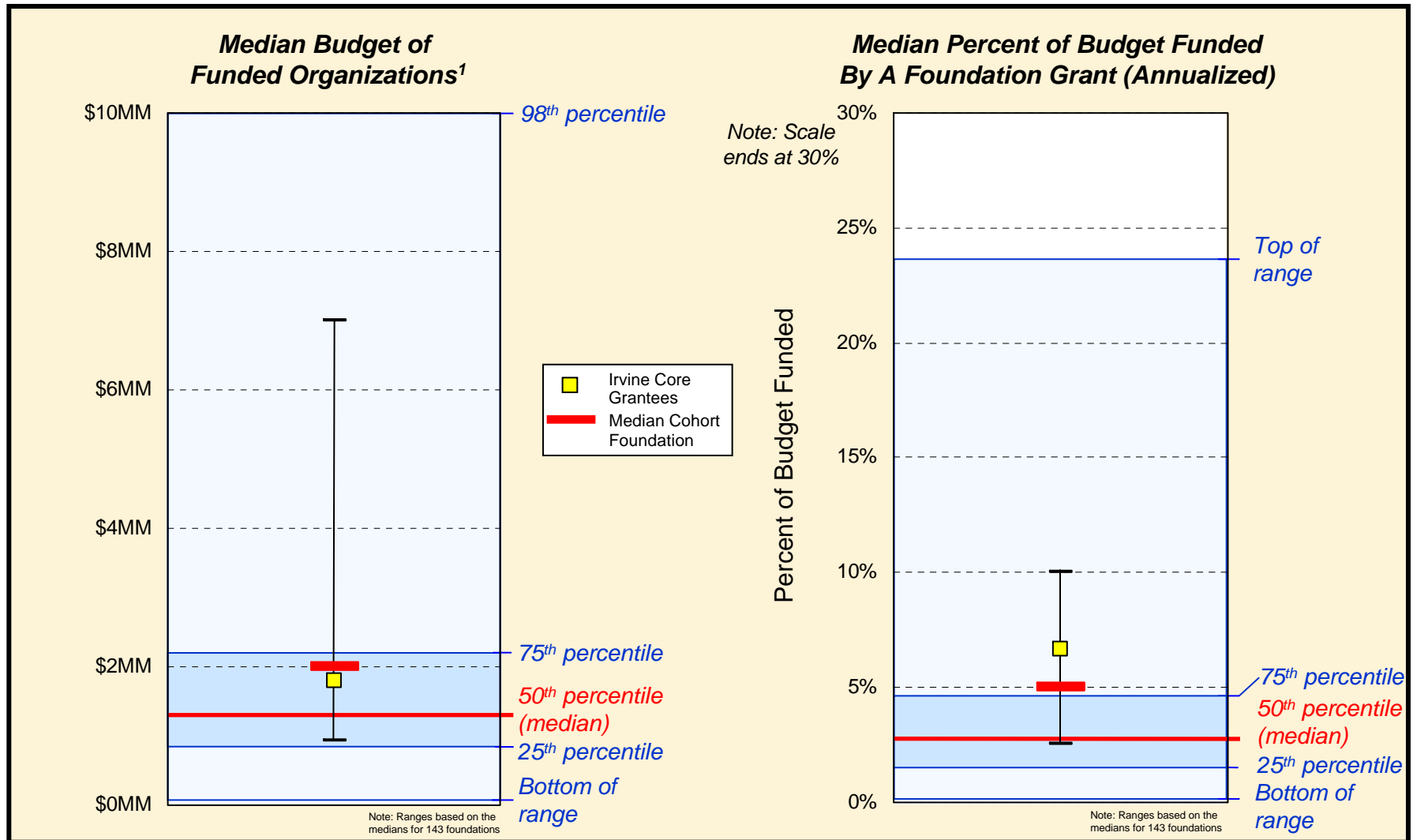
Size of Foundation Grants



Population Average	\$760K	\$715K	\$1.5MM
Population Median	\$320K	\$60K	\$200K

Size of Grantee Budget Relative to Size of Grant

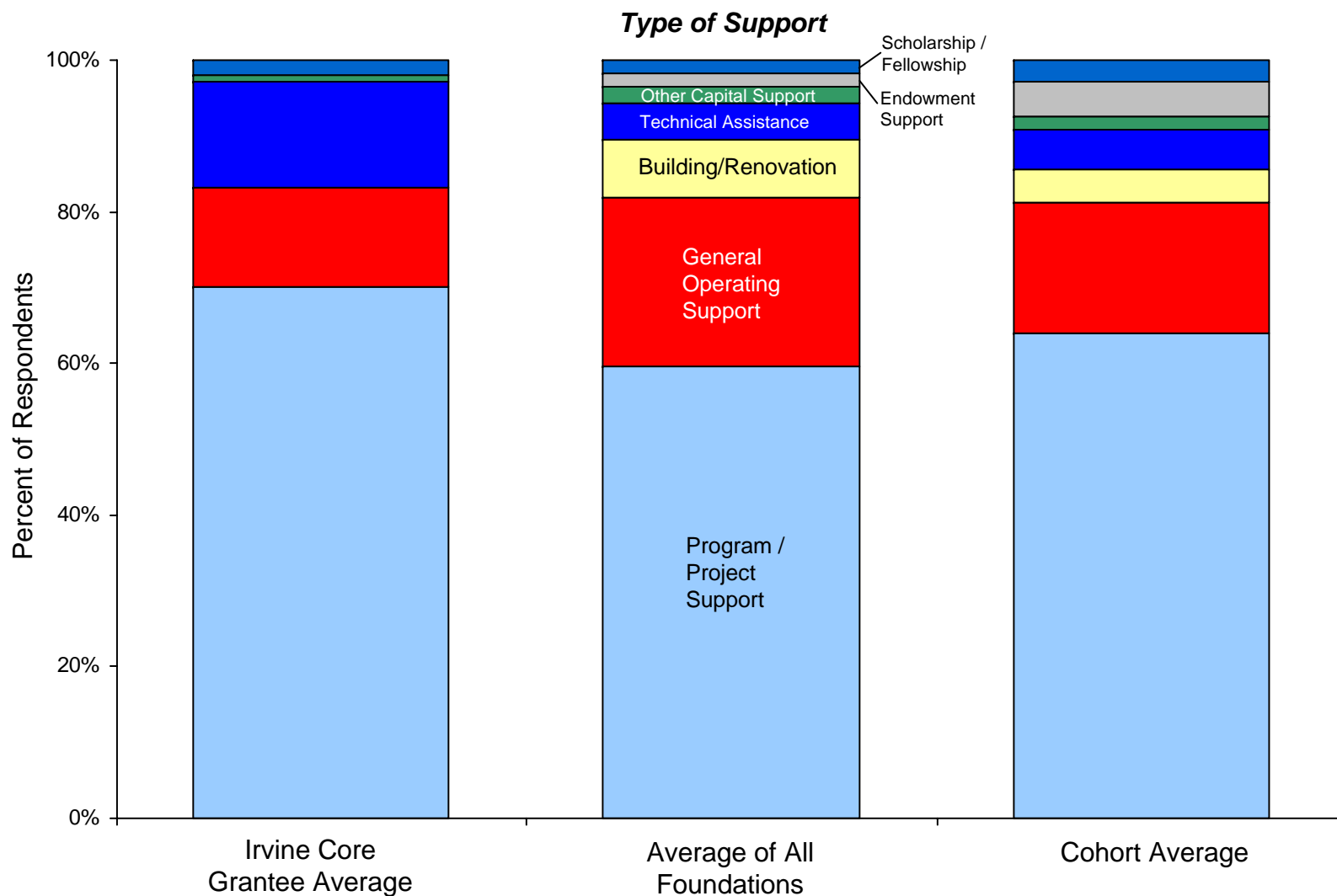
The median budget of Core grantees is larger than grantees of the median foundation and similar to grantees of the median cohort foundation. Irvine funding represents a larger percentage of these grantees' budgets compared to the median foundation and the median cohort foundation.



1: Chart range does not include four individual foundation medians of more than \$10MM.

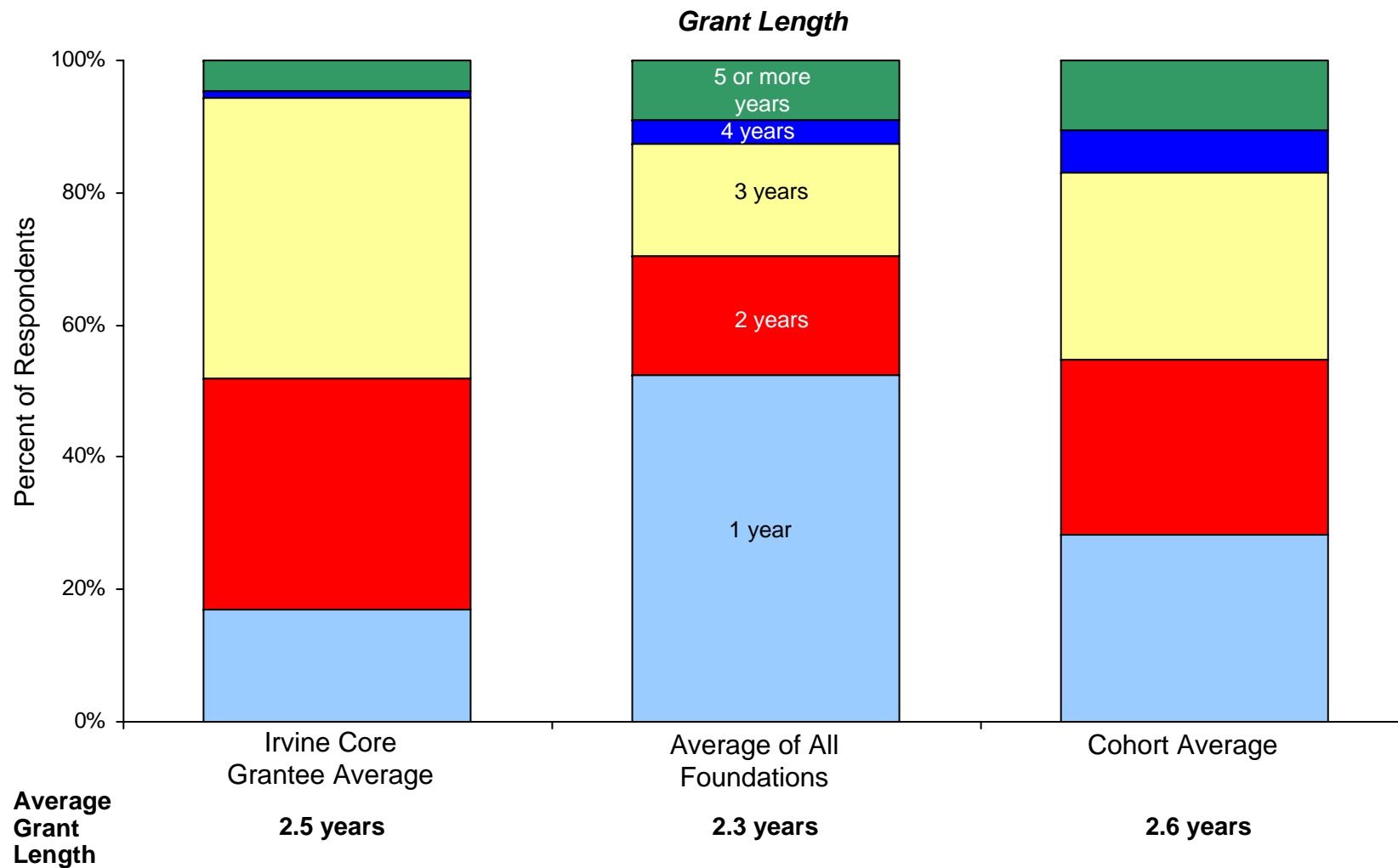
Type of Support

Irvine awards a larger proportion of program support grants than typical.



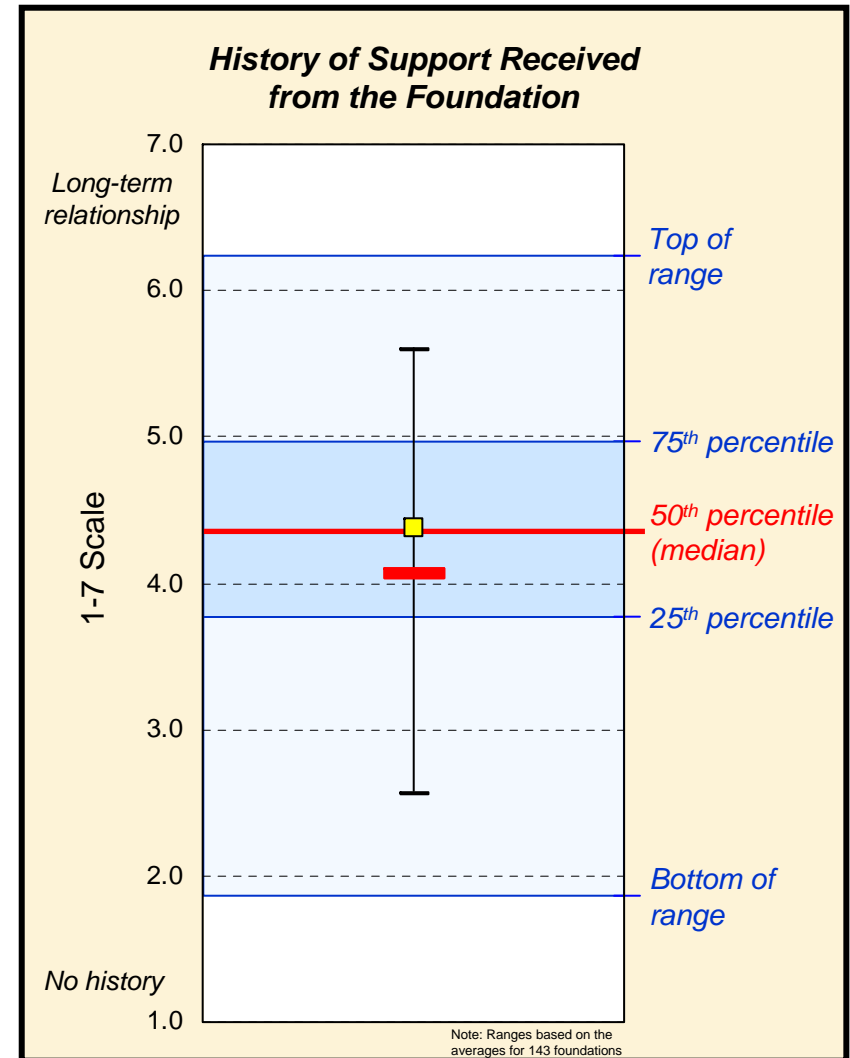
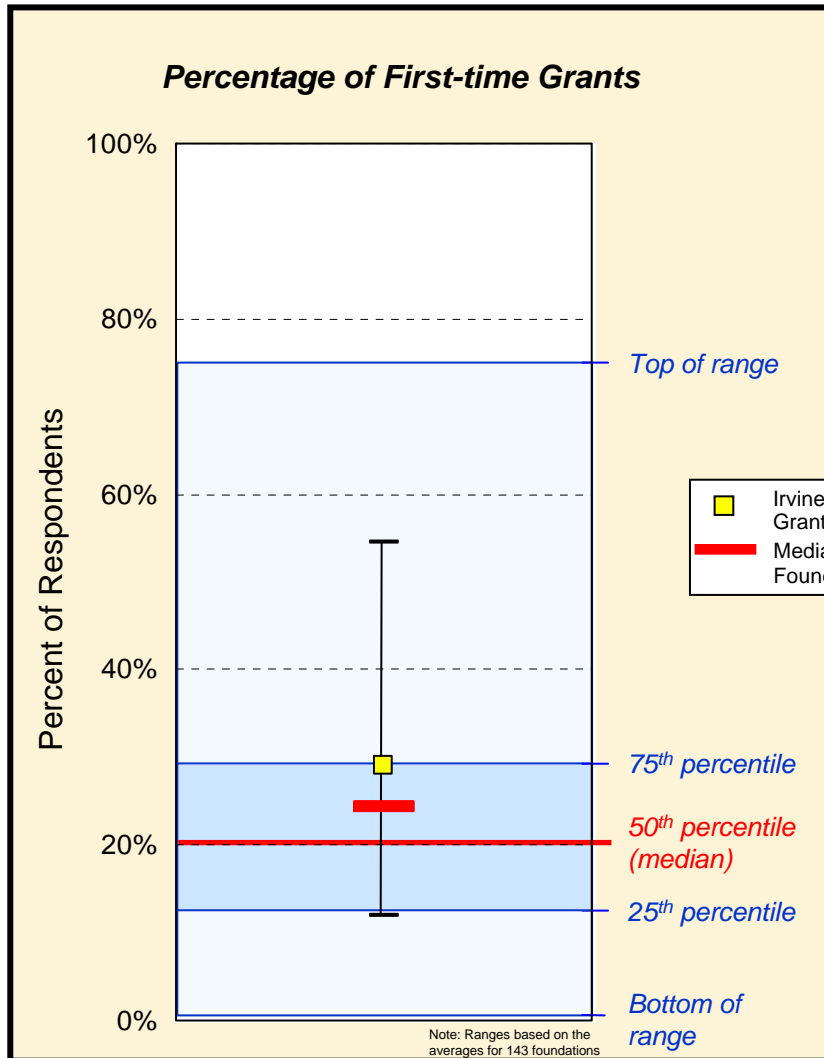
Grant Length

Irvine awards more multi-year grants to Core grantees than the typical foundation.



History of Foundation Support

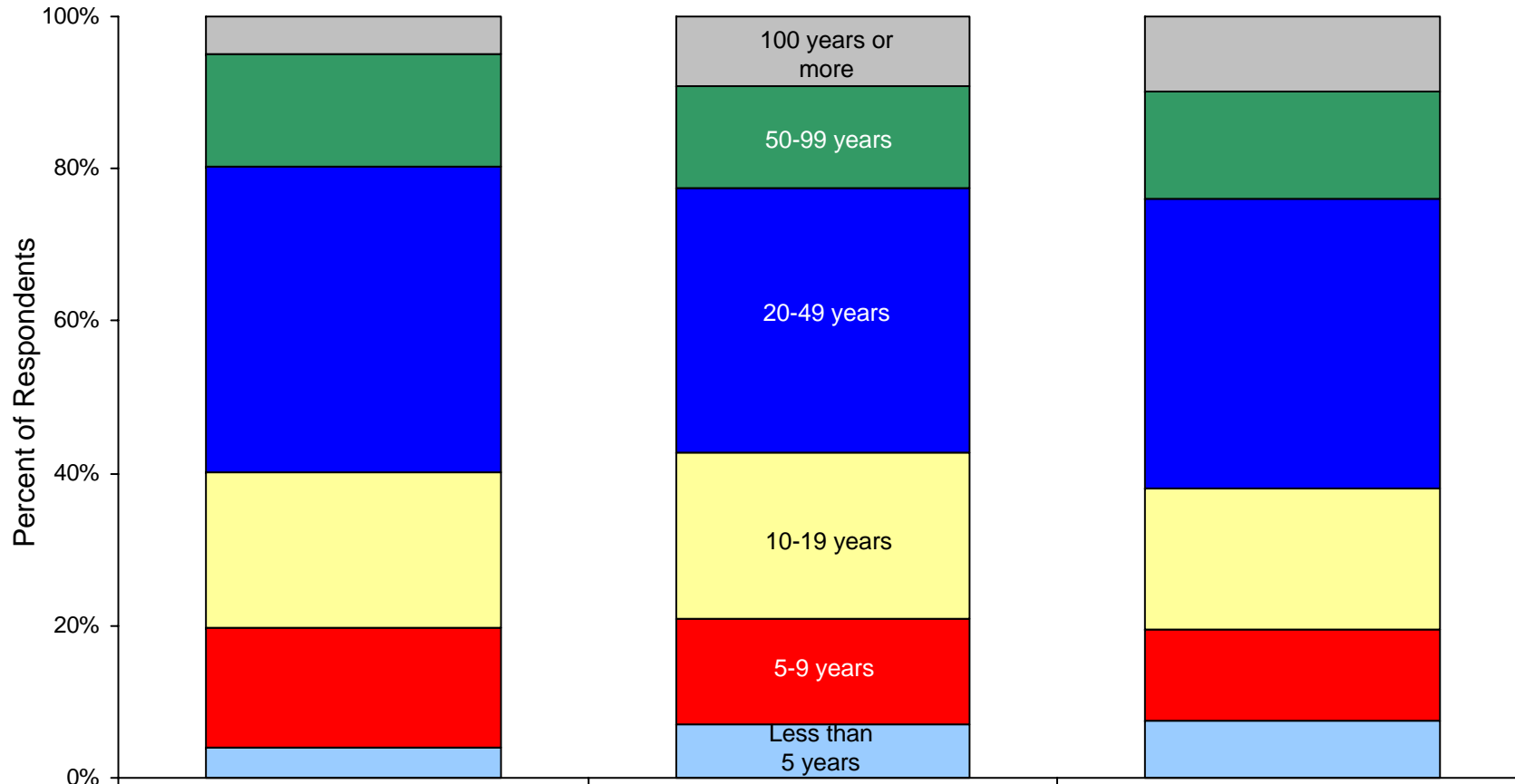
Core grantees include a larger percentage of first-time grants than the proportion of grantees at the median foundation and the median cohort foundation. Core grantees have a typical history of support compared to grantees of the median foundation and a longer history of support compared to the median cohort foundation.



Length of Establishment of Grantee Organizations

Core grantees are similar to grantees of the median foundation in their length of establishment.

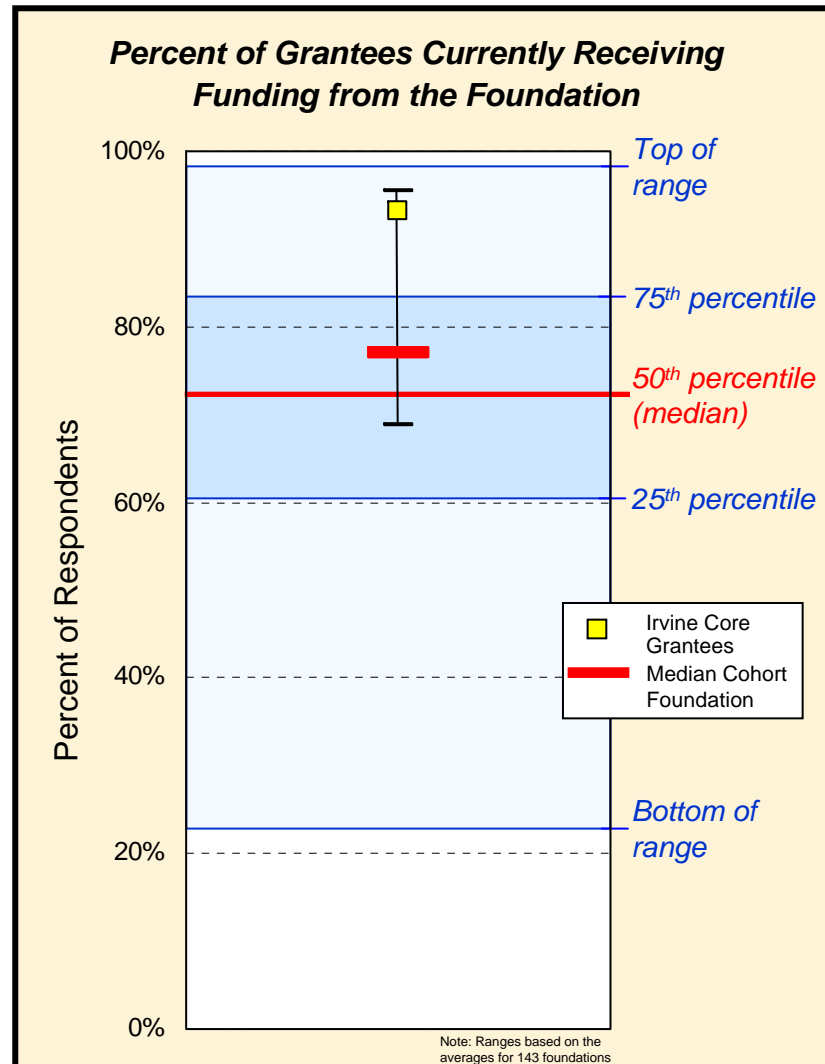
Length of Establishment of Grantee Organizations



	Irvine Core Grantee Average	Average of All Foundations	Cohort Average
Average Length of Establishment	33 years	37 years	38 years
Median Length of Establishment	24 years	23 years	25 years

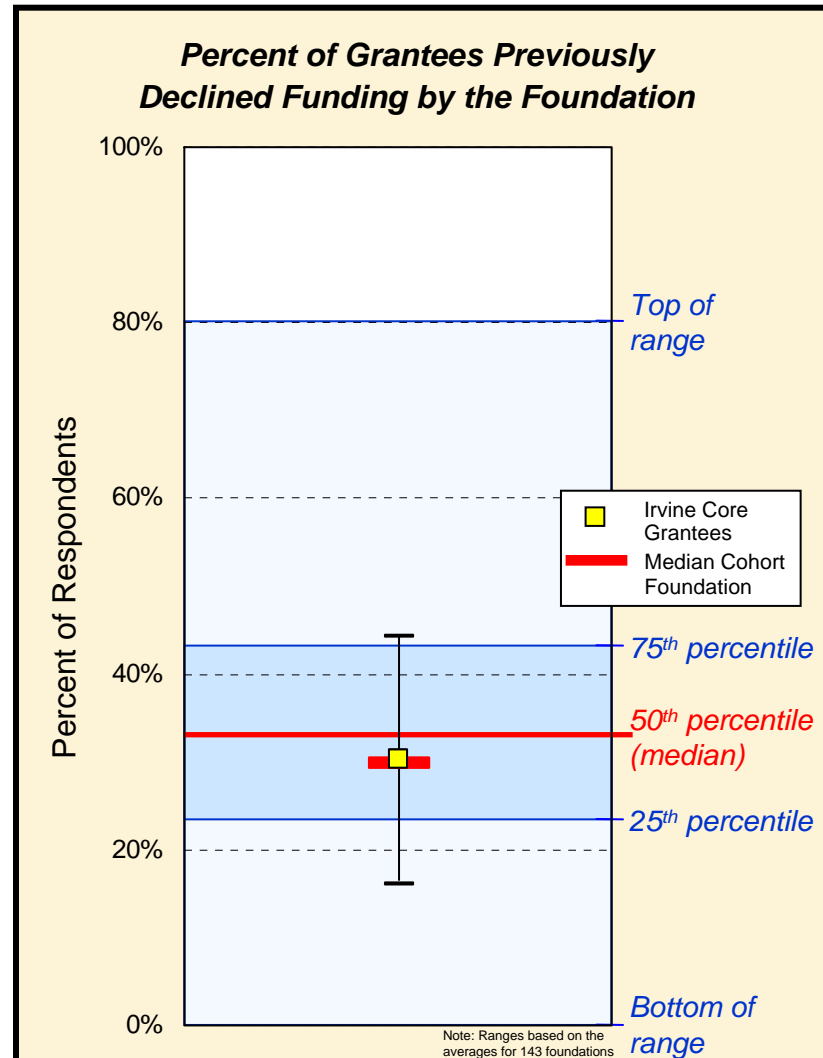
Funding Status

Ninety-three percent of Core grantees were receiving funding from the Foundation at the time they completed the survey.



Grantees Previously Declined Funding

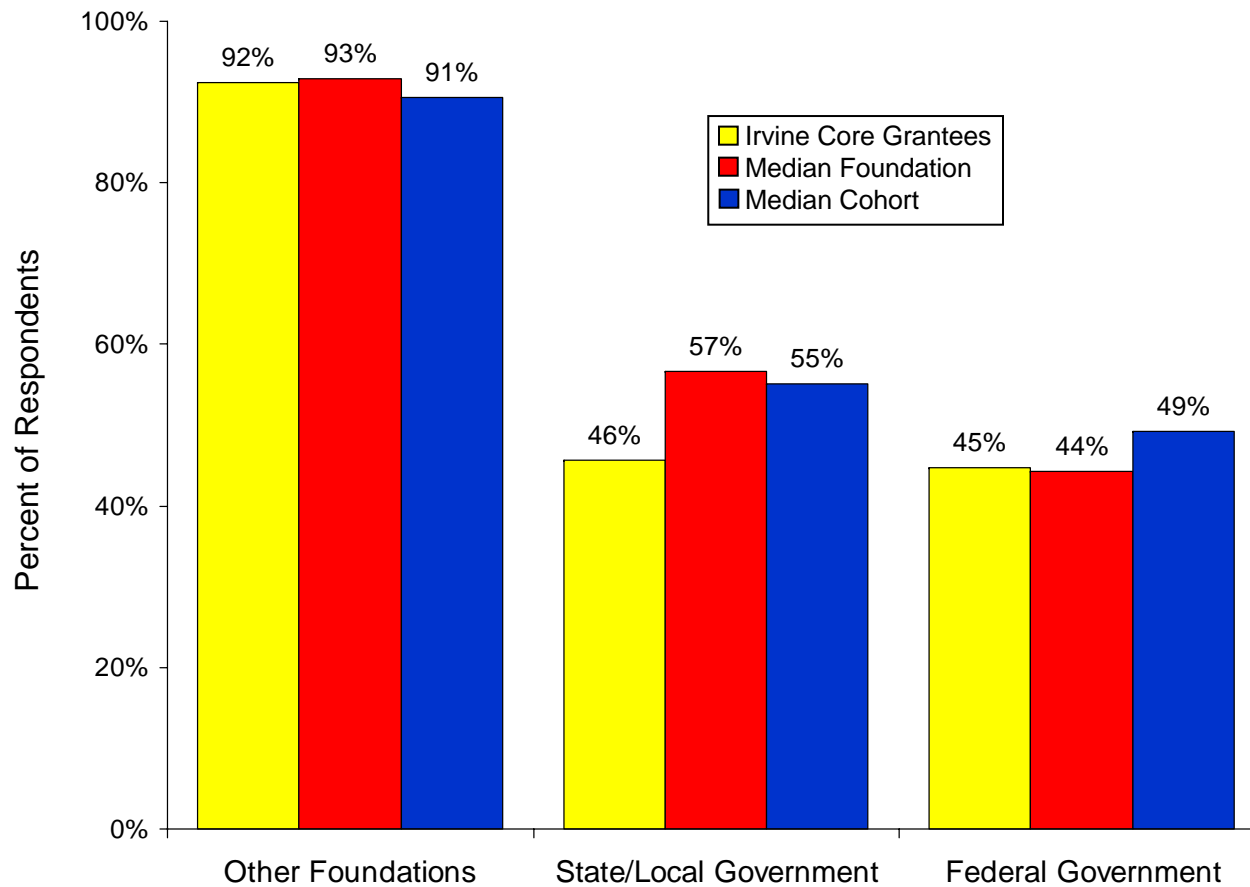
Thirty percent of Irvine Core grantee respondents report having previously been declined funding from the Foundation, a typical proportion.



Other Sources of Grants

A smaller proportion of Core grantees report receiving funding from state and local governments than grantees of the typical foundation and median cohort foundation

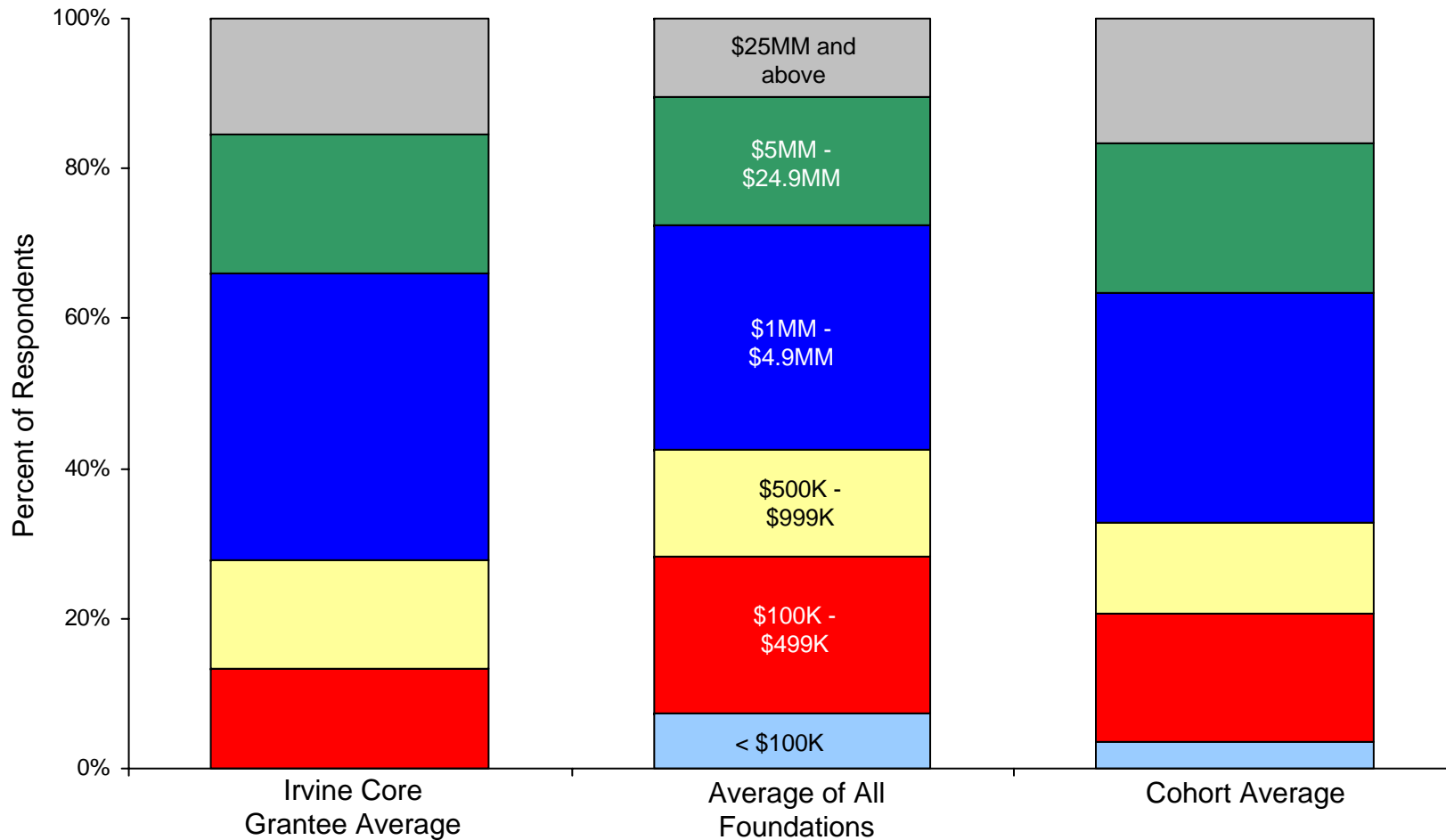
Other Funding Sources Providing Grants



Grantee Operating Budget

At the median, Core grantees have larger operating budgets than grantees of other foundations in the sample and similar operating budgets as grantees of the comparative cohort.

Grantee Operating Budget



Population Average
Population Median

\$15.9MM

\$1.8MM

\$58.0MM

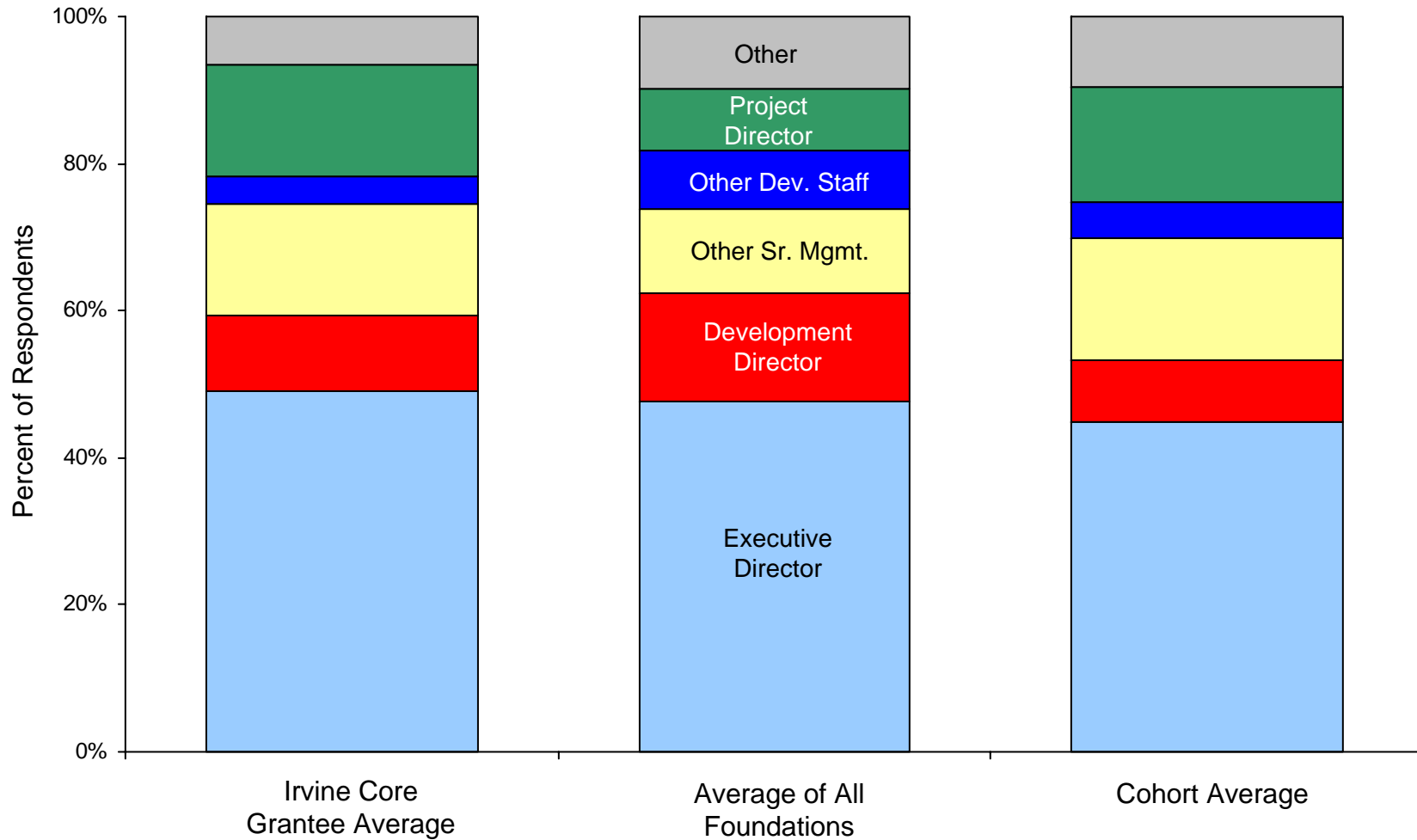
\$1.3MM

\$93.4MM

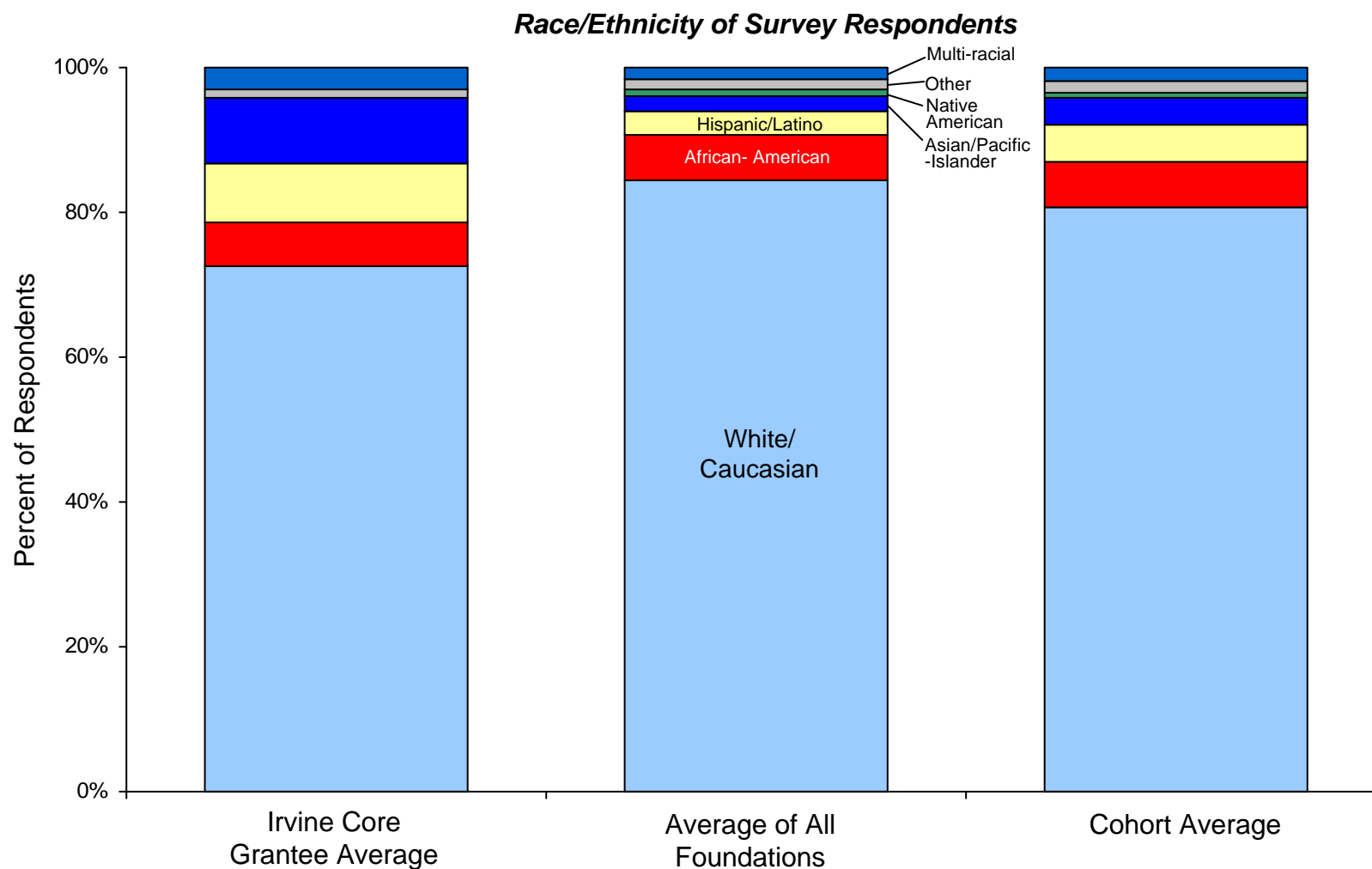
\$2.0MM

Job Title of Respondents

Job Title of Survey Respondents

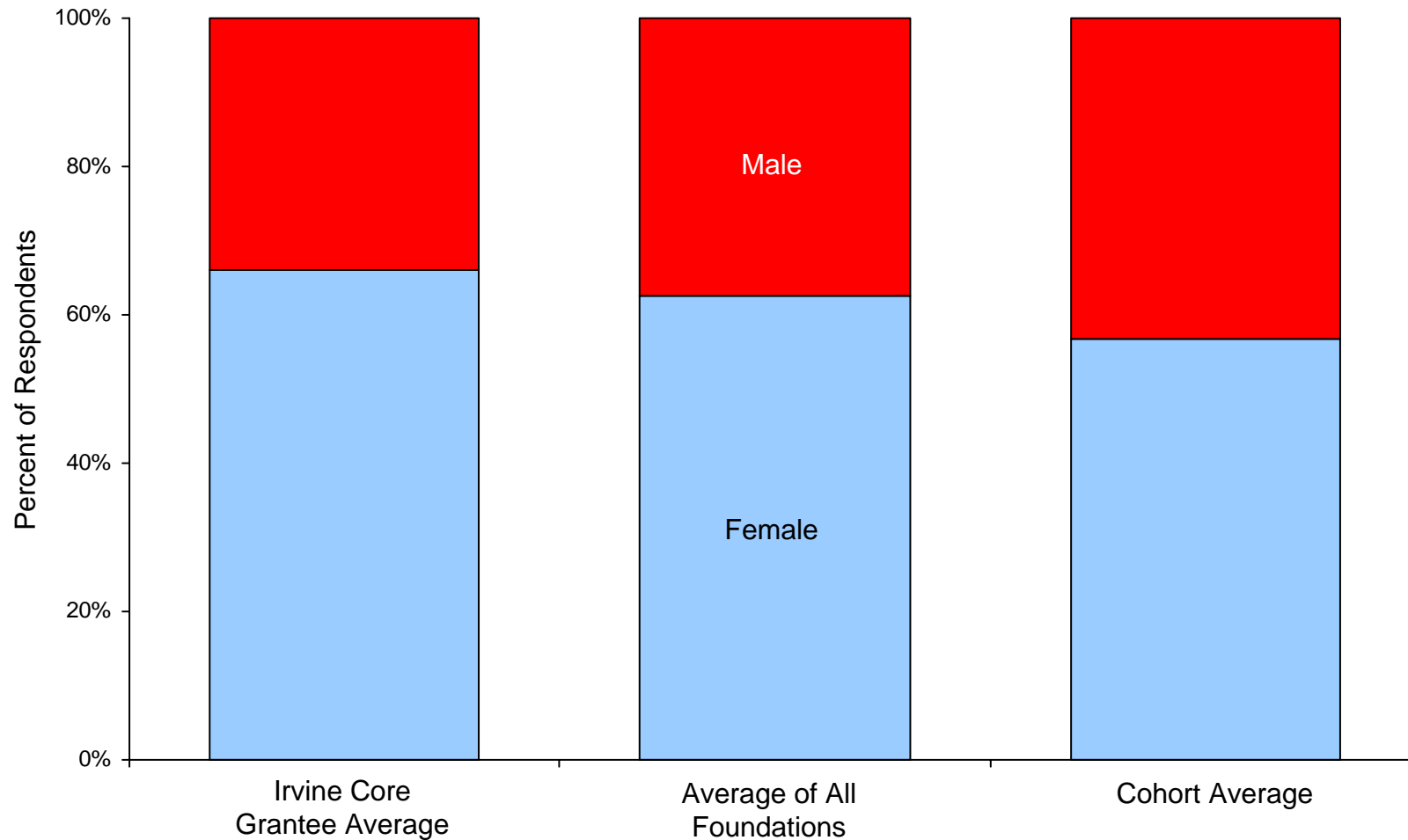


Race/Ethnicity of Respondents



Gender of Respondents

Gender of Survey Respondents



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Foundations Included in Comparative Set (1)

The 143 foundations whose grantee ratings are included in the comparative set of this Grantee Perception Report are:

The Abell Foundation, Inc.	Bush Foundation*
Adolph Coors Foundation	The California Endowment*
The Ahmanson Foundation	The Cannon Foundation, Inc.
Alphawood Foundation	Carrie Estelle Doheny Foundation
The Altman Foundation	The Case Foundation*
The Ambrose Monell Foundation	The Champlin Foundations
Amelia Peabody Foundation	Charles and Helen Schwab Foundation*
Amon G. Carter Foundation	Charles and Lynn Schusterman Family Foundation*
Andersen Foundation	Charles Stewart Mott Foundation*
Ann Arbor Area Community Foundation*	The Christensen Fund*
The Annenberg Foundation	Claude Worthington Benedum Foundation*
The Anschutz Foundation	The Clowes Fund*
The Assisi Foundation of Memphis, Inc.*	The Collins Foundation
The Atlantic Philanthropies*	Community Foundation Silicon Valley* ¹
The AVI CHAI Foundation*	Community Memorial Foundation*
Baptist Community Ministries	Connecticut Health Foundation*
Bill & Melinda Gates Foundation*	The David and Lucile Packard Foundation*
Blandin Foundation*	Dekko Foundation, Inc.
Blue Cross Blue Shield of Massachusetts Foundation*	Doris Duke Charitable Foundation*
Blue Shield of California Foundation*	The Duke Endowment*
The Boston Foundation*	E. Rhodes & Leona B. Carpenter Foundation
Bradley Foundation	East Bay Community Foundation*
Bradley-Turner Foundation	Eden Hall Foundation
The Broad Foundation*	El Pomar Foundation

* : GPR subscriber

1: At the time of the survey, Community Foundation Silicon Valley had not become Silicon Valley Community Foundation.

Foundations Included in Comparative Set (2)

Endowment for Health*
Evelyn and Walter Haas, Jr. Fund*
The Fan Fox and Leslie R. Samuels Foundation
Fannie Mae Foundation*
France-Merrick Foundation
The Frist Foundation
The GAR Foundation*
Gates Family Foundation
Gaylord and Dorothy Donnelley Foundation*
The George Gund Foundation*
The Gill Foundation
Gordon and Betty Moore Foundation*
The Grable Foundation*
Grand Rapids Community Foundation*
Gulf Coast Community Foundation of Venice*
Hall Family Foundation
Hartford Foundation for Public Giving*
The Health Foundation of Greater Cincinnati*
The Heinz Endowments*
Hess Foundation, Inc.
HRJ Consulting (for an anonymous foundation)*
The Hyams Foundation*
The J. Willard and Alice S. Marriott Foundation
The James Irvine Foundation*

The Jay and Rose Phillips Family Foundation
Jessie Smith Noyes Foundation*
The John A. Hartford Foundation, Inc.
The John D. and Catherine T. MacArthur Foundation*
John P. McGovern Foundation
The John R. Oishei Foundation*
Kalamazoo Community Foundation*
Kansas Health Foundation*
The Lenfest Foundation, Inc.
Levi Strauss Foundation*
The Louis Calder Foundation
Lucile Packard Foundation for Children's Health*
Lumina Foundation for Education*
Maine Health Access Foundation*
Marguerite Casey Foundation*
The McKnight Foundation*
Medina Foundation*
Michael Reese Health Trust*
The Minneapolis Foundation*
Missouri Foundation for Health*
The Morris and Gwendolyn Cafritz Foundation
The Mt. Sinai Health Care Foundation*
The Nathan Cummings Foundation*
New Hampshire Charitable Foundation*

Foundations Included in Comparative Set (3)

The New York Community Trust*	S & G Foundation, Inc.
Nord Family Foundation*	S. H. Cowell Foundation*
Omidyar Foundation* ¹	The Saint Paul Foundation*
The Overbrook Foundation	Santa Barbara Foundation*
Partnership for Excellence in Jewish Education (PEJE)*	Shelton Family Foundation
Paul G. Allen Foundations* ¹	Skoll Foundation*
Peninsula Community Foundation* ¹	Stuart Foundation*
PetSmart Charities*	Surdna Foundation*
The Philadelphia Foundation*	T.L.L. Temple Foundation
Polk Bros. Foundation*	The Vermont Community Foundation*
Quantum Foundation	Victoria Foundation, Inc.
The Ralph M. Parsons Foundation	The Virginia G. Piper Charitable Trust*
Rasmuson Foundation*	W.K. Kellogg Foundation*
The Rhode Island Foundation*	Waitt Family Foundation
Richard M. Fairbanks Foundation*	The Wallace Foundation*
Robert R. McCormick Tribune Foundation	Wellington Management Charitable Fund*
Robert Wood Johnson Foundation*	Wilburforce Foundation*
Robin Hood Foundation*	The William and Flora Hewlett Foundation*
Rockefeller Brothers Fund*	The William Stamps Farish Fund
The Rockefeller Foundation*	William T. Kemper Foundation
Rollin M. Gerstacker Foundation	Windgate Charitable Foundation, Inc.
Rose Community Foundation*	Winter Park Health Foundation*
The Russell Family Foundation*	Woods Fund of Chicago*
Ruth Mott Foundation*	

* : GPR subscriber

1: At the time of the survey, Omidyar Foundation had not become The Omidyar Network; the Paul G. Allen Foundations had not become the Paul G. Allen Family Foundations; and Peninsula Community Foundation had not become Silicon Valley Community Foundation.

Foundations Previously Included in Comparative Set

In 2003, CEP surveyed the grantees of the following foundations. The average responses for these foundations are not included in the comparative set because CEP has opted to provide only more recently collected data – that which was collected over the last six survey rounds (three years) – in Grantee Perception Reports.

Alfred P. Sloan Foundation
Barr Foundation*
The Brown Foundation, Inc.*
The California Wellness Foundation
Carnegie Corporation of New York*
The Clark Foundation
The Cleveland Foundation*
The Columbus Foundation*
Daniels Fund
The Dyson Foundation*
The Educational Foundation of America
F. M. Kirby Foundation, Inc.
The F.B. Heron Foundation*
The Ford Family Foundation*
The George S. and Dolores Dore Eccles Foundation
Geraldine R. Dodge Foundation
The Goizueta Foundation*
The Greater Cincinnati Foundation*
The Harry and Jeanette Weinberg Foundation, Inc.
Horace W. Goldsmith Foundation
Houston Endowment Inc.*
J. A. & Kathryn Albertson Foundation
J. Bulow Campbell Foundation

James Graham Brown Foundation, Inc.
Jessie Ball duPont Fund*
Kate B. Reynolds Charitable Trust
Kronkosky Charitable Foundation*
Longwood Foundation
Mathile Family Foundation
Meyer Memorial Trust
Nina Mason Pulliam Charitable Trust*
The Pew Charitable Trusts
Pritzker Foundation
Public Welfare Foundation
Richard & Rhoda Goldman Fund*
Richard King Mellon Foundation
SC Ministry Foundation*
The Sherman Fairchild Foundation, Inc.
The Shubert Foundation
The Skillman Foundation
Wayne & Gladys Valley Foundation*
Weingart Foundation
The William K. Warren Foundation
The William Penn Foundation*
The William Randolph Hearst Foundations
Z. Smith Reynolds Foundation

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About the Center for Effective Philanthropy (CEP)

Mission

To provide management and governance tools to define, assess, and improve foundation performance.

Vision

A world in which pressing social needs are more effectively addressed. We believe improved performance of foundations can have a profoundly positive impact on non-profit organizations and the people and communities they serve.

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:

Bill & Melinda Gates
Foundation

Charles Stewart Mott Foundation

The David and Lucile Packard
Foundation

THE
Edna McConnell
Clark FOUNDATION

Gordon and Betty
MOORE
FOUNDATION

KAUFFMAN
Foundation

LUMINA®
FOUNDATION FOR EDUCATION

MACARTHUR

OMIDYAR
NETWORK

Robert Wood Johnson Foundation

Rockefeller
Brothers Fund
Philanthropy for an Interdependent World

STUART FOUNDATION
INVESTING IN CHILDREN & YOUTH

SURDNA
FOUNDATION

THE WILLIAM
AND FLORA HEWLETT
FOUNDATION

CEP Research

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

- **Overall Performance Assessment**
- **Foundation Program Strategy**
- **Foundation Governance**
- **Foundation-Grantee Relationships**
- **Operational Benchmarking**

CEP Assessment Tools

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

- **Grantee Perception Report® (GPR):** an assessment tool that provides foundation CEOs, boards, and staff with comparative data on grantee perceptions of foundation 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):** a self-assessment tool for foundations that provides data on board structure and trustee perceptions of board effectiveness
- **Staff Perception Report (SPR):** explores foundation staff members' perceptions of foundation effectiveness and job satisfaction on a comparative basis
- **Operational Benchmarking Report (OBR):** provides comparative data, relative to a selected peer group of foundations, on aspects of foundation operations – including foundation staffing, program officer workload, grant processing times, and administrative costs
- **Multidimensional Assessment Process (MAP):** provides foundations with an integrated assessment of performance based on comparative data collected from a variety of different sources, including grantees, declined applicants, foundation staff, and foundation board members

Contact Information

- ◆ This report was produced for The James Irvine Foundation by the Center for Effective Philanthropy in February, 2007.

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