



## GRANTEE PERCEPTION REPORT FINDINGS AND FOLLOW-UP

Last year, Wilburforce Foundation commissioned the Center for Effective Philanthropy (CEP) to survey our grantees and prepare a *Grantee Perception Report*.

Wilburforce values feedback from the groups we serve. We conducted our own grantee satisfaction surveys in 1997 and 2001, and commissioned our first Grantee Perception Report in 2004. The benefit of working with CEP is that Wilburforce's performance is compared to data collected on other foundations, including a subset of foundations that have environmental programs.

CEP surveyed 138 Wilburforce grant recipients from 2006 and 99 completed surveys were received. Due to the high level of response (72%), we are confident that the findings presented in the report accurately represent the perceptions of our grantees.

Most of the Grantee Perception Report affirmed that we're doing well in areas that are important to us, including:

- Impact on grantee organizations
- Grantee satisfaction
- Quality of interactions
- Clarity of communications about our goals and strategy
- Non-monetary assistance
- Assistance securing other funding
- Impact on the field

When we last commissioned a Grantee Perception Report in 2004, we identified two areas in which the findings prompted reconsideration of our practices:

- Dollar return on grantee administrative hours: In 2004, we learned that our application process required an average amount of time to complete compared to other foundations, but we awarded smaller grants, increasing the administrative cost per dollar raised. The new findings suggest that our efforts to streamline our application and reporting processes have helped put us more in line with our foundation peers. We think we can do even better, and will strive to find ways to continue to ease the burden we place on grantees while still gathering the information we need to be effective partners.
- Selection process: In 2004, we learned that Wilburforce Foundation awarded fewer multiple-year grants than other foundations, even though we tend to have longer-term relationships with grantees. We're doing better, but hope to continue to increase our ratio of multiple-year commitments over time.

In addition to our responses to overall findings, each of Wilburforce's program officers received perception rating data and narrative responses from grantees in the regions in which they fund. This will help them make improvements that are relevant to their work in each of our program areas.

The Center for Effective Philanthropy protected the confidentiality of individual grantee responses. Results were presented in aggregate and open-ended comments were stripped of any identifying language. Grantees were also given the option of responding anonymously.

We appreciate the participation and candor of our grantees, who we are proud to serve in their work to protect wildlands and wildlife.

For more information about Wilburforce's Grantee Perception Report, please contact Paul Beaudet at 206/632-2325, or by email at [paul@wilburforce.org](mailto:paul@wilburforce.org).

# Grantee Perception Report®

prepared for

## Wilburforce Foundation

Fall 2007

VERSION 2/05/07



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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), *Foundation Communications: The Grantee Perspective* (2006), and *In Search of Impact: Practices and Perceptions in Foundations' Provision of Program and Operating Grants to Nonprofits* (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.**
  - Overall, assessing foundation performance is challenging and a range of data sources is required. The GPR provides one set of perspectives that can be particularly useful in understanding foundation performance
  - It is important to note that, on most questions, grantee ratings cluster toward the high end of an absolute scale.
  - Grantee perceptions must be interpreted in light of the 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 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.<sup>1</sup>
  - CEP surveyed 138 fiscal year 2006 grantees of Wilburforce Foundation (“Wilburforce”) during September and October 2007. CEP received 99 completed responses, a 72 percent response rate.
  - CEP surveyed 148 fiscal year 2003 grantees of Wilburforce during February and March 2004. CEP received 122 completed responses, a 82 percent response rate. Whenever possible, these grantees’ responses are shown.
  - The average and/or median rating for these respondents is shown throughout this report.
  - Grantees submitted responses via the Web.<sup>2</sup>
  
- ◆ Wilburforce 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, for the general population of grantees across foundations.

## Methodology (2)

- ♦ Wilburforce is also compared to a cohort of environmental programs/funders chosen by the Foundation to represent its peers. The 12 environmental programs that comprise this group are:
  - The Nathan Cummings Foundation – Environment/Contemplative Practice Program
  - Geraldine R. Dodge Foundation – Environment Program
  - The Heinz Endowments – Environment Program
  - The William and Flora Hewlett Foundation – Environment Program
  - John D. and Catherine T. MacArthur Foundation – Conservation and Sustainable Development Program
  - Gordon and Betty Moore Foundation – Environment Program
  - Charles Stewart Mott Foundation – Environment Program
  - The David and Lucile Packard Foundation – Conservation and Science Program
  - Rockefeller Brothers Fund – Sustainable Development Program
  - Russell Family Foundation – Environmental/Sustainability Fund
  - Surdna Foundation – Environment Program
  - Wilburforce Foundation – all grantmaking

# Key Findings

Across most dimensions on the grantee survey, Wilburforce Foundation is rated highly by its grantees. The Foundation is rated above 90 percent of foundations in the comparative set on several key measures including its impact on and understanding of grantees' fields, its impact on grantee organizations and understanding of their goals and strategies, and the impact of its funding on the ability of grantees to sustain their work. Wilburforce grantees are more satisfied with the Foundation than typical.

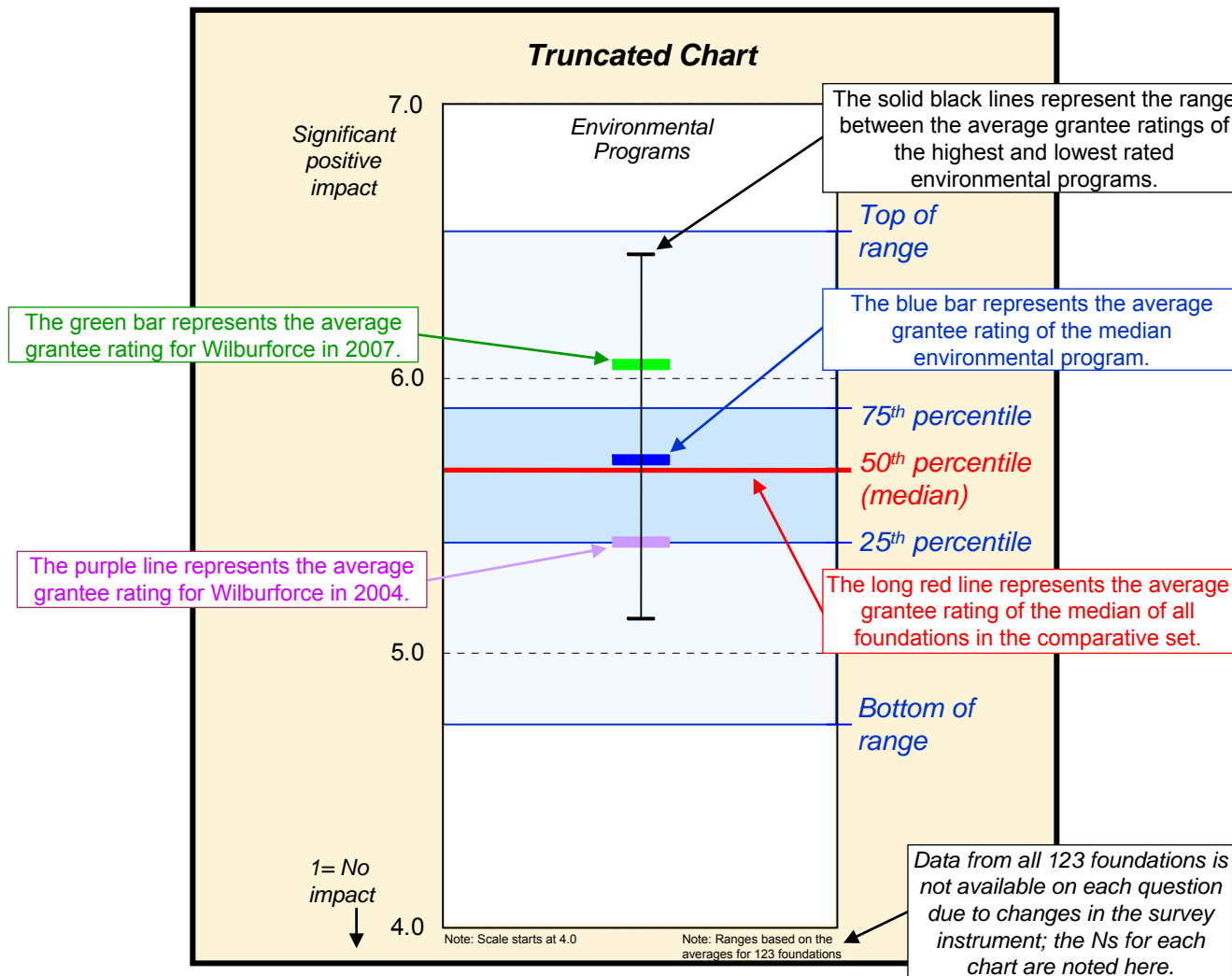
On several dimensions, grantees in 2007 rate the Foundation significantly<sup>1</sup> more positively than they did in 2004. The Foundation is rated higher for its understanding of grantee organizations and grantees' local communities, grantees' overall satisfaction, and quality of interactions with the Foundation. On no measures has the Foundation's ratings decreased significantly compared to 2004.

On the quality of the Foundation's interactions – comfort approaching the Foundation if a problem arises, responsiveness of Foundation staff, and the fairness with which the Foundation treats its grantees – Wilburforce is rated above 90 percent of foundations. In responses to open-ended questions, grantees speak very positively about the Foundation's staff and frequently describe them as “collaborators” and “trusting and supportive.” Wilburforce is also rated above the median foundation for the clarity of its communication of its goals and strategy and the consistency of its communications resources – both personal and written.

The Foundation provides sixty-five percent of grantees with non-monetary assistance and sixty percent with assistance securing funding from other sources – both larger than typical proportions. The helpfulness of the Foundation's selection process is similar to that of the median foundation and the helpfulness of its evaluation process is rated more positively than typical. The Foundation's selection and evaluation processes require as much time of grantees as is typical and Wilburforce's grants are similar in size to those of the median foundation. This results in a typical number of grant dollars received by grantees for each hour spent on completing the Foundation's administrative requirements.

# Reading GPR Charts

Much of the grantee perception data in the GPR is presented in the format below. These graphs show the average of grantee responses for Wilburforce, over a background that shows percentiles for the average ratings for the full comparative set of 123 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 absolute range.**



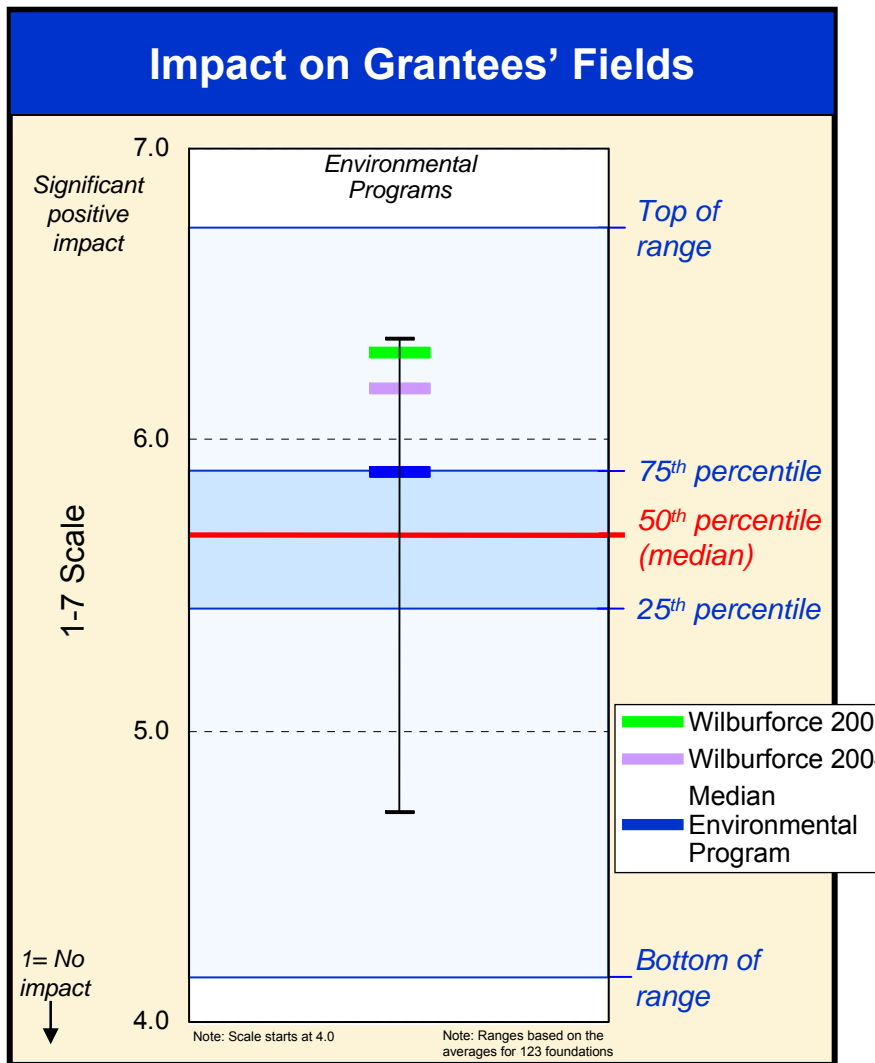
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# Impact on Grantees' Fields

On impact on grantees' fields, Wilburforce is rated:

- higher than ninety percent of surveyed foundations
- above the median environmental program



## Selected Grantee Comments

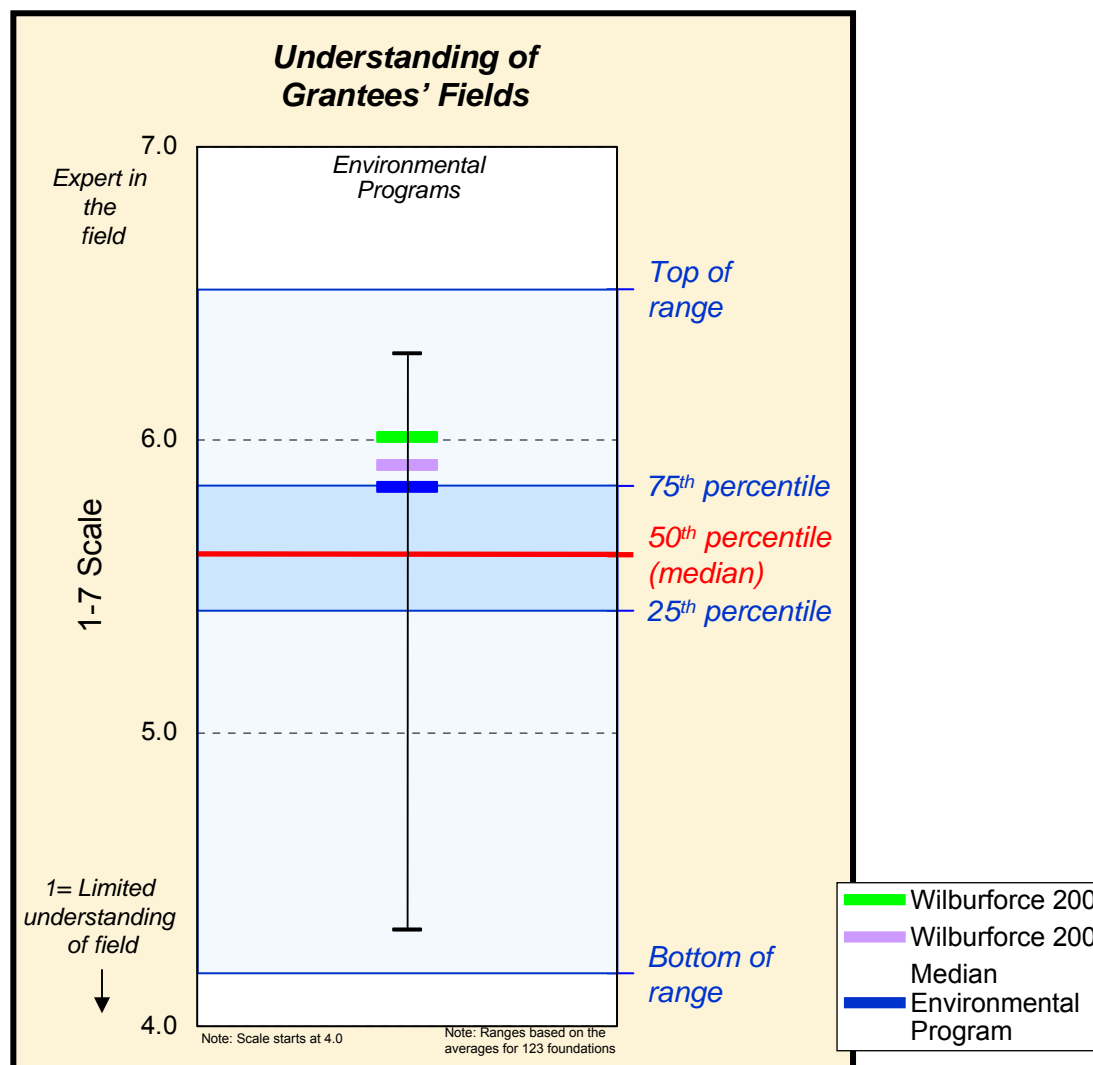
- ♦ *“Wilburforce has been one of a handful of foundations that have invested significantly in an innovative conservation strategy, and have really stretched themselves to provide the support and encouragement we all needed to make it work! In so doing, together we have created a new model of conservation that, we all hope, will be replicated in other regions.”*
- ♦ *“By supporting a wide range of grassroots wilderness campaigns and organizations and [by] providing professional development for individuals and organizations, Wilburforce Foundation has made the wilderness movement a stronger, more effective and successful force. Their contribution has been enormous.”*
- ♦ *“The Foundation is definitely a player in the world of public lands and western policy. Their funding seems strategic and focused, and therefore makes an impact.”*
- ♦ *“I think their impact on public policy in the conservation community has been significant. They are strategic with their funding and understand who is doing what and how it all fits together. It makes a huge difference.”*

Note: This question includes a “don’t know” response option; 2 percent of Wilburforce respondents answered “don’t know” in 2007 compared to 10 percent at the median foundation, 4 percent of Wilburforce respondents in 2004, and 5 percent at the median environmental program.

# Understanding of Grantees' Fields

On understanding of grantees' fields, Wilburforce is rated:

- higher than ninety percent of surveyed foundations
- above the median environmental program



Note: This question includes a "don't know" response option; 0 percent of Wilburforce respondents answered "don't know" in 2007 compared to 8 percent at the median foundation, 4 percent of Wilburforce respondents in 2004, and 3 percent at the median environmental program.

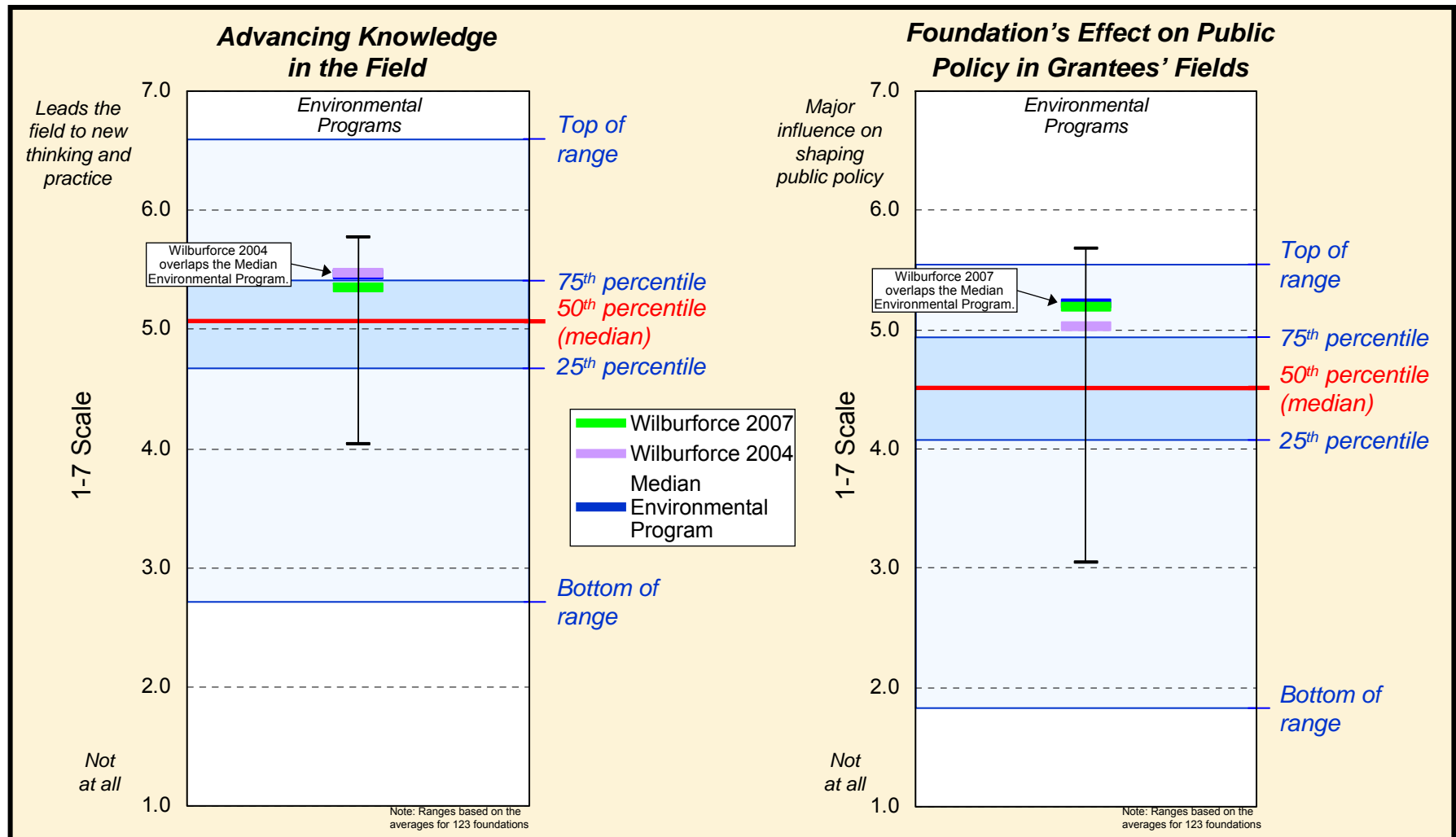
# Advancing Knowledge in Fields and Effect on Public Policy

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

- above the median foundation
- similarly to the median environmental program

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

- above the median foundation
- similarly to the median environmental program

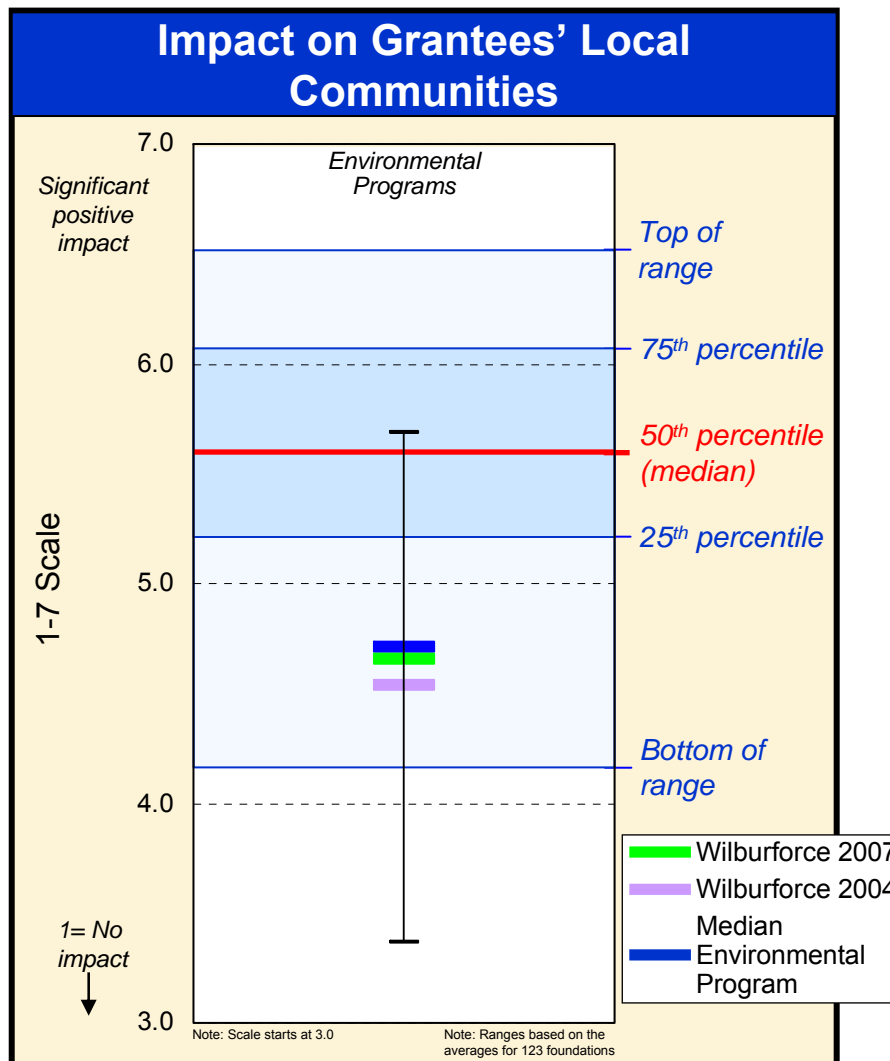


Note: The questions depicted on these charts include a "don't know" response option. In the left-hand chart, 14 percent of Wilburforce respondents answered "don't know" in 2007 compared to 27 percent at the median foundation, 18 percent of Wilburforce respondents in 2004, and 15 percent at the median environmental program. In the right-hand chart 19 percent of Wilburforce respondents answered "don't know" in 2007 compared to 43 percent at the median foundation, 32 percent of Wilburforce respondents in 2004, and 20 percent at the median environmental program.

# Impact on Grantees' Local Communities

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

- lower than ninety percent of surveyed foundations
- similarly to the median environmental program



## Selected Grantee Comments

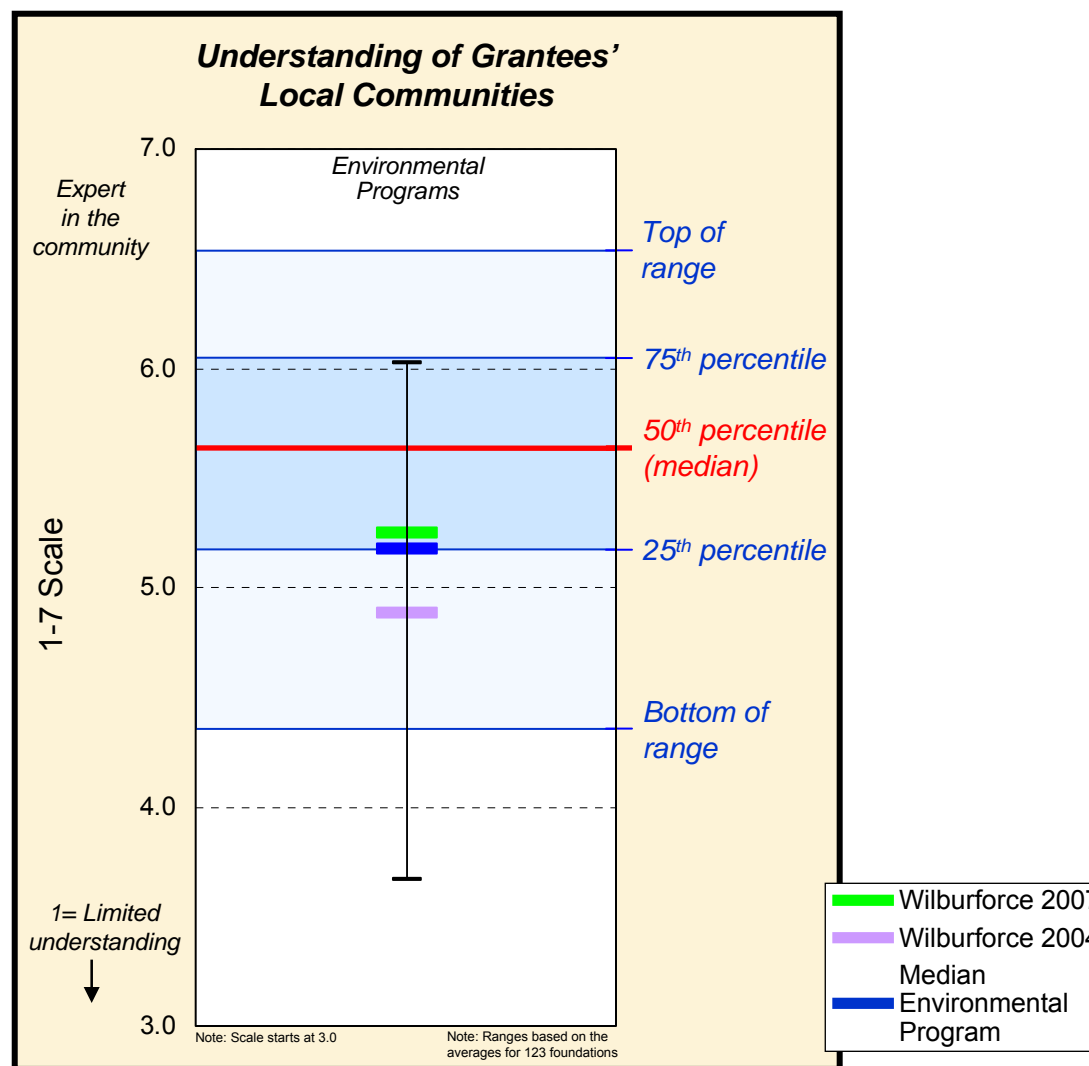
- ♦ “Wilburforce has had a significant impact on mining policy and research on a national level, but less impact at the regional and local levels.”
- ♦ “Wilburforce’s strategic funding design is effective and smart – i.e. target money into regional strategies where cumulative investments have the possibility of building lasting change and impact. This approach has had a significant effect on the ... region, where their investments have built important non-profit capacity and infrastructure, and helped spur the evolution of strong trans-boundary, community-based partnerships and relationships.”
- ♦ “I think they could burrow a bit deeper into what is happening here.”
- ♦ “Wilburforce, through many of the programs, adds to the effectiveness of numerous groups working in Alaska, impacting a range of issues across a wide geographic area.”
- ♦ “Wilburforce has had huge impact on Yellowstone to Yukon, which is the frame for many people’s work.”

Note: This question includes a “don’t know” response option; 27 percent of Wilburforce respondents answered “don’t know” in 2007 compared to 11 percent at the median foundation, 14 percent of Wilburforce respondents in 2004 and 27 percent at the median environmental program.

# Understanding of Grantees' Local Communities

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

- below the median foundation
- similarly to the median environmental program



Note: This question includes a "don't know" response option; 18 percent of Wilburforce respondents answered "don't know" in 2007 compared to 14 percent at the median foundation, 12 percent of Wilburforce respondents in 2004, and 28 percent at the median environmental program.

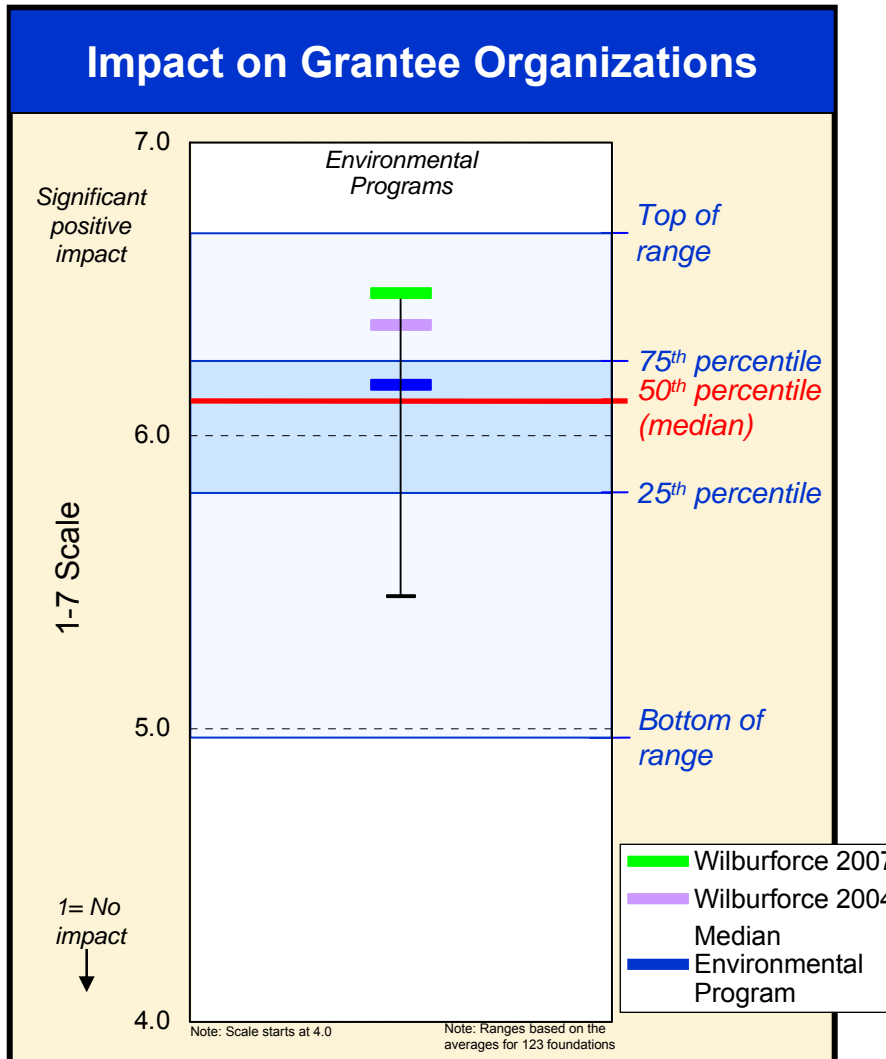
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# Impact on Grantee Organizations

On impact on grantee organizations, Wilburforce is rated:

- higher than ninety percent of surveyed foundations
- higher than all environmental programs



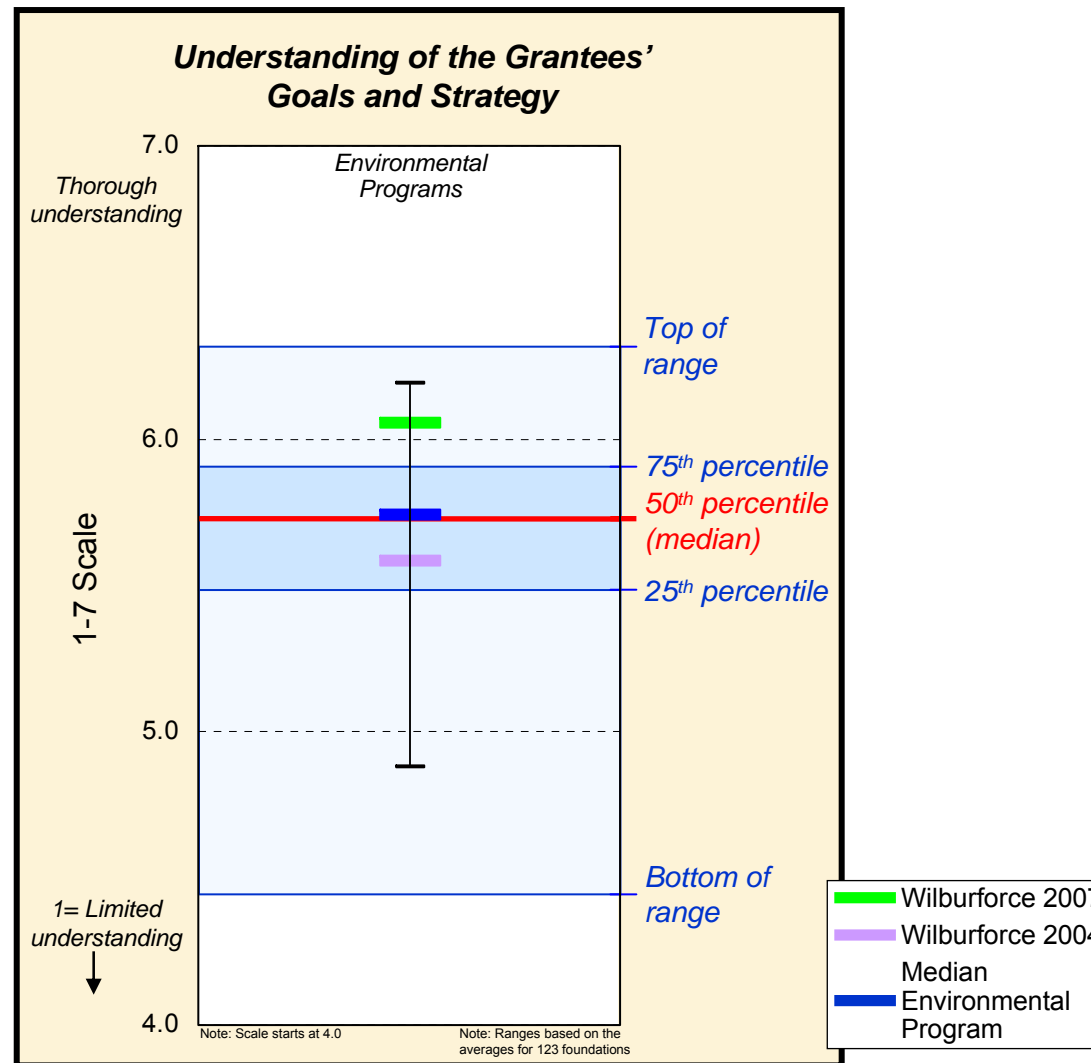
## Selected Grantee Comments

- ♦ “The most valuable and unique feature of the Foundation is the communication with the program staff. They are very clear about what their funding priorities are and dedicated to ... the forward movement of those priorities. We value much more about this foundation than the money that they provide including their advice, leadership, and engagement.”
- ♦ “Wilburforce is one of the best foundations we work with. Staff understands our issues and personnel, actively engages with us and offers support to deal with issues as they arise.”
- ♦ “What has been most helpful has been the long-term investment the Foundation has made in our work. The grants have not been huge, but they are significant nonetheless, and the fact that we have had several years of funding from the Foundation without interruption has been hugely beneficial.”
- ♦ “Wilburforce provides ‘grown up’ support as opposed to ‘giving us our allowance’ support. By that I mean bigger checks, higher expectations, and more sophisticated personal relationships. If we’re going to win it has to be grown up work.”

# Understanding of Grantees' Goals and Strategy

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

- higher than ninety percent of surveyed foundations
- above the median environmental program

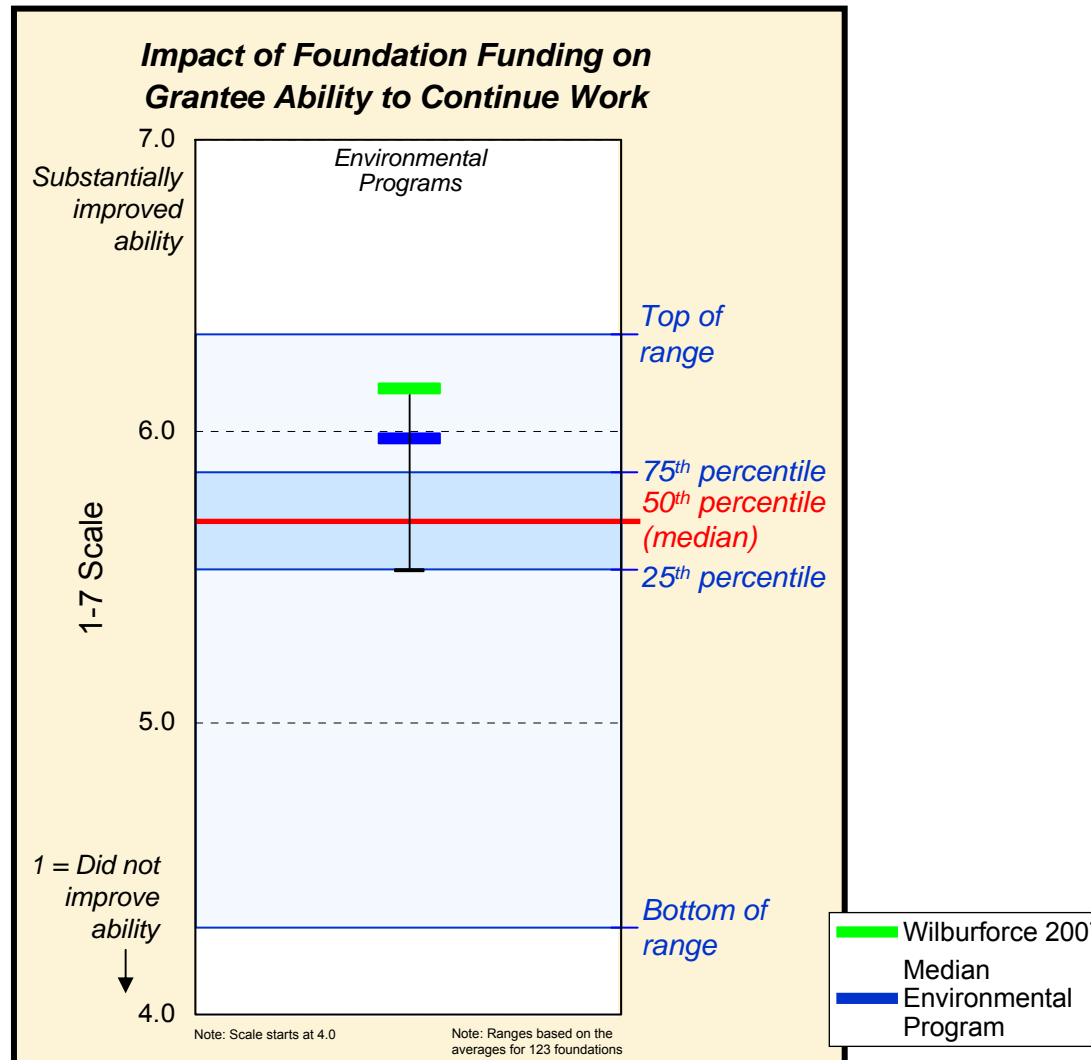


Note: This question includes a "don't know" response option; 2 percent of Wilburforce respondents answered "don't know" in 2007 compared to 8 percent at the median foundation, 6 percent of Wilburforce respondents in 2004, and 3 percent at the median environmental program.

# Impact on Sustainability of Funded Work

On the effect of the Foundation's funding on grantees' ability to sustain their work in the future, Wilburforce is rated:

- higher than ninety percent of surveyed foundations
- higher than all environmental programs



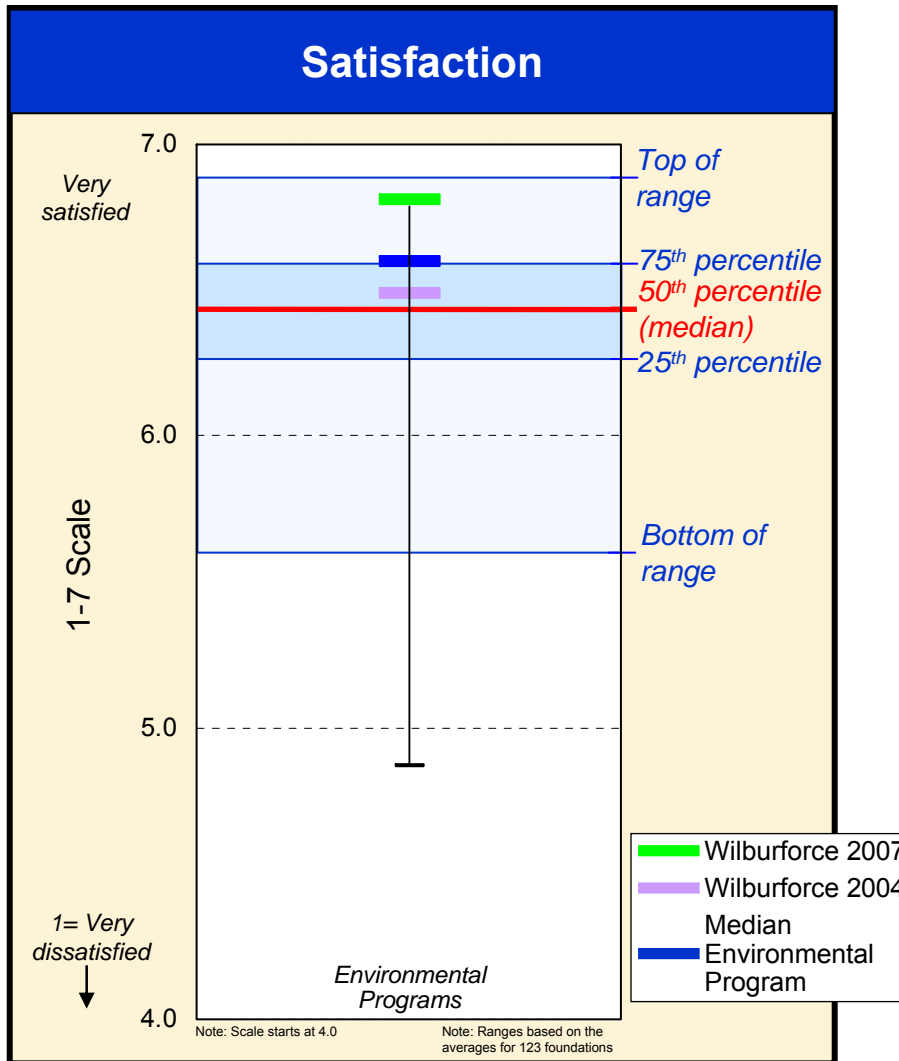
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# Satisfaction

On overall satisfaction, Wilburforce is rated:

- higher than ninety percent of surveyed foundations
- higher than all environmental programs



## Selected Grantee Comments

- ♦ *“Wilburforce is a model foundation for understanding that philanthropy is a critical part but not the only important part of the conservation mix. The staff are respectful, informed, and committed to working together with grantees, not pretending to have superior judgment simply because they give away money. I wish there were more Wilburforces.”*
- ♦ *“Wilburforce Foundation is clear in their goals, and that clarity transfers to their dealings with grantees. They know what information they need to make their decisions and yet they don’t overly burden grantees with unnecessary hoops to jump through. They are the most pleasurable foundation to work with of any that fund us.”*

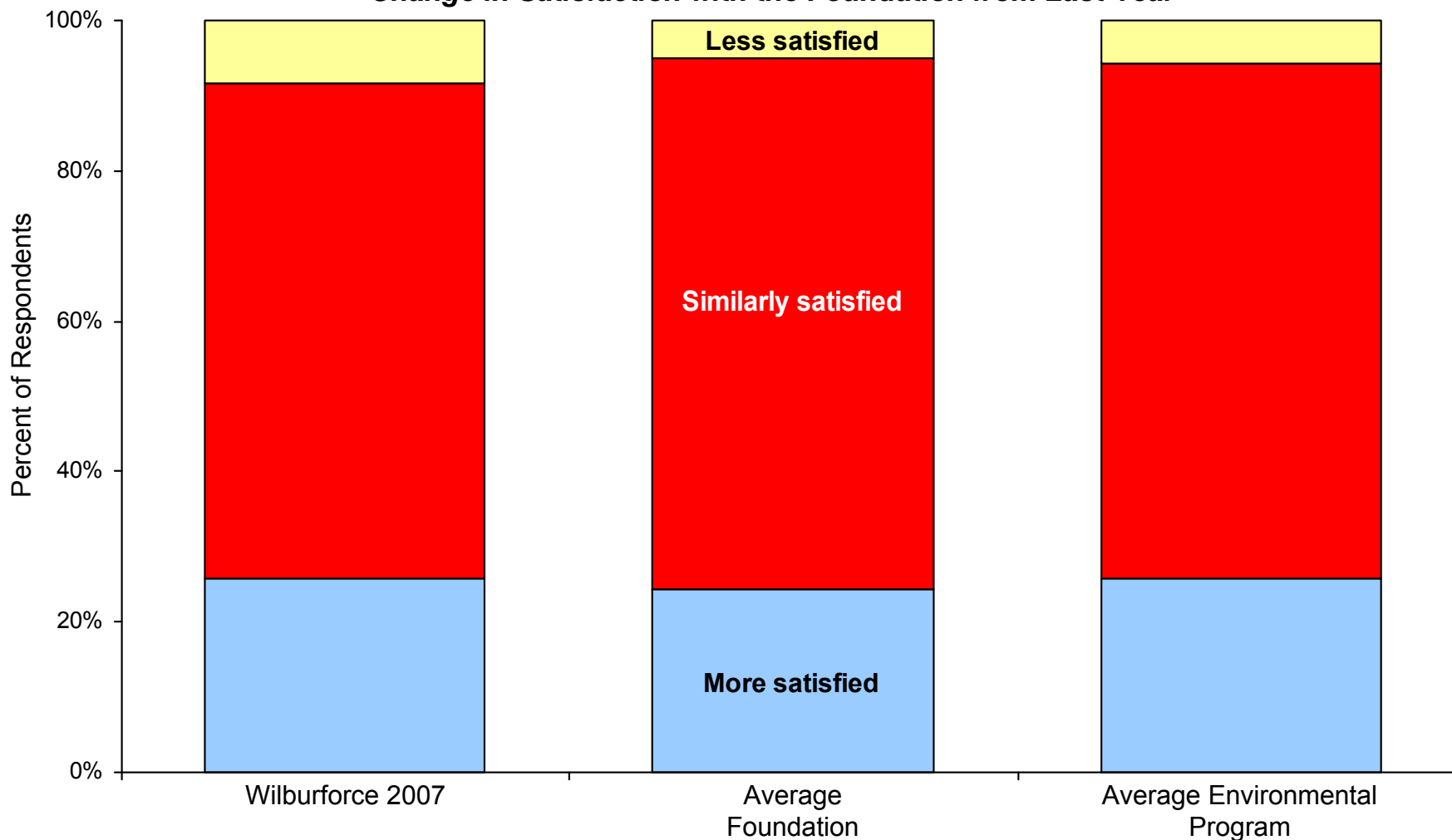
**Survey-Wide Analysis Fact:** Three dimensions best predict grantee perceptions of satisfaction with their foundation funders: 1) *Quality of Interactions with Foundation Staff:* fairness, responsiveness, approachability; 2) *Clarity of Communication of a Foundation’s Goals and Strategy:* clear and 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 proportion of Wilburforce grantees that are more satisfied this year with the Foundation than they were last year is:

- similar to that of the average foundation
- similar to the average environmental program

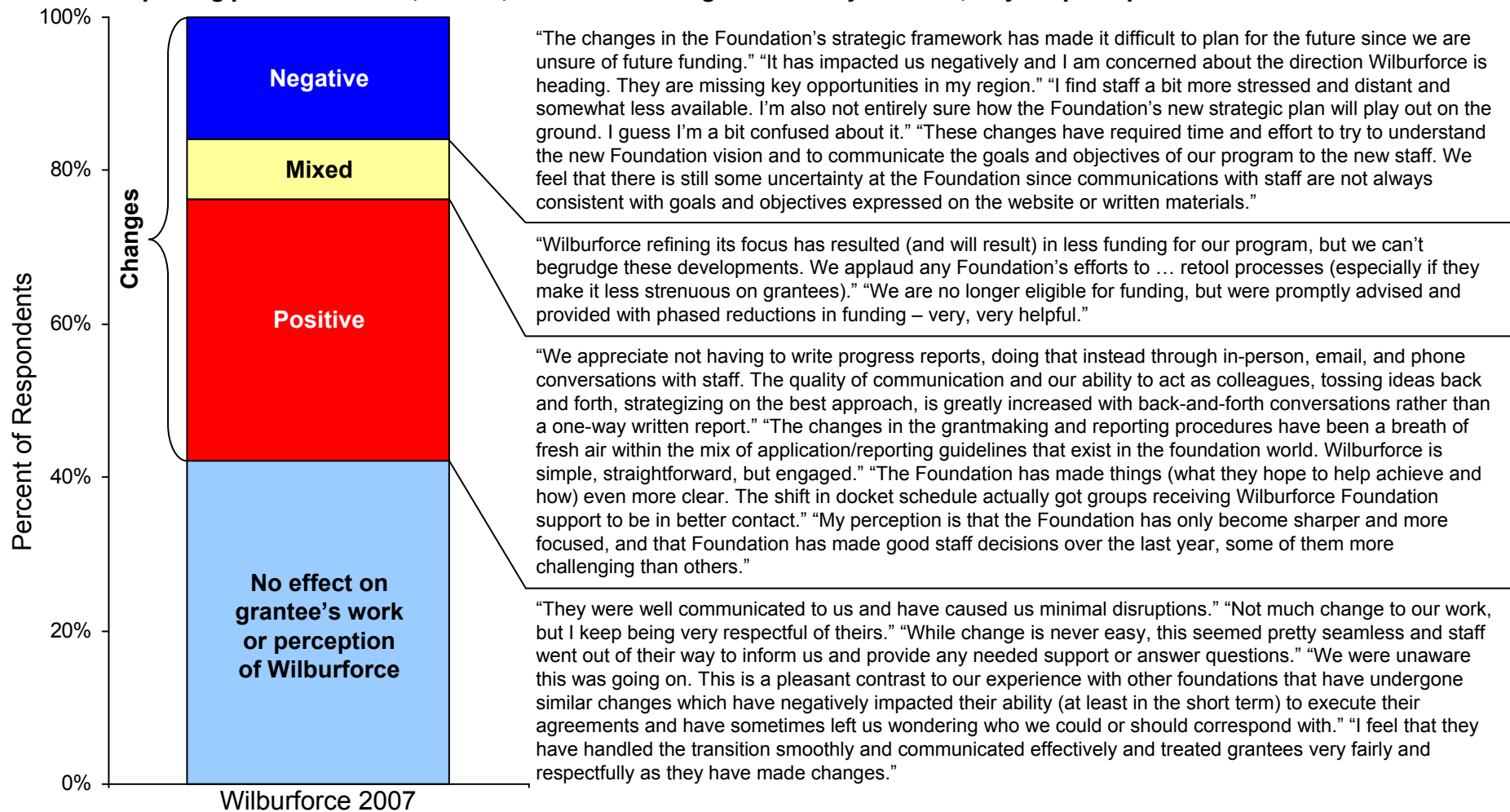
**Change in Satisfaction with the Foundation from Last Year**



# Grantee Perceptions of Transitions at Wilburforce

Grantees were asked to indicate how changes at Wilburforce Foundation have affected their work or their perception of Wilburforce Foundation. Over 75 percent of grantees reported that the changes have had no effect on their work or perception of Wilburforce or that the changes have been positive.

***“This has been a time of transition at Wilburforce Foundation, with changes that include: recently promoted and newly hired staff; refinements to its strategic framework; shifts in the docket schedule; and revised grant application and reporting processes. How, if at all, have these changes affected your work, or your perceptions of Wilburforce?”***



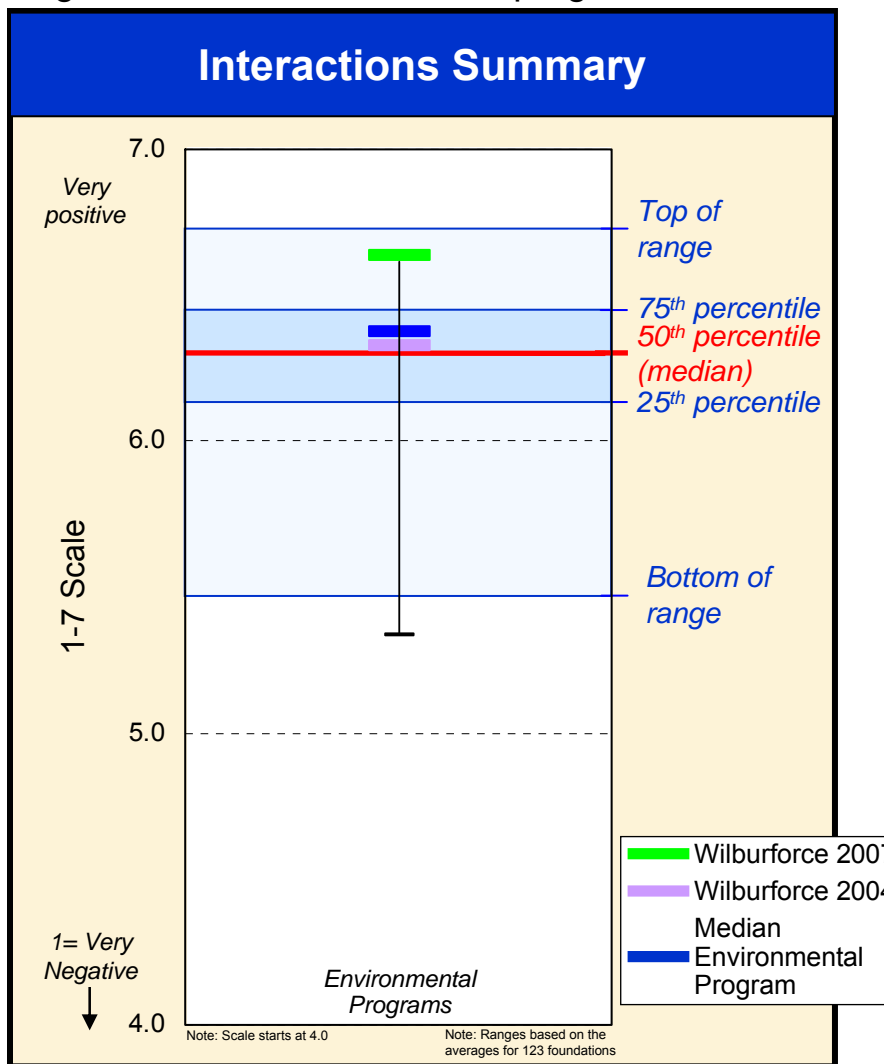
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# Grantee Interactions Summary

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 Wilburforce is rated:

- higher than ninety percent of surveyed foundations
- higher than all environmental programs



## Selected Grantee Comments

- ♦ “Wilburforce Foundation is the one funder I am totally at ease with and I'm comfortable sharing most anything with them.”
- ♦ “Our communications have been consistently very good. Prompt responses with the information requested. Also, open communication to discuss and resolve any problems that arise.”
- ♦ “Good, committed, and thoughtful staff. A transition of staff meant that we had to educate incoming program staff at a level of detail that had not hitherto been required, but theirs were intelligent questions. We trust that we provided intelligent answers.”
- ♦ “The BC/Alaska Program has been going through a transition and I have been quite pleased with the quality of the interactions and communication given the changes that have taken place.”
- ♦ “Wilburforce Foundation does a great job at keeping in contact with its grantees and potential grantees.”

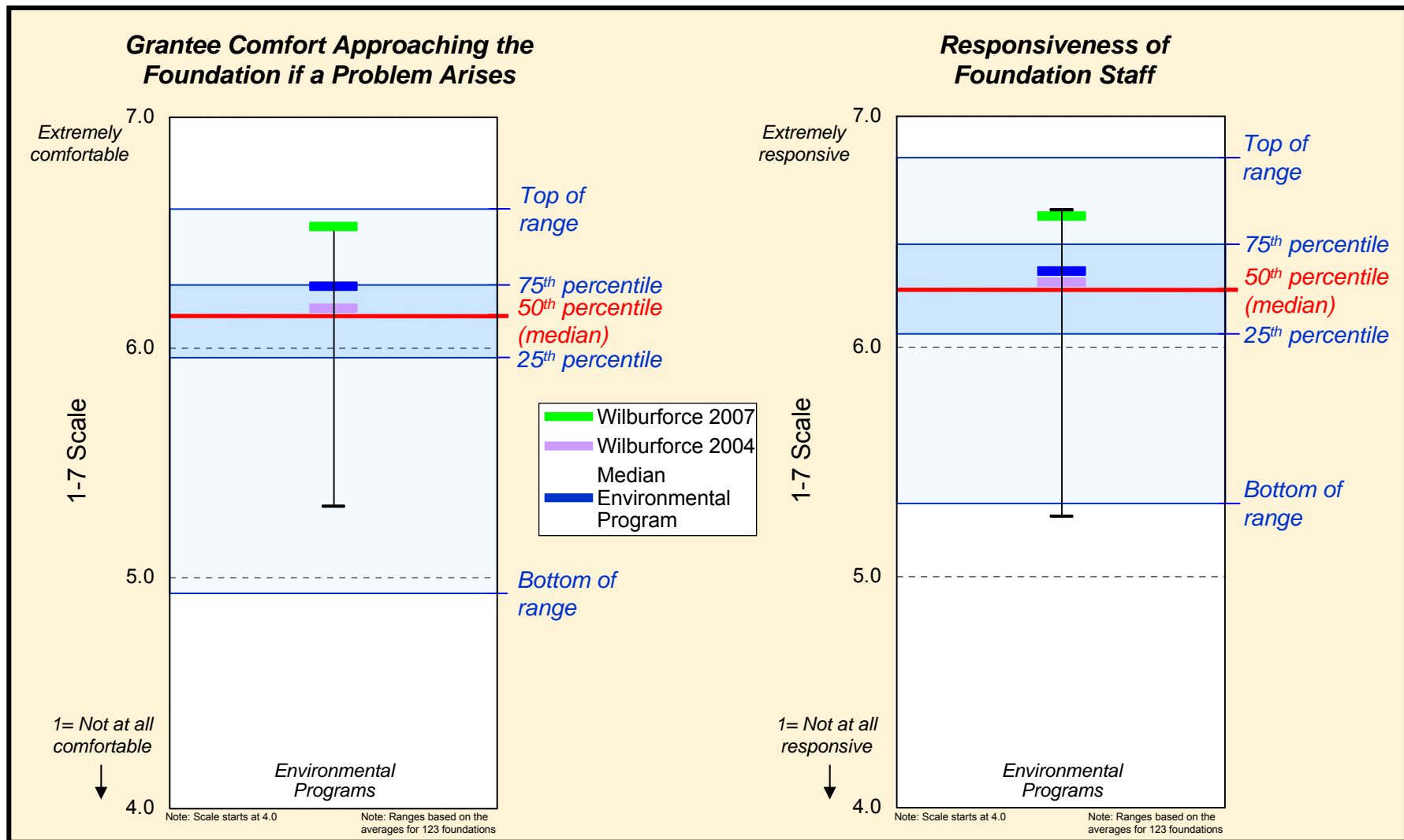
# Interactions Measures (1)

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

- higher than ninety percent of surveyed foundations
- higher than all environmental programs

On responsiveness of Foundation staff to grantees, Wilburforce is rated:

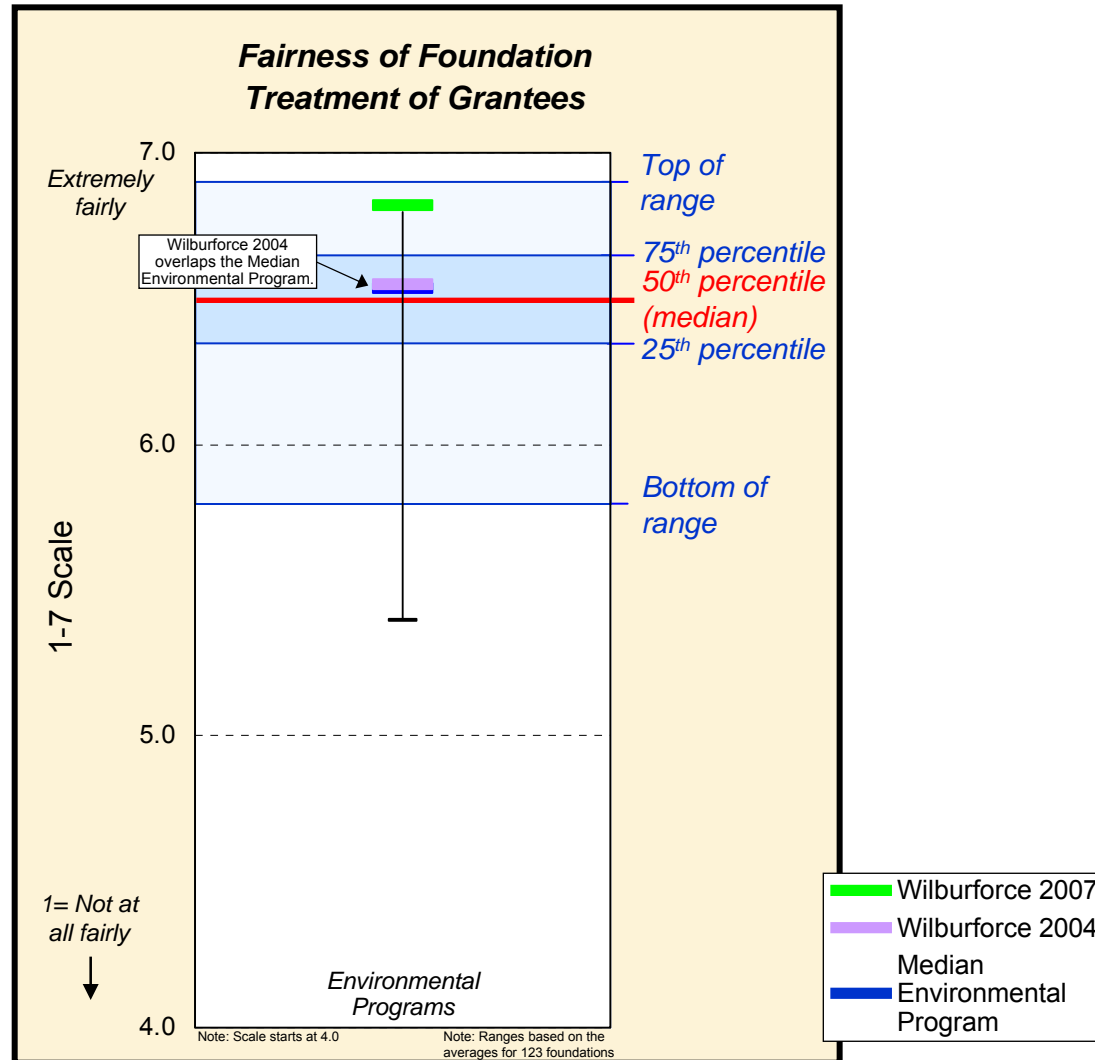
- higher than ninety percent of surveyed foundations
- above the median environmental program



# Interactions Measures (2)

On fairness of treatment of grantees, Wilburforce is rated:

- higher than ninety percent of surveyed foundations
- higher than all environmental programs

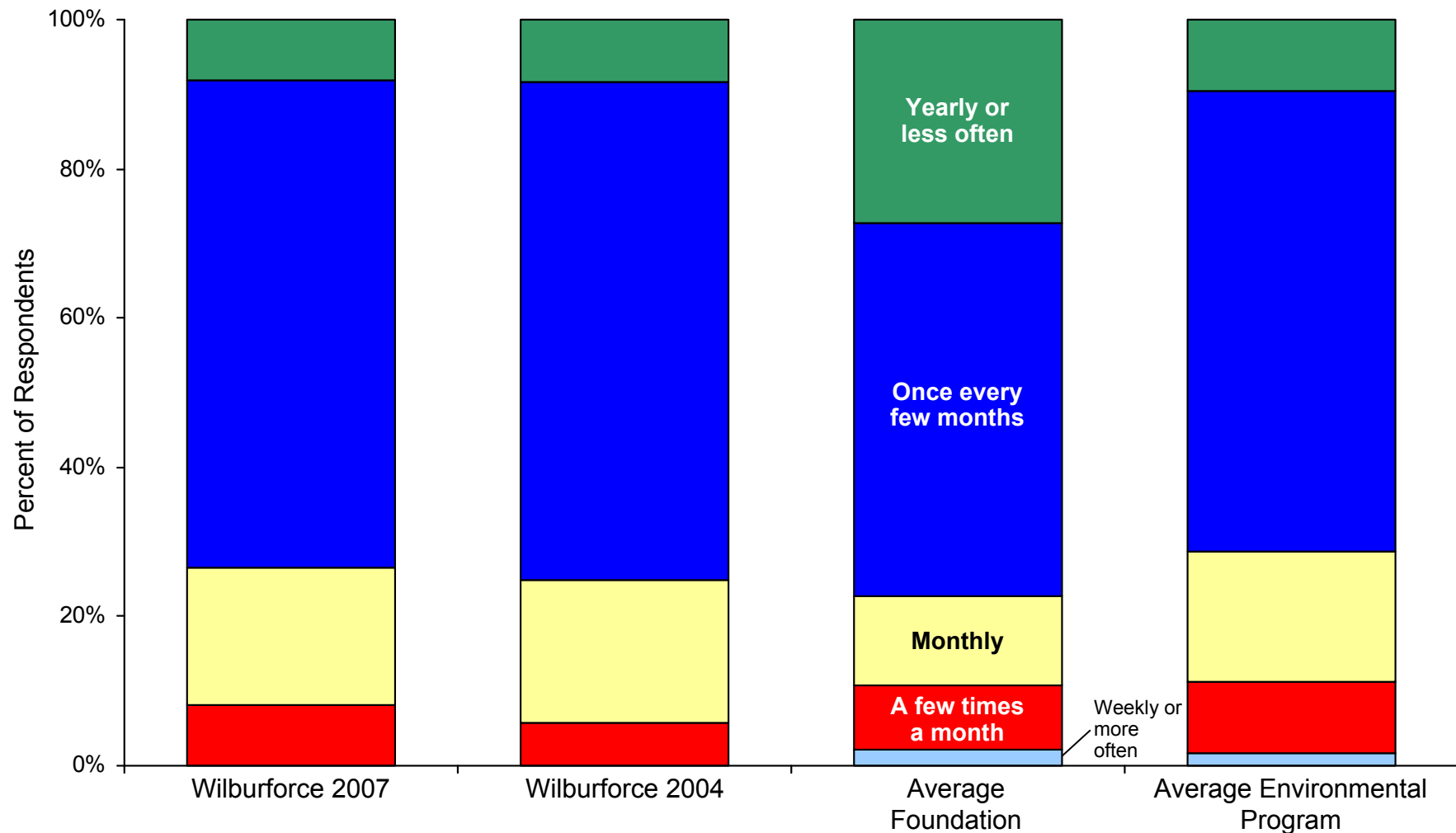


# Frequency of Interactions

The proportion of Wilburforce grantees that report interacting with their program officers once every few months or more frequently is:

- larger than that of the average foundation
- similar to that of the average environmental program

**Frequency of Grantee Contact with Program Officers During Grant**

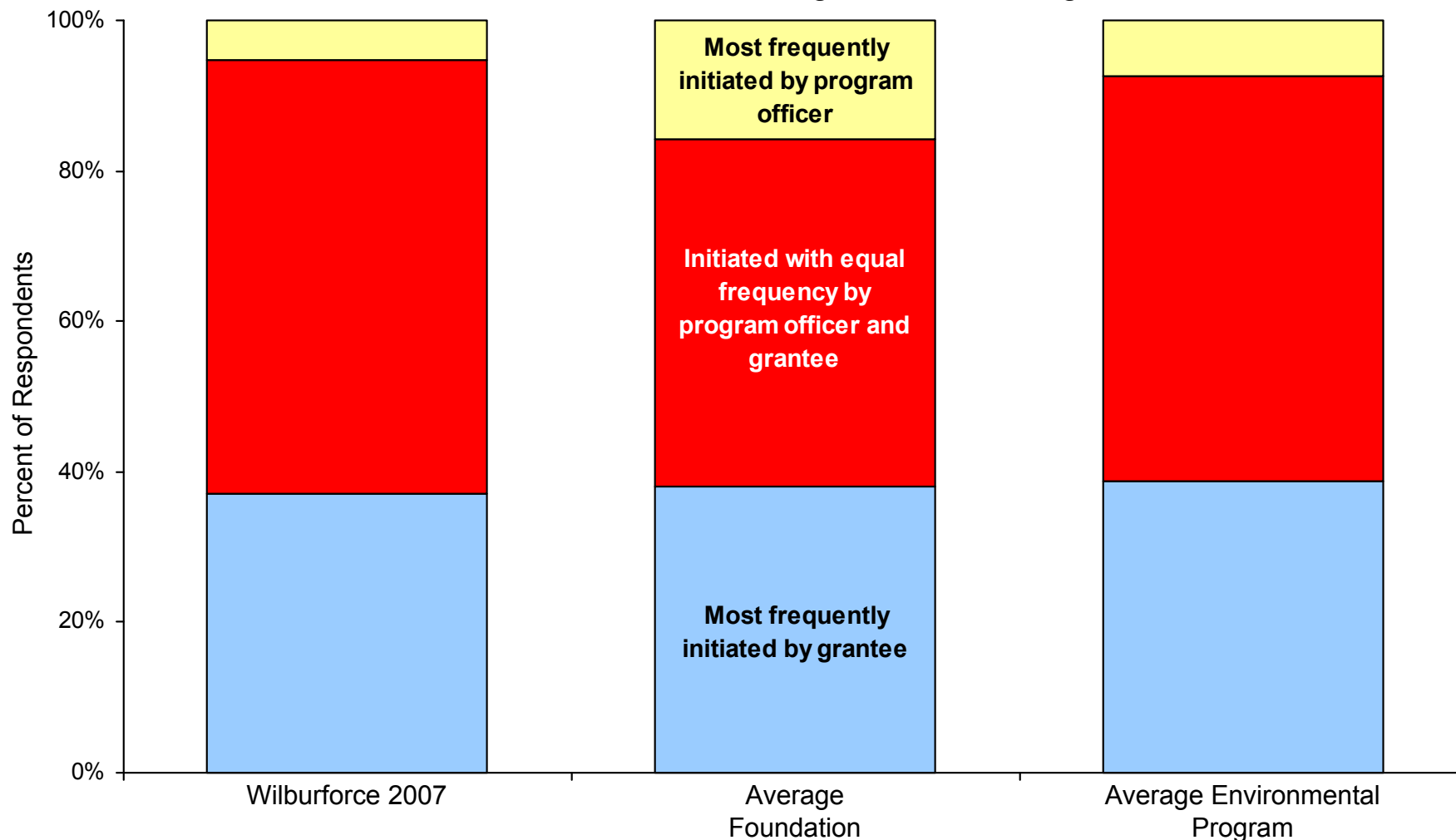


# Initiation of Interactions

The proportion of Wilburforce grantees that report that program officers and grantees initiate contact with equal frequency is:

- larger than that of the average foundation
- similar to that of the average environmental program

*Initiation of Grantee Contact with Program Officers During Grant*

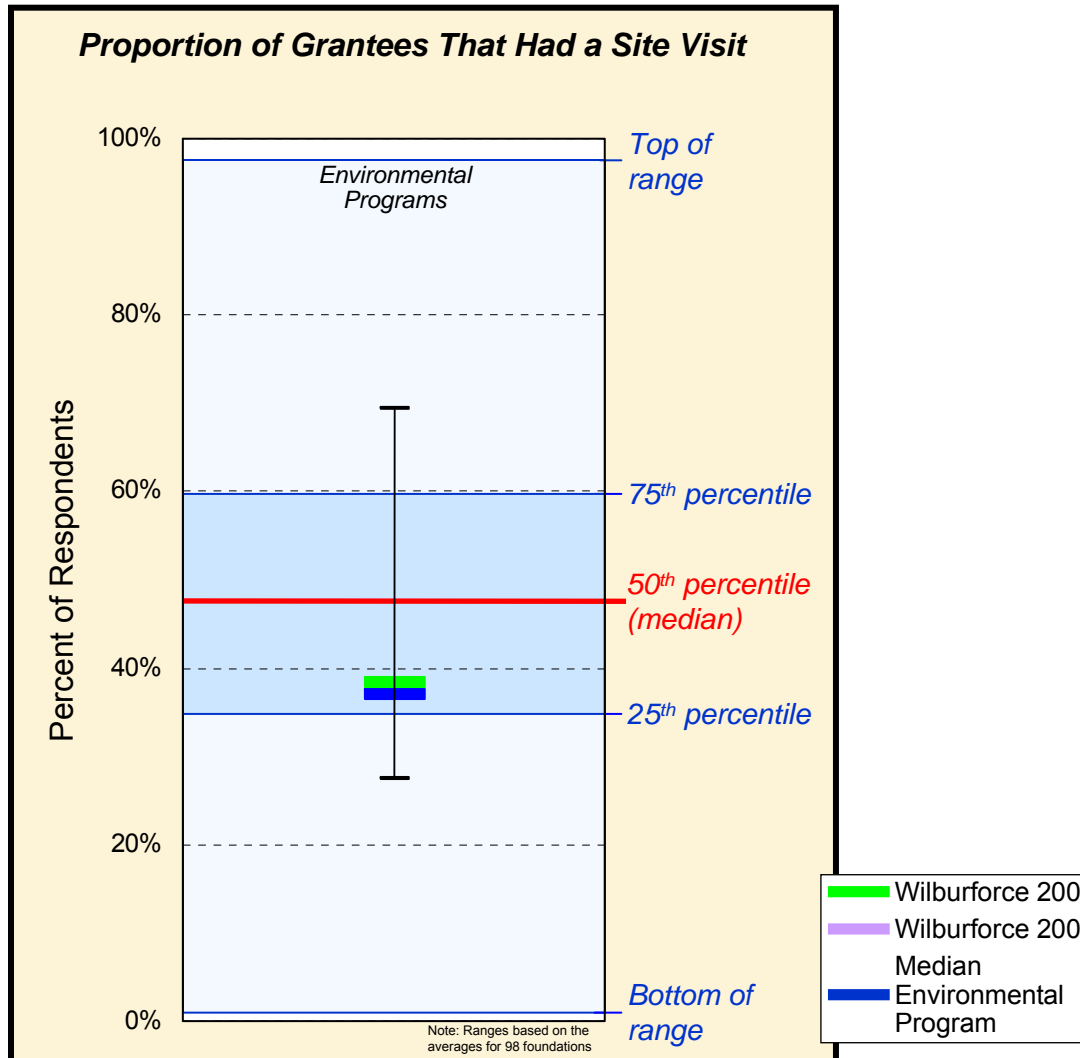


Note: This chart includes data about 98 foundations. Wilburforce 2004 data not available due to changes to the survey instrument.

# Proportion of Grantees That Had a Site Visit

The proportion of Wilburforce grantees receiving a site visit is:

- smaller than that of the median foundation
- similar to that of the median environmental program



Note: Chart created by aggregating data about site visits that occurred during the selection, reporting and evaluation processes, and during the course of the grant. Wilburforce 2004 data not available due to change to the survey instrument.

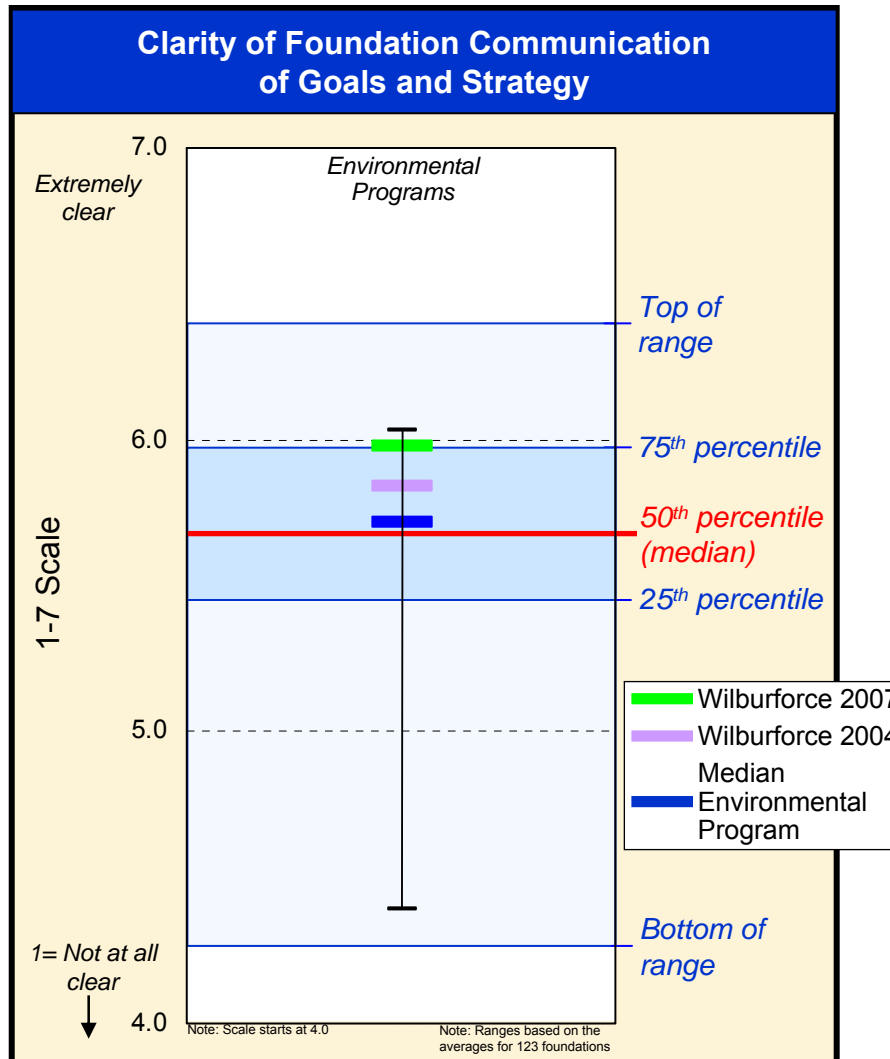
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# Communication of Goals and Strategy

On clarity of the Foundation’s communication of its goals and strategy, Wilburforce is rated:

- above the median foundation
- above the median environmental program



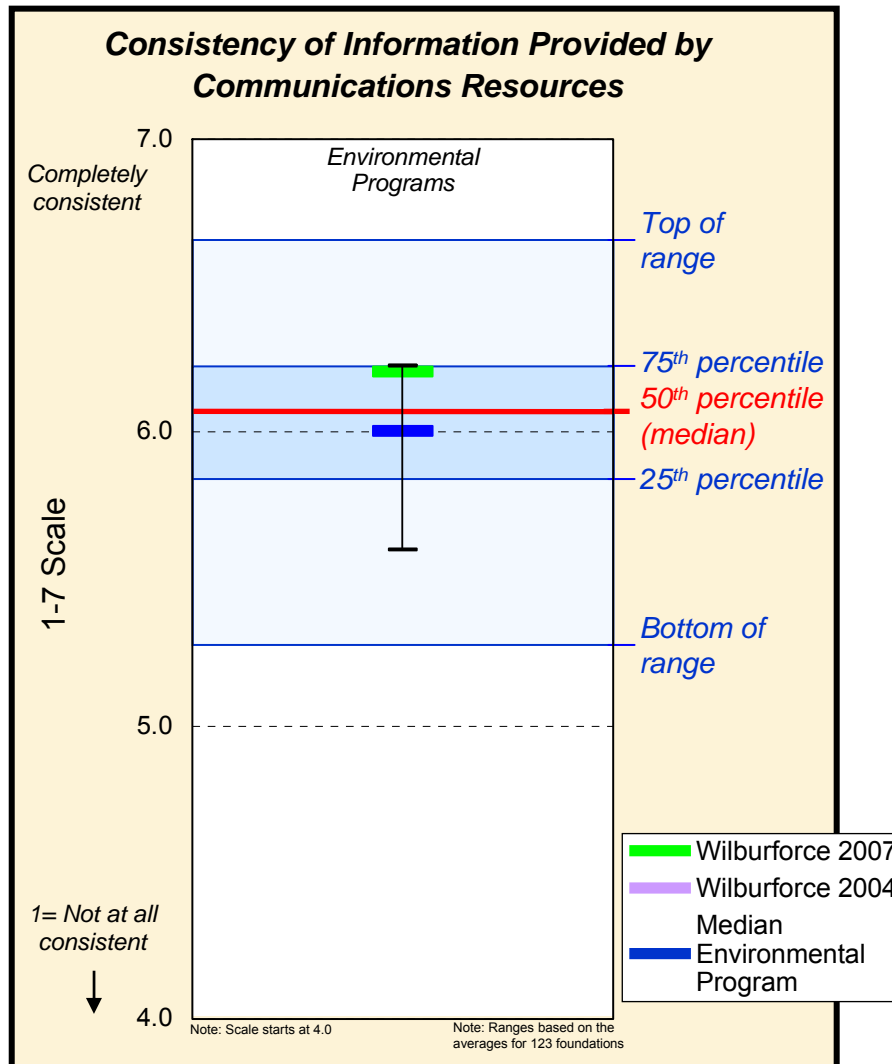
## Selected Grantee Comments

- ♦ “Wilburforce is definitely our best funder to deal with, and seems to me to have the clearest understanding of what they want to accomplish.”
- ♦ “Wilburforce is easily the most open and personalized foundation I have worked with. There is consistent transparency in communications and honest interactions on areas of work and strategies employed for the proposed program. I have found the Foundation to be professional and accessible.”
- ♦ “The Bozeman Y2Y office seems well-informed and in touch with the Seattle office, making it essentially unnecessary for us to contact the Seattle office. We’ve never been misinformed by either office as to the other office or procedures, etc.”

# Consistency of Communications

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

- above the median foundation
- above the median environmental program

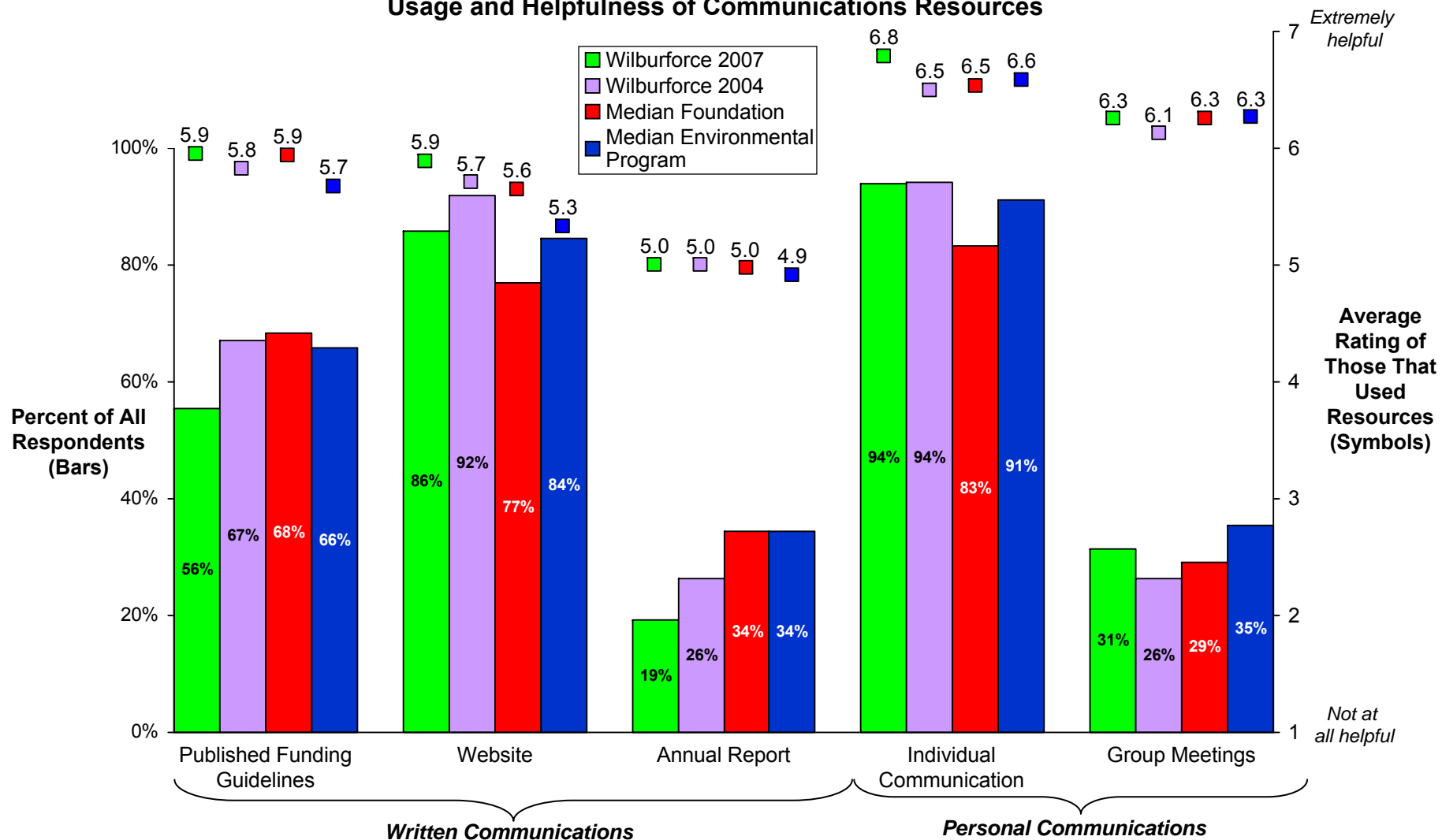


*Survey-Wide Analysis Fact: Consistency of Communications, both personal and written, is the best predictor of grantee ratings of a foundation's clarity of communication of its goals and strategy. Other predictors are 1) Quality of Interactions with Foundation Staff: fairness, responsiveness, approachability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

# Communications Resources (1)

Compared to the median foundation, a larger than typical proportion of Wilburforce grantees report using the Foundation's website and individual communications with Foundation staff to learn about the Foundation. The Foundation's communications resources are rated similarly to or above the median on their helpfulness to grantees.

Usage and Helpfulness of Communications Resources



Note: This chart includes data about 123 foundations.

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# Non-Monetary Assistance Summary

On this summary that includes whether grantees received individual assistance activities from the Foundation or third parties and ratings of helpfulness of assistance activities Wilburforce is:

- above the median foundation
- above the median environmental program

## Non-Monetary Assistance Activities Included in Summary

### MANAGEMENT ASSISTANCE

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

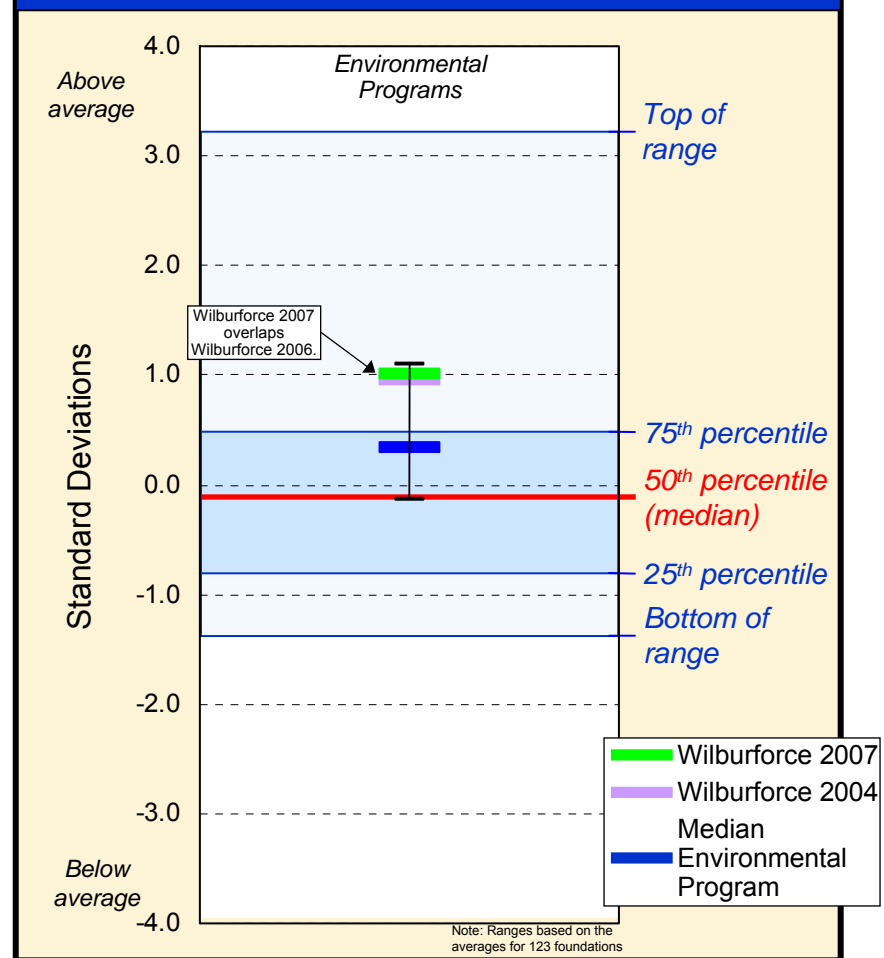
### FIELD-RELATED ASSISTANCE

- 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

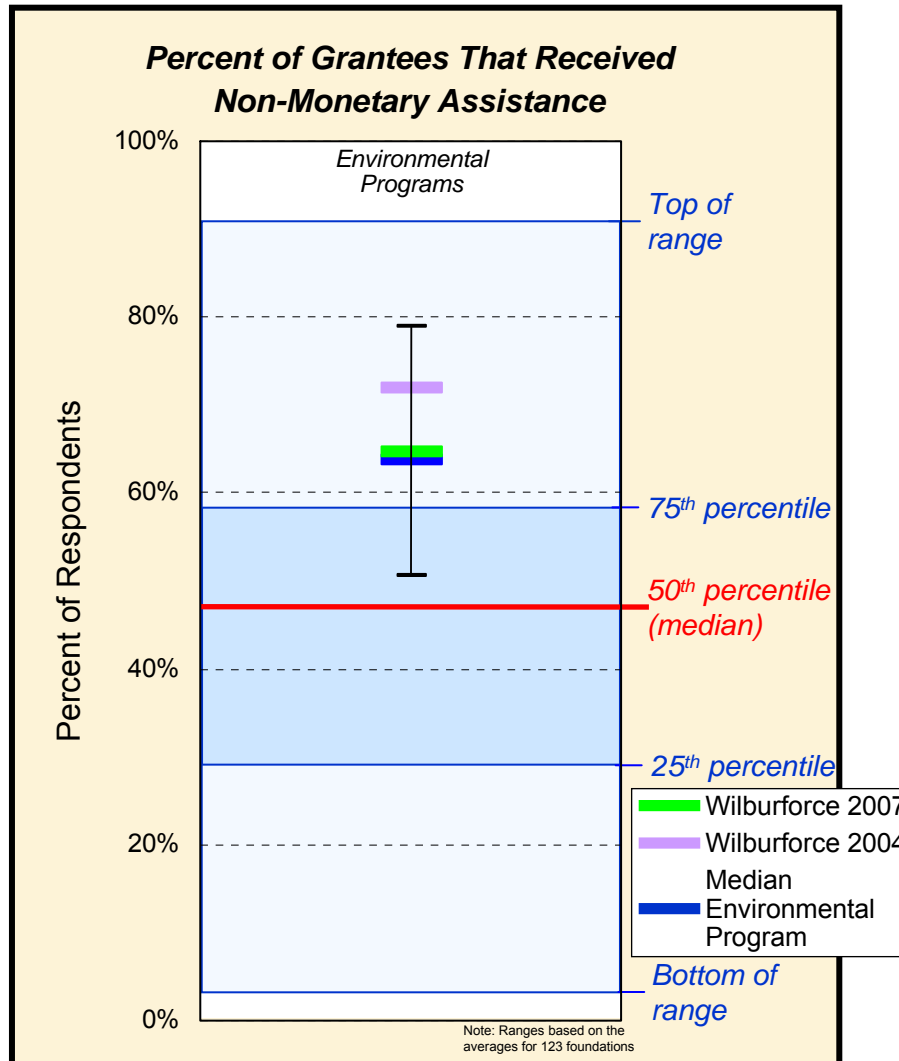
## Non-Monetary Assistance Summary



# Non-Monetary Assistance

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

- larger than that of the median foundation
- similar to that of the median environmental program



## Selected Grantee Comments

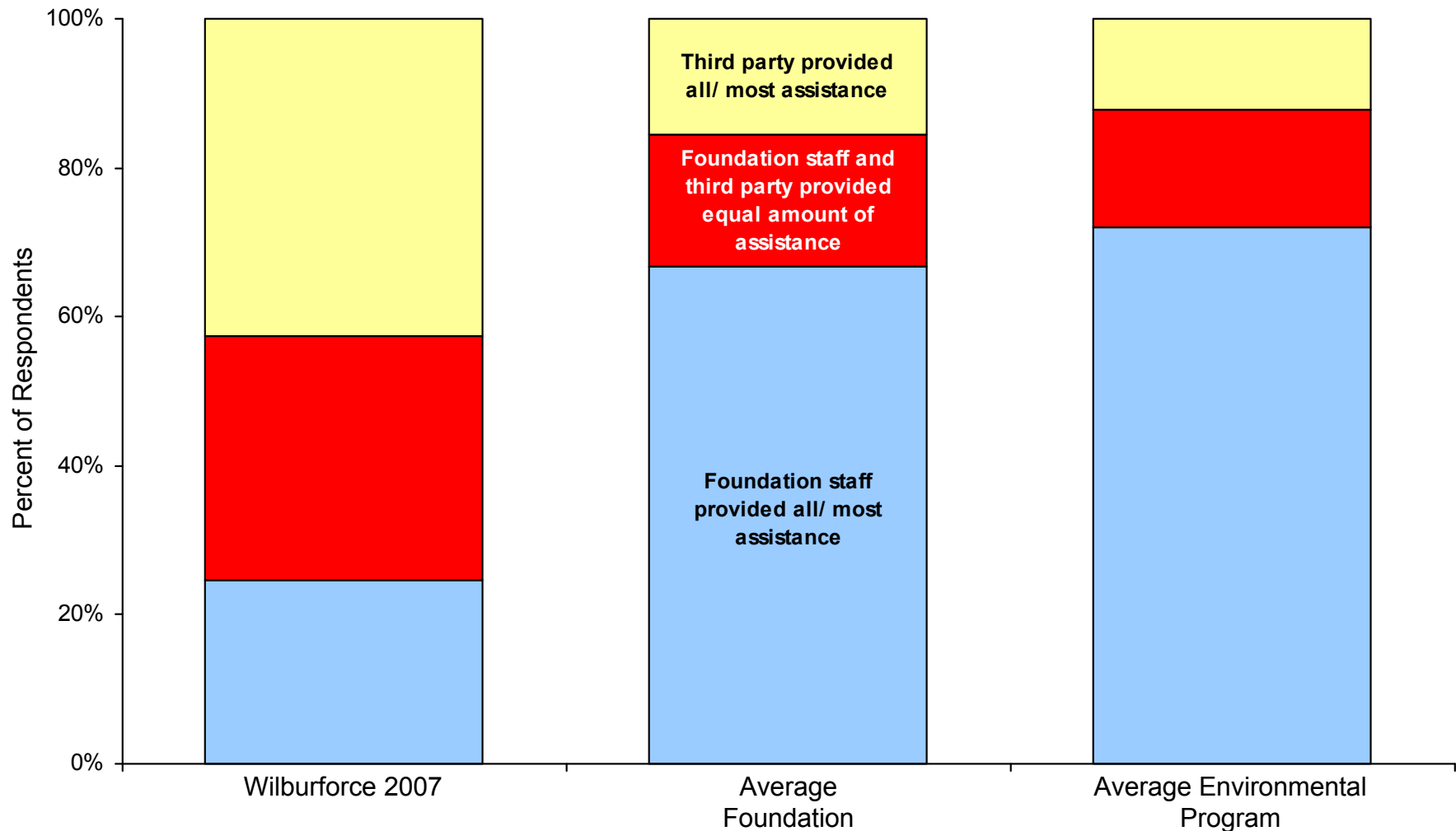
- ♦ *“The Foundation staff has been a resource and been willing to participate in trainings and events in coordination with our staff and brought incredible value to those gatherings ... Through the resources provided by TREC, our staff has grown professionally and we have grown stronger as a team thanks to this individual training and the ideas and enthusiasm brought back and shared with all.”*
- ♦ *“Advice and counsel from the staff has been wonderful. They have experience and share it.”*
- ♦ *“Through the full suite of services provided by TREC, we have gone through financial and fund raising training, re-aligned the organization around a strategic plan, expanded the thinking of our board, and made our organization more effective and sustainable. None of this would have been possible without Wilburforce Foundation support!”*
- ♦ *“Wilburforce is the one Foundation that really appreciates the non-campaign needs of our organization and staff. The assistance provided is profoundly important.”*

# Who Provided Non-Monetary Assistance

The proportion of Wilburforce grantees that report that a third party provided all or most of the assistance they received is:

- larger than that of the average foundation
- larger than that of the average environmental program

**Who Provided Non-Monetary Assistance**

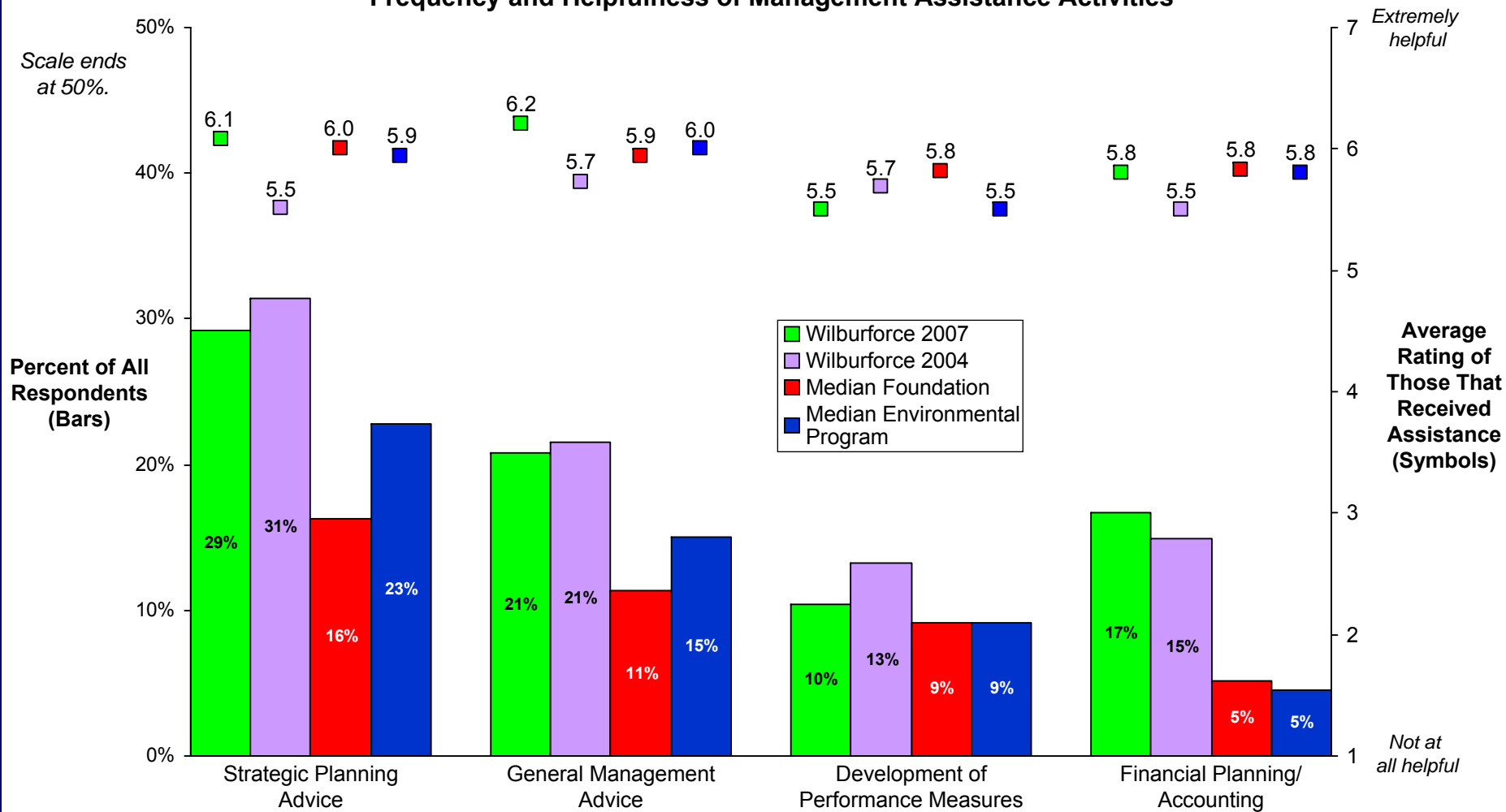


Note: This chart includes data about 123 foundations. Wilburforce 2004 data not available due to changes to the survey instrument.

# Management Assistance Activities & Helpfulness

A larger proportion of Wilburforce grantees report receiving management assistance than grantees of the median foundation. The helpfulness of different management assistance activities is seen to vary relative to the ratings received by the median foundation.

Frequency and Helpfulness of Management Assistance Activities

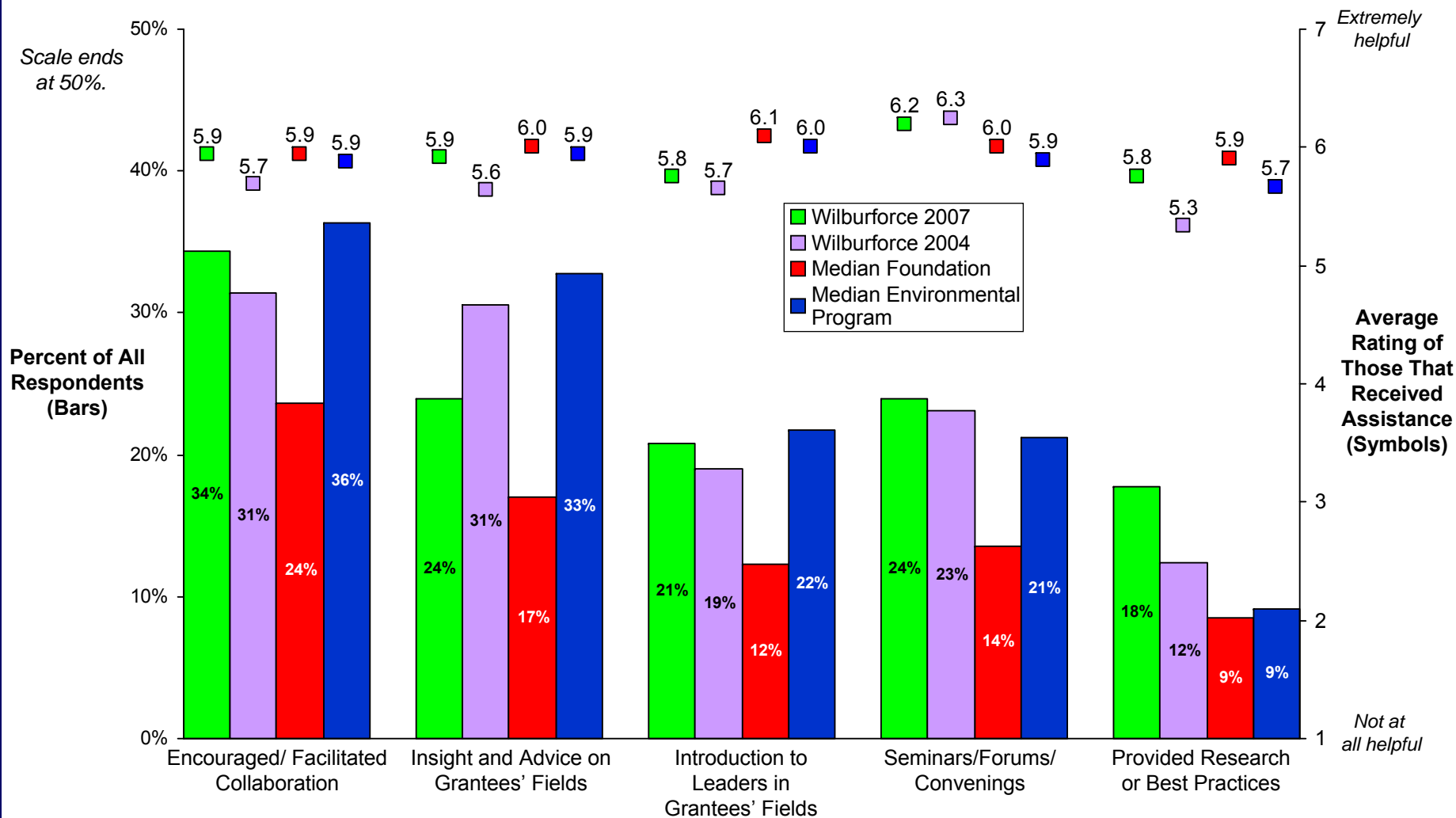


Note: This chart includes data about 123 foundations.

# Field-Related Assistance Activities & Helpfulness

A larger than typical proportion of Wilburforce grantees are provided field-related assistance. The helpfulness of these activities is seen to vary relative to the activities provided by the median foundation.

Frequency and Helpfulness of Field-Related Assistance Activities



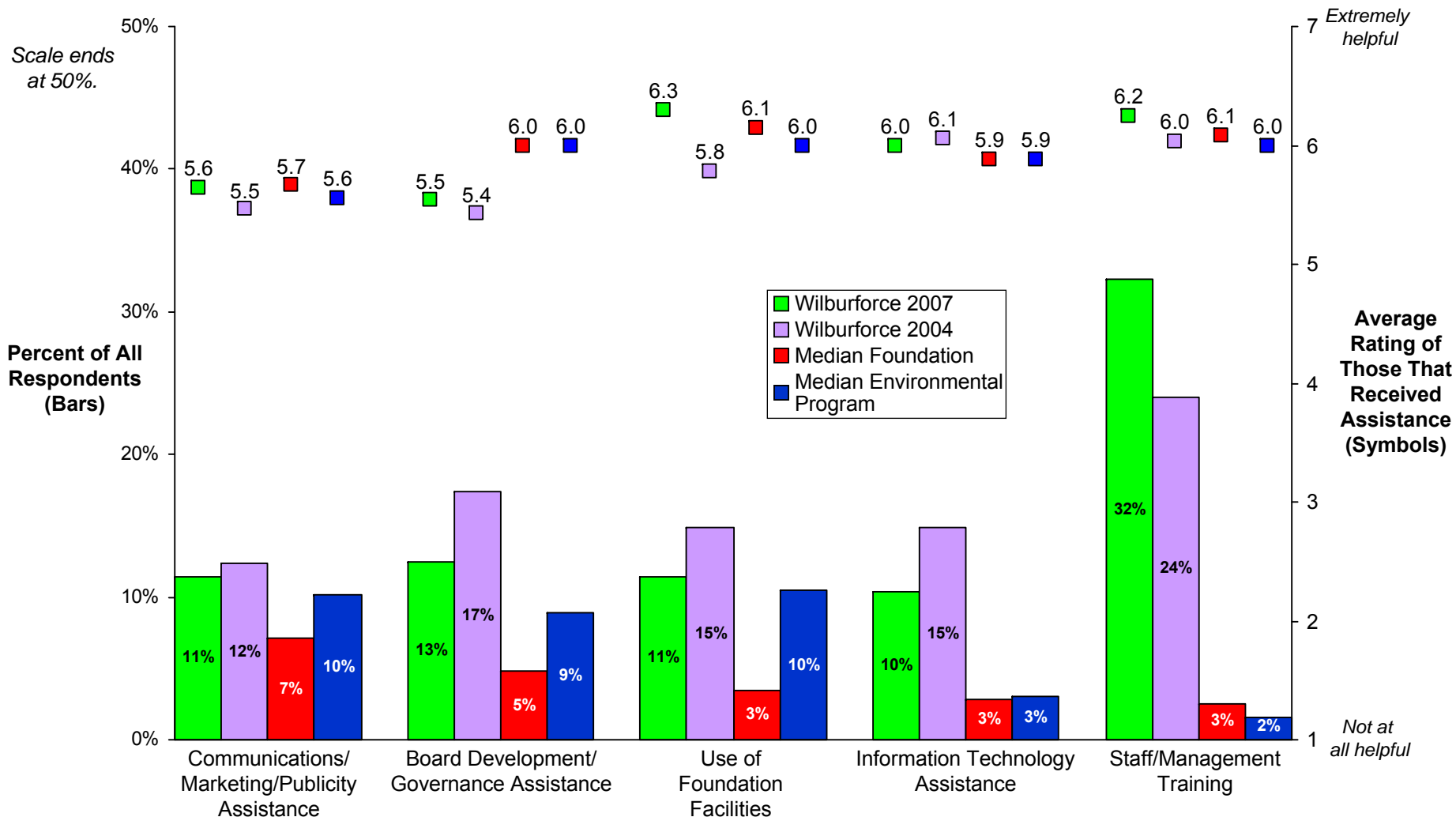
VII. Assistance Beyond the Grant Check

Note: This chart includes data about 123 foundations.

# Other Support Activities & Helpfulness

Wilburforce provides a larger than typical proportion of grantees with these other types of assistance. The helpfulness of these other support activities is seen to vary relative to the activities provided by the median foundation.

Frequency and Helpfulness of Other Assistance Activities

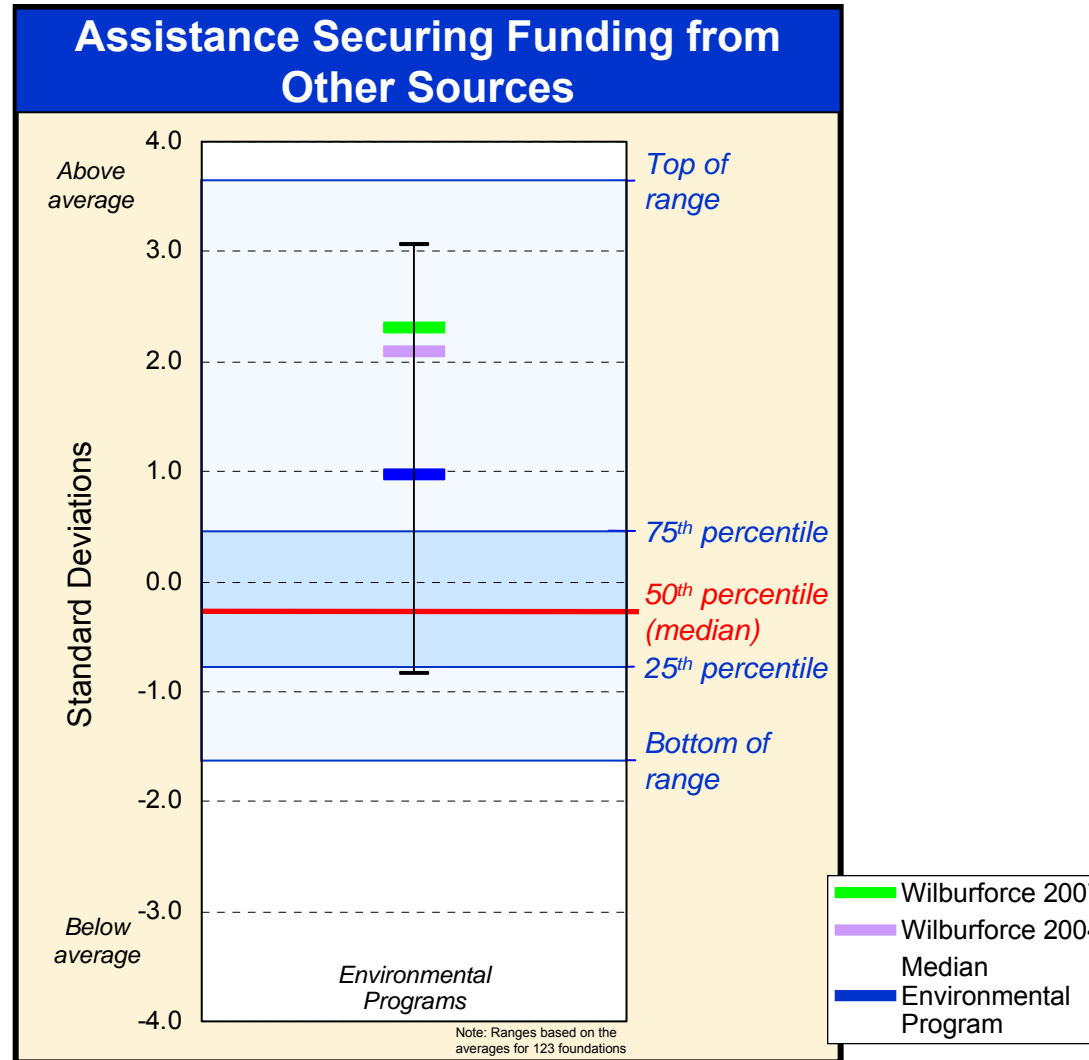


Note: This chart includes data about 123 foundations.

# Assistance Securing Funding from Other Sources

On this summary that includes the frequency of active foundation assistance in obtaining additional funding from other sources and the impact of those efforts Wilburforce is:

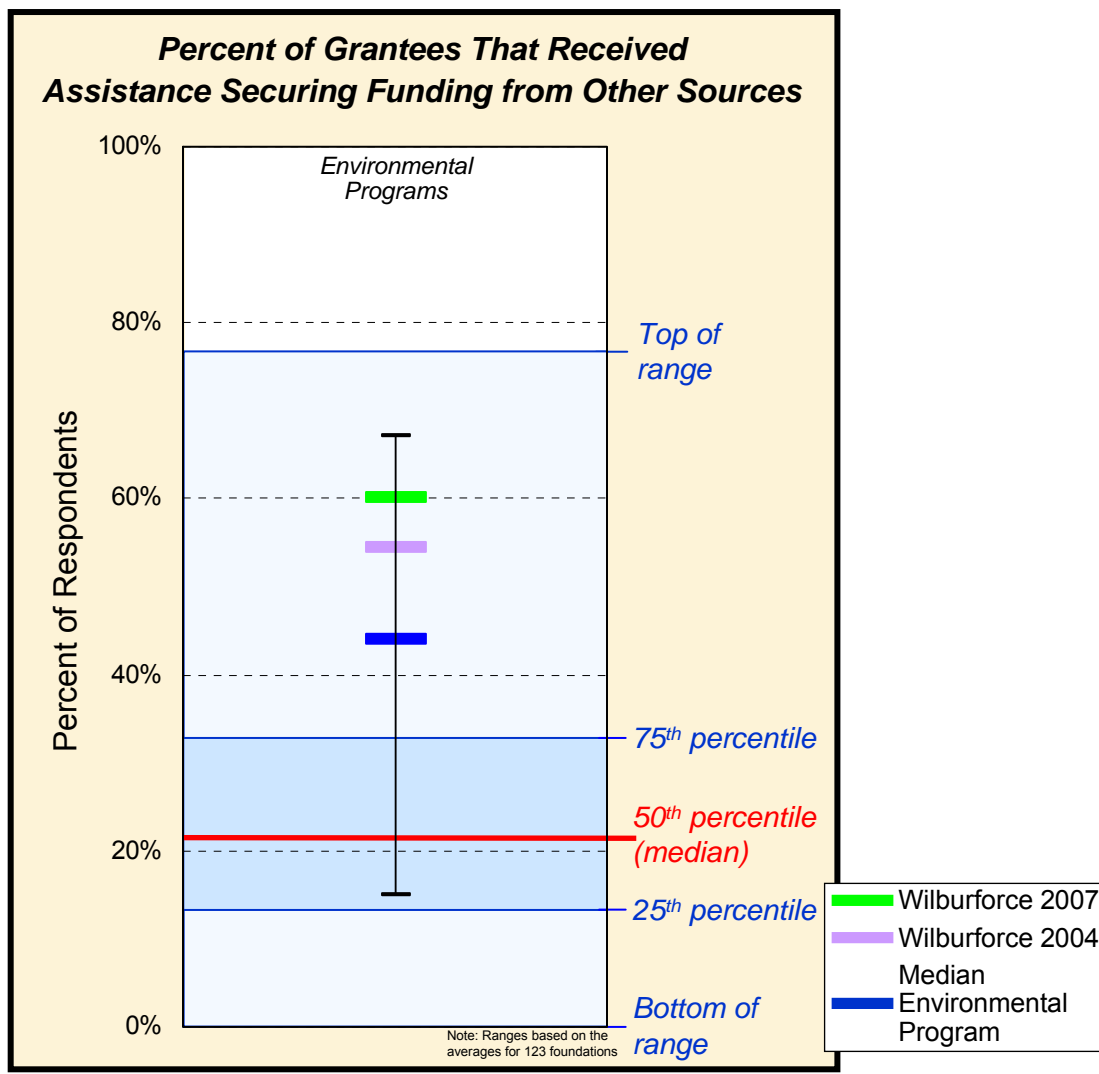
- higher than ninety percent of surveyed foundations
- above the median environmental program



# Proportion of Grantees Obtaining Assistance Securing Funding

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

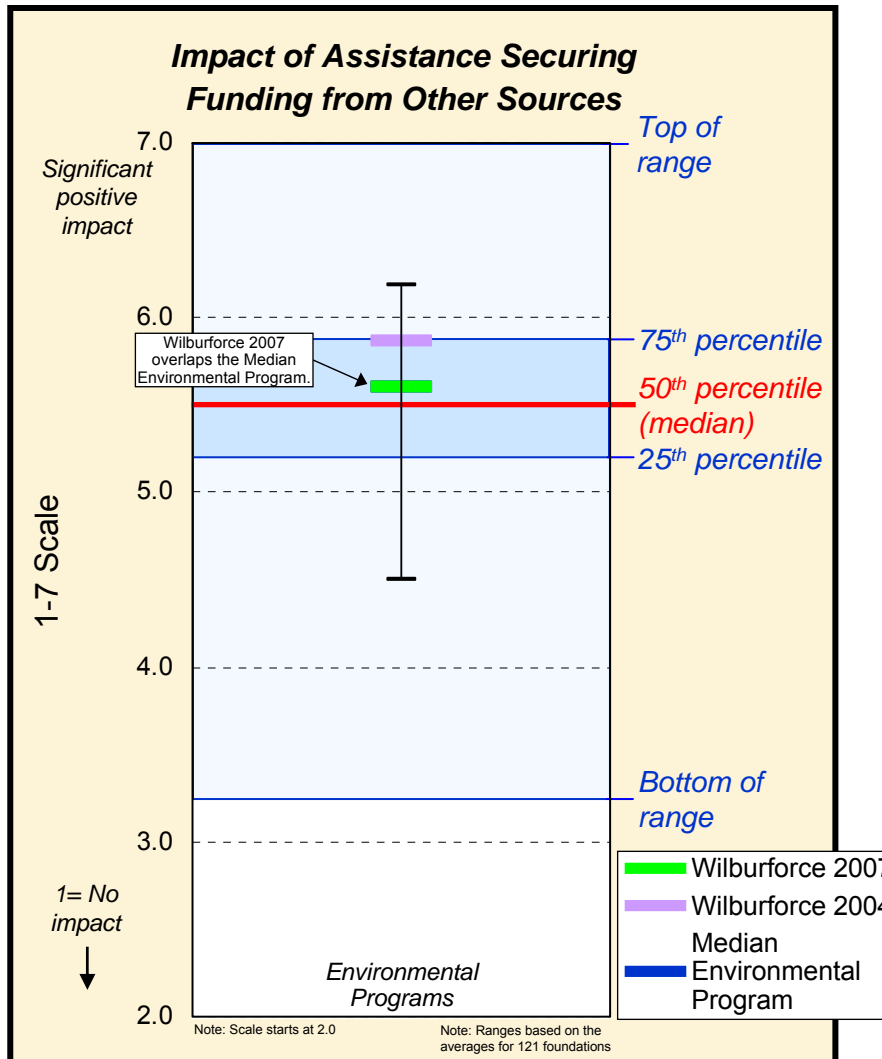
- larger than that of ninety percent of surveyed foundations
- larger than that of the median environmental program



# Impact of Assistance Securing Other Funding

On impact of the Foundation's assistance in securing funding from other sources, Wilburforce is rated:

- similarly to the median foundation
- similarly to the median environmental program



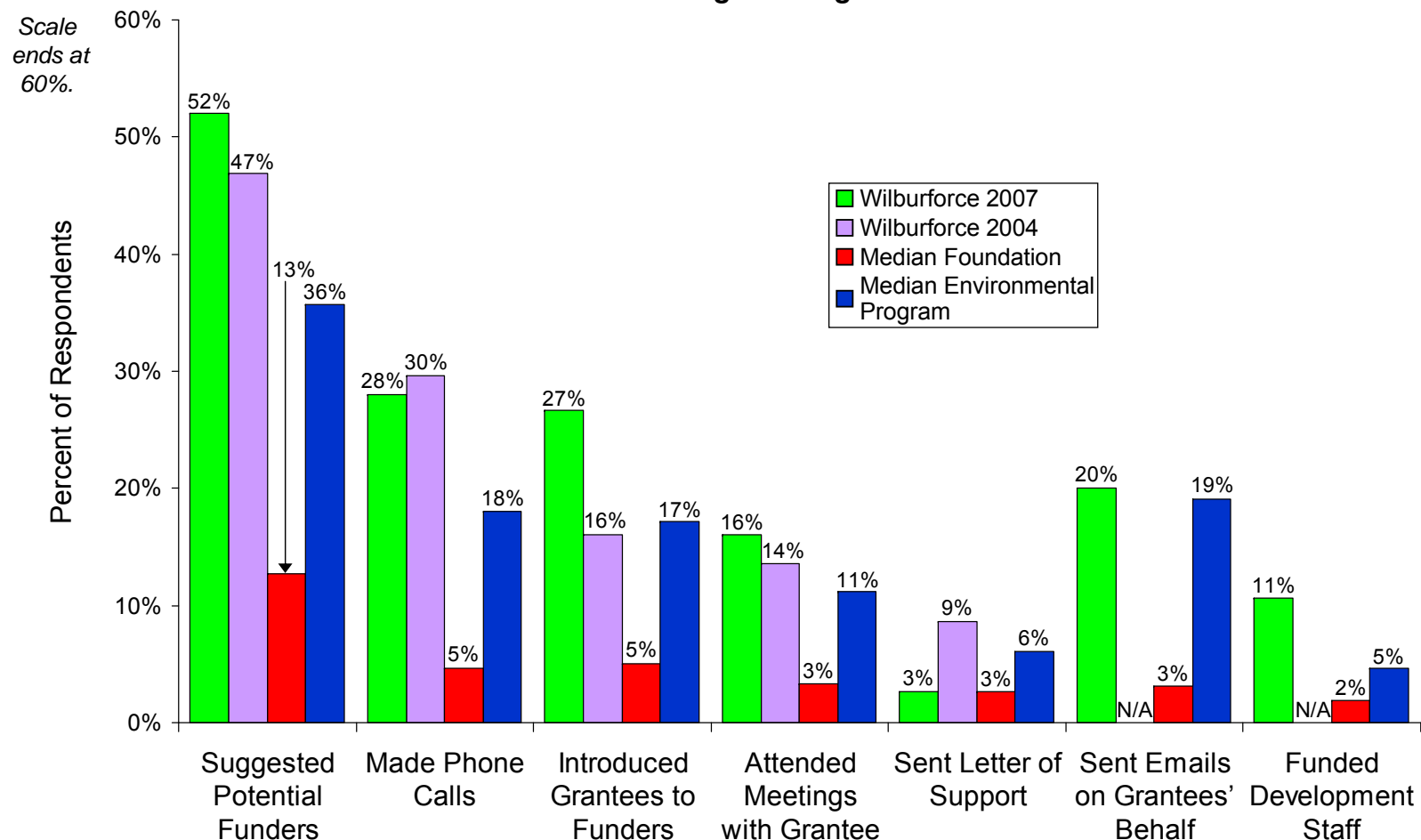
## Selected Grantee Comments

- ♦ “Wilburforce has recognized the need for effective program work to be backed by effective internal systems and fundraising capacity, and has generously invested in these capacities in addition to the direct program funding. This has allowed us to build our capacity over time and diversify our funding resources.”
- ♦ “By being one of the first foundations to provide funding, Wilburforce helped establish the project and give it credibility with other funders (that have come thereafter). Additionally, [our program officer] has been a tremendous asset in identifying and encouraging other funders and also suggesting and encouraging scientists to participate in the project.”
- ♦ “Wilburforce’s work to increase awareness of conservation and Y2Y among Alberta funders and philanthropists has been very commendable. Whether it results in anything substantial has yet to be determined, but Wilburforce has certainly done all that could be expected of it.”
- ♦ “[Wilburforce as had a] very positive impact by seeding an upstart program and introducing us to potential funders.”

# Frequency of Assistance Securing Funding

Wilburforce grantees more frequently report receiving assistance securing funding from other sources from the Foundation than typical.

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

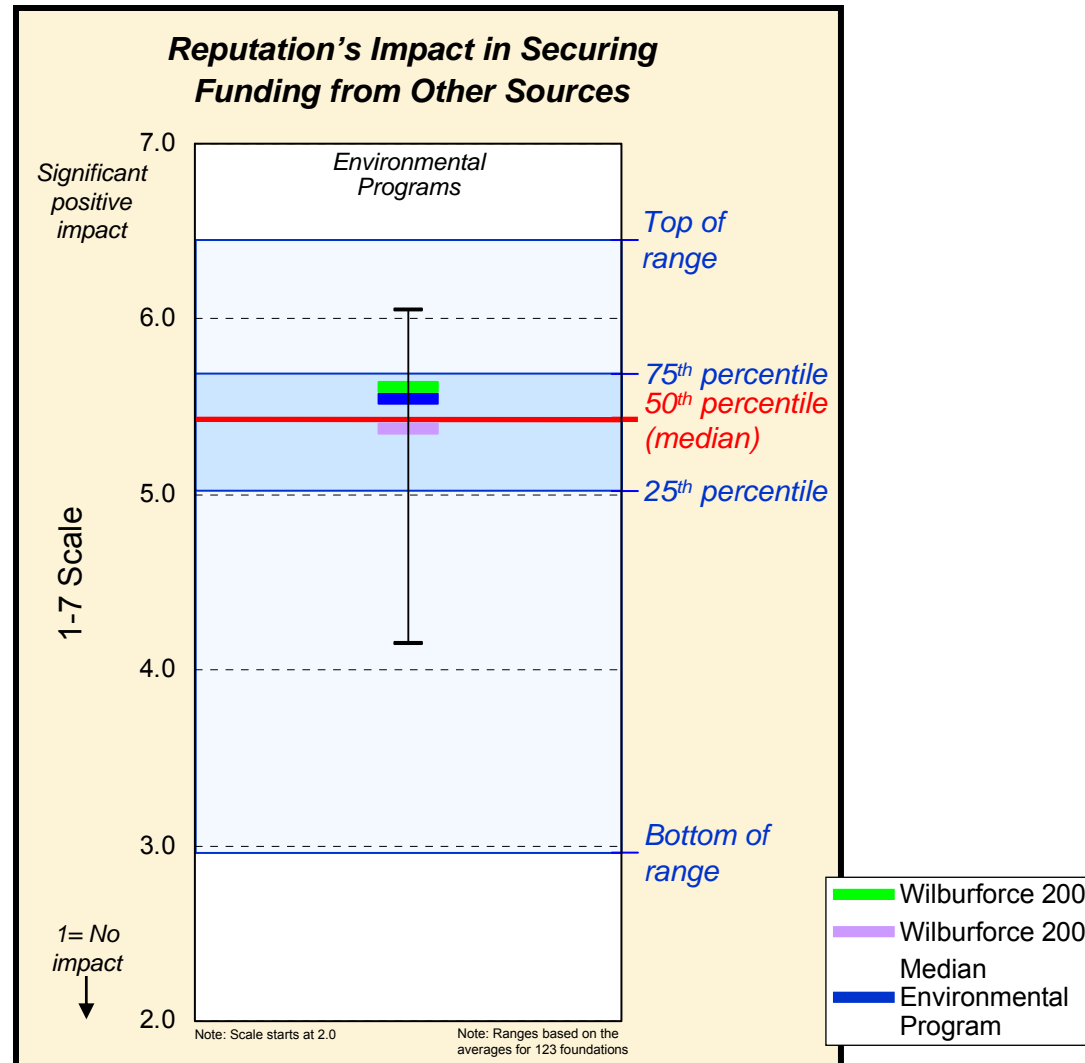


Note: This chart includes data about 123 foundations, with the exception of "sent emails on grantees' behalf" which includes data about 74 foundations, and "funded development staff" which includes data about 98 foundations. Wilburforce 2004 data not available for "sent emails on grantees' behalf" and "funded development staff" due to changes to the survey instrument.

# Impact of Reputation

On impact of the Foundation's reputation on grantees' ability to secure funding from other sources, Wilburforce is rated:

- above the median foundation
- similarly to the median environmental program



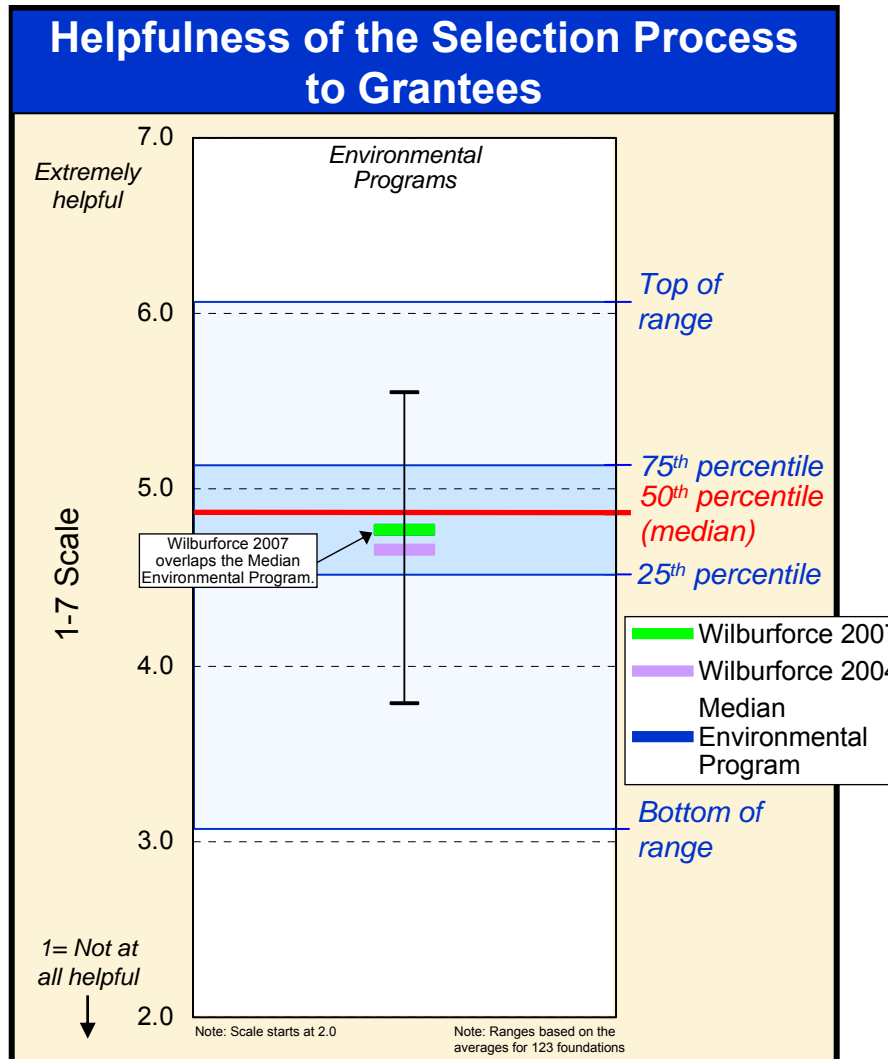
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# Helpfulness of Selection Process

On helpfulness of the Foundation’s selection process in strengthening the grantee, Wilburforce is rated:

- similarly to the median foundation
- similarly to the median environmental program



## Selected Grantee Comments

- ♦ “The Foundation has linked its application and reporting process – this works well – it makes the process clearer and easier. We really appreciate the process by which longer-term grantees like ourselves are invited to submit a proposal well in advance of the deadline. We are also given an opportunity to update Foundation staff about our activities and discuss our proposal. We really appreciate the fact that we are given email notification when our grant is successful before we receive the notification letter – this relieves stress and helps us plan.”
- ♦ “We find the Wilburforce Foundation to be professional, fair, and supportive. Writing proposals and reports for the Foundation forces us to crystallize and clarify our thinking, and it’s an important, if demanding exercise.”
- ♦ “The staff of the Foundation made the application process clear and helped us create funding proposals that met our needs and their objectives in funding priorities ... Writing a proposal that clearly shows a critical need and shows a campaign to satisfy that need can be extremely time consuming for a small organization. So far the Wilburforce Foundation has not placed such an onerous task on organizations in [this state].”

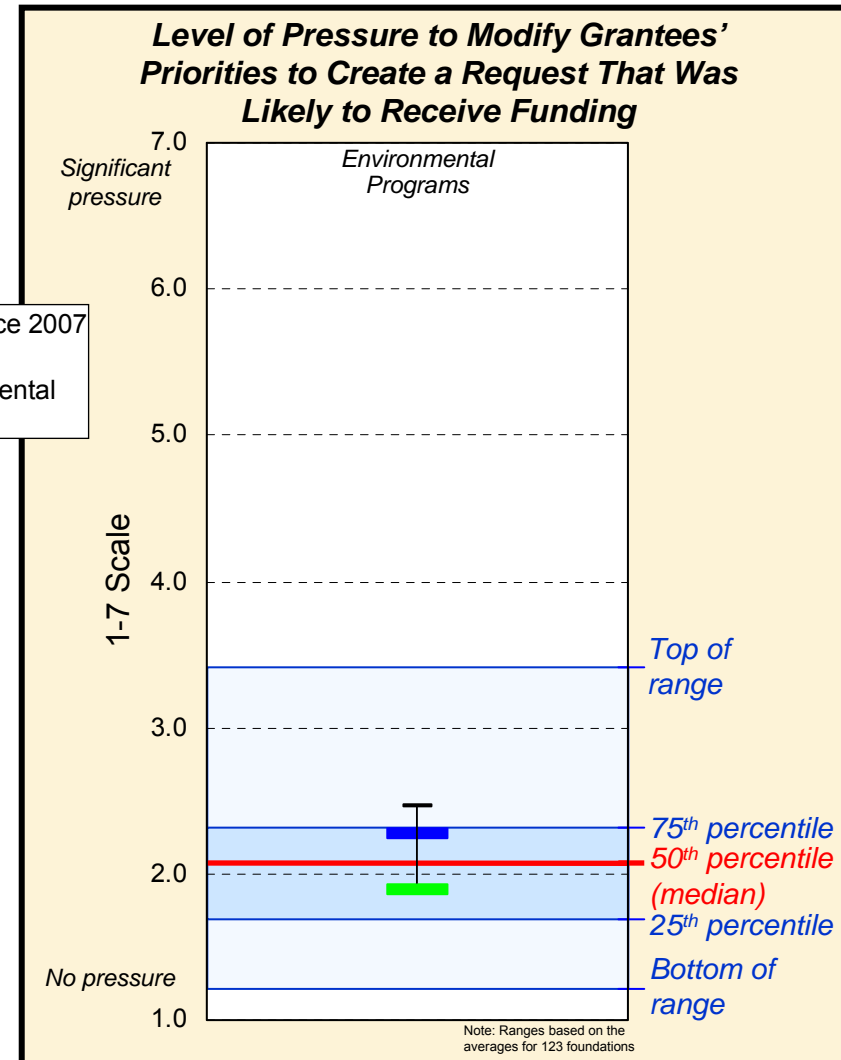
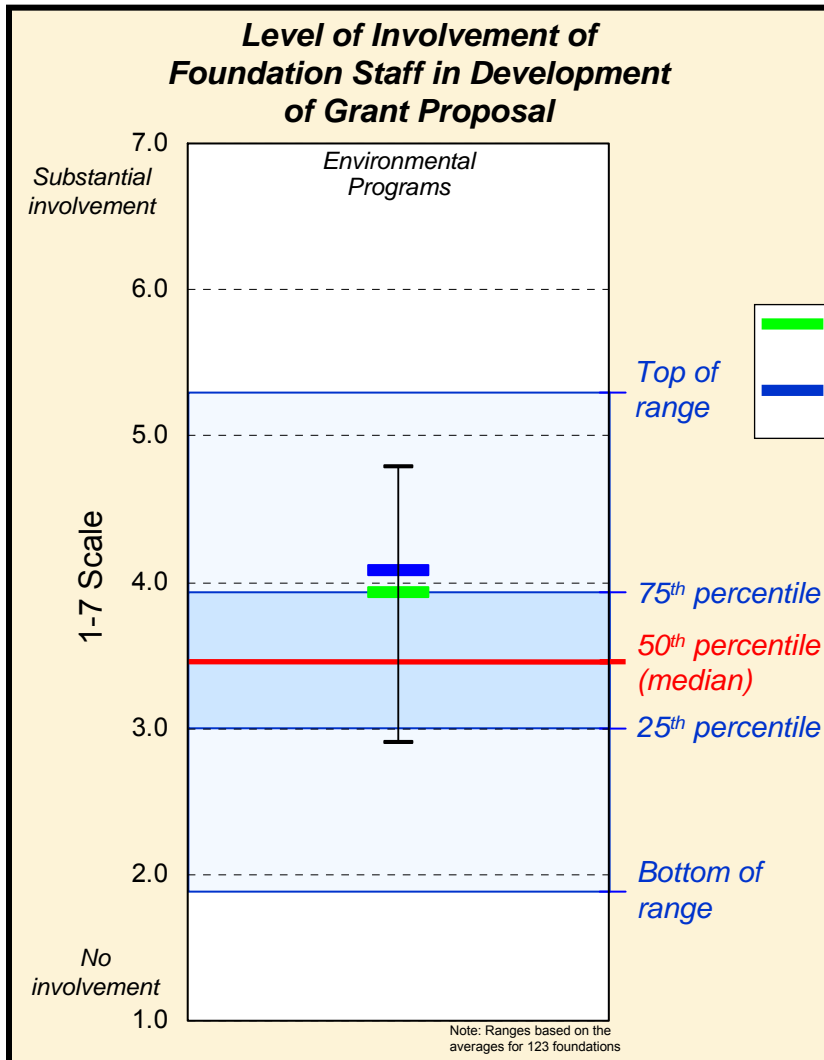
# Foundation Involvement and Pressure in Selection Process

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

- above the median foundation
- similarly to the median environmental program

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

- similarly to the median foundation
- lower than all environmental programs

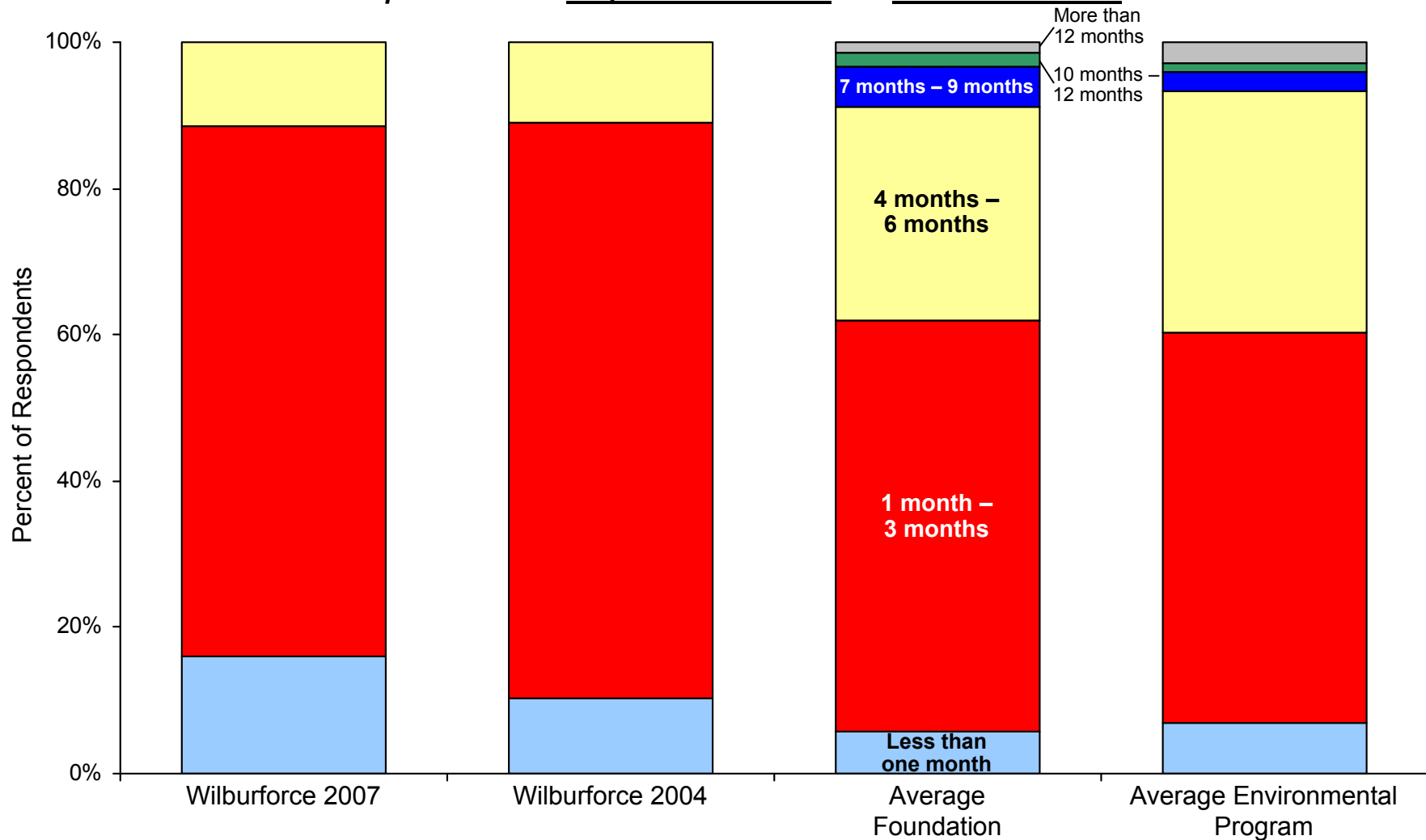


# Time Between Submission and Clear Commitment

The proportion of Wilburforce grantees that report that four months or more elapsed between submission of proposal and clear commitment of funding is:

- smaller than that of the average foundation
- smaller than that of the average environmental program

***Time Elapsed Between Proposal Submission and Clear Commitment***



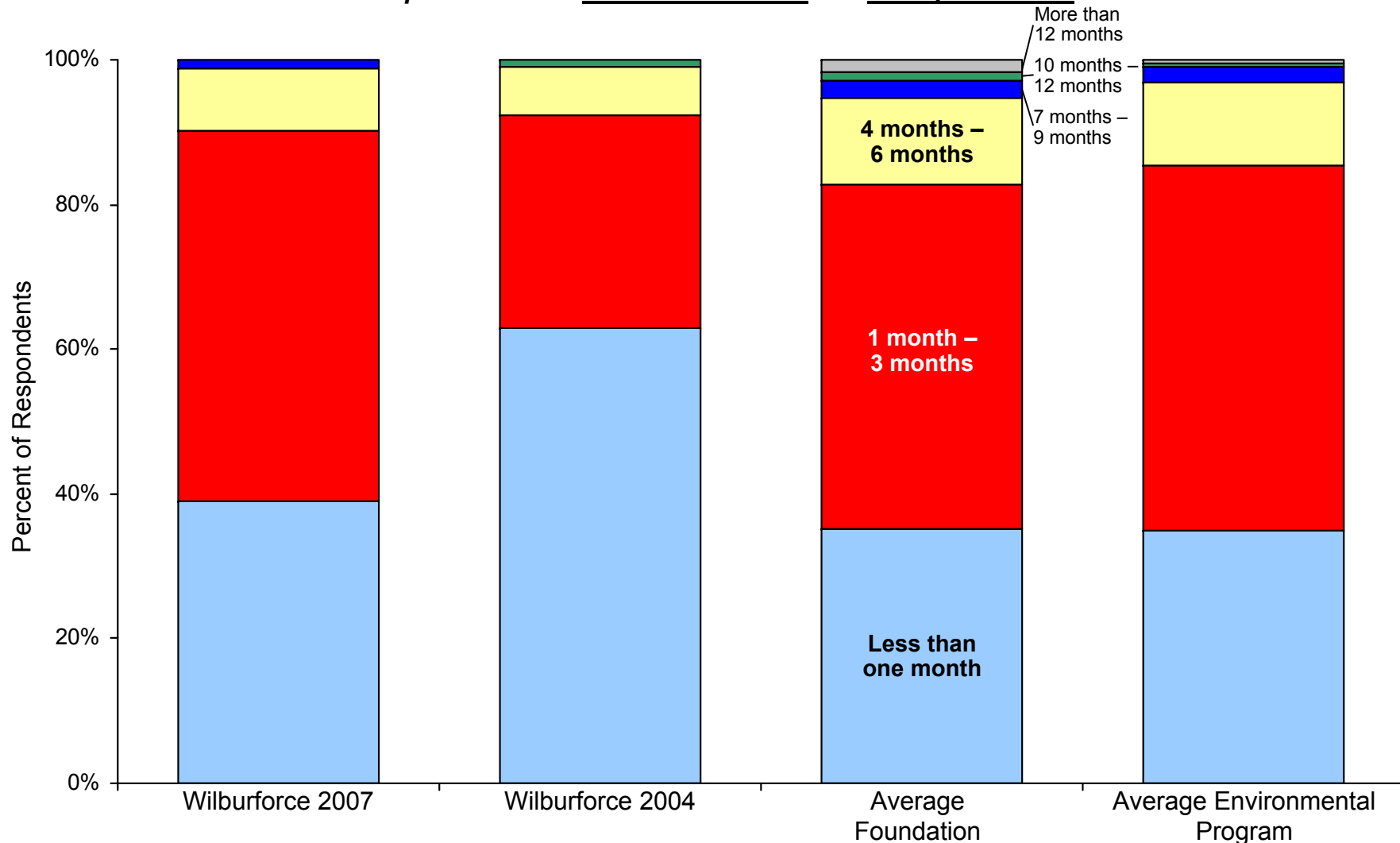
Note: This chart includes data about 123 foundations.

# Time Between Clear Commitment and Receipt of Funds

The proportion of Wilburforce grantees that report four months or more elapsing between clear commitment of funding and receipt of funds from the Foundation is:

- smaller than that of the average foundation
- smaller than that of the average environmental program

***Time Elapsed Between Clear Commitment and Receipt of Funds***

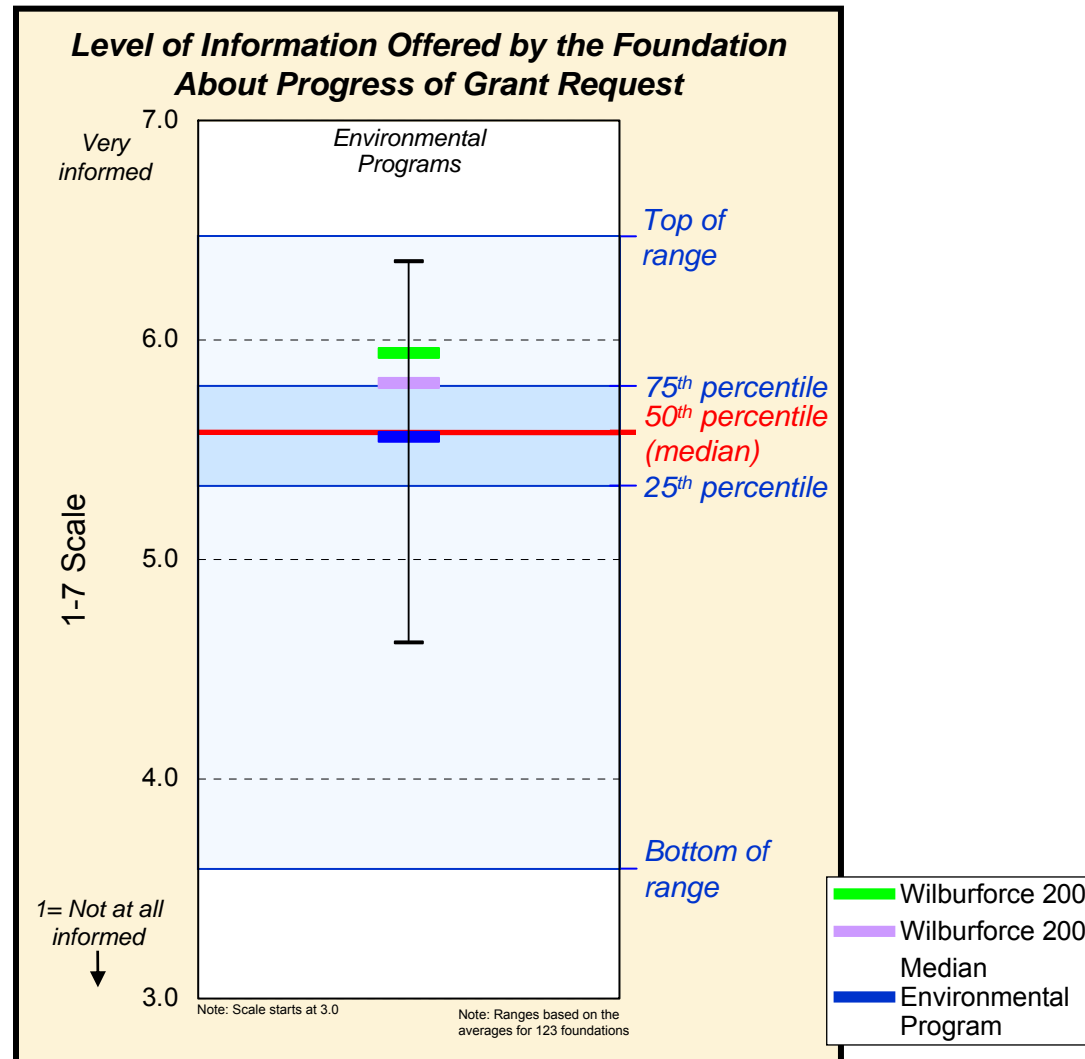


Note: This chart includes data about 123 foundations.

# Communication During Selection Process

On the level of information that the Foundation provides about the progress of the grant request, Wilburforce is rated:

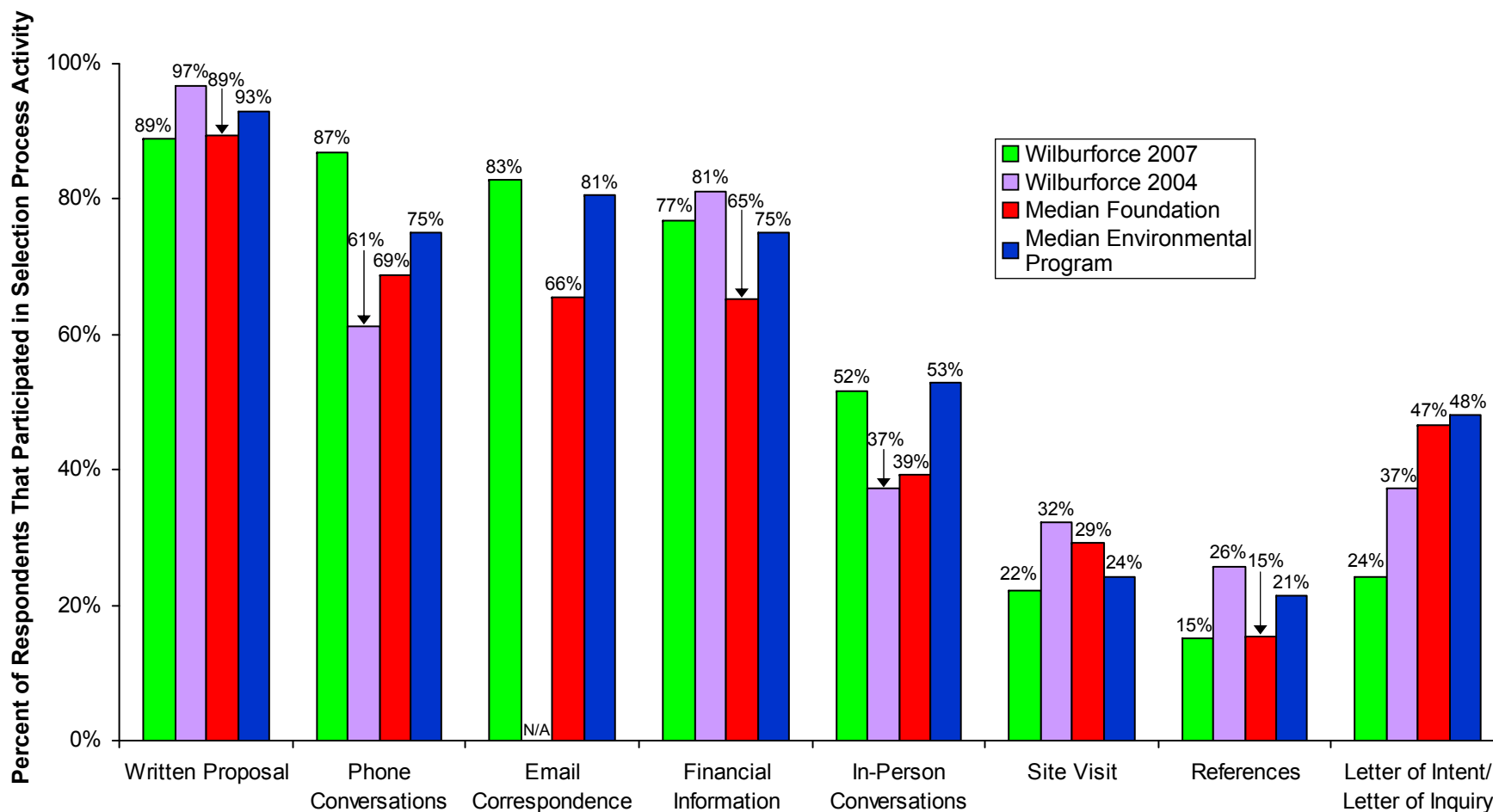
- above the median foundation
- above the median environmental program



# Selection Process Activities

Compared to grantees of the median foundation, Wilburforce grantees more frequently report engaging in phone and in-person conversations and email correspondence with Foundation staff as part of the selection process.

**Selection Process Activities**

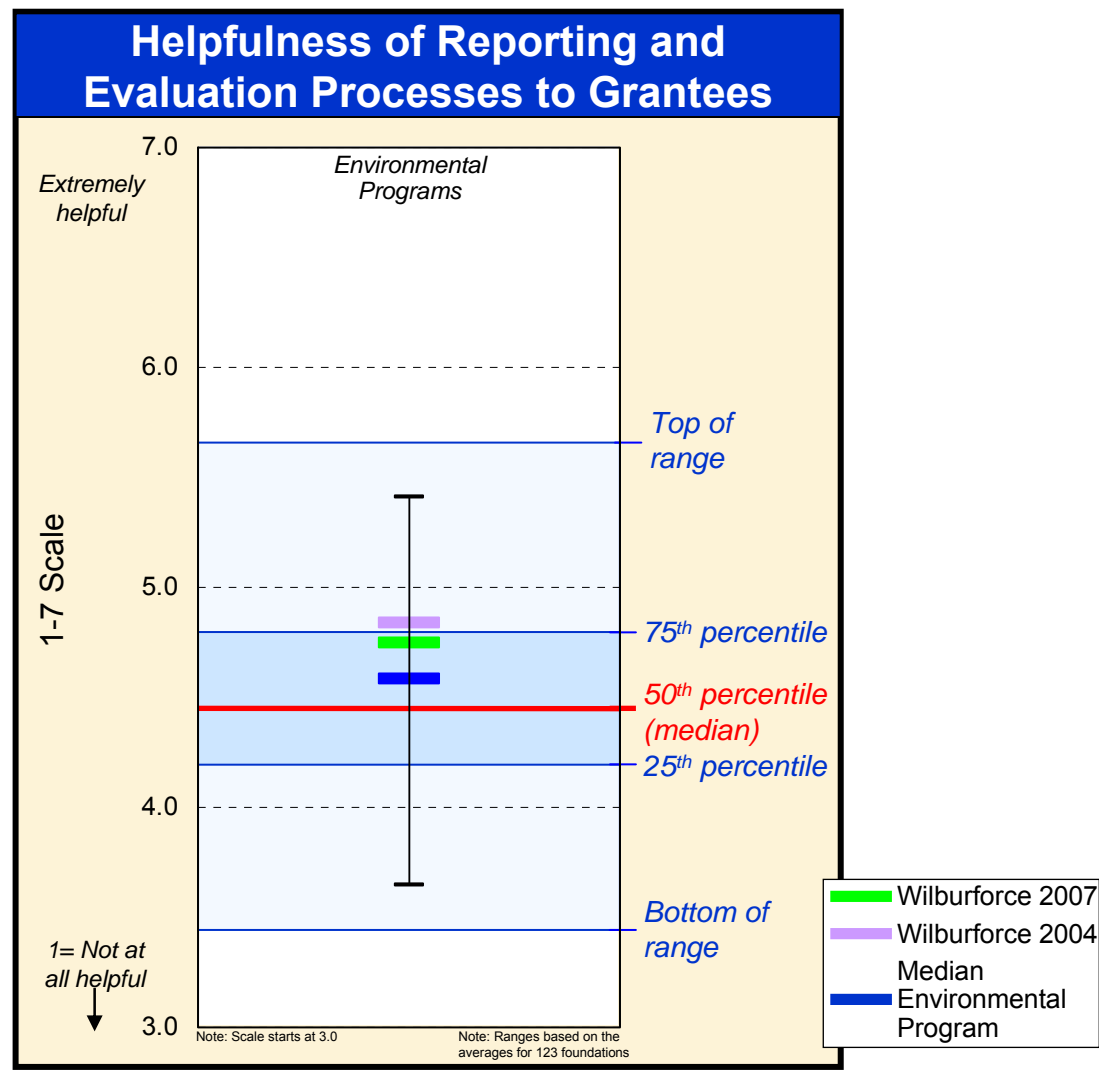


Note: This chart includes data about 123 foundations, with the exception of one category: "email correspondence" includes data about 52 foundations. Wilburforce 2004 data not available for "email correspondence" due to changes to the survey instrument.

# Helpfulness of Reporting and Evaluation Processes

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

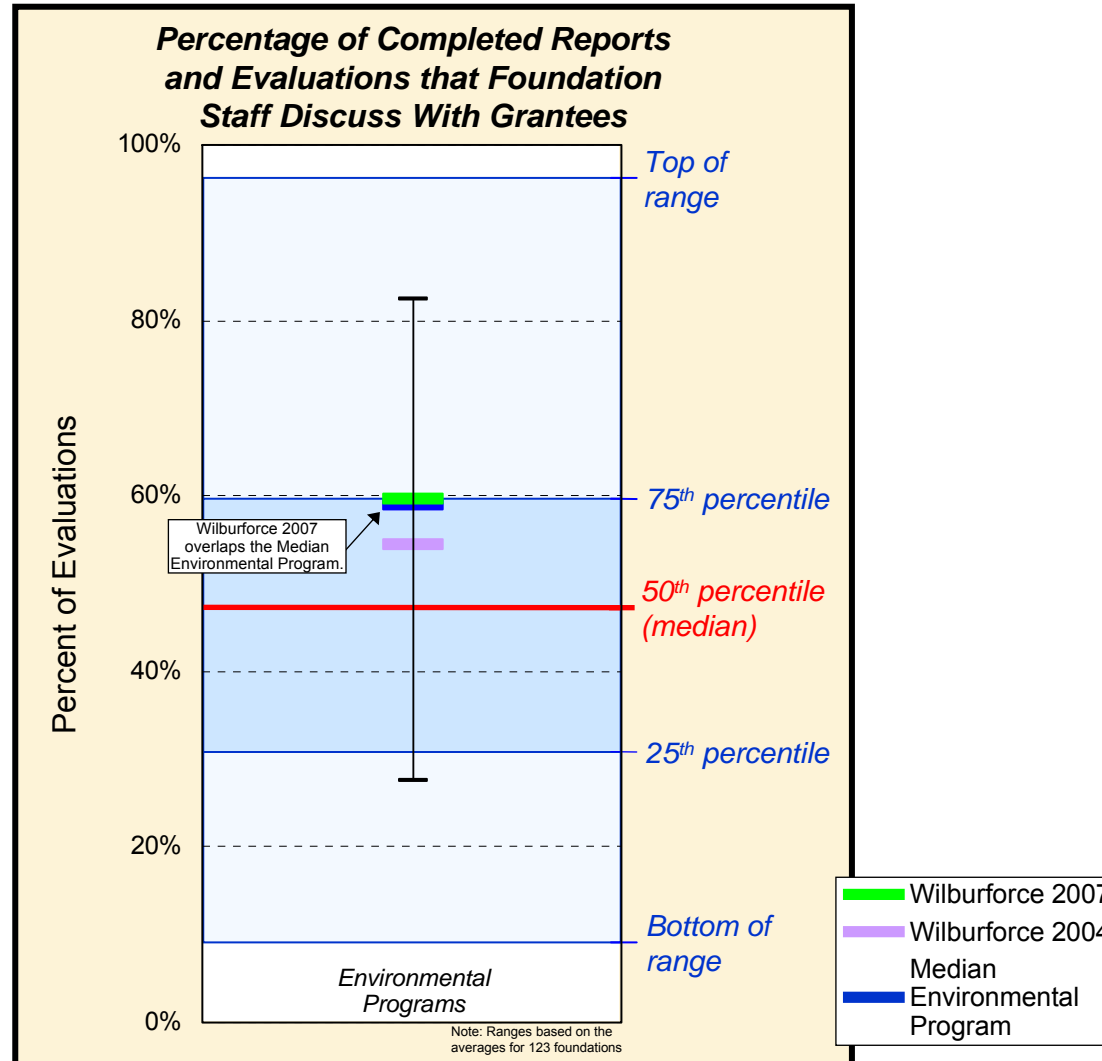
- above the median foundation
- above the median environmental program



# Reporting and Evaluation Processes

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

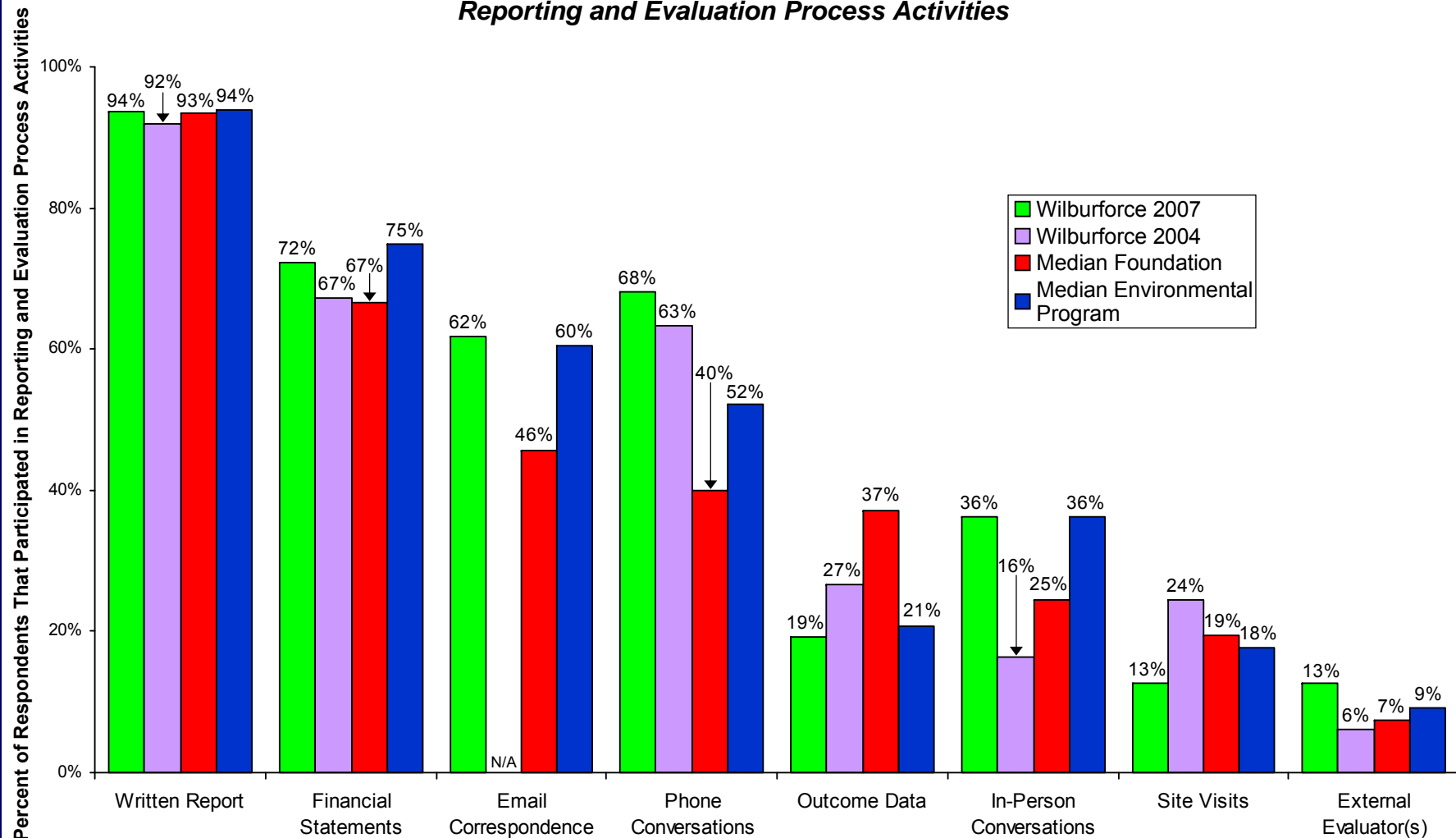
- larger than that of the median foundation
- similar to that of the median environmental program



# Reporting and Evaluation Process Activities

Wilburforce grantees more frequently report engaging in phone, email, and in-person conversations and email correspondence with Foundation staff as part of the reporting and evaluation processes than is typical.

*Reporting and Evaluation Process Activities*



Note: This chart includes data about 123 foundations, with the exception of one category: "email correspondence" includes data about 52 foundations. Wilburforce 2004 data not available for "email correspondence" due to changes to the survey instrument.

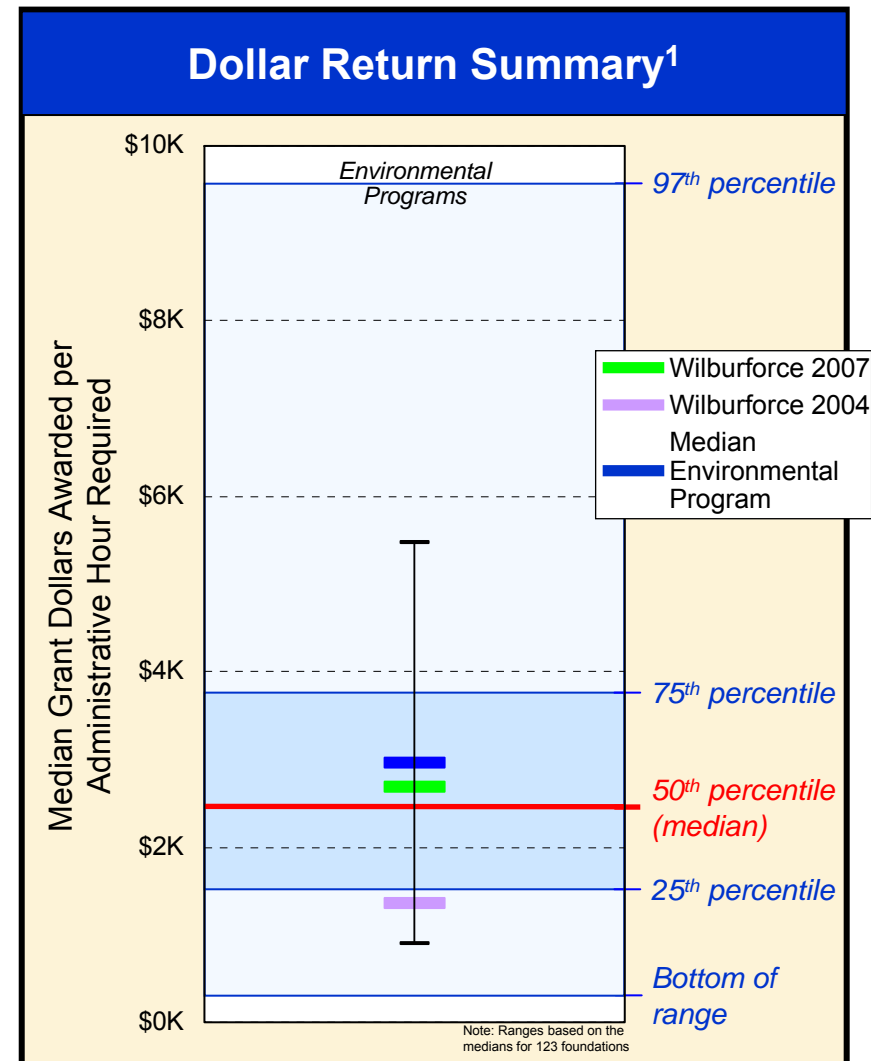
# Dollar Return Summary

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

- similar to that of the median foundation
- similar to that of the median environmental program

This summary includes:

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



<sup>1</sup>: 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.

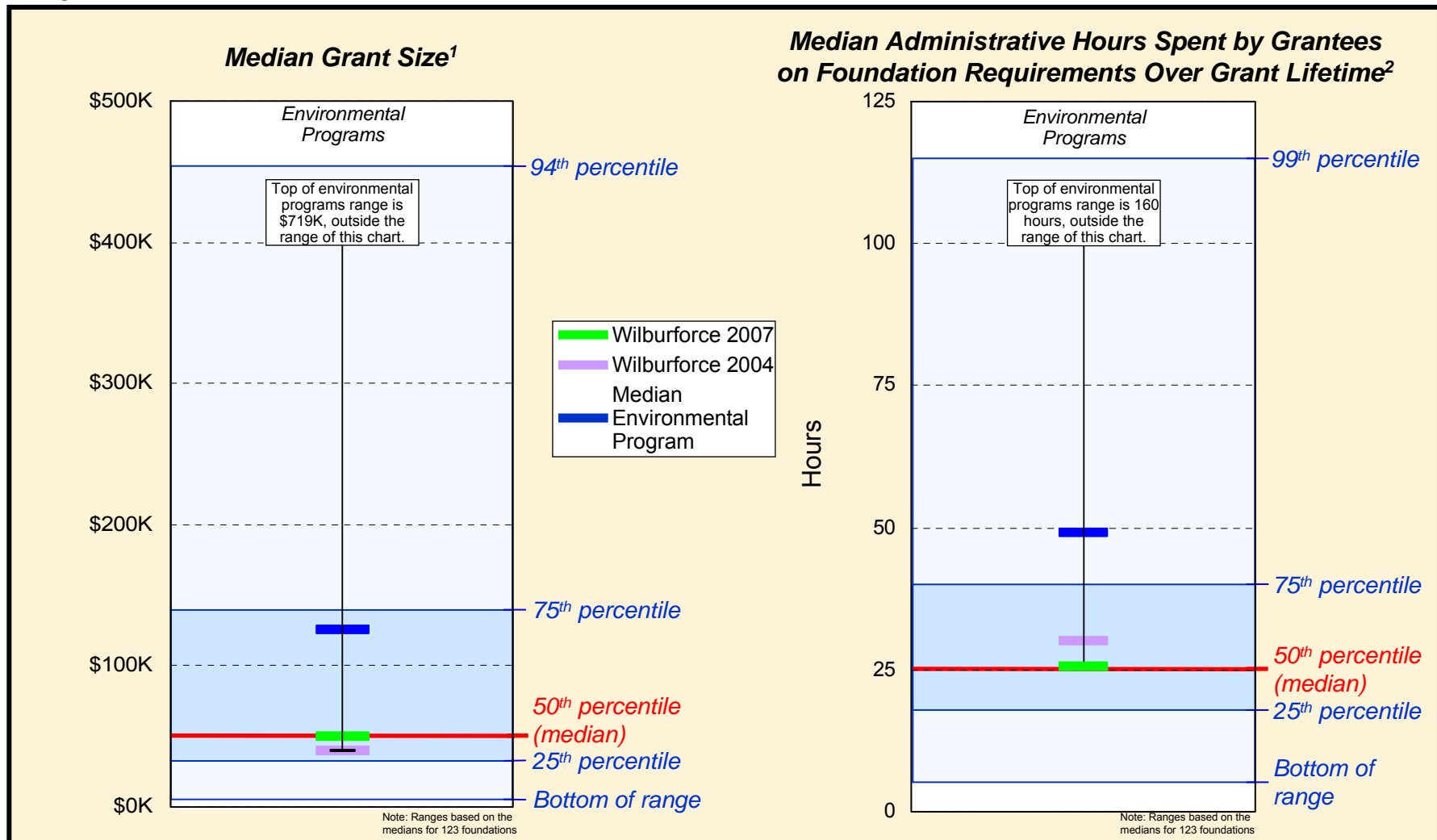
# Grant Size and Administrative Time

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

- similar to that of the median foundation
- smaller than that of the median environmental program

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

- similar to that of the median foundation
- smaller than that of all environmental programs



1: Chart does not show data from seven foundations whose median grant size exceeds \$500K.

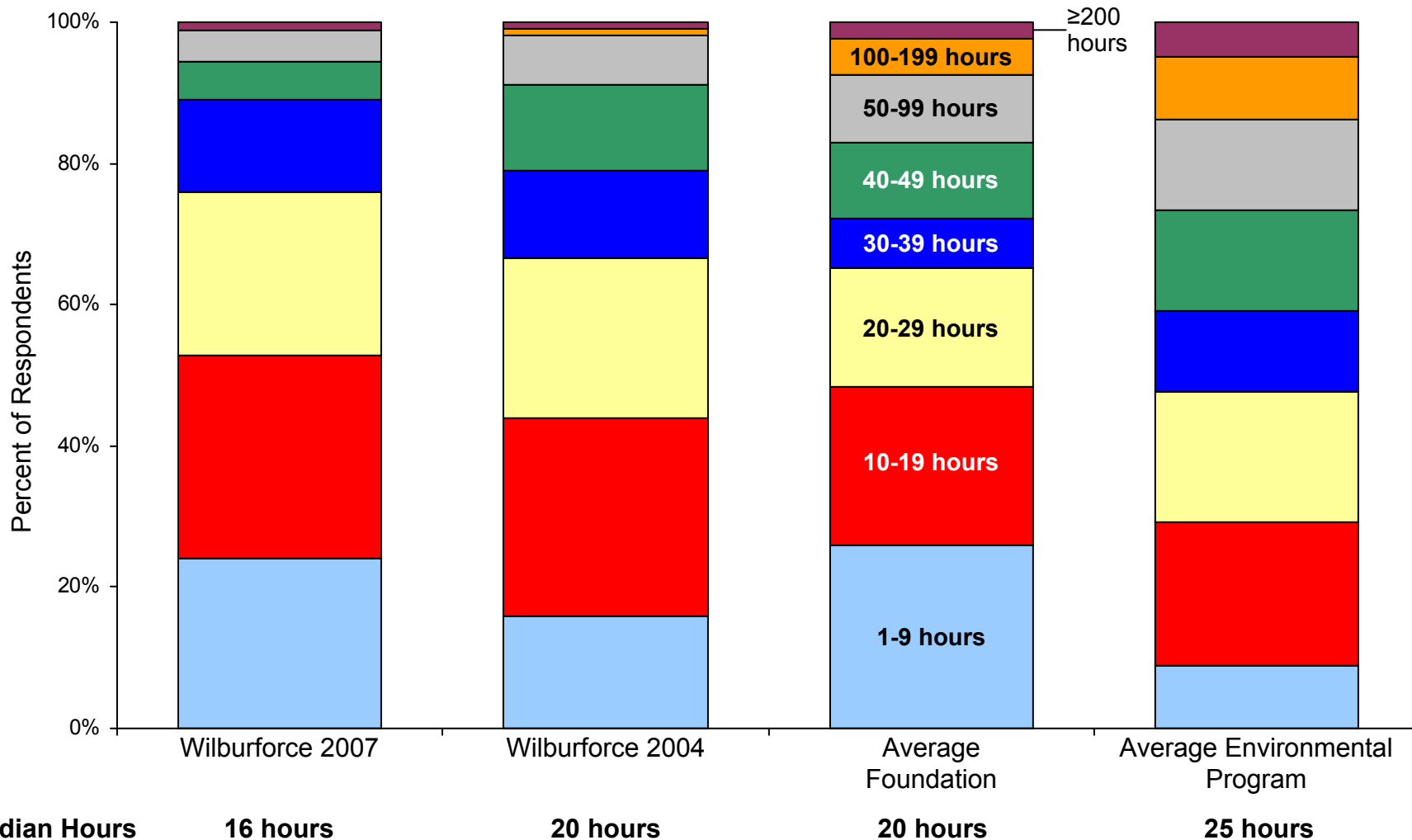
2: Chart displays total grant proposal creation, evaluation, and monitoring hours spent over the life of the grant; each of these events did not necessarily occur for each individual grantee. Chart does not show data from one foundation whose median administrative hours exceeds 125 hours.

# Administrative Time – Proposal and Selection Process

At the median, the number of hours of administrative time spent by Wilburforce grantees during the selection process is:

- less than the time spent by grantees of the median foundation
- less than the time spent by grantees of the median environmental program

**Median Administrative Hours Spent by Grantees on Proposal and Selection Process**

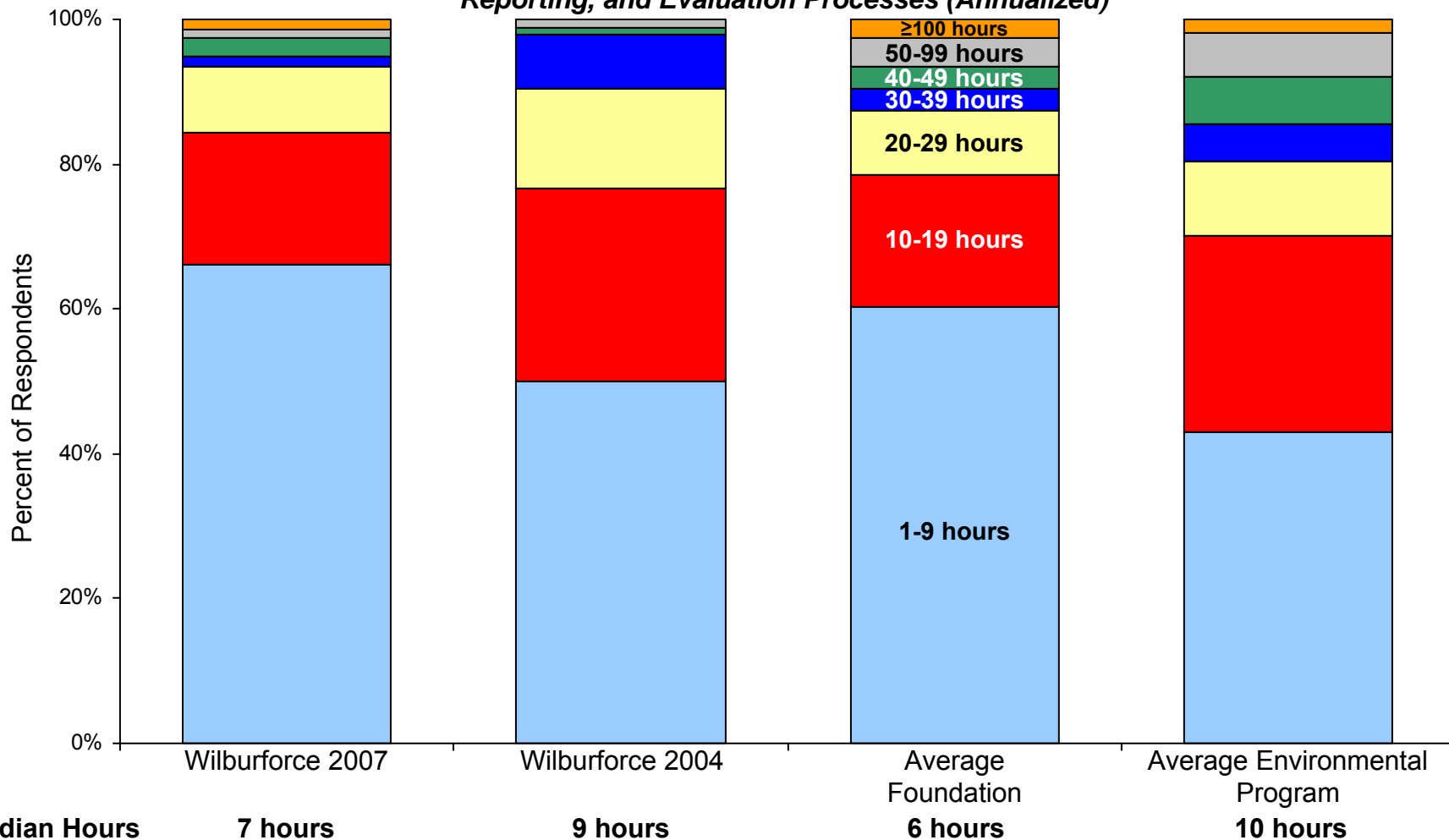


# Administrative Time – Reporting and Evaluation Processes

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

- similar to the time spent by grantees of the median foundation
- similar to the time spent by grantees of the median environmental program

**Median Administrative Hours Spent by Grantees on Monitoring, Reporting, and Evaluation Processes (Annualized)<sup>1</sup>**



<sup>1</sup>: "Evaluation" in the survey includes any activity considered by grantees to be part of an evaluation, and does not necessarily correspond to the Foundation's definition.

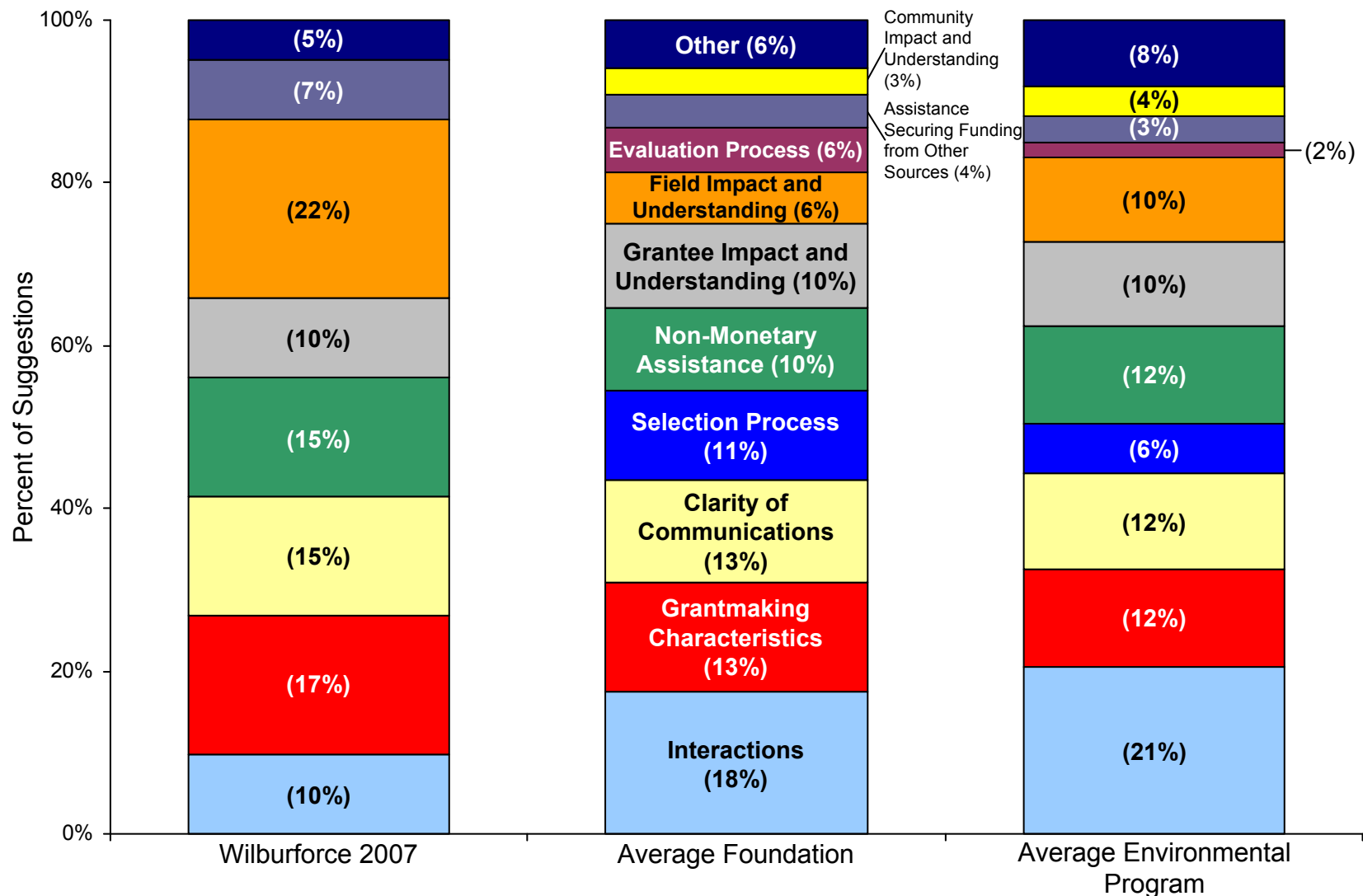
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# Grantee Suggestions for the Foundation (1)

Grantees were asked to provide any suggestions for how the Foundation could improve. A larger than typical proportion of Wilburforce's suggestions concern the Foundation's impact on and understanding of grantees' fields.

**Topics of Grantee Suggestions**



Note: This chart includes data about 83 foundations. There were a total of 41 grantee suggestions for Wilburforce. Wilburforce 2004 data not available due to changes to the survey instrument.

# Grantee Suggestions for the Foundation (2)

Wilburforce grantees made a total of 41 suggestions for the Foundation's improvement.

Topic of Grantee Suggestion	% of Wilburforce Grantee Suggestions	% Average Foundation Suggestions	% Average Environmental Program Suggestions	Wilburforce Grantee Suggestions
Field Impact and Understanding	22%	6%	10%	<p><b>Broaden Scope of Strategy / Strategy Development:</b> "I ... think that when campaigns are being assessed and resources allocated, it would help to have all grantees in the room with Wilburforce to deliberate on priorities and outcomes. Allocation sometimes seems to be based on disjointed communications that don't capture the full range of priority work necessary for gains over the medium to long term." "Continue to investigate all information sources and get all sides of the story and don't rely on a small or select group of individuals for 'intel' about the areas the Foundation is operating in." "There are many ways to understand and approach a problem, and their support could have more impact by supporting broader methods to achieve goals. Their work is important, but could have added value by increasing the scope of what they might consider fundable organizations and projects." "There is a lot of focus on high level strategies by the Foundation, with less appreciation of the fine work needed to make those strategies successful on the ground. More balance there would be great." "One suggestion I would have for the Foundation would be to look at some of their geographic priorities to determine if there is a better way of achieving their conservation objectives, particularly in light of climate change. Ecosystem-specific programs may not be as effective in a world significantly impacted by climate change."</p> <p><b>Longer-term Commitment to Issues:</b> "The issues we deal with are systemic and require a long time to turn around. Unfortunately, Foundation priorities have changed quite frequently, and the level of funding has fluctuated enough to make it hard for us to plan for the long-term ... If I have one recommendation, it would be for the Foundation to commit its resources to one issue (with a concrete goal), or a number of specific organizations that the Foundation believes can be catalysts for change." "Moving away from hard rock mining issues when the issue is peaking and more funds would have a significant impact on outcomes worked on for nearly a decade seems unfortunate."</p>
Grantmaking Characteristics	17%	13%	12%	<p><b>Multi-year Grants:</b> "Multi-year grants from Wilburforce would help us leverage larger and longer-term funding from others." "Multi-year grants aid in long-term planning and sustainability. I suggest further commitment in this type of granting."</p> <p><b>Operating Support:</b> "We would prefer that the Foundation provide operational funds to be used at our discretion to support our program rather than directing that portions of the grant be disbursed to individuals or activities of the program director's choosing. This appears to be the case now with new program officers."</p>

# Grantee Suggestions for the Foundation (3)

Topic of Grantee Suggestion	% of Wilburforce Grantee Suggestions	% Average Foundation Suggestions	% Average Environmental Program Suggestions	Wilburforce Grantee Suggestions
Clarity of Communications	15%	13%	12%	<p><b>Better Understanding of Strategy:</b> “I would like to be engaged in understanding the Foundation’s strategic plans for the Y2Y region and how our organization fits into their plan.” “I would like to better understand why we are discouraged from using Wilburforce funds to lobby.” “I do not feel as though the Foundation’s new strategy has been fully communicated to our community ... Wilburforce has a bold new vision and it should not be afraid to lead ... The impact could be significantly deeper if these funding decisions were coupled with occasional communications from the Foundation about its vision and about exciting new projects and success stories that it believes will help inspire its grantees to new levels of performance.” “Over the last two years I have observed a drop in communications and a lack of a cohesive strategy in how to protect biodiversity in the northern Rockies.” “A better understanding of what it would take to be considered for a multi-year or expanded commitment from the Foundation for new areas of work would be helpful.”</p> <p>“Periodic updates from the board.”</p>
Non-Monetary Assistance	15%	10%	12%	<p>“It would be great to expand our working relationship as well as non-monetary assistance.” “I think it would be great to get their grantees together once a year in the different regions to share experiences, challenges, etc.” “[Get] TREC to take on only clients it can service.” “More attention to the health of key individuals within organizations that are being supported would be great ... Still more could be done to sustain those people and by extension their groups.” “I have a vague sense that I have somehow missed the ‘orientation’ about all the non-monetary assistance that is available to Wilburforce grantees ... My suggestion is that the Foundation periodically explain all the various forms of assistance that are available to its grantees.” “We would benefit from more regular communication, particularly regarding successful strategies/successes they are learning about with other organizations working in translating conservation biology into on-ground conservation and more ecologically-sound public lands policy.”</p>
Interactions	10%	18%	21%	<p><b>Site Visits:</b> “My only hope would be to provide Wilburforce staff with the time to do field visits in the region.” “Maybe more site visits!”</p> <p>“I think your Y2Y staff are stretched a bit thin. I find it difficult to get through to staff in a timely way. When I do get time we have productive meetings but it seems like there has been a fall-off in the ability of foundation staff to respond.”</p>

# Grantee Suggestions for the Foundation (4)

Topic of Grantee Suggestion	% of Wilburforce Grantee Suggestions	% Average Foundation Suggestions	% Average Environmental Program Suggestions	Wilburforce Grantee Suggestions
Grantee Impact and Understanding	10%	10%	10%	“Discuss with us, outside the normal calendar of funding proposals, etc., what the more systemic challenges are for our organization.” “The Foundation has developed a reputation that is universally positive, but it also has created some controversy at times by imposing its values in what some view as punitive ways when the Foundation and the organization see a particular issue differently.” “Potentially more critical feedback about how we could be more effective, and suggestions from their experience on how to move in that direction.” “Give a presentation to the Board so they can understand better the relative importance of our mission to their overall priorities.”
Assistance Securing Funding from Other Sources	7%	4%	3%	“If Foundation staff had time it would be great if they were able help us develop relationships with the foundations that support work in northern BC and Alaska but not the Yukon.” “I might be able to use additional advice/guidance on obtaining funds from other foundations.” “It would be helpful to have the Wilburforce Foundation write a formal letter of support for the work they are supporting which can be sent with other grant applications.”
Other	5%	6%	8%	“There was for us some confusion about whom to talk to about a potential grant because it is part science-based and part place-based, and the latter in several potential places. This meant most of the Foundation staff had to be involved ... There could be a role for someone to direct general support grants, or to act as internal organizer for grants that span the various science and place-based interests of the Foundation.” “Consider some form of retirement package for retiring conservationists.”

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# Review of Findings

Chart shows Wilburforce's 2007 (◆) and 2004 (◇) percentile rank and the percentile rank of the median environmental program (◆) among all foundations in the comparative set.



X. Review of Findings and Analysis and Discussion

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.
Quality of 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 Ratings and Improvement on Many Dimensions

- Wilburforce Foundation is rated highly by its grantees on most dimensions of the grantee surveys. The Foundation is often rated above the median foundation in the comparative set and the median environmental program, and receives particularly high ratings on measures of impact on and understanding of grantees organizations and fields, overall satisfaction, and quality of interactions.
- Wilburforce has received significantly higher ratings<sup>1</sup> in this survey than it did in 2004 in several areas, including:
  - Overall satisfaction (6.8 in 2007 vs. 6.5 in 2004)
  - Understanding of grantees' organizations (6.1 vs. 5.6)
  - Understanding of grantees' local communities (5.2 vs. 4.9)
  - Fairness of treatment of grantees (6.8 vs. 6.6)
  - Responsiveness of Foundation staff (6.6 vs. 6.3)
  - Grantee comfort in approaching the Foundation if a problem arises (6.5 vs. 6.2)
- On many other measures the trend is positive and the Foundation did not receive any significantly lower ratings than it did in 2004.
  - *Can the Foundation continue to be explicit about its operating model in order to maintain positive ratings in the future?*

## Areas for Discussion (2)

### ♦ Non-monetary Assistance

- Wilburforce provides a larger than typical proportion of its grantees with non-monetary assistance and the helpfulness of its assistance activities tend to be rated as positively or more positively than similar activities provided by the median foundation.
- Grantees that receive some sort of non-monetary assistance rate the Foundation more positively than grantees that did not receive any non-monetary assistance on a variety of measures. These include the Foundation's impact on and understanding of grantee's organizations, its understanding of and advancement of knowledge in grantees fields, clarity of communication of goals and strategies, and overall satisfaction.
  - *Are there opportunities to further encourage grantees to take advantage of the Foundation's non-monetary assistance resources?*

### ♦ Site Visits to Grantee Organizations

- Wilburforce tends to interact with its grantees as frequently as typical and a smaller than typical proportion report interacting with the Foundation yearly or less frequently. However, the Foundation conducts site visits to 38 percent of grantees – a smaller than typical proportion.
- Grantees that received a site visit rate the helpfulness of the Foundation's selection and evaluation processes more positively than grantees that did not.
- In responses to open-ended comments, several grantees suggested that the Foundation conduct a site visit to their organization.
  - *Can and should Wilburforce conduct site visits to more grantee organizations?*

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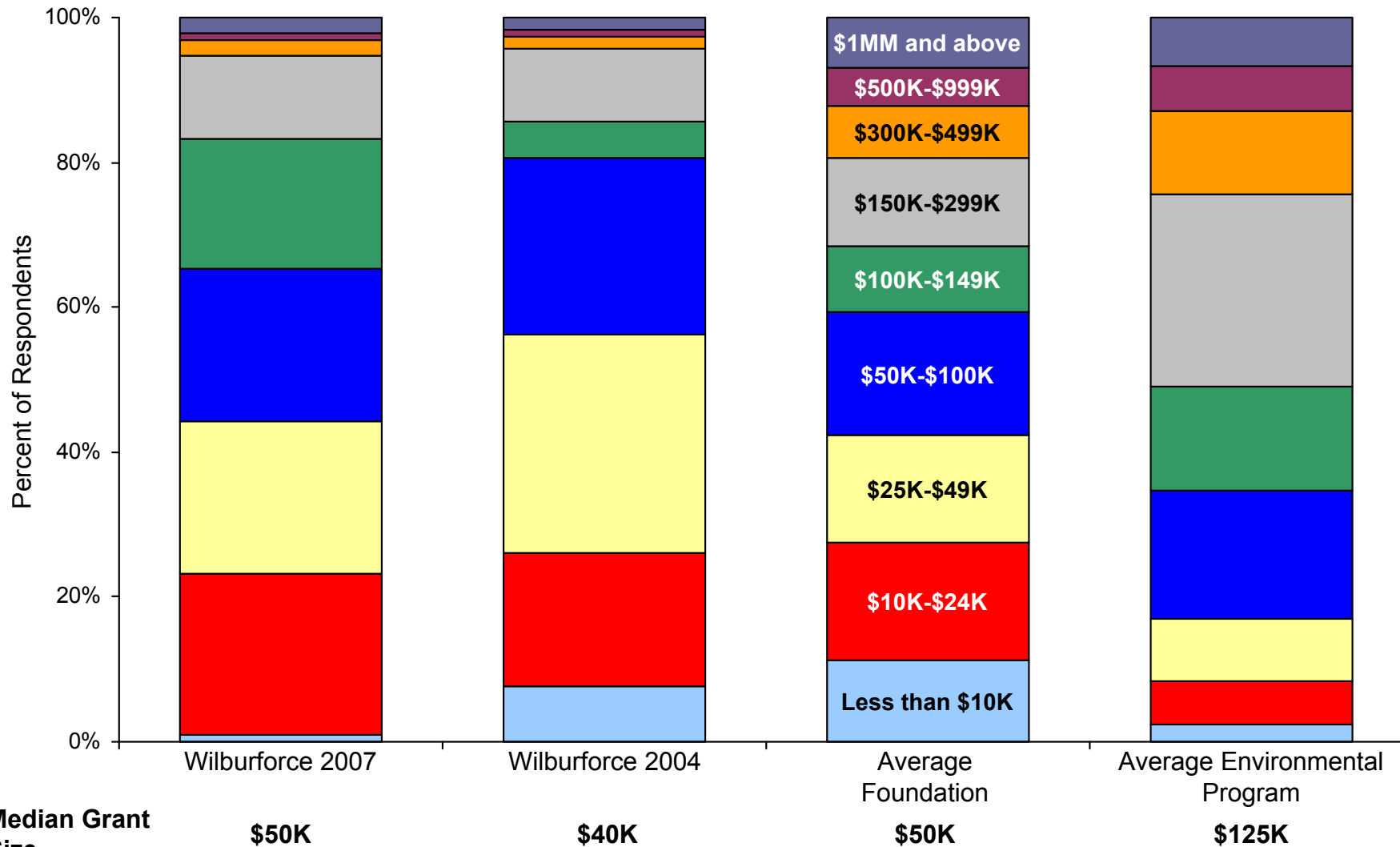
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# Grant Amount

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

- similar to that of the median foundation
- smaller than that of the median environmental program

Size of Foundation Grants



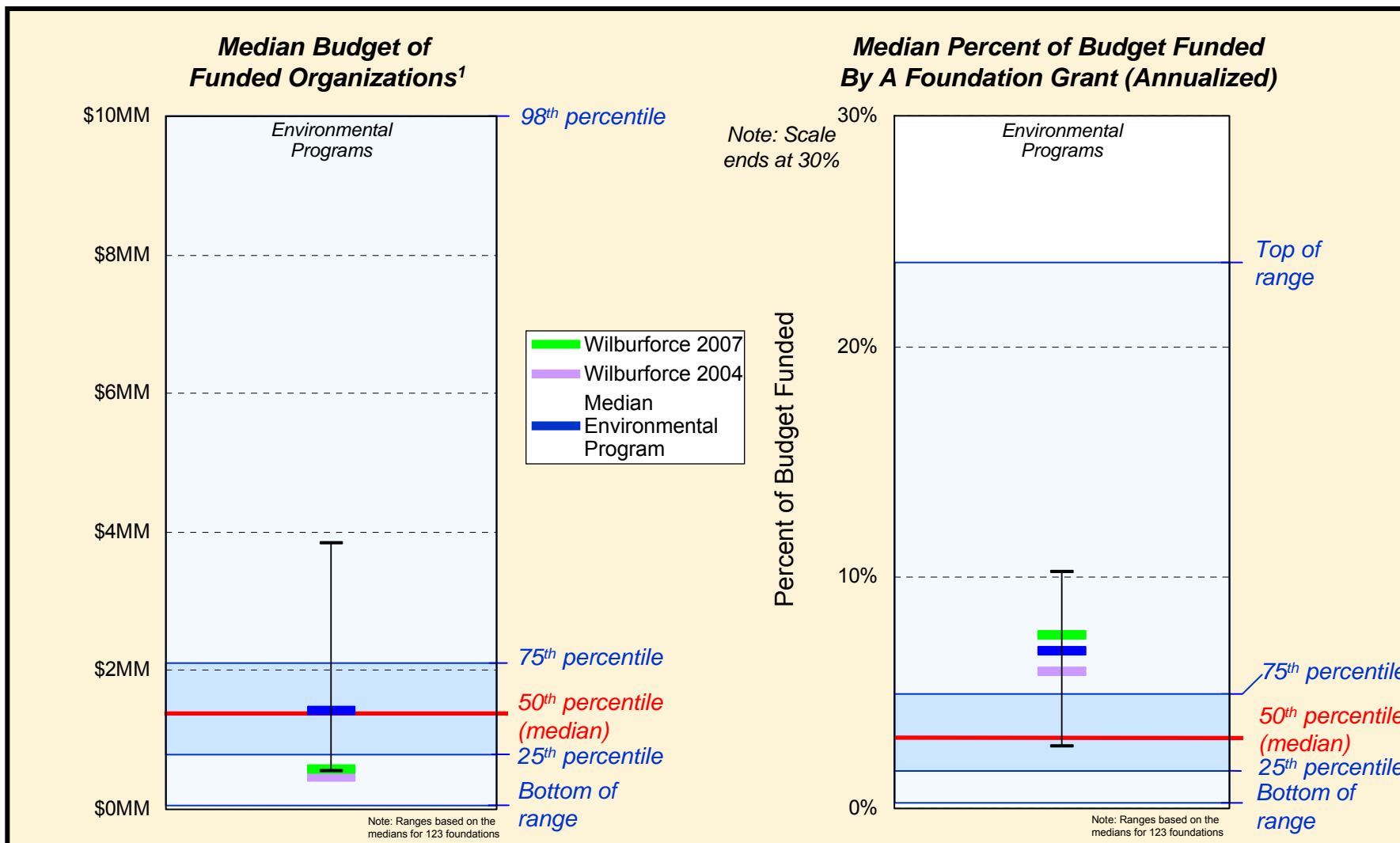
# Size of Grantee Budget Relative to Size of Grant

The median budget of Wilburforce grantees is:

- smaller than that of the median foundation
- smaller than that of the median environmental program

The median proportion of grantees' budgets funded by Wilburforce is:

- greater than that of the median foundation
- similar to that of the median environmental program

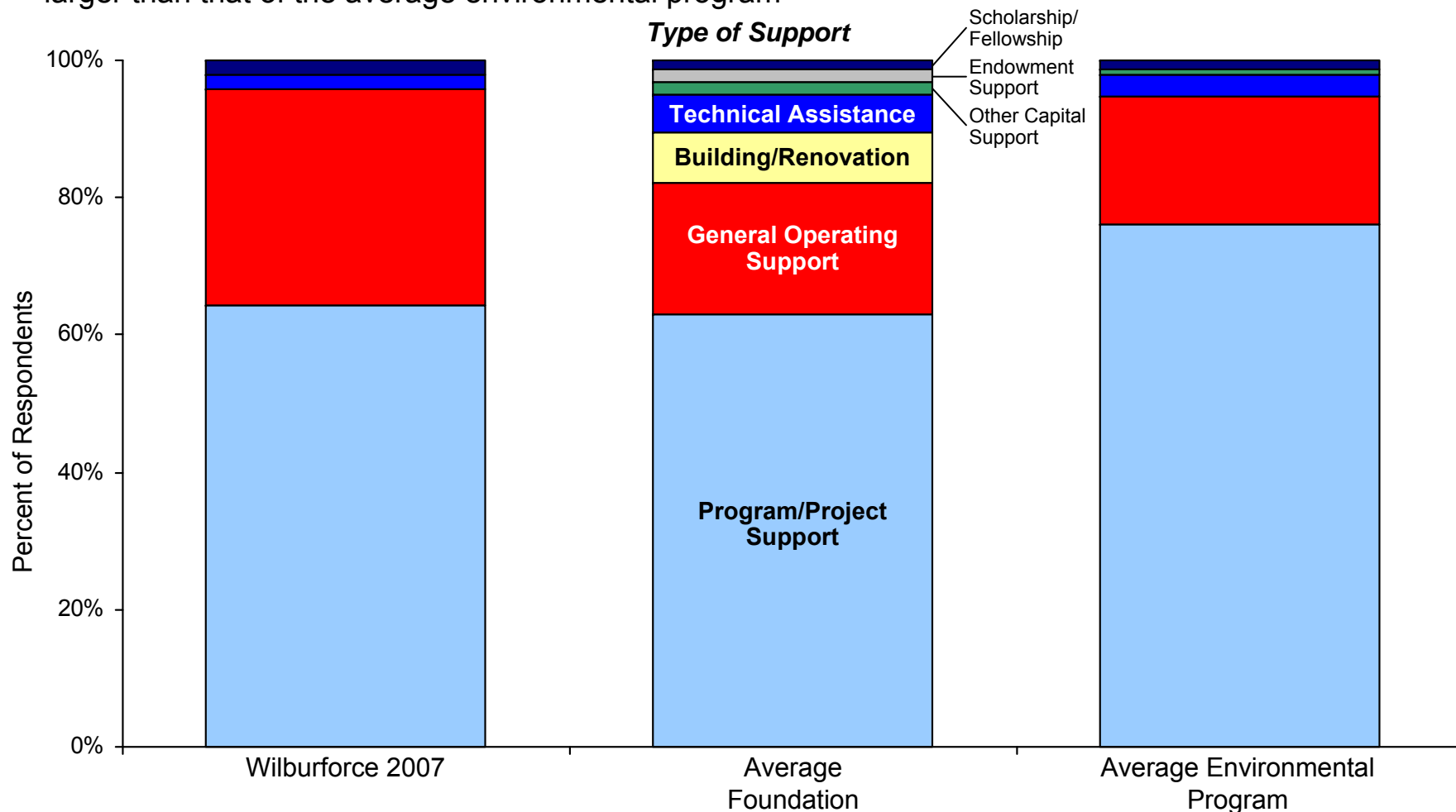


1: Chart range does not show two individual foundation medians of more than \$10MM.

# Type of Support

The proportion of Wilburforce grantees that were awarded a general operating support grant is:

- larger than that of the average foundation
- larger than that of the average environmental program

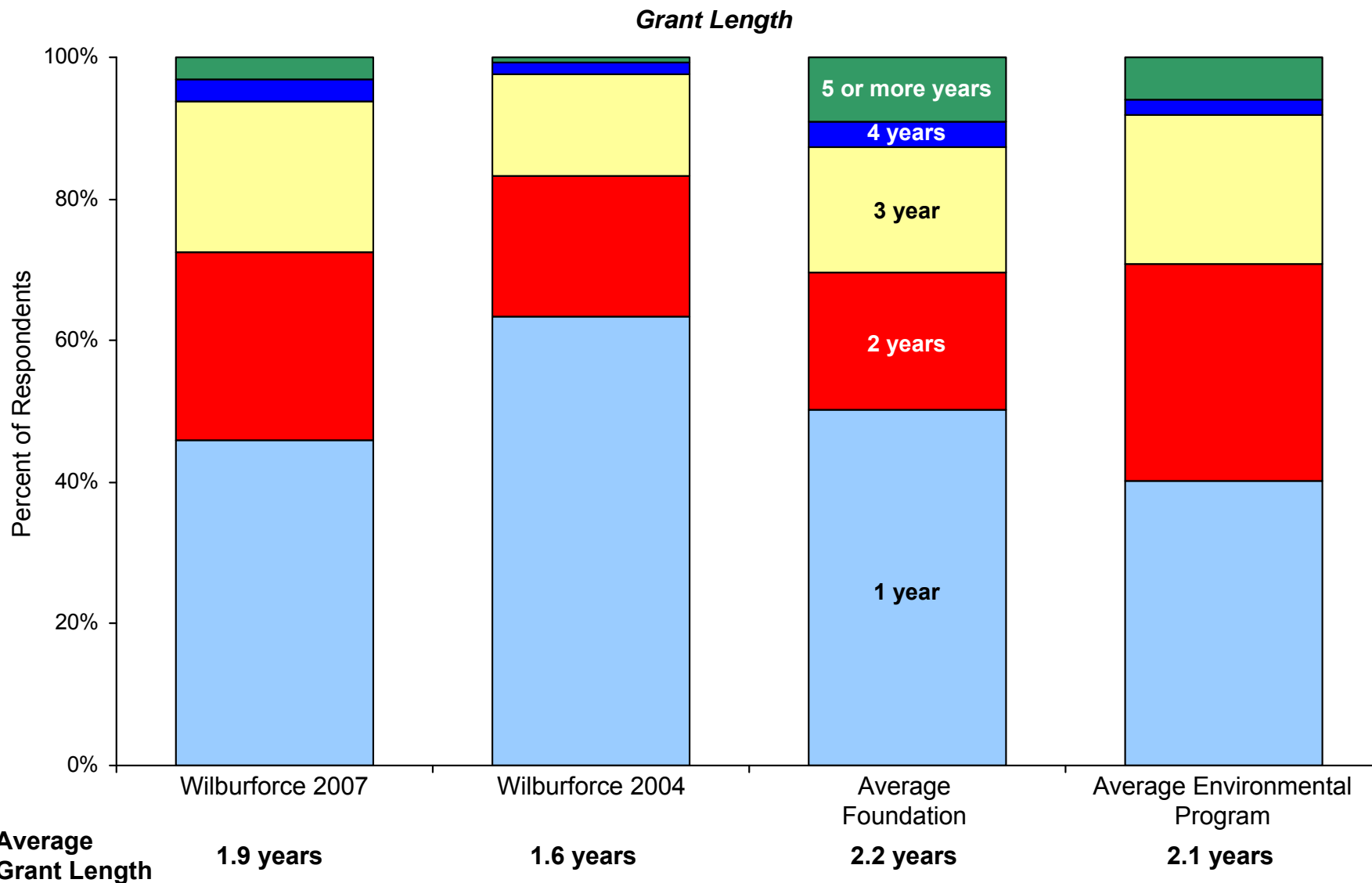


*Survey-Wide Analysis Fact:* By itself, type of grant awarded is not an important predictor of grantees' ratings of a foundation's impact on their organizations. However, ratings of impact on the grantee organization are higher for operating than program support grantees when those operating support grants are larger and longer term than what foundations typically provide. For more information on these findings, please see CEP's report, *In Search of Impact: Practices and Perceptions in Foundations' Provision of Program and Operating Grants to Nonprofits*.

# Grant Length

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

- similar to that of the average foundation
- similar to that of the average environmental program



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

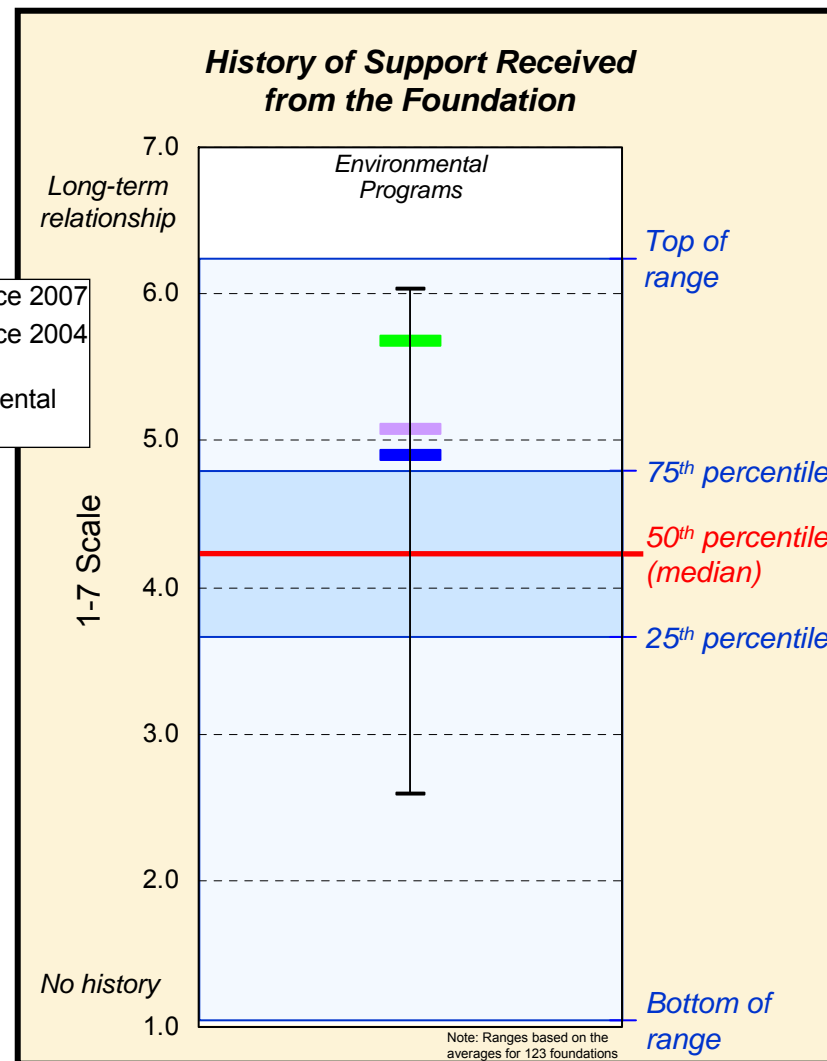
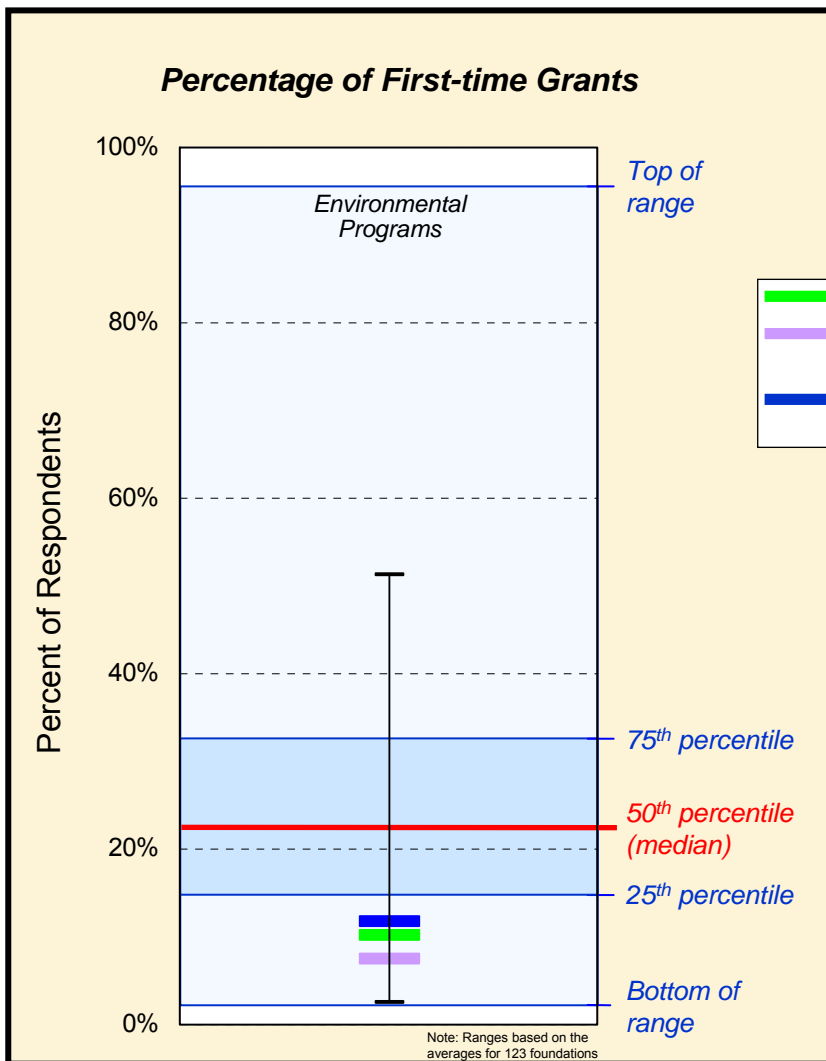
# History of Foundation Support

The proportion of first-time grant recipients of Wilburforce is:

- smaller than that of the median foundation
- smaller than the median environmental program

The history of support provided to grantees at Wilburforce is:

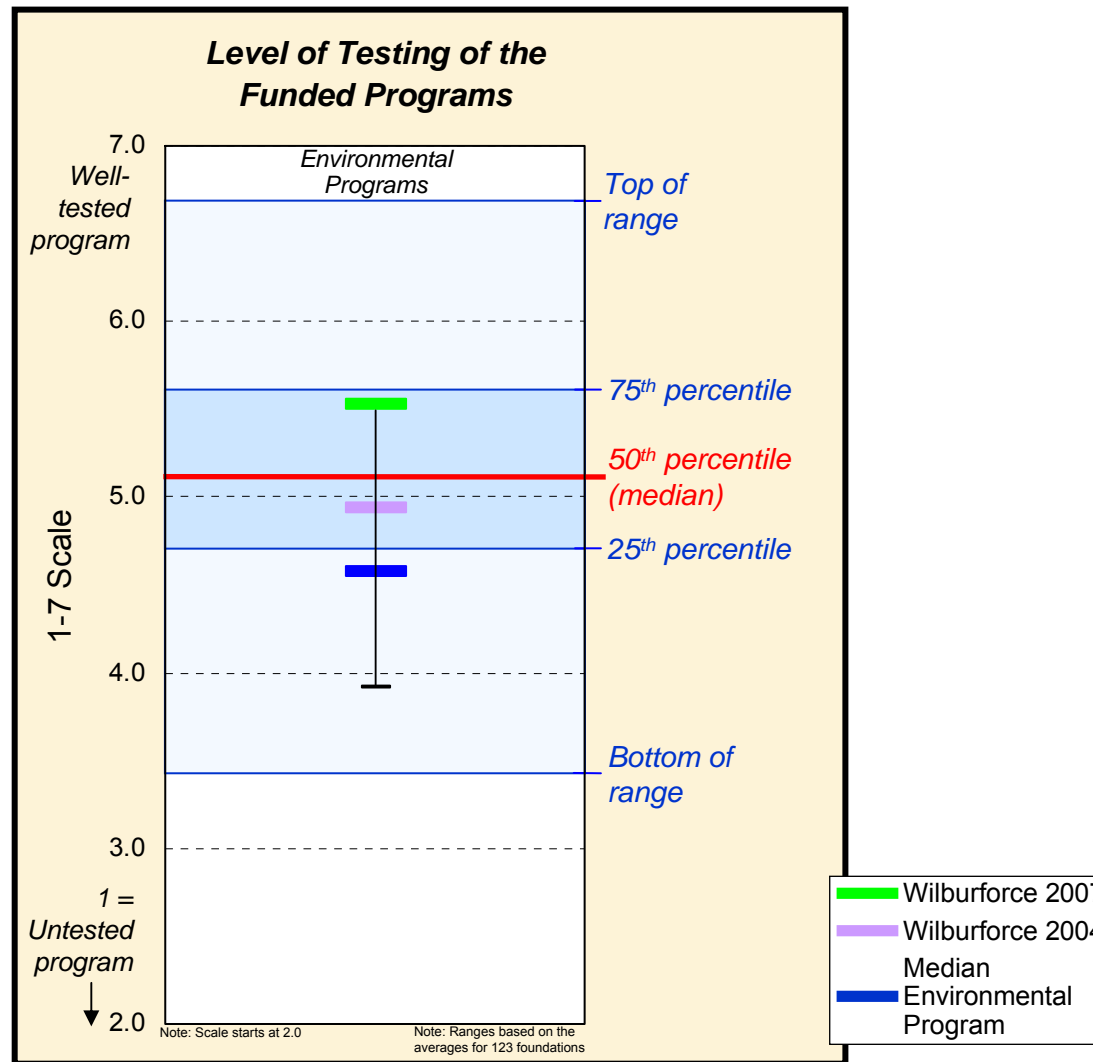
- longer than that of ninety percent of surveyed foundations
- longer than that of the median environmental program



# Level of Testing of Funded Programs

The average level of testing of projects funded by the Foundation is:

- greater than that of the median foundation
- greater than that of all environmental programs

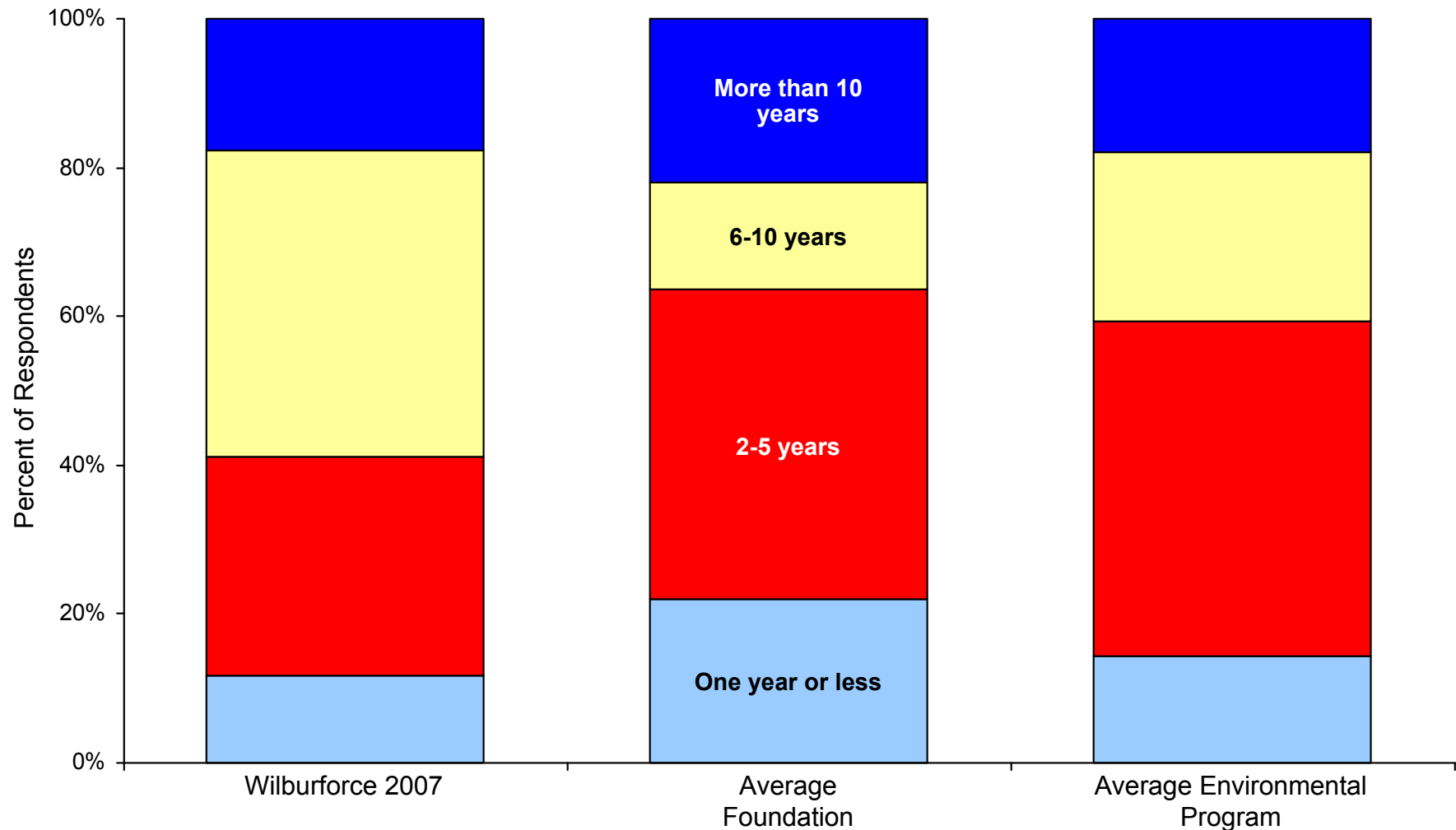


# History of Funded Programs

The proportion of Wilburforce grantees that report having conducted funded programs for six years or more is:

- larger than that of the average foundation
- larger than that of the average environmental program

*Length of Time Which Grantees Have Regularly Conducted the Funded Programs*

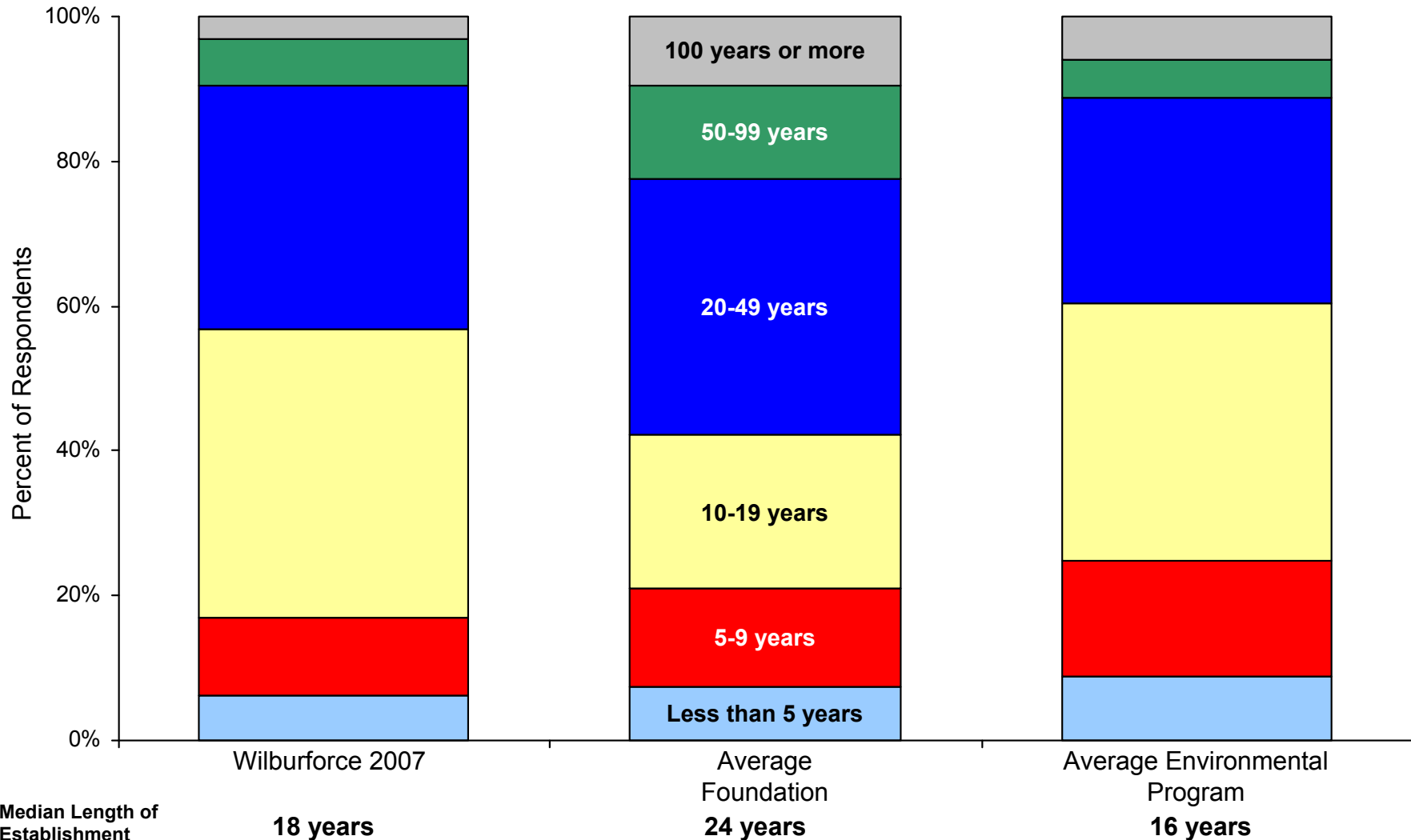


# Length of Establishment of Grantee Organizations

At the median, the length of establishment of Wilburforce grantees' organizations is:

- shorter than that of the median foundation
- similar to that of the median environmental program

*Length of Establishment of Grantee Organizations*

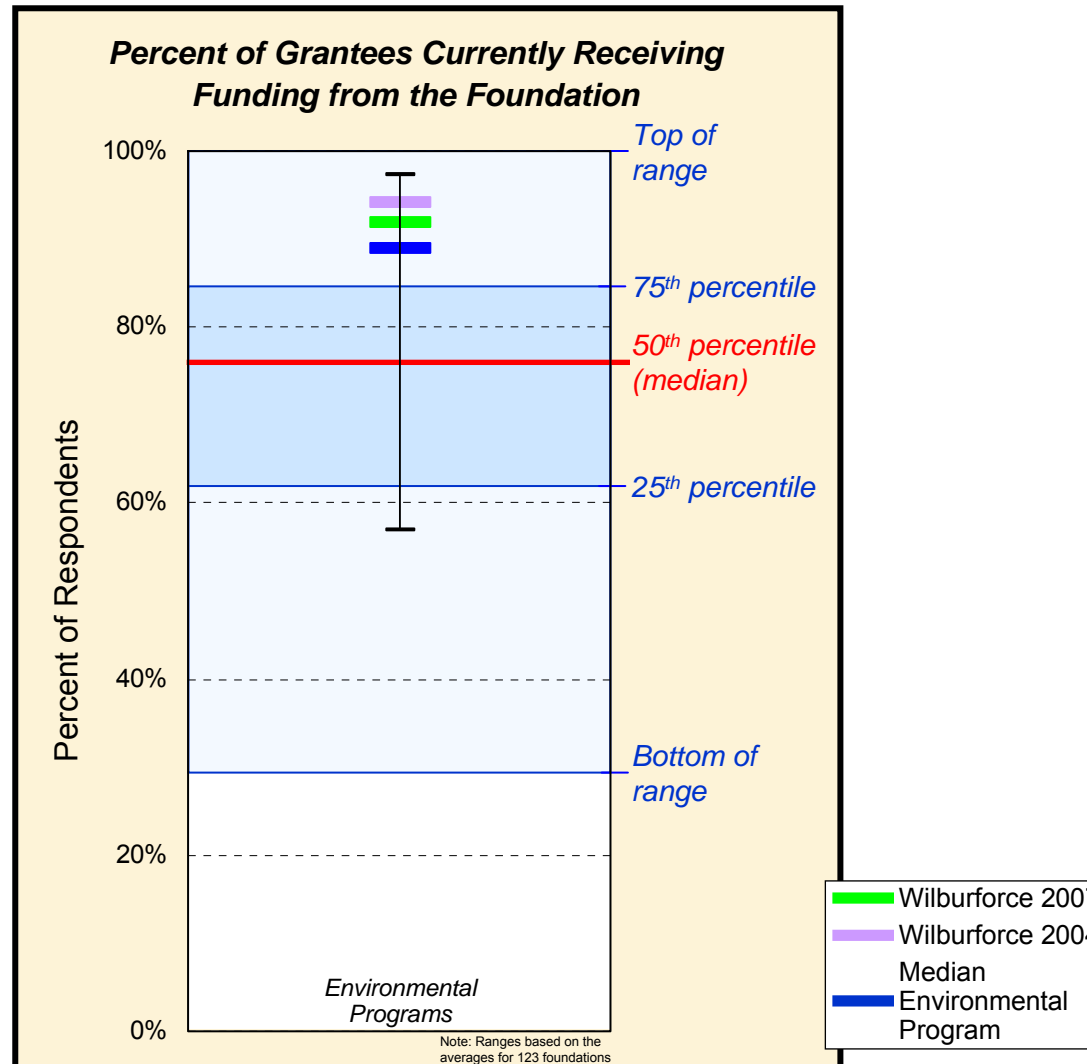


Note: This chart includes data about 123 foundations. Wilburforce 2004 data not available due to changes to the survey instrument.

# Funding Status

The proportion of Wilburforce grantees that were currently receiving funding at the time of the survey is:

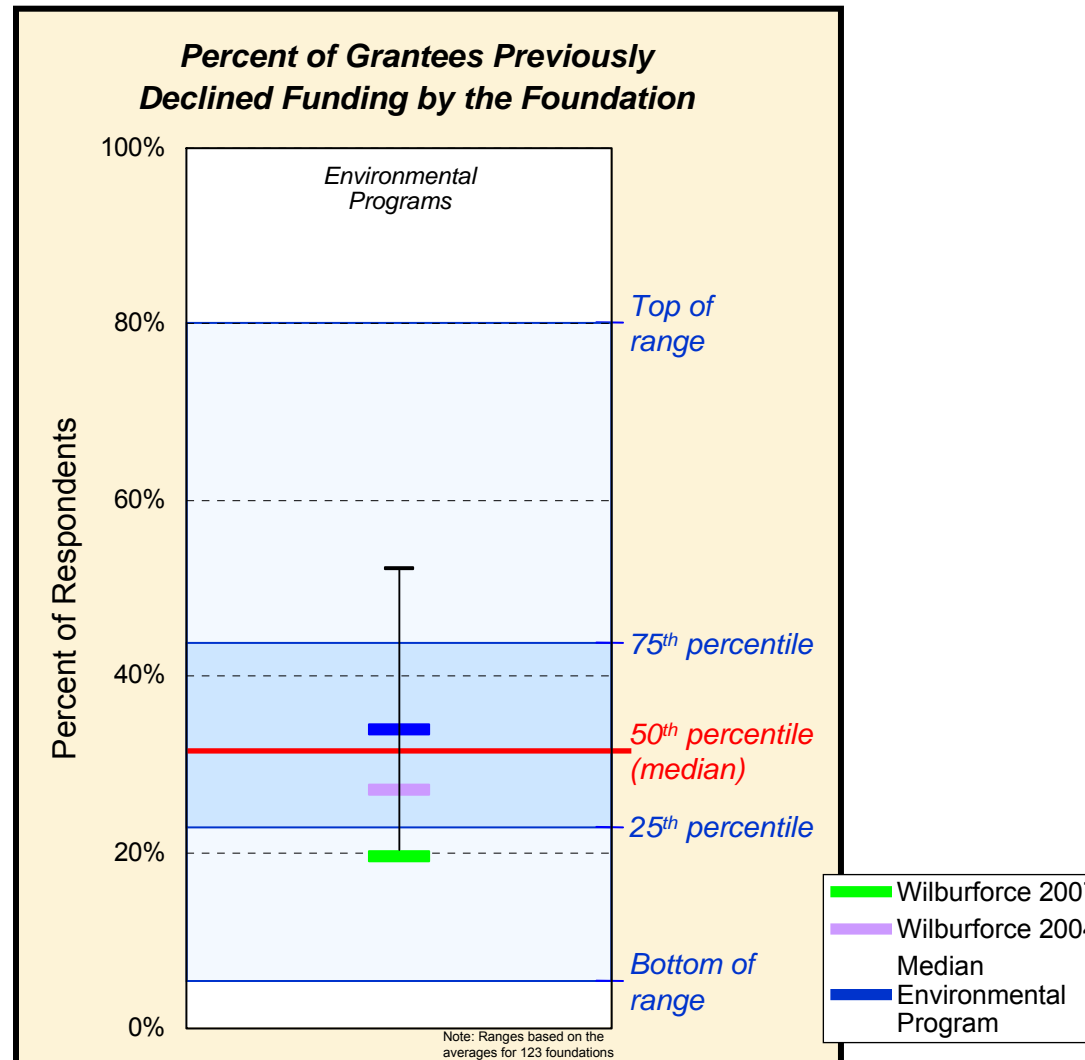
- larger than that of the median foundation
- similar to that of the median environmental program



# Grantees Previously Declined Funding

The proportion of Wilburforce grantees that had previously been declined funding from the Foundation is:

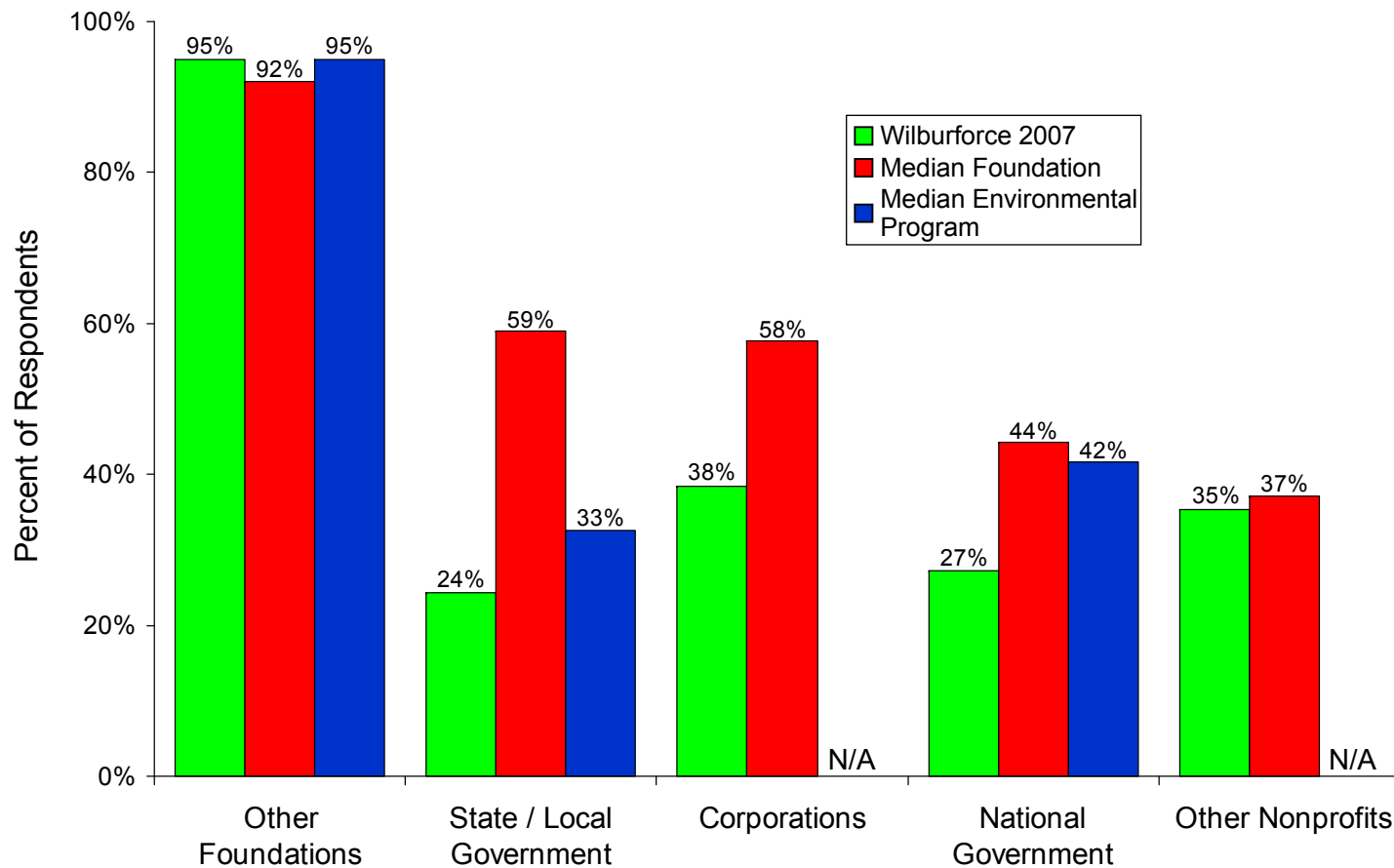
- smaller than that of the median foundation
- smaller than that of all environmental programs



# Other Sources of Grants

A smaller than typical proportion of Wilburforce grantees report receiving funding from state/local governments, corporations, and the national government.

**Other Funding Sources Providing Grants**

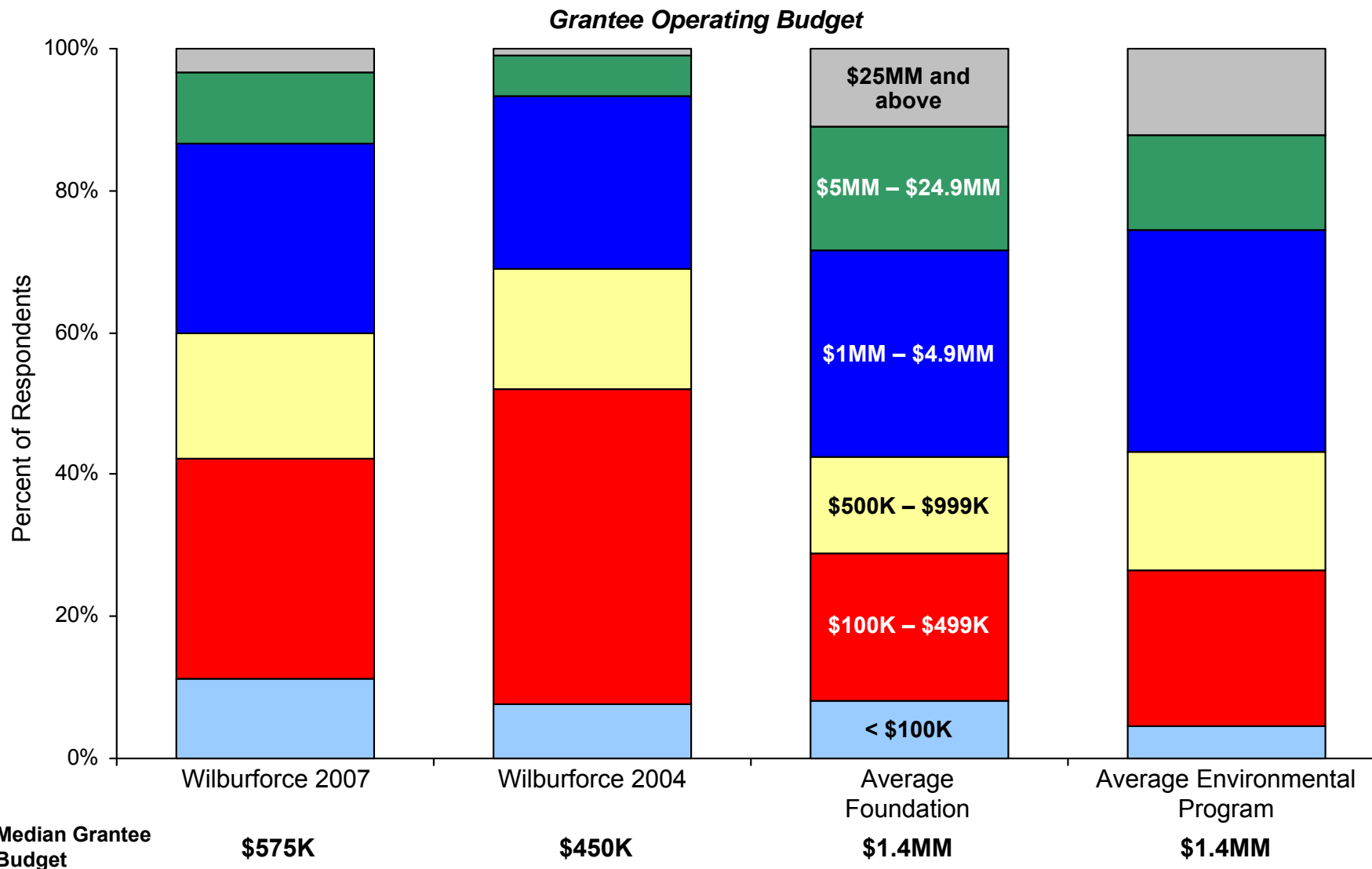


Note: This chart includes data about 98 foundations, except for the categories “corporations” and “other nonprofits,” which both include data about 16 foundations. Wilburforce 2004 data not available due to changes to the survey instrument. Environmental program data not available for the categories “corporations” and “other nonprofits” due to changes to the survey instrument.

# Grantee Operating Budget

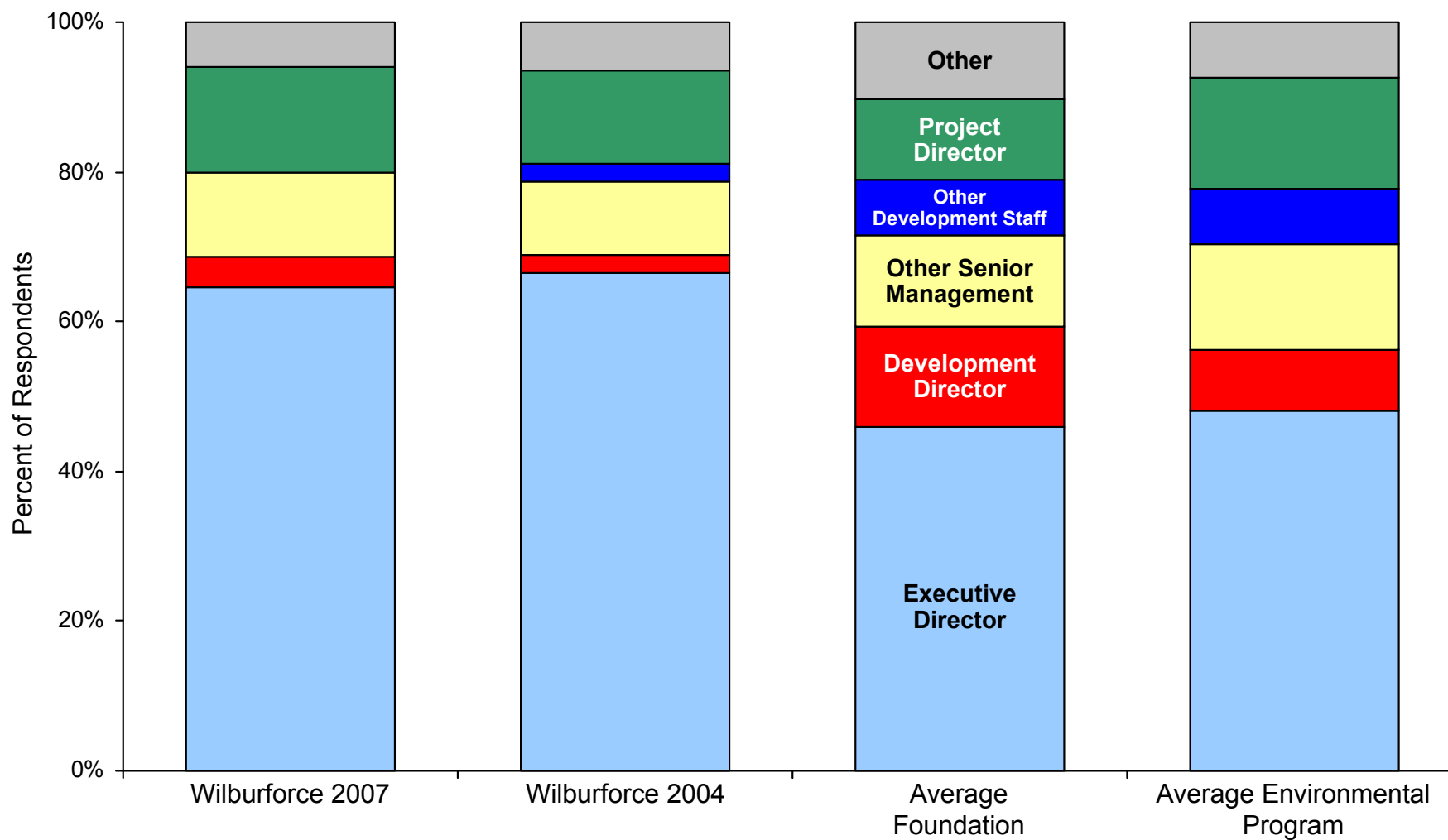
The median budget of Wilburforce grantees is:

- smaller than that of the median foundation
- smaller than that of the median foundation



# Job Title of Respondents

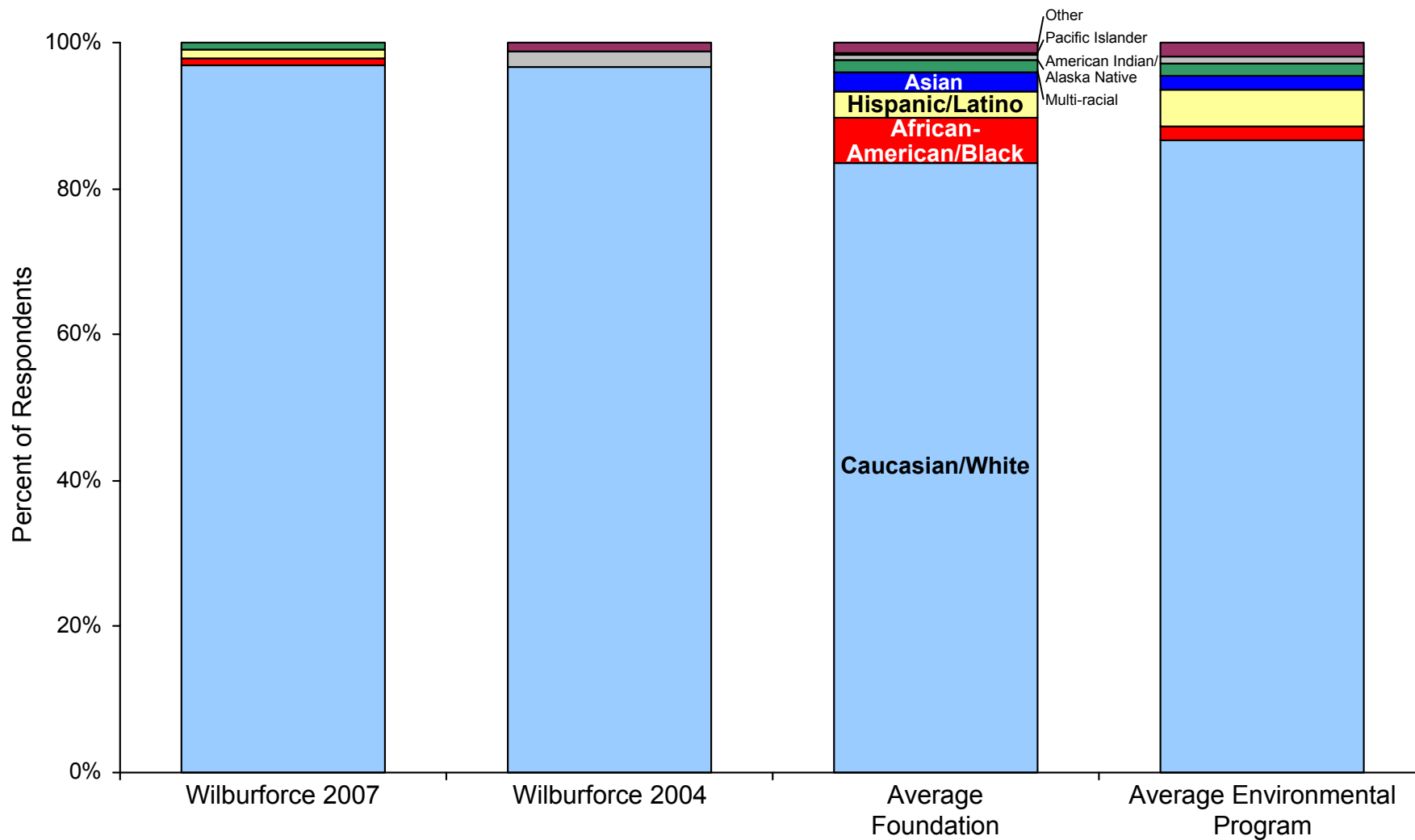
Job Title of Survey Respondents



Note: This chart includes data about 123 foundations.

# Race/Ethnicity of Respondents

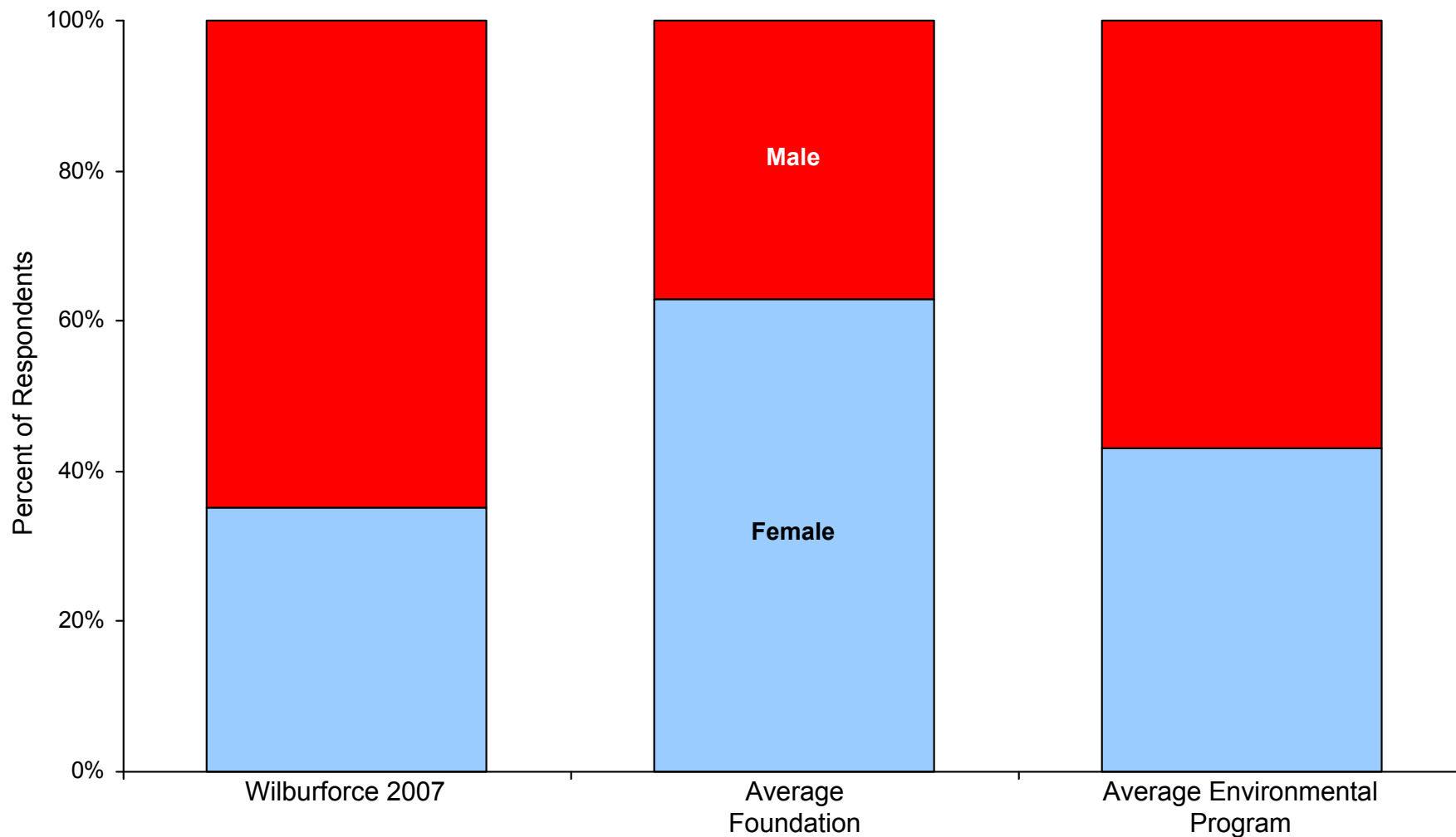
Race/Ethnicity of Survey Respondents



Note: This chart includes data about 123 foundations.

# Gender of Respondents

*Gender of Survey Respondents*



Note: This chart includes data about 98 foundations. Wilburforce 2004 data not available due to changes to the survey instrument.

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# Excerpt of Operational Benchmarking Report (OBR) Operational Benchmarking Report Excerpt

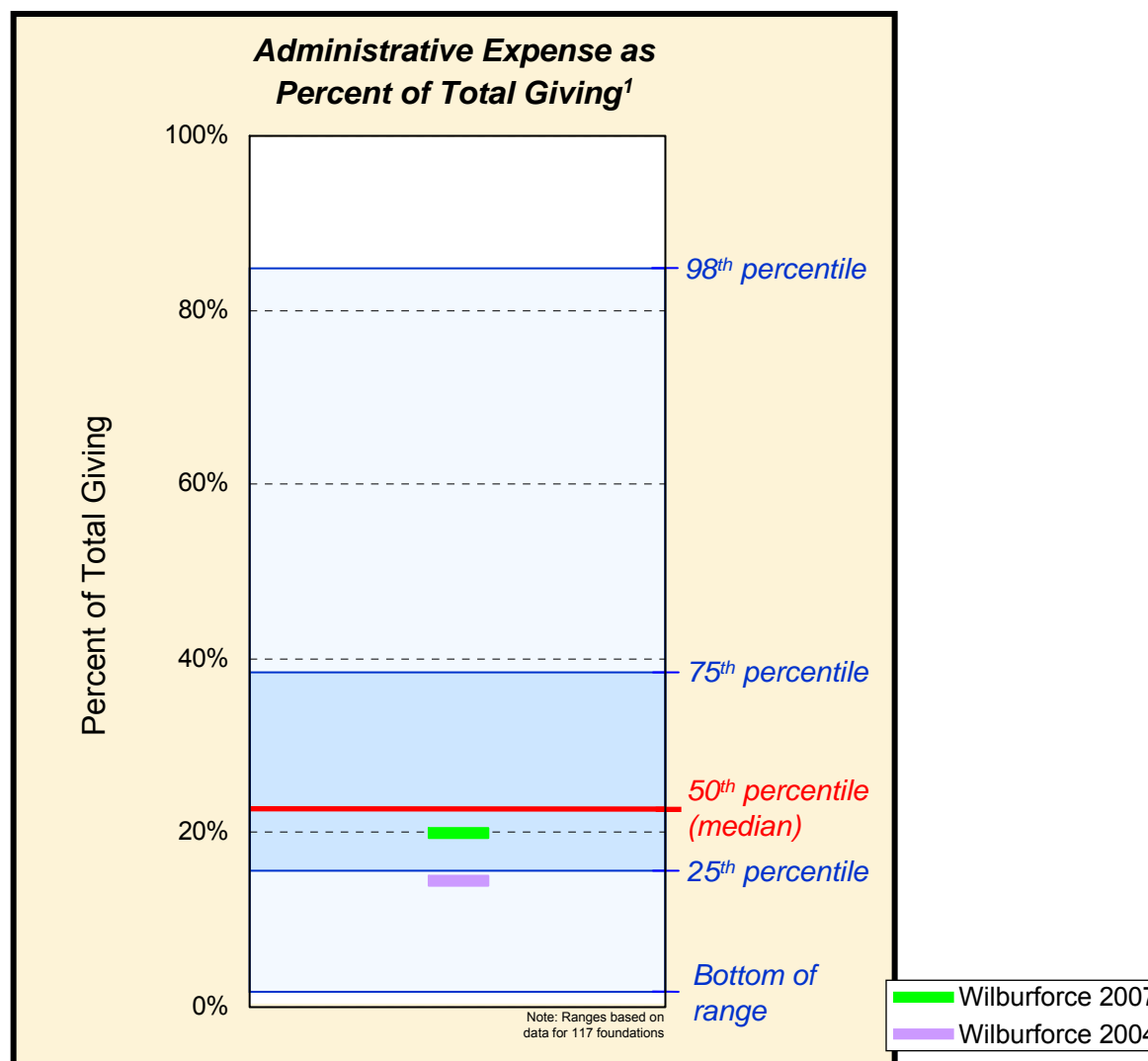


- ◆ The following section is an excerpt of CEP's Operational Benchmarking Report (OBR).
  - It contains charts based on data supplied by foundations that subscribe to the GPR and the OBR. This data is both from IRS tax filings as well as self-reported information.
- ◆ These pages are intended to provide context to the Foundation in thinking about its GPR results relative to its grantmaking and staffing.
  - Foundations of different sizes and focuses choose to structure their foundations differently – so, as with all the information contained in this report, the Foundation should interpret data in this section in light of its distinctive goals and strategy.
- ◆ Note: Environmental programs cohort not available for OBR measures because this data is not collected on a programmatic level.

# Total Administrative Expense

Wilburforce's administrative expenses as a proportion of its giving are:

- similar to that of the median foundation



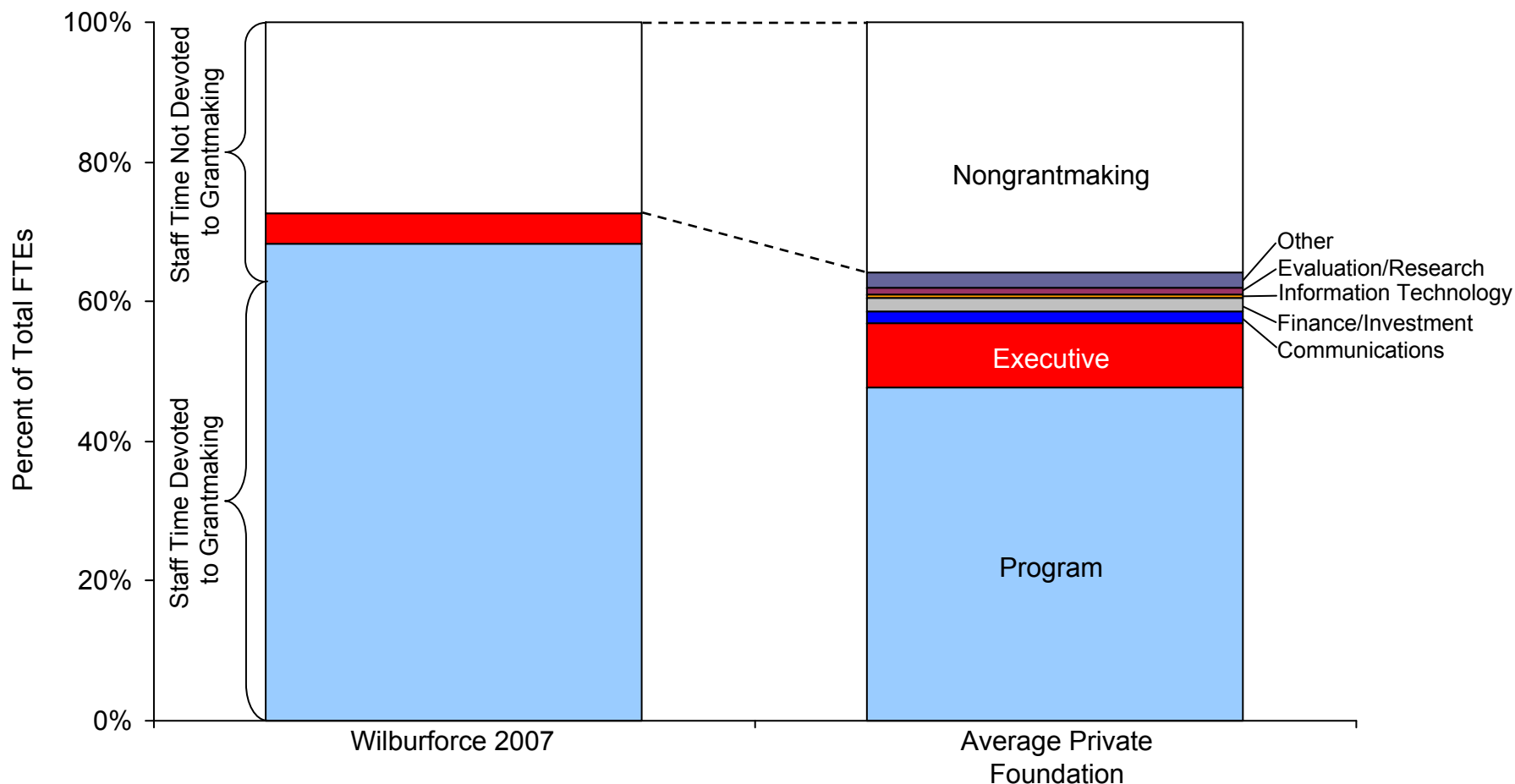
85 1: Total administrative expense is line 24a (line 44a subtracting 22a on the 990) and total giving is line 25d (22a on the 990). Two values over 100% are not shown.

# Foundation Staffing

Compared to the other foundation staffs in our sample, Wilburforce staff devote a:

- larger proportion of their time to grantmaking

**Proportion of Staff Time Spent on Grantmaking vs. Nongrantmaking Activities**



**Proportion of Staff Time Devoted to Grantmaking**

**73%**

**64%**

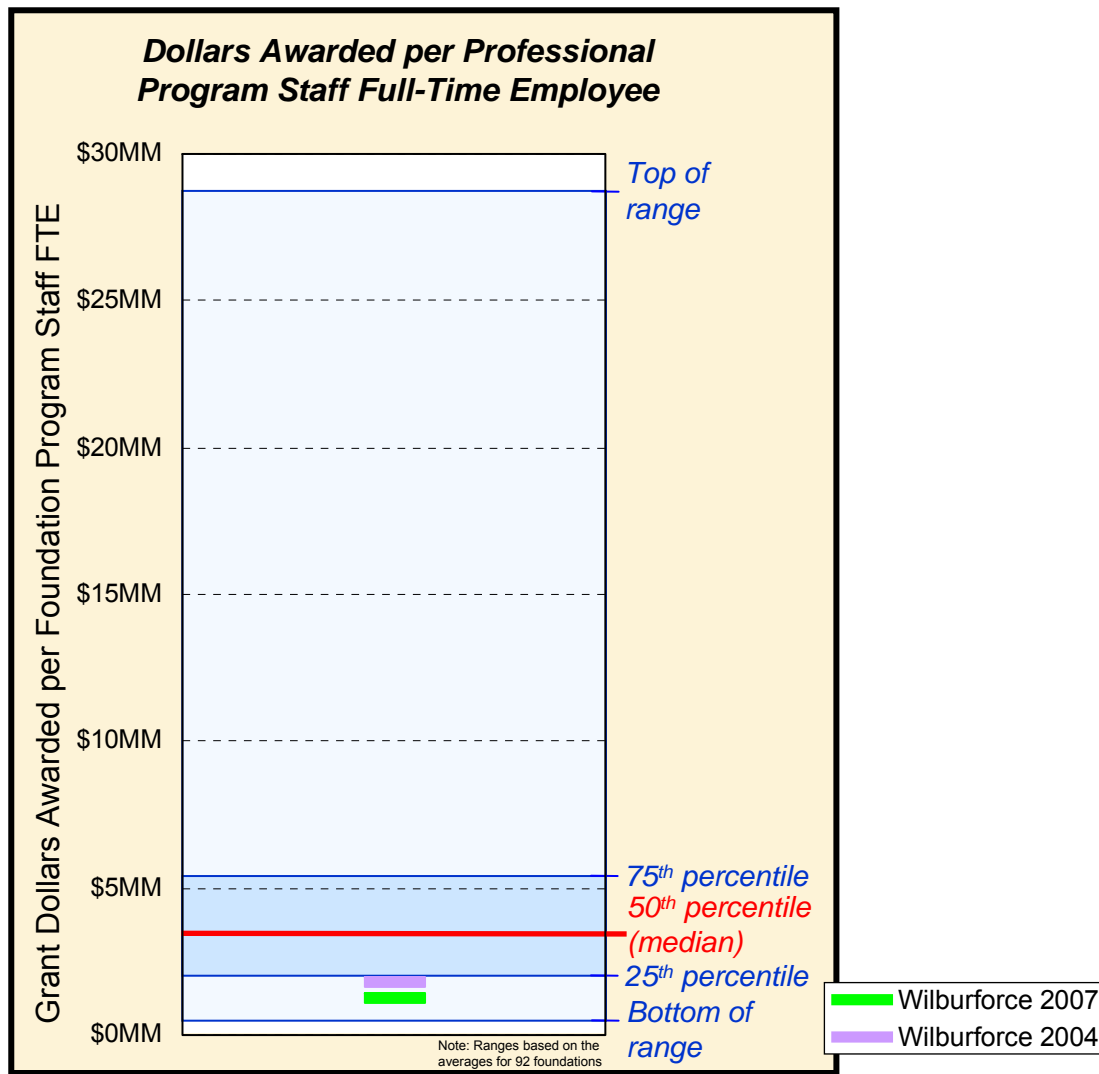
Note: Excludes FTEs devoted to the operation of foundation charitable programs. This chart includes data about 57 foundations. Wilburforce 2004 data not available due to changes in data collection.

Source: Self-reported data provided by Wilburforce and other GPR and Operational Benchmarking Report (OBR) subscribers from 2005-2007 survey rounds.

# Staff to Giving Ratio

The number of dollars awarded per professional program staff full-time employee at Wilburforce is:

- smaller than that of the median foundation



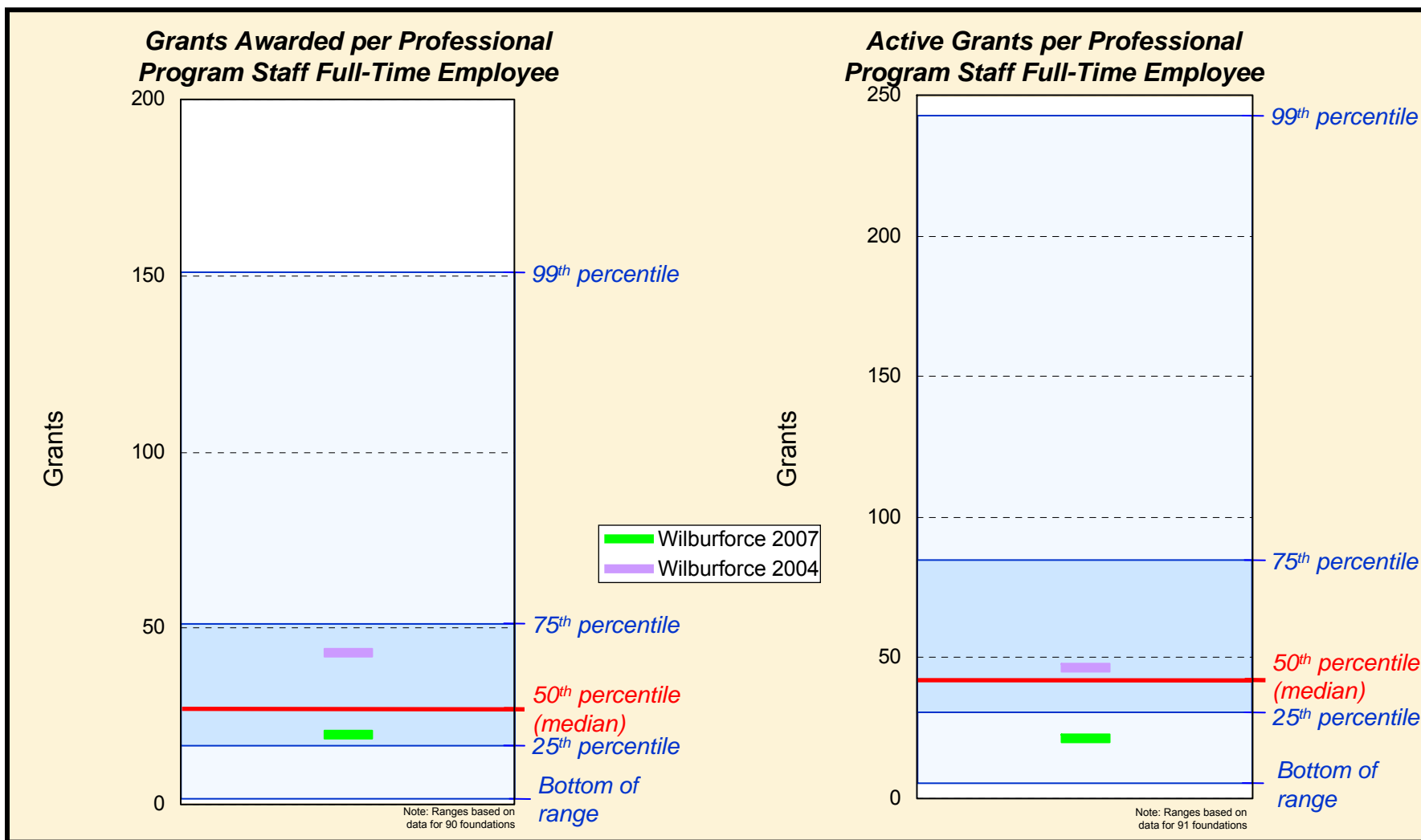
## Program Staff Load (2)

The number of grants awarded per professional program staff full-time employee at Wilburforce is:

- smaller than that of the median foundation

The number of active grants per professional program staff full-time employee at Wilburforce is:

- smaller than that of the median foundation



1: One value over 250 are not shown.

Source: Self-reported data provided by Wilburforce and other GPR and Operational Benchmarking Report (OBR) subscribers from 2005-2007 survey rounds.

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# Foundations Included in Comparative Set (1)

The 123 foundations whose grantee ratings are included in the comparative set of this Grantee Perception Report are:

- |                                                     |                                                    |
|-----------------------------------------------------|----------------------------------------------------|
| The Abell Foundation                                | Connecticut Health Foundation*                     |
| Adolph Coors Foundation                             | Conrad N. Hilton Foundation*                       |
| The Ambrose Monell Foundation                       | The David and Lucile Packard Foundation*           |
| Amelia Peabody Foundation                           | Dekko Foundation*                                  |
| Andersen Foundation                                 | Doris Duke Charitable Foundation*                  |
| Ann Arbor Area Community Foundation*                | The Duke Endowment*                                |
| The Anschutz Foundation                             | E. Rhodes & Leona B. Carpenter Foundation          |
| The Atlantic Philanthropies*                        | East Bay Community Foundation*                     |
| The Assisi Foundation of Memphis*                   | Endowment for Health*                              |
| The AVI CHAI Foundation*                            | Evelyn and Walter Haas, Jr. Fund*                  |
| Barr Foundation*                                    | The Fan Fox and Leslie R. Samuels Foundation       |
| Bill & Melinda Gates Foundation*                    | France-Merrick Foundation                          |
| Blandin Foundation*                                 | Gates Family Foundation                            |
| Blue Cross Blue Shield of Massachusetts Foundation* | Gaylord and Dorothy Donnelley Foundation*          |
| Blue Shield of California Foundation*               | General Mills Foundation*                          |
| The Boston Foundation*                              | The George Gund Foundation*                        |
| The Broad Foundation*                               | The Gill Foundation*                               |
| The California Endowment*                           | Grand Rapids Community Foundation*                 |
| The Cannon Foundation                               | Gulf Coast Community Foundation of Venice*         |
| Carrie Estelle Doheny Foundation                    | Hall Family Foundation                             |
| The Case Foundation*                                | Harold K.L. Castle Foundation                      |
| The Champlin Foundations                            | Hartford Foundation for Public Giving*             |
| Charles and Helen Schwab Foundation*                | The Harvest Foundation of the Piedmont*            |
| Charles Stewart Mott Foundation*                    | The Heinz Endowments*                              |
| The Christensen Fund*                               | Hess Foundation                                    |
| Claude Worthington Benedum Foundation*              | HRJ Consulting (for an anonymous foundation)*      |
| The Clowes Fund*                                    | The Jacob and Valeria Langeloth Foundation*        |
| The Collins Foundation                              | The James Irvine Foundation*                       |
| The Colorado Trust*                                 | Jessie Smith Noyes Foundation*                     |
| Community Memorial Foundation*                      | The John A. Hartford Foundation                    |
| Community Technology Foundation of California*      | The John D. and Catherine T. MacArthur Foundation* |

# Foundations Included in Comparative Set (2)

John P. McGovern Foundation  
The John R. Oishei Foundation\*  
The John S. and James L. Knight Foundation\*  
Kalamazoo Community Foundation\*  
Kansas Health Foundation\*  
The Kresge Foundation\*  
The Lenfest Foundation  
Levi Strauss Foundation/Levi Strauss & Co.\*  
The Louis Calder Foundation  
Lucile Packard Foundation for Children's Health\*  
Lumina Foundation for Education\*  
Maine Community Foundation\*  
Marguerite Casey Foundation\*  
The McKnight Foundation\*  
Medina Foundation\*  
MetroWest Community Health Care Foundation  
Michael Reese Health Trust\*  
The Minneapolis Foundation\*  
Missouri Foundation for Health\*  
The Nathan Cummings Foundation\*  
Nellie Mae Education Foundation\*  
The New York Community Trust\*  
New York State Health Foundation\*  
Nina Mason Pulliam Charitable Trust\*  
Nord Family Foundation\*  
Northwest Health Foundation\*  
The Overbrook Foundation  
Partnership for Excellence in Jewish Education (PEJE)\*  
The Peter and Elizabeth C. Tower Foundation\*  
PetSmart Charities\*  
The Philadelphia Foundation\*  
Polk Bros. Foundation\*  
The Ralph M. Parsons Foundation  
The Rhode Island Foundation\*  
Richard M. Fairbanks Foundation\*  
Robert Wood Johnson Foundation\*  
Robin Hood Foundation\*  
The Rockefeller Foundation\*  
Rollin M. Gerstacker Foundation  
The Russell Family Foundation\*  
Ruth Mott Foundation\*  
The Saint Paul Foundation\*  
Shelton Family Foundation  
Skoll Foundation\*  
Stuart Foundation\*  
T.L.L. Temple Foundation  
Thrivent Financial For Lutherans Foundation\*  
Vancouver Foundation\*  
The Vermont Community Foundation\*  
W.K. Kellogg Foundation\*  
Wachovia Regional Foundation\*  
The Wallace Foundation\*  
Walter & Elise Haas Fund\*  
Wellington Management Charitable Fund\*  
Wilburforce Foundation\*  
The William and Flora Hewlett Foundation\*  
The William Penn Foundation\*  
William T. Kemper Foundation  
Windgate Charitable Foundation  
Winter Park Health Foundation\*  
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:

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## 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
- **Stakeholder Assessment Report (STAR):** delivers insight about a foundation's effectiveness by surveying stakeholders who the foundation seeks to influence as part of its strategy.
- **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

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