

Grantee Perception Report®

prepared for

The John R. Oishei Foundation

June 2010

Excerpt Report



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EFFECTIVE PHILANTHROPY

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Executive Summary

Compared to other funders whose grantees CEP has surveyed, The John R. Oishei Foundation (“Oishei”) receives high ratings from its grantees on many dimensions in this report. Measures on which the Foundation receives higher than typical ratings include the Foundation’s impact on grantees’ fields, communities, and organizations, the Foundation’s understanding of grantees’ communities and organizations, and overall grantee satisfaction. The Foundation has improved significantly on its 2005 GPR results on several measures, including impact on and understanding of grantees’ fields, understanding of grantees’ organizations, and helpfulness of the selection process.. Grantees comment that the Foundation “operates with the highest integrity and commitment of purpose,” but indicate some areas for potential improvement, especially on issues of level of interaction.

Although grantees provide higher ratings than typical regarding the quality of their interactions with the Foundation, grantees report less frequent interactions than in 2005. Grantees view the Foundation as more responsive, fair, and approachable than typical. However, grantees who interact with the Foundation at least once every few months rate significantly higher throughout the report, including on overall satisfaction and on items related to the quality of interactions – fairness, responsiveness, and approachability. The largest proportion of grantee suggestions for the Foundation concerns interactions, the majority of which relate to the frequency of interactions. Additionally, several grantees specifically mention site visits as an opportunity for the Foundation in order to “learn about the organization and the community.” Grantees that report that they received site visits rate higher on many key measures in the report, including impact on grantees’ organizations and consistency of the Foundation’s communications resources.

Oishei grantees rate the Foundation higher than typical with regard to the consistency of its communications resources. Despite these high ratings, grantees find that the Foundation is less clear than typical in communicating its goals and strategies, and report occasional “dark periods” and “general miscommunication[s]”. When asked about the Foundation’s response to the current economic climate, however, grantees indicate that these communications were more clear than typical and that the Foundation’s response was more helpful to them than typical.

Although Oishei grantees report participating in a highly-involved selection process that is very helpful in strengthening their projects and organizations, grantees report a lower level of Foundation involvement during the reporting/evaluation process. The Foundation is more involved than approximately 75 percent of funders in the development of grantees’ proposals. Although Foundation involvement in grantee proposal development has increased, grantees report that Foundation involvement in many aspects of the reporting/evaluation process has decreased. The proportion of Foundation grantees who report discussing their completed reports or evaluations is lower than typical and lower than in 2005. Grantees that did participate in this activity find the evaluation process significantly more helpful than grantees that did not.

Methodology – The Foundation’s Grantee Survey

- ♦ The Center for Effective Philanthropy (CEP) surveyed the grantees of The John R. Oishei Foundation (“Oishei”) during February and March 2010. CEP has surveyed Oishei’s grantees in the past. Where possible, ratings from these surveys are also shown in the report. The details of Oishei’s surveys are as follows:

Survey	Survey Period	Fiscal Year of Surveyed Grantees	Number of Grantees Surveyed	Number of Responses Received	Survey Response Rate ¹
Oishei 2010	February and March 2010	2008-2009	135	97	72%
Oishei 2005	September and October 2005	2004	67	52	78%

- ♦ Selected grantee comments are also 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 a wide range of perspectives.

¹: The median response rate for individual funders over the last six years of surveys is 68 percent.

Methodology – Comparative Data

- ◆ Oishei’s average and/or median grantee ratings are compared to the average and/or median ratings from grantees in CEP’s dataset, which contains data collected over the last six years. Please see Appendix B for a list of all funders whose grantees CEP has surveyed.

Full Comparative Set	
Grantee Responses	36,864 grantees
Philanthropic Funders	251 funders

- ◆ Oishei is also compared to a smaller cohort of 18 funders, as selected by the Foundation. The 18 funders that comprise this group are:

Cohort Funders	
Blandin Foundation	Rasmuson Foundation
Bradley-Turner Foundation	Shelton Family Foundation
Claude Worthington Benedum Foundation	The Champlin Foundations
Dyson Foundation	The Clark Foundation
El Pomar Foundation	The John R. Oishei Foundation
J. A. & Kathryn Albertson Foundation	The Ford Family Foundation
James Graham Brown Foundation, Inc.	The GAR Foundation
Kronkosky Charitable Foundation	The William K. Warren Foundation
Meyer Memorial Trust	Victoria Foundation, Inc.

Grantmaking Characteristics

- ♦ This table is intended to provide context to the Foundation in thinking about its GPR results relative to its grantmaking practices. The information is based on self-reported data from grantees about the size, duration, and types of grants that they received.
- ♦ Compared to the typical funder, Oishei awards larger grants. These grants are smaller than in 2005 and are less likely than in 2005 to be multi-year grants.

Survey Item	Oishei 2010	Oishei 2005	Full Dataset Median	Cohort Funder Median
Grant Size				
Median grant size	\$100K	\$200K	\$60K	\$50K
Grant Length				
Average grant length	2.0 years	2.6 years	2.1 years	1.9 years
Percent of grantees receiving multi-year grants	47%	82%	49%	40%
Type of Support¹				
Percent of grantees receiving operating support	20%	6%	19%	N/A
Percent of grantees receiving program/project support	57%	78%	65%	N/A
Percent of grantees receiving other types of support	24%	16%	16%	N/A

Note: CEP research indicates that grant size, type, or length alone are not key predictors of impact on grantee's organizations. For the full range of data on these survey items refer to part B of the Appendix.

1. Cohort funder data on type of support not available due to changes to the survey instrument.

Structural Characteristics of Grantees

- ♦ This table is intended to provide context to the Foundation in thinking about its GPR results relative to the structural characteristics of its grantees. The information is based on self-reported data from grantees about the characteristics of their organizations.
- ♦ Compared to grantees of the typical funder, Oishei grantees are smaller, more established organizations that are less likely to be first-time grant recipients of the Foundation.

Survey Item	Oishei 2010	Oishei 2005	Full Dataset Median	Cohort Funder Median
Budget of Funded Organizations				
Typical organizational budget	\$1.0MM	\$1.0MM	\$1.4MM	\$1.0MM
Duration of Funded Program and Grantee Organization²				
Programs conducted 6 years or more ¹	37%	N/A	33%	N/A
Median length of establishment of grantee organizations	30 years	29 years	24 years	N/A
First-Time Grantees^{2,3}				
Percentage of first-time grants	22%	N/A	34%	N/A

1: Represents data from 87 funders.

2: Oishei 2005 and cohort funder data on duration of funded program, length of establishment of grantee organization, and percentage of first-time grants not available due to changes to the survey instrument.

3: Represents data from 16 funders.

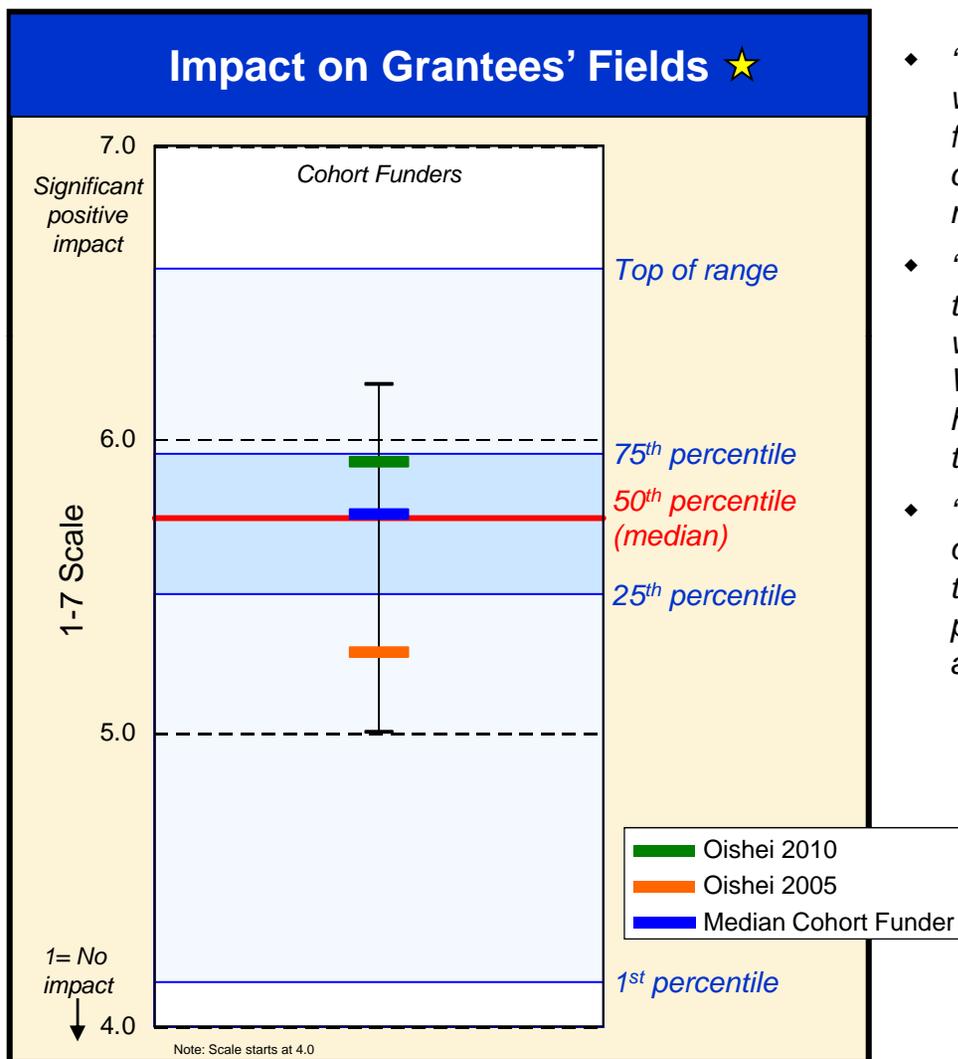
Note: In most cases, the structural characteristics of grantees are not strong predictors of how grantees perceive funders, suggesting that it is possible for funders with even a unique set of grantees to attain high ratings. For additional information on grantee characteristics related to these survey items refer to part B of the Appendix.

Impact on Grantees' Fields

On impact on grantees' fields, Oishei is rated:

- above the median funder
- above the median cohort funder

Selected Grantee Comments



- ◆ “The most important impact on the field is insisting, whenever possible, that non-profits collaborate, merge funding streams, maintain high quality standards, have clear performance goals and independent evaluations to measure outcomes.”
- ◆ “If you look at a break down of their financial support over the last few years – cultural [organizations] have done well...where human service/youth have struggled greatly. We are becoming a community great for visitors...but horrible for the residents. We are the 3rd poorest city in the country.”
- ◆ “They demand synergy between sectors and within organizations to develop strategies that work to improve the overall lives of low income people (in my field perspective) rather than fund isolated projects that band-aid or make people comfortable in poverty.”

Note: This question includes a “don’t know” response option; 6 percent of Oishei 2010 respondents answered “don’t know”, compared to 9 percent at the median funder, 15 percent of Oishei 2005 respondents, and 12 percent of respondents at the median cohort funder. Chart does not show data from one funder whose field impact rating is less than 4.0.

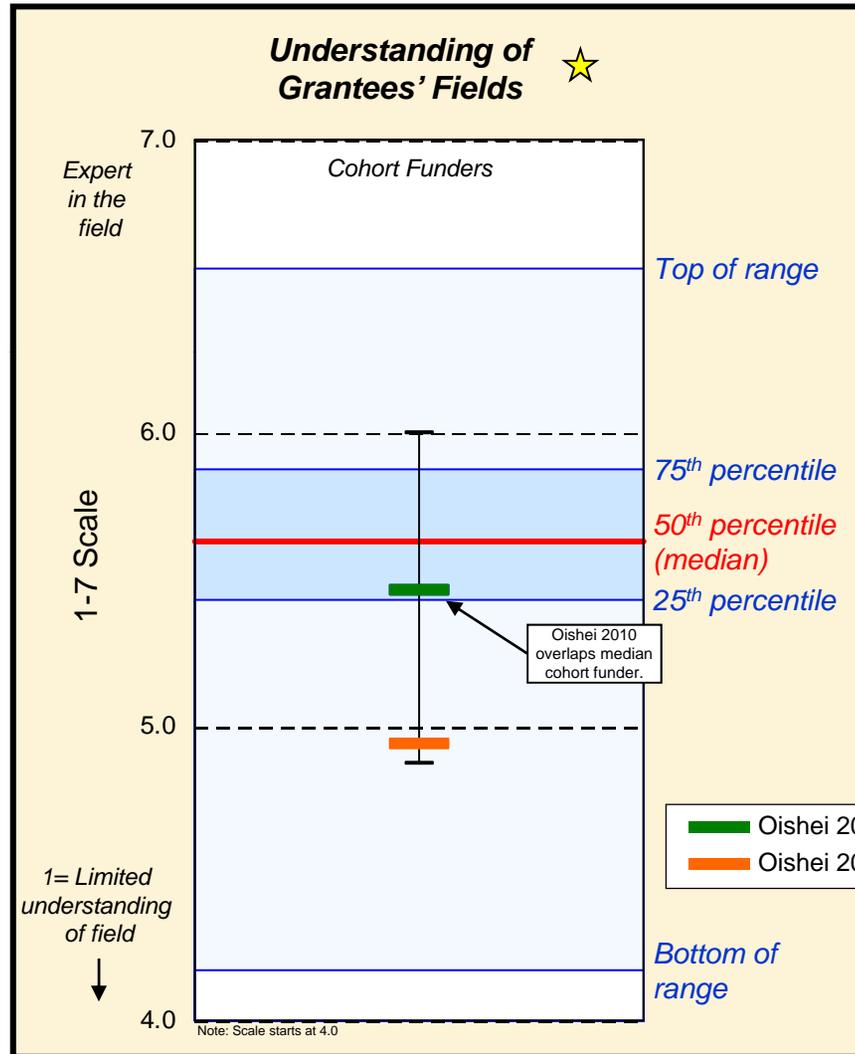
★ = Oishei 2010 rating is significantly higher than Oishei 2005 rating at a 90% confidence level.

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Understanding of Grantees' Fields

On understanding of grantees' fields, Oishei is rated:

- below the median funder
- similarly to the median cohort funder



Note: This question includes a "don't know" response option; 11 percent of Oishei 2010 respondents answered "don't know", compared to 7 percent at the median funder, 4 percent of Oishei 2005 respondents, and 11 percent of respondents at the median cohort funder.

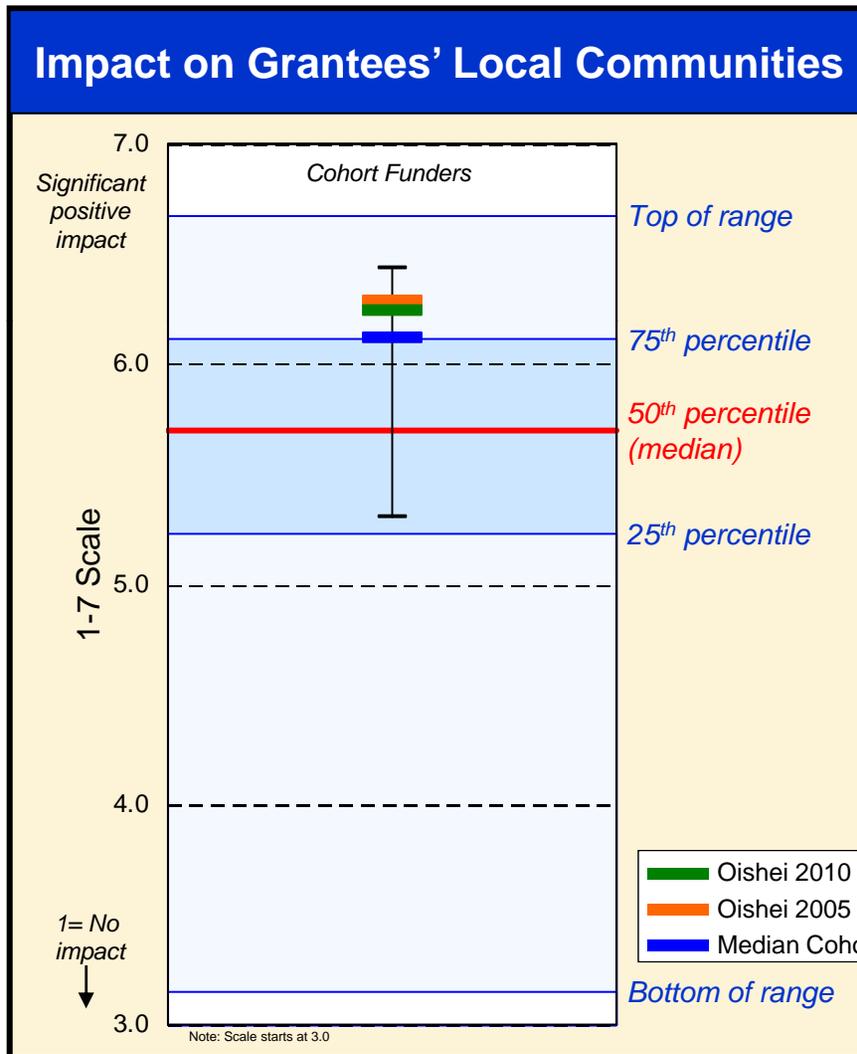
★ = Oishei 2010 rating is significantly higher than Oishei 2005 rating at a 90% confidence level.

Impact on Grantees' Local Communities

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

- above the median funder
- above the median cohort funder

Selected Grantee Comments



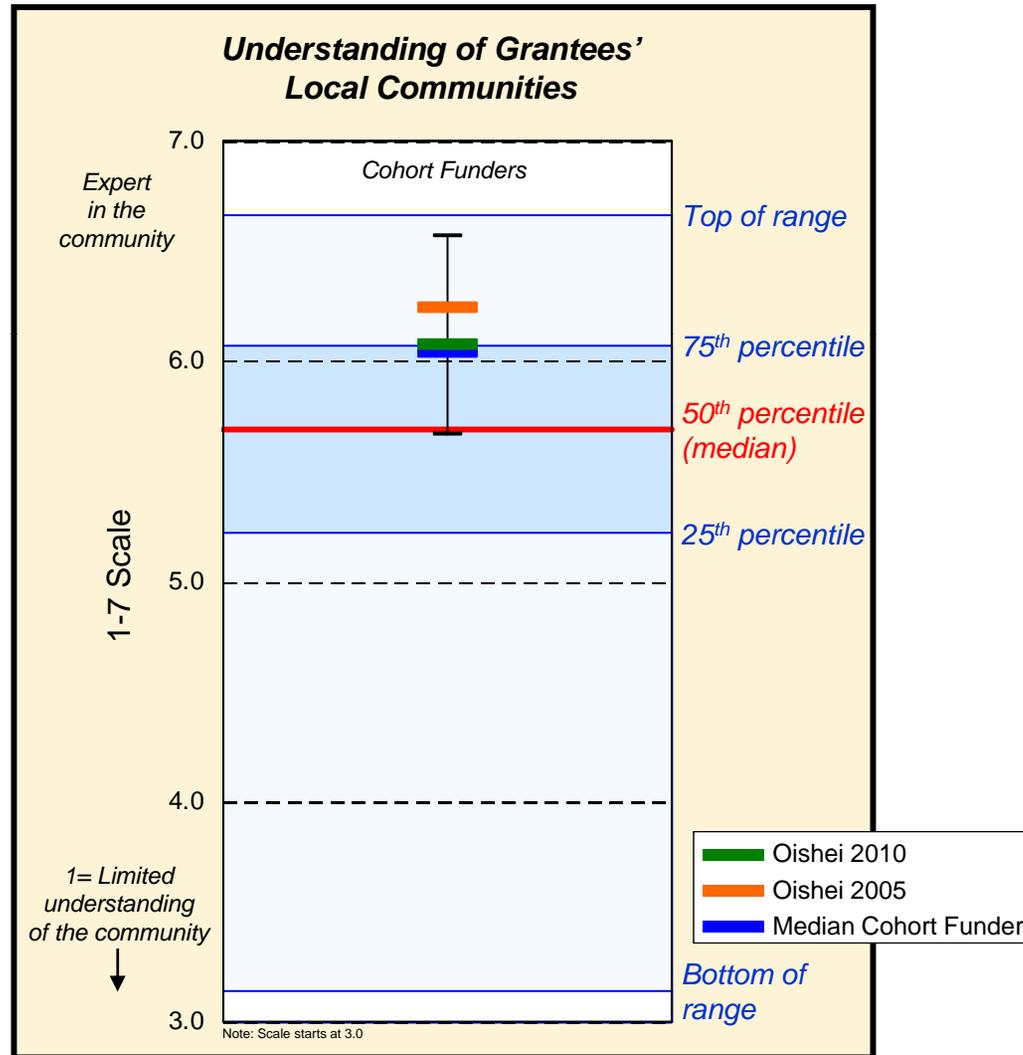
- ♦ *“The Foundation is the largest grant-maker in WNY and, therefore, has the greatest capacity to support and promote innovative programs in a variety of different areas important to the local community. Because of the Oishei Foundation’s reach and mission, the Foundation has the ability to convene organizational leaders and improve its understanding of this area’s greatest needs.”*
- ♦ *“The Oishei Foundation is a leader in the nonprofit cultural community. They have supported many initiatives to improve and market our cultural assets.”*
- ♦ *“The Foundation has been influential in shaping our region’s recovery and redevelopment...by supporting initiatives that could not otherwise have been implemented; and...by encouraging and facilitating collaborations, especially cross-sector collaborations, among funders and providers that are advancing medical research, improving the delivery of human services, and strengthening community cultural resources.”*

Note: This question includes a “don’t know” response option; 5 percent of Oishei 2010 respondents answered “don’t know”, compared to 11 percent at the median funder, 0 percent of Oishei 2005 respondents, and 6 percent of respondents at the median cohort funder.

Understanding of Grantees' Local Communities

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

- above the median funder
- similarly to the median cohort funder

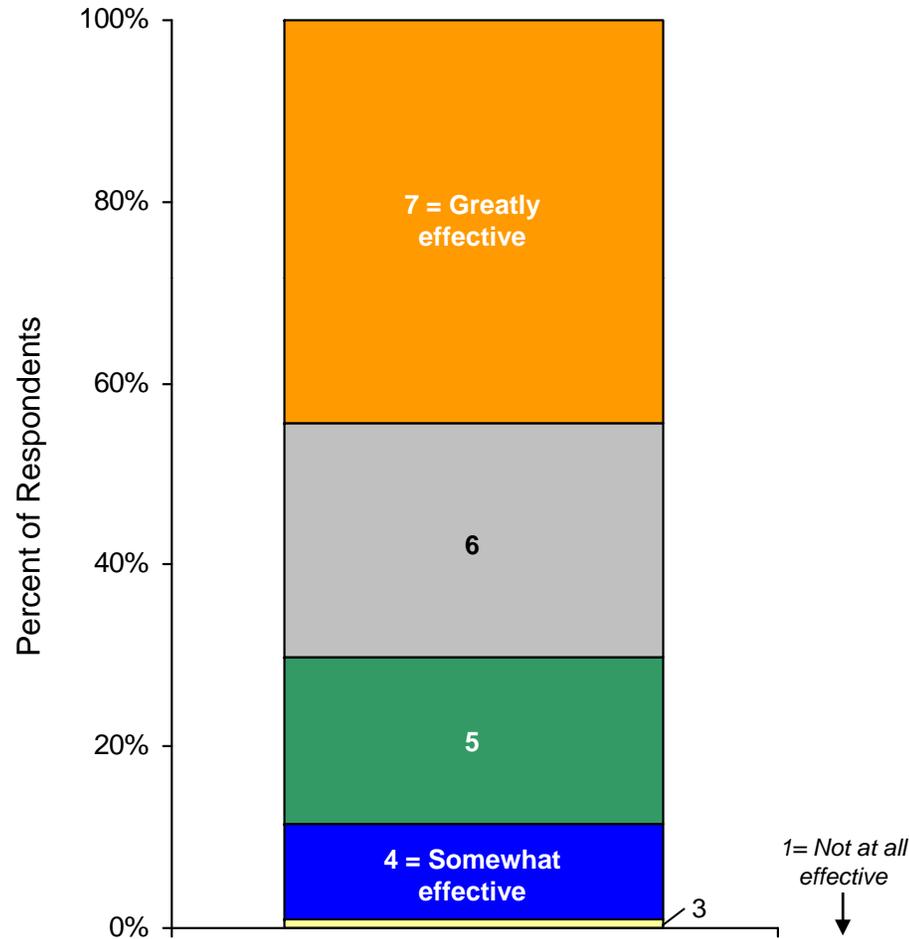


Note: This question includes a "don't know/not applicable" response option; 3 percent of Oishei 2010 respondents answered "don't know/not applicable", compared to 13 percent at the median funder, 2 percent of Oishei 2005 respondents, and 9 percent of respondents at the median cohort funder.

Effectiveness of Leading Change

Oishei grantees were asked to rate the extent to which the Foundation has been effective in leading change in the community, with 1 = "Not at all effective" and 7 = "Greatly effective." Forty-four percent of grantees indicate that the Foundation has been greatly effective, and grantees provide an average rating of 6.0.

Extent to which the Foundation has been Effective in Leading Change in the Community



Oishei Average Rating 6.0

Percent of Respondents that Answered "Don't know" 9%

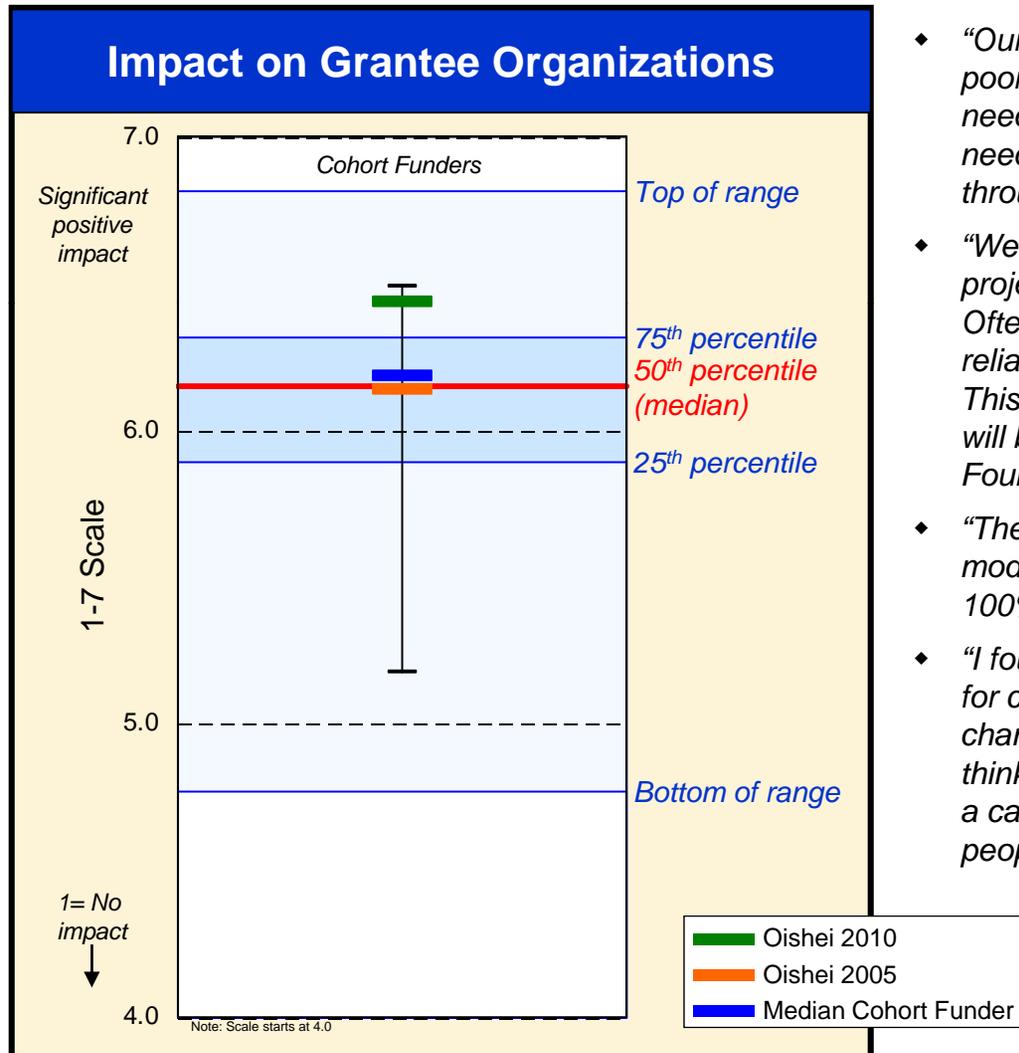
Note: No comparative data is available because the question was only asked of Oishei grantees.

Impact on Grantee Organizations

On impact on grantee organizations, Oishei is rated:

- above the median funder
- above the median cohort funder

Selected Grantee Comments

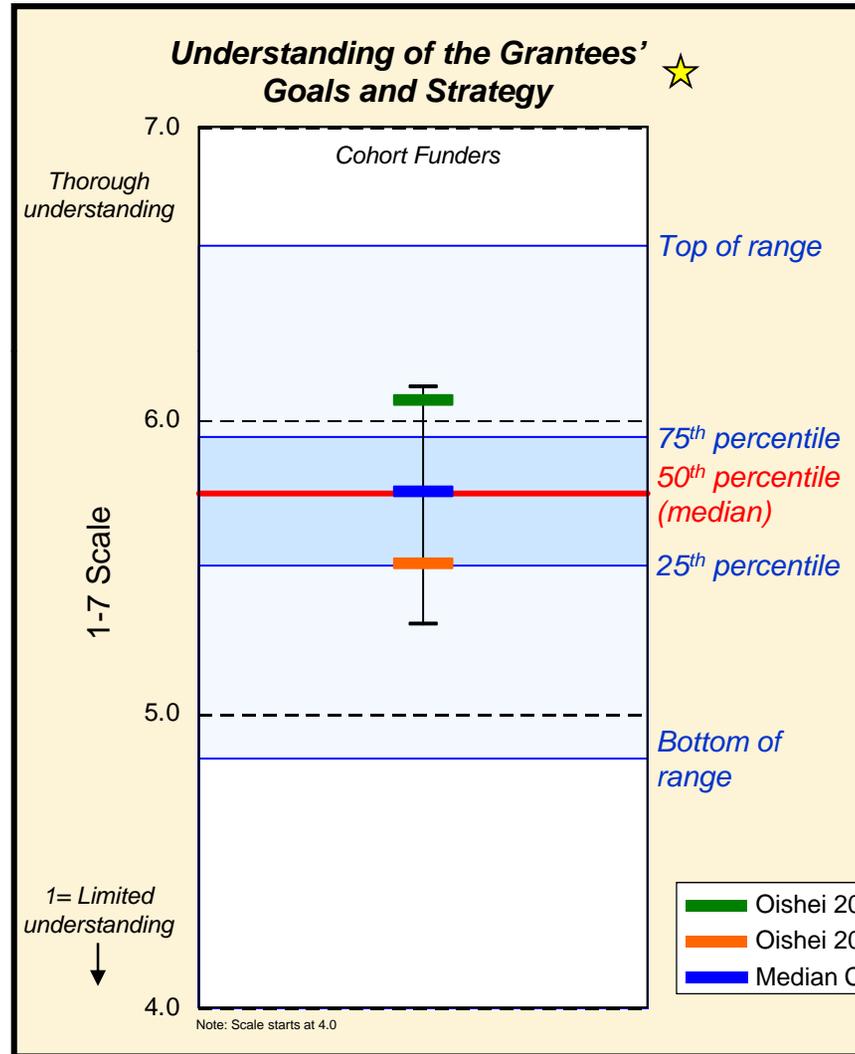


- ♦ “Our grant allows us to provide essential services to the poor and homeless such as food, shelter, and other basic needs. Without the grant, we were forced to turn away needy people, but now are able to serve the most needy throughout the grant cycle with fewer gaps.”
- ♦ “We have found that they do not fully understand the project, how it will operate, and what goals are feasible.... Often times, there is a knee jerk and often superficial reliance on ‘collaboration’ as a cure-all to every proposal. This is unrealistic. The end result for us on this program will be very positive, but we do not feel that the Foundation input contributed significantly to that success.”
- ♦ “The Foundation’s willingness to help us try out different modalities [without] penalizing us when some are not 100% successful has been extremely supportive.”
- ♦ “I found that the Foundation clearly wants to be a catalyst for change and believes in working with you to help make change. The changes don’t always originate from their thinking, but they recognize they play a great role in being a catalyst, whether funding projects or bringing ideas and people together.”

Understanding of Grantees' Goals and Strategy

On understanding of grantees' goals and strategy, Oishei is rated:

- higher than ninety percent of funders
- above the median cohort funder



Note: This question includes a "don't know" response option; 10 percent of Oishei 2010 respondents answered "don't know", compared to 7 percent at the median funder, 4 percent of Oishei 2005 respondents, and 11 percent of respondents at the median cohort funder.

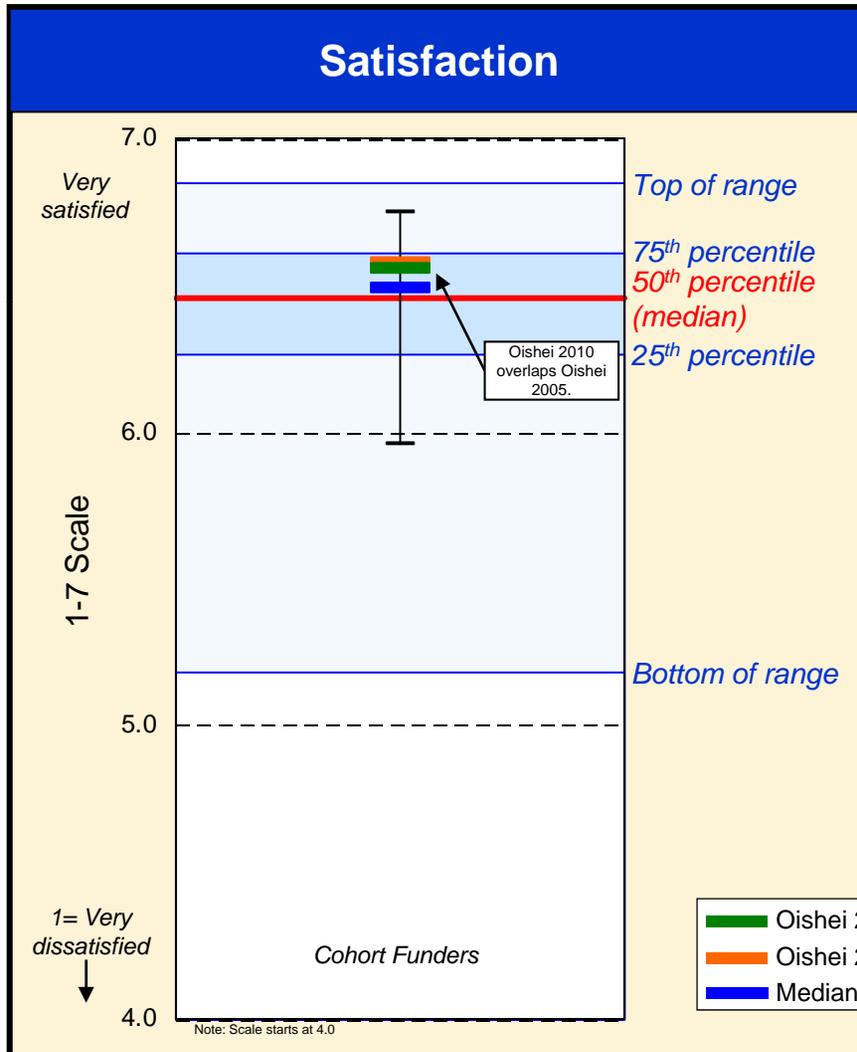
★ = Oishei 2010 rating is significantly higher than Oishei 2005 rating at a 90% confidence level.

Satisfaction

On overall satisfaction, Oishei is rated:

- above the median funder
- above the median cohort funder

Selected Grantee Comments



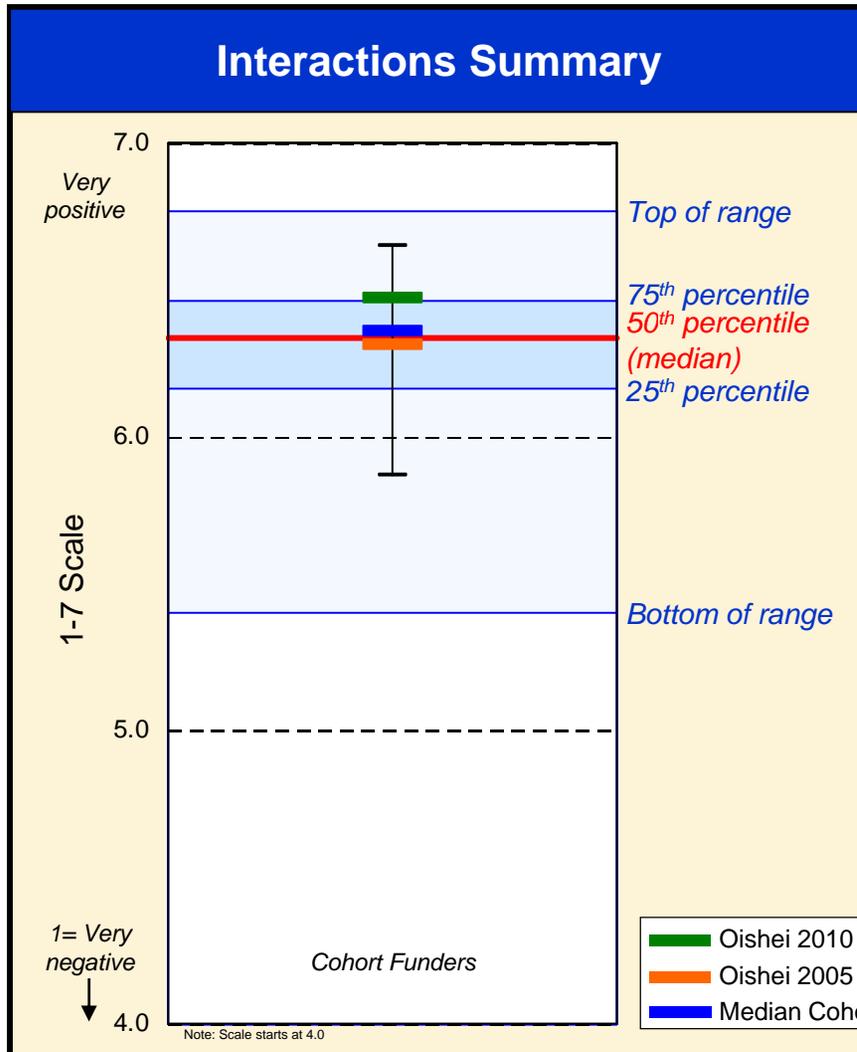
- ◆ “Over the years we have received Oishei funding, we have come to know each other well.... I would describe our relationship with the Oishei Foundation and the quality of service we experience from them as excellent.”
- ◆ “I have always felt entirely supported by the staff of the Foundation. The relationship from the beginning and throughout has always been one of partnership and mutual respect. I am extremely grateful for the relationship and it is one that I wish all foundations would emulate.”
- ◆ “I have been extremely happy with my interaction with everyone on staff and the Board members I met. The staff cares and really gets it! I feel I have a partner not just a funder.”
- ◆ “The Foundation is well-run, organized and a great service to the community. The staff is great and just affirming and encouraging to our agency. The Foundation is an example for other foundations because of its wholehearted concern and support to agencies.”

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, Oishei is rated:

- above the median funder
- above the median cohort funder

Selected Grantee Comments



- ♦ *“We appreciated the Foundation’s willingness to establish a relationship with our organization, and engage in a dialogue. This was very helpful in communicating what they could do to help with our project’s success.”*
- ♦ *“I worked very closely with the Foundation’s staff. I found them to be very interactive and responsive to questions and concerns. They were strong listeners and through the process they changed their disbursement of the funds to better reflect our cash flow needs.”*
- ♦ *“I feel that the Foundation needs more program staff to alleviate what appears to be very overworked, overburdened current staff. Quite honestly, the Oishei funding to our program is so essential and important to the success and future of our organization, that to have staff unable to meet, forgetting vital information and some general miscommunication issues is very challenging. I’m sure more to them than even our program.”*
- ♦ *“They are professional, but work with a passion, commitment and capability that makes you want to do right by them. They are a true partner....They’ve been a pleasure to work with.”*

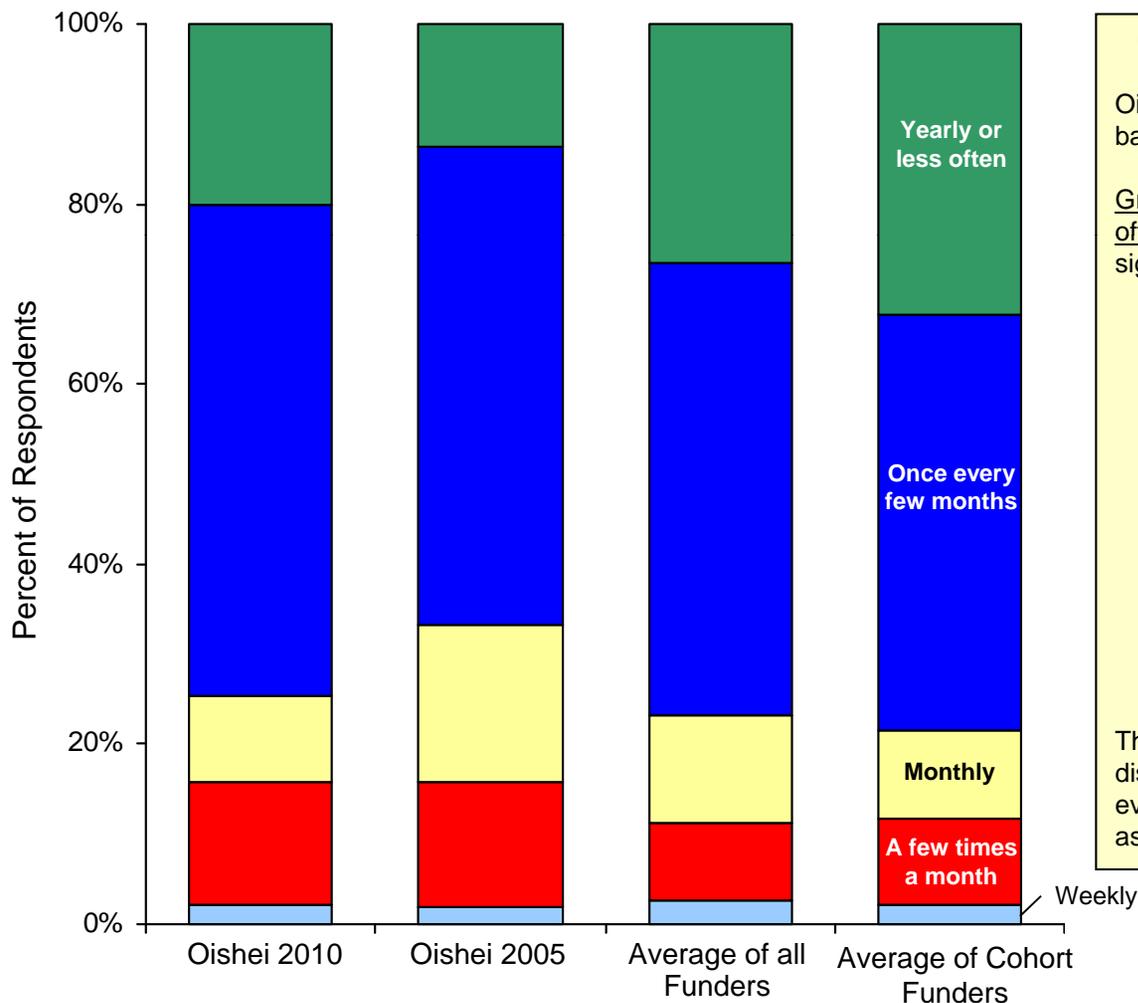
Note: Index created by averaging grantee ratings of comfort approaching the Foundation if a problem arises, responsiveness of the Foundation staff, and fairness of the Foundation's treatment of grantees – ratings that are highly correlated.

Frequency of Interactions

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

- similar to that of the average funder
- larger than that of the average cohort funder

Frequency of Grantee Contact with Program Officer During Grant



Oishei Analysis – Variation by Frequency of Interactions

Oishei grantees rate the Foundation differently based on the frequency of their interactions.

Grantees who have contact with their program officer yearly or less often rate the Foundation significantly lower on:

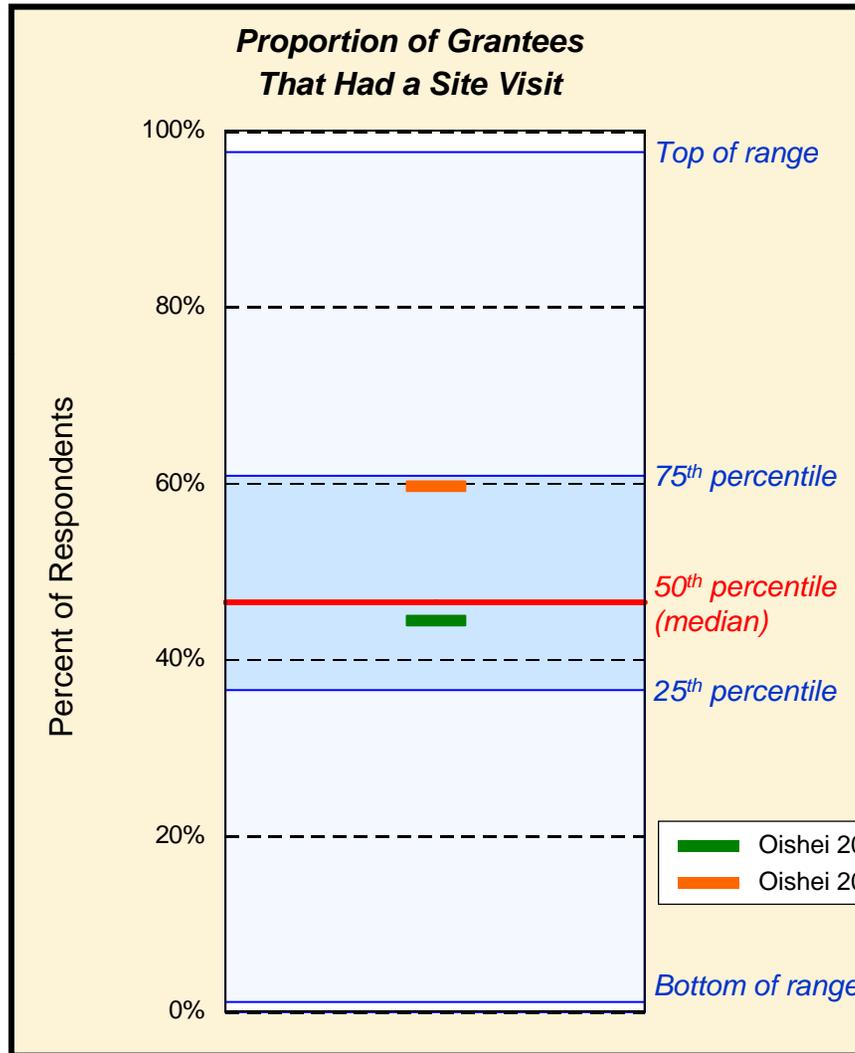
- ♦ Impact on grantees’ organizations
- ♦ Understanding of grantees’ local communities
- ♦ Overall satisfaction
- ♦ Quality of interactions with the Foundation
- ♦ Clarity of Foundation’s communication of its goals and strategies
- ♦ Level of Foundation involvement in the development of the grant proposal
- ♦ Impact of Foundation’s reputation in securing funding from other sources

These grantees were also less likely to have discussed their evaluations with the Foundation or evaluator and less likely to have received assistance securing funding from other sources.

Proportion of Grantees That Had a Site Visit

The proportion of Oishei grantees receiving a site visit is:

- similar to that of the median funder



Oishei Analysis – Variation by Site Visit

Oishei grantees rate the Foundation differently based on whether or not they received a site visit during the selection or reporting/evaluation processes, or at any other point during the life of the grant.

Grantees who received a site visit rate the Foundation significantly higher on:

- ♦ Impact on of grantees' organizations
- ♦ Extent to which Foundation has advanced knowledge in grantees' fields
- ♦ Responsiveness and approachability of Foundation staff
- ♦ Clarity and consistency of foundation communication

These grantees were also more likely to have discussed their evaluations with the Foundation or an evaluator.

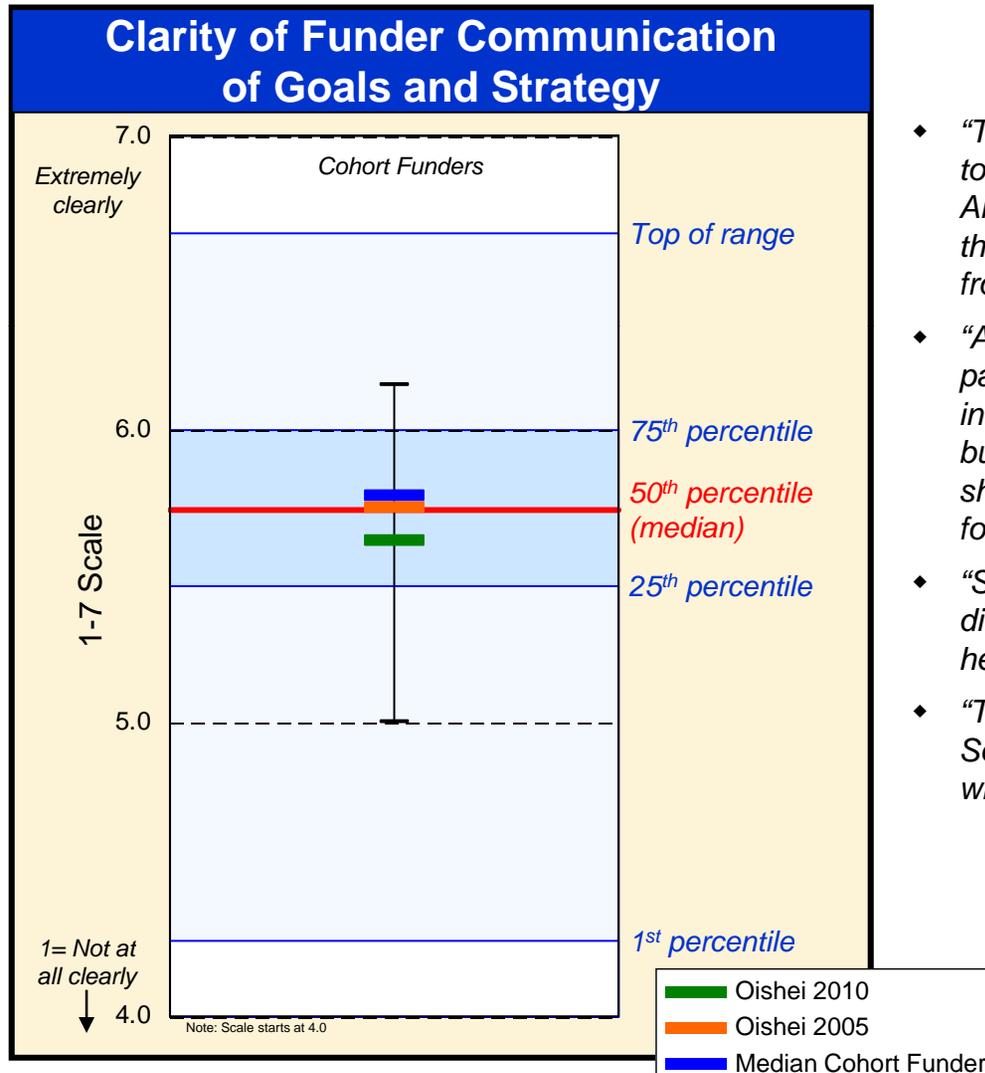
Note: Chart created by aggregating data about site visits that occurred during the selection, reporting and evaluation processes, and during the course of the grant.

Note: Cohort funder data not available due to changes to the survey instrument.

Communication of Goals and Strategy

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

- lower than the median funder
- lower than the median cohort funder



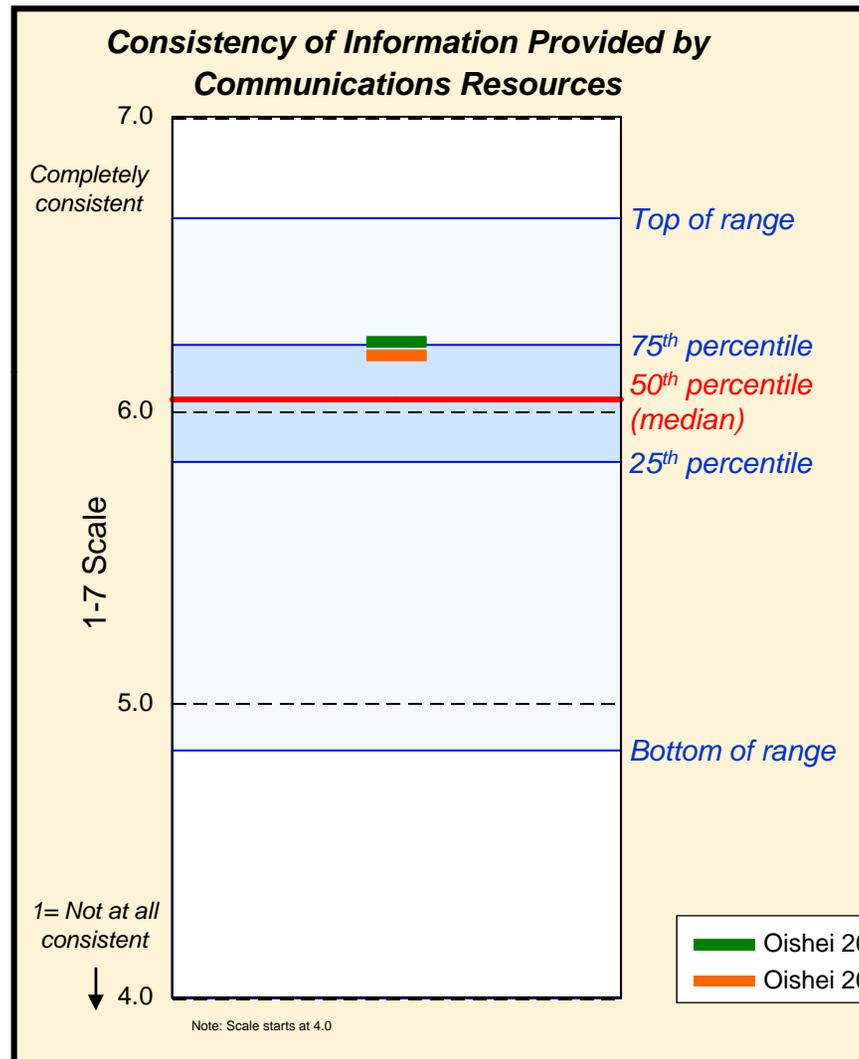
Selected Grantee Comments

- ♦ *“The entire team is very responsive and I do not hesitate to call with questions or just updates on our agencies. All communications are not only professional but very thorough so you understand exactly what is expected from your organization.”*
- ♦ *“At times, the communication is confused between parties, and that the messages/information shared are inconsistent between meetings. Staff appears extremely busy, sometimes rushes and information and decisions shared between staff and our program are at times forgotten.”*
- ♦ *“Staff was very supportive and engaged during our discussions. Communications were frequent and very helpful.”*
- ♦ *“They strive hard to have quality communication. Sometimes the delay in responding causes difficulty when trying to do the rewrites or adjustments.”*

Consistency of Communications

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

- above the median funder



Note: Cohort funder data not available due to changes to the survey instrument.

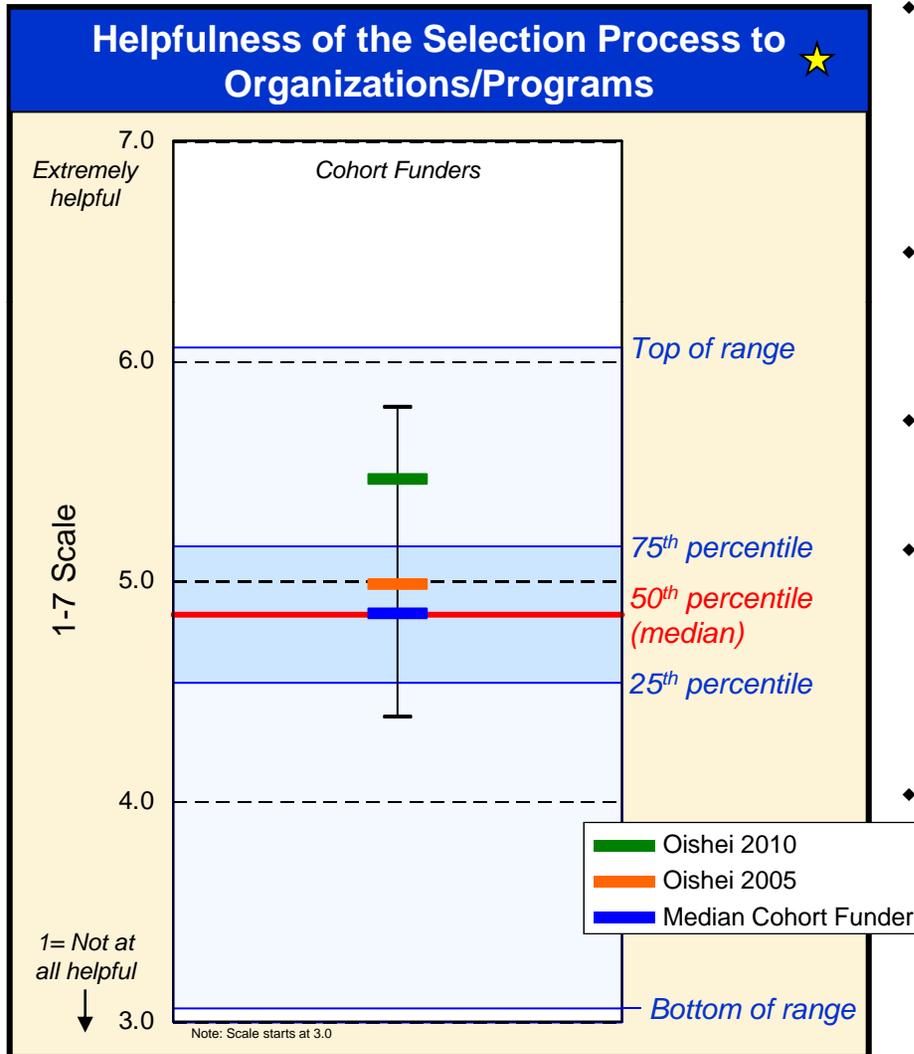
Note: This question includes a "used one or no resources" response option; 3 percent of Oishei 2010 respondents indicated they had used one or no resources, compared to 5 percent at the median funder, 4 percent of Oishei 2005 respondents, and 10 percent of respondents at the median cohort funder.

Helpfulness of Selection Process

On helpfulness of the Foundation’s selection process in strengthening funded organizations/programs, Oishei is rated:

- higher than ninety percent of funders
- above the median cohort funder

Selected Grantee Comments



- ◆ “The process of funding through the Oishei Foundation is thorough and rigorous. Through communication with Foundation staff and review of funding guidelines, the Foundation’s goals and expectations are very clear. The staff is gracious in working with an organization’s staff on grant development and honest with prospects.”
- ◆ “Although we submitted a detailed proposal, we were often – and at the 11th hour – contacted [for] additional and clarifying info. Other work was set aside to furnish all that was requested.”
- ◆ “They encouraged us to ask for what we needed, and not try and figure out the ‘acceptable amount’ to ask for. They were consistent, interested, and helpful.”
- ◆ “Our program does not really have a working knowledge of the ‘process’ that occurs after a grant is submitted. Are there committees of the Board that review the material with staff? How does staff present proposals to the committee or are they presented to the whole Board? How does staff interact with the Board?”
- ◆ “The Foundation officers/staff are extremely helpful in assisting [to] nonprofits formulate a project that is likely to be funded or telling us up front if a proposed project is unlikely to get support so you don’t waste too much time on an application that will be turned down.”

★ = Oishei 2010 rating is significantly higher than Oishei 2005 rating at a 90% confidence level.

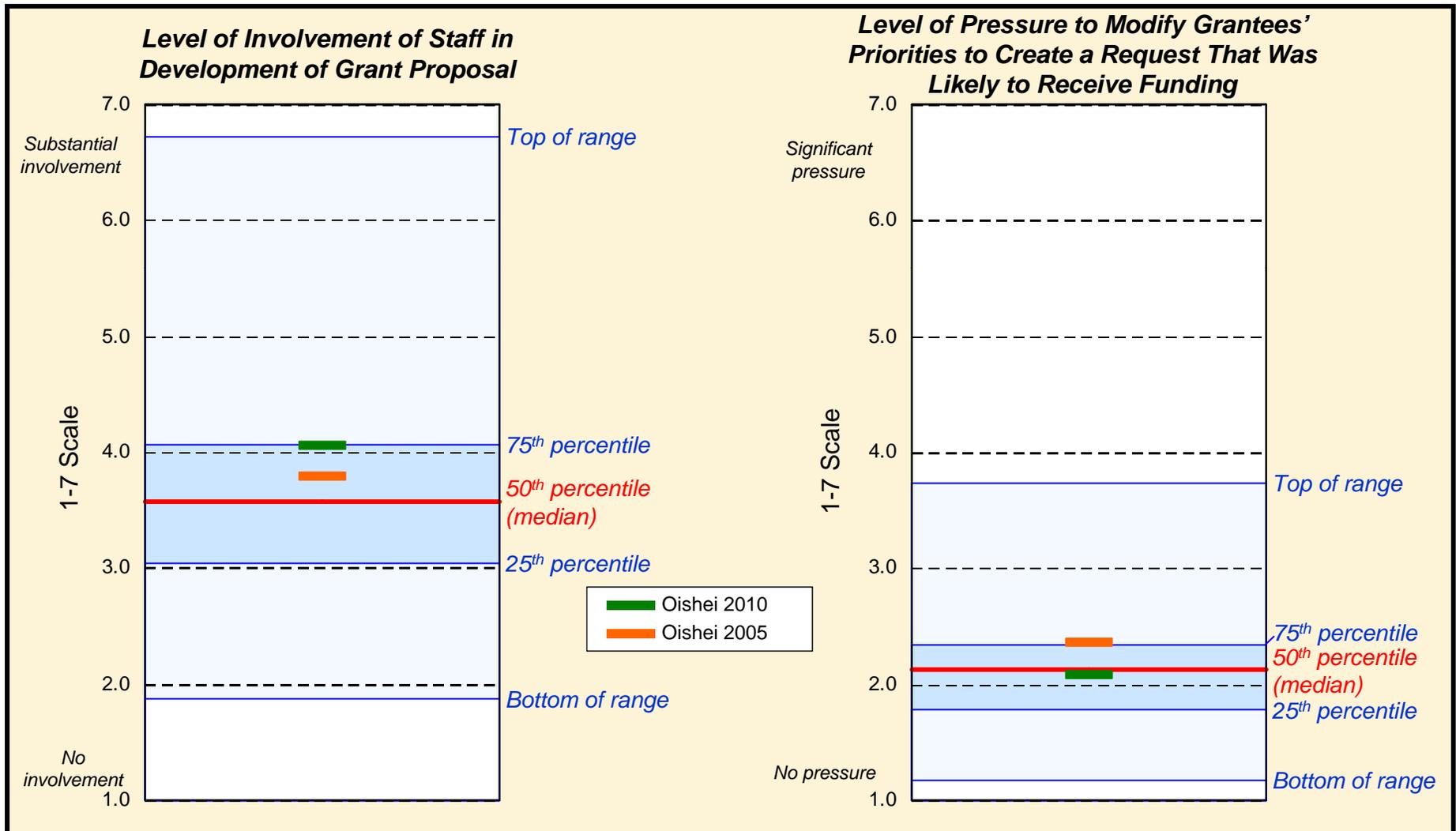
Funder Involvement and Pressure in Selection Process

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

- above the median funder

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

- similarly to the median funder

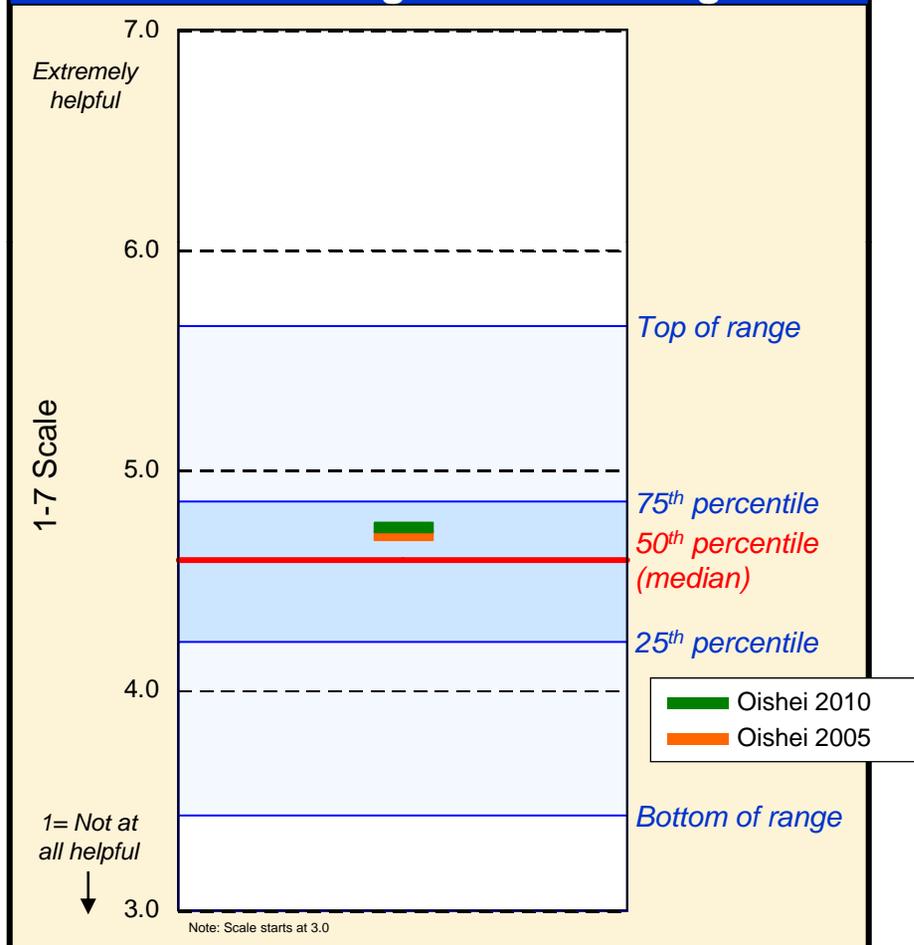


Helpfulness of Reporting and Evaluation Processes

On helpfulness of the Foundation’s reporting/evaluation process in strengthening funded organizations/programs, Oishei is rated:

- above the median funder

Helpfulness of Reporting and Evaluation Processes to Organizations/Programs



Selected Grantee Comments

- ♦ “However strident the Foundation’s specific criteria to be met and reporting measures are, the staff is refreshingly easy in their communication to help grantees understand what’s needed or required.”
- ♦ “The Foundation has always been very approachable and available for questions and guidance when it comes to...implementing grants and evaluating and reporting on grants.”

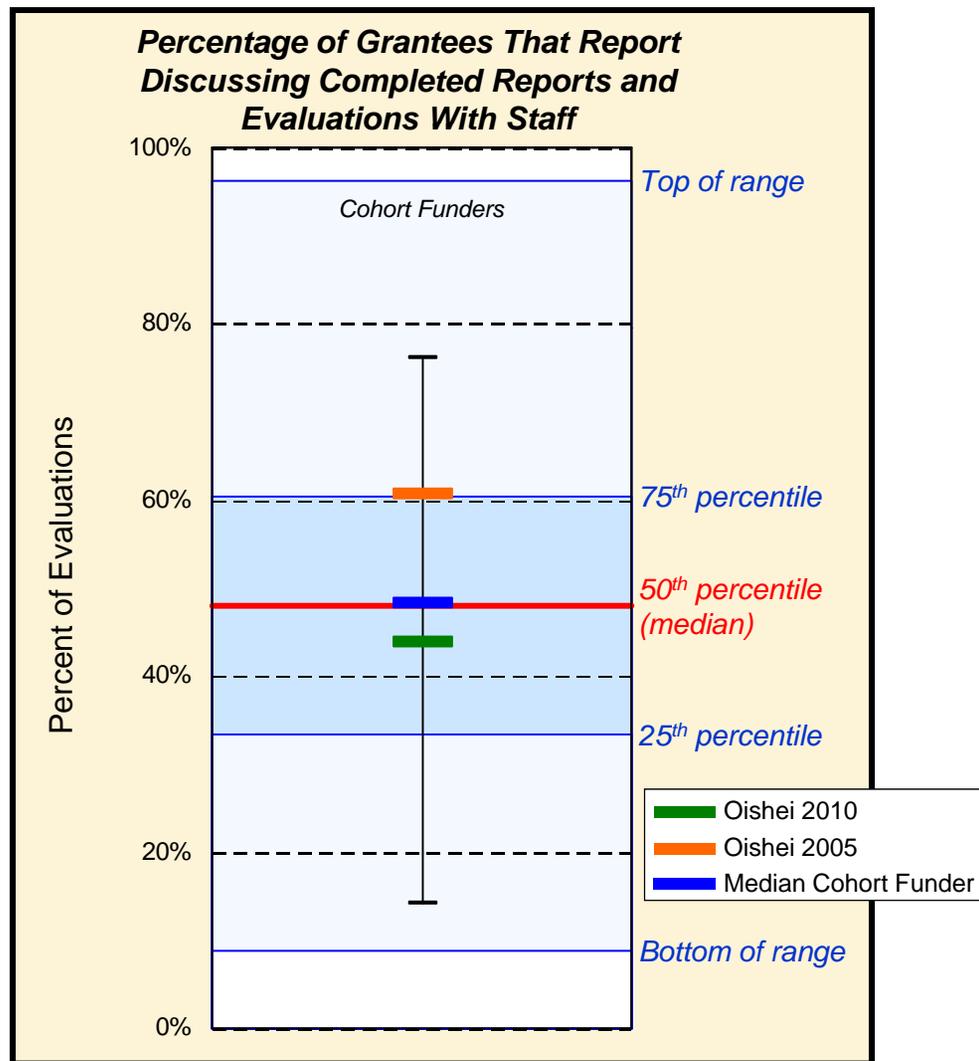
Note: This question was only asked of those grantees that had participated in a reporting or evaluation process by the time they took the survey. For Oishei 2010, 48 percent of grantees indicated that they had participated in a reporting or evaluation process by the time they took the survey, compared to 62 percent at the median funder.

Note: Cohort funder data not available due to changes to the survey instrument.

Reporting and Evaluation Processes

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

- below the median funder
- below the median cohort funder



Oishei Analysis – Variation by Discussion of Completed Reports/Evaluations

Oishei grantees rate the Foundation differently based on whether or not they discussed their completed reports/evaluations with the Foundation or an evaluator.

Grantees who discussed their completed reports/evaluations with the Foundation or an evaluator rate the Foundation significantly higher on:

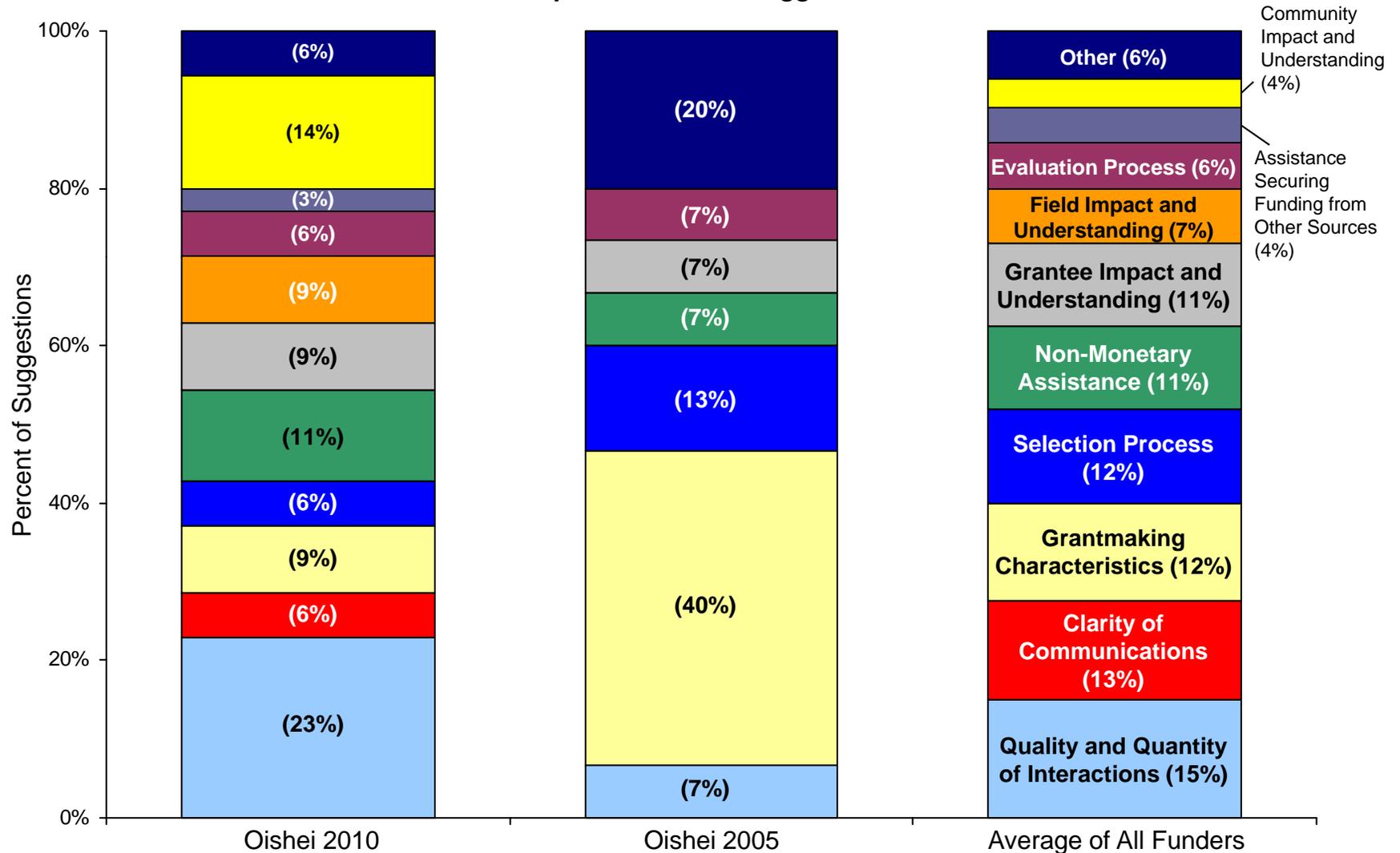
- Helpfulness of the reporting/evaluation process
- Level of Foundation involvement in the development of the grant proposal

Note: This question was only asked of those grantees that had participated in a reporting or evaluation process by the time they took the survey. For Oishei 2010, 48 percent of grantees indicated that they had participated in a reporting or evaluation process by the time they took the survey, compared to 62 percent at the median funder and 56 percent at the median cohort funder.

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 Oishei's suggestions concern the quality and quantity of interactions and the Foundation's community impact and understanding.

Topics of Grantee Suggestions



Note: Proportions may not sum to 100 percent due to rounding. There were a total of 35 grantee suggestions for Oishei in 2010, and 15 grantee suggestions for Oishei in 2005.

Note: Cohort funder data not available due to changes to the survey instrument.

Grantee Suggestions for the Foundation (2)

% Grantee Suggestions		Oishei Grantee Suggestions
Topic of Grantee Suggestion	Oishei	Sub-Themes and Comments
Quality and Quantity of Interactions	23%	<p><u>Site Visits</u>: “To enable board members to see their work [and] its true value to community, a planned visit is suggested.” “Person doing the site visit could stay and learn about the organization and the community and about poverty in the community.” “A site visit would have better served them in understanding the program and our funding request from them than just relying on the proposal and subsequent phone inquiries.” “More time seeing the projects and services they are funding.”</p>
		<p><u>Other</u>: “There can be ‘dark periods’ in communication with various program officers. There is a need for a better sense of customer service at times.” “Might be nice to have a resource person appointed to each grant for questions.” “We would always welcome and appreciate additional face to face meetings and dialogues concerning our organization’s challenges and opportunities.” “The conversation should be more two-way.”</p>
Community Impact and Understanding	14%	<p>“I think there has been a challenge in actively engaging neighborhoods that need the most help, especially the East Side and communities of color.” “To get to innovative solutions to our community’s problems there has to be room for organizations to risk trying new things and sometimes fail but then share the learning.” “Oishei has become more involved as a ‘service provider,’ diverting valuable funds for programs/issues that are short-lived, but take staff away from valuable and other necessary work. Oishei staff and leaders provide such a valuable service to the community, and [wield] such power – grantees are concerned and scared by some of the program decisions, and some favoritism demonstrated out to the community at large.” “For many years, government and the philanthropic community have focused on fixing symptoms rather than finding root causes and developing strategies to reverse the root causes. ... Reversing the trend will take a long-term funding commitment with evidence of progressively better outcomes.” “If the community is going to move forward – there needs to be expertise in all sectors. They seem to be weak on the youth side.”</p>
Non-monetary Assistance	11%	<p><u>Collaborations</u>: “They are leaders and I would love to see them bring together agency leaders and develop a forum for these leaders to talk with one another to discuss major areas of concern. For example: All organizations’ leadership focused on poverty coming together to discuss Poverty. Round table event with Oishei facilitating. Other area of concern are: education, healthcare, environment.” “Actually help facilitate collaboration by providing social or support opportunities for ED’s to network.” “Hosting a roundtable for small not for profits may improve communication and foster new ideas/outcomes.”</p>
		<p><u>Other</u>: “Better utilization of the expertise of Foundation funded investigators. For example, I would love to participate in programs to enhance health care in the community especially as relevant to our research projects, and I see the Foundation as a potential resource in setting this up.”</p>
Grantee Impact and Understanding	9%	<p>“Listen to community organizations you fund...what has their experience been in regards to the pros and cons of collaboration, the support they need to have greater impact, the needs they see to build their capacity or just survive, etc.” “We spent an exceptional amount of time educating the program officer, not only on the details of our proposed project, but also on the larger issues affecting our field of interest.... It is unfair to expect that the program officer become an expert for each proposal presented and be equipped to answer questions or offer supporting information. This scenario is not favorable for the grant-seeker either, especially in the case of large, complex programs.” “The Foundation set a high bar from project sustainability, but then offered no counsel in moving toward that goal.”</p>

Note: There were a total of 35 grantee suggestions for Oishei.

Grantee Suggestions for the Foundation (3)

% Grantee Suggestions		Oishei Grantee Suggestions
Topic of Grantee Suggestion	Oishei	Sub-Themes and Comments
Field Impact and Understanding	9%	“The Foundation has the capacity to bring people to the table who would not normally be inclined to do so. The Foundation should utilize its position to inspire additional collaborations within the non-profit community.” “Focus more on human service support and less on cultural...and economic impact.” “Most philanthropic organizations like to ‘seed’ projects and expect non-profit organizations to find money to sustain and replicate them once the grant period is over. While this method of operating is understandable, it means that the only iron-clad way to sustain and replicate quality programs is to use public money...to replicate evidence-based models. It would be very helpful if philanthropic foundations could influence new legislation or changes to existing legislation that create more effective ways of spending taxpayer money - with significantly better results.”
Grantmaking Characteristics	9%	“It would be helpful if the Foundation would provide grants throughout the year instead of the end of the year. The needs of our people are year round.” “We need funding for general operating.” “We had sought a three-year commitment, but received a single year funding--followed by a second year at less than half the amount. While we are appreciative of the Foundation’s support, it is difficult to plan--and retain experienced staff--with only a 12-month commitment.”
Selection Process	6%	“A much more substantial level of detail was required of us for certain aspects of the proposal (i.e., evaluation and sustainability plans) than was suggested by the guidelines. As a result, we went back and forth with the program officer numerous times. In the future, it would be helpful if the foundation guidelines clearly and directly indicated what is required so that we, as grant-seekers, can cut out the guesswork and more efficiently address the Foundation’s concerns.” “Our organization has received important [non-monetary assistance]...and I wonder why certain other organizations were not required to go through a similar process before being granted large sums of money?”
Evaluation	6%	“We would...love to have a ‘sustained’ relationship aimed at assessing the targeted outcomes of the Foundation’s investment in our organization and, based on the documented results, to continue such investment over a specified period of time (multi-year).” “Community organizations should be accountable for their work and there should be a clear evaluation strategy in place for anyone you fund.”
Clarity of Communication	6%	“I would like to know what other funding opportunities or foundation programs our organization may qualify for.” “It is unclear how [Board members] make their decisions and with what community input. It is not always clear how [the Board’s] stated priorities and their decisions are in line with each other.”
Assistance Securing Funding from Other Sources	3%	“Assistance in identifying other means for sustaining projects initially funded by the Foundation.”
Other	6%	“I feel that the Foundation needs more program staff to alleviate what appears to be very overworked, overburdened current staff.” “If there were a way we could work more closely with the Foundation to help them support their goals, we would be happy to do so.”

Review of Findings

Chart shows the percentile rank of Oishei 2010 (◆), Oishei 2005 (◇), and the median cohort funder (◆) among all funders in the comparative set.

Indicator	Percentile Rank on Indicator					Description of Indicator
	0th	25th	50th	75th	100th	
Impact on the Field		◇	◆	◆		Grantees were asked to rate the funder's impact on their fields.
Impact on the Community				◆	◆◆	Grantees were asked to rate the funder's impact on their local communities.
Impact on the Grantee Organization			◇	◆	◆	Grantees were asked to rate the funder'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 funder fairness, responsiveness, and grantee comfort approaching the funder if a problem arises.
Clarity of Communication of Goals and Strategy			◆	◆◆		Grantees were asked to rate the clarity of the funder's communication of its goals and strategy.
Selection Process			◆	◇	◆	Grantees were asked to rate the helpfulness of the funder's selection process for their organizations.
Reporting and Evaluation Processes ¹				◆◆		Grantees were asked to rate the helpfulness of the funder's reporting and evaluation processes for their organizations.
Dollar Return on Grantee Administrative Hours			◆	◆◆		This summary is the calculation of number of dollars received divided by the time required of grantees to fulfill the funder's administrative requirements.
Percent Receiving Field or Comprehensive Non-Monetary Assistance		◆	◆			The funder's percentile rank on the proportion of grantees receiving higher impact field-focused or comprehensive assistance.
Assistance Securing Funding from Other Sources	% Receiving		◇	◆		The funder's percentile rank on the proportion of grantees receiving assistance securing funding from other sources.
	Impact ¹		◇		◆	Grantees were asked to rate the impact of the funder's assistance securing funding from other sources.

1. Cohort funder data not available due to changes to the survey instrument.

Analysis and Discussion (1)

Overall High Ratings and Improvement since 2005

- Oishei receives higher ratings than other funders on most key measures within the Grantee Perception Report, including impact on grantees' fields, communities, and organizations, as well as overall grantee satisfaction.
- Oishei grantees also rate higher than typical on several key predictors of both perceptions of funder impact and grantee satisfaction, including quality of interactions (fairness of treatment, responsiveness of foundation staff, and comfort approaching the foundation when a problem arises) and consistency of communications.
 - These above typical ratings are the result of increases over 2005 survey results on most dimensions. More specifically, Oishei receives significantly higher ratings on impact on and understanding of grantees' fields, understanding of grantees' organizations, and helpfulness of the selection process.
 - *What practices has the Foundation instituted that may be contributing to its significant improvements since 2005?*

Analysis and Discussion (2)

Frequency of Foundation-Grantee Interactions

- Oishei receives higher ratings than in 2005 on the quality of its interactions with grantees. Compared to other funders, Oishei grantees view the Foundation as more responsive, fair, and approachable. Many grantees describe Foundation staff as “very interactive and responsive to questions and concerns.” However, the largest category of grantee suggestions for improvement concerns interactions with the Foundation. Most of these suggestions are related to the frequency of interactions with the Foundation, in particular grantees’ desire for more frequent site visits.
- The proportion of grantees that interact with the Foundation yearly or less often, although still typical, has increased since 2005. In a finding consistent with CEP’s research, *Working with Grantees*, Oishei grantees who interact with the Foundation yearly or less often rate significantly lower on items throughout the report, including the Foundation’s impact on grantees’ organizations, its understanding of grantees’ local communities, overall satisfaction, quality of interactions with the Foundation, and clarity of the Foundation’s communication of its goals and strategy. Additionally, Oishei grantees indicate receiving site visits less frequently than in 2005 and several suggest that Foundation site visits “would have better served them in understanding the program and our funding request from them than just relying on the proposal and subsequent phone inquiries.” Those grantees who indicate that a site visit occurred during the course of their grant rate significantly higher on the Foundation’s impact on their organizations, responsiveness of and fairness of treatment by Foundation staff, consistency of the Foundation’s communications resources, and the extent to which the Foundation has advanced knowledge in grantees’ fields.
- At the median, Oishei staff members manage 160 grants per full time employee, relative to 50 at the typical funder and 102 at the typical cohort funder. Several grantees comment that the Foundation’s program staff appears “overworked [and] overburdened” and describe staff “delay[s] in responding.”
 - *Given the comparatively heavy caseload of Foundation staff, is it possible for staff members to more frequently engage with Foundation grantees, including through site visits?*
 - *Can the Foundation work to ensure that the grantee experience is not impacted by the Foundation’s current staffing structure?*

Analysis and Discussion (3)

Clarity and Consistency of Foundation Communications

- Oishei grantees rate the Foundation higher than typical when asked about the consistency of information provided by different Foundation resources. Despite this finding, when asked to rate the clarity of the Foundation’s communication of its goals and strategy, grantees offer lower ratings than typical. Some grantees describe “general miscommunication issues” when interacting with the Foundation.
- When asked about the clarity of the Foundation’s communication of its response to the economic crisis, grantees rate the Foundation higher than typical (5.2 versus 4.8 at the typical funder). Additionally, grantees find the Foundation’s response to the current economic climate more helpful than typical (4.5 versus 3.8 at the typical funder).
 - *Has the Foundation undergone recent shifts in guidelines, practices, or strategies that may account for the perceived lack of clarity in the communication of its goals and strategy? If so, what steps can the Foundation take to ensure that key changes within the Foundation are clearly communicated to grantees?*
 - *How can Oishei build upon its successful communication of its response to the current economic climate to more clearly communicate the Foundation’s overall goals and strategies?*

Foundation Engagement in the Selection and Reporting/Evaluation Processes

- Oishei grantees report staff is highly involved in the selection process – a process that is very helpful in strengthening their projects and organizations, and is significantly more helpful than it was in 2005. Grantees report a lower level of Foundation involvement in the reporting/evaluation process.
- Oishei grantees rate the Foundation higher than 90 percent of surveyed funders when asked about the helpfulness of the Foundation’s selection process in strengthening their projects or organizations. Grantees report that the Foundation is highly involved in the development of their proposals. At the same time, grantees are also experiencing less pressure than in 2005 to modify their proposals in pursuit of funding.
- Despite the Foundation’s high level of involvement in the selection process, grantees report discussing their evaluations less frequently than both grantees at the typical funder and Oishei 2005 grantees. Grantees who report discussing their evaluations rate the helpfulness of the reporting/evaluation process a 5.5, while grantees who do not rate the Foundation a 4.2, compared with 4.6 at the typical funder.
 - *Has the Foundation explicitly sought to engage grantees more heavily during the grant selection process and less so during the reporting/evaluation process?*
 - *Given the helpfulness to grantees of discussing their evaluations, is there an opportunity to discuss completed evaluations with a higher proportion of grantees?*

Contact Information

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