

Barr Foundation Grantee Focus Groups – Summary of Findings – May 2018

INTRODUCTION

In March 2018 Barr Foundation asked the Center for Effective Philanthropy (CEP) to conduct grantee focus groups to follow up on 2017 Grantee Perception Report (GPR) findings that suggested some opportunities to ensure the Foundation’s relationships with grantees were as good as they possibly can be.

To that end, CEP conducted 3 confidential grantee focus groups in April 2018. The purpose of these focus groups was to help Barr more deeply understand these findings and identify actionable strategies to increase grantees’ sense of Barr’s approachability.

This memo shares these grantees’ reflections on what Barr is already doing to build strong relationships. It identifies barriers to strong relationships, particularly in its approachability, and offers suggestions for improvement. Finally, it shares their experiences of exemplary practices from other funders.

Because the purpose of this project is to delve more deeply into opportunities for improvement in Barr’s GPR results, what follows is more detail and insight about barriers and challenges than about strengths. Certainly there are core strengths to celebrate, but elucidating them was not the primary purpose of this effort.

As you read these findings, it’s important to remember that the grantee experience is not monolithic and – as we see in CEP’s broad dataset and in Barr’s GPR results – grantee perceptions vary, even of a single Foundation. That holds true in these focus groups as well, particularly when it comes to barriers. Barriers experienced by some grantees were not experienced by others, though there is more agreement amongst grantees about Barr’s strengths. Accordingly, it would be challenging to distill grantees’ experiences into one unanimous takeaway. However, the key barriers and suggestions detailed in this memo represent significant discussions in these focus groups, and this report focuses on themes that generated a notable level of grantee agreement within an individual group. They are a good place to begin a conversation.

Methodology

These focus groups were designed to capture a set of suggestions and examples that Foundation staff can use to surface ideas to inform their work. Working from the same list of grantees that received Barr’s 2017 GPR, CEP created a random stratified sample of 94 Barr grantees and invited them to participate in focus groups. The sample had the following characteristics:

- Continuing grantees, excluding Barr Klarman Cohort, exit, and transition grantees
- Boston metro-area grantees
- Representative across Barr’s program areas
- A broad range of GPR ratings for the strength of the funder-grantee relationship, notably perceptions of Barr’s approachability when a problem arises

These were confidential focus groups. CEP does not share the names of grantees who did or did not participate in focus groups, and we do not report or share identifying grantee characteristics with the Foundation.

CEP facilitated three focus groups in mid-April 2018, each lasting 60-minutes and including 8 participants. Three other grantees, unable to attend a focus group but interested in sharing their

perspective, provided brief telephone feedback. This memo incorporates the perspectives of these 27 Barr grantees.

CURRENT BARR PRACTICES THAT SUPPORT STRONG GRANTEE RELATIONSHIPS

Focus group participants were asked to identify practices at Barr that facilitate strong funder-grantee relationships. Discussions surfaced a number of current practices that grantees feel are important to Barr's current success in building strong funder-grantee relationships. These include:

- ▶ **Valuable engagement from staff during the application process:** Grantees describe numerous helpful practices including: staff "listen" in the application process and "ask good open-ended questions," "set clear expectations for the selection process," "offer valuable feedback," "help develop ideas," "serve as thought partners" and are willing to explore new/different approaches. Says one grantee, "I find Barr very helpful early in the process of developing a grant idea. They are responsive and open to something new, especially when I have a new idea. This has been very important and it's meaningful that they have been responsive to new ideas."
- ▶ **Non-Monetary Support:** Grantees see Barr as having a unique ability to "bring grantees together," to facilitate convenings, and ensure the right "players are at the table." Says one grantee: "Barr can get the right groups of people in the room to make a huge [energy] deal." Grantees value Barr's cohort programs, "willingness to support strategic planning processes" and "investment in leadership development." There is interest in even more of these valuable supports, described below in more detail, particularly connecting grantees to other funders and suggestions that Barr do more to "leverage various grantees whose work has a common thread. Connect grantees to each other, like MacArthur Foundation does."
- ▶ **Grantmaking characteristics:** Large, multi-year grants are immensely valuable sources of flexible funding and suggest trust in grantees. A small group noted enthusiasm for Barr's matching grants, capital grants, support for evaluation and research, and, those with longer relationships with the foundation value the years of continued support.
- ▶ **Reasonable administrative reporting requirements:** Grantees describe reporting requirements as commensurate with grant size and purpose. Grantees value that Barr seeks to learn about challenges and lessons learned throughout the grant, not just successes and accomplishments. Grantees offered comments like: "Some of our funders give us 10% of what Barr does, and they're three times the work" and "They're realistic. Some of our funders have huge expectations for much smaller amounts of money."

ILLUMINATING KEY BARRIERS TO APPROACHABILITY & SUGGESTIONS FOR IMPROVEMENT

A substantial component of focus group discussions centered on grantee ideas for how Barr could address any barriers participants perceived in building the best possible interactions between Barr and grantees, specifically related to approachability and responsiveness. The themes below highlight key opportunities and suggestions from grantees, though none unanimously represent the perspective of all participants. The first three themes are clearly interrelated and representative of the most prominent discussion topics during the focus groups.

Grantees express interest in greater openness and transparency about Barr's goals, strategy, and broad approach, overall and within/across programs – particularly where Barr intentionally funds a range of approaches. They seek to better understand how they fit within Barr's work.

CEP Suggestion: Share more with grantees about the Foundation’s goals, strategy, and intentions within/across program areas, including Barr’s perspective of how its programmatic portfolios inform the Foundation’s approach. Be clearer about the public profile Barr seeks to have for different aspects of its work. Help grantees understand how they connect to Barr’s work, including information about Barr grantees doing related work.

- “They are approachable when it’s clear how we fit in.”
- “We have asked who is in our cohort and who is being funded, but they haven’t told us. We want to know how this fits with Barr’s overall strategy. This would help us connect with others and understand where our work fits with the work of others.”
- “Our work as a grantee cuts across a number of Barr program areas. It would be nice if they shared more about the different parts of the foundation, how it all fits together.”
- “They use a lot of lingo, like risk, but I don’t know what they mean by risk in our cohort...we need more shared language.”
- “Barr is huge. It can be overwhelming. Their website has gotten better this year. But I want to know how it all fits together, to understand what they fund and why.”
- “I want to know more about why they’re funding what they’re funding, the range of approaches they support and why. I’d like them to give us a family tree.”
- “I have the sense that they’re not entirely sure about their approach [in our space]...but they won’t ever tell us that, even after many years of partnership.”
- “Do they want to be Gates or Pew? Us following them, or the other way around?”
- “It’s not clear to me if Barr wants a high profile or to be in the background...they should be more upfront about this.”
- **Grantees that don’t experience Barr in this way say things like:** “Barr is clear and transparent with us about their work. They talk about the risks of moving forward and problems we may have with a grant. I know where I stand with them. I feel like I have clearer parameters with Barr than the other major Boston funders.”

Grantees struggle to understand “where they stand with Barr.” Although grantees find it meaningful and helpful that they select the outcomes against which they report, they want to understand what Barr thinks about their work, are eager for feedback and engagement, and some worry that Barr may not be sharing concerns they have about grantees’ work. Some describe interactions with staff as aloof, which further feeds this sentiment and hampers perceptions of approachability.

CEP Suggestion: Explore ways that Barr can ensure grantees have a better sense of where they stand with Barr. For example, have more discussions about the grant funded work, raise concerns where they exist, and provide respectful, thoughtful feedback about the work, when/as appropriate. Seek to proactively initiate these conversations (as opposed to grantee-initiated discussions), and set expectations about their frequency. Relatedly, building on suggestions noted elsewhere, set expectations for engagement and communicate more about Barr’s work and how grantees fit into Barr’s goals and strategy.

- “I don’t know what they’re thinking.”
- “I don’t know where I stand with them.”
- “I don’t have any clarity about how they make decisions.”

- “I’ve had both sides of the coin with Barr. Sometimes you have to guess where you stand...transparency is not always there.”
- “We don’t get any feedback. We know lots of reporting went up the chain at Barr, but nothing made its way back to us. We got positive signals from them, but the tone in the renewal meeting was very different from the past, not nearly as positive, and we don’t know why.”
- “Take some time at the end of the grant to give some direct feedback.”
- “Approachability is different for grantees innovating and trying something new versus those funded to scale something that has been proven to work. It’s really hard to call Barr with a problem on something that we thought works and were funded to scale.”
- “Sometimes they come to events, events with many organizations they are funding, and they sit in the back of the room and don’t say a word. The conversation is different when they are in the room. This influences the dynamic and because they don’t say a word, we don’t know what they’re thinking.”
- “We invite them to our activities but they don’t show up.”
- “I don’t reach out because I don’t feel welcome. The signals have been cold. In-person meetings haven’t felt collegial. From my PO to the top, interactions have felt terse.”
- “Our program officer runs hot and cold, and I think it’s not up to her...”
- “Staff have made incorrect assumptions, assumed the worse. Be more open-minded. Don’t assume.”
- **On the other hand, a few grantees describe how valuable it is when they know where they stand with Barr.**
 - “We were doing really well on most of our grant, but struggling in one specific area. When our program officer brought it up with us, it was like she was a mind-reader. She made it seem like it wasn’t a problem, and quickly connected us to people who helped us solve the issue. That transparency and open conversation was very helpful to us.”
 - “A site visit totally changed the tone...they met our staff, heard firsthand what’s been going on, and since then we’ve had more direct conversations.”
 - “They are responsive and clear and we are in regular communication. They talk to us early on about where they are heading, what comes next, and they give us guidance throughout the process.”

Grantees value Barr staff’s substantial and helpful involvement with them during the application process. However, a sudden drop in involvement after the grant approval feels surprising to some grantees and creates a sense of uncertainty about what level/frequency of responsiveness and interactions they can expect, whether they should be approaching the foundation, or whether this limited engagement signals a problem. Very few grantees said that Barr explicitly set expectations with them about what the relationship would look like.

CEP Suggestion: Set expectations clearly with individual grantees about the level and frequency of engagement they should reasonably expect after the grant is awarded. Help grantees understand Barr’s preferences for moments or opportunities at which Barr would like to be contacted or will cause Barr to contact grantees.

- “It’s like falling off a cliff. Am I screwing up? How do I know?”
- “We felt left in limbo.”

- “After we got the grant they stopped being in touch. It made me worried. Am I doing something wrong? Nothing was articulated, so I just figured that the expectation was that they didn’t need contact.”
- “They set a high bar to get in the door. Once you have the grant, you’re on your own. It is nice that we aren’t micromanaged.”
- “I don’t know how often to reach out, or if they want to hear from me.”
- “Distance is fine, but only because I know that they’re not concerned with our work...”
- “It’s not clear if they want to be hands off or not...”
- “They’ve been very involved, but they haven’t worked to build trust with us. Our staff are fearful of this. It’s not clear if they want to be involved in some aspects of the work, if they need to sign off on events/programs, if they need to be in the room.”

Despite a belief that Barr desires to be a supportive and open funder, grantees sometimes perceive Barr to be mysterious and feel set-apart from them. This is magnified by the Foundation’s size and power, and small signals can be perceived by grantees to carry tremendous weight.

CEP Suggestion: Remain aware of the reality that Barr’s size and power have both real and perceived implications how grantees view the Foundation. Consider mitigating this by finding more informal ways to connect with grantees, and continuing to push transparency and openness in its goals and strategies.

- “They are just so powerful and have so many connections.”
- “I give them credit for the things they are trying to do to communicate their work. It’s a visible effort and thoughtfully exercised. Barr tries to send the signal that they want to work with you, that they aren’t ‘king of the hill,’ but the reality is different. They are a 1,600 pound gorilla.”
- “They don’t have meet and greets.”
- “They don’t reach out when there are staff changes.”
- “There is a desire to be collaborative, but the execution is off.”
- **Relatedly, some grantees note that Barr’s power may unintentionally limit access to some voices and perspectives, particularly those of small community based organizations. These perceptions can make it difficult even for existing grantees to understand when and who should reach out to the Foundation.**
 - “[They should not] not lead by invitation or connection only. They are so powerful and are keeping access from grassroots organizations that don’t have those connections.”
 - “There are some controlling things that might not allow the dialogue that they say they want. They convene grantees but sometimes limit who can talk. They limit it to executives in their convenings.”
 - “Small organizations feel that the door is closed to Barr.”
 - “I wonder how smaller less resourced organizations can get through Barr’s process.”
 - “I banged on Barr’s door for almost 10 years. They were funding efforts similar to ours. They finally got back to me after someone put in a good word. In our view there isn’t a solid rationale why we were blocked for so long.”
 - “For years they refused a meeting and finally agreed to meet with us. At the end of the meeting, which they started by saying they would never fund us, they invited us to apply for a large grant.”

Some grantees see opportunity for Barr to increase its approachability by greater listening to grantees' expertise.

CEP Suggestion: Demonstrate good listening (e.g., ask open-ended questions) and show grantees Barr values their expertise.

- “They seem to be undertaking funding activities on issues in our field but they aren’t including relevant stakeholders or coordinating amongst grantees.”
- “When they enter a new issue, they should listen more, and engage grantees.”
- “I wish our relationship were more of a partnership, I’m looking for a partner to think about our work with us, about new spaces for our work. But it’s just not there. With our other funders, there’s trust that we have expertise, but I don’t get that sense with Barr. I’d like for them to define their role with us.”
- “They should be a little more open minded. They don’t necessarily have the pulse on the ground. I think they can do more.”
- **Grantees that don’t experience Barr in this way say things like:** “When Barr shows me that they know my strategy and goals and when they think through opportunities with us, it makes me feel like they are supporting my organization through both successes and challenges, even and especially during change.”

Program officers are central to grantees' experience, but there are broad variations in grantees' experiences. Some program officers are perceived exceptionally positively, and others less so, with negative implications on relationships with grantees. Grantees who have had different program officers comment on the broad range of responsiveness and approachability they have experienced.

CEP Suggestion: Identify areas where Barr believes there should be a consistent approach and be explicit about where variation is welcome, based on the Foundation’s goals, strategy and context.

- “I’ve had 5 POs and have been funded under multiple programs, and there’s huge variation. The bandwidth is different. Some POs are perfect and others are overwhelmed and others don’t respond. It doesn’t feel like they’re internally coordinated.”
- “They had been a model of approachability of a major foundation. But now I don’t get response to emails or phone calls. I know people are busy and, as a busy person myself, I’m sympathetic to the problem. But staff don’t follow through, and that makes them not approachable.”
- “Historically staff were amazing and approachable, but as they’ve staffed up, the lines of who to reach out to are unclear.”
- “Our program officer’s lack of responsiveness is a bottleneck for us.”
- **This isn’t the case for all, though, and some grantees saying:**
 - “We worship our Barr program officer. She always said what is going well and what is not. I never felt like I had to hide things from her. She is who we call when we have a problem.”
 - “Our program officer made our 'sunsetting' into the best breakup we’ve ever had. She gave us two year’s notice. She introduced us to other funders and is bending over backwards to help us as we phase out.”
 - “My program officer says call me anytime, and she means it.”

Grantees identify a staff capacity challenge, and perceive program staff to be overwhelmed and stretched thin. Some note that this directly influences responsiveness and approachability, and makes them question whether they should, or shouldn't, initiate contact. Some suggest adding more staff, or recalibrating expectations, particularly in program areas that are new, where Barr is taking a leadership role, or engaged in time-intensive collaborations.

CEP Suggestion: Reflect on the many factors that affect staff load and that ripple out to the grantee experience, such as: the number of program staff, grantmaking characteristics (especially grant length), portfolio size, program approach/strategy, provision of non-monetary assistance, responsibilities of program staff beyond grantmaking.

- “In areas where Barr is trying to lead and trying new things, they need more staff capacity. They need three times the staff in [my program].”
- “Our primary contact seems unbearably busy. Our circle of grantees has had trouble. It takes months to get a meeting.”
- “Staff look maxed out.”
- “I love our program officer but she is busy and I can't get a response.”
- “I think of our program officer as responsive but very overwhelmed and busy.”
- “I consistently get emails late at night, early in the morning, and on the weekends from my program officer. Barr has an issue with sustainability of staff workload.”
- “There are communications lags and I would encourage them to think about staff load.”

Flexible funding from Barr - notably long, large grants - carries outsized importance to grantees. So, conversations about Barr grant funding are also of outsized importance. Some grantees describe conversations about budget changes, delayed invitations to submit proposals, modifications to grant timing/disbursement, and project amendments that felt unnecessarily last minute and/or were experienced with a tone that suggested, to grantees, that staff do not fully appreciate the importance of their Barr grant to their organization's work. For a few grantees, contingent funding on multi-year grants conveys a sense of distrust.

CEP Suggestion: Demonstrate greater empathy to grantees regarding the outsized importance of Barr funding to their organizations. Seek to limit and reduce the last minute changes described above and approach them with greater sensitivity and respect when they are necessary.

- “I've had to re-budget multiple times and they still won't respond, and I can't do my job.”
- “Late in the process, after it was clear what we were going to do, they came back to us with amendments. It was a directive, not a suggestion. It wasn't clear why this decision was made, and wasn't informed by previous conversations.”
- “We have had uncertainty with our Barr funding. Please let us know where we stand, please no last minute surprises.”
- “They told us the grant would come through in [month], but it came through 4 months later. This created a real challenge for our organization and hampered trust.”
- “Barr is our only multi-year funder that has contingent funding. That's symbolic of the challenge, at the very root. It creates a sense that we always need to prove ourselves to them. Other funders don't do that. It's like Barr views this as 1-year grant with the rest of the funding contingent of results.”

- “Communicate more responsibly with us when it’s about money. Some conversations about money have felt too glib.”

Grantees value the non-monetary supports that Barr provides, and are interested in more supports. They suggest that Barr can do more to leverage the credibility of Barr grant funding. They would like Barr to facilitate introductions to other funders and leaders. There is also interest in Barr taking on a greater role in facilitating grantee connections, convenings, and collaborations.

CEP Suggestion: In light of overwhelming interest, seek to connect grantees to other sources of funding, especially for grantees Barr would like to have more diversified funding sources.

- “More than the dollar value of the Barr grant, a grant from Barr lends credibility. It would be great if they could amplify their voice. They should toot their own horn.”
- “They want us to diversify our funding but when I asked them for help and connections to other funders, they didn’t respond.”
- “Don’t ask us to diversify without giving us ideas; work with us to find new sources of funding.”
- “They want us to diversify our funding sources but they don’t facilitate connections to other funders. They could easily connect us to Kresge, Ford, Rockefeller.”
- “I thought breaking into Barr would be an amazing seal of approval. I can’t think of a time that Barr helped us get another grant. But our other largest funders all do this.”
- “Be our cheerleader...connect us to other funders and share our work.”
- “Convene more conversations that respond to external issues/sector issues.”
- “I would like Barr to do more to connect grantees to each other, especially those doing related work.”
- **This isn’t the case for all, though, and one grantee noted:** “When Barr has helped us find other funders, it has been a sign post to us that they think we’re successful.”

DEI and more direct public policy/advocacy efforts are two examples of issues that grantees know Barr cares about (“The DEI fellowship is a great idea”). Grantees are enthusiastic about this, but describe differing interpretations of Barr’s communications and actions, which can make them uncertain about whether and how they can engage with Barr on DEI or public policy conversations.

CEP Suggestion: Build internal clarity about Barr’s approach on DEI and public policy and communicate this more clearly with grantees.

- DEI:
 - “Keep at it on the equity front. It’s a challenge in this region. Be resilient and tenacious.”
 - “Barr has shown greater commitment to equity and diversity, but they can do more.”
 - “Barr has been schizophrenic about equity issues. Sometimes they emphasize it, and sometimes they say nothing. It would be nice to have a consistent policy.”
 - “Doesn’t seem like staff are on the same page, or that they’re able to help us with DEI.”
 - “For decades they played around the edges of DEI and it seems like they are looking at doing this more deeply.”
 - “We were told we needed to diversify our board in a way that felt inappropriate and that lacked context.”

- Public Policy:
 - “I’d like them to push on policy, to be more upfront and clear in their values, expectations and plans for policy and advocacy.”
 - “They are confused and seem scared to do policy work...I understand it may be difficult given the circles they’re in.”
 - “They’ve said they want to pursue policy work, but they seem really concerned...it’s not clear who is calling the shots.”
 - “I understand Barr’s goals but I don’t get ‘the how.’ If they are willing to push, are they going to do more advocacy?”
 - “For decades they were quiet on public policy, and then they flipped, and now have aggressive public policy stances. But they seem scared to stand solidly...and they just disappeared, quietly, from their BPS work.”
 - “My sense is that they shy away from advocacy work, and it’s not clear to me how public they want to be.”

PRACTICES OF “EXEMPLAR” FUNDERS

Focus group participants were also asked to share their perspectives on high quality funder interactions in the broadest sense, not specifically with regard to Barr, including practices behind exemplary funder approachability and responsiveness. In the discussion about approachability and responsiveness, grantees frequently spoke about practices beyond these two specific constructs. They tended to share practices and characteristics of strong funder-grantee relationships, overall, such as broad-based trust, understanding, openness, transparency, clarity of communications, and a sense of shared goals and working together in partnership. The key themes they describe as core to exemplary funder-grantee relationships are below.

Exemplary funders bring trust, dialogue, openness, transparency, and good listening to their work, demonstrating that the partnership is a two-way street.

- “Brainstorm with me, like a colleague. In an open way, without the sense that you are opening issues. A give and take of ideas.”
- “My most approachable funders engage me when things are happening in our field, and give us a sense that we’re working in a shared partnership. They reach out to me as an expert in the field.”
- “Vulnerability, when we can talk about where they, as a funder, are strong and where they are not. When they share their vulnerability with us, then I can share my vulnerability and call them with my problems. They can show me this by engaging with me. Ask me about things happening in my field, especially when there are changes in context. When funders initiate contact outside of the report or the grant, that’s when I feel they are approachable.”
- “The ability to listen.”
- “Listen before judging or reacting.”
- “Tell us where your board is going. Be transparent. Give us the inside scoop.”
- “Honest, real conversations about the work, what we’re excited about and what we’re struggling with. That helps us feel like we can be transparent about changes in our work and challenges, reassures us that we can call you.”
- “It’s not about scheduled check-ins, it’s about staff asking questions, being open about what they don’t know, sharing with us their considerations, showing us that you have read our reports.”

- “They’re willing to strategize with us...and they raise concerns early-on.”
- “My best program officer ever was at RWJF...we had shared goals and clear roles, and it was clear what we were trying to achieve together. She was our cheerleader. Given how hard the work was, that was awesome.”
- “Be transparent with us about your concerns, especially those that are at the foundation level.”
- “Make time and call me back when I get in touch, specifically if I say it’s important. It’s hard to have a relationship when I can’t get on your calendar.”
- “Upfront and early conversations.”

Exemplary funders build and demonstrate an understanding of the work and what it demands, and engage as a thought partner with grantees in ways that respects and values grantees’ expertise.

- “The best funders have been on the nonprofit side of the table.”
- “Demonstrate that you understand the work. With funders that understand us, we can have a more productive conversation. We may not agree on everything, we don’t need to always agree. But the deep understanding sets the basis for a good relationship and productive conversation.”
- “Get to know us, not just in writing. Meet with us before we take the time to write a proposal.”
- “Trust me as an expert.”
- “Help us flesh out ideas, but don’t dictate what is effective or how we measure.”
- “The best funders think about us as an organization, not just a grant. They tell us about their work, help us with fundraising, ask us about emerging issues...”
- “Take the time to get to know us.”

Exemplary funders anticipate and ask about changes and problems, are “solution-oriented, non-judgmental,” and support course-corrections. Their actions demonstrate that “they understand that failure and challenge are natural” and they “set a tone that I can share my problems with them.”

- “Our best funders expect failure and struggle and they show us in conversations, early on, that they expect these things. So when I call them about a problem, it makes it easy because they already set the tone.”
- “When we call because something has come up, we’re instantly made to feel like ‘great you have a problem,’ let’s see how we can help.”
- “Our concept of a deliverable might change over time due to circumstances. We find funders most responsive and approachable when they collaborate robustly with us, when we talk to each other, and reach common, shared outcomes.”
- “There is an inevitability of shifting goals. The best funders are agile and accepting of shifting and changing goals.”

Exemplary funders clearly, openly, and transparently communicate with grantees about the Foundation’s goals and strategy, what they are doing and why, how grantees’ fit into the strategy, and share what types of work they fund in grantees’ spaces.

- “Check in with us when there’s a change.”
- “Be transparent, help us ensure a shared vision.”
- “Tell us how we fit in with their strategy, when they tell us how we fit into what they want to achieve.”

CONCLUSION

It is our hope that the themes and suggestions shared in this report inform rich discussion at Barr Foundation's upcoming staff retreat.

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