

**BARR FOUNDATION**

*Using KNOWLEDGE, NETWORKS and FUNDING  
to Build a Better Boston for All*

# **Barr Foundation 2007 Grantee Perception Survey**

Key findings and analysis

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# Introduction

In the fall of 2007, Barr engaged the [Center for Effective Philanthropy](#) (CEP) to conduct our second Grantee Perception Report® (our first was in 2003). We invited all of our grantees to share feedback about our performance.

Foundations have few opportunities to receive candid feedback on how well they are serving their constituents. Through CEP's survey, nearly 200 of our grantees shared their feedback about our work with them. Their ratings and comments were both encouraging and constructive—highlighting ways we have been effective, and also opportunities to improve.

The following slides are excerpted from CEP's March, 2008 presentation to our Board of Trustees. They describe the survey's methodology and key findings.

Our sincere thanks to our grantees for their many insights. We are reviewing and revising our practices to improve based on this feedback. We look forward to working with and learning from you in the years to come.

*EXCERPT*

# Grantee Perception Report<sup>®</sup>

prepared for the

**Barr Foundation**

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# Methodology

- ◆ The Center for Effective Philanthropy (CEP) has surveyed more than 40,000 grantees of 208 foundations since spring 2003.
- ◆ 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 271 fiscal year 2006 grantees of the Barr Foundation (“Barr”) during September and October 2007. CEP received 198 completed responses, a 73 percent response rate.
  - CEP surveyed 225 July 2002 through July 2003 grantees of Barr during September and October 2003. CEP received 153 completed responses, a 68 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 mail and the Web.<sup>2</sup>
- ◆ Barr provided grantee contact information.
- ◆ Barr is also compared to a cohort of private, regional foundations chosen by the Foundation to represent its peers.
- ◆ Finally, throughout this report, Barr average ratings in both 2007 and 2003 are shown segmented by those grantees that received Foundation grants\*.
  - In 2007, 139 out of 198 grantee respondents reported receiving Foundation grants
  - In 2003, 108 out of 153 grantee respondents reported receiving Foundation grants

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.

# Key Findings

Overall, the Barr Foundation (“Barr”) is rated positively by its grantees. Grantees of the Foundation are more satisfied than grantees of the median foundation, and they provide many positive comments about the Foundation, describing Barr as “supportive,” “thoughtful” and “knowledgeable.” Grantee perceptions of the Foundation have improved significantly on a number of key measures since CEP’s survey of Barr grantees in 2003.

On the measure of impact on grantees’ fields, Barr is rated similarly to the median foundation. However, the measures of the Foundation’s ability to advance knowledge in grantees’ fields and its effect on public policy, Barr is rated above the median foundation. Additionally, on measures of understanding of grantees’ fields, and impact on and understanding of grantees’ local communities and organizations the Foundation is rated at or above the 75<sup>th</sup> percentile among all foundations.

Barr grantees rate the Foundation higher than typical for the quality of its interactions, and for its responsiveness, grantees rate Barr above the 75<sup>th</sup> percentile among all foundations. The Foundation’s rating for the clarity of communication of its goals and strategy has increased significantly since 2003, and Barr is rated similarly to the median foundation on this measure as well as on the measure of the consistency of its communications, both personal and written.

A larger than typical proportion of Barr grantees receive assistance beyond the grant check in the form of non-monetary assistance activities and assistance securing funding from other sources. Some grantees comment that the Foundation’s anonymity prevents them from “leveraging its reputation” to build “credibility” and receive funds from other sources – similar to grantee comments in 2003.

The Foundation is rated very positively for the helpfulness of its selection process in strengthening grantee organizations – above the 75<sup>th</sup> percentile – and Barr staff are perceived to be more involved in the selection process than typical. The Foundation’s reporting and evaluation process is also rated positively. On average the Foundation makes grants that are larger in size than grants at the median foundation and has administrative processes that are similarly time-intensive, resulting in grantees receiving a larger than typical number of dollars for each administrative hour they spend fulfilling administrative requirements associated with their Barr grant.

# Review of Findings

Chart shows Barr 2007 Foundation Grants (◆), Barr 2003 Foundation Grants (◆), and median cohort foundation (◆) percentile rank among all foundations in the comparative set.

Indicator	Percentile					Description
	0th	25th	50th	75th	100th	
Overall Effectiveness <sup>1,2</sup>					◆	Grantees were asked to rate the foundation's overall effectiveness in creating social impact.
Impact on the Field		◆		◆	◆	Grantees were asked to rate the foundation's impact on their fields.
Impact on the Community				◆	◆	Grantees were asked to rate the foundation's impact on their local communities.
Impact on the Grantee Organization				◆	◆	Grantees were asked to rate the foundation's impact on their organizations.
Satisfaction				◆	◆	Grantees were asked to rate their satisfaction with their funder.
Interactions				◆	◆	This summary includes grantee ratings of foundation fairness, responsiveness, and grantee comfort approaching the foundation if a problem arises.
Clarity of Communication of Goals and Strategy	◆			◆		Grantees were asked to rate the clarity of the foundation's communication of its goals and strategy.
Non-Monetary Assistance <sup>1</sup>				◆	◆	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 <sup>1</sup>				◆	◆	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 <sup>1</sup>				◆	◆	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.

1: Barr 2003 data not available due to changes to the survey instrument.  
2: Cohort data not available due to changes to the survey instrument.