

*Excerpt*  
Grantee Perception Report®

prepared for

**Barr Foundation**

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EFFECTIVE PHILANTHROPY

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# Methodology – The Foundation’s Grantee Survey

- ◆ The Center for Effective Philanthropy (CEP) surveyed the grantees of Barr Foundation (“Barr”) during September and October 2012. CEP has surveyed Barr’s grantees in the past. Where possible, ratings from these surveys are also shown in the report. The details of Barr’s surveys are as follows:

Survey	Survey Period	Fiscal Year of Surveyed Grantees	Number of Grantees Surveyed	Number of Responses Received	Survey Response Rate <sup>1</sup>
Barr 2012	September and October 2012	2011	166	106	64%
Barr 2007	September and October 2007	2006	271	198	73%

- ◆ 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.
- ◆ The grantee feedback in this report was collected through CEP’s proprietary GPR survey. All individual grantee responses have been kept confidential: CEP does not report or share individual responses or identifying characteristics of survey respondents with funders. All comments are redacted to protect grantee confidentiality.

1: The median response rate for individual funders over the last nine years of surveys is 69 percent.

2: 12 grantees’ responses are not shown in the segmentation because they indicated they do not know their grant status. These responses are included in the Foundation’s overall average rating.

3: 16 grantees’ responses are not shown in the segmentations because they indicated they do not know their grant program. These responses are included in the Foundation’s overall average rating. Segmented data not shown for Civic & Community and Nonprofit and Philanthropy grantees because there were too few respondents.

## Methodology – Comparative Data

- ◆ Barr’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 nine years. Please see Appendix B for a list of all funders whose grantees CEP has surveyed.

Full Comparative Set	
Grantee Responses	41,697 grantees
Philanthropic Funders	290 funders

- ◆ Barr is also compared to a cohort of 12 peer funders. The group of 12 funders comprises the following funders:

Peer Funders	
Brown Foundation	Heinz Endowments
Cleveland Foundation	Houston Endowment
Colorado Health Foundation	James Irvine Foundation
Daniels Fund	Richard King Mellon Foundation
Duke Endowment	Weingart Foundation
Evelyn and Walter Haas, Jr. Fund	William Penn Foundation

- ◆ Within this report, CEP describes the comparison between Barr grantee ratings and grantee ratings of other funders based on the percentile rank of Barr. On measures with a 1-7 scale, grantee ratings for Barr are described as “above typical” or “above the median funder” when they fall above the 65<sup>th</sup> percentile, and “below typical” or “below the median funder” when they fall below the 35<sup>th</sup> percentile. Proportions of Barr grantees are described as “larger than typical” or “smaller than typical” when the proportion being referenced falls above or below the 65<sup>th</sup> or 35<sup>th</sup> percentile.
- ◆ The proportion of surveyed grantees who were not currently receiving funding from the Foundation at the time of the survey is larger than typical – 40 percent versus 25 percent. Across all foundations, and at Barr, grantees no longer receiving funding rate foundations lower than grantees who are still receiving funding.

# 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, Barr awards a larger than typical proportion of its grantees with multi-year support.

Survey Item	Barr 2012	Barr 2007	Full Dataset Median	Peer Funder Median
<b>Grant Size</b>				
Median grant size	\$238K	\$150K	\$60K	\$150K
<b>Grant Length</b>				
Average grant length	2.8 years	2.2 years	2.1 years	2.0 years
Percent of grantees receiving multi-year grants	83%	65%	49%	57%
<b>Type of Support</b>				
Percent of grantees receiving operating support	31%	28%	20%	21%
Percent of grantees receiving program/project support	60%	57%	65%	64%
Percent of grantees receiving other types of support	9%	15%	15%	15%

# 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.
- ◆ Barr grantees' budgets are similar to the budgets of grantees at the typical foundation and typical peer funder.

Survey Item	Barr 2012	Barr 2007	Full Dataset Median	Peer Funder Median
<b>Budget of Funded Organizations</b>				
Typical organizational budget	\$1.5MM	\$1.8MM	\$1.4MM	\$1.4MM
<b>Duration of Funded Program and Grantee Organization</b>				
Programs conducted 6 years or more	37%	N/A	33%	33%
Median length of establishment of grantee organizations	21 years	22 years	24 years	25 years

Note: Barr 2007 data on "Programs conducted 6 years or more" and not available due to changes to the survey instrument.

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 Appendix B.

# Structural Characteristics of Funders

- ♦ This table is intended to provide context to the Foundation in thinking about its GPR results relative to its grantmaking and staffing. This information is based on IRS filings and data supplied by philanthropic funders that have subscribed to the GPR.
- ♦ The number of grants processed and managed per program staff full-time employee at Barr is larger than that of the typical funder.

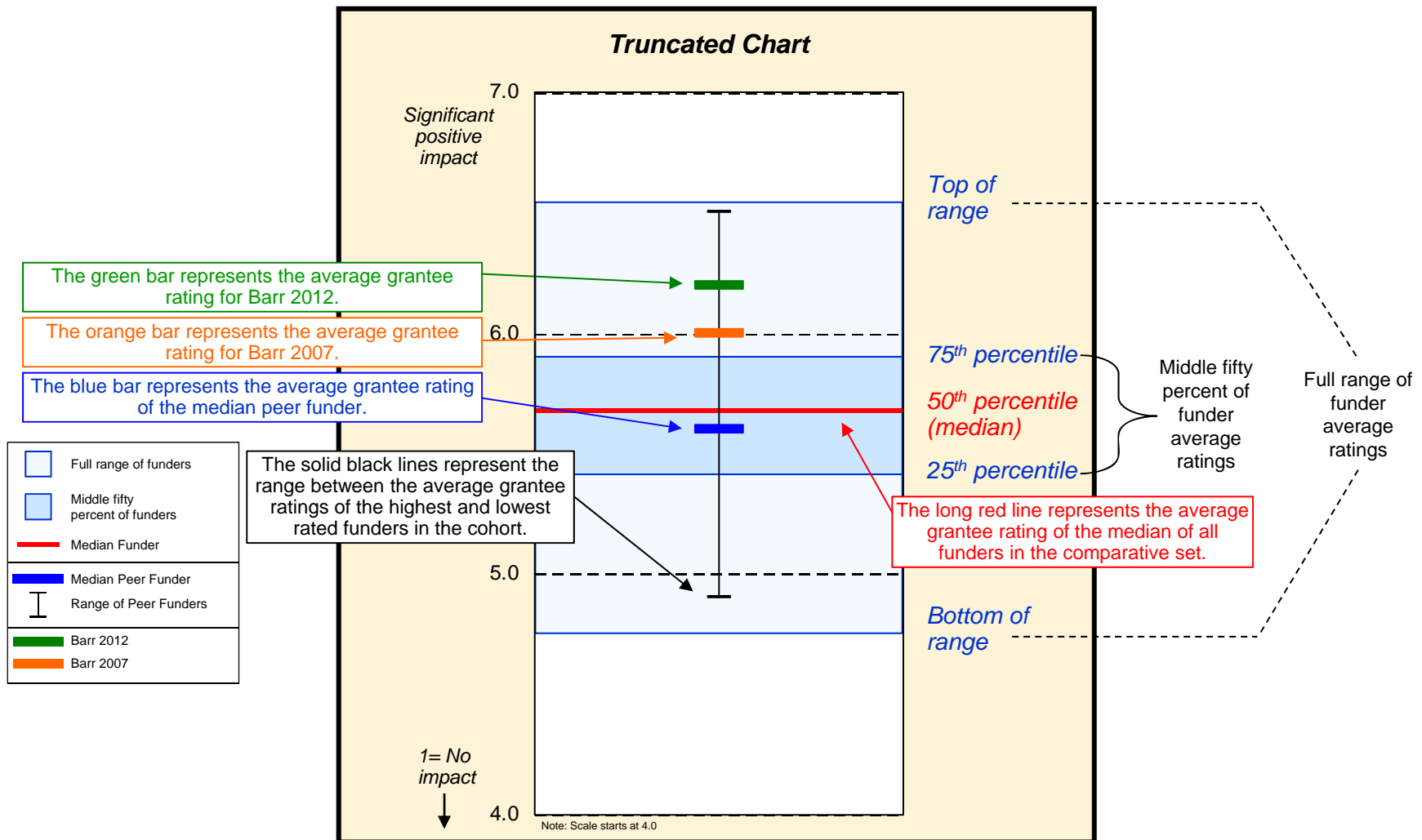
Survey Item	Barr 2012	Barr 2007	Full Dataset Median	Peer Funder Median
<b>Program Staff Load</b>				
Dollars awarded per program staff full-time employee	\$7.6MM	\$6.6MM	\$2.5MM	\$5.6MM
Applications per program full-time employee	37 applications	33 applications	27 applications	29 applications
Grants awarded per program full-time employee	37 grants	51 grants	20 grants	22 grants
Active grants per program full-time employee <sup>1</sup>	65 grants	63 grants	32 grants	37 grants

1: This calculation excludes ACS, Holiday, Membership, Conference Sponsorship, Conference Scholarship and administrative grants.

Note: Funders of different sizes and focuses choose to structure their organizations 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. For additional information on funder characteristics related to these survey items refer to Appendix B.

# 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 Barr, over a background that shows percentiles for the average ratings for the full comparative set of 290 philanthropic funders. **Throughout the report, many charts in this format are truncated from the full scale because funder averages fall within the top half of the absolute range.**



# Foundation Descriptors

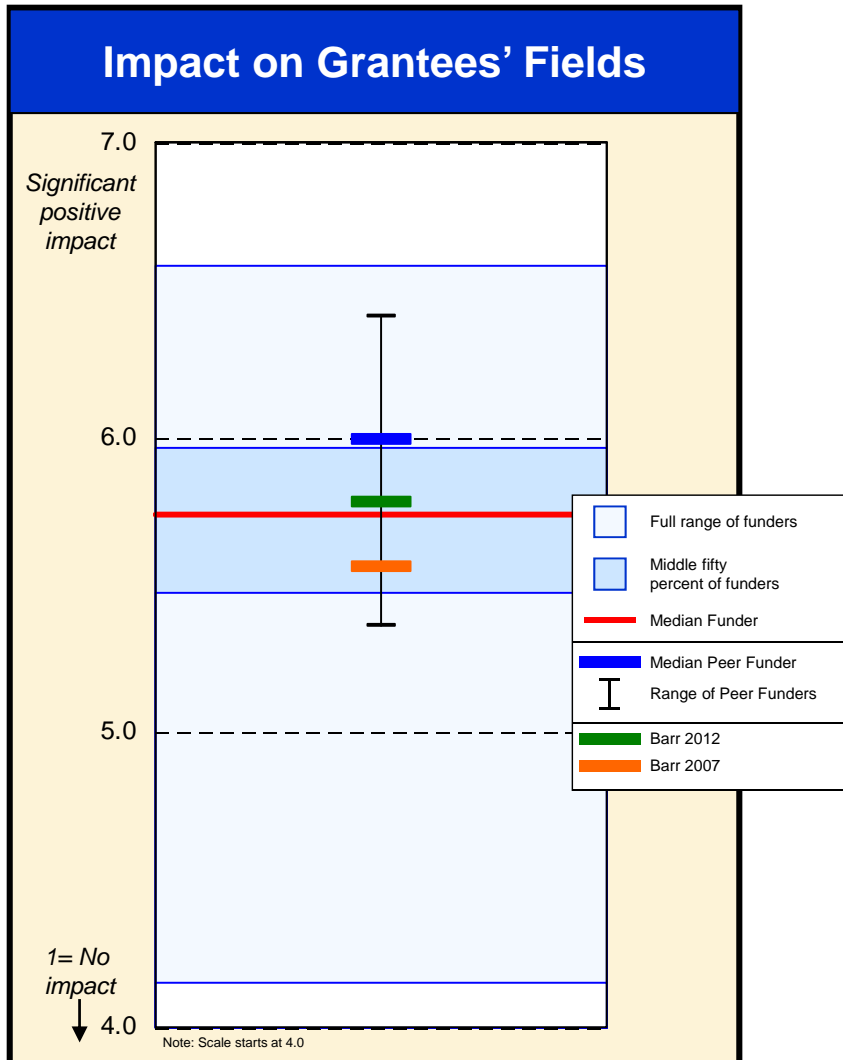
*“At this point in time, what is one word that best describes the Foundation?”*

Note: The size of each word indicates the frequency with which it was written by grantees. The most commonly mentioned words, “Generous,” and “Innovative,” were each mentioned by 6 grantees.





# Impact on Grantees' Fields

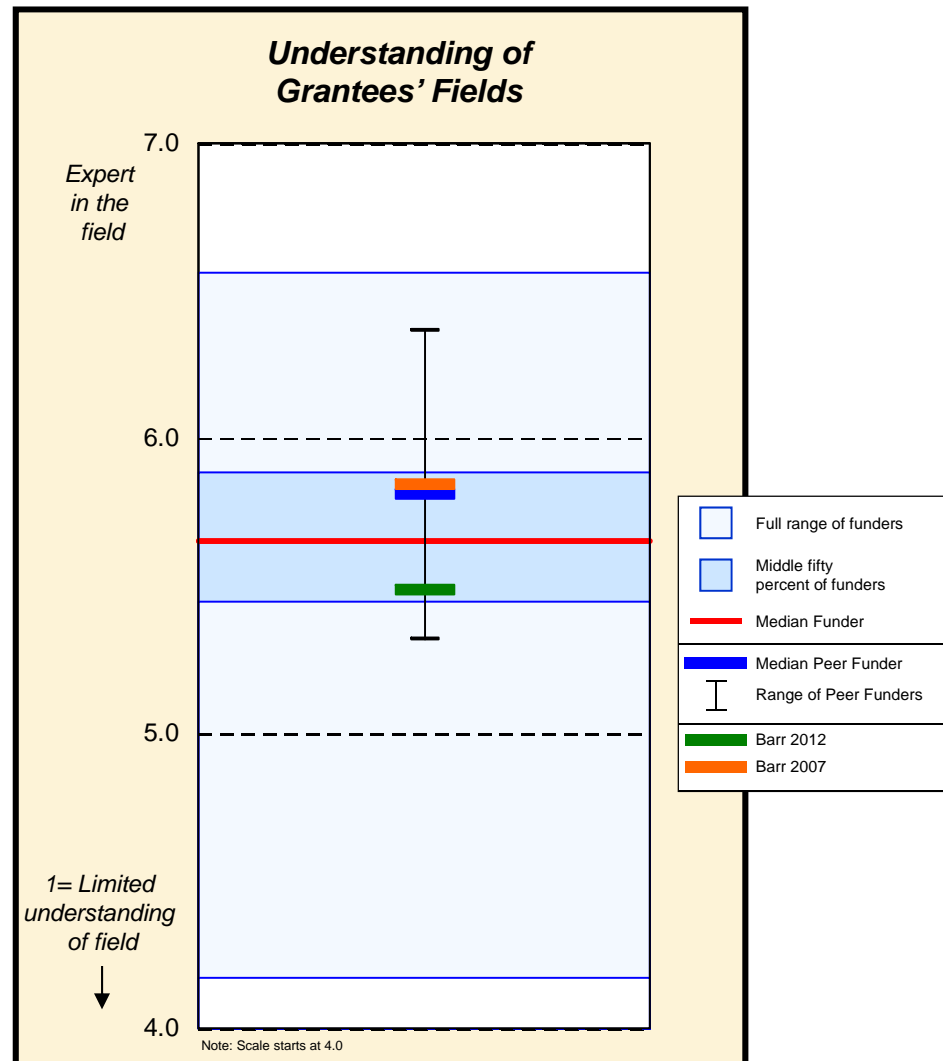


## Selected Grantee Comments

- ◆ *“Barr Foundation is unique in that it is actively researching, learning and acquiring knowledge about the field. We understand that Barr is going beyond what other foundations do to truly ‘know’ the field(s) that they choose to fund and support.”*
- ◆ *“Their exclusive focus on climate change issues, greatly reduces the groups and projects that are eligible, yet [other needs] still [remain].”*
- ◆ *“Barr has supported a wide range of projects in the area of climate change. Better strategic coordination, both before and after funding would be helpful.”*
- ◆ *“I don’t feel Barr is having any impact on our field anymore since of its guideline/priority/focus changes a few years ago. I do feel Barr had a significant and substantial impact while it was funding projects in our field.”*
- ◆ *“The Barr foundation plays a very critical role in funding cutting edge projects that help shape and move the field in the direction of more equity, equality and focus on underserved populations.”*

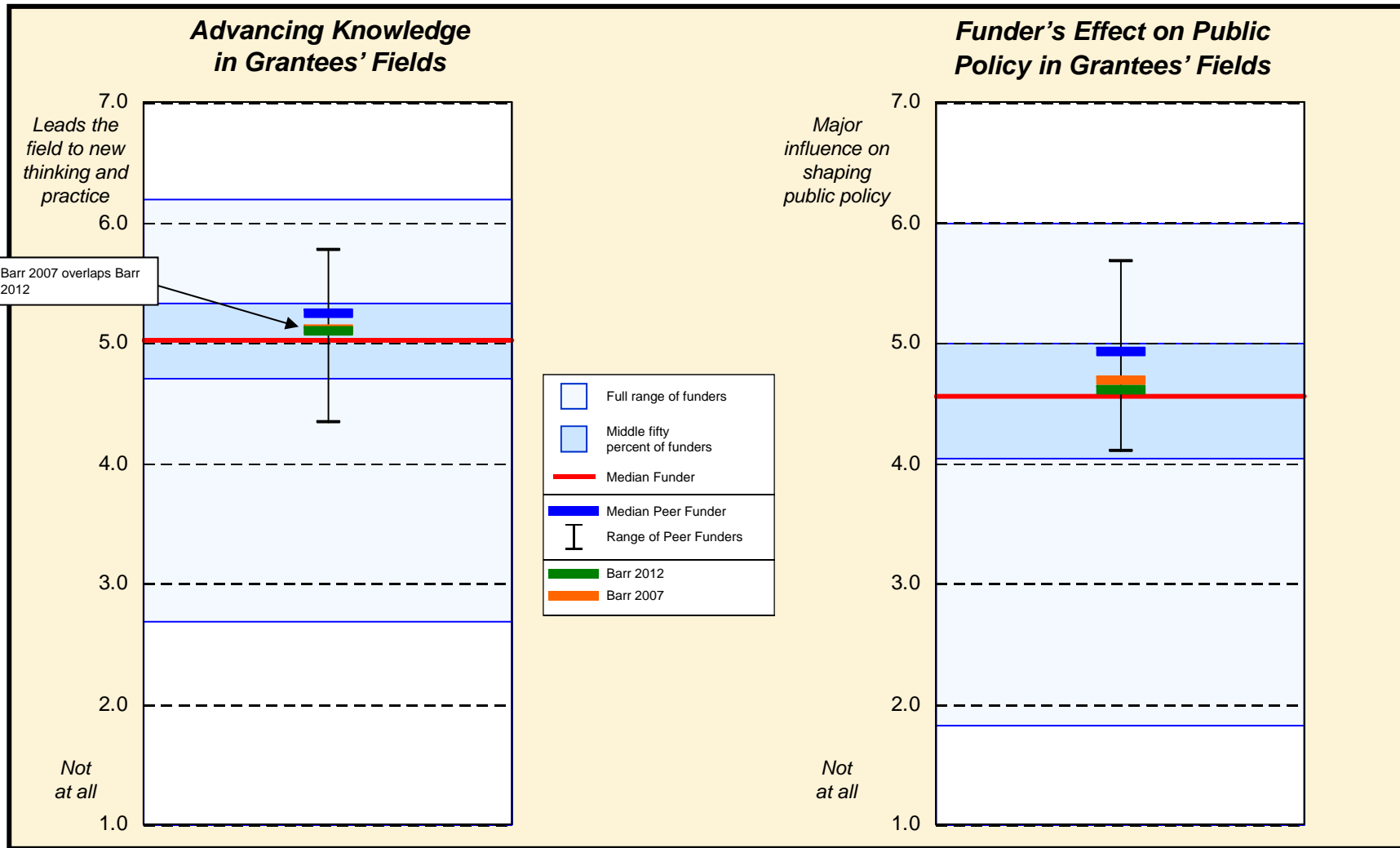
Note: This question includes a “don’t know” response option; 7 percent of Barr 2012 respondents answered “don’t know”, compared to 8 percent at the median funder, 10 percent of Barr 2007 respondents, and 6 percent of respondents at the median peer funder.

# Understanding of Grantees' Fields



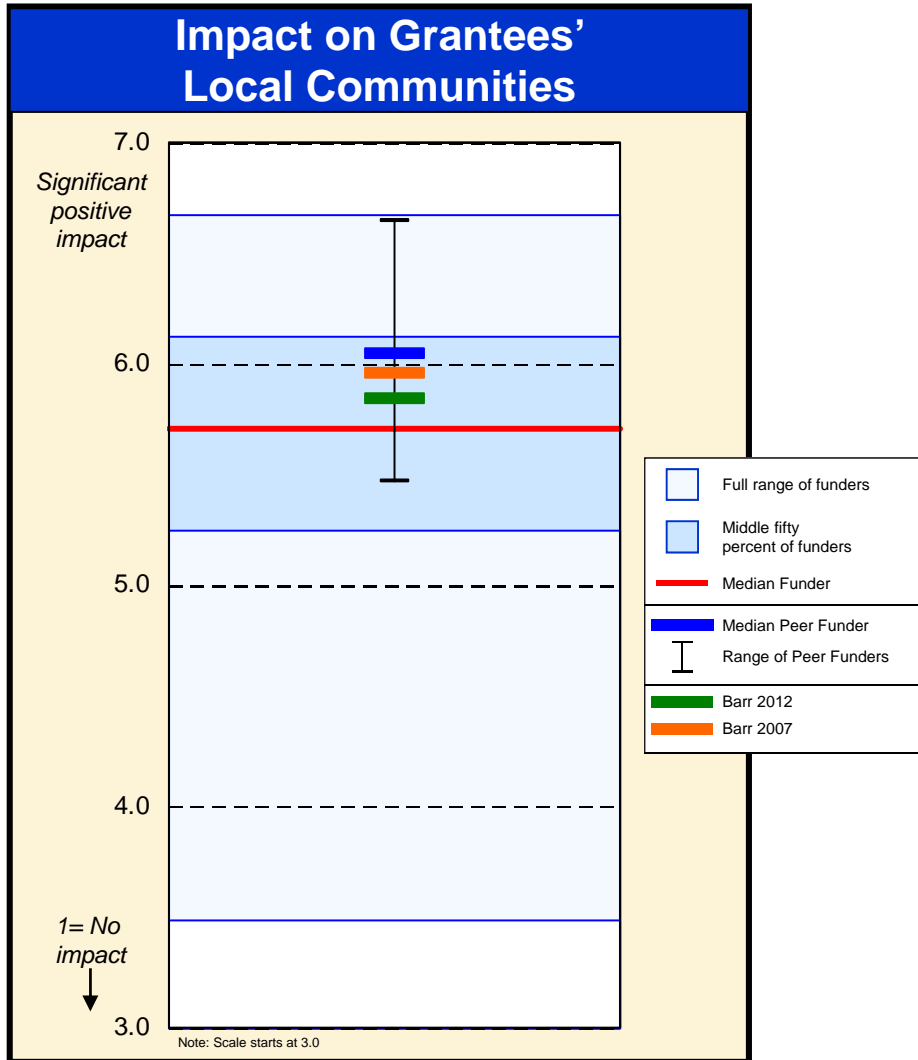
Note: This question includes a "don't know" response option; 8 percent of Barr 2012 respondents answered "don't know", compared to 6 percent at the median funder, 8 percent of Barr 2007 respondents, and 4 percent of respondents at the median peer funder.

# Advancing Knowledge in Fields and Effect on Public Policy



Note: The questions depicted on these charts include a "don't know" response option. In the left-hand chart, 13 percent of Barr 2012 respondents answered "don't know", compared to 23 percent at the median funder, 24 percent of Barr 2007 respondents, and 16 percent of respondents at the median peer funder. In the right-hand chart, 35 percent of Barr 2012 respondents answered "don't know", compared to 37 percent at the median funder, 40 percent of Barr 2007 respondents, and 31 percent of respondents at the median peer funder.

# Impact on Grantees' Local Communities

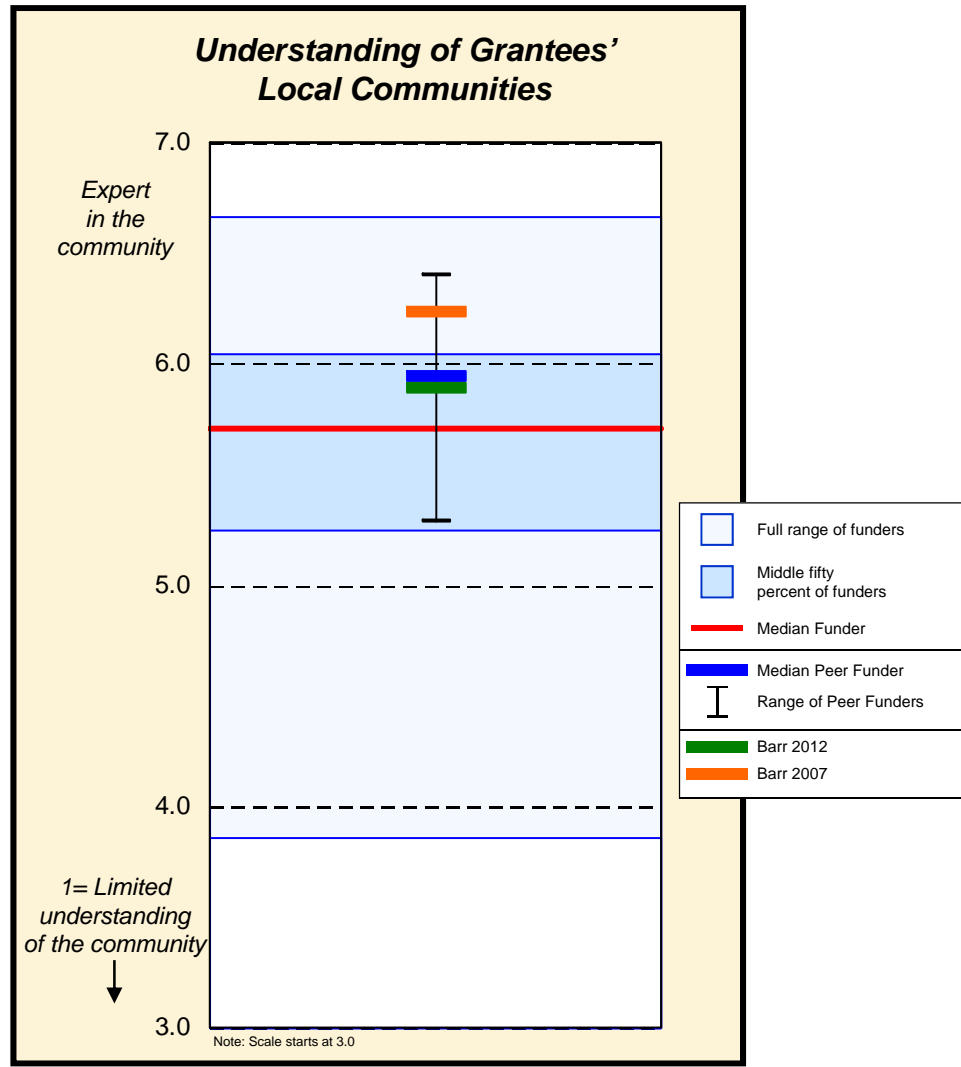


## Selected Grantee Comments

- ♦ *“Barr is an important catalyst in the city of Boston in particular providing critical funding to the key arts organizations.”*
- ♦ *“By moving resources away from areas that it has traditionally supported it can alter the balance of programming available for the various constituents that depend on the services that community organizations provide.”*
- ♦ *“Barr is deeply committed to positive change in Boston and to supporting the most disenfranchised.”*

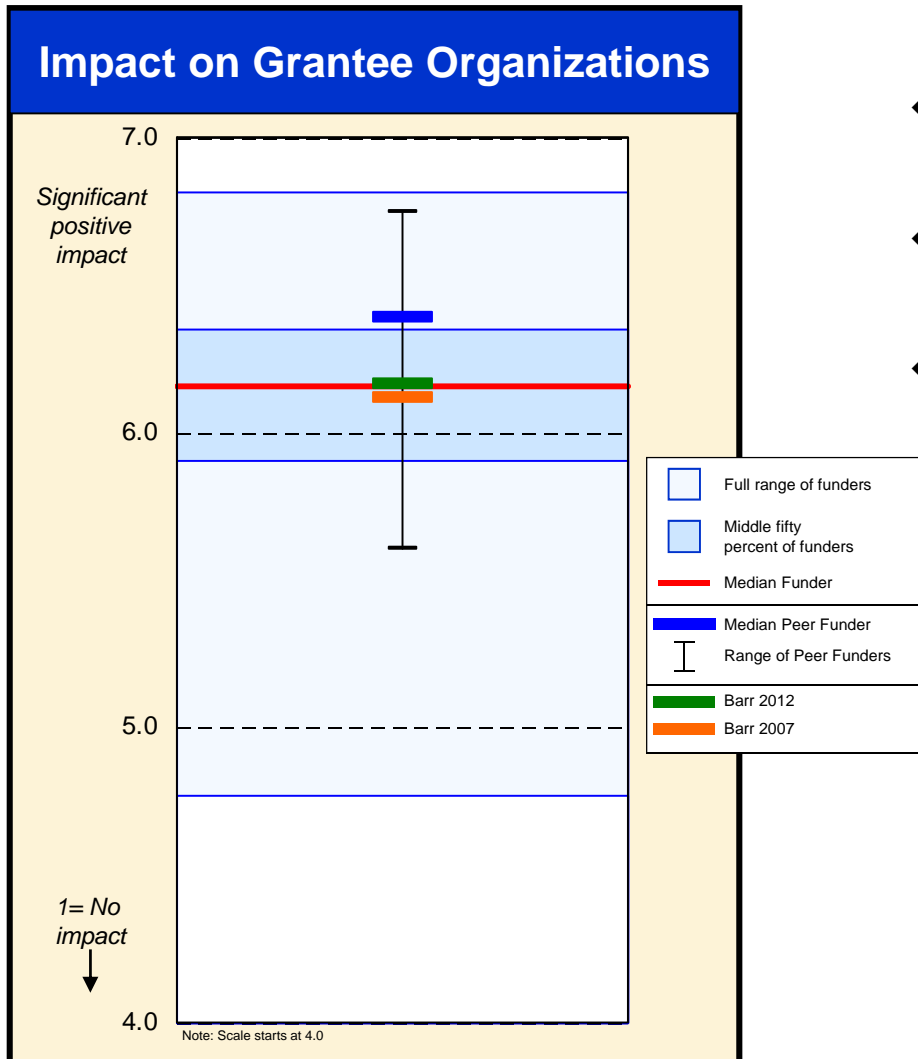
Note: This question includes a “don’t know” response option; 9 percent of Barr 2012 respondents answered “don’t know”, compared to 10 percent at the median funder, 9 percent of Barr 2007 respondents, and 9 percent of respondents at the median peer funder. Chart does not show data from two funders whose community impact rating is less than 3.0.

# Understanding of Grantees' Local Communities



Note: This question includes a "don't know/not applicable" response option; 9 percent of Barr 2012 respondents answered "don't know/not applicable", compared to 12 percent at the median funder, 5 percent of Barr 2007 respondents, and 8 percent of respondents at the median peer funder.

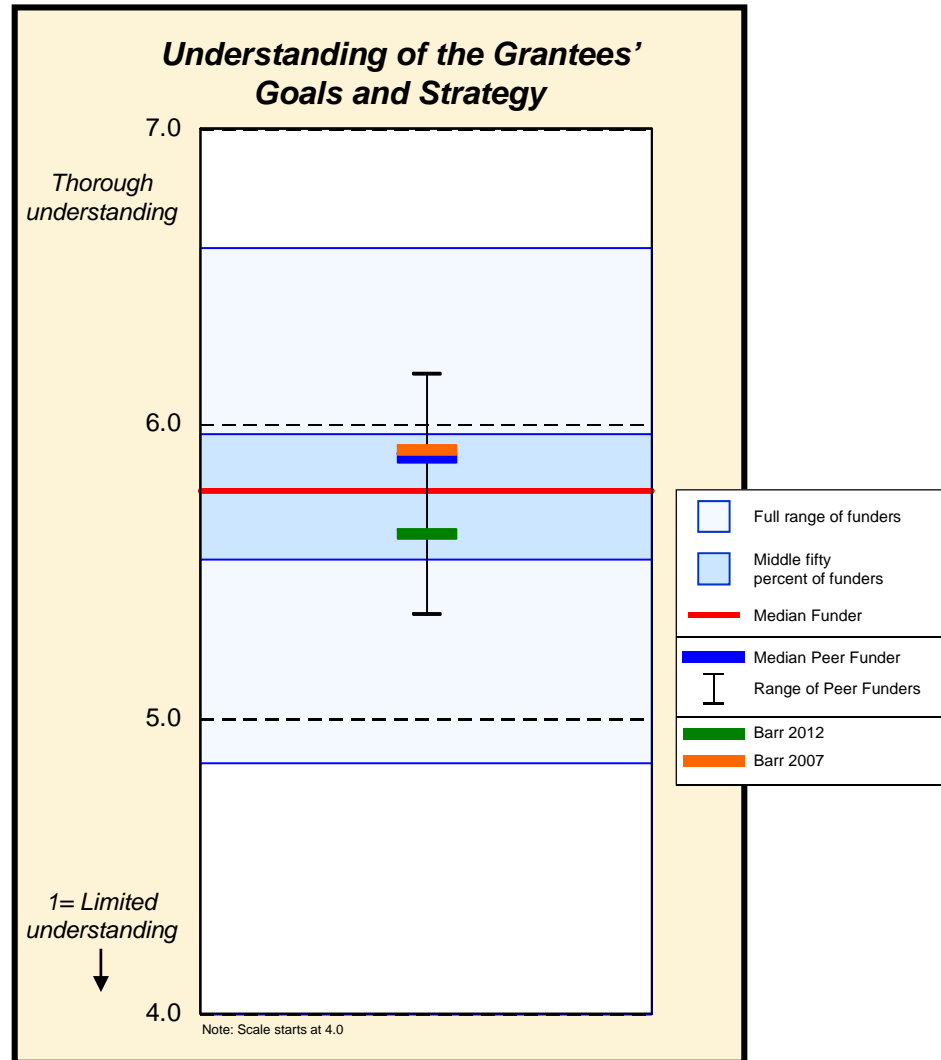
# Impact on Grantee Organizations



## Selected Grantee Comments

- ♦ *“Barr has been the largest and most consistent funder of our work. Through their support, they have driven [our agenda].”*
- ♦ *“Staff has worked to learn our work and then to connect us to other resources and networks important to the work.”*
- ♦ *“Barr uses its relationships and funds to bring people together to work on specific issues, including the one our project was about. Their clout helped pull folks together.”*

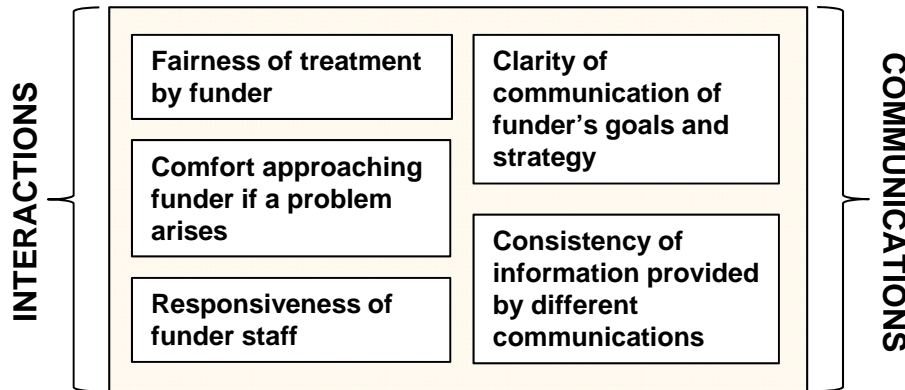
# Understanding of Grantees' Goals and Strategy



Note: This question includes a "don't know" response option; 8 percent of Barr 2012 respondents answered "don't know", compared to 6 percent at the median funder, 6 percent of Barr 2007 respondents, and 5 percent of respondents at the median peer funder.

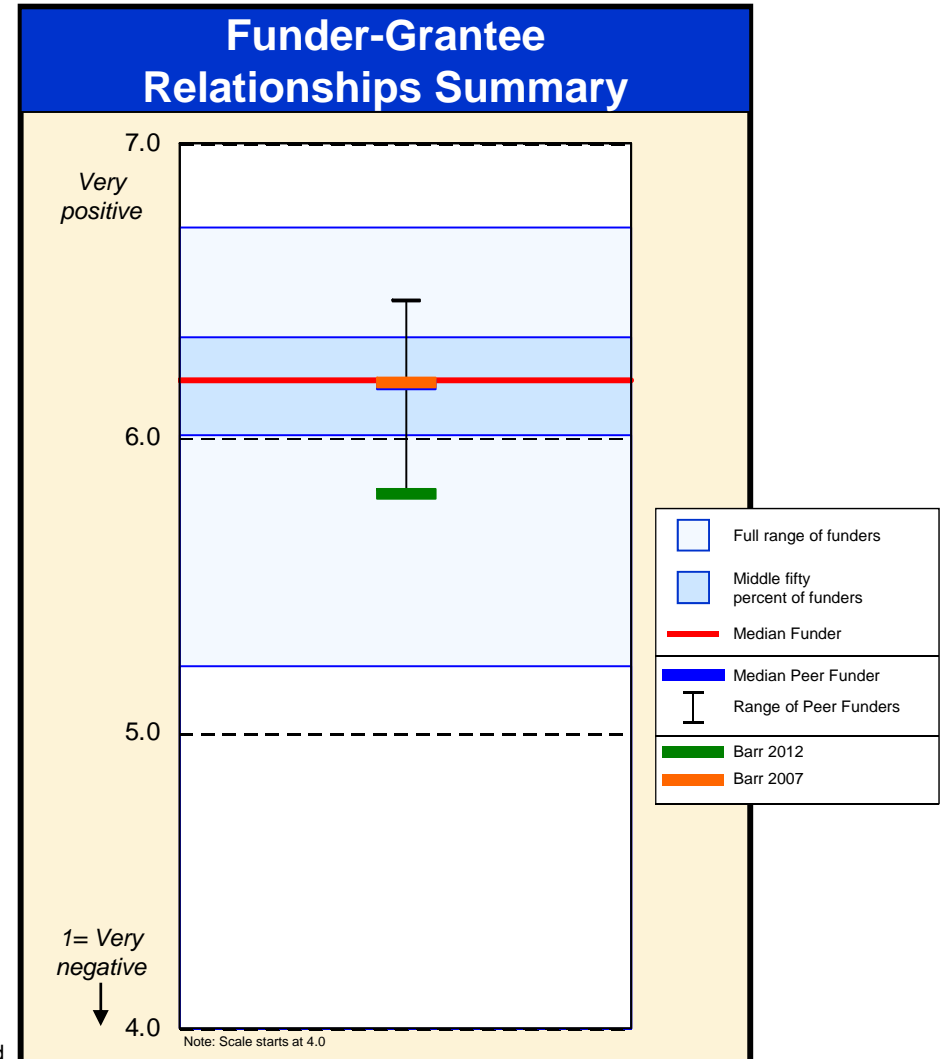
# Funder-Grantee Relationships Summary

## Key Components of Funder-Grantee Relationships Measure



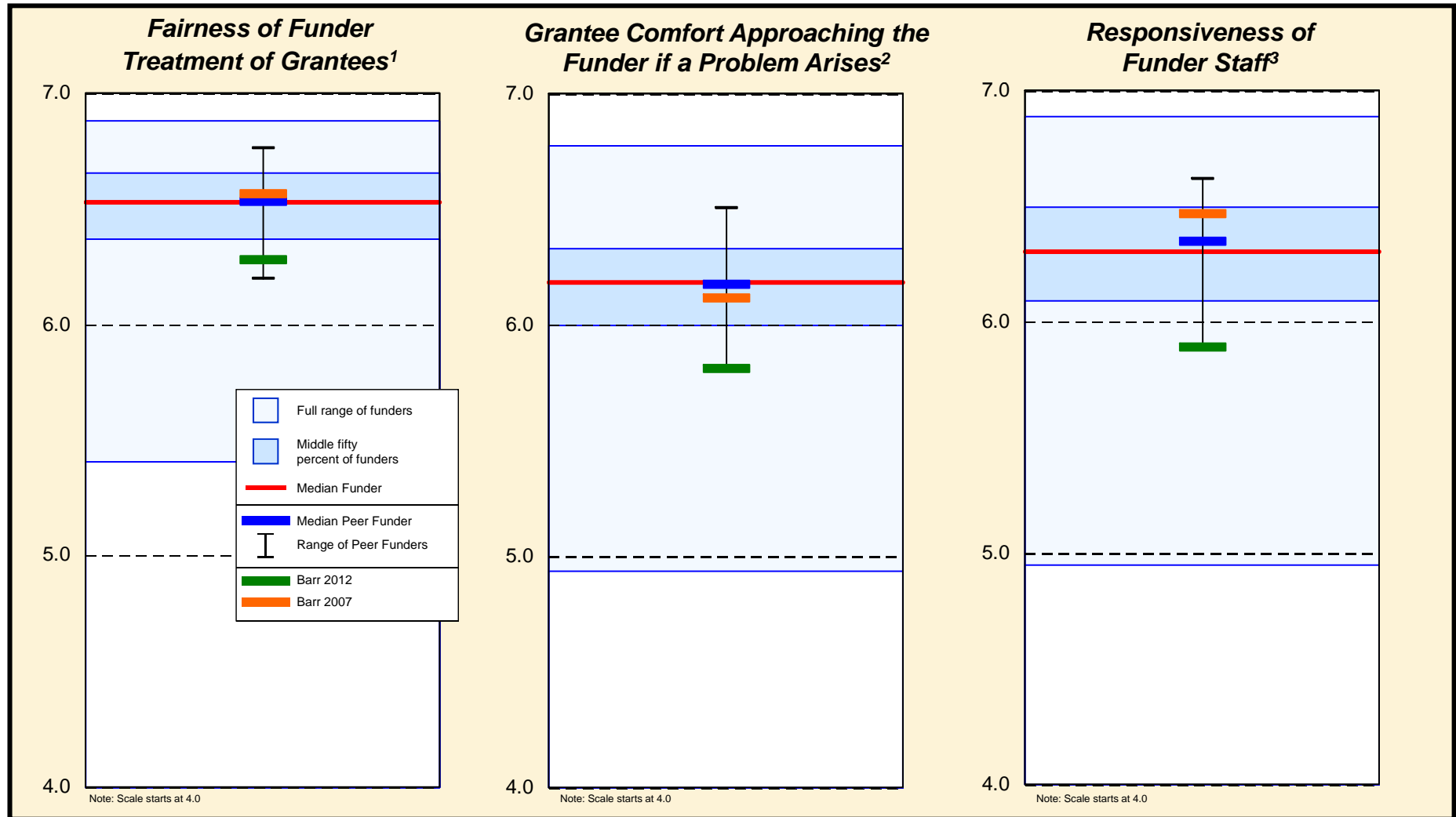
Survey-Wide Analysis Fact: What best predicts grantee ratings on the *Funder-Grantee Relationships Summary*? 1) *Understanding*: Understanding of funded organizations' goals and strategies; 2) *Selection*: Helpfulness of selection process and mitigation of pressure to modify priorities; 3) *Expertise*: Understanding of fields and communities; 4) *Contact*: Initiation of contact and with appropriate frequency. For more on these findings and resulting management implications, please see CEP's report, *Working with Grantees: The Keys to Success and Five Program Officers Who Exemplify Them*.

Note: Index created by averaging grantee ratings of comfort approaching the Foundation if a problem arises, responsiveness of the Foundation staff, fairness of the Foundation's treatment of grantees, clarity of communication of the Foundation's goals and strategy, and the consistency of information provided by different communication resources. The data above reflects only the responses of grantees who answered all five of these questions.





# Interactions Measures

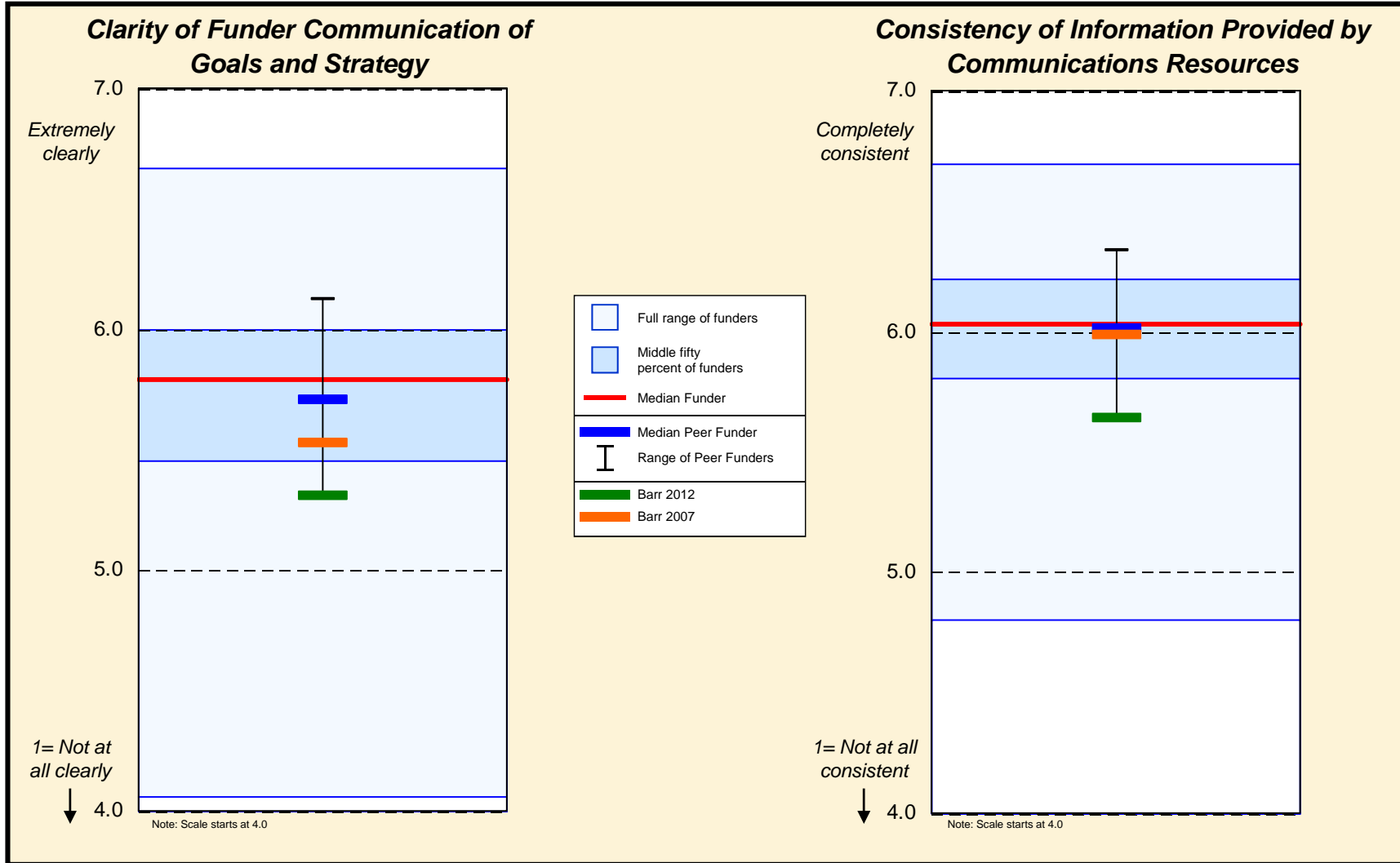


1: Scale goes from 1 = Not at all fairly to 7 = Extremely fairly.

2: Scale goes from 1 = Not at all comfortable to 7 = Extremely comfortable.

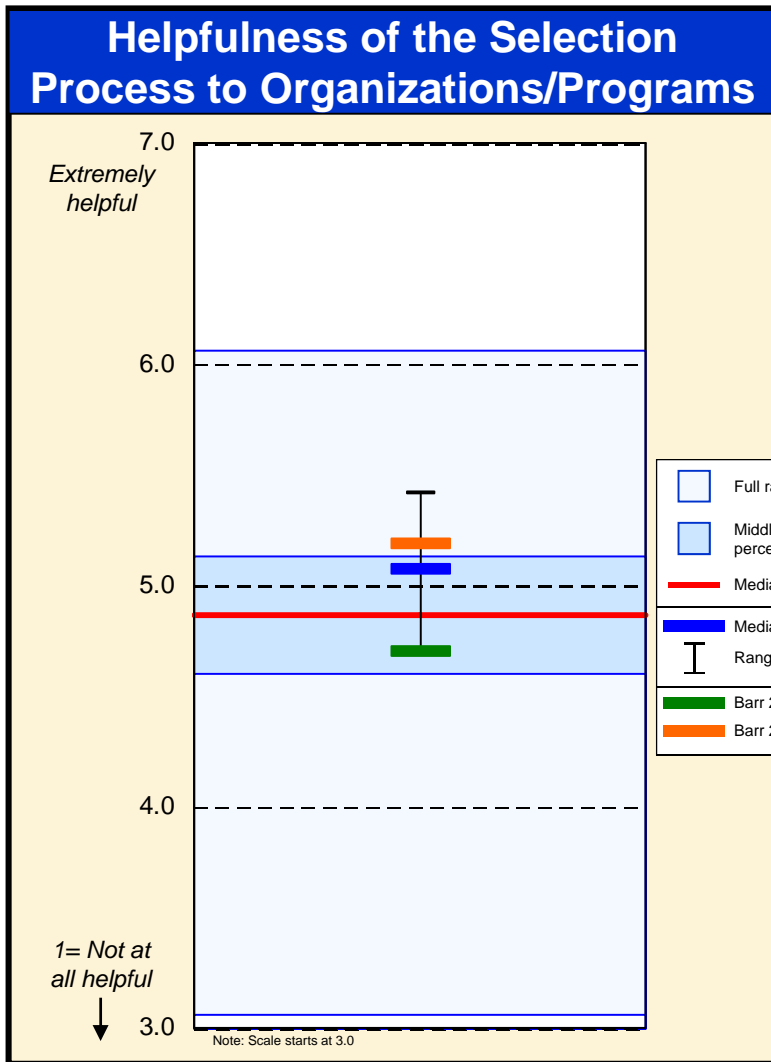
3: Scale goes from 1 = Not at all responsive to 7 = Extremely responsive.

# Communications Measures



Note: In the right-hand chart, this question includes a “used one or no resources” response option; 2 percent of Barr 2012 respondents indicated they had used one or no resources, compared to 4 percent at the median funder, 10 percent of Barr 2007 respondents, and 4 percent of respondents at the median peer funder.

# Helpfulness of Selection Process



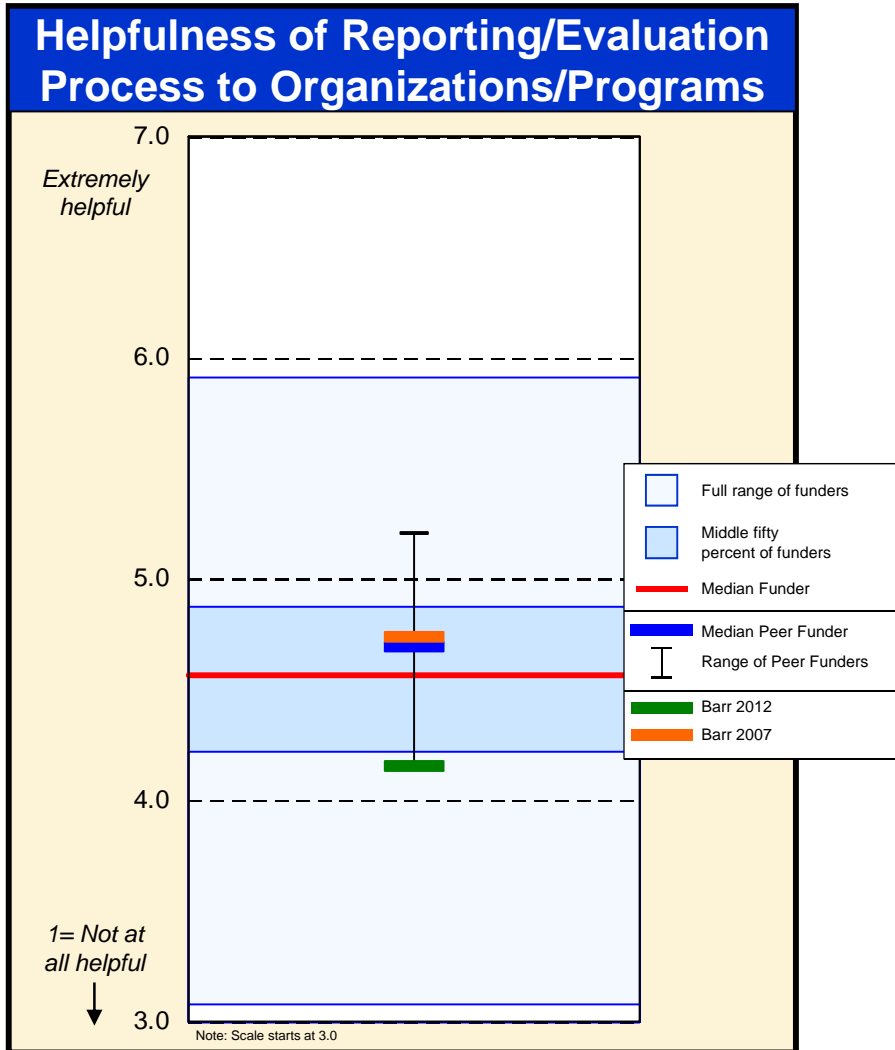
## Selected Grantee Comments

- ◆ *“The grant process with Barr is very clear. The first step of creating a concept paper is very helpful. It provides a useful process for clarifying what the Foundation will fund and to strategically align our work with Barr’s strategic plan.”*
- ◆ *“The process is fair and equitable. The staff is very responsive if you have issues and very helpful during the writing process and in helping to figure out if your program fits within their guidelines.”*

*“We felt very well served - and heard - by the Barr Foundation during this process, both in its initial development and once the guidelines were established and the actual grant application process had begun.”*

*“Working with the program officer was very helpful in helping us frame our request and to think through what we were trying to accomplish.”*

# Helpfulness of Reporting and Evaluation Processes



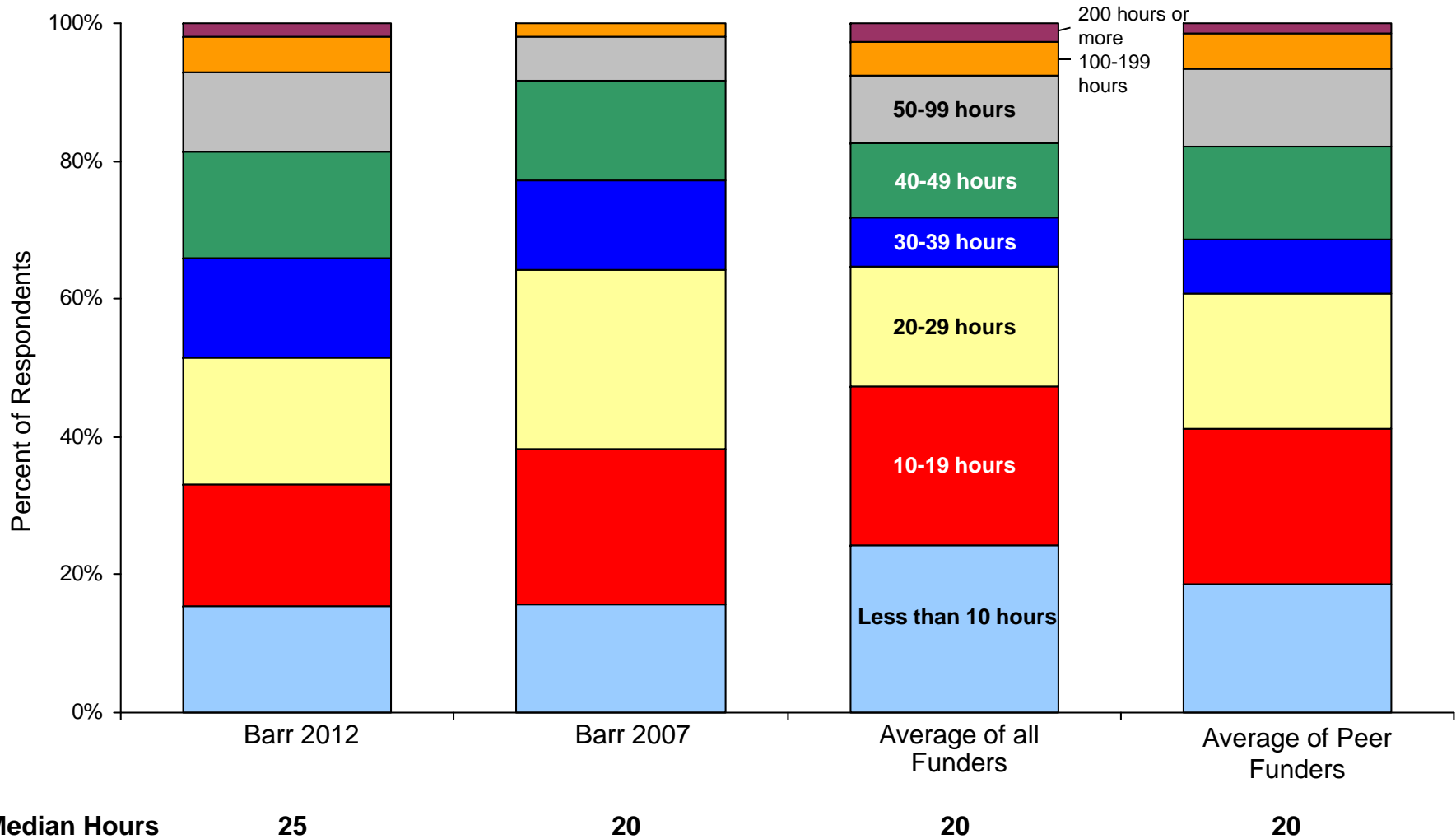
## Selected Grantee Comments

- ♦ “[Regularly] we had meetings to do follow up in our projects and report on what we were working on. The foundation and our coalition had a very good communication individually, by phone and a lots of meeting.”
- ♦ “The reporting process is straightforward, and we appreciate that the report is concise.”
- ♦ “Because Barr was transitioning their Arts & Culture grantmaking, the process was very vague and unclear.”
- ♦ “The processes for submitting our proposal and subsequent reports were clear and reasonable, as were all communications with staff.”

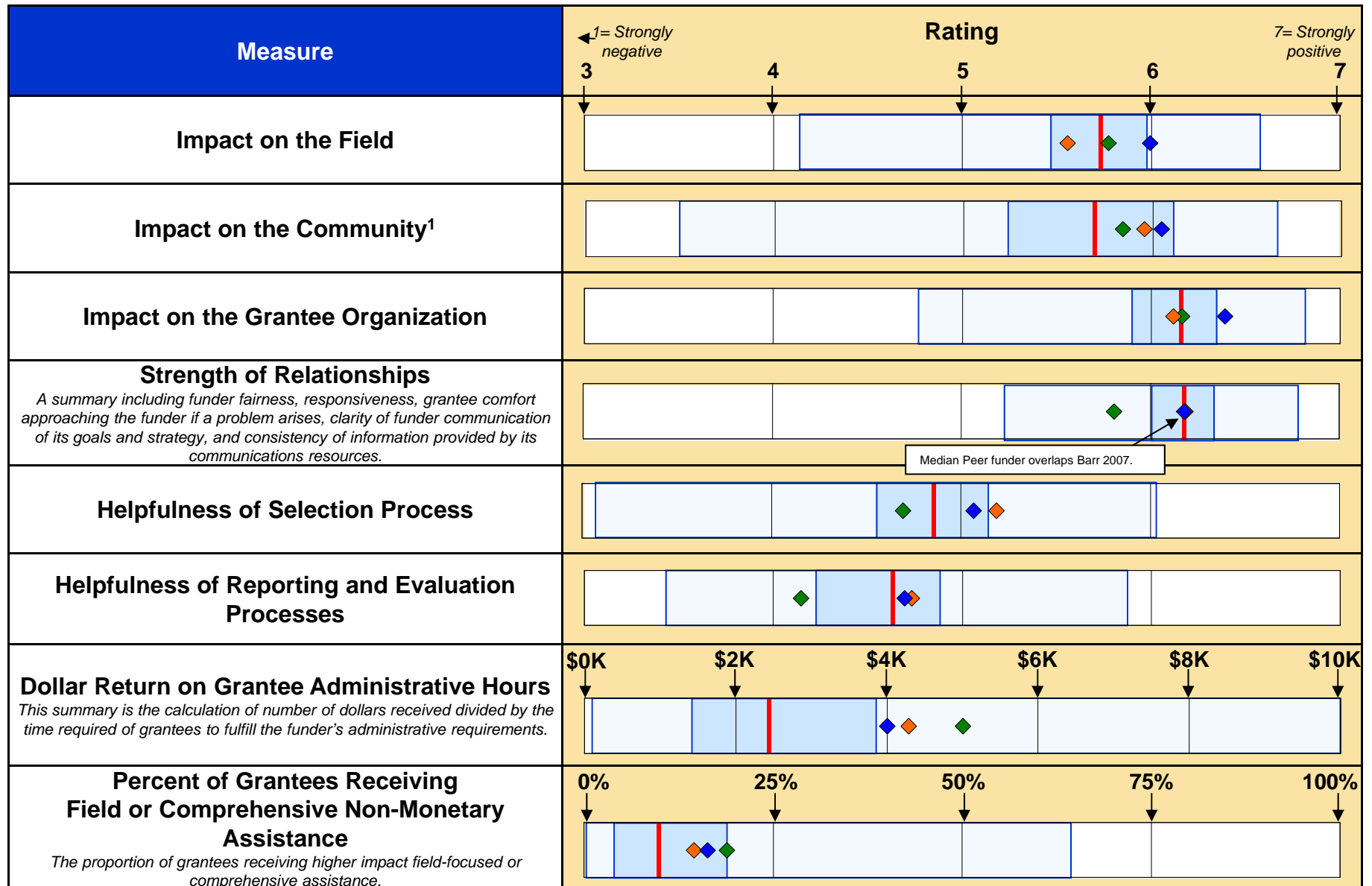
Note: This question was only asked of those grantees that had participated in a reporting or evaluation process by the time they took the survey. For Barr 2012, 66 percent of grantees indicated that they had participated in a reporting or evaluation process by the time they took the survey, compared to 61 percent at the median funder, 67 percent of Barr 2007 respondents, and 58 percent of respondents at the median peer funder.

# Administrative Time – Proposal and Selection Process

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



# Review of Findings



1: Chart does not show data from two funders whose community impact rating is less than 3.0.

# Contact Information

- ◆ This report was produced for Barr Foundation by the Center for Effective Philanthropy in December 2012.
  
- ◆ Please contact CEP if you have any questions:
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