

CONFIDENTIAL

Grantee Perception Report®

prepared for

The Rhode Island Foundation

May 2010



THE CENTER FOR
EFFECTIVE PHILANTHROPY

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Executive Summary – Key Findings

The Rhode Island Foundation (“RIF”) receives high ratings on many aspects of its Grantee Perception Report compared to other funders whose grantees the Center for Effective Philanthropy has surveyed and compared to other community foundations. The Foundation’s ratings have improved – often dramatically – since RIF’s 2003 and 2008 reports in many areas, including on perceptions of impact, measures related to aspects of the grantee experience, and the helpfulness of its administrative processes. Grantees frequently provide positive comments about the Foundation, describing RIF as “top notch in every way,” “professional,” and “refreshing.”

2010 GPR ratings show statistically significant improvement since 2008 GPR ratings. RIF is rated significantly higher than it was in 2008 by grantees across most measures of the report, including its impact on and understanding of grantees’ fields, its understanding of grantees’ local communities, its impact on grantees’ organizations, its understanding of grantees’ goals and strategy, overall satisfaction, quality of interactions, clarity of communications of grantees’ goals and strategy, consistency of communication resources, and helpfulness of the selection and reporting/evaluation processes to grantees. Additionally, a greater than typical proportion of RIF grantees report that they are more satisfied with the Foundation this year than last year compared to the average foundation and the average community foundation.

The Foundation’s selection process received particular praise from grantees. 2010 grantees experienced a dramatic decrease in the time elapsed between submission of their proposal and clear commitment of funding compared to 2008 grantees. They also express excitement regarding the rolling admission process, calling it “a great improvement.”

Despite improvements to RIF’s impact on grantees’ organizations, room for further progress exists to help grantees’ improve the sustainability of their work. RIF’s ratings on the effect of its funding on grantees’ ability to sustain their work in the future improved over ratings of 2008 grantees, however, the Foundation is rated below the median funder and similarly to the median community foundation. RIF grantees report receiving smaller and shorter grants than typical, although they are larger and longer than grants of the median community foundation. A greater proportion of grantees report that their grant was used to add new program work. RIF grantees who indicate that their grant was used to add new program work rate significantly lower than grantees who indicate their grant was used to enhance capacity on the measure of the Foundation’s impact on their organizations.

A smaller proportion of RIF grantees report receiving non-monetary assistance from the Foundation than is typical. Additionally the proportion of RIF grantees that report receiving the kind of intensive assistance that really seems to make a difference to grantees is smaller than typical. RIF grantees receiving these patterns of assistance rate the Foundation significantly higher across measures of the report, including overall satisfaction, quality of interactions, and impact on grantees’ fields and communities. In particular, one grantee suggests, like others, that the Foundation could play a larger role in “promoting and facilitating partnerships.”

Grantees report some differences in their experience with the Foundation by grant type and year. Across most measures of the survey, strategy grantees rate the Foundation higher than grantees in most other grant programs, with the exception of proactive by sector grantees. Additionally, grantees receiving funding in 2008 rate the Foundation lower than grantees funded in 2009.

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Background

- ♦ Since February 2003, the Center for Effective Philanthropy (CEP) has conducted surveys of grantees on their perceptions of their philanthropic funders both on behalf of individual funders and independently. The purpose of these surveys is two-fold: to gather data that is useful to individual funders and to form the basis for broadly applicable research reports.¹

- ♦ **The Grantee Perception Report® (GPR) shows an individual philanthropic funder its grantee perceptions relative to a set of perceptions of other funders whose grantees were surveyed by CEP.**
 - Assessing funder performance is challenging and a range of data sources is required. The GPR provides one set of perspectives that can be useful in understanding philanthropic funder performance.
 - It is important to note that, on most questions, grantee ratings cluster toward the high end of an absolute scale. Grantee perceptions must be interpreted in light of the particular strategy of the funder.
 - The survey covers many areas in which grantees' perceptions might be useful to a philanthropic funder. Each funder should place emphasis on the areas covered according to the funder's specific priorities.
 - Low ratings in an area that is not core to a philanthropic funder's strategy may not be concerning. For example, a funder that does not focus efforts on public policy would likely receive lower than average ratings in this area if it is adhering to its strategy.
 - Finally, across most measures in this report, structural characteristics – such as funder type, asset size, focus, and age – are not strong predictors of grantee perceptions, suggesting that it is possible for all funders to attain high ratings from grantees.

Methodology – The Foundation’s Grantee Survey

- ♦ The Center for Effective Philanthropy (CEP) surveyed the grantees of The Rhode Island Foundation (“RIF”) during February and March 2010. CEP has surveyed RIF’s grantees in the past. Where possible, ratings from these surveys are also shown in the report. The details of RIF’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
RIF 2010	February and March 2010	2008 and 2009	198	124	63%
RIF 2008	February and March 2008	2007	88	60	68%
RIF 2003	February and March 2003	2002	151	74	49%

- ♦ In addition to showing RIF’s overall ratings, this report also shows RIF’s ratings segmented by the grantees’ Type of Grant. The number of respondents in each group is as follows:

Type of Grant ²	Respondents
Strategy Grants	82
Other Grant Types	39

- ♦ 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.

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

Methodology – Comparative Data

- ♦ RIF’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

- ♦ RIF is also compared to a cohort of 16 community foundations. The 16 foundations that comprise this group are:

Community Foundations	
Boston Foundation, Inc.	Kalamazoo Community Foundation
The Chicago Community Trust	Maine Community Foundation
East Bay Community Foundation	The Minneapolis Foundation
The Erie Community Foundation	The New Hampshire Charitable Foundation
Grand Rapids Community Foundation	The Pittsburgh Foundation
The Greater Cincinnati Foundation	The Rhode Island Foundation
Gulf Coast Community Foundation of Venice	The Saint Paul Foundation Inc.
Hartford Foundation for Public Giving	Vancouver Foundation

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, RIF tends to provide smaller and shorter grants. The Foundation also tends to provide a smaller than typical proportion of its grantees with operating support. Relative to other community foundations, RIF's grant characteristics are typical.

Survey Item	RIF 2010	RIF 2008	RIF 2003	Full Dataset Median	Community Foundation Median
Grant Size					
Median grant size	\$40K	\$40K	\$45K	\$60K	\$35K
Grant Length					
Average grant length	1.5 years	1.3 years	1.3 years	2.1 years	1.5 years
Percent of grantees receiving multi-year grants	27%	19%	21%	49%	33%
Type of Support					
Percent of grantees receiving operating support	6%	5%	N/A	19%	10%
Percent of grantees receiving program/project support	73%	75%	N/A	65%	71%
Percent of grantees receiving other types of support	21%	20%	N/A	16%	19%

Note: RIF 2003 data on "type of support" not available due to changes to the survey instrument.

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.

Structural Characteristics of Grantees

- This table is intended to provide context to the Foundation in thinking about its GPR results relative to the demographic makeup 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, RIF grantees tend to be smaller organizations, although similar to grantees of other community foundations.

Survey Item	RIF 2010	RIF 2008	RIF 2003	Full Dataset Median	Community Foundation Median
Budget of Funded Organizations					
Typical organizational budget	\$0.8MM	\$1.0MM	\$0.8MM	\$1.4MM	\$0.8MM
Duration of Funded Program and Grantee Organization					
Programs conducted 6 years or more ¹	19%	9%	N/A	33%	28%
Median length of establishment of grantee organizations	18 years	21 years	N/A	24 years	21 years
First-Time Grantees²					
Percentage of first-time grants	17%	N/A	N/A	34%	N/A

1: Represents data from 87 funders.

2: Represents data from 16 funders.

Note: RIF 2003 data on duration of funded program and grantee organization and RIF 2003, RIF 2008, and Community Foundation Median data on first-time grantees 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 part B of the Appendix.

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 professional program staff full-time employee at RIF is larger than that of the typical funder and typical community foundation.

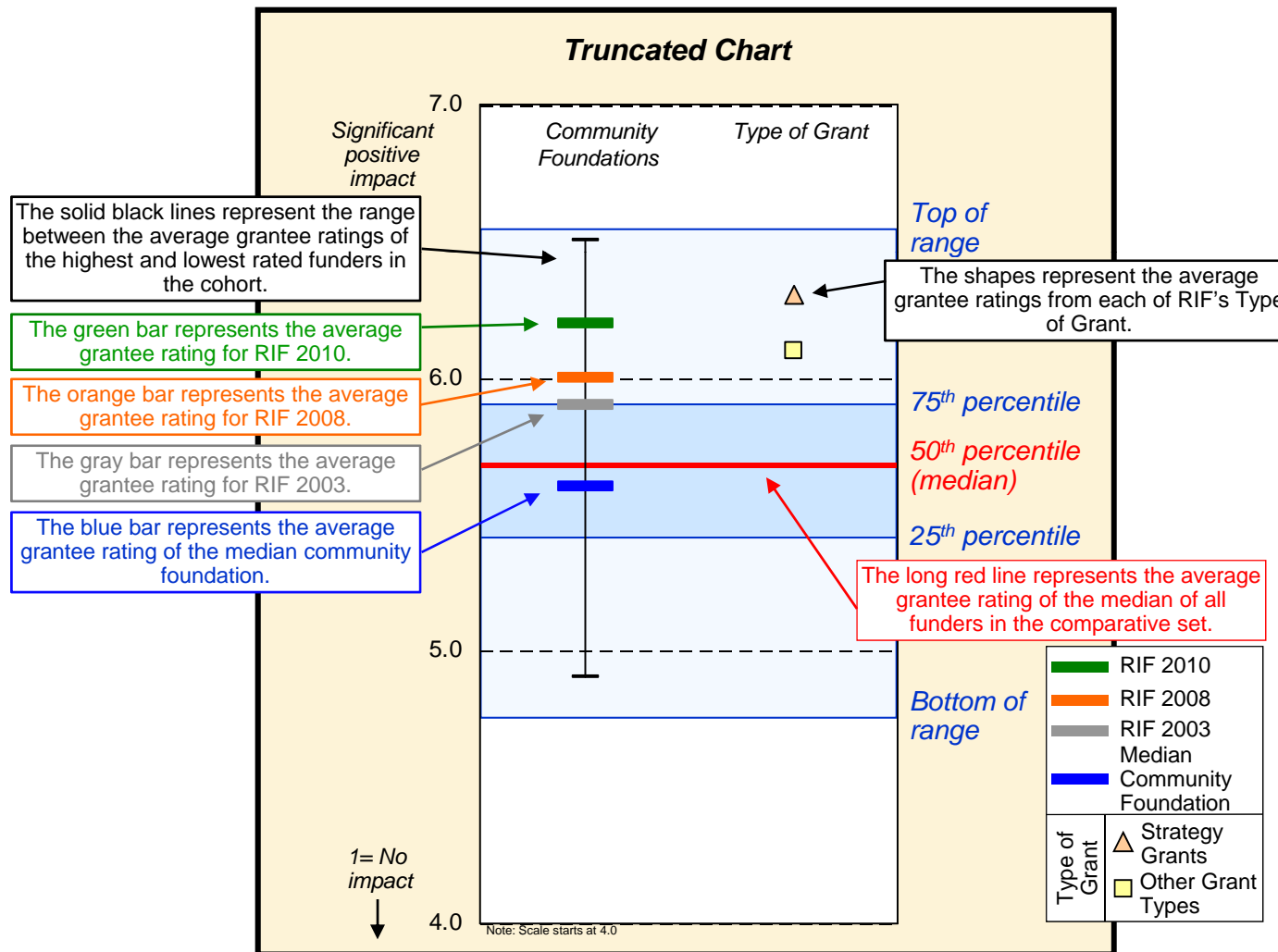
Survey Item	RIF 2010	RIF 2008	RIF 2003	Full Dataset Median	Community Foundation Median
Program Staff Load					
Dollars awarded per professional program staff full-time employee	\$2.8MM	\$2.2MM	\$2.0MM	\$3.6MM	\$3.4MM
Applications per professional program full-time employee	134 applications	N/A	19 applications	38 applications	44 applications
Active grants per professional program full-time employee	65 grants	64 grants	N/A	50 grants	39 grants

Note: Some RIF 2003 and 2008 data on staff load not available.

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, please refer to part B of the Appendix.

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 RIF, over a background that shows percentiles for the average ratings for the full comparative set of 251 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.**



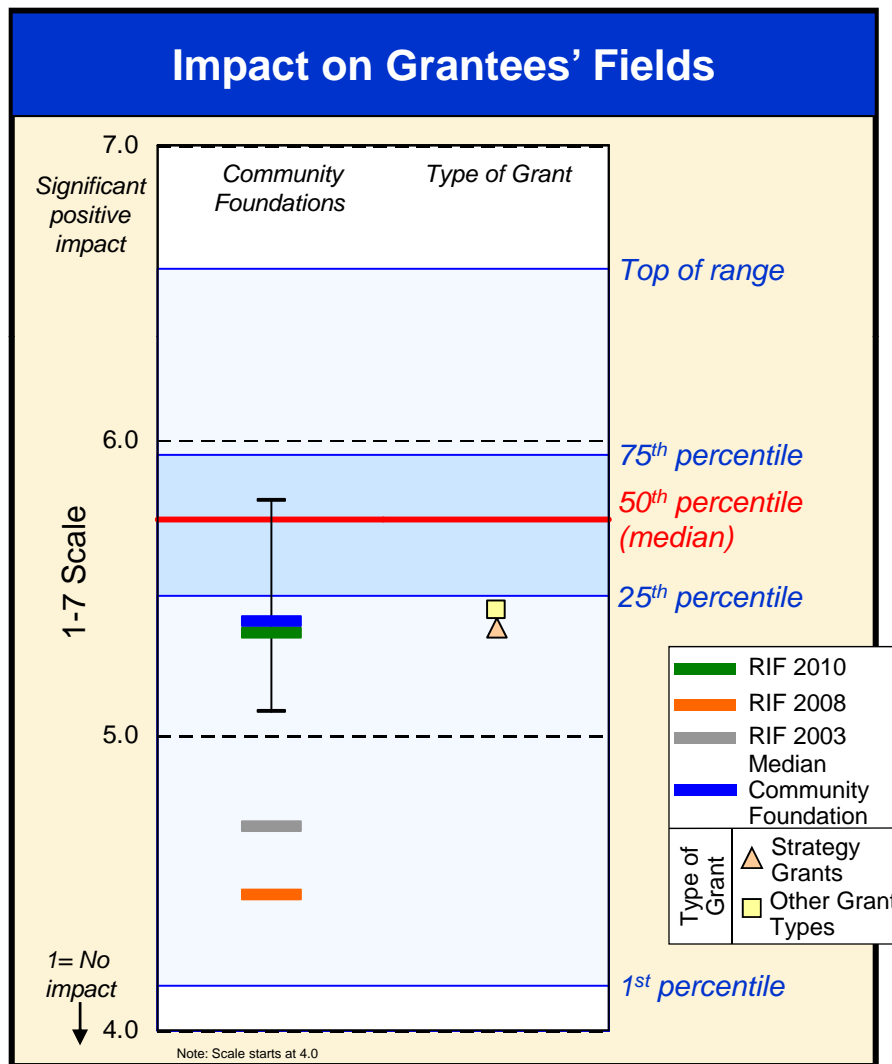
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Impact on Grantees' Fields

On impact on grantees' fields, RIF is rated:

- below the median funder
- similarly to the median community foundation



Selected Grantee Comments

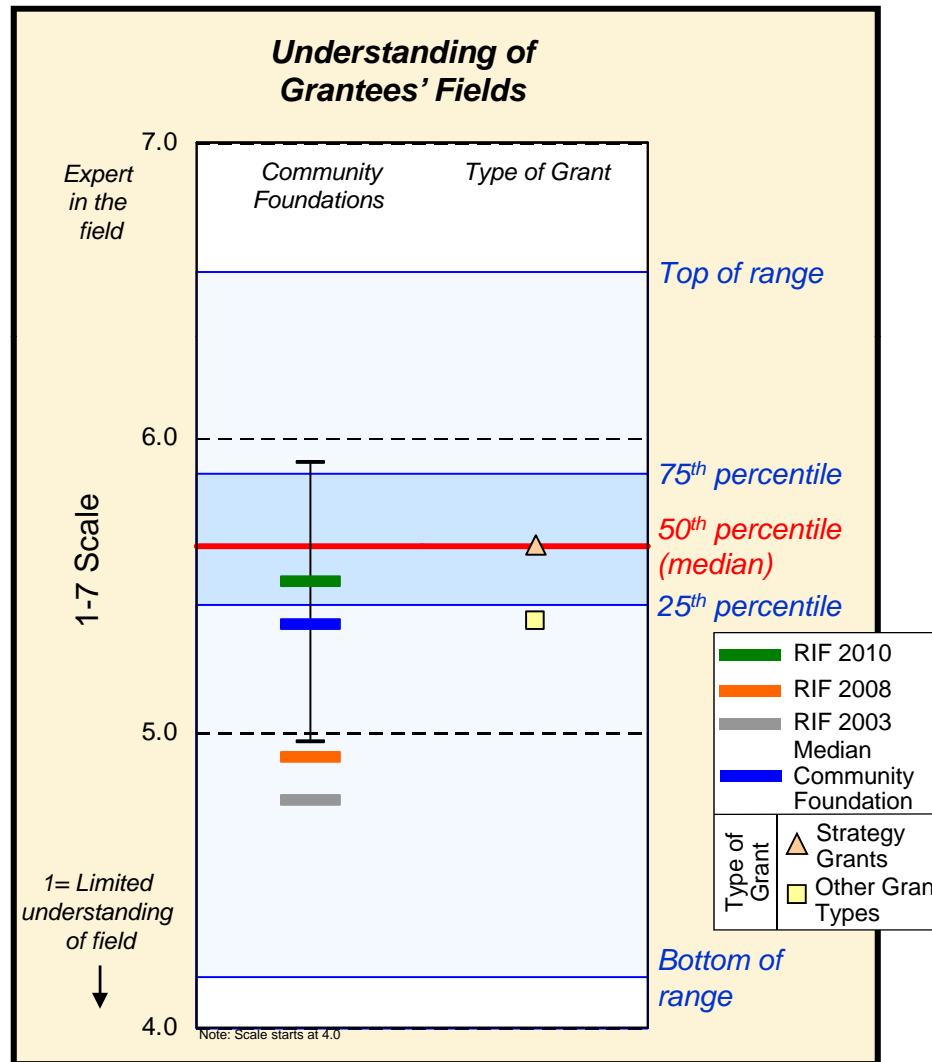
- ♦ “RIF is taking a leadership role in health and education policy. It is stepping into a facilitator role in both of these areas to help move the ball on complicated policy issues. It is seen as neutral...with committed, well informed professionals that bring value to the policy work.”
- ♦ “The Foundation’s attempts at advancing the knowledge of the field is unfortunately viewed with sour eyes from the field – in that most feel the Foundation doesn’t understand them or take the time to understand them.”
- ♦ “If the Foundation is truly committed to systemic change in the youth development field it should continue with multi-year funding similar to what happened in Providence. Systemic change does not happen overnight.”
- ♦ “It is terrific that there is dedicated funding for animal welfare issues – less terrific that it is so skewed in favor of the spay/neuter initiative and that there is inconsistent support for innovative programs.”

Note: This question includes a “don’t know” response option; 3 percent of RIF 2010 respondents answered “don’t know,” compared to 9 percent at the median funder, 5 percent of RIF 2008 respondents, 12 percent of RIF 2003 respondents, and 7 percent of respondents at the median community foundation. Chart does not show data from one funder whose field impact rating is less than 4.0.

Understanding of Grantees' Fields

On understanding of grantees' fields, RIF is rated:

- similarly to the median funder
- above the median community foundation



Note: This question includes a "don't know" response option; 2 percent of RIF 2010 respondents answered "don't know," compared to 7 percent at the median funder, 2 percent of RIF 2008 respondents, 6 percent of RIF 2003 respondents, and 7 percent of respondents at the median community foundation. **CONFIDENTIAL** | © The Center for Effective Philanthropy | 6/25/2010

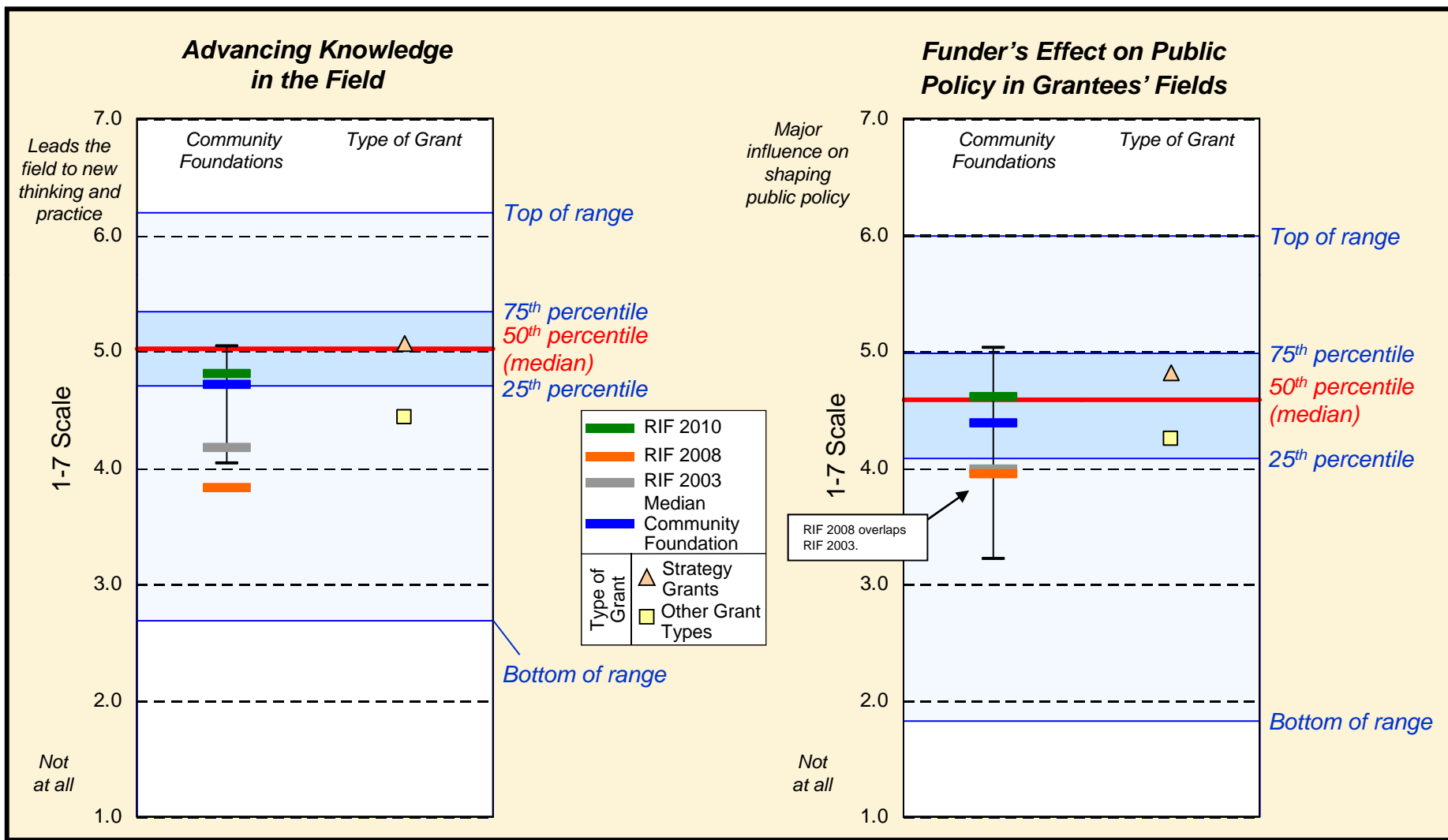
Advancing Knowledge in Fields and Effect on Public Policy

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

- similarly to the median funder
- similarly to the median community foundation

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

- similarly to the median funder
- similarly to the median community foundation

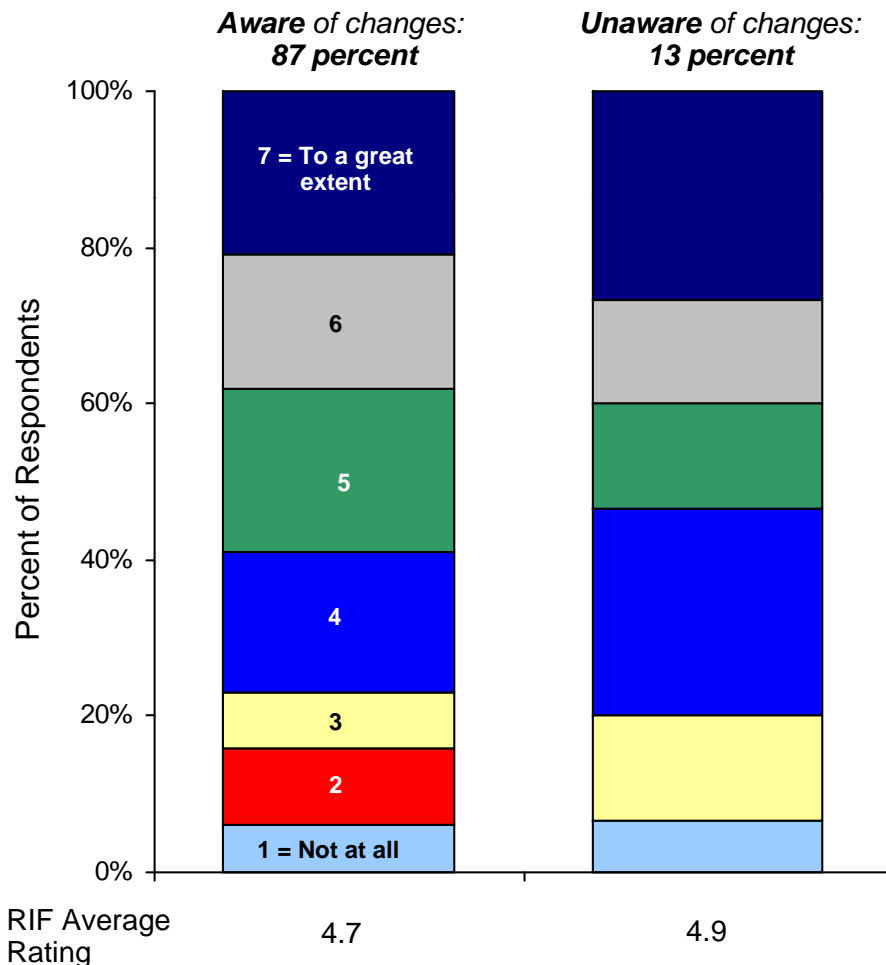


Note: The questions depicted on these charts include a "don't know" response option. In the left-hand chart, 18 percent of RIF 2010 respondents answered "don't know," compared to 25 percent at the median funder, 15 percent of RIF 2008 respondents, 14 percent of RIF 2003 respondents, and 22 percent of respondents at the median community foundation. In the right-hand chart, 23 percent of RIF 2010 respondents answered "don't know," compared to 41 percent at the median funder, 20 percent of RIF 2008 respondents, 22 percent of RIF 2003 respondents, and 34 percent of respondents at the median community foundation.

Changes to Strategic Priorities

RIF grantees were asked whether they were aware of changes in the Foundation’s strategic priorities and grant programs in education and primary health as well as to rate the extent to which the Foundation’s new initiatives in education and primary health care will affect their organization, with 1 = “Not at all” and 7 = “To a great extent.” Lastly, they were asked to comment on any effects, positive or negative, of these changes on their organization and/or view of the Foundation’s grant programs

Extent to which you think the Foundation’s new initiatives will affect your organization



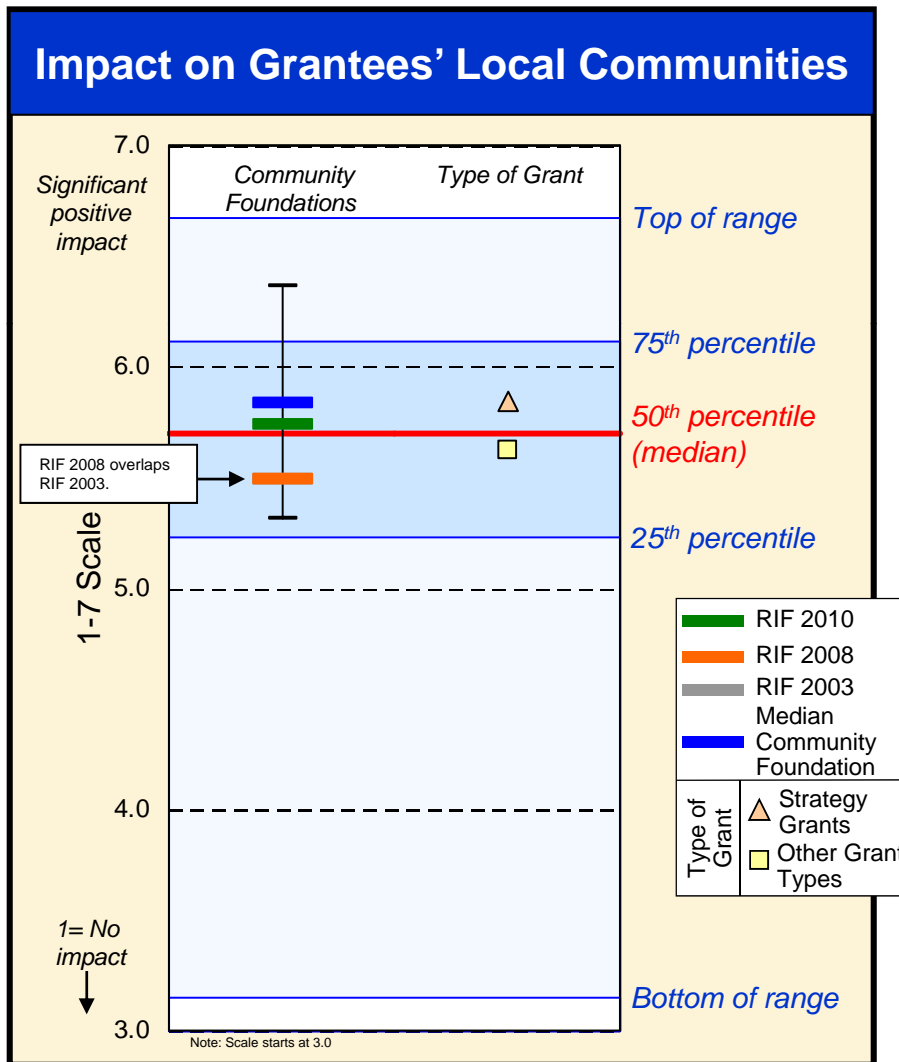
Grantee Comments

- “The Foundation’s commitment to prioritize education signals a recognition that improving RI’s education system is our state’s best chance to move the state forward.”
- “I believe that the Foundation will continue, as it says, to dedicate resources and funding to the core areas and that the areas of focus will for the most part be redoubled investments rather than take away from any other issue areas. A small tinge of concern remain however that limited resource ‘might’ effect a decrease in the level of commitment to our issue area.”
- “I respect and admire the Foundation’s decision. I know they put a lot of effort, thought and research into these changes and how they would affect the community. Healthcare and Education are undoubtedly two of our most pressing issues both locally and nationally and they need intense focus from community leaders, corporations and individuals. The Foundation’s increased focus will be a fuel for change and I am grateful.”
- “Don’t know. Too early to tell.”
- “It is the ‘only’ state-wide Foundation and so it should be careful not to limit its scope.”
- “We are an environmental organization and will have a difficult time matching our work to the Foundation’s priorities.”

Impact on Grantees' Local Communities

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

- similarly to the median funder
- similarly to the median community foundation



Selected Grantee Comments

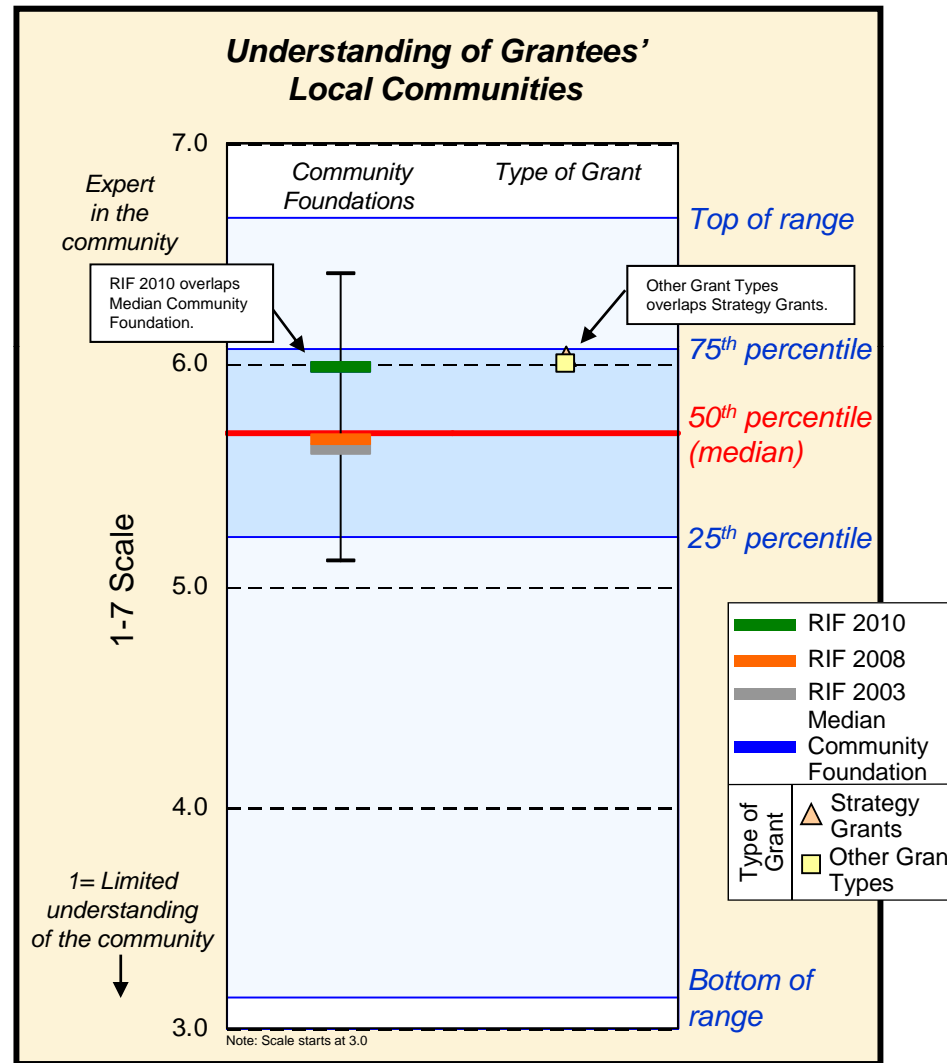
- ♦ “The Foundation is strategically aligning itself to other foundations and stakeholders to influence core community issues in the areas of housing, workforce development, and early childhood education.”
- ♦ “The Foundation is seen as a community and thought leader in many disciplines. The staff are highly respected, and bringing the resources they do to back their opinions and ideas certainly is an important part of this strength.”
- ♦ “[We] would like to see...more involvement in [the] south county non-profit community.”
- ♦ “The RI Foundation is unmatched in its desire to help Rhode Island organizations and make the state a better place. Being one of the main funding entities in the state, its impact is immense.”

Note: This question includes a “don’t know” response option; 5 percent of RIF 2010 respondents answered “don’t know,” compared to 11 percent at the median funder, 5 percent of RIF 2008 respondents, 3 percent of RIF 2003 respondents, and 6 percent of respondents at the median community foundation. **CONFIDENTIAL** | © The Center for Effective Philanthropy | 6/25/2010

Understanding of Grantees' Local Communities

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

- above the median funder
- similarly to the median community foundation



Note: This question includes a "don't know/not applicable" response option; 7 percent of RIF 2010 respondents answered "don't know/not applicable," compared to 13 percent at the median funder, 3 percent of RIF 2008 respondents, 0 percent of RIF 2003 respondents, and 7 percent of respondents at the median community foundation.

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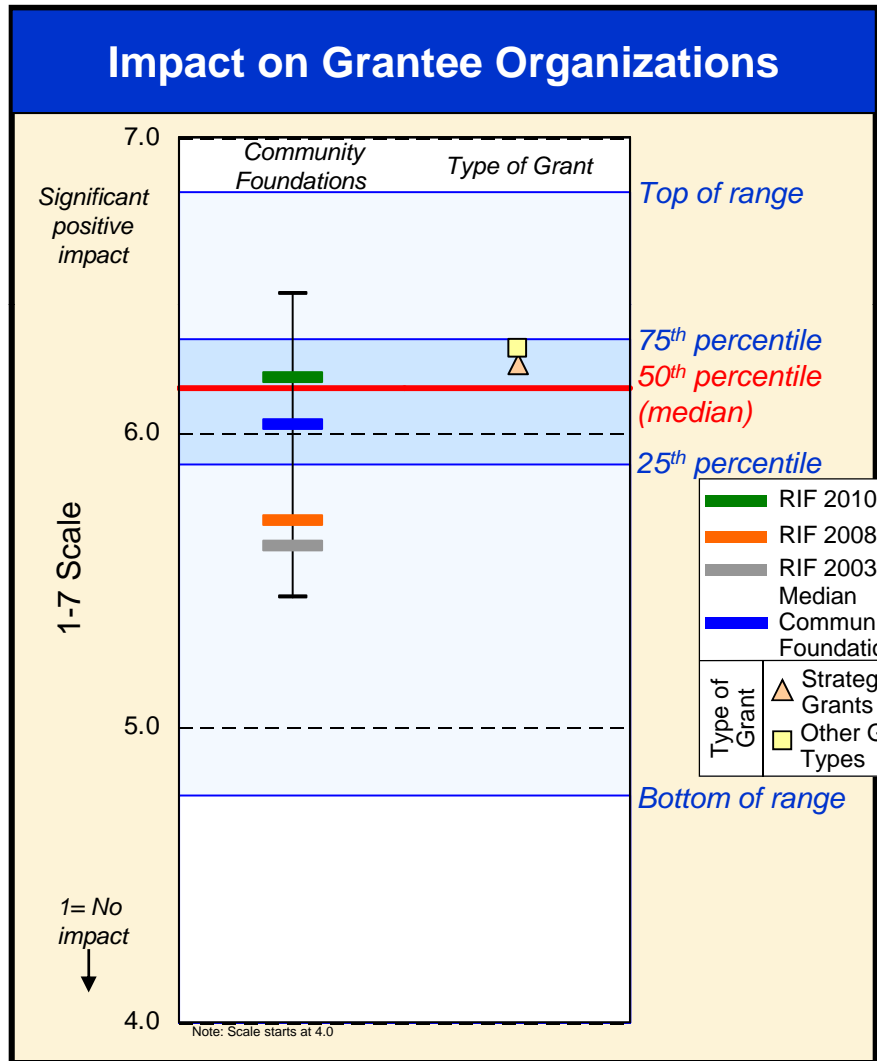
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Impact on Grantee Organizations

On impact on grantee organizations, RIF is rated:

- similarly to the median funder
- above the median community foundation



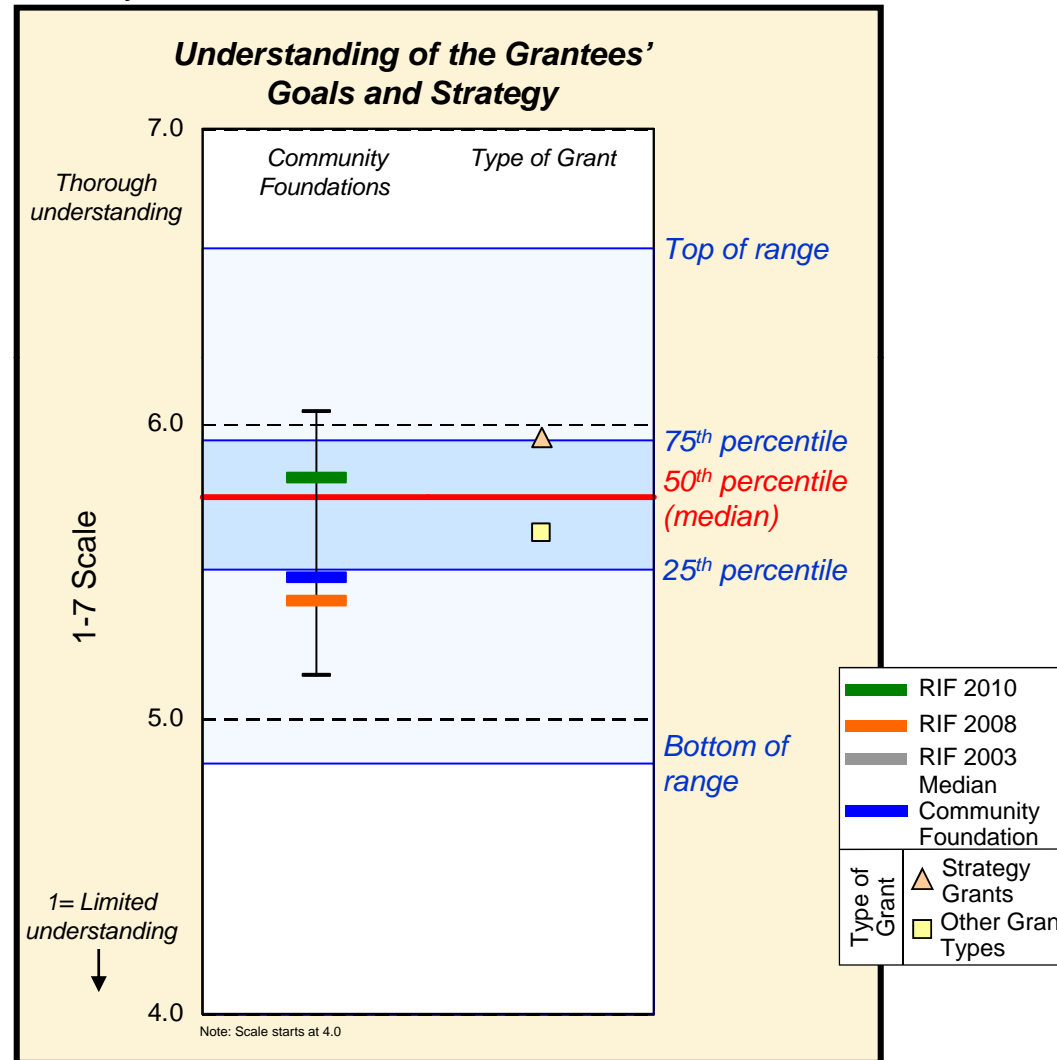
Selected Grantee Comments

- ♦ *“It was a pleasant and welcoming experience – the Foundation staff was well educated on our organization and had a strong science background to better understand the mission of our organization.”*
- ♦ *“I appreciate my interactions with our program officer. She is knowledgeable and thoughtful about the issues connected to our program and about our field. She brings a unique perspective to our conversations... which only strengthens our interactions.”*
- ♦ *“Any interaction I’ve had with the Foundation has been fairly helpful. When I inquired about receiving help for an organizational strategy grant to build our organization, I had trouble connecting with the right person and felt like a lot of assumptions were made about how much I already understood.”*
- ♦ *“Over the years, the Foundation staff have given our organization quite a bit of advice and support...regarding our programs and initiatives.”*

Understanding of Grantees' Goals and Strategy

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

- similarly to the median funder
- above the median community foundation



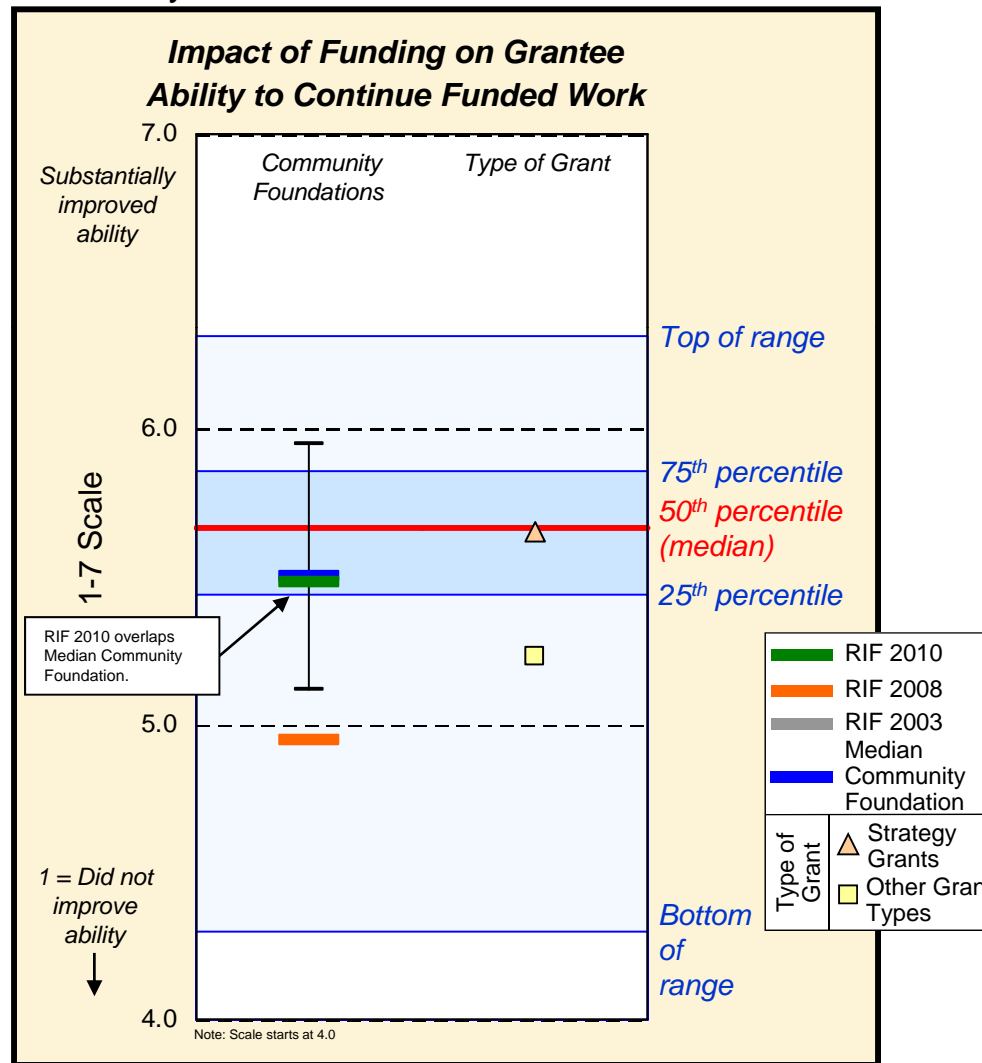
Note: RIF 2003 data not available due to changes to the survey instrument.

Note: This question includes a "don't know" response option; 4 percent of RIF 2010 respondents answered "don't know," compared to 7 percent at the median funder, 0 percent of RIF 2008 respondents, and 7 percent of respondents at the median community foundation.

Impact on Sustainability of Funded Work

On the effect of the Foundation's funding on grantees' ability to sustain the work funded by the grant in the future, RIF is rated:

- below the median funder
- similarly to the median community foundation



Note: RIF 2003 data not available due to changes to the survey instrument.

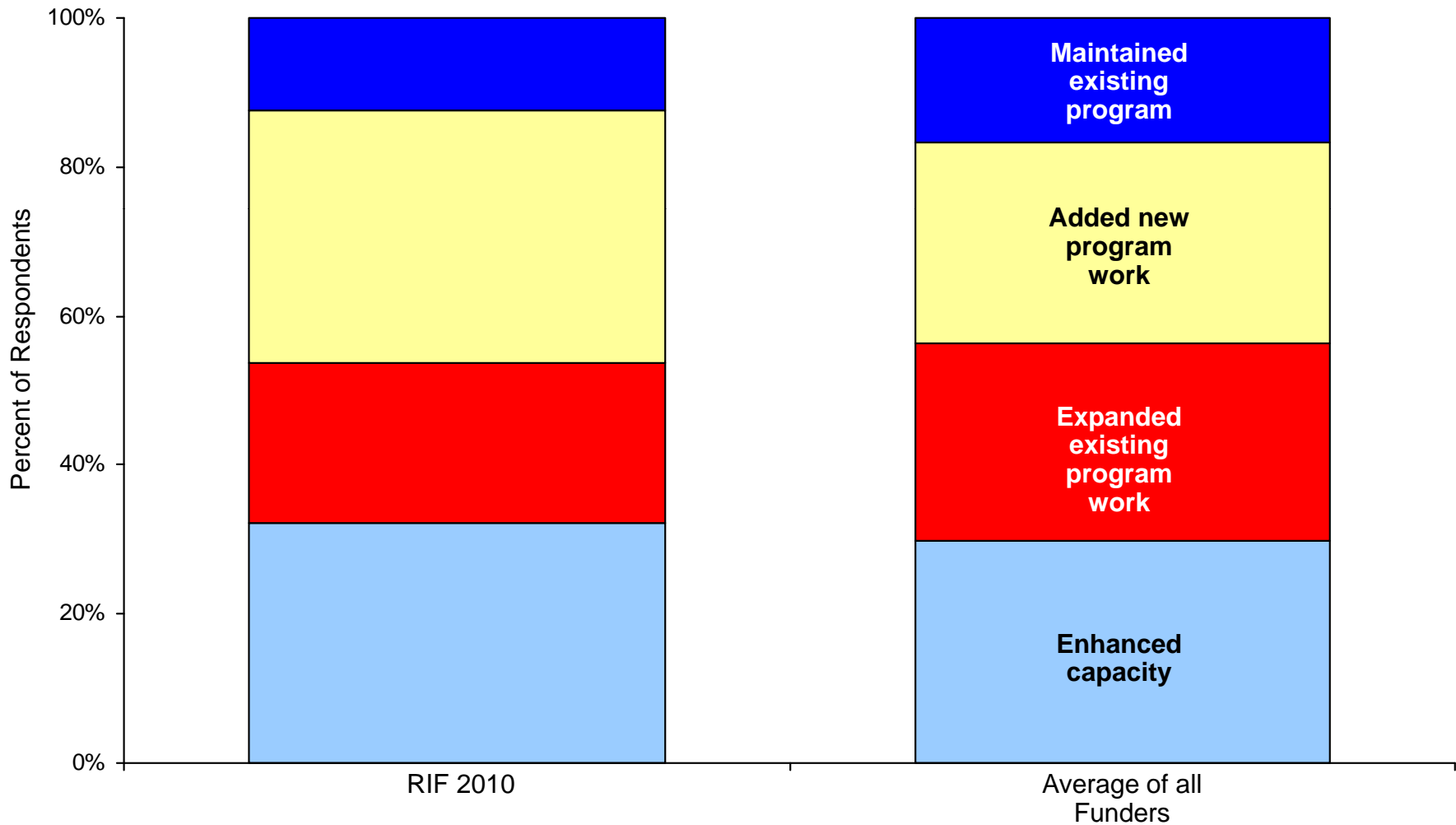
Note: This question includes a "don't know/not applicable" response option; 10 percent of RIF 2010 respondents answered "don't know/not applicable", compared to 11 percent at the median funder, and 8 percent of respondents at the median community foundation.

Grant Effect (1)

The proportion of RIF grantees that used the Foundation's grant primarily to add new program work is:

- larger than that of the average funder

Primary Effect of Grant on Grantee's Organization¹

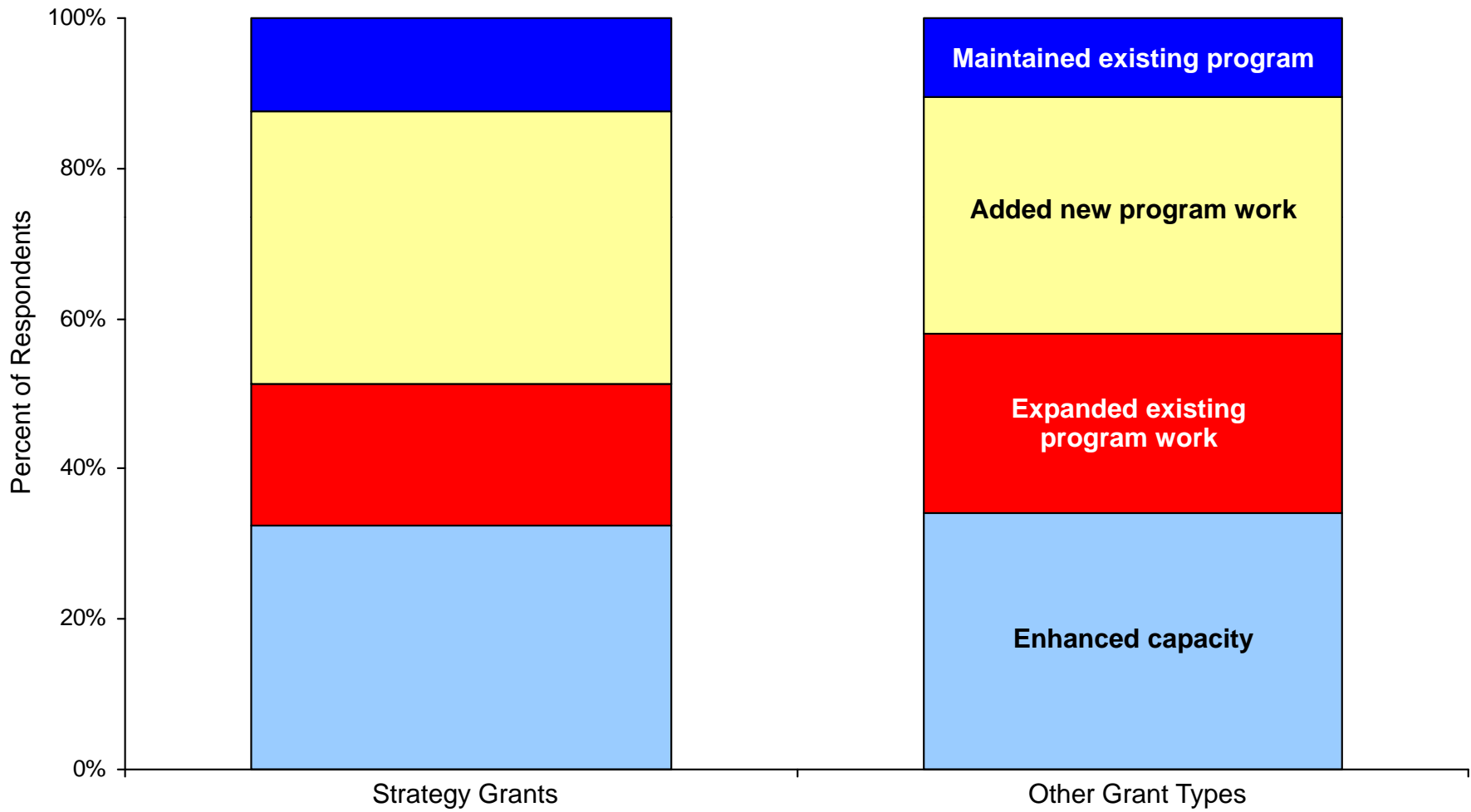


1: This chart includes data about 75 funders.

Note: RIF 2008 data, RIF 2003 data, community foundation data not available due to changes to the survey instrument.

Grant Effect (2)

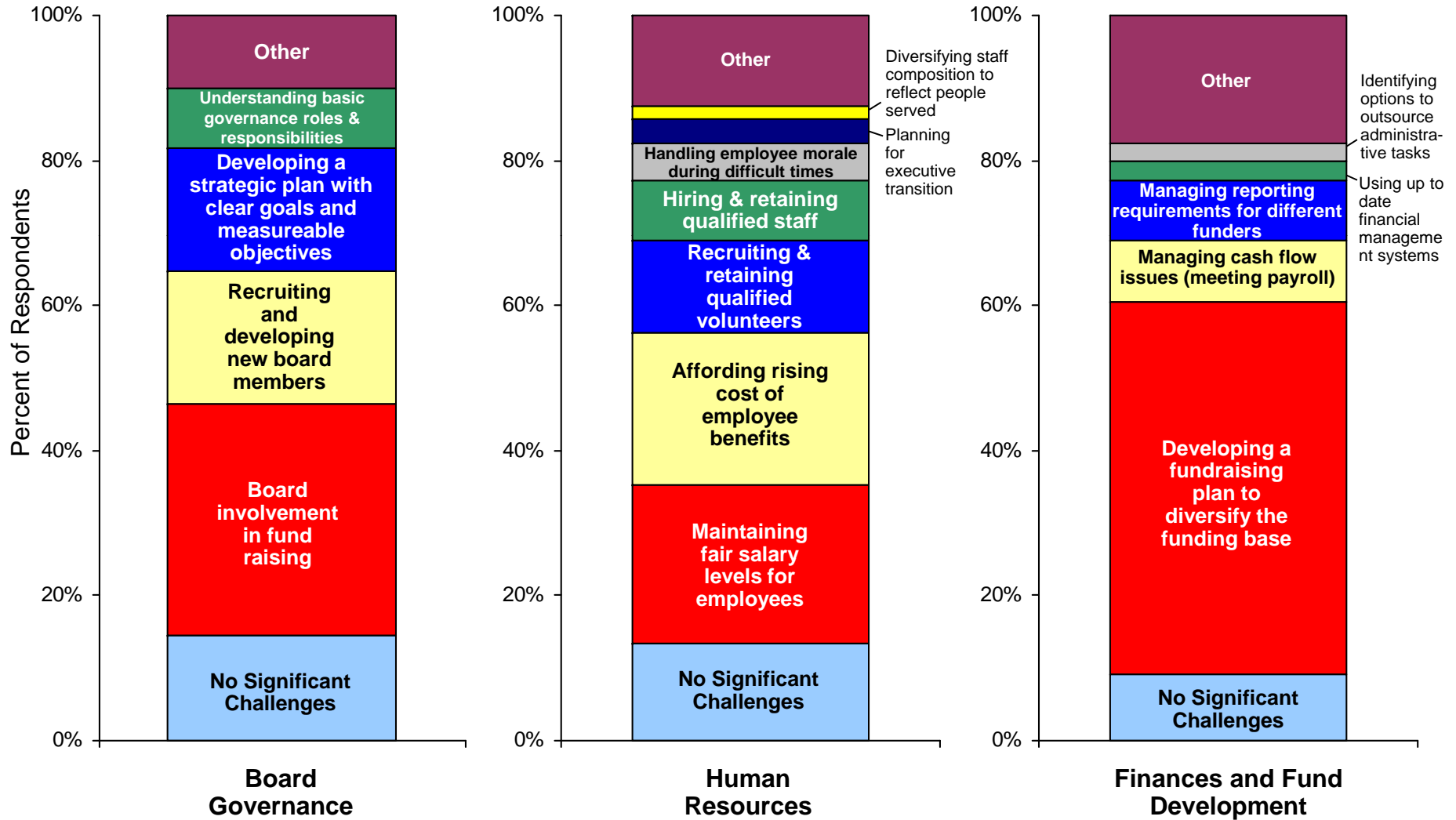
Primary Effect of Grant on Grantee's Organization



FY 2010 Challenges (1)

RIF grantees were asked the biggest challenges their organization will face in Fiscal Year 2010 in various capacity areas.

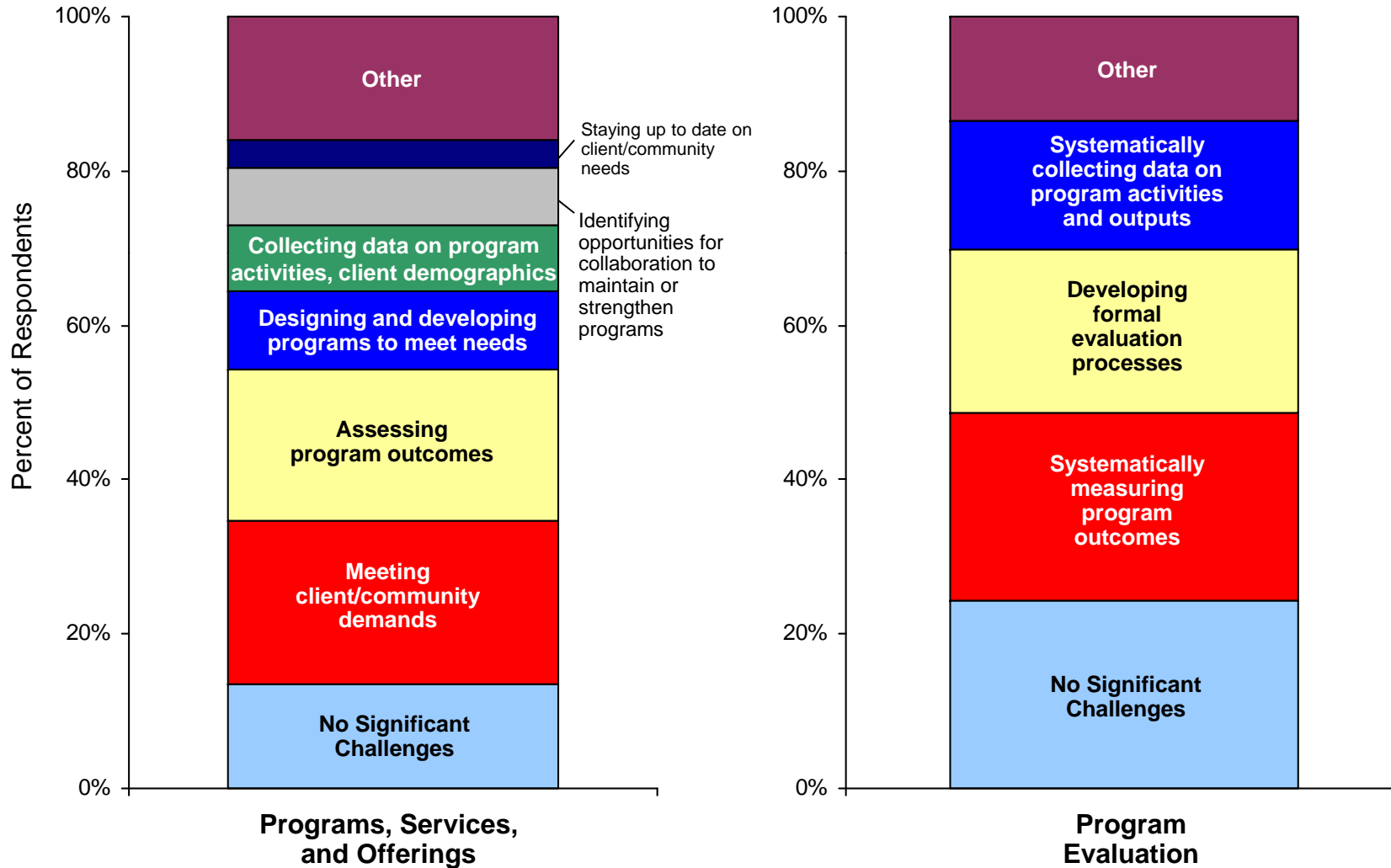
“What are the biggest challenges your organization will face in Fiscal Year 2010 in each of the following capacity areas?”



FY 2010 Challenges (2)

RIF grantees were asked the biggest challenges their organization will face in Fiscal Year 2010 in various capacity areas.

“What are the biggest challenges your organization will face in Fiscal Year 2010 in each of the following capacity areas?”

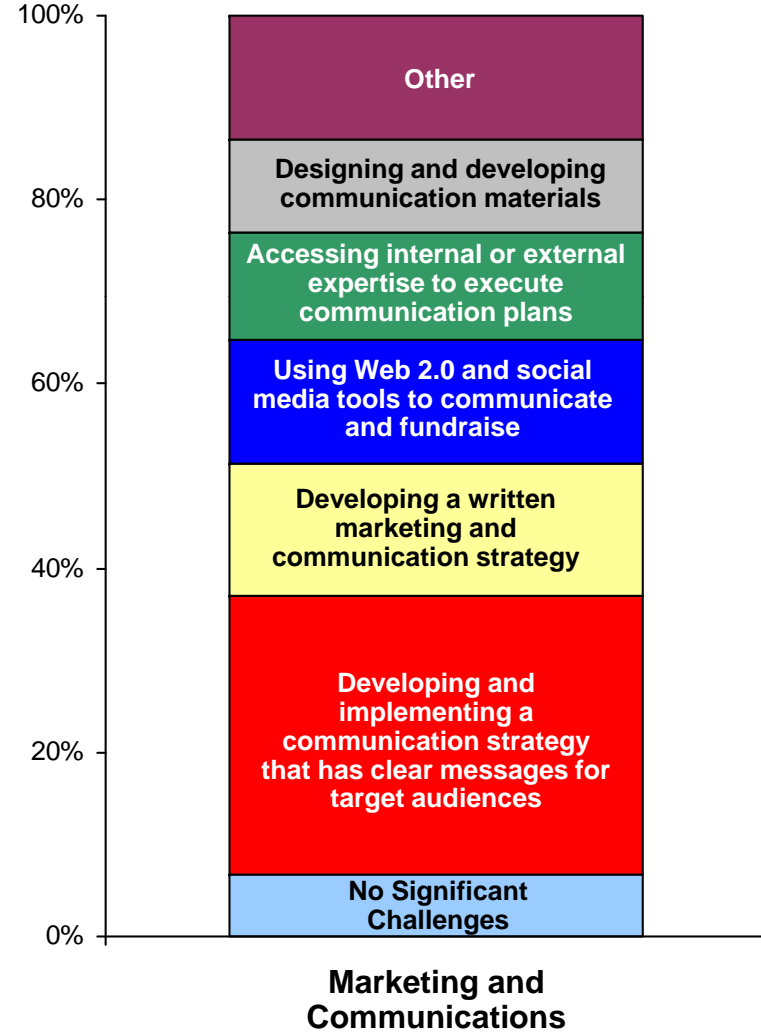
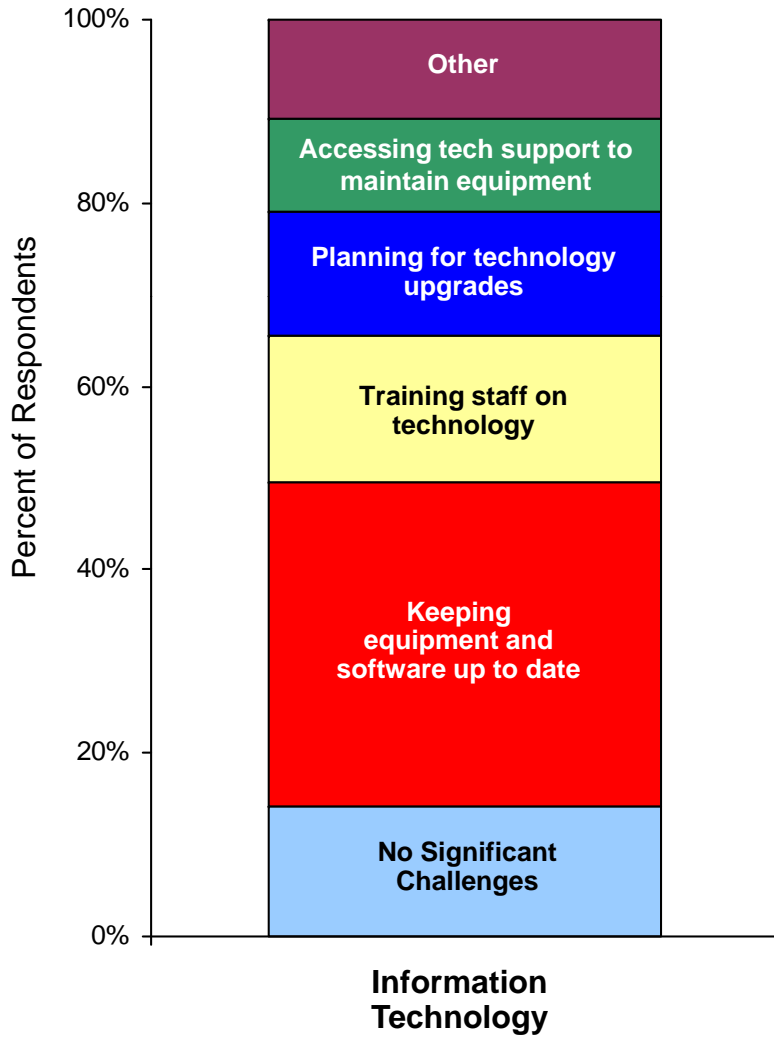


Note: No comparative data is available because the question was only asked of RIF grantees.

FY 2010 Challenges (3)

RIF grantees were asked the biggest challenges their organization will face in Fiscal Year 2010 in various capacity areas.

“What are the biggest challenges your organization will face in Fiscal Year 2010 in each of the following capacity areas?”



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

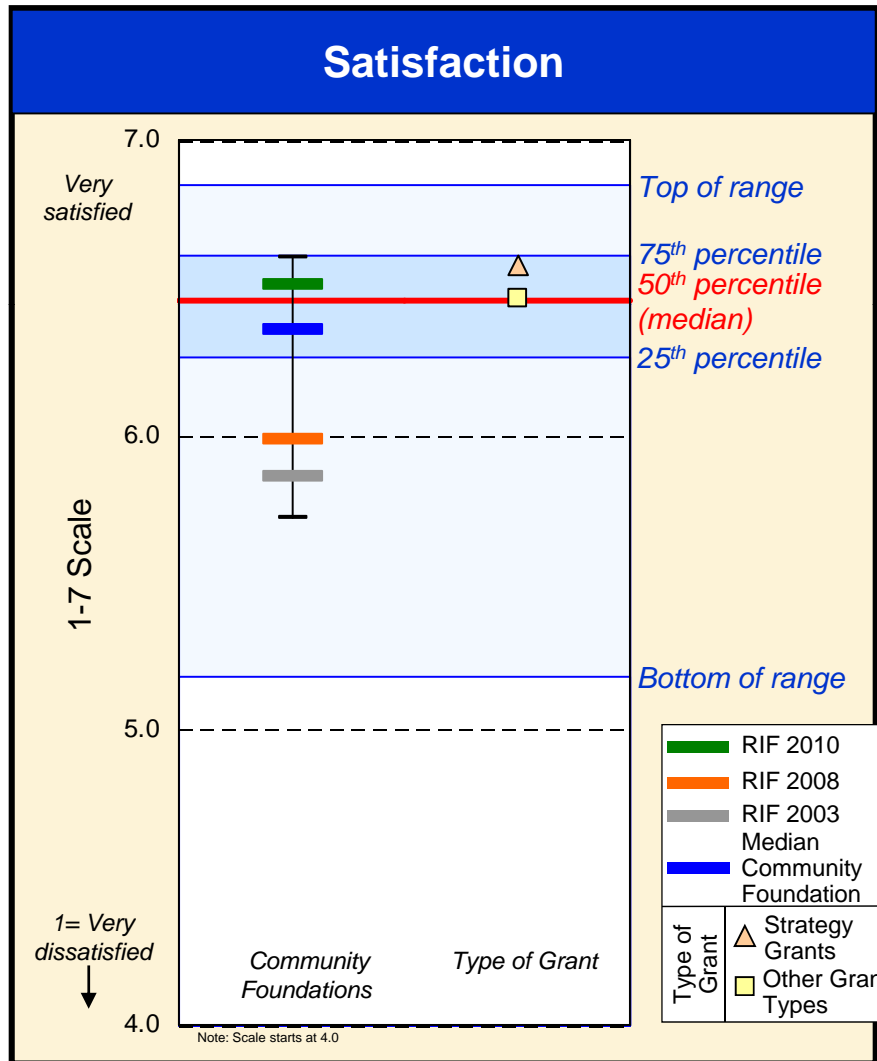
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Satisfaction

On overall satisfaction, RIF is rated:

- similarly to the median funder
- above the median community foundation



Selected Grantee Comments

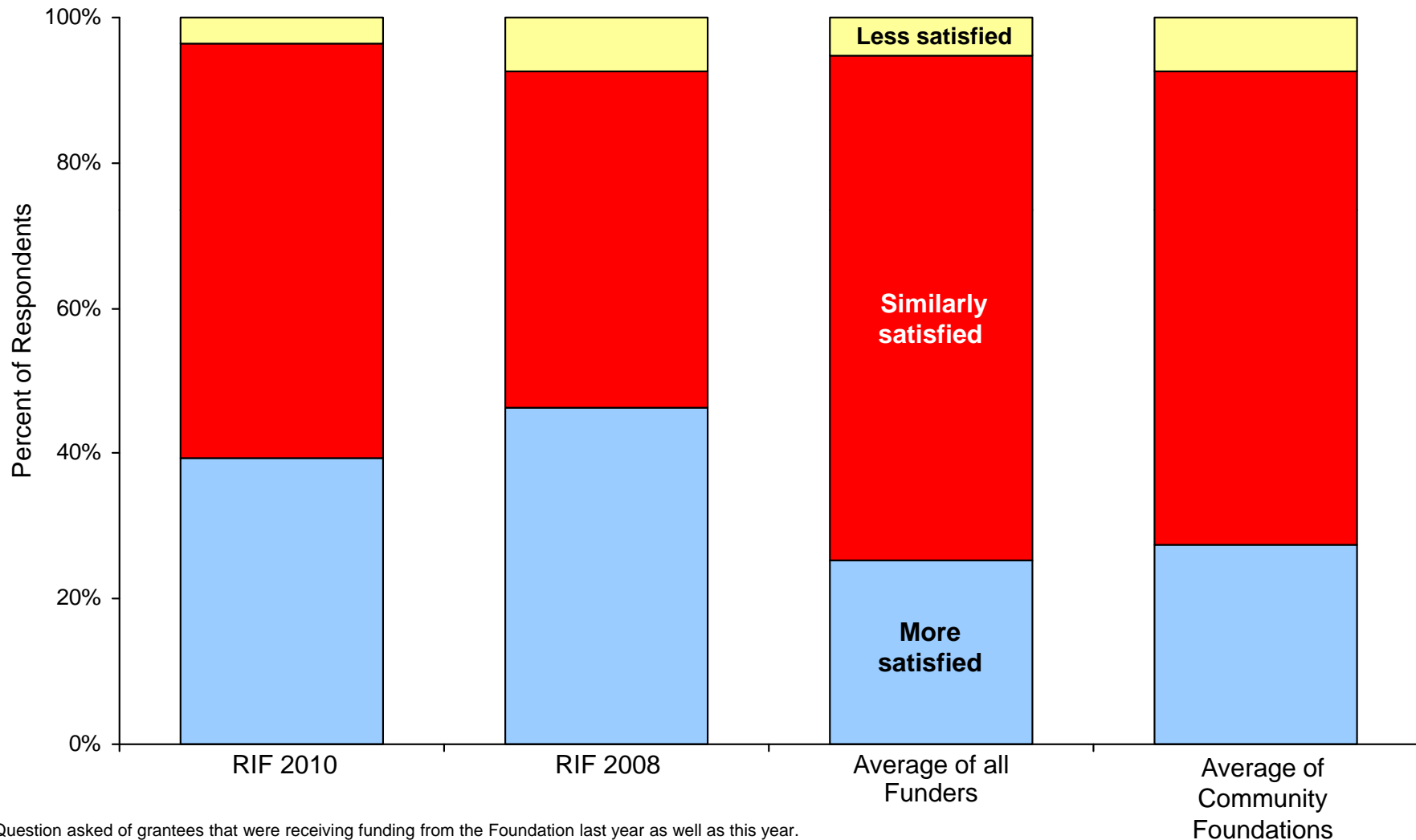
- ◆ *"It is great to work with a results-oriented, action-oriented Foundation that has its priorities in the right places."*
- ◆ *"Top notch in every way. We...always come away with a feeling of mutual support. Very professional, helpful, caring staff."*
- ◆ *"The Foundation is very disengaged...[which] makes it difficult to develop any momentum with the Foundation as a consistent funder/supporter."*
- ◆ *"The Foundation is very well run and the staff are very professional. It operates much more efficiently and [is more] results oriented than just about any other non-profit I have worked with. Most non-profits want to spend months on where to put a comma in their mission statement. The RI Foundation is interested in results without all the BS. Very refreshing!"*
- ◆ *"The original proposal and funding activities were with previous Foundation staff, in 2007. After a lag in communication during 2007-08, [our current PO] became the program officer for the grant. Thereafter, regular, thorough and helpful communications and interactions have occurred."*

Satisfaction Relative to Last Year (1)

The proportion of RIF grantees that are more satisfied this year with the Foundation than they were last year is:

- larger than that of the average funder
- larger than that of the average community foundation

Change in Satisfaction with the Funder from Last Year ¹

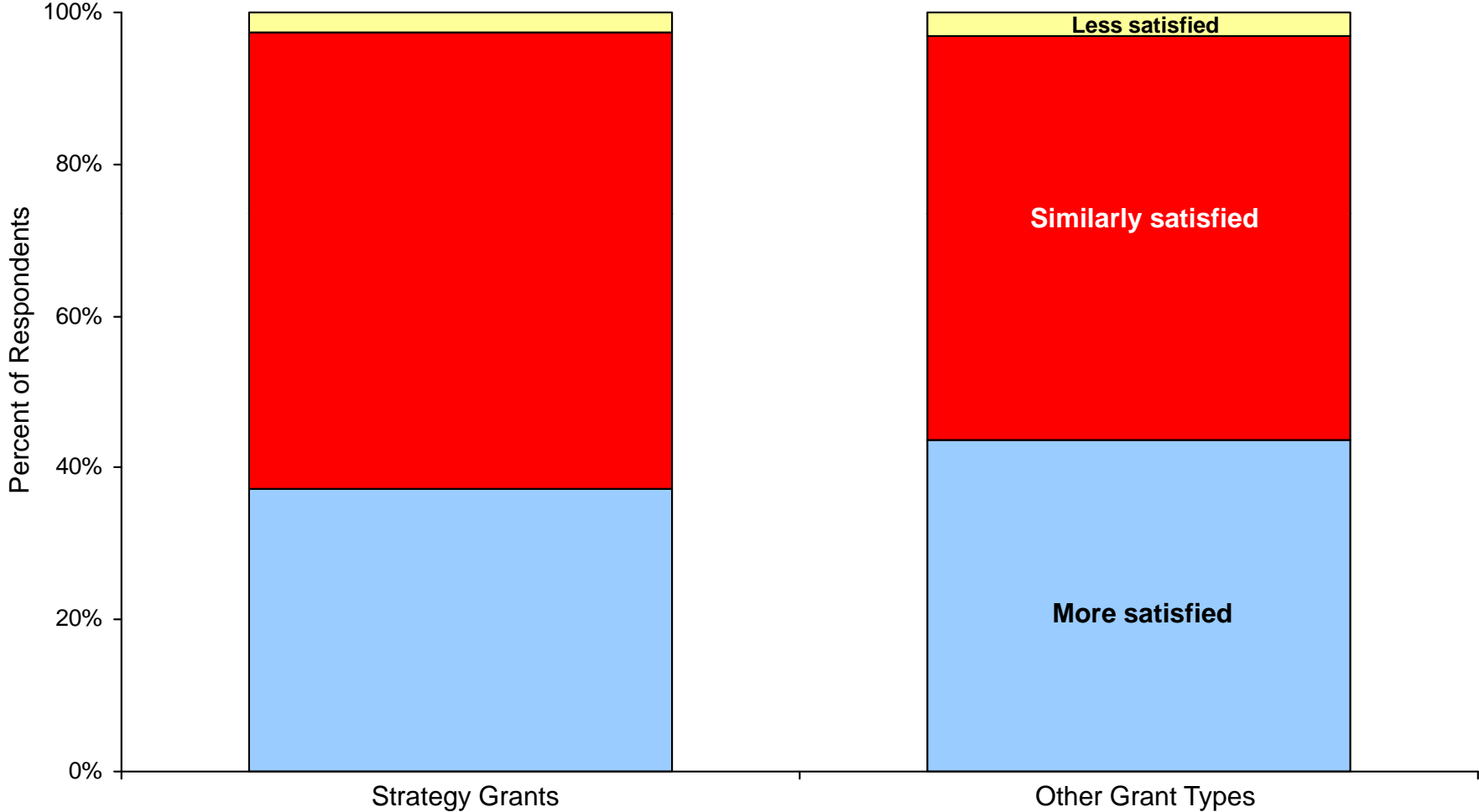


¹: Question asked of grantees that were receiving funding from the Foundation last year as well as this year.

Note: RIF 2003 data not available due to changes to the survey instrument.

Satisfaction Relative to Last Year (2)

Change in Satisfaction with the Funder from Last Year¹

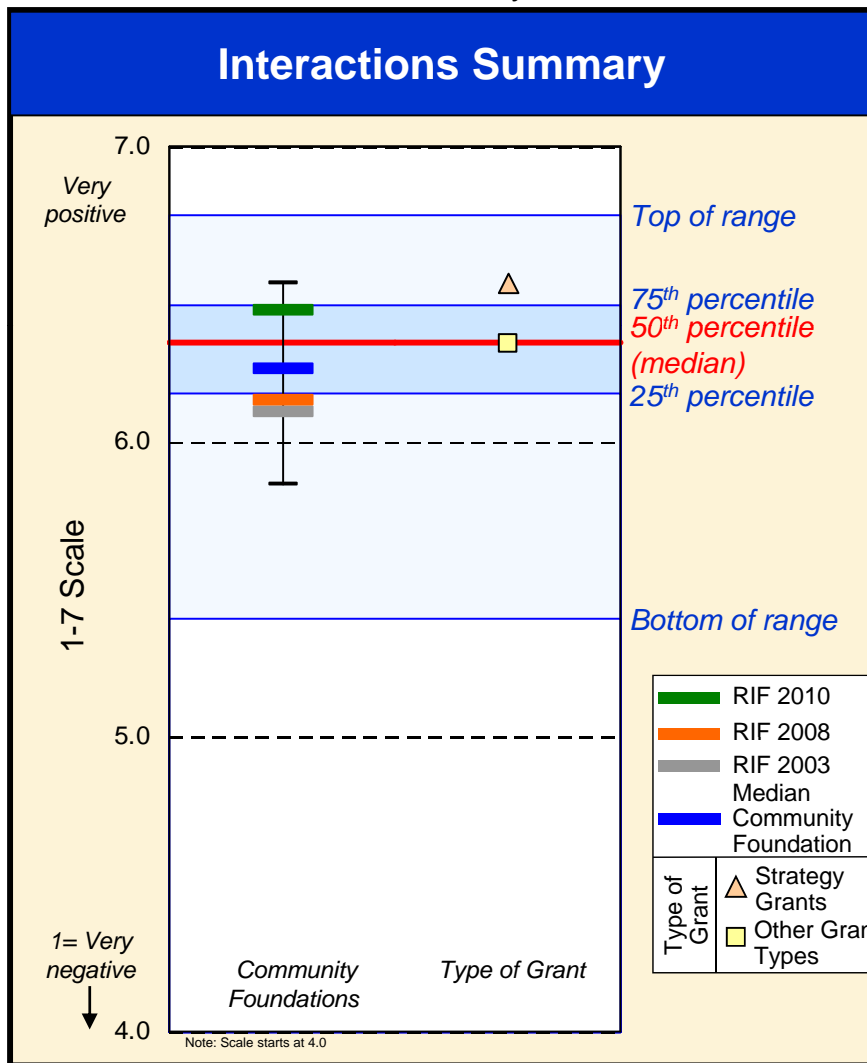


1: Question asked of grantees that were receiving funding from the Foundation last year as well as this year.

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, RIF is rated:

- above the median funder
- above the median community foundation



Selected Grantee Comments

- ◆ *“The Foundation staff are completely professional, knowledgeable, supportable, friendly, helpful, consistent, honest. Even when you don’t hear what you want to hear, they are supportive, helpful, and encouraging. They are well prepared and truly understand the sector, its strengths and its challenges. They are a pleasure to work with.”*
- ◆ *“Over the past four years we have been working with five different persons from the Foundation and all of them have one common philosophy which is to support all the individuals. They have guided us to get a grant and even more to be successful in our project. They have done the arrangements to meet with at the schedule we need to and have been answering e-mails, phone calls, etc. They have given us relevant information that should be included in the proposals as well as telling us the importance of completing a report at the end of each project.”*
- ◆ *“During the entire length of our grant which has been in effect since...2008 there have been no meetings with RIF staff, and only calls instigated by our office. I would prefer a quarterly review meeting initiated by the RIF at [the] very least.”*
- ◆ *“Our program officer contact was terrific to interact with. She took the time to really understand our project and the benefits we believe it will produce for RI. She had excellent, challenging questions.”*

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.

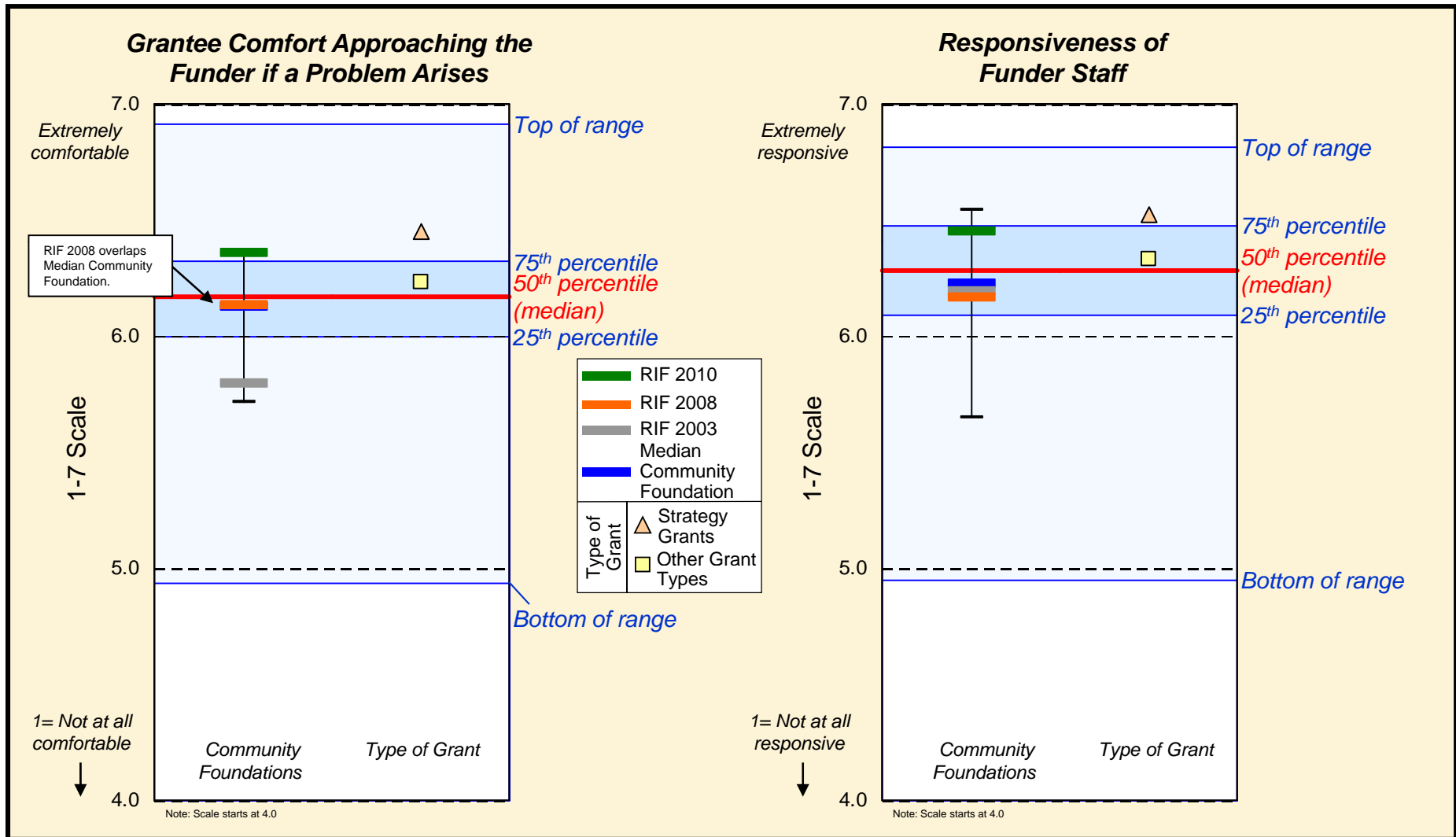
Interactions Measures (1)

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

- above the median funder
- higher than all other community foundations

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

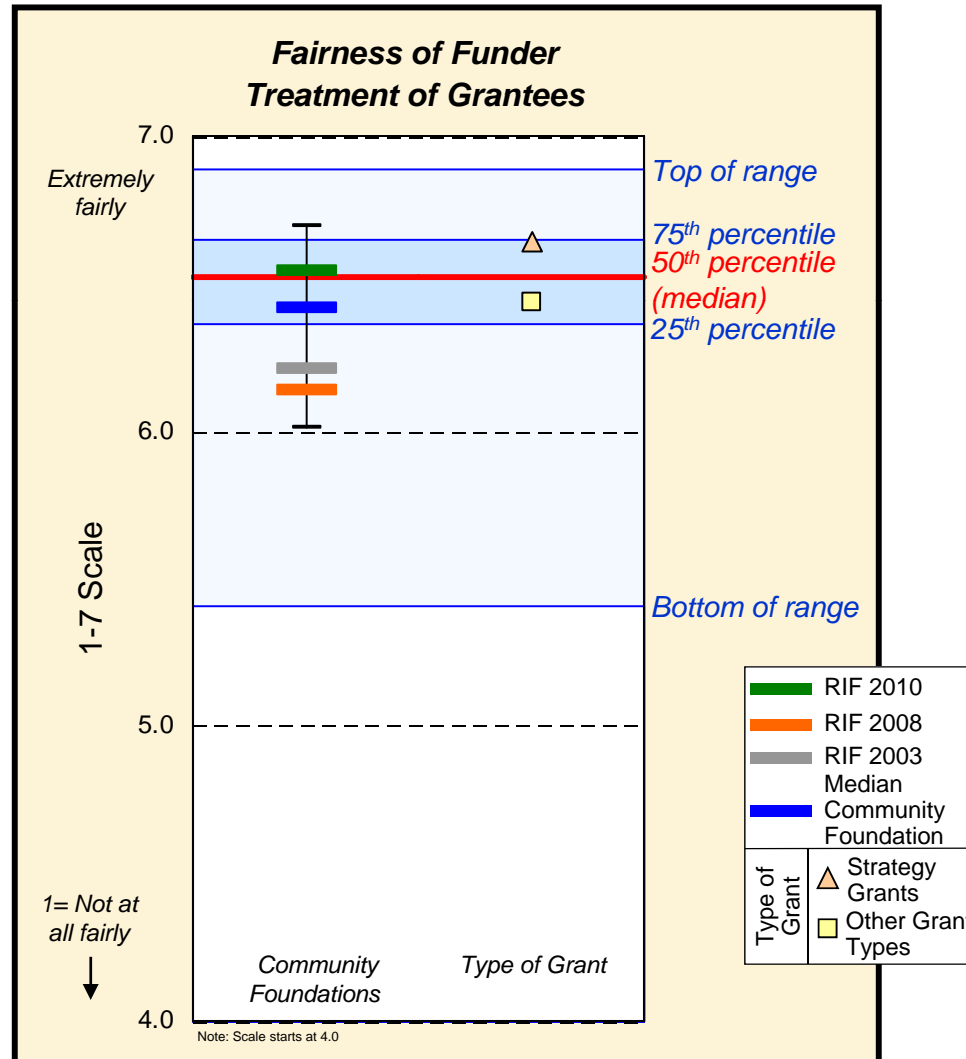
- above the median funder
- above the median community foundation



Interactions Measures (2)

On fairness of treatment of grantees, RIF is rated:

- similarly to the median funder
- above the median community foundation

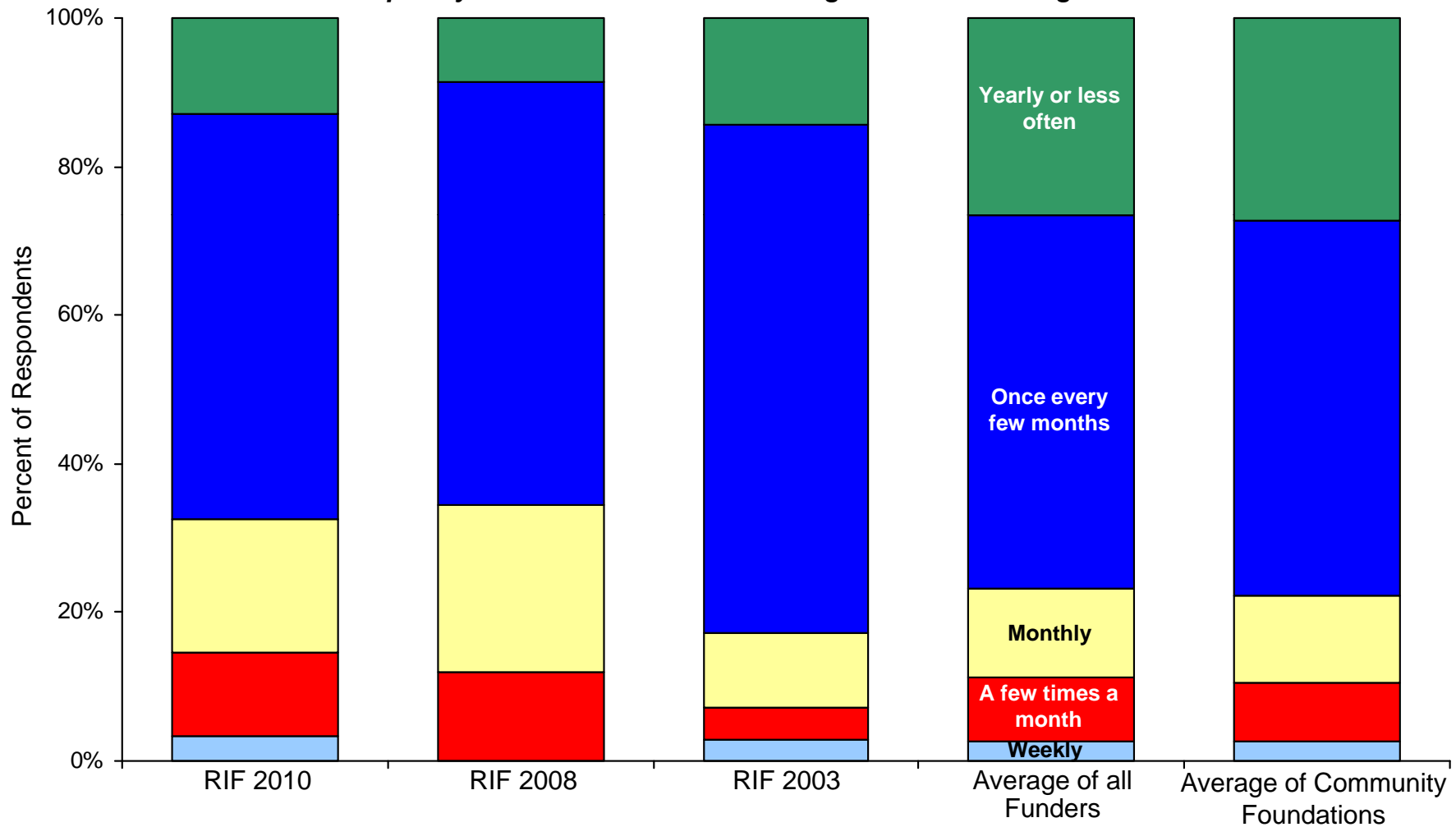


Frequency of Interactions (1)

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

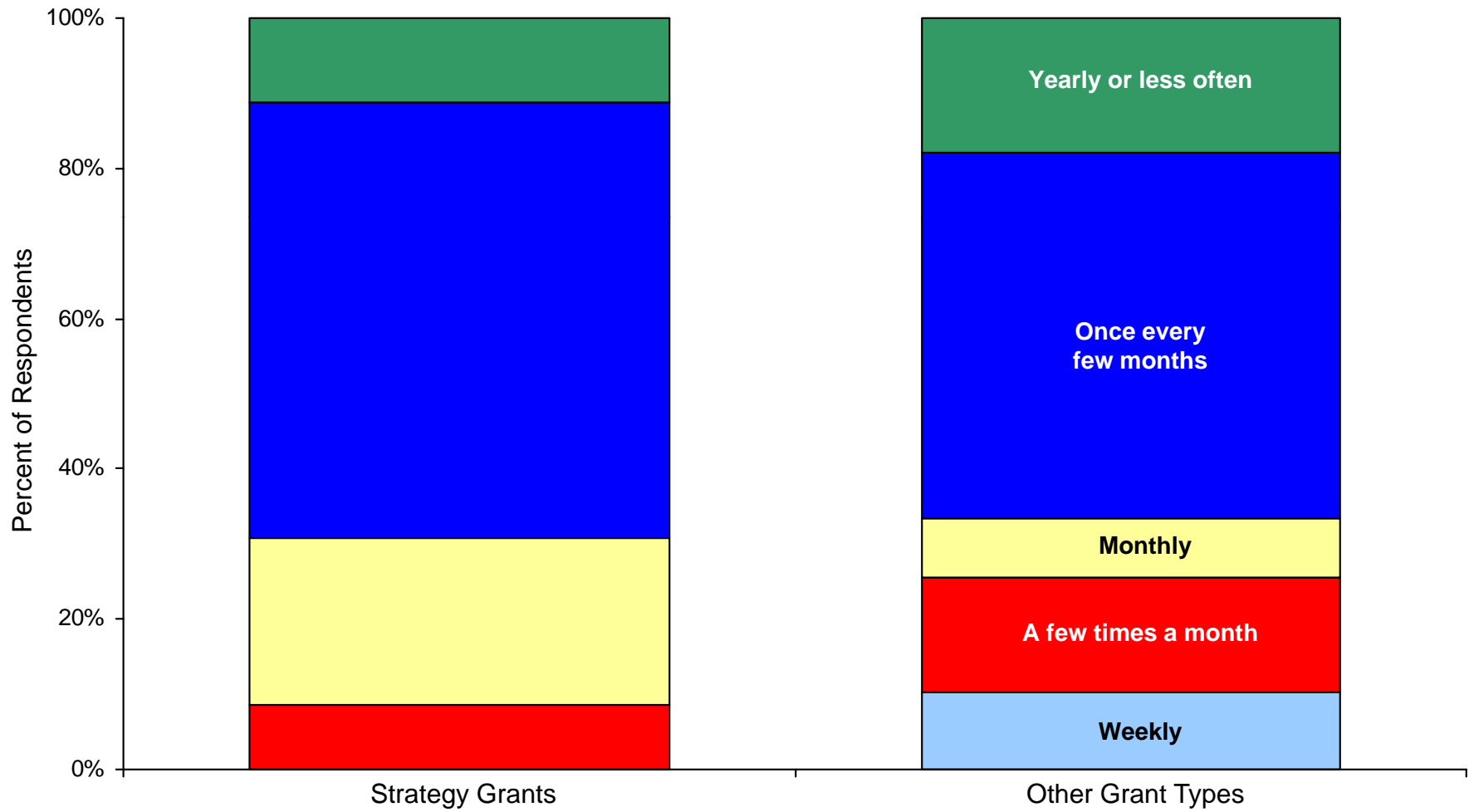
- larger than that of the average funder
- larger than that of the average community foundation

Frequency of Grantee Contact with Program Officer During Grant



Frequency of Interactions (2)

Frequency of Grantee Contact with Program Officer During Grant

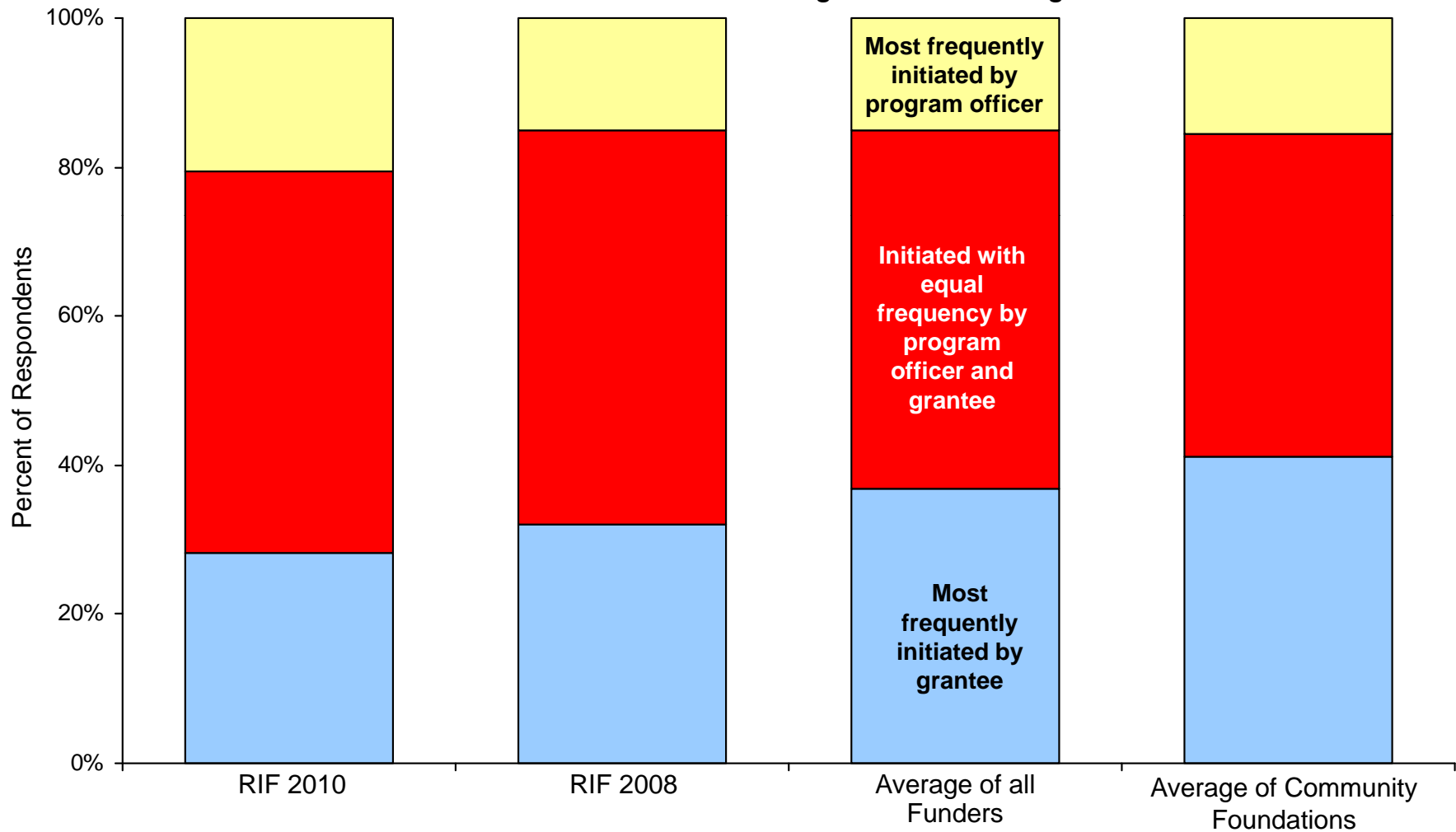


Initiation of Interactions (1)

The proportion of RIF grantees that report that they most frequently initiate interactions with the Foundation

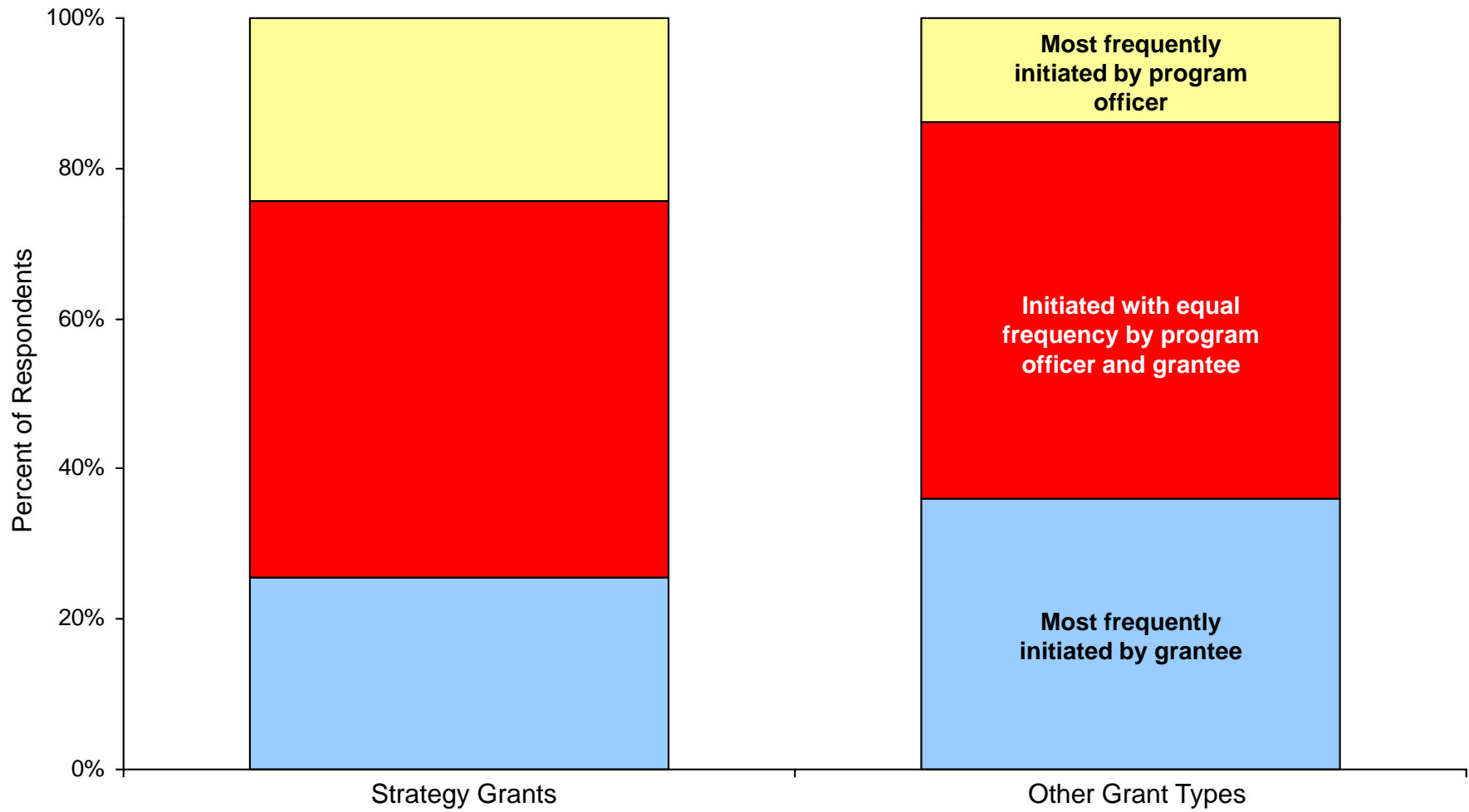
- smaller than that of the average funder
- smaller than that of the average community foundation

Initiation of Grantee Contact with Program Officer During Grant



Initiation of Interactions (2)

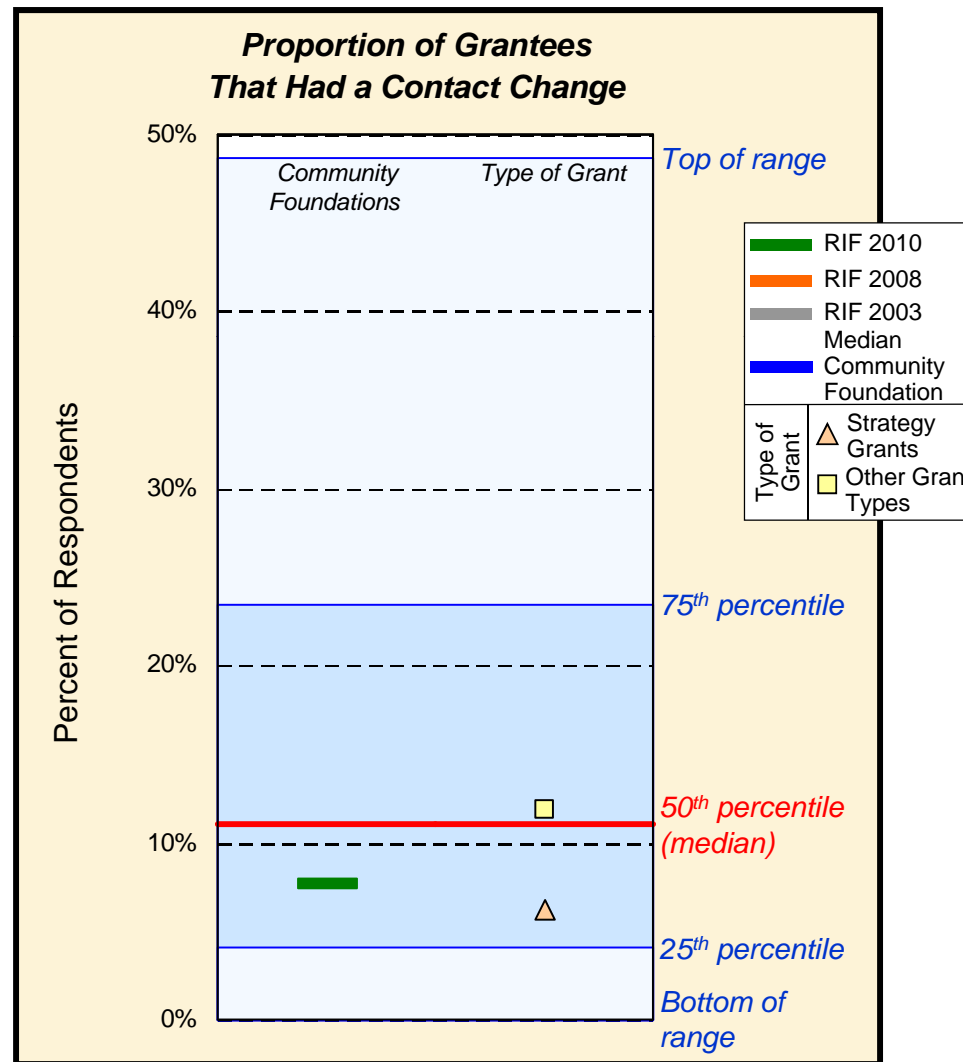
Initiation of Grantee Contact with Program Officer During Grant



Proportion of Grantees That Had a Change in Primary Contact

The proportion of RIF grantees who had a change in their primary contact in the last six months is:

- smaller than that of the median funder



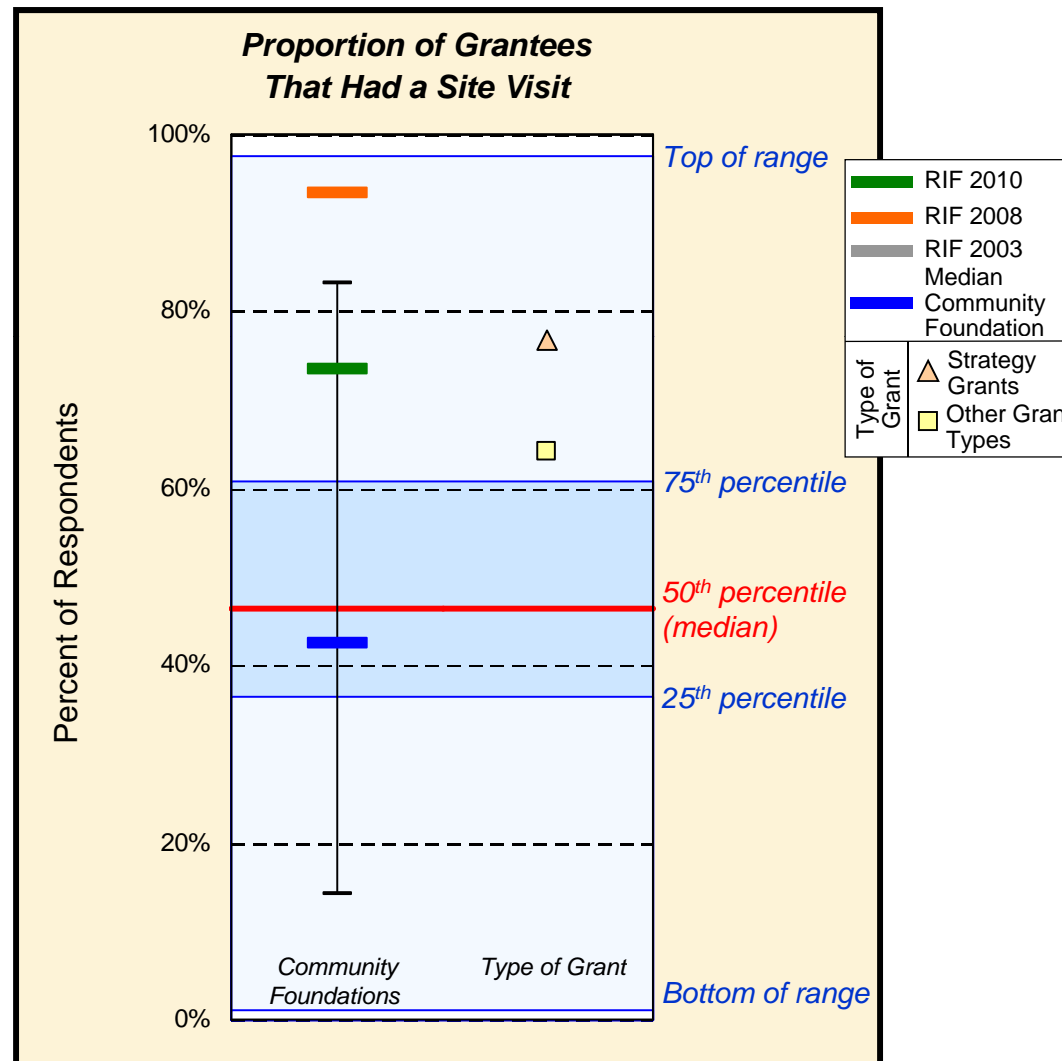
Note: RIF 2008 data, RIF 2003 data, and community foundation data not available due to changes to the survey instrument.

Note: Chart contains data from 36 funders.

Proportion of Grantees That Had a Site Visit

The proportion of RIF grantees receiving a site visit is:

- larger than that of the median funder
- larger than that of the median community foundation



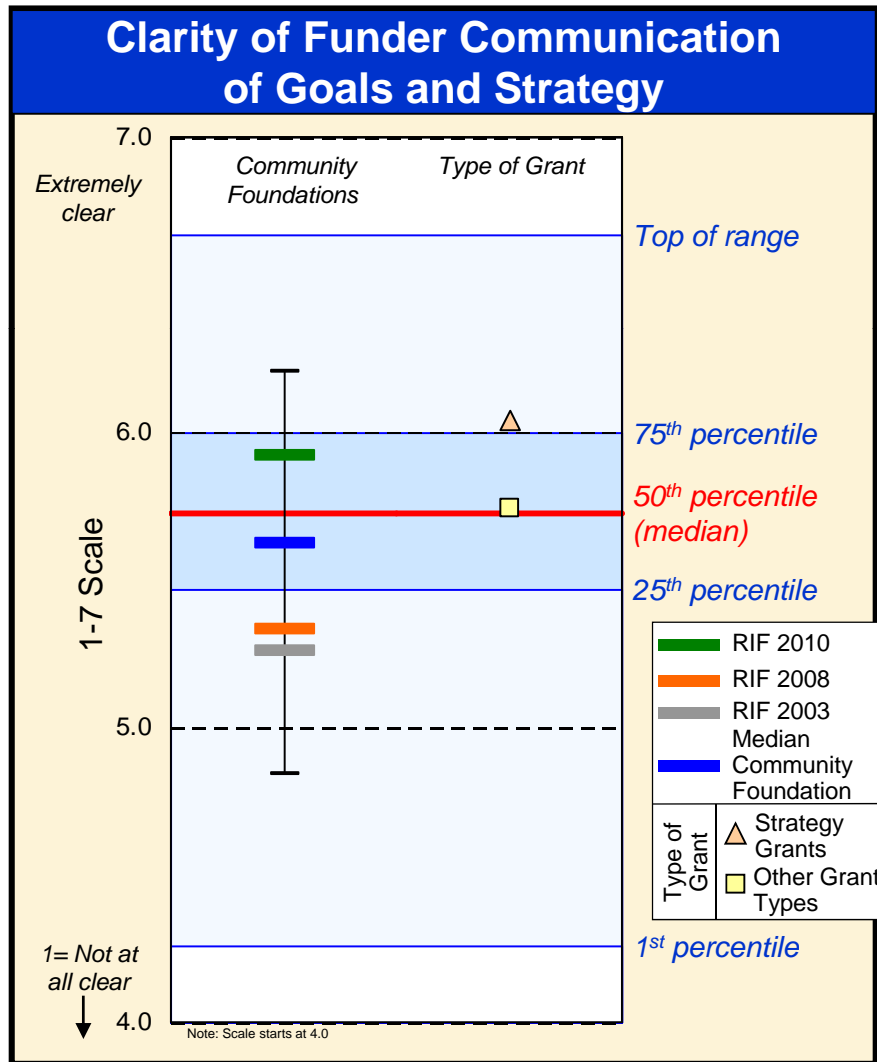
Note: RIF 2003 data not available due to changes to the survey instrument.

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.

Communication of Goals and Strategy

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

- above the median funder
- above the median community foundation



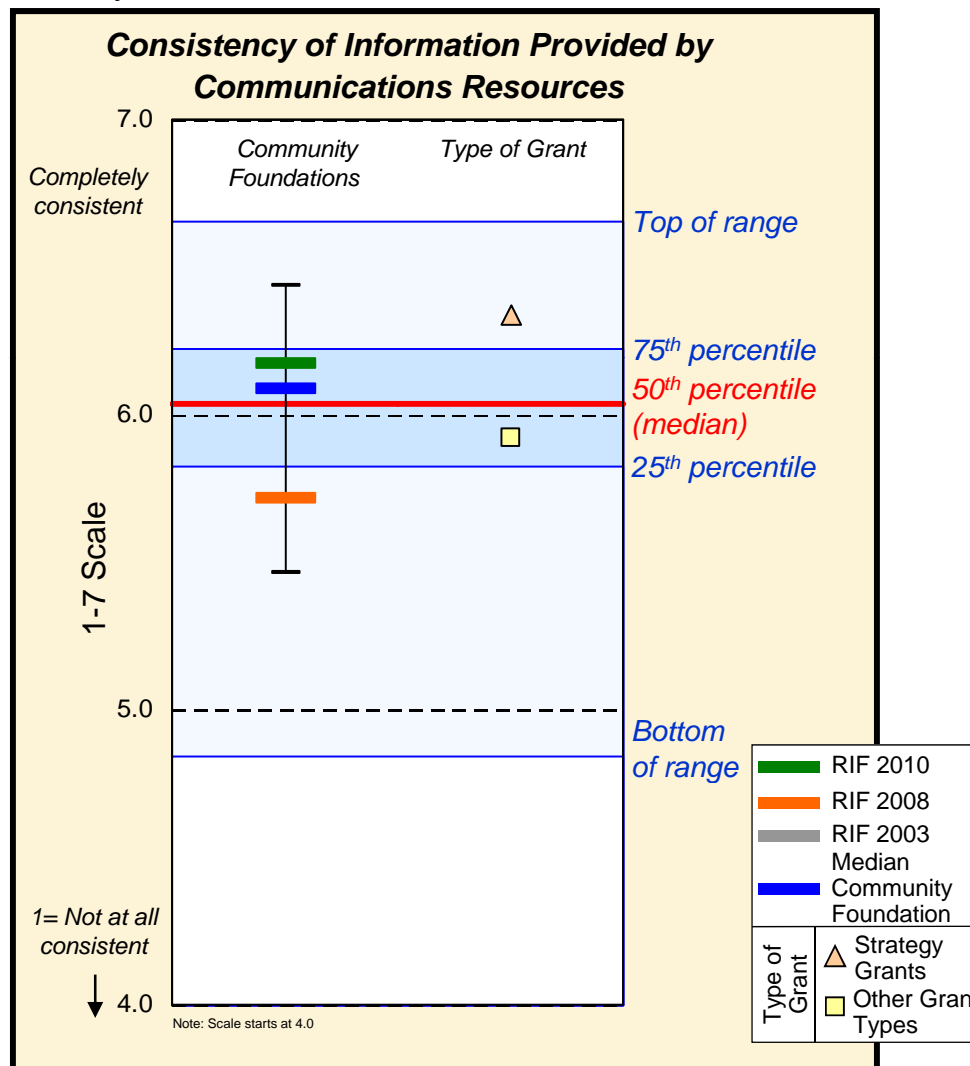
Selected Grantee Comments

- ♦ *"I have been totally impressed by the quality of staff, written materials and processes working with the Foundation. Even when transitioning from one principal contact to another, the transition was smooth and comfortable, expectations were consistent and lines of communication were clear."*
- ♦ *"Overall, the website is user friendly and communication with staff has always been informative and professional."*
- ♦ *"All consistent, but would like to know more about the new direction and priorities launched this year."*
- ♦ *"Staff are professional and well trained – I have never received inconsistent communication from the Foundation."*
- ♦ *"Staff was approachable, clear, helpful, available and helped to clarify questions about information on the website as well as to explain in more detail the criteria for funding."*

Consistency of Communications

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

- above the median funder
- similarly to the median community foundation



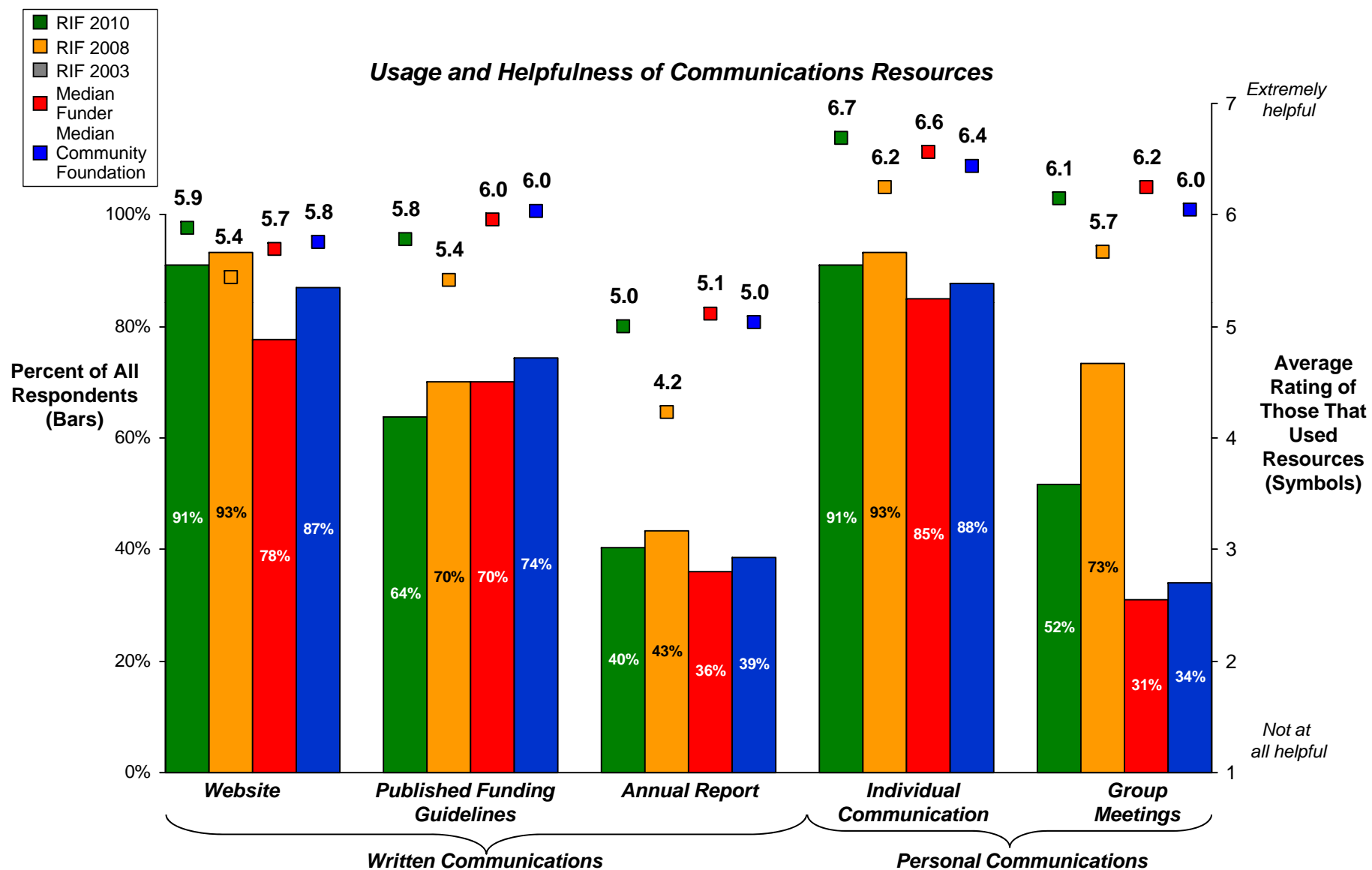
Note: RIF 2003 data not available due to changes to the survey instrument.

Note: This question includes a "used one or no resources" response option; 2 percent of RIF 2010 respondents indicated they had used one or no resources, compared to 5 percent at the median funder, 0 percent of RIF 2008 respondents, and 5 percent of respondents at the median community foundation.

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Communications Resources (1)

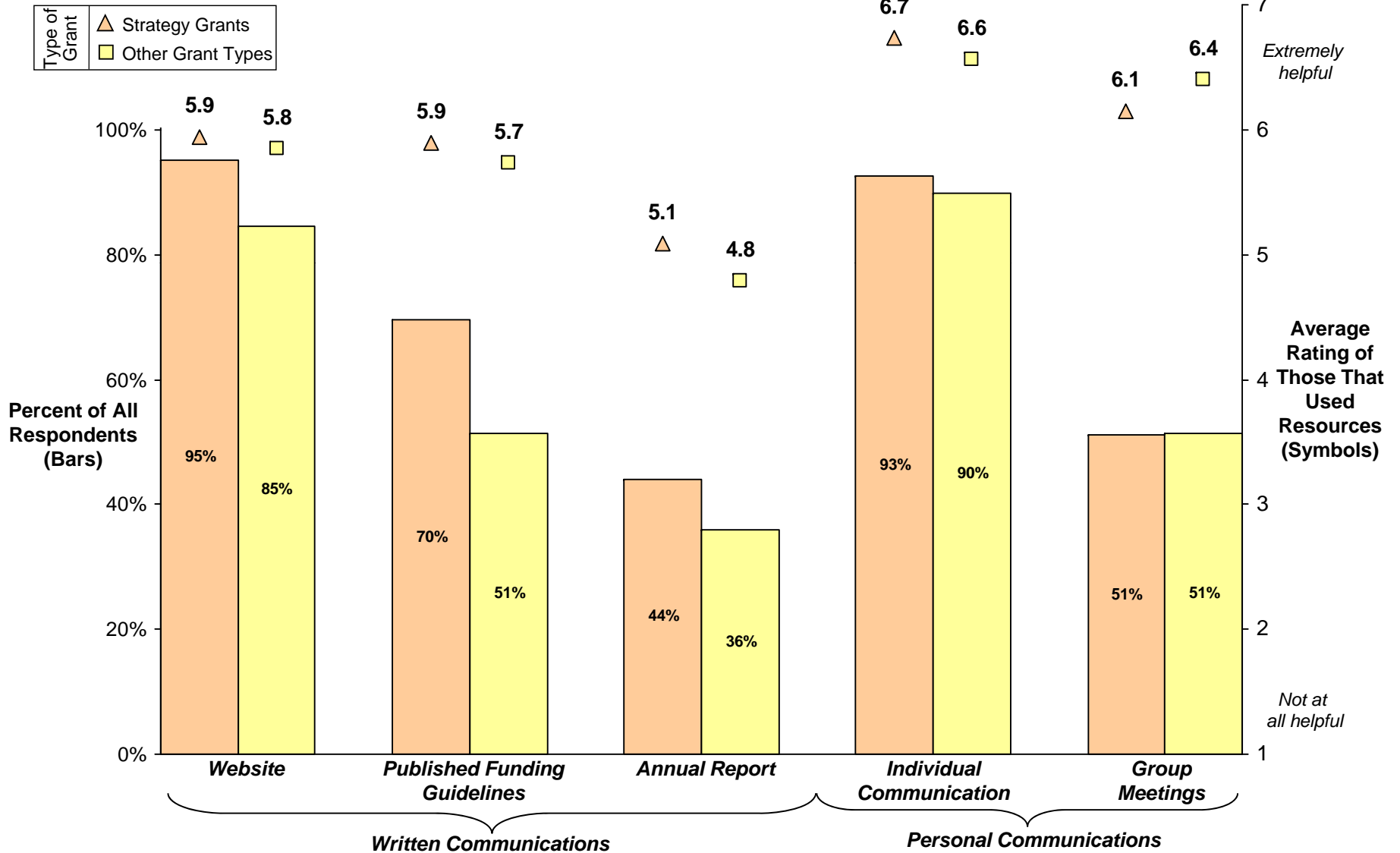
The Foundation's communications resources are rated similarly in their helpfulness to grantees, compared to the median philanthropic funder.



Note: RIF 2003 ratings not shown because of changes to the survey instrument.

Communications Resources (2)

Usage and Helpfulness of Communications Resources



Contents

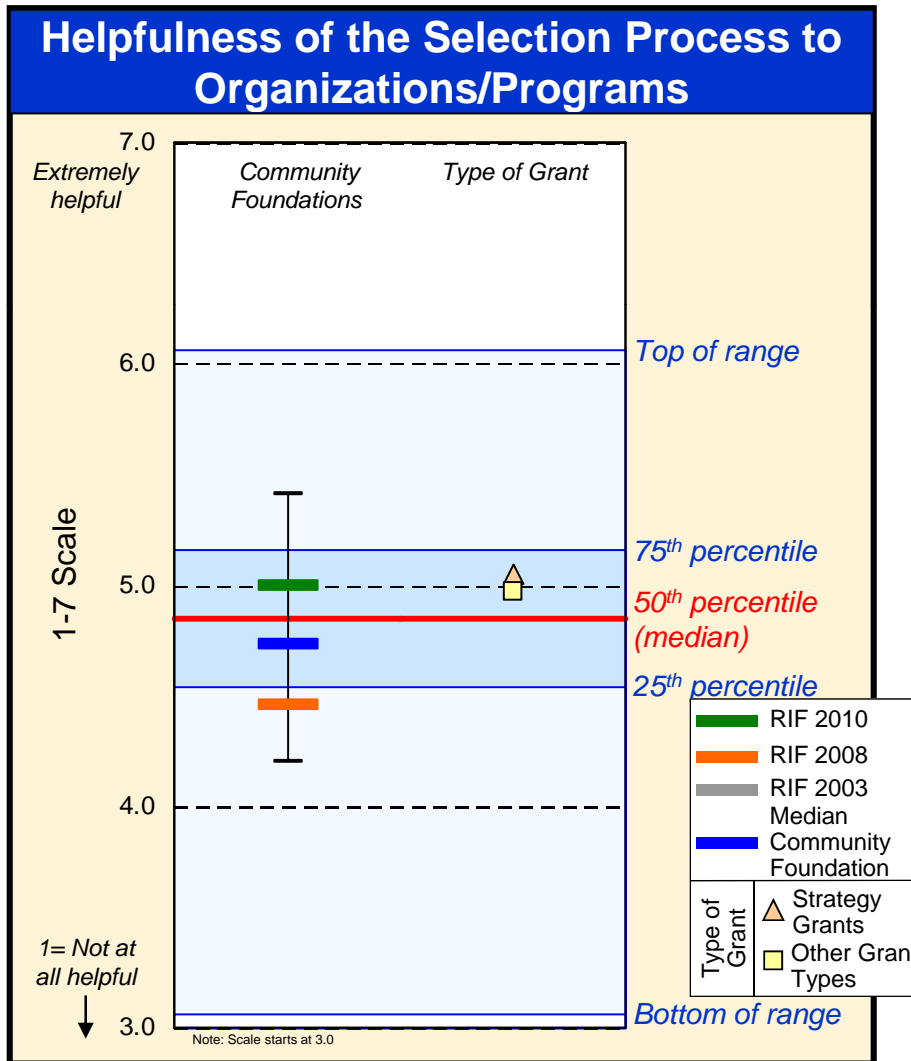
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Helpfulness of Selection Process

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

- above the median funder
- above the median community foundation

Selected Grantee Comments



- ♦ *"It has all been very clear and straightforward, yet I feel the process has also been responsive to understanding my organization's needs and struggles."*
- ♦ *"The grant application process is extremely long. That is the toughest part of working with the Foundation."*
- ♦ *"[Our program officer] was wonderful and easy to work with. She responded immediately to my first call and took time to explain the process and helped me to define the support we needed. I appreciated the opportunity to further explain our request to a few members of the committee at our interview. Most other foundations are impersonal; I send in an application and hope for the best, never getting to talk to the decision makers. I felt that [RIF] was truly interested in learning about our work so they could make a fair decision about supporting our program."*
- ♦ *"Oral communications about direction do not always mesh with grant funding received, which can make the process confusing. Explanations about why proposals do or do not get funded are also confusing."*
- ♦ *"Grant officers are extremely helpful in clarifying difficult grant application questions."*

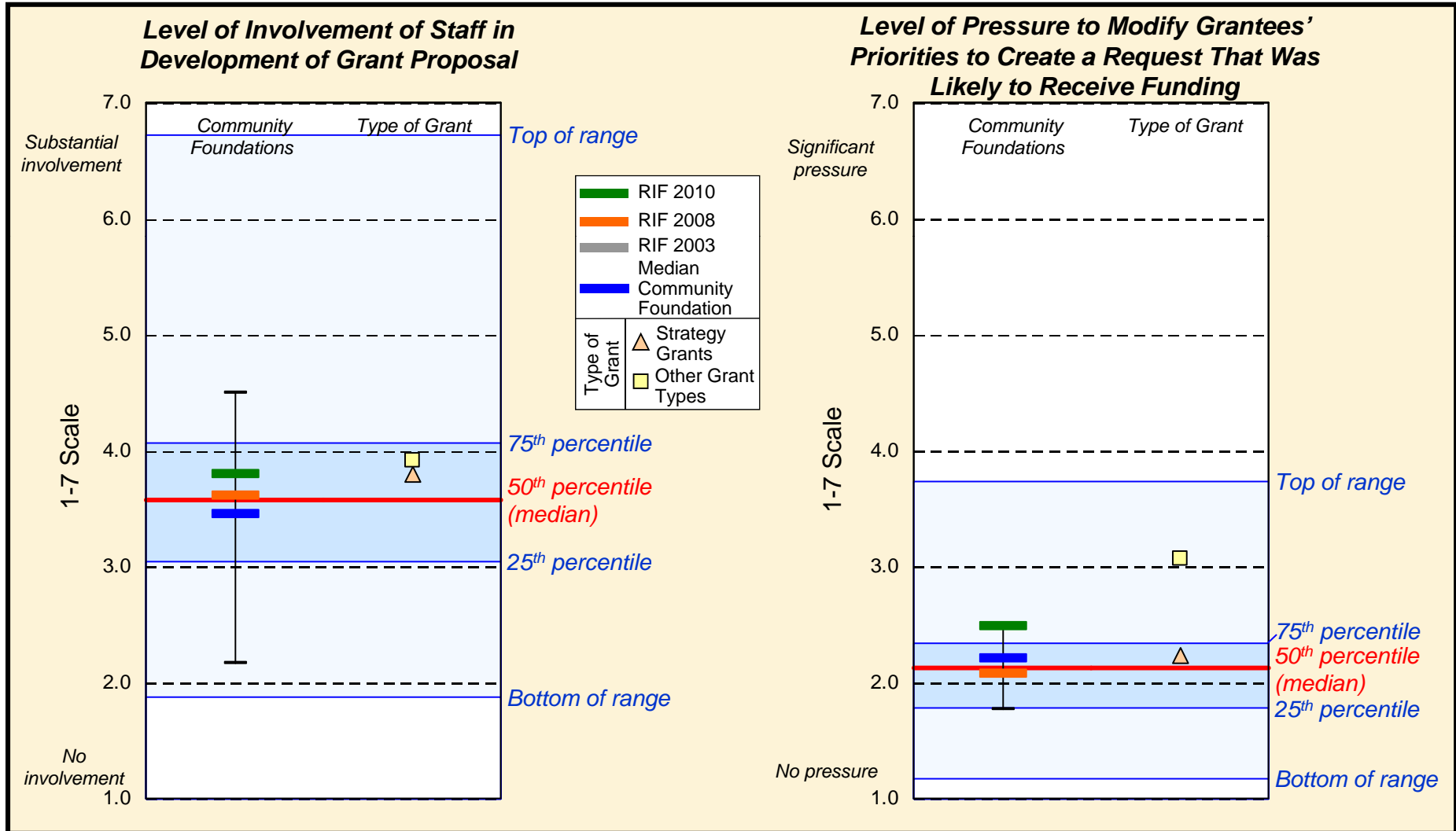
Funder Involvement and Pressure in Selection Process

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

- above the median funder
- above the median community foundation

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

- above the median funder
- above the median community foundation



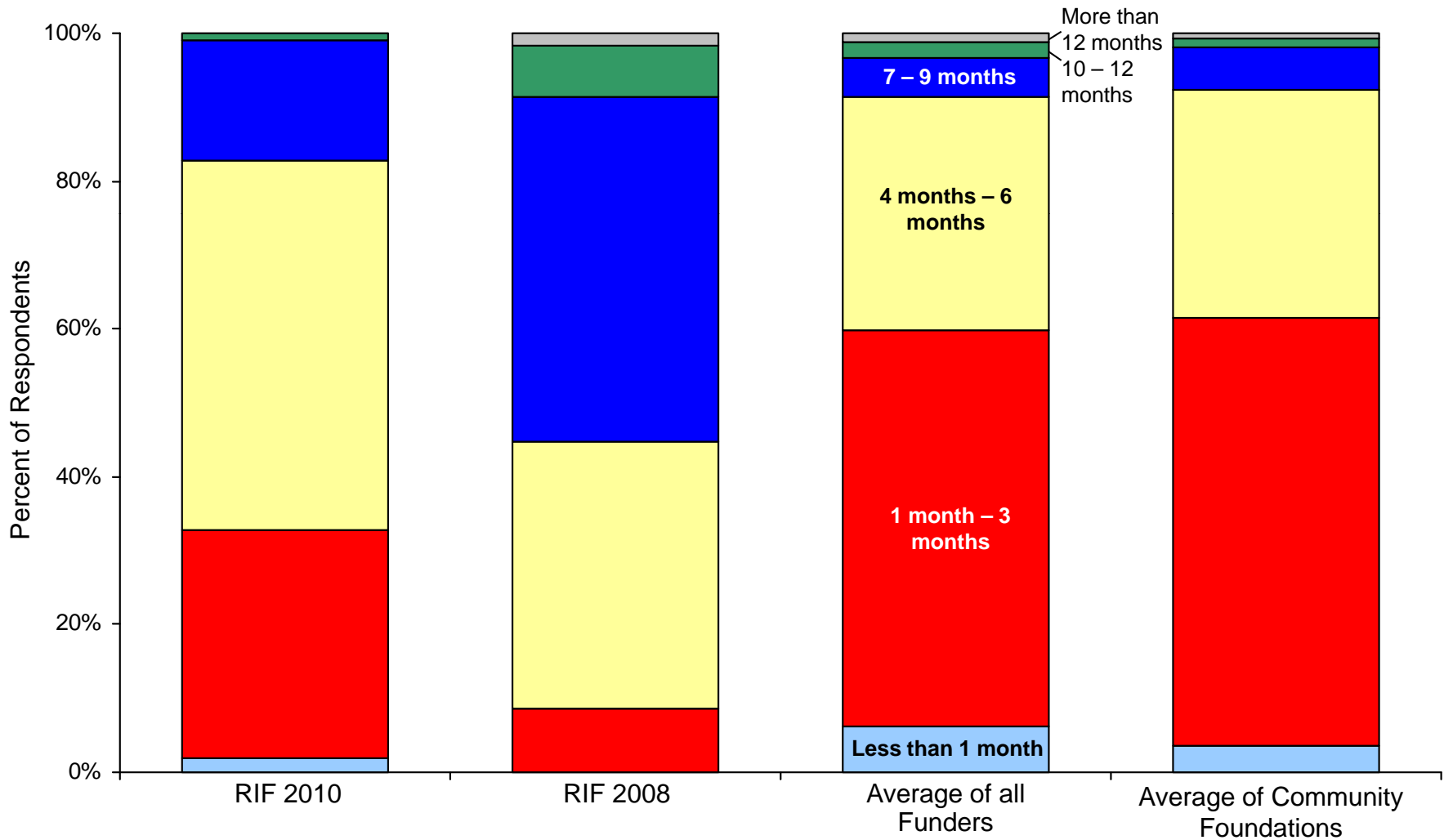
Note: RIF 2003 data not available on both charts due to changes to the survey instrument.

Time Between Submission and Clear Commitment (1)

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

- larger than that of the average funder
- larger than that of the average community foundation

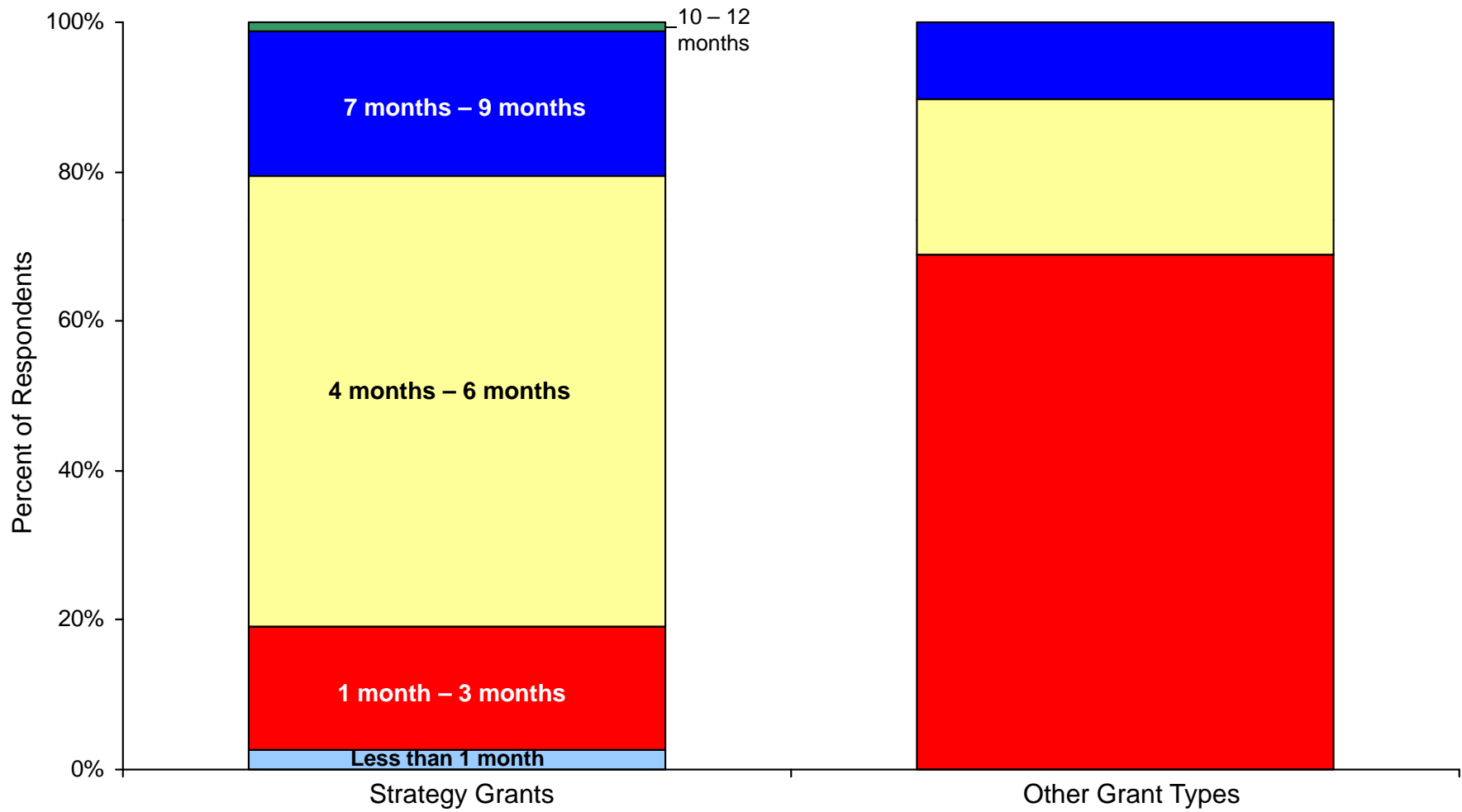
Time Elapsed Between Proposal Submission and Clear Commitment



Note: RIF 2003 data not available due to changes to the survey instrument.

Time Between Submission and Clear Commitment (2)

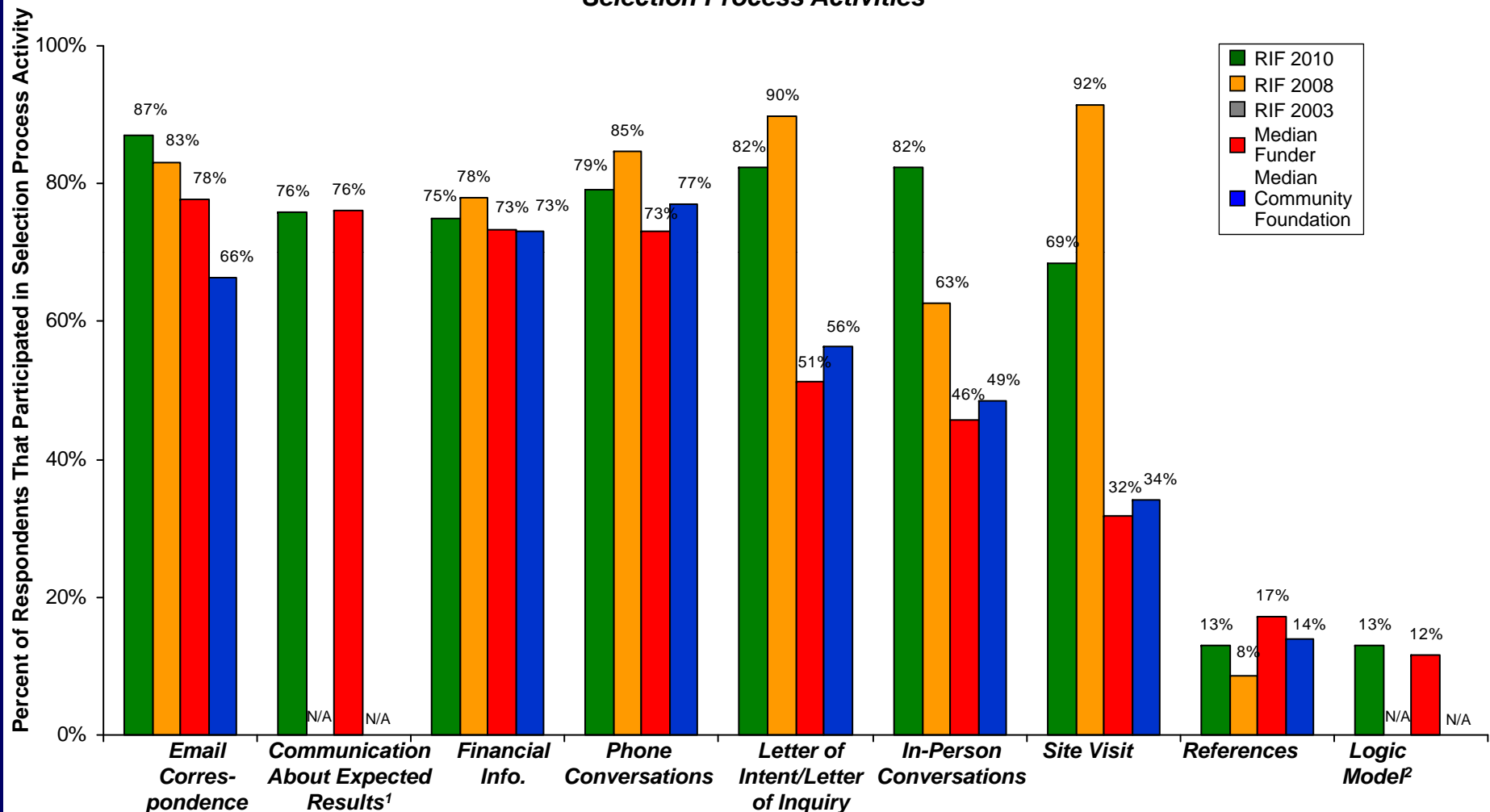
Time Elapsed Between Proposal Submission and Clear Commitment



Selection Process Activities (1)

Compared to grantees of the median philanthropic funder, RIF grantees more frequently report engaging in an LOI process, as well as in-person conversations and site visits with Foundation staff as part of the selection process.

Selection Process Activities

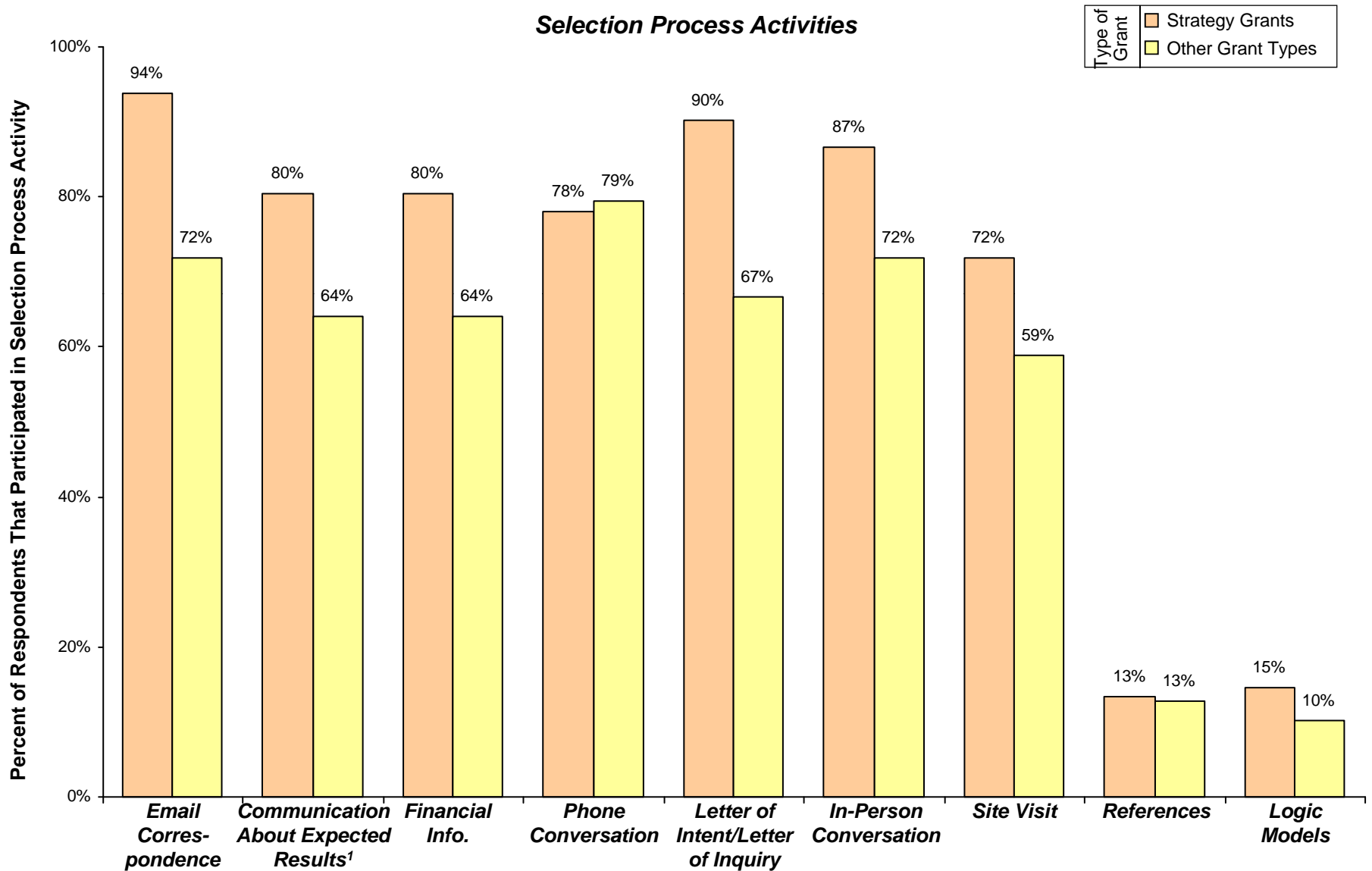


Note: RIF 2003 data not available due to changes in the survey instrument. RIF 2008 data and Community Foundation data on “Communication About Expected Results” and “Logic Model” not available due to changes to the survey instrument.

1: Represents data from 30 funders.
2: Represents data from 16 funders.

Selection Process Activities (2)

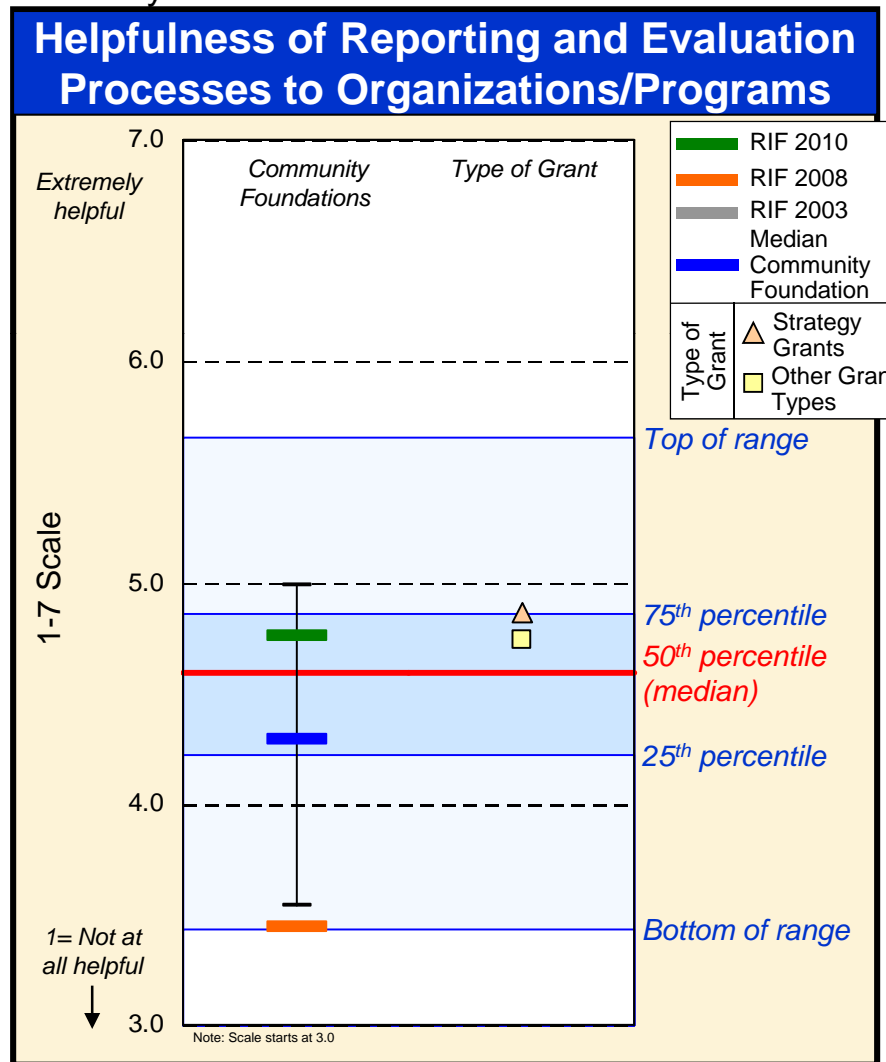
Selection Process Activities



Helpfulness of Reporting and Evaluation Processes

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

- above the median funder
- above the median community foundation



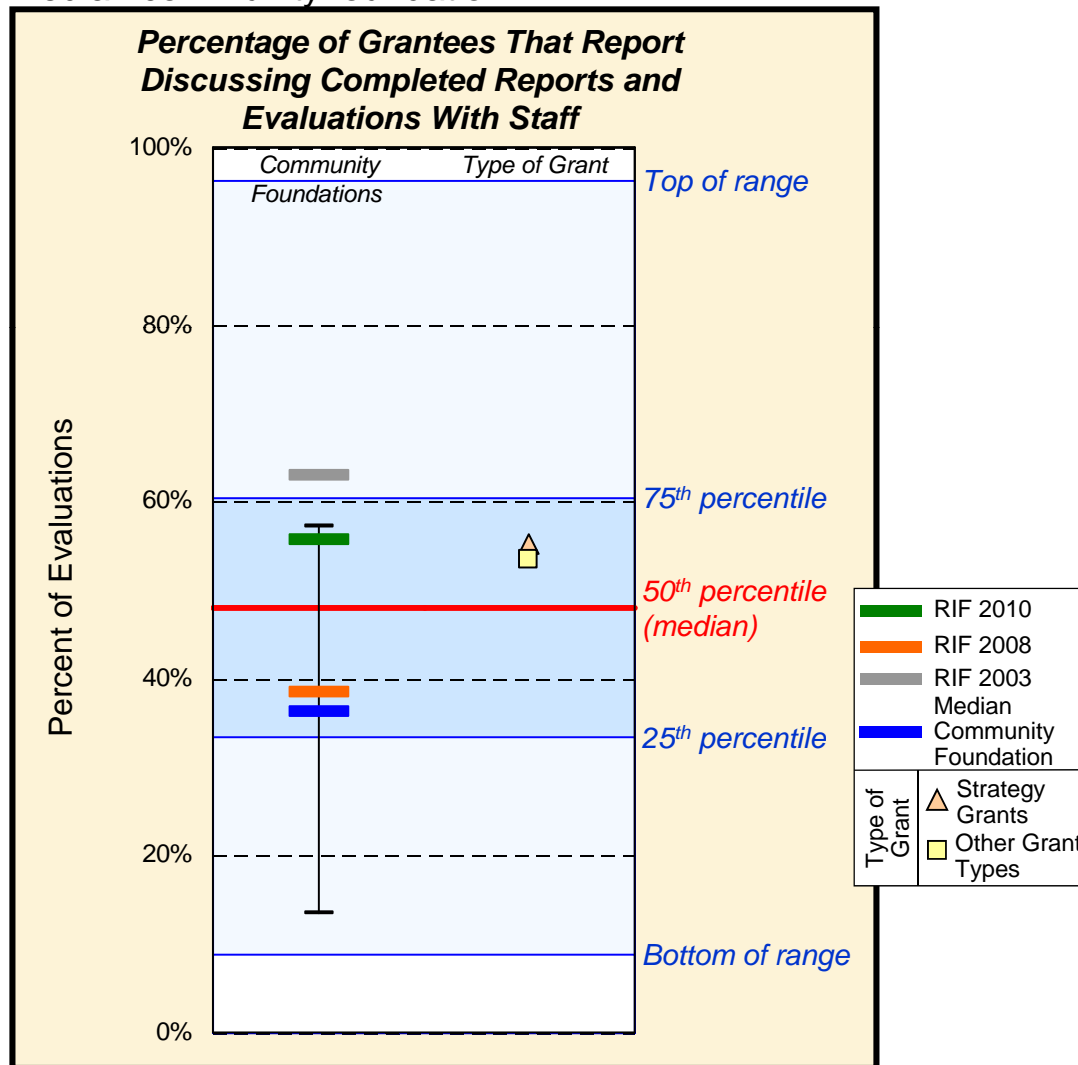
Note: This question was only asked of those grantees that had participated in a reporting or evaluation process by the time they took the survey. For RIF 2010, 42 percent of grantees indicated that they had participated in a reporting or evaluation process by the time they took the survey, compared to 62 percent at the median funder and 58 percent at the median community foundation.

Note: RIF 2003 data not available due to changes to the survey instrument.

Reporting and Evaluation Processes

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

- larger than that of the median funder
- larger than that of the median community foundation

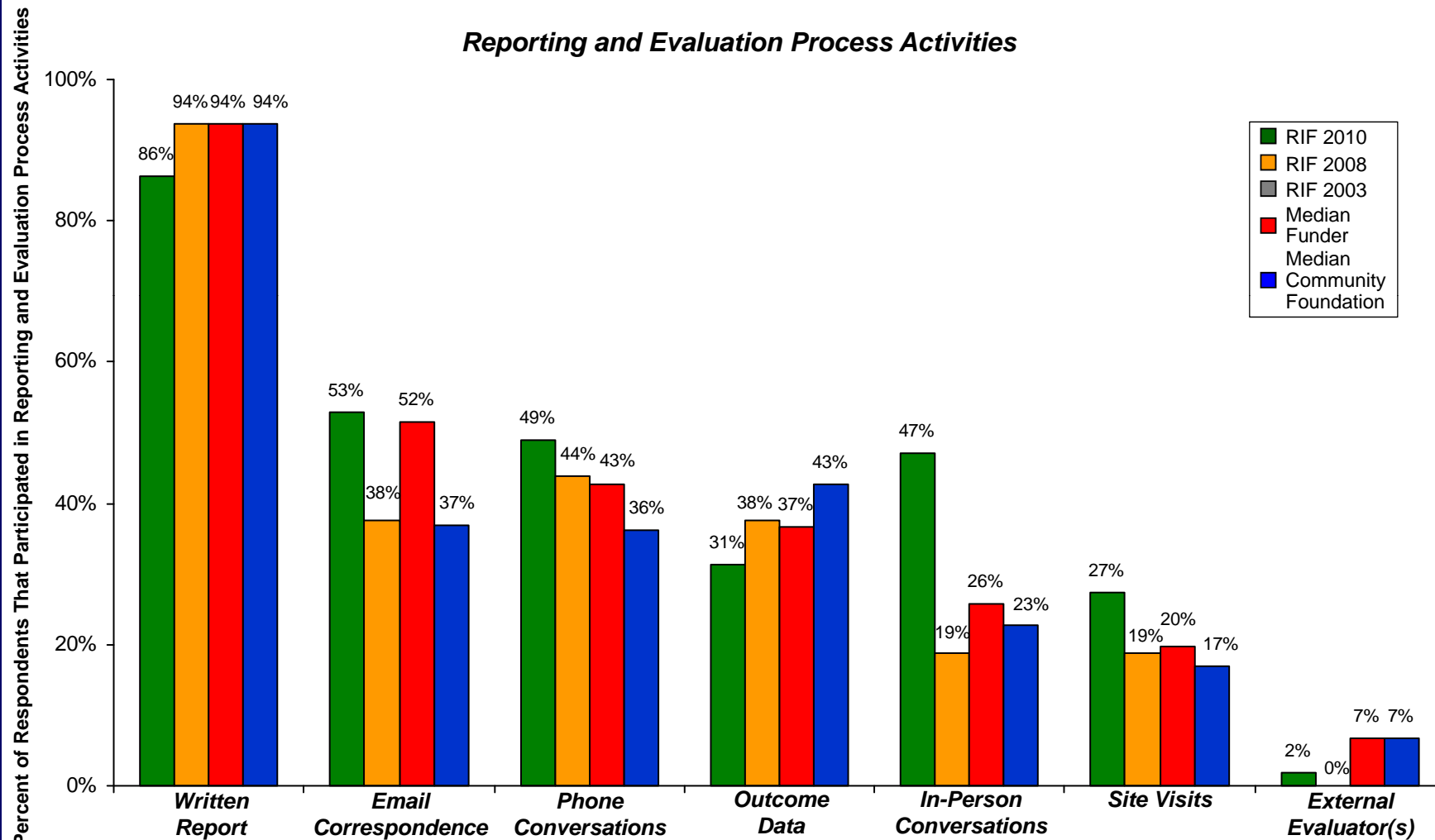


Note: This question was only asked of those grantees that had participated in a reporting or evaluation process by the time they took the survey. For RIF 2010, 42 percent of grantees indicated that they had participated in a reporting or evaluation process by the time they took the survey, compared to 62 percent at the median funder and 58 percent at the median community foundation.

Reporting and Evaluation Process Activities (1)

RIF grantees more frequently report engaging in phone and in-person conversations with Foundation staff, and receiving site visits as part of the reporting and evaluation processes than is typical.

Reporting and Evaluation Process Activities

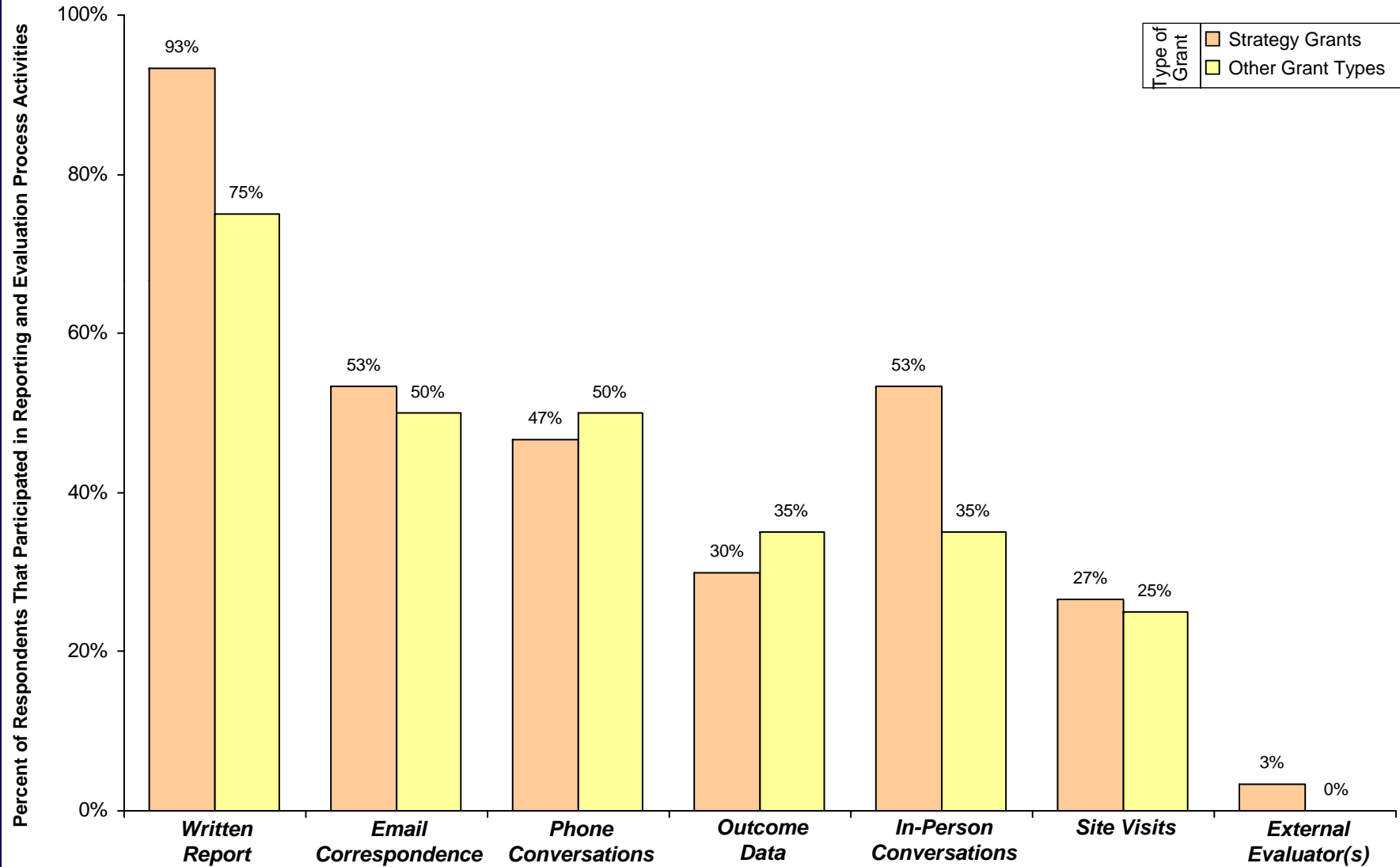


Note: This question was only asked of those grantees that had participated in a reporting or evaluation process by the time they took the survey. For RIF 2010, 42 percent of grantees indicated that they had participated in a reporting or evaluation process by the time they took the survey, compared to 62 percent at the median funder and 58 percent at the median community foundation.

Note: RIF 2003 data not available due to changes in the survey instrument.

Reporting and Evaluation Process Activities (2)

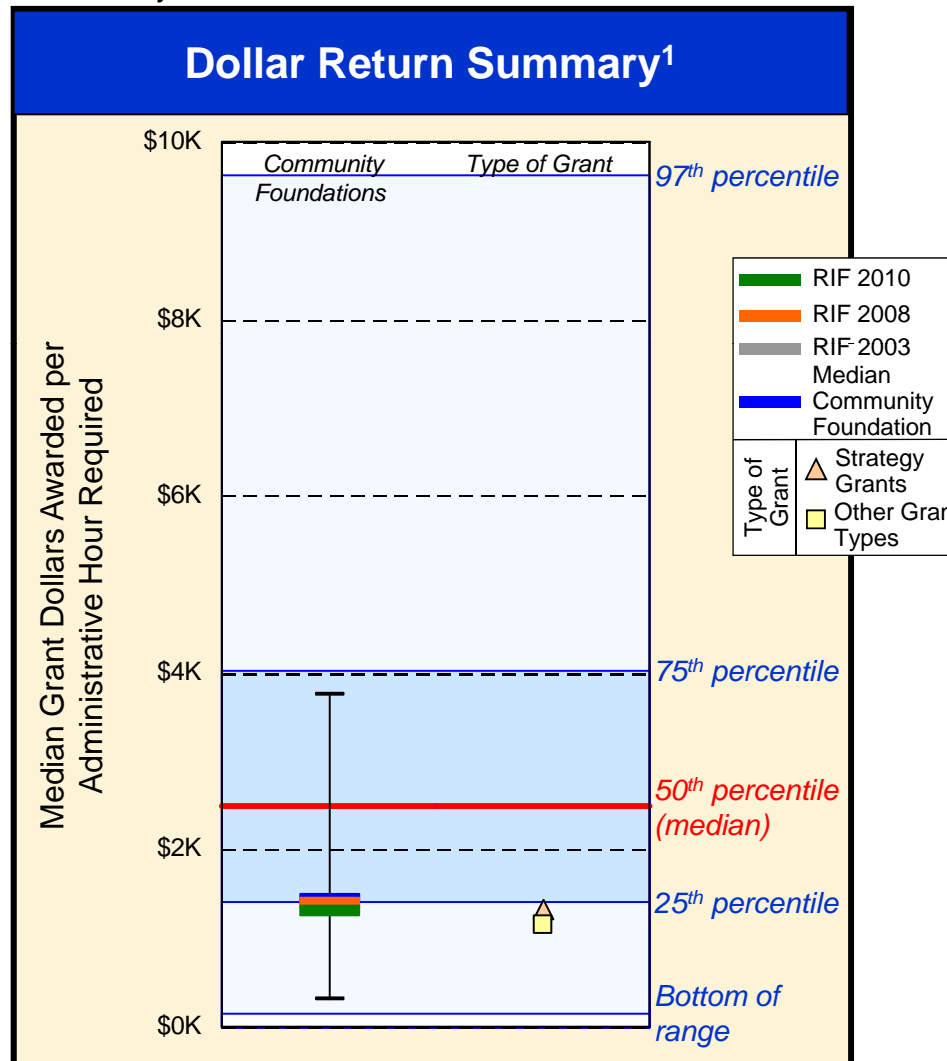
Reporting and Evaluation Process Activities



Dollar Return Summary

This summary measure includes the total grant dollars awarded and the total time necessary to fulfill the administrative requirements over the lifetime of the grant. At the median, the number of dollars awarded per hour of administrative time spent by RIF grantees is:

- less than that of the median funder
- similar to that of the median community foundation



Note: RIF 2003 data not available due to changes to the survey instrument.

1: Dollar Return on Grantee Administrative Hours is calculated for each grantee and aggregated by philanthropic funder for the Dollar Return Summary. Chart does not show data from seven funders whose Dollar Return on Grantee Administrative Hours exceeds \$10K.

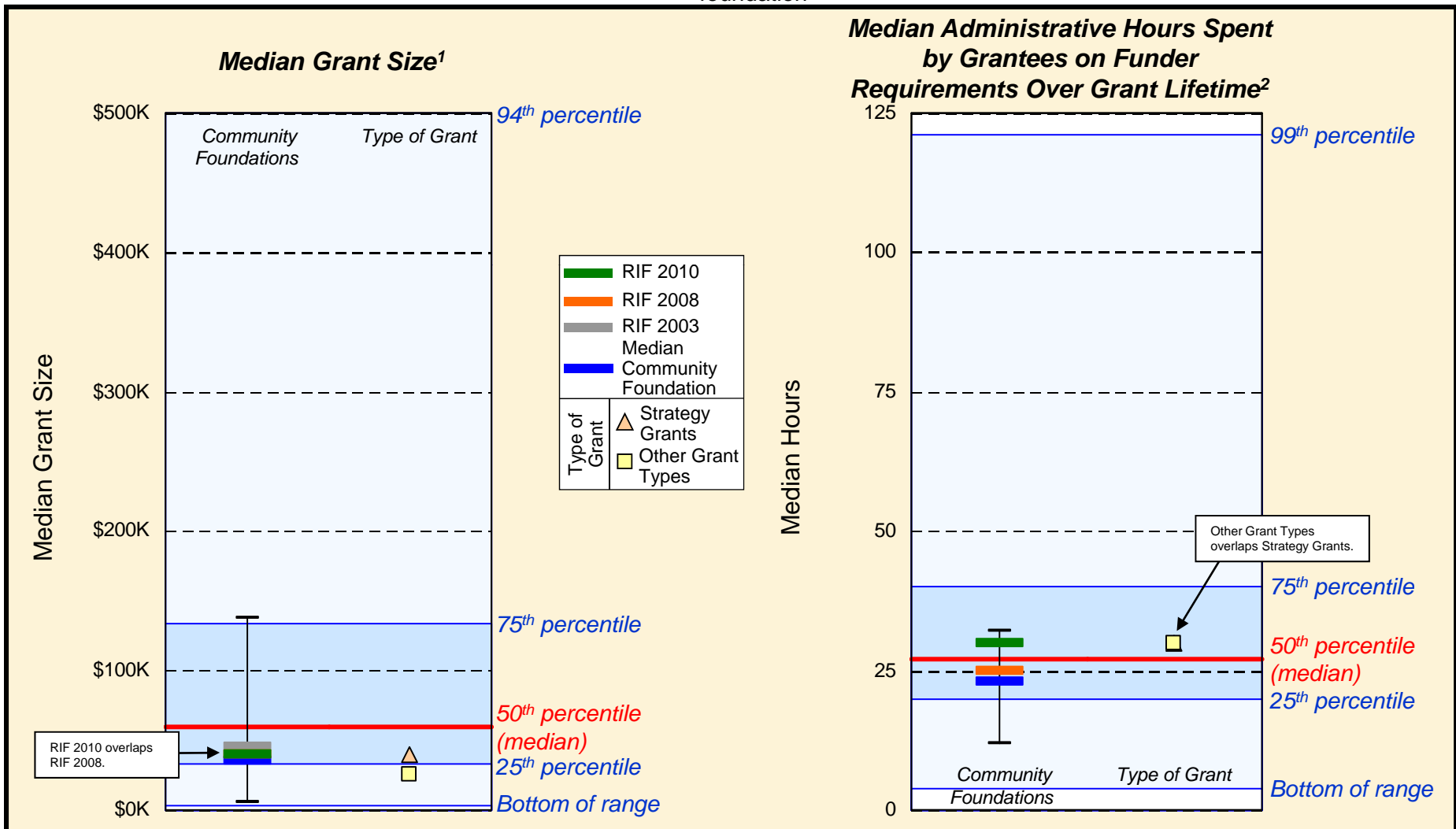
Grant Size and Administrative Time

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

- smaller than that of the median funder
- similar to that of the median community foundation

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

- similar to the time spent by grantees of the median funder
- greater than the time spent by grantees of the median community foundation



Note: RIF 2003 data not available for "Median Administrative Hours Spent by Grantees on Funder Requirements Over Grant Lifetime" due to changes to the survey instrument.

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

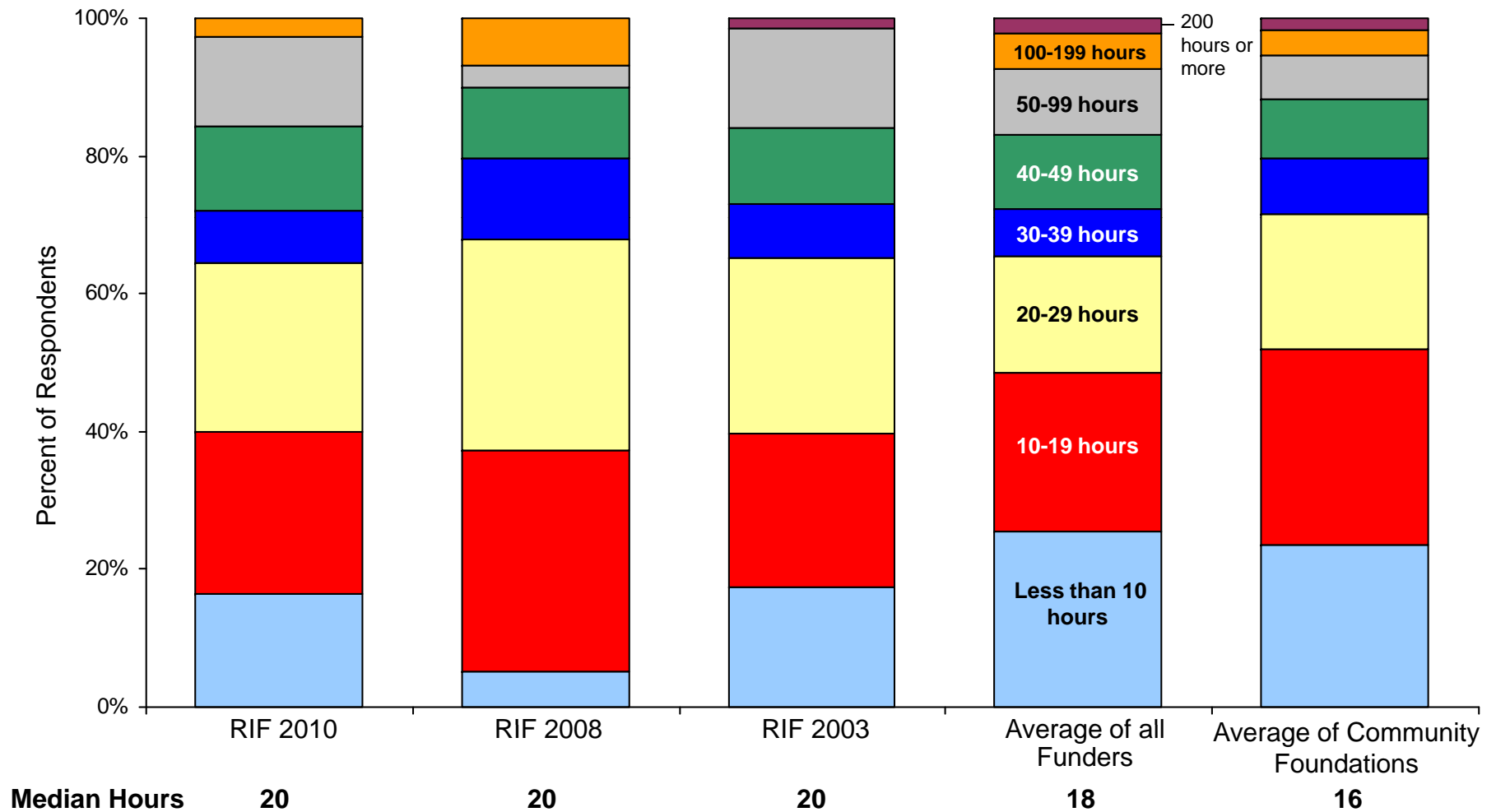
2: Chart displays total grant proposal creation, evaluation, and monitoring hours spent over the life of the grant; each of these events did not necessarily occur for each individual grantee. Chart does not show data from one funder whose median administrative hours exceeds 125 hours.

Administrative Time – Proposal and Selection Process (1)

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

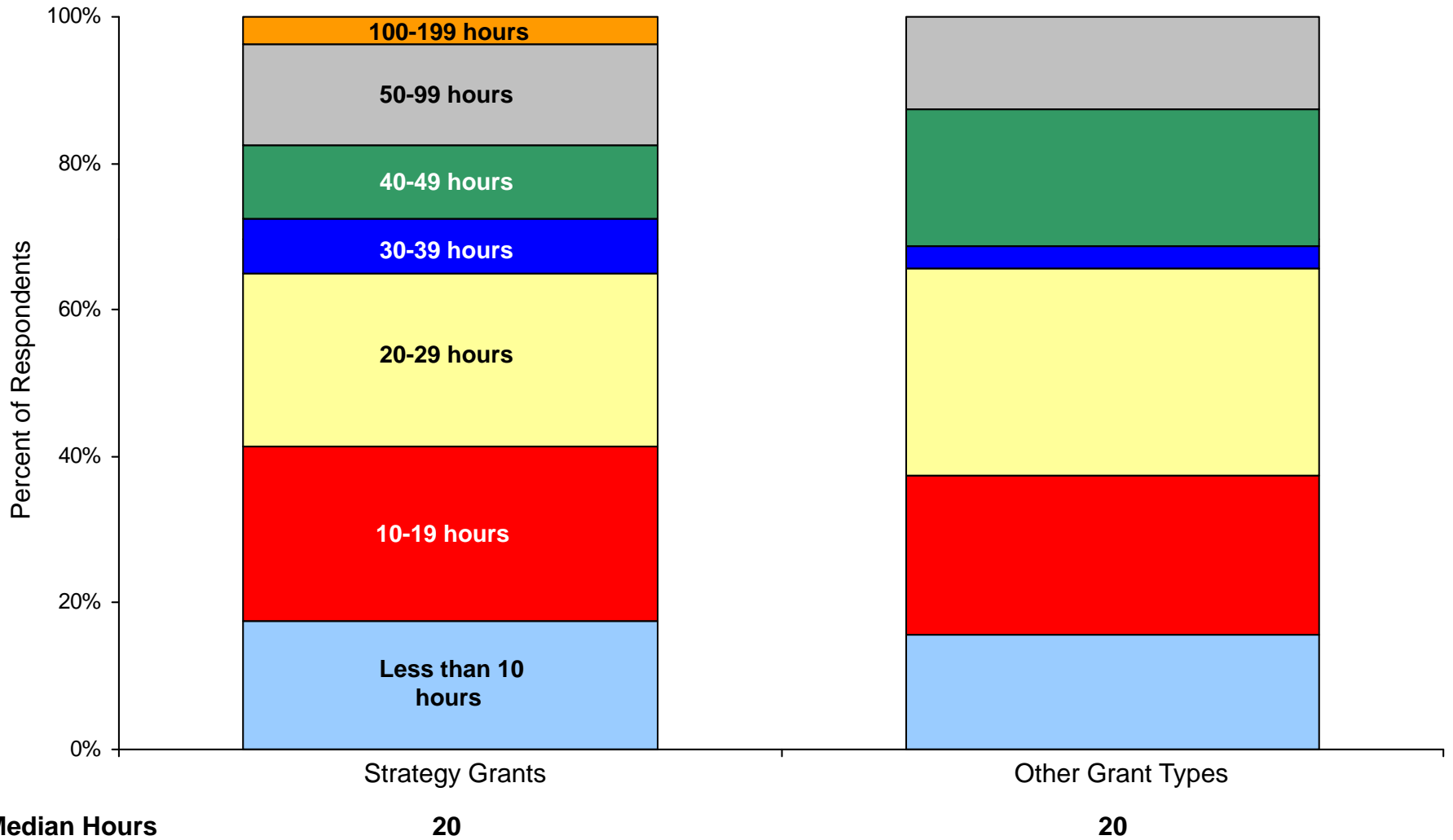
- similar to the time spent by grantees of the median funder
- greater than the time spent by grantees of the median community foundation

Median Administrative Hours Spent by Grantees on Proposal and Selection Process



Administrative Time – Proposal and Selection Process (2)

Median Administrative Hours Spent by Grantees on Proposal and Selection Process

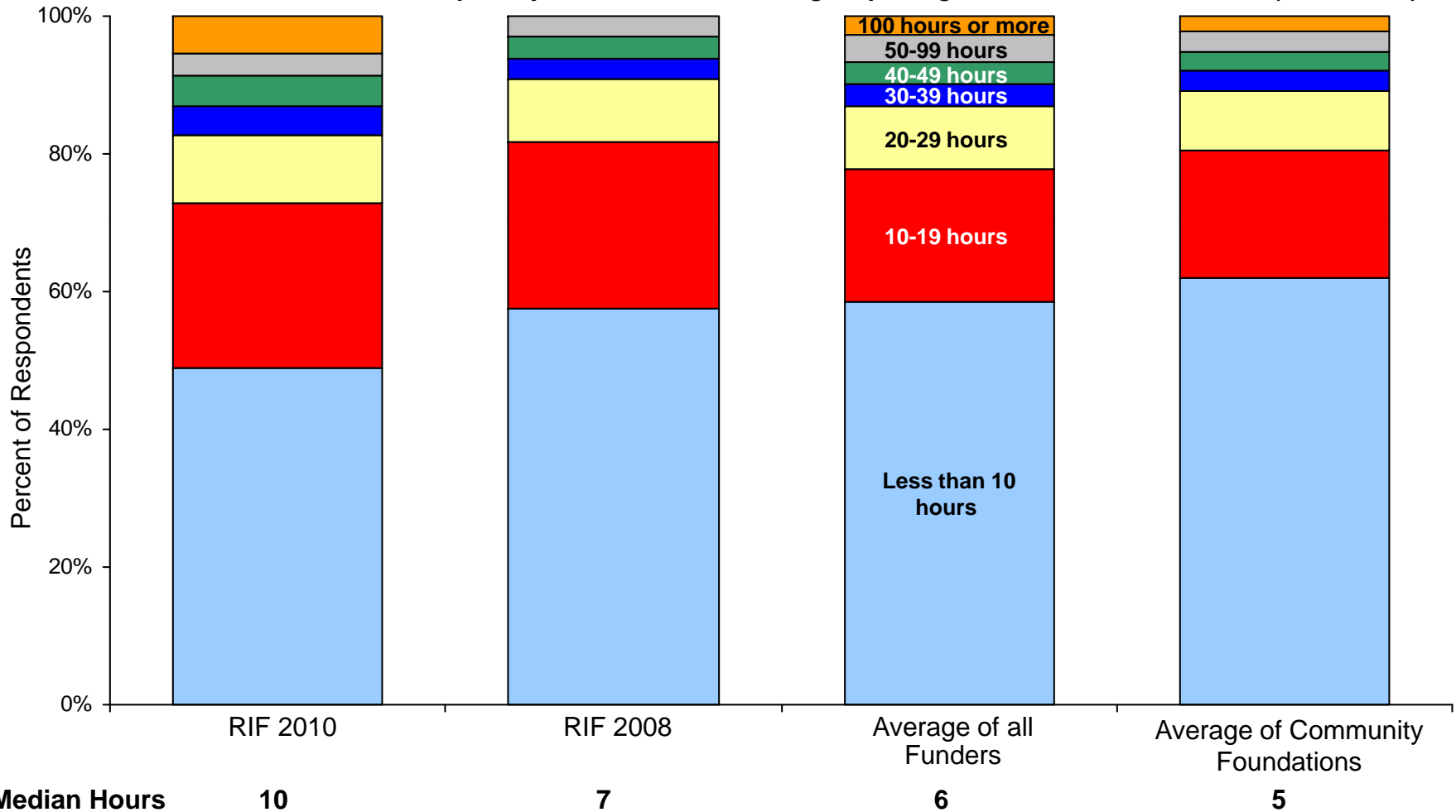


Administrative Time – Reporting and Evaluation Processes (1)

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

- greater than the time spent by grantees of the median funder
- greater than the time spent by grantees of the median community foundation

Median Administrative Hours Spent by Grantees on Monitoring, Reporting, and Evaluation Processes (Annualized)¹

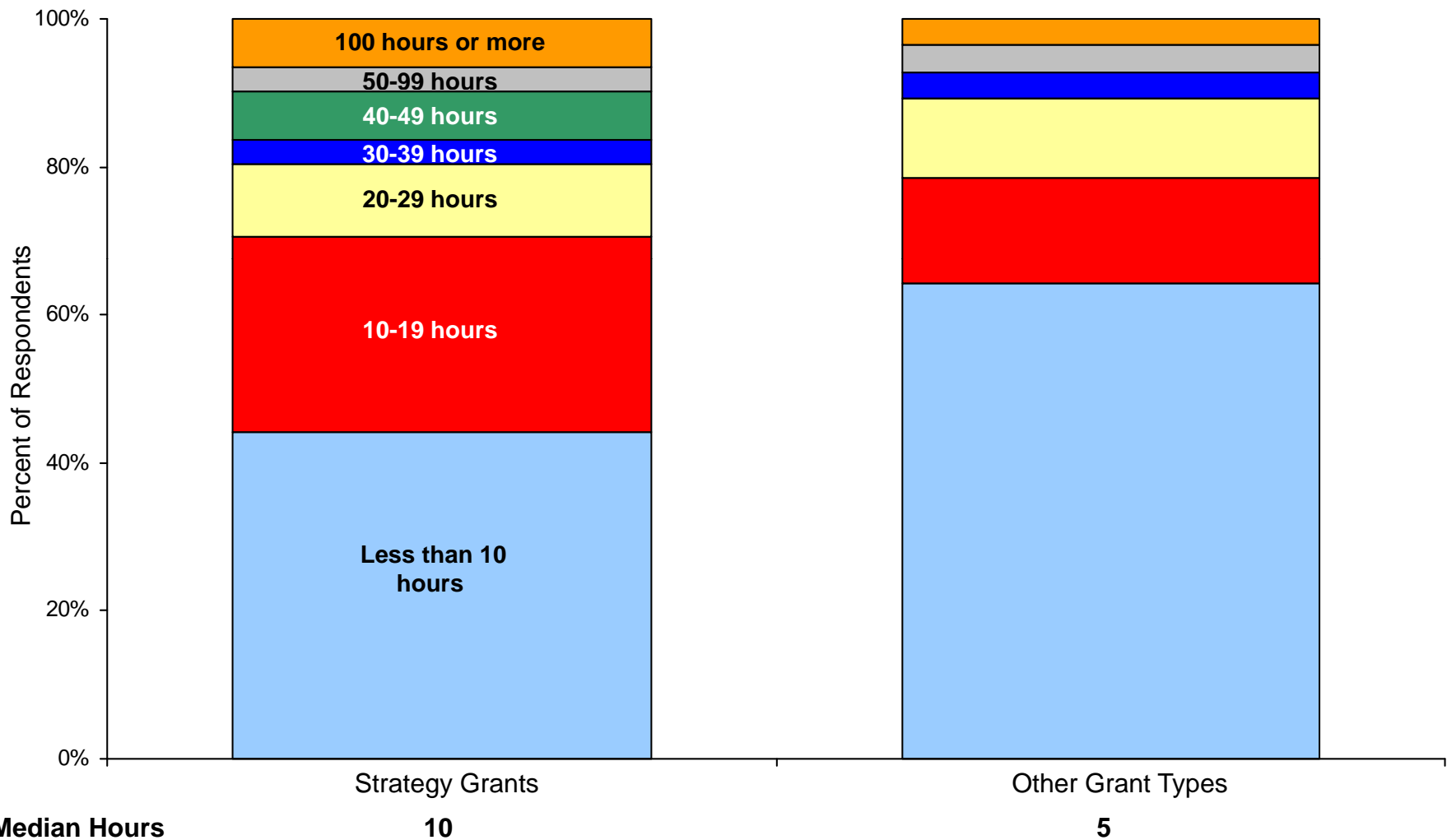


¹: "Evaluation" in the survey includes any activity considered by grantees to be part of an evaluation, and does not necessarily correspond to the Foundation's definition.

Note: RIF 2003 data not available due to changes to the survey instrument.

Administrative Time – Reporting and Evaluation Processes (2)

Median Administrative Hours Spent by Grantees on Monitoring, Reporting, and Evaluation Processes (Annualized)¹



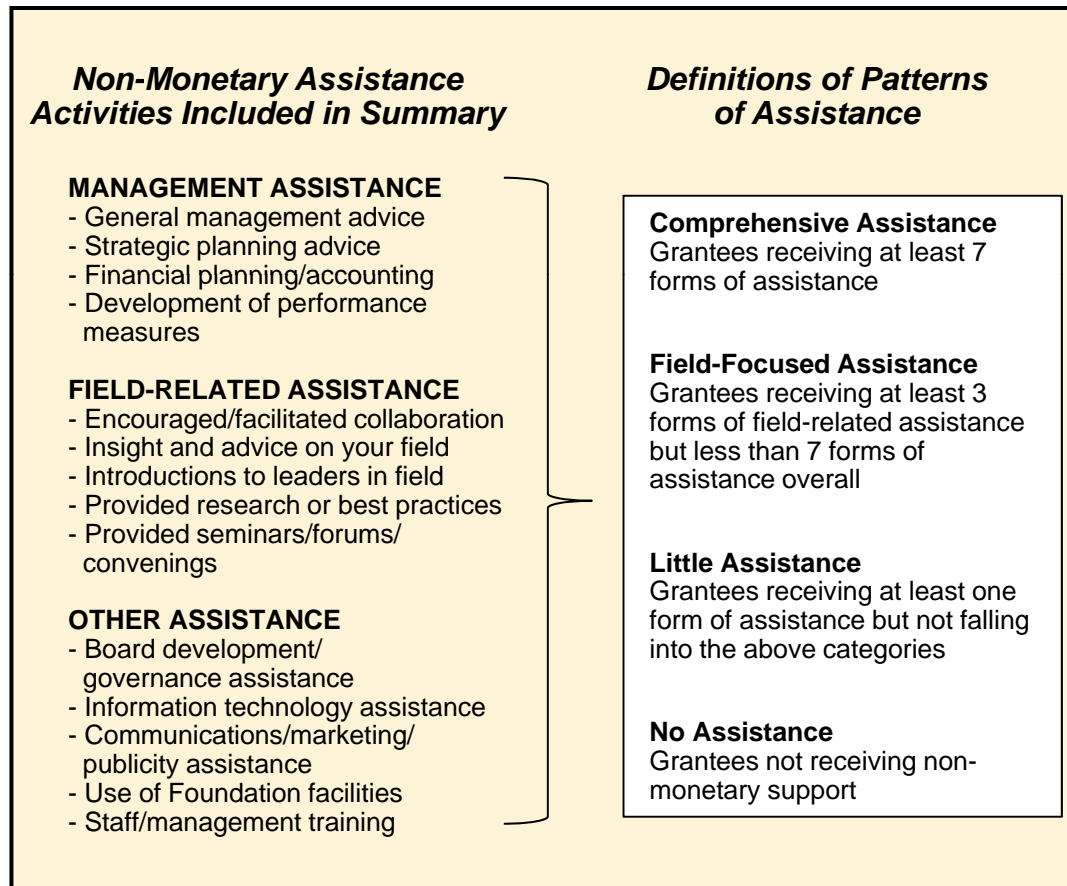
¹: "Evaluation" in the survey includes any activity considered by grantees to be part of an evaluation, and does not necessarily correspond to the Foundation's definition.

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Non-Monetary Assistance Summary (1)

The non-monetary assistance summary includes the fourteen activities listed below. Provision of assistance patterns fall into the four categories: comprehensive assistance, field-focused assistance, little assistance, and no assistance.

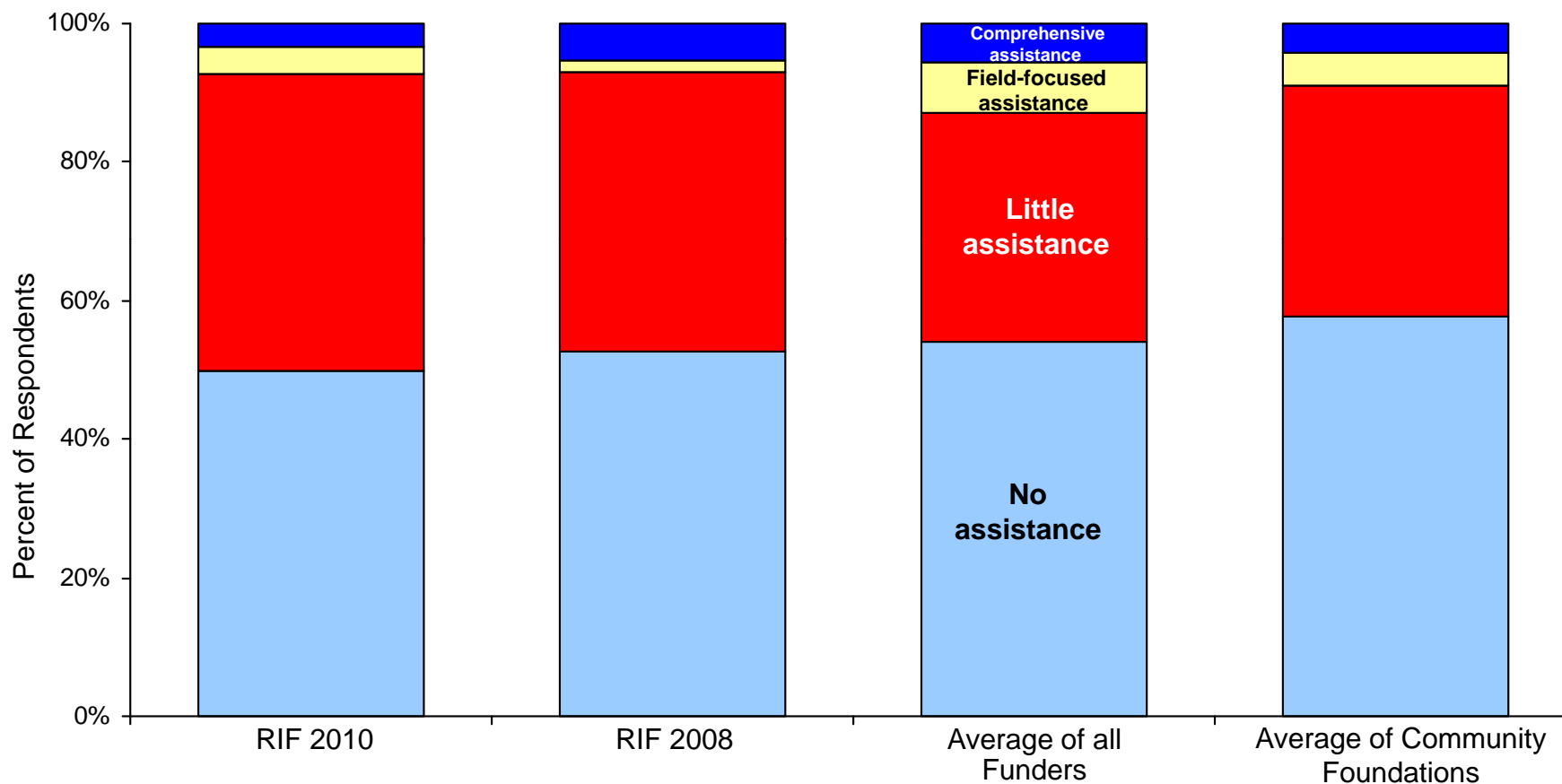


Non-Monetary Assistance Summary (2)

The proportion of RIF grantees that report receiving comprehensive or field-focused assistance is:

- similar to that of the median funder
- similar to that of the median community foundation

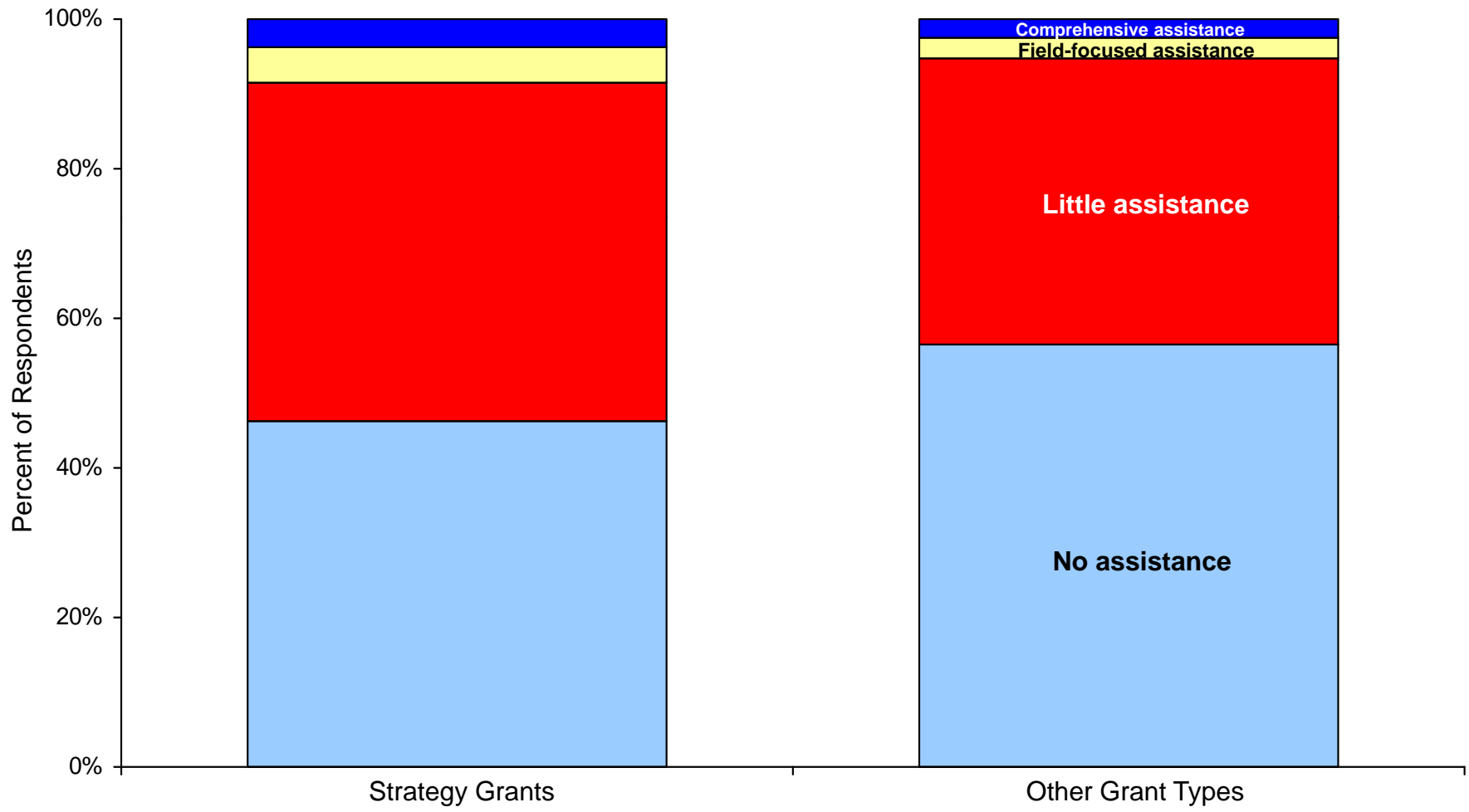
Non-Monetary Assistance Patterns



Survey-Wide Analysis Fact: Providing just two or three types of assistance appears to be ineffective; it is only in the minority of cases when grantees receive either a comprehensive set of assistance activities or a set of mainly field-focused types of assistance that they have a substantially more positive and productive experience with their foundation funders than grantees receiving no assistance. For more information on these findings, please see CEP's report, *More than Money: Making a Difference with Assistance Beyond the Grant Check*.

Non-Monetary Assistance Summary (3)

Non-Monetary Assistance Patterns

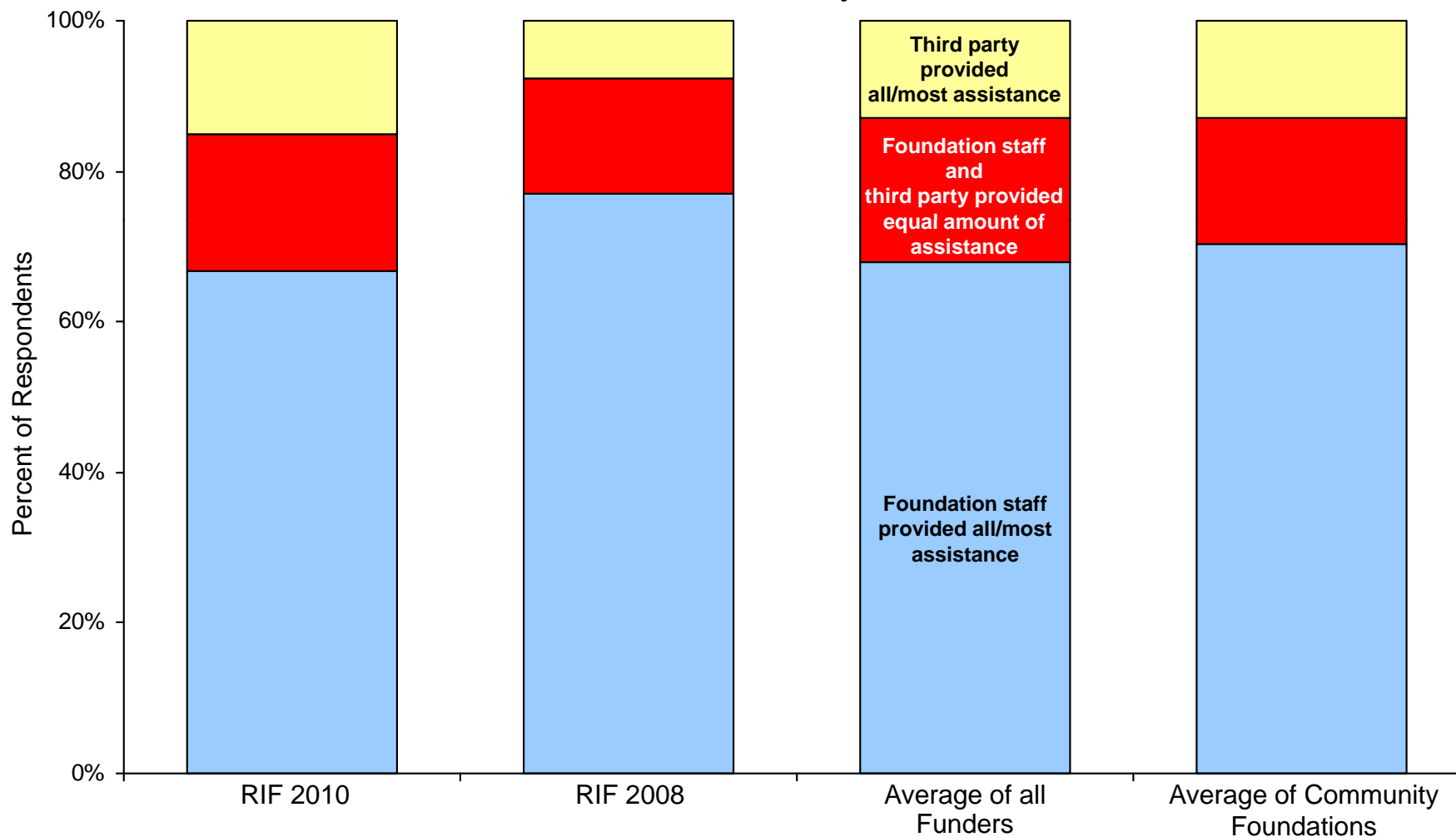


Who Provided Non-Monetary Assistance (1)

The proportion of RIF grantees that report that Foundation staff provided all or most of the assistance they received is:

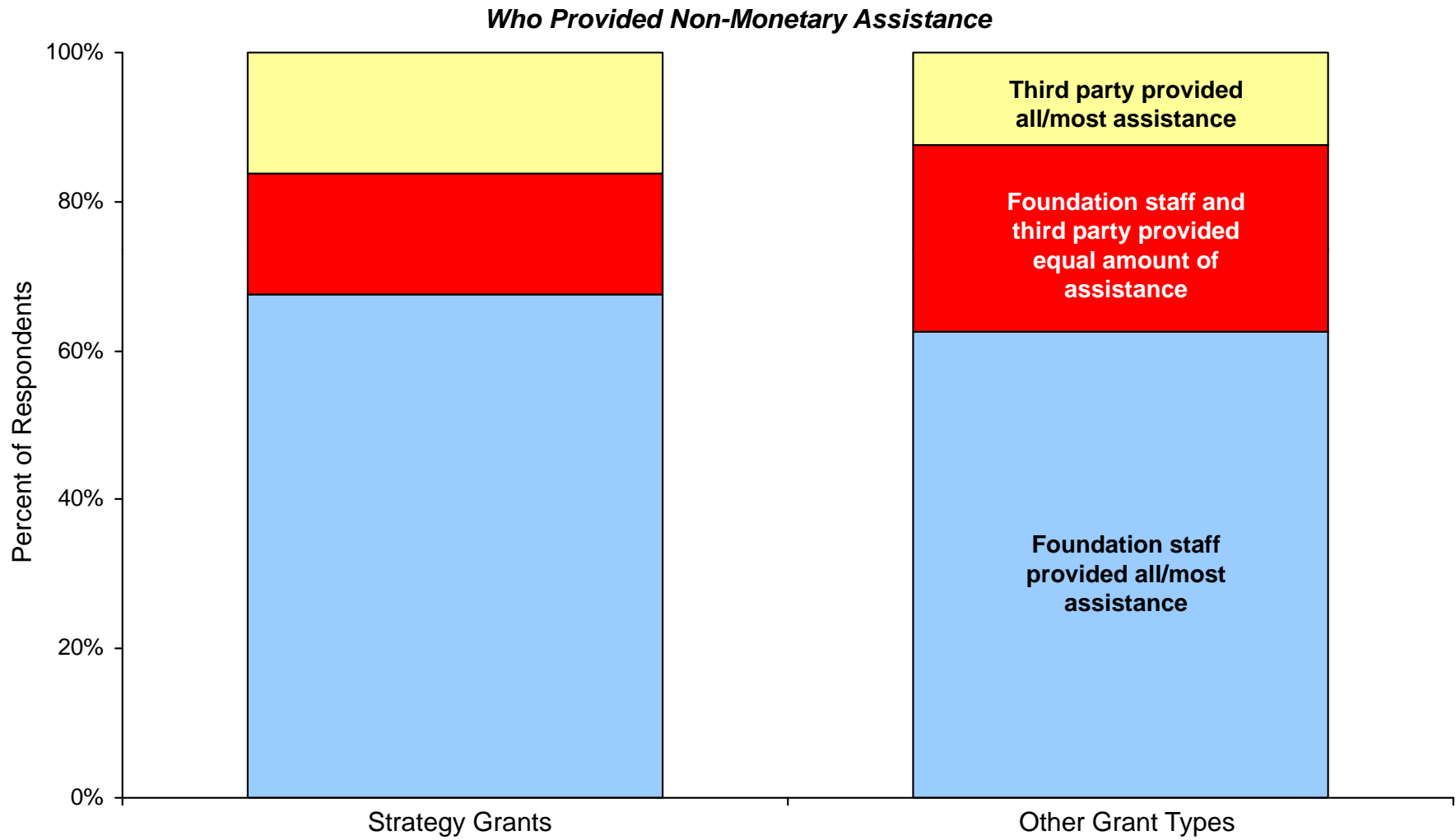
- similar to that of the average funder
- similar to that of the average community foundation

Who Provided Non-Monetary Assistance



Note: RIF 2003 data not available due to changes to the survey instrument.

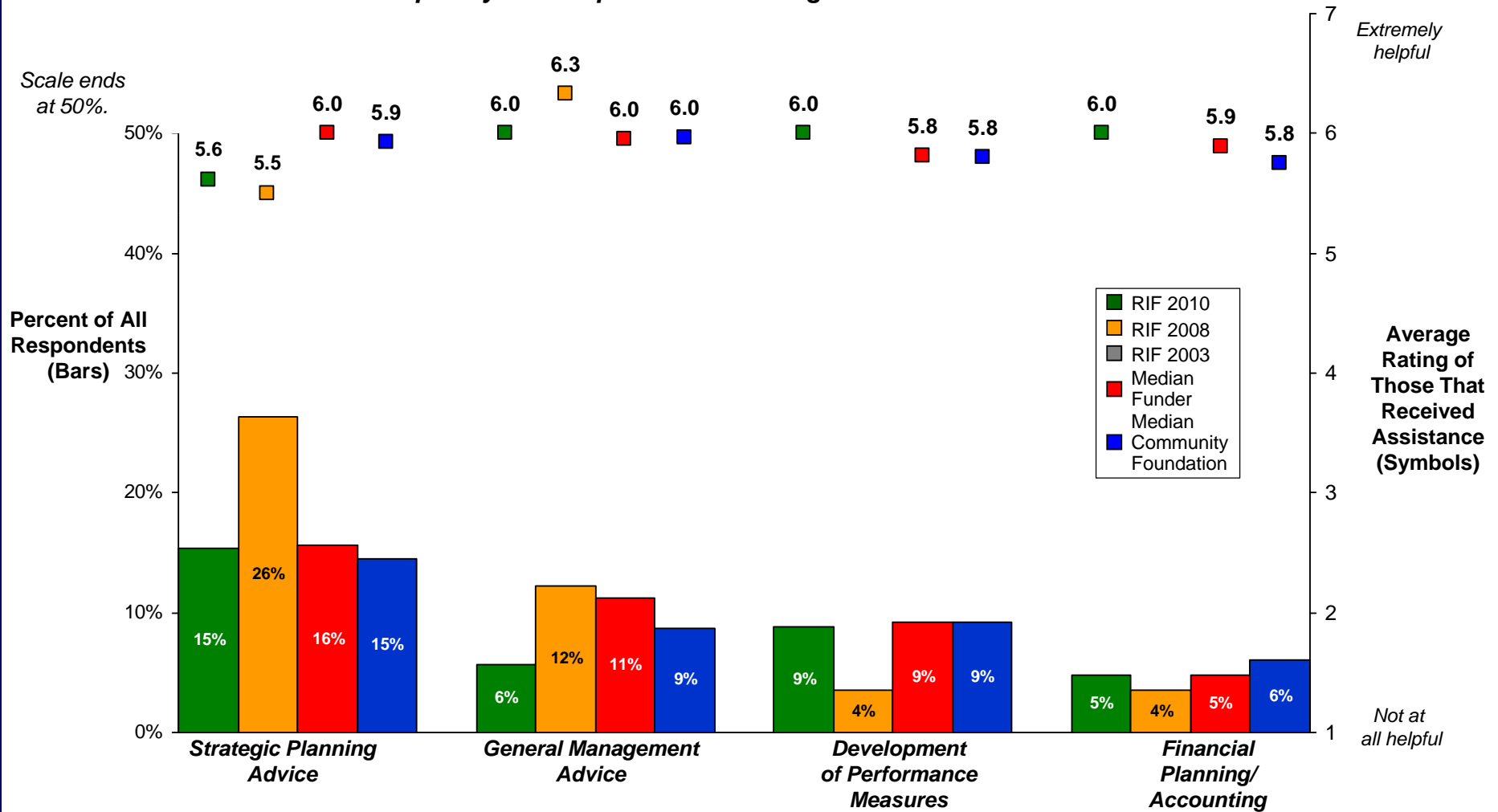
Who Provided Non-Monetary Assistance (2)



Management Assistance Activities & Helpfulness (1)

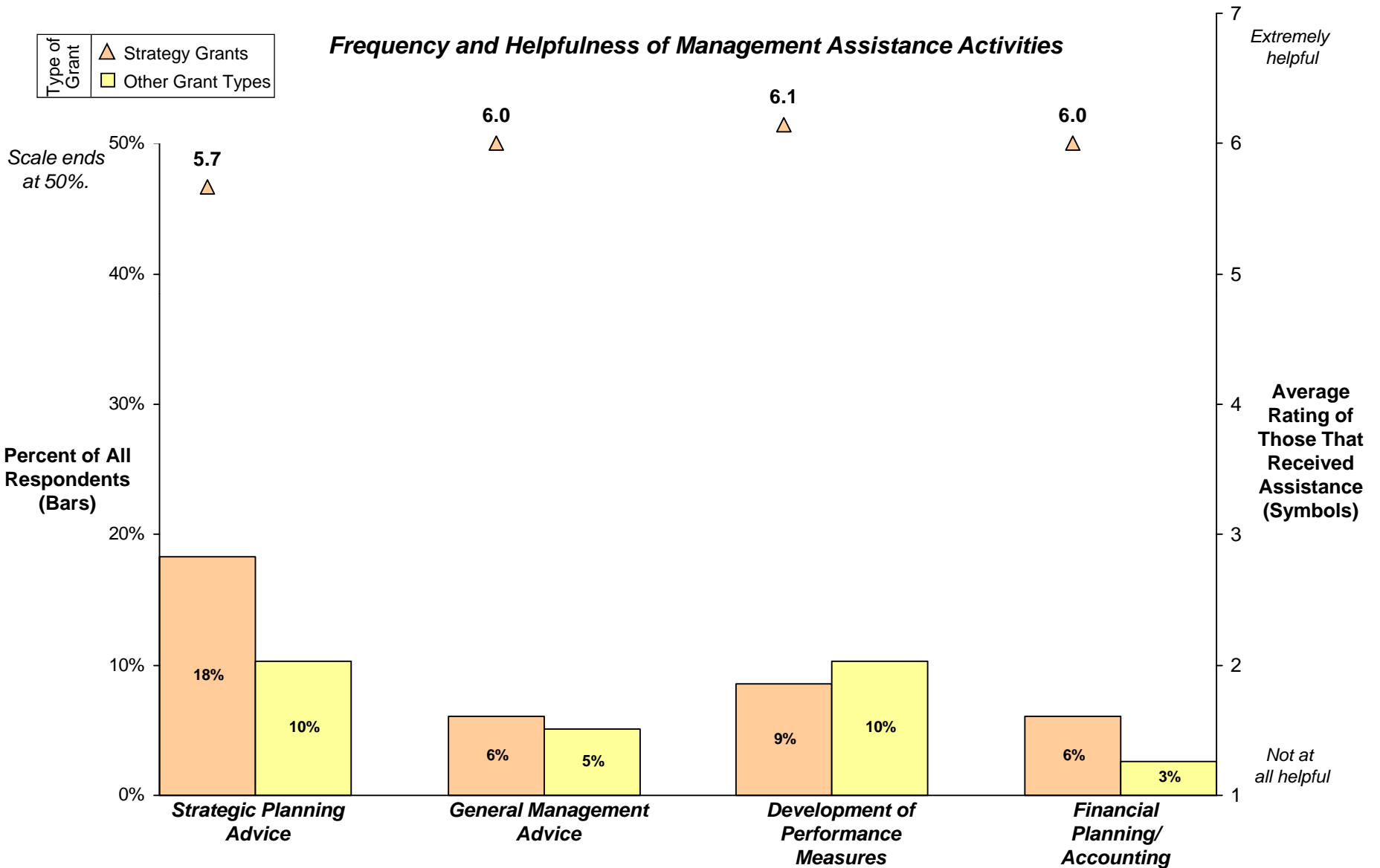
A similar proportion of RIF grantees report receiving management assistance compared to grantees of other philanthropic funders.

Frequency and Helpfulness of Management Assistance Activities



Note: RIF 2008 helpfulness ratings not shown because fewer than five responses to the question were received.
 Note: RIF 2003 data not available due to changes in the survey instrument.

Management Assistance Activities & Helpfulness (2)

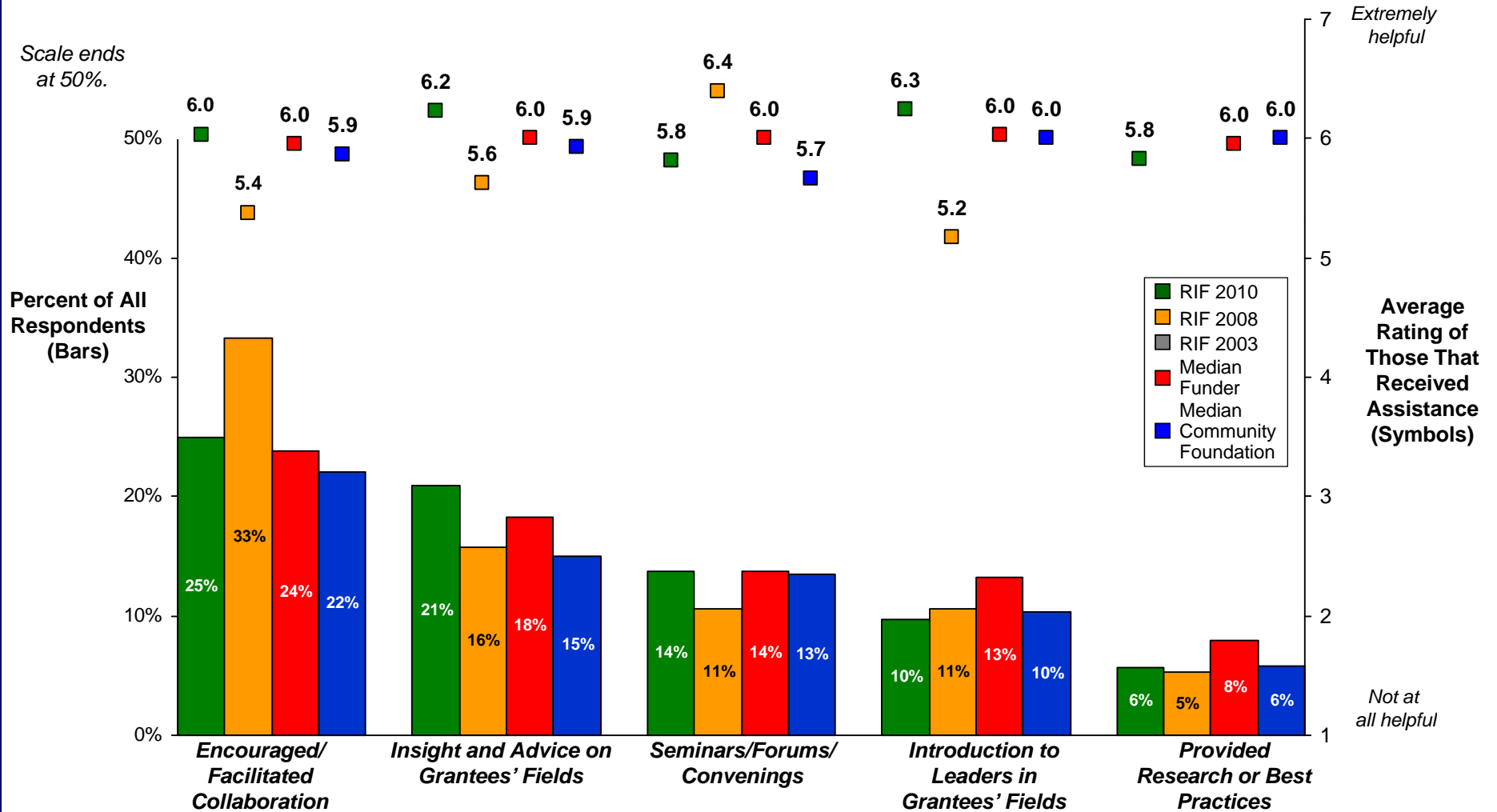


Note: Other Grant Types helpfulness ratings not shown because fewer than five responses to the question were received. **CONFIDENTIAL** | © The Center for Effective Philanthropy | 6/25/2010

Field-Related Assistance Activities & Helpfulness (1)

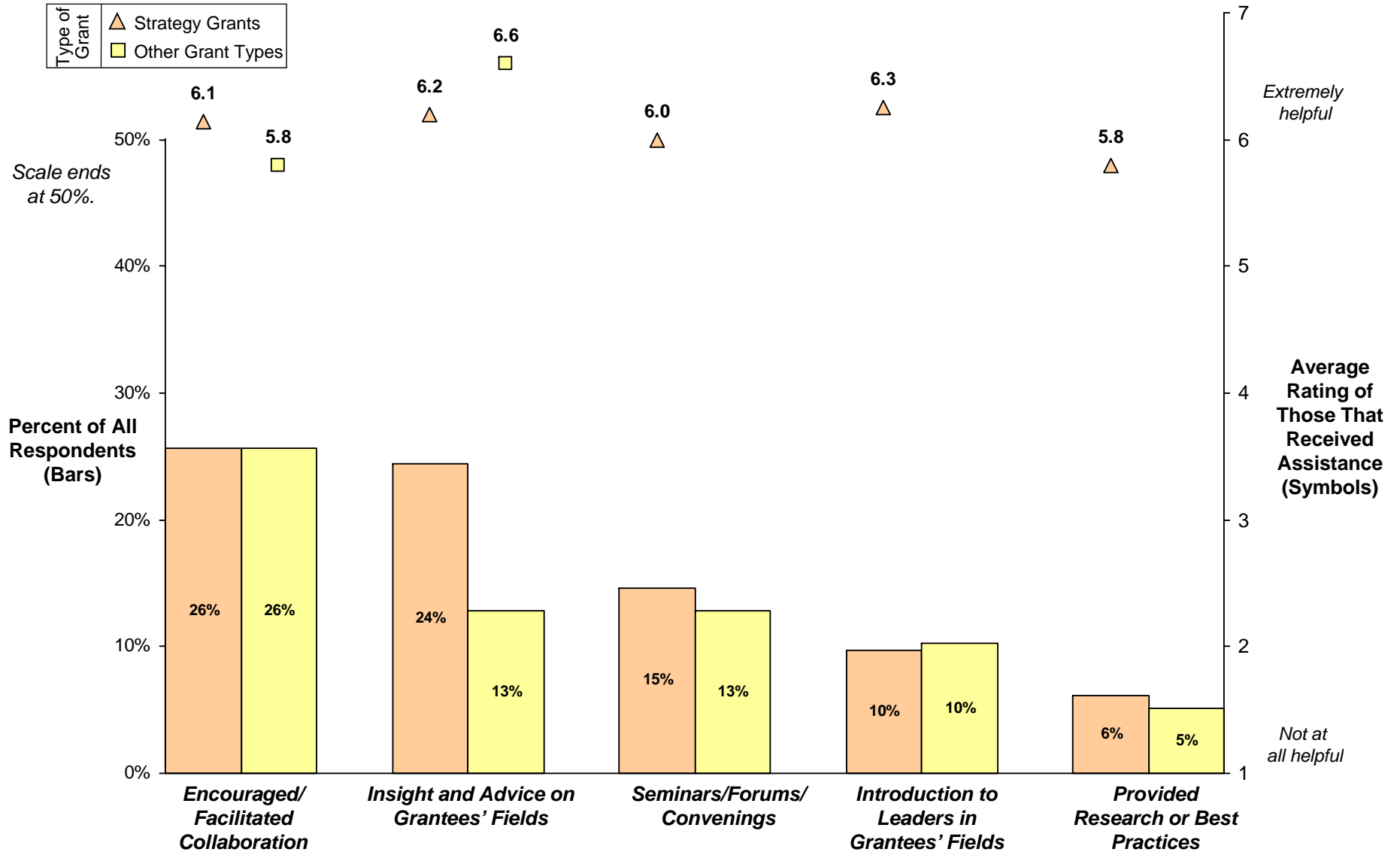
A similar proportion of RIF grantees are provided field-related assistance compared to the typical foundation.

Frequency and Helpfulness of Field-Related Assistance Activities



Field-Related Assistance Activities & Helpfulness (2)

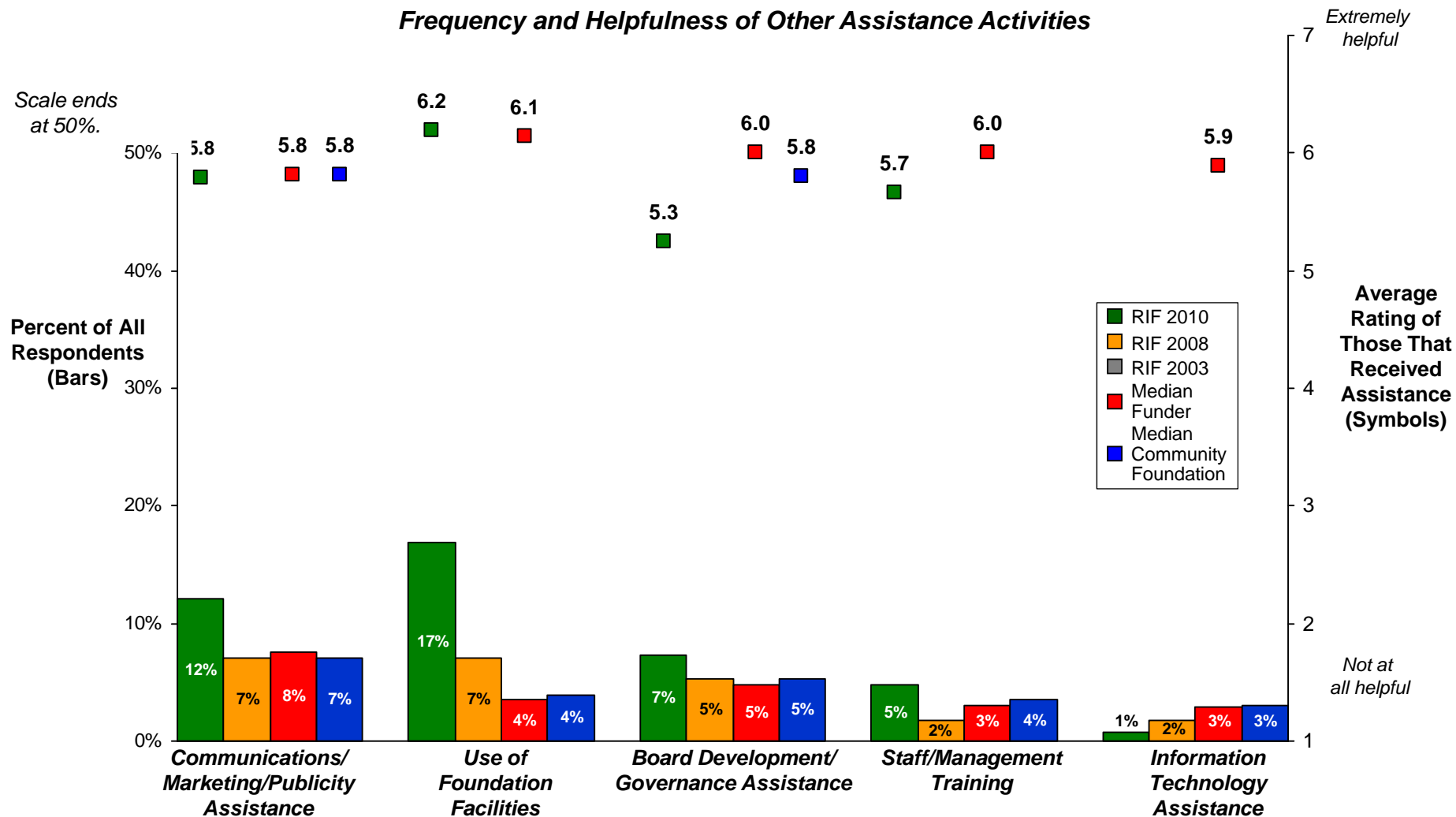
Frequency and Helpfulness of Field-Related Assistance Activities



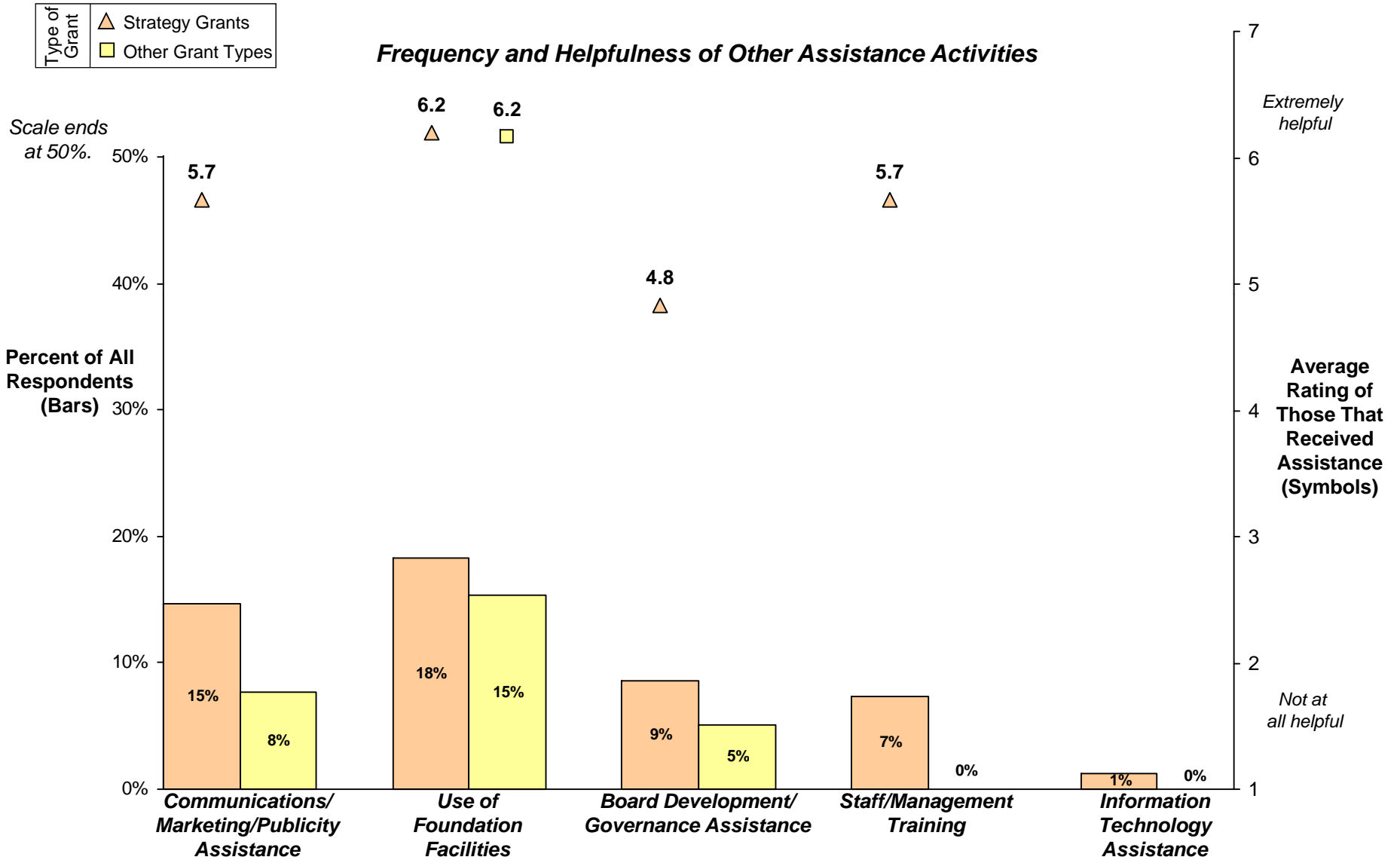
Other Support Activities & Helpfulness (1)

RIF provides a larger than typical proportion of grantees with communications/marketing/publicity assistance and use of Foundation facilities than is typical.

Frequency and Helpfulness of Other Assistance Activities



Other Support Activities & Helpfulness (2)



Impact of Assistance Securing Funding from Other Sources

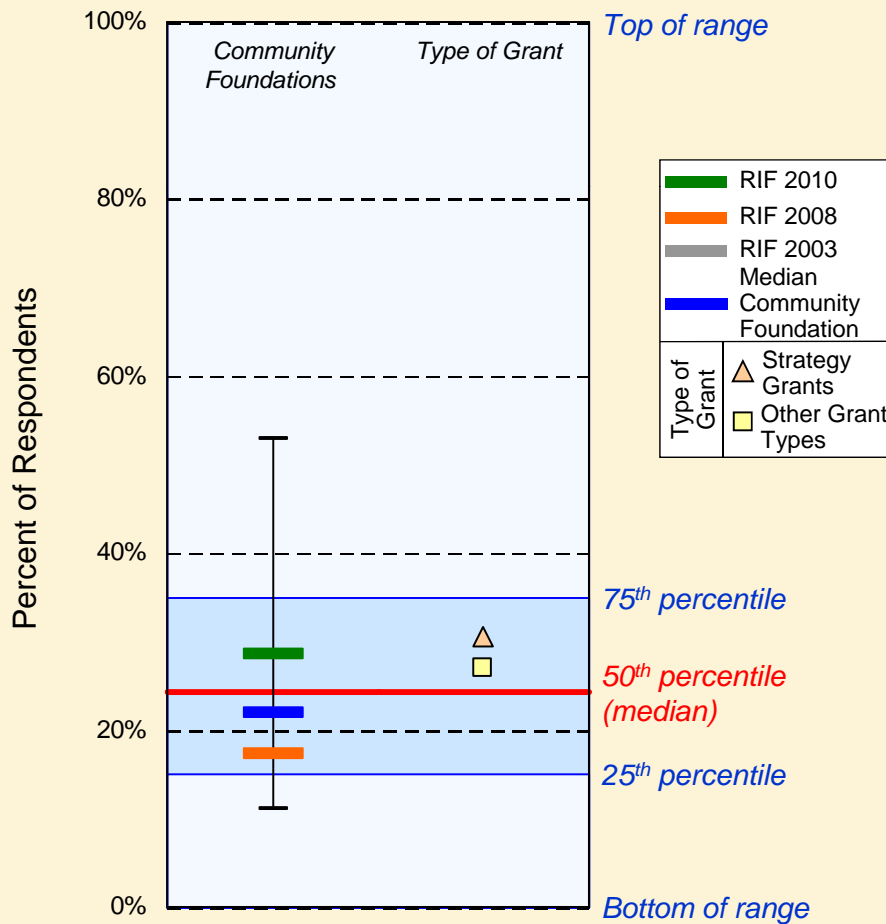
The proportion of RIF grantees receiving active assistance from the Foundation in securing funding from other sources is:

- larger than that of the median funder
- larger than that of the median community foundation

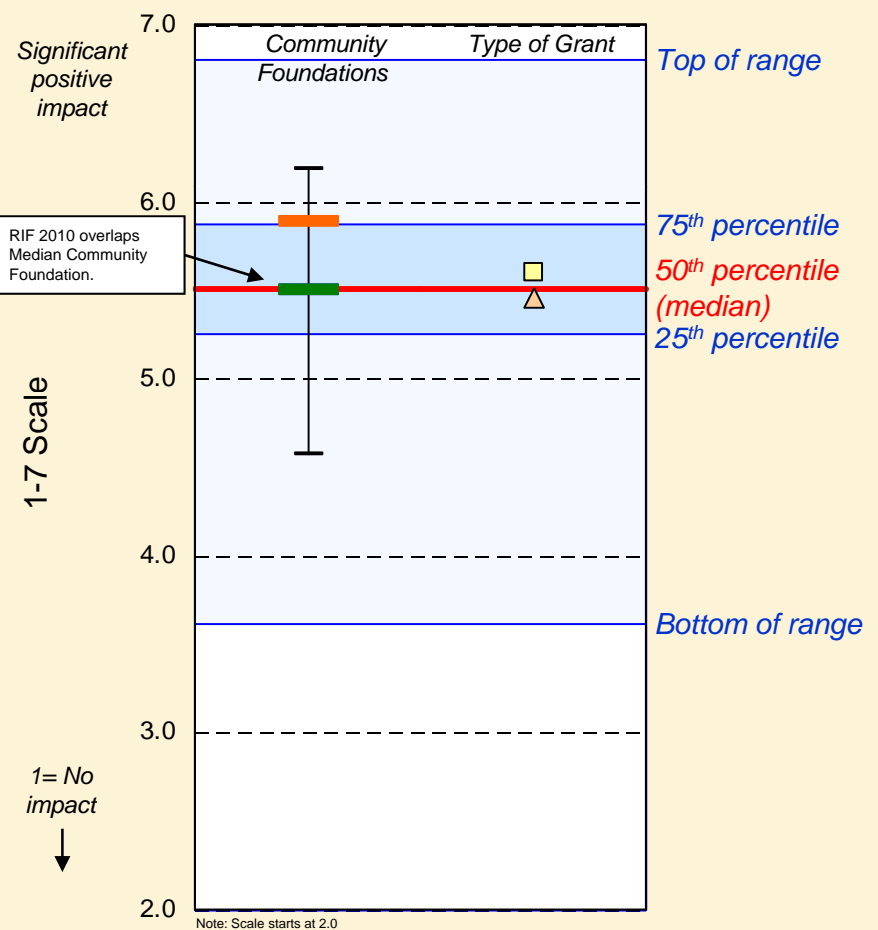
On impact of the Foundation's assistance in securing funding from other sources, RIF is rated:

- similarly to the median funder
- similarly to the median community foundation

Percent of Grantees That Received Assistance Securing Funding from Other Sources



Impact of Assistance Securing Funding from Other Sources

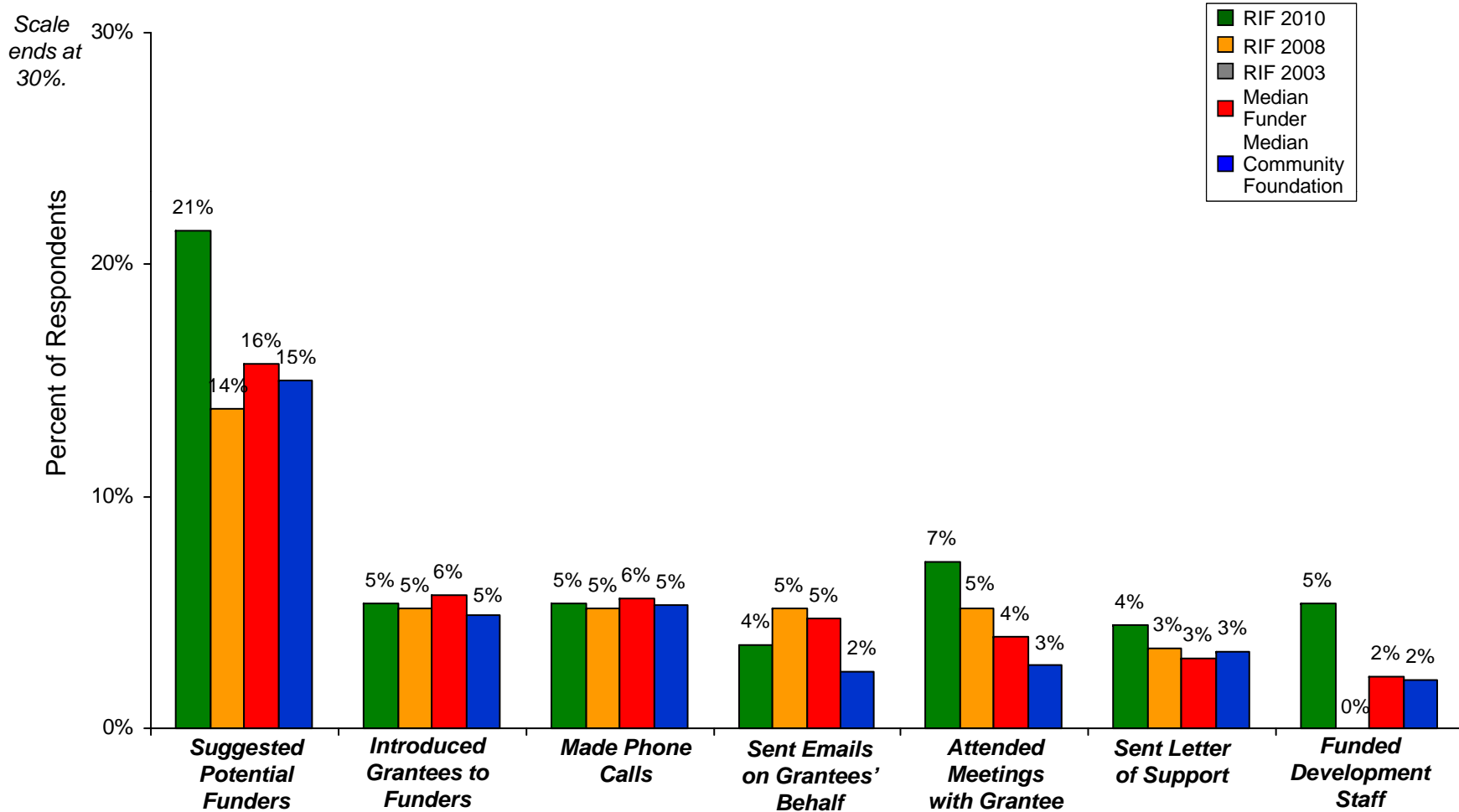


Note: RIF 2003 data on both charts not available due to changes to the survey instrument.

Frequency of Assistance Securing Funding from Other Sources (1)

RIF grantees report receiving a typical amount of assistance securing funding from other sources from the Foundation.

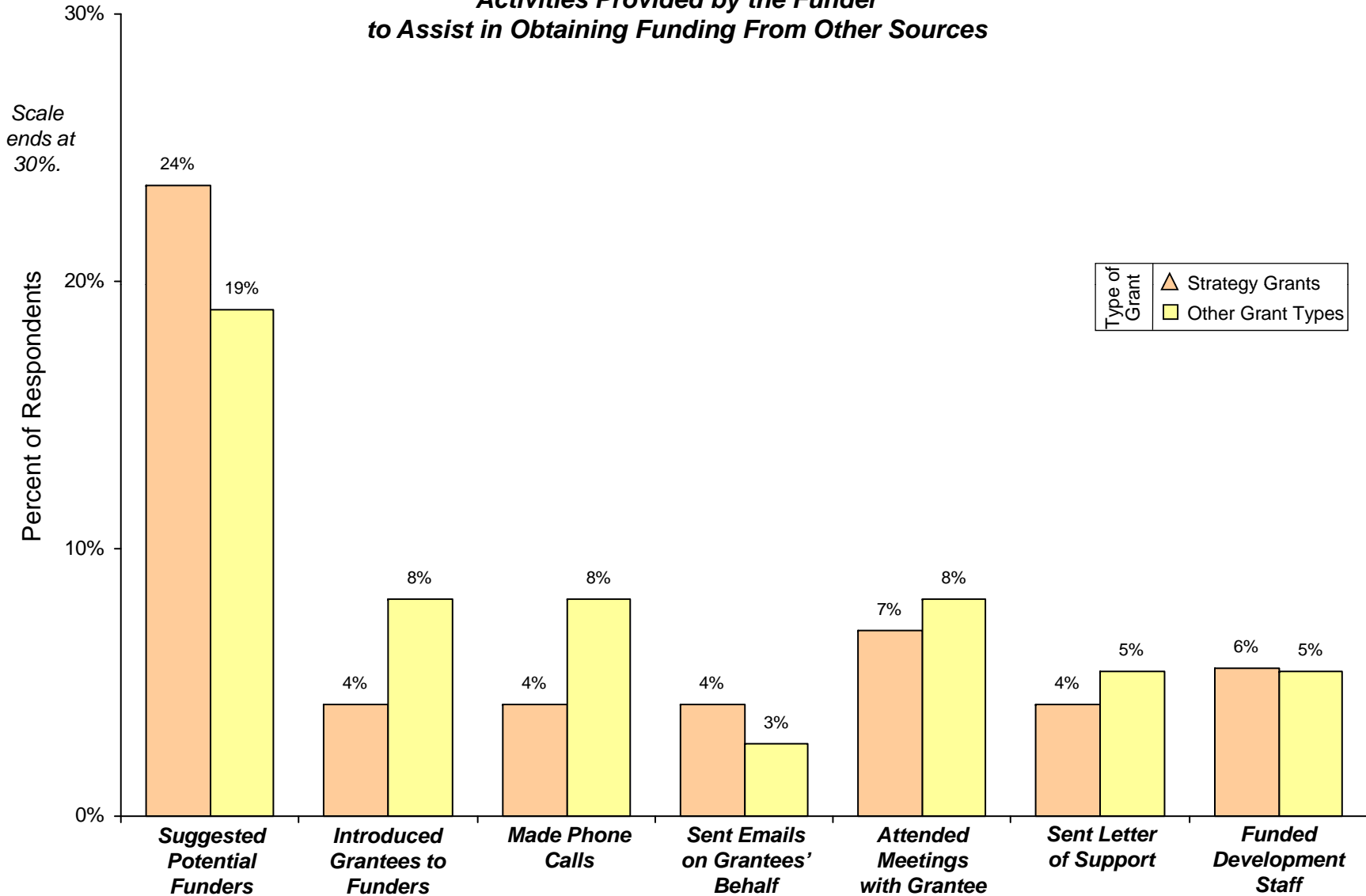
Activities Provided by the Funder to Assist in Obtaining Funding From Other Sources



Note: RIF 2003 data not available due to changes in the survey instrument.

Frequency of Assistance Securing Funding from Other Sources (2)

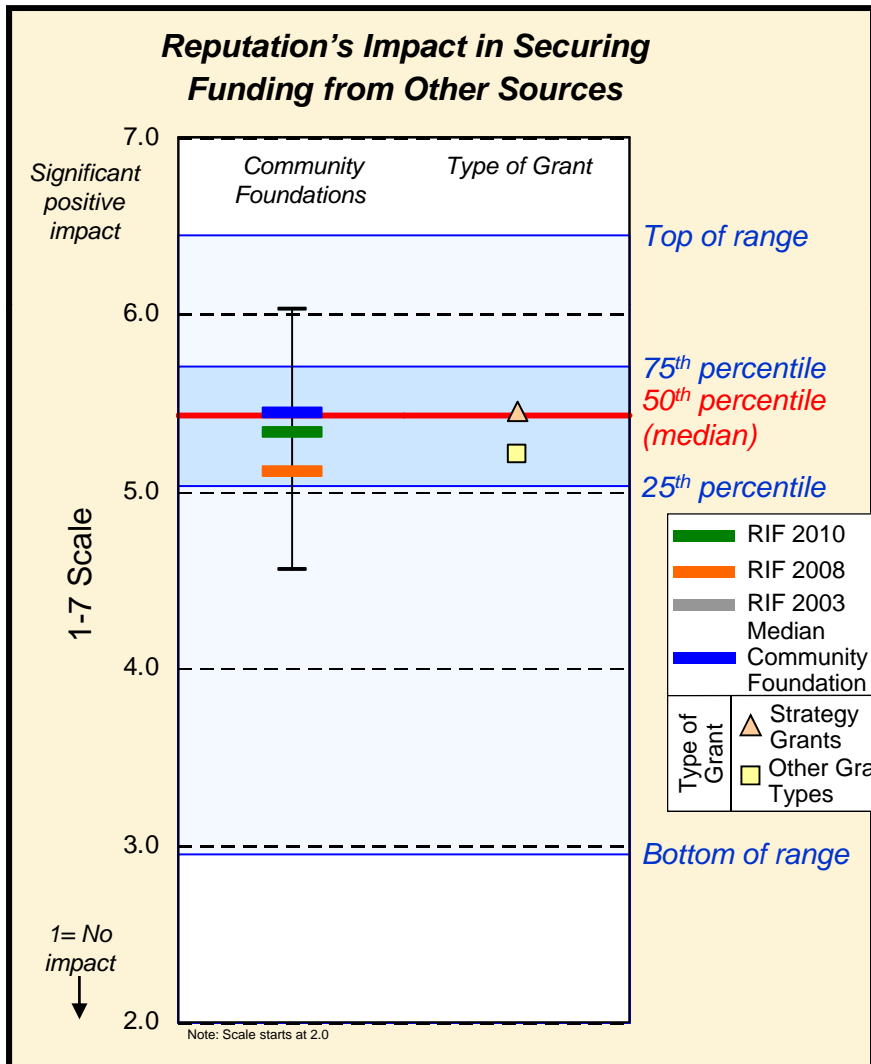
Activities Provided by the Funder to Assist in Obtaining Funding From Other Sources



Impact of Reputation

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

- similarly to the median funder
- similarly to the median community foundation



Selected Grantee Comments

- ♦ “The Foundation’s impact on this organization is significant because funding has allowed us to carry out our programs and find matching support.”
- ♦ “The Foundation’s support has enabled us to bridge from a very small grant-funded organization to one largely supported by earned income. The Foundation has done this not only by funding our operations, but by giving us the credibility of an organization supported by the Foundation.”
- ♦ “The RI Foundation’s financial support is obviously very important, but a grant from the Foundation is like a seal of approval that we are a legitimate group and doing important work here in RI.”

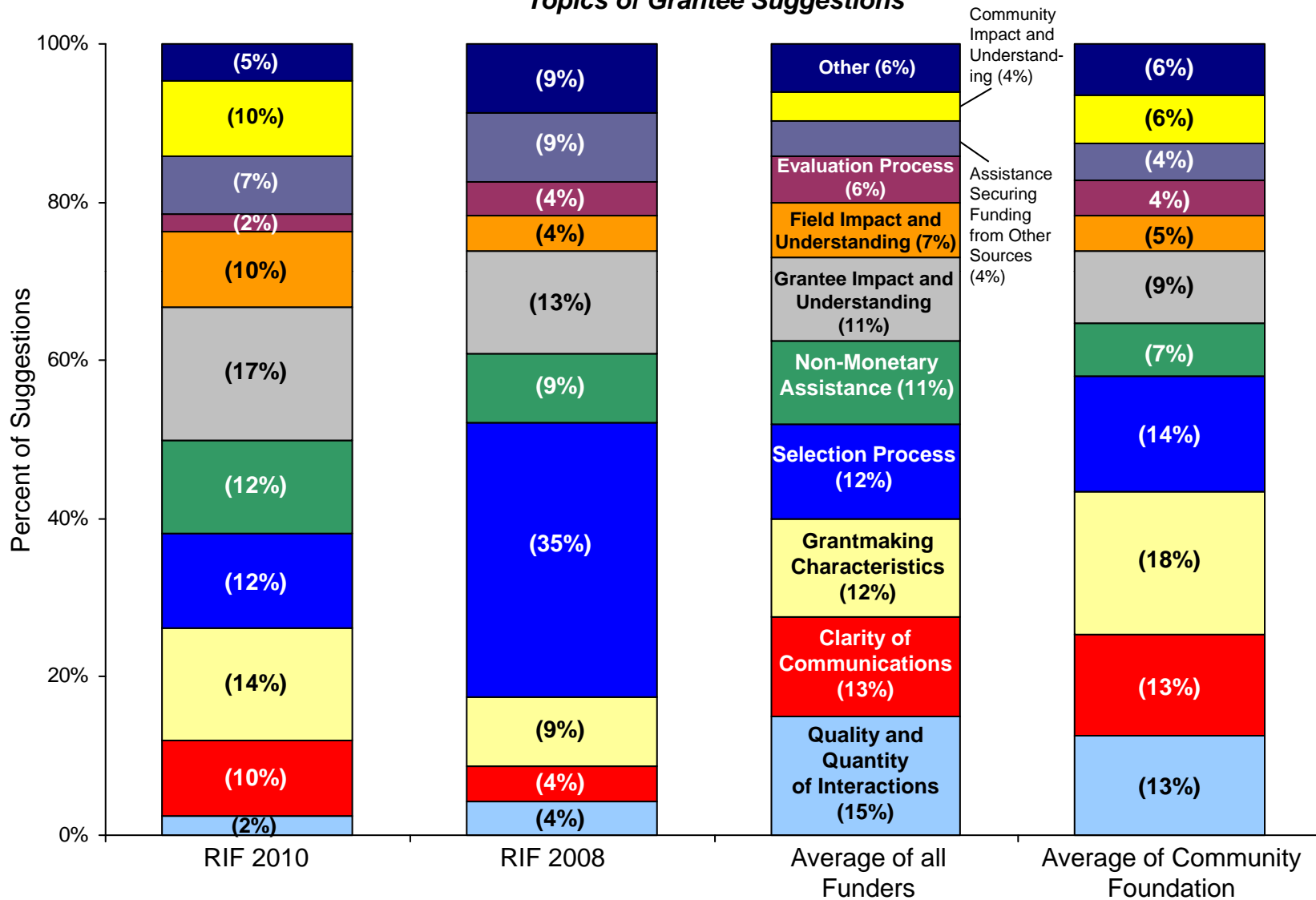
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Grantee Suggestions for the Foundation (1)

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

Topics of Grantee Suggestions



Grantee Suggestions for the Foundation (2)

% Grantee Suggestions		RIF Grantee Suggestions
Topic of Grantee Suggestion	RIF	Sub-Themes and Sample of Comments
Grantee Impact and Understanding	17%	<p>“In my three years in Providence, the Foundation has had three very different changes in their structure and approach which can make things difficult for grantees. Predictable year-to-year consistency around funding processes and priorities make it easier for us to plan.”</p> <p>“More support for new organizations so that they are more likely to succeed and become self-sustaining.”</p> <p>“I would love to see the Foundation make a concerted effort to get to know the Expansion Arts organizations and to bring them into the wider fold, while giving the specific support needed to the organizations.”</p> <p>“If they better understood what we do.”</p>
Grantmaking Characteristics	14%	<p>“We would prefer longer term funding...i.e., beyond one year to fully implement and expand our work.”</p> <p>“I wonder if an organization could have multiple grants at the same time that overlap in time.”</p> <p>“Provide core operating support for coalitions and collaborative work as long as the coalitions/collaborations are being effective and successfully maintaining outcomes. It is wasteful to invest in the creation/formation of a coalition/collaboration and then not take advantage of its benefits for the long term once the start-up costs (financial, relationships, organizational) are paid. Maintaining operations costs less than start-up and the synergistic outcomes of a collaboration are established. Yet it is very difficult to raise/maintain funding for a collaboration/coalition beyond the start-up. If you look at the history of collaborations and coalitions that have been started and then disappeared because the initial funding ended, you would find a long history of lost organizations and their benefits across Rhode Island and nationally.”</p>
Selection Process	12%	<p>“Shorten the length of time between the application deadline, the decision, and delivery of funds.”</p> <p>“They need to change criteria for receiving multiple Professional Development Grant awards in one fiscal year. I believe if [our] staff received an award in a given fiscal year than no other awards can be given to your agency.”</p> <p>“We would appreciate a more direct appraisal of the fundability of a project during initial conversations, even prior to the letter of intent stage. The conceptualization and completion of a competitive application to RIF is labor intensive process.”</p>
Non-monetary Assistance	12%	<p>“Promoting and facilitating partnerships to strengthen grant projects and outcomes.”</p> <p>“Maybe the development of affinity groups among grantees who are leaders in their work to help facilitate more peer learning...perhaps something less formal than the INE mentor/mentee or fellows program, but an opportunity to float/incubate new ideas or share recent developments and grow partnerships.”</p> <p>“I’d like to see someone dedicated to helping the EA organizations implement the training they are receiving with some real mentorship.”</p>

Grantee Suggestions for the Foundation (2)

% Grantee Suggestions		RIF Grantee Suggestions
Topic of Grantee Suggestion	RIF	Sub-Themes and Sample of Comments
Clarity of Communication	10%	<p>“More consistency on the part of staff with communications regarding funding and direction.”</p> <p>“Would like a public forum on changes in the Foundations funding priorities this year.”</p>
Field Impact and Understanding	10%	<p>“Foundation could play the role of convener and field builder when it comes to future school/expanded learning.”</p> <p>“Have more thorough understanding of youth development field.”</p>
Community Impact and Understanding	10%	<p>“I would suggest that the Foundation initiate a program to invest a portion of its portfolio in local projects that match the Foundation’s mission in the state.”</p> <p>“The only improvement I can imagine is a more robust presence in South County, Rhode Island. I know that RIF has a limited staff – but it would behoove the organization to be better known – more ‘hands-on’ in South County.”</p>
Assistance Securing Funding from Other Sources	7%	<p>“The Foundation has been a great funder. I would like them to play a role in helping us access outside funding opportunities through the relationships the staff has with other foundations.”</p> <p>“Much more assistance in identifying other funding sources rather than touting RIF’s own successes and resources.”</p>
Quality and Quantity of Interactions	2%	<p>“Quarterly meetings with grantees to review progress and challenges will keep everyone on track.”</p>
Evaluation	2%	<p>“I’d like to suggest that the Foundation have conversations to evaluate the projects and programs with the EA recipients, and do some planning to help find other support.”</p>
Other	5%	<p>“RIF should better invest in sustainable organizations rather than foster mergers of unsustainable organizations unless it plans to sustain them for the years it will realistically take to make them sustainable. Mergers should be encouraged between the well-established and the lesser, merging the weak with the weak or encouraging their collaboration does not beget their strength, though it does eliminate some overhead. Absorption and leveraging of capital is not the same as absorption of institutional personality and leveraging less for more also does not necessarily happen in the non profit world.”</p>

Note: There were a total of 42 grantee suggestions for RIF. A sample of the suggestions are shown here. The full set of suggestions, redacted to protect grantee anonymity, will be provided with the GPR.

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Review of Findings (1)

Chart shows the percentile rank of RIF 2010' (◆), RIF 2008 (◇), RIF 2003 (◇), and the median community foundation (◆) 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						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						Grantees were asked to rate the impact of the funder's assistance securing funding from other sources.

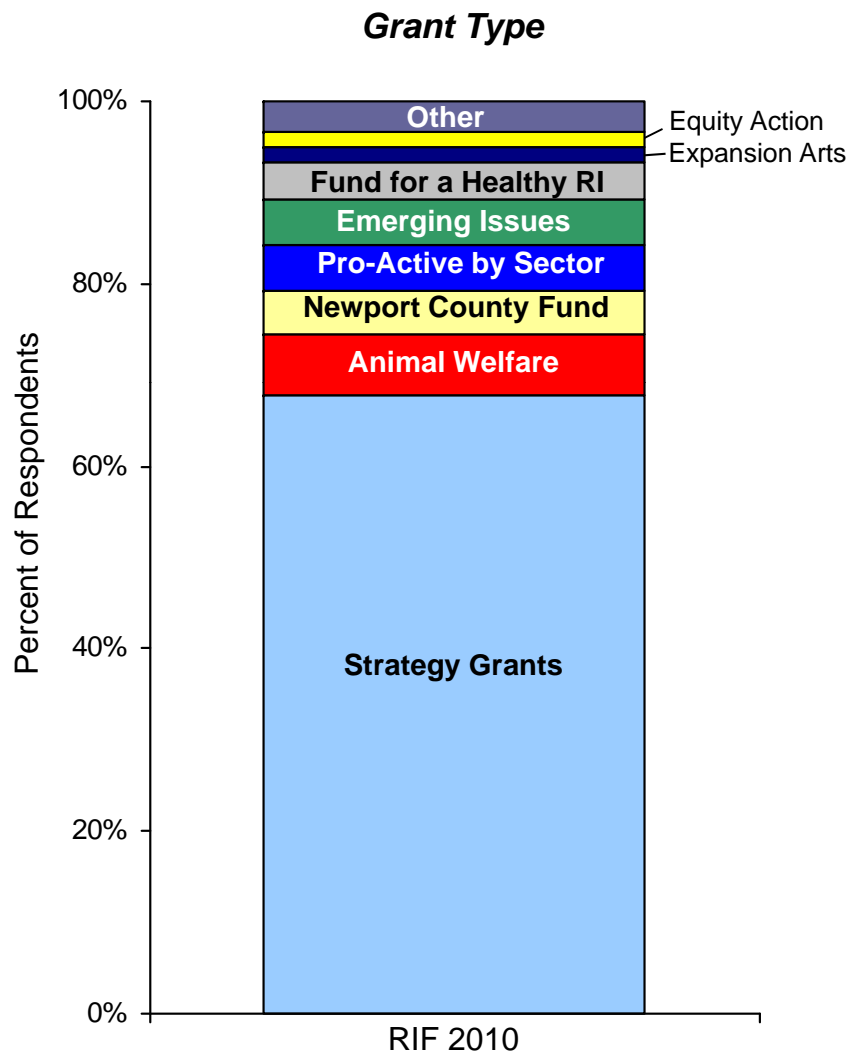
Review of Findings (2)

Chart shows the percentile rank of Strategy Grants (△) and Other Grant Types (□) grantees 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						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						Grantees were asked to rate the impact of the funder's assistance securing funding from other sources.

Additional Analysis – Grant Type

Grantees were asked to indicate which type of grant they received from RIF. The majority of grantees indicated receiving a strategy grant.



RIF Analysis – Variation by Grant Type

RIF grantees rate the Foundation differently based on strategy grants vs. other grant types.

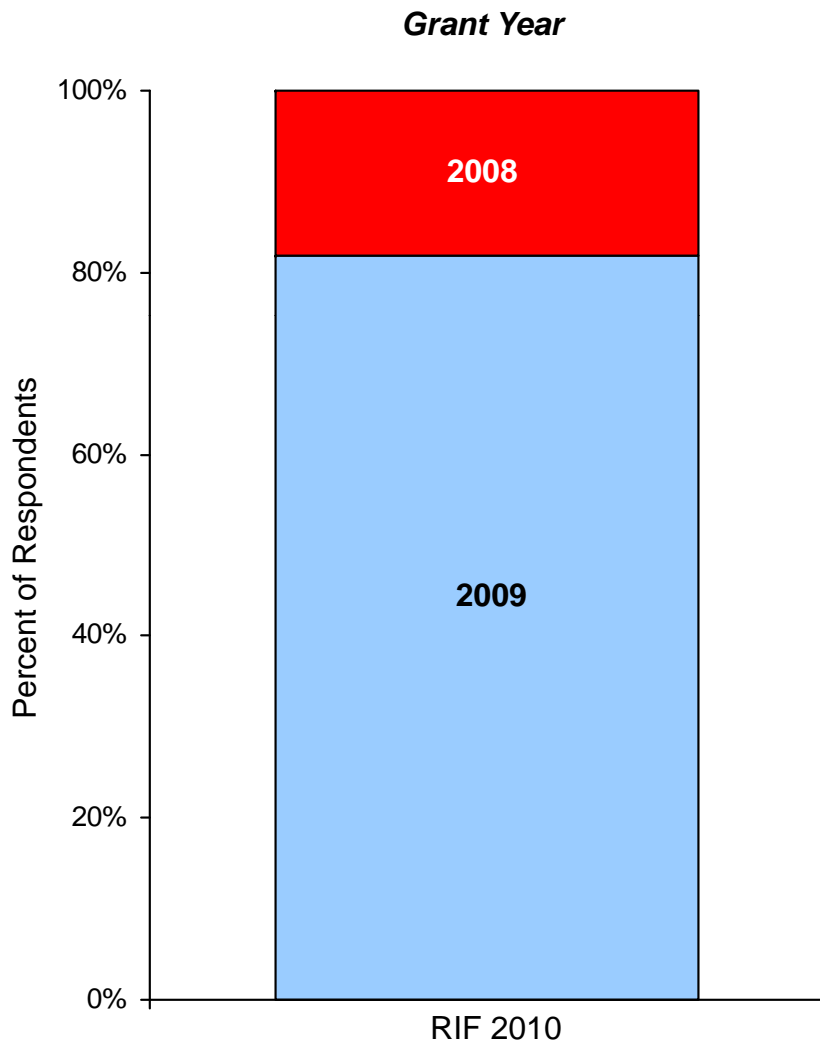
Strategy Grants rate the Foundation significantly¹ higher on:

- ◆ Its ability to advance knowledge in grantees' fields
- ◆ Its ability to effect on public policy
- ◆ Its understanding of grantees' goals and strategy
- ◆ The effect of its funding on grantees' ability to sustain the work funded by the grant in the future
- ◆ The consistency of its communication resources

Note: Statistical testing could not be done on other individual grant types due to small sample size.

Additional Analysis – Grant Year

When asked to indicate in which year the grantee organization received its grant, the majority of grantees indicated receiving their grant in 2009.



RIF Analysis – Variation by Grant Year

RIF grantees rate the Foundation differently based on their grant year.

2009 Grantees rate significantly¹ higher than 2008 grantees on:

- ◆ Impact on and understanding of RIF’s funding on their community
- ◆ Understanding of RIF’s funding on grantees’ fields
- ◆ Impact on grantees’ organizations
- ◆ Understanding of grantees goals and strategy,
- ◆ Overall satisfaction
- ◆ Quality of their interactions with RIF,
- ◆ The clarity of the Foundation’s communication of its goals and strategy
- ◆ The consistency of the Foundation’s communication resources
- ◆ The helpfulness of the evaluation process in strengthening grantee organizations
- ◆ The helpfulness of the assistance they received during the course of developing their most recent grant proposal

¹: Significance tested at 90% confidence interval.

Note: Comparative data not available because this question was only asked of RIF grantees.

Analysis and Discussion (1)

Strong Ratings Overall and Dramatic Improvements Since 2008 Survey

- ♦ The Rhode Island Foundation receives very positive ratings and comments from its grantees throughout its 2010 Grantee Perception Report.
 - Specifically, it is rated above the median funder and above the median community foundation by grantees on the Foundation's impact on grantees' organizations, its understanding of grantees' goals and strategy, overall grantee satisfaction, the quality of its interactions with grantees, the clarity of communication of its goals and strategy, the consistency of its communication resources, the helpfulness of the selection process in strengthening grantees' organizations and programs, and the helpfulness of the reporting/evaluation process in strengthening grantees' organizations and programs.
- ♦ These high grantees ratings are also represent statistically significant¹ improvements from grantees surveyed in 2008 on many of these measures.
 - Other measures that were rated significantly higher by 2010 grantees than 2008 grantees include the Foundation's impact on and understanding of grantees' fields, its ability to advance knowledge and affect public policy in grantees' fields, its understanding of grantees' local communities, and the effect of the its funding on grantees' ability to sustain the work funded by the grant in the future.

Particular Improvements the Selection Process

- ♦ RIF 2010 grantees emphasize improvements the Foundation has made to the selection process in both their ratings and comments. In addition to improved ratings on the helpfulness of the selection process to grantees, grantees also report that staff is more involved in the development of grant proposals than the typical funder. Both of these ratings are substantial improvements from grantee ratings in 2008.
 - 12 percent of grantees' suggestions for improvement were aimed at the selection process in 2010, compared to 35 of suggestions in 2008.
 - One grantee comments, "It has all been very clear and straightforward, yet I feel the process has also been responsive to understanding my organization's needs and struggles."
- ♦ 2010 grantees reported a dramatic decrease in the time elapsed between submission of their proposal and clear commitment of funding compared to 2008 grantees. However, grantees also report feeling a higher level of pressure to modify their priorities to create a proposal that is likely to receive funding than grantees at the typical funder.
 - » *How will the Foundation maintain its high ratings going forward – has it distilled and documented the practice and values that staff and board believe have led to these improved ratings?*
 - » *How will RIF balance the tension between the positive changes made to the selection process with increased pressure grantees report feeling to modify their priorities to receive Foundation funding?*

Analysis and Discussion (2)

Sustainability of Grantee Organizations

- ◆ While RIF's ratings of the effect of its funding on grantees' ability to sustain their work in the future improved since the 2008 survey, ratings still fall below the median funder (although similar to the ratings of the median community foundation).
 - A greater proportion of grantees report that their grant was used to add new program work – 34 percent at RIF compared to 27 percent at the average foundation. RIF grantees who indicate that their grant was used to add new program work rate significantly lower than grantees who indicate their grant was used to enhance their capacity.
 - RIF grantees are less likely to be first-time grantees than typical, but more likely to have received inconsistent funding in the past.
- ◆ RIF also continues to give smaller and shorter grants than typical, although they are larger and longer than grants of the median community foundation. Similarly the number of dollars awarded to grantees per hour spent on the Foundation's administrative requirements, while typical for community foundations, is below 75 percent of the funders in CEP's dataset.
- ◆ Based on CEP's report *More than Money*, grantees receiving more concentrated patterns of nonmonetary assistance (either a comprehensive or field-focused set of assistance activities) have a substantially more positive and productive experience with their foundation funders than grantees receiving no assistance.
 - The proportion of RIF grantees that report receiving comprehensive or field-focused assistance is smaller than that of the typical funder, but RIF grantees receiving these patterns of assistance rate the Foundation significantly higher across measures of the report, including overall satisfaction, quality of interactions, and impact on grantees' fields and communities.
 - Additionally, RIF provides many grantees with small amounts of non-monetary assistance, a pattern of assistance that CEP research shows does not generally make a significant difference for grantees.
 - » *What are the Foundation's goals for sustaining grantees' work in the future? How does RIF's grantmaking strategy support these goals?*
 - » *Are there key grantees the Foundation might identify for receipt of more focused non-monetary assistance?*

Analysis and Discussion (3)

Differences by Grant Type and Year

- ♦ Grantees' perceptions of and experiences with the Foundation show significant variation depending on the type of grant they received as well as the year in which they received their grant.
 - Across most measures of the survey, strategy grantees rate the Foundation substantially higher than grantees in most other grant programs. The exception to this pattern is proactive by sector grantees, who rate higher than all other grantees on most measures of the survey, including strategy grantees.
 - While only 22 grantees receiving grants from the Foundation in 2008 responded to the survey, these grantees rate the Foundation lower than grantees receiving their grant in 2009, often statistically significantly so. Just over half of grantees funded in 2008 are currently funded by the Foundation, yet they do not rate as high on average as grantees funded in 2009 on most measures.
 - » *Does the Foundation have different strategies for engaging grantees from different programs? Is the Foundation concerned with the lower ratings of its specific grant initiatives other than the proactive by sector grants?*
 - » *What changes made 2009 a pivotal point for grantees in their experience being funded by RIF? Why might 2008 currently funded grantees be experiencing these changes to a lesser degree than those funded in 2009?*

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Current Economic Climate (1)

The following section reflects the results of three questions related to the current economic environment. These questions are meant to address grantee and funder responses to the current economic climate.

- ♦ 58 percent of RIF's grantees have considered or made changes in response to the current economic climate, these grantees most frequently mention adding partners to assist in meeting the work's goals.

Measure	RIF 2010	Full Dataset Median
Changes to Work Funded by this Specific Grant in Response to the Current Economic Climate		
Shift in timeline of the work	25%	20%
Narrowing of scope of the work	9%	14%
Broadening of scope of the work	13%	14%
Adding partners to assist in meeting the work's goals	33%	30%
Modification of the specific results to be achieved by the work	17%	16%
We have not made or considered making any changes	42%	46%
Who Initially Suggested the Consideration of these Changes		
We considered these changes as a result of internal discussion	97%	91%
We considered these changes as a result of the Foundation's recommendation	1%	7%
We considered these changes as a result of another funder's recommendation	1%	1%
Helpfulness of the Foundation in the consideration of these changes (1="Not at all helpful" and 7="Extremely helpful")	5.0	5.1
Foundation was not involved in our consideration of these changes	50%	44%
Communication and Helpfulness of Foundation Strategy in Response to the Current Economic Climate		
Clarity of the Foundation's communication of its response to the current economic climate (1="Not at all clearly" and 7="Extremely clearly")	5.0	4.8
Foundation has not communicated its response to the current economic climate	16%	29%
Helpfulness of the Foundation in responding to the current economic climate (1="Not at all" and 7="To a great extent")	3.6	3.8

Note: This table includes data from 37 funders. RIF 2003, RIF 2008, and median community foundation data not available due to changes to the survey instrument.

Current Economic Climate (2)

Measure	Strategy Grants	Other Grant Types
Changes to Work Funded by this Specific Grant in Response to the Current Economic Climate		
Shift in timeline of the work	31%	13%
Narrowing of scope of the work	10%	8%
Broadening of scope of the work	14%	11%
Adding partners to assist in meeting the work's goals	35%	29%
Modification of the specific results to be achieved by the work	19%	16%
We have not made or considered making any changes	39%	50%
Who Initially Suggested the Consideration of these Changes		
We considered these changes as a result of internal discussion	98%	94%
We considered these changes as a result of the Foundation's recommendation	2%	0%
We considered these changes as a result of another funder's recommendation	0%	6%
Helpfulness of the Foundation in the consideration of these changes (1="Not at all helpful" and 7="Extremely helpful")	5.2	4.8
Foundation was not involved in our consideration of these changes	46%	67%
Communication and Helpfulness of Foundation Strategy in Response to the Current Economic Climate		
Clarity of the Foundation's communication of its response to the current economic climate (1="Not at all clearly" and 7="Extremely clearly")	5.0	5.3
Foundation has not communicated its response to the current economic climate	17%	17%
Helpfulness of the Foundation in responding to the current economic climate (1="Not at all" and 7="To a great extent")	3.5	3.9

Racial Diversity (1)

Measure	RIF 2010				Full Dataset Median			
Foundation Communication Related to Racial Diversity								
<i>Has the Foundation communicated with you about racial diversity related to:</i>	Yes	No, but not relevant	No, but Foundation should	Don't Know	Yes	No, but not relevant	No, but Foundation should	Don't Know
The Foundation itself (staff, board, etc.)	27%	36%	23%	14%	13%	43%	16%	28%
The Foundation's programmatic work (funding, mission, programs)	47%	22%	20%	11%	34%	26%	17%	23%
The grantee's organization (staff, board, etc.)	35%	32%	15%	18%	22%	39%	14%	25%
The work associated with this grant in particular	39%	29%	13%	18%	29%	35%	12%	24%
Impact of Communication Related to Racial Diversity (only asked of grantees who indicated 'yes' to the relevant question above)								
Impact of communication on grantee's organization (1="Negative impact", 4="Neither positive nor negative impact", and 7="Positive impact")	4.9				5.0			
Impact of communication on grantee's work (1="Negative impact", 4="Neither positive nor negative impact", and 7="Positive impact")	5.1				5.2			
Relevance of Racial Diversity to Funded Work								
Percent of grantees who indicate that the work funded by this grant addresses topics in which racial diversity is a relevant component	56%				56%			

Note: This table includes data from 15 funders. RIF 2008, RIF 2003, and median community foundation data not available due to changes to the survey instrument.

Racial Diversity (2)

Measure	Strategy Grants				Other Grant Types			
Foundation Communication Related to Racial Diversity								
<i>Has the Foundation communicated with you about racial diversity related to:</i>	Yes	No, but not relevant	No, but Foundation should	Don't Know	Yes	No, but not relevant	No, but Foundation should	Don't Know
The Foundation itself (staff, board, etc.)	30%	41%	22%	7%	19%	28%	22%	31%
The Foundation's programmatic work (funding, mission, programs)	49%	25%	19%	6%	40%	17%	23%	20%
The grantee's organization (staff, board, etc.)	42%	31%	14%	13%	20%	34%	17%	29%
The work associated with this grant in particular	42%	32%	13%	13%	34%	26%	11%	29%
Impact of Communication Related to Racial Diversity (only asked of grantees who indicated 'yes' to the relevant question above)								
Impact of communication on grantee's organization (1="Negative impact", 4="Neither positive nor negative impact", and 7="Positive impact")	4.7				5.7			
Impact of communication on grantee's work (1="Negative impact", 4="Neither positive nor negative impact", and 7="Positive impact")	4.7				5.7			
Relevance of Racial Diversity to Funded Work								
Percent of grantees who indicate that the work funded by this grant addresses topics in which racial diversity is a relevant component	56%				54%			

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Grantmaking Characteristics (1)

Measure	RIF 2010	RIF 2008	RIF 2003	Full Dataset Median	Community Foundation Median
Length of Grant Awarded					
<i>Average grant length</i>	1.5 years	1.3 years	1.3 years	2.1 years	1.5 years
1 year	73%	81%	79%	51%	67%
2 years	14%	10%	13%	20%	15%
3 years	11%	5%	7%	17%	10%
4 years	1%	3%	0%	4%	2%
5 or more years	2%	0%	1%	8%	5%
Type of Grant Awarded					
Program/Project Support	73%	75%	N/A	65%	71%
General Operating Support	6%	5%	N/A	19%	10%
Technical Assistance	17%	15%	N/A	5%	6%
Building/Renovation	2%	5%	N/A	7%	8%
Other Capital Support	0%	0%	N/A	2%	2%
Scholarship/Fellowship	1%	0%	N/A	1%	1%
Endowment Support	0%	0%	N/A	1%	1%
Event/Sponsorship Funding ¹	1%	N/A	N/A	N/A	N/A
Grant Amount Awarded					
<i>Median grant size</i>	\$40K	\$40K	\$45K	\$60K	\$35K
Less than \$10K	4%	3%	3%	11%	18%
\$10K - \$24K	15%	16%	13%	15%	23%
\$25K - \$49K	36%	45%	36%	15%	16%
\$50K - \$99K	26%	22%	33%	17%	18%
\$100K - \$149K	5%	9%	7%	10%	7%
\$150K - \$299K	9%	3%	3%	13%	9%
\$300K - \$499K	1%	2%	3%	7%	3%
\$500K - \$999K	3%	0%	1%	6%	3%
\$1MM and above	0%	0%	0%	7%	4%
Median Percent of Budget Funded By Grant (Annualized)					
Size of grant relative to size of grantee budget	4.4%	3.1%	4.2%	3.3%	2.9%

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

Note: RIF 2003 data on "Type of Grant Awarded" not available due to changes to the survey instrument.

1: Comparative and trend data not available for event/sponsorship funding because this option was added to the survey in the fall of 2009. For the 30 funders for which data is available, the average percentage of grantees indicating they received event/sponsorship funding was 2 percent.

Grantmaking Characteristics (2)

Measure	Strategy Grants	Other Grant Types
Length of Grant Awarded		
<i>Average grant length</i>	1.5 years	1.5 years
1 year	72%	76%
2 years	17%	5%
3 years	9%	16%
4 years	0%	3%
5 or more years	3%	0%
Type of Grant Awarded		
Program/Project Support	80%	62%
General Operating Support	6%	5%
Technical Assistance	12%	23%
Building/Renovation	1%	5%
Other Capital Support	0%	0%
Scholarship/Fellowship	0%	3%
Endowment Support	0%	0%
Event/Sponsorship Funding	0%	3%
Grant Amount Awarded		
<i>Median grant size</i>	\$40K	\$25K
Less than \$10K	1%	11%
\$10K - \$24K	9%	31%
\$25K - \$49K	45%	17%
\$50K - \$99K	28%	22%
\$100K - \$149K	6%	3%
\$150K - \$299K	10%	8%
\$300K - \$499K	1%	0%
\$500K - \$999K	0%	8%
\$1MM and above	0%	0%
Median Percent of Budget Funded By Grant (Annualized)		
Size of grant relative to size of grantee budget	5.0%	3.6%

Grantee Characteristics (1)

Measure	RIF 2010	RIF 2008	RIF 2003	Full Dataset Median	Community Foundation Median
Operating Budget of Grantee Organization					
<i>Median budget</i>	<i>\$0.8MM</i>	<i>\$1.0MM</i>	<i>\$0.8MM</i>	<i>\$1.4MM</i>	<i>\$0.8MM</i>
< \$100K	12%	9%	4%	8%	12%
\$100K - \$499K	26%	25%	29%	20%	23%
\$500K - \$999K	16%	12%	18%	14%	16%
\$1MM - \$4.9MM	29%	30%	33%	30%	27%
\$5MM - \$24.9MM	12%	18%	6%	18%	15%
\$25MM and above	4%	7%	10%	11%	7%
Length of Establishment of Grantee Organizations					
<i>Median length of establishment</i>	<i>18 years</i>	<i>21 years</i>	<i>N/A</i>	<i>24 years</i>	<i>21 years</i>
Less than 5 years	9%	5%	N/A	7%	9%
5 - 9 years	13%	22%	N/A	14%	13%
10 -19 years	34%	22%	N/A	22%	23%
20 - 49 years	28%	33%	N/A	36%	36%
50 - 99 years	8%	7%	N/A	12%	11%
100 years or more	8%	12%	N/A	9%	8%

Grantee Characteristics (2)

Measure	Strategy Grants	Other Grant Types
Operating Budget of Grantee Organization		
<i>Median budget</i>	\$0.9MM	\$0.6MM
< \$100K	12%	15%
\$100K - \$499K	24%	29%
\$500K - \$999K	17%	15%
\$1MM - \$4.9MM	32%	21%
\$5MM - \$24.9MM	12%	15%
\$25MM and above	4%	6%
Length of Establishment of Grantee Organizations		
<i>Median length of establishment</i>	19 years	17 years
Less than 5 years	9%	11%
5 - 9 years	11%	16%
10 -19 years	36%	32%
20 - 49 years	30%	19%
50 - 99 years	6%	14%
100 years or more	8%	8%

Grantee Characteristics (3)

Measure	RIF 2010	RIF 2008	Full Dataset Median	Community Foundation Median
Length of Time Which Grantees Have Regularly Conducted the Funded Programs¹				
Less than 1 year	30%	47%	17%	23%
1 - 5 years	51%	44%	50%	49%
6 - 10 years	11%	7%	15%	12%
More than 10 years	8%	2%	18%	16%
Pattern of Grantees' Funding Relationship with the Foundation²				
First grant received from the Foundation	17%	N/A	34%	N/A
Consistent funding in the past	49%	N/A	48%	N/A
Inconsistent funding in the past	34%	N/A	18%	N/A
Length of Funding Relationship with the Foundation³				
1 - 5 years	51%	N/A	57%	N/A
6 - 10 years	26%	N/A	26%	N/A
More than 10 years	24%	N/A	17%	N/A
Funding Status and Grantees Previously Declined Funding				
Percent of grantees currently receiving funding from the Foundation	81%	88%	75%	67%
Percent of grantees previously declined funding by the Foundation	60%	74%	32%	51%

1: Represents data from 87 funders. RIF 2003 data not available due to changes in the survey.

2: Represents data from 16 funders. This question includes a "don't know" response option; 0 percent of RIF 2010 respondents answered "don't know," compared to 3 percent at the median funder. RIF 2008, RIF 2003, and Community Foundation data not available due to changes to the survey instrument.

3: Represents data from 16 funders. This question includes a "don't know" response option; 3 percent of RIF 2010 respondents answered "don't know," compared to 7 percent at the median funder. RIF 2008, RIF 2003, and Community Foundation data not available due to changes to the survey instrument.

Grantee Characteristics (4)

Measure	Strategy Grants	Other Grant Types
Length of Time Which Grantees Have Regularly Conducted the Funded Programs		
Less than 1 year	28%	33%
1 - 5 years	57%	38%
6 - 10 years	6%	25%
More than 10 years	9%	4%
Pattern of Grantees' Funding Relationship with the Foundation		
First grant received from the Foundation	15%	23%
Consistent funding in the past	52%	46%
Inconsistent funding in the past	33%	31%
Length of Funding Relationship with the Foundation		
1 - 5 years	50%	48%
6 - 10 years	26%	28%
More than 10 years	24%	24%
Funding Status and Grantees Previously Declined Funding		
Percent of grantees currently receiving funding from the Foundation	85%	72%
Percent of grantees previously declined funding by the Foundation	55%	68%

Grantee Characteristics (5)

Measure	RIF 2010	RIF 2008	Full Dataset Median	Community Foundation Median
Job Title of Respondents¹				
Executive Director	73%	N/A	49%	N/A
Development Director	8%	N/A	7%	N/A
Other Senior Management	4%	N/A	13%	N/A
Project Director	4%	N/A	14%	N/A
Other Development Staff	2%	N/A	5%	N/A
Volunteer	4%	N/A	3%	N/A
Other	6%	N/A	10%	N/A
Gender of Respondents²				
Female	60%	71%	62%	62%
Male	40%	29%	38%	38%
Race/Ethnicity of Respondents³				
Caucasian/White	86%	91%	80%	85%
African-American/Black	2%	4%	7%	8%
Hispanic/Latino	4%	0%	4%	2%
Asian (incl. Indian subcontinent)	5%	2%	3%	2%
Multi-racial	3%	0%	3%	1%
American Indian/Alaskan Native	0%	2%	1%	0%
Pacific Islander	0%	0%	0%	0%
Other	1%	2%	2%	2%

Note: RIF 2003 data not available due to changes in the survey instrument.

1: Contains data from 16 funders. RIF 2008 and Community Foundation Median data on "Job Title of Respondents" not available due to changes to the survey instrument.

2: In Spring of 2009 CEP removed the word "optional" from this question but added an "other" response choice and a "prefer not to say" response choice. Previously this question was only infrequently skipped and so we have maintained comparative data in spite of the question change. In response to this question, a total of 2 percent of RIF 2010 respondents selected "other" or "prefer not to say," compared to 2 percent at the median funder.

3: In Spring of 2009 CEP removed the word "optional" from this question but added a "prefer not to say" response choice. Previously this question was only infrequently skipped and so we have maintained comparative data in spite of the question change. In response to this question, a total of 5 percent of RIF 2010 respondents selected "prefer not to say," compared to 5 percent at the median funder.

Grantee Characteristics (6)

Measure	Strategy Grants	Other Grant Types
Job Title of Respondents		
Executive Director	73%	70%
Development Director	9%	5%
Other Senior Management	4%	5%
Project Director	4%	5%
Other Development Staff	1%	3%
Volunteer	4%	5%
Other	6%	5%
Gender of Respondents		
Female	59%	59%
Male	41%	41%
Race/Ethnicity of Respondents		
Caucasian/White	89%	82%
African-American/Black	1%	3%
Hispanic/Latino	1%	6%
Asian (incl. Indian subcontinent)	5%	3%
Multi-racial	3%	3%
American Indian/Alaskan Native	0%	0%
Pacific Islander	0%	0%
Other	0%	3%

Funder Characteristics

Measure	RIF 2010	RIF 2008	RIF 2003	Full Dataset Median	Community Foundation Median
Financial Information					
Total assets	\$424.1MM	\$508.5MM	\$350.6MM	\$269.3MM	\$482.0MM
Total giving	\$25.1MM	\$21.2MM	\$16.4MM	\$15.2MM	\$24.4MM
Administrative Expenses					
Administrative expense as percent of total assets	1.8%	1.5%	3.4%	1.1%	1.3%
Administrative expense as percent of total giving	31.1%	36.3%	72.5%	21.7%	31.1%
Funder Staffing					
Total staff (FTEs)	42	43	13	13	31
Percent of staff working directly with grantees	62%	N/A	N/A	94%	90%
Percent of staff who are program staff	26%	29%	100%	57%	32%
Percent of staff who are donor relations/development staff	26%	21%	N/A	21%	24%

Note: Some RIF 2003 and 2008 data on staff load not available.

Note: Excludes FTEs devoted to the operation of funder charitable programs.

Source: Self-reported data provided by RIF and other GPR and Operational Benchmarking Report (OBR) subscribers from 2003-2009 survey rounds.

Funders in Dataset

The 251 philanthropic funders whose grantees CEP has surveyed are listed below. Those that have received a GPR are denoted by an asterisk (*).

- The Abell Foundation, Inc.
- Adolph Coors Foundation
- The Ahmanson Foundation
- Alaska Mental Health Trust Authority*
- Alfred P. Sloan Foundation
- Alliance for California Traditional Arts*
- Alphawood Foundation
- Altman Foundation
- The Ambrose Monell Foundation
- Amelia Peabody Foundation
- Amon G. Carter Foundation
- Andersen Foundation
- Ann Arbor Area Community Foundation*
- The Annenberg Foundation
- The Anschutz Foundation
- Arcus Foundation*
- Arts Council Silicon Valley*
- The Assisi Foundation of Memphis, Inc.*
- The Atlantic Philanthropies*
- AVI CHAI Foundation*
- Baptist Community Ministries
- Barr Foundation*
- Beldon Fund*
- Bill & Melinda Gates Foundation*
- Blandin Foundation*
- Blue Cross Blue Shield of Massachusetts Foundation*
- Blue Shield of California Foundation*
- Boston Foundation, Inc.*
- Bradley Foundation
- Bradley-Turner Foundation
- The Broad Foundation*
- The Brown Foundation*
- Bush Foundation*
- The California Endowment*
- California HealthCare Foundation*
- The California Wellness Foundation
- The Cannon Foundation, Inc.
- Caring for Colorado Foundation*
- Carnegie Corporation of New York*
- Carrie Estelle Doheny Foundation
- The Case Foundation*
- Central Indiana Community Foundation*
- The Champlin Foundations
- Charles and Helen Schwab Foundation*
- Charles and Lynn Schusterman Family Foundation*
- Charles Stewart Mott Foundation*
- The Chicago Community Trust*
- The Christensen Fund*
- The Clark Foundation
- Claude Worthington
- Benedum Foundation*
- The Cleveland Foundation*
- The Clowes Fund*
- The Collins Foundation
- The Colorado Health Foundation*
- Colorado Trust*
- The Columbus Foundation and Affiliated Organizations*
- Community Foundation Silicon Valley*
- Community Memorial Foundation*
- Community Technology Foundation of California*
- Connecticut Health Foundation, Inc.*
- Conrad N. Hilton Foundation*
- Daniels Fund
- Danville Regional Foundation*
- The David and Lucile Packard Foundation*
- Dekko Foundation, Inc.*
- Doris Duke Charitable Foundation*
- The Duke Endowment*
- Dyson Foundation*
- E. Rhodes & Leona B. Carpenter Foundation
- East Bay Community Foundation*
- Eden Hall Foundation
- The Educational Foundation of America*
- El Pomar Foundation
- Endowment for Health*
- The Energy Foundation*
- The Erie Community Foundation*
- Eugene and Agnes E. Meyer Foundation*
- Evelyn and Walter Haas, Jr. Fund*
- F. M. Kirby Foundation, Inc.
- The F.B. Heron Foundation*
- The Fan Fox and Leslie R. Samuels Foundation
- Fannie Mae Foundation*
- First 5 Alameda County – Every Child Counts*
- The Ford Family Foundation*
- The Ford Foundation*
- France-Merrick Foundation
- Friends Provident Foundation*
- The Frist Foundation
- The GAR Foundation*
- Gates Family Foundation
- Gaylord and Dorothy Donnelley Foundation*
- General Mills Foundation*
- The George Gund Foundation*
- The George S. and Dolores Dore Eccles Foundation
- Geraldine R. Dodge Foundation*
- The Gill Foundation*
- The Goizueta Foundation*
- Gordon and Betty Moore Foundation*
- Grable Foundation*
- Grand Rapids Community Foundation*
- The Greater Cincinnati Foundation*
- Gulf Coast Community Foundation of Venice*
- Hall Family Foundation
- Harold K.L. Castle Foundation*
- The Harry and Jeanette Weinberg Foundation, Inc.*
- Hartford Foundation for Public Giving*
- The Harvest Foundation of the Piedmont
- Health Foundation of Greater Cincinnati*
- The Heinz Endowments*
- Helen Andrus Benedict Foundation*
- Henry H. Kessler Foundation*
- Hess Foundation, Inc.
- Horace W. Goldsmith Foundation
- The Horizon Foundation for New Jersey*
- Houston Endowment, Inc.*
- HRJ Consulting*
- The Hyams Foundation, Inc.
- J. A. & Kathryn Albertson Foundation
- J. Bulow Campbell Foundation
- The J. Willard and Alice S. Marriott Foundation
- Jacob and Valeria Langeloth Foundation*
- James Graham Brown Foundation, Inc.
- The James Irvine Foundation*
- The Jay and Rose Phillips Family Foundation
- Jessie Ball duPont Fund*
- Jessie Smith Noyes Foundation*
- The Josiah Macy, Jr. Foundation*
- The John A. Hartford Foundation, Inc.*
- John D. and Catherine T. MacArthur Foundation*
- John P. McGovern Foundation
- The John R. Oishei Foundation*
- John S. and James L. Knight Foundation*
- Kalamazoo Community Foundation*
- Kansas Health Foundation*
- Kate B. Reynolds Charitable Trust
- Kendeda Fund*
- The Kresge Foundation*
- Kronkosky Charitable Foundation*
- The Lenfest Foundation, Inc.
- Levi Strauss Foundation*
- Lloyd A. Fry Foundation*
- Longwood Foundation*
- The Louis Calder Foundation
- Lucile Packard Foundation for Children's Health*
- Lumina Foundation for Education, Inc.*
- Maine Community Foundation*
- Maine Health Access Foundation*
- Marguerite Casey Foundation*
- Mary Reynolds Babcock Foundation*
- Mathile Family Foundation
- The McKnight Foundation*
- Medina Foundation*
- MetroWest Community
- Health Care Foundation*
- Meyer Memorial Trust
- Michael Reese Health Trust*
- The Minneapolis Foundation*
- Missouri Foundation for Health*
- The Morris and Gwendolyn Cafritz Foundation
- Ms. Foundation for Women*
- The Mt. Sinai Health Care Foundation*
- The Nathan Cummings Foundation*
- Nellie Mae Education Foundation*
- The New Hampshire Charitable Foundation*
- New Profit, Inc.*
- New York Community Trust*
- New York State Health Foundation*
- Nina Mason Pulliam Charitable Trust*
- Nord Family Foundation*
- Northwest Area Foundation*
- Northwest Health Foundation*
- Omidyar Foundation*
- One Foundation*
- Ontario Trillium Foundation*
- The Overbrook Foundation
- Partnership for Excellence in Jewish Education (PEJE)*
- Paul G. Allen Foundations*
- Paul Hamlyn Foundation*
- Peninsula Community Foundation*
- The Pears Foundation*
- The Peter and Elizabeth C. Tower Foundation*
- PetSmart Charities*
- The Pew Charitable Trusts
- Philadelphia Foundation*
- The Pittsburgh Foundation*
- Polk Bros. Foundation*
- Pritzker Foundation
- PSEG Foundation and Corporate Responsibility Department*
- Public Welfare Foundation
- Quantum Foundation
- The Ralph M. Parsons Foundation
- Raskob Foundation for Catholic Activities, Inc.*
- Rasmuson Foundation*
- The Raymond John Wean Foundation*
- Resources Legacy Fund*
- The Rhode Island Foundation*
- Richard & Rhoda Goldman Fund*
- Richard King Mellon Foundation
- Richard M. Fairbanks Foundation*
- Robert R. McCormick Tribune Foundation
- The Robert Wood Johnson Foundation*
- The Robin Hood Foundation*
- Rockefeller Brothers Fund*
- Rockefeller Foundation*
- Rollin M. Gerstacker Foundation
- Rose Community Foundation*
- Russell Family Foundation*
- Ruth Mott Foundation*
- S & G Foundation, Inc.
- S. H. Cowell Foundation*
- Saint Luke's Foundation of Cleveland, Ohio*
- The Saint Paul Foundation Inc.*
- Santa Barbara Foundation*
- SC Ministry Foundation*
- Sea Change Foundation*
- Shelton Family Foundation
- The Sherman Fairchild Foundation, Inc.
- The Shubert Foundation
- The Skillman Foundation*
- The Skoll Foundation*
- Stuart Foundation*
- Surdna Foundation, Inc.*
- Susan G. Komen Breast Cancer Foundation*
- T.L.L. Temple Foundation
- Thrivent Financial for Lutherans Foundation*
- United Way of Massachusetts Bay
- Vancouver Foundation*
- The Vermont Community Foundation*
- Victoria Foundation, Inc.
- Virginia G. Piper Charitable Trust*
- W. K. Kellogg Foundation*
- Wachovia Regional Foundation*
- Waitt Family Foundation
- The Wallace Foundation*
- Walter & Elise Haas Fund*
- Wayne & Gladys Valley Foundation*
- Weingart Foundation
- Wellington Management Charitable Fund*
- Wilburforce Foundation*
- The William and Flora Hewlett Foundation*
- The William K. Warren Foundation
- William Penn Foundation*
- The William Randolph Hearst Foundations
- The William Stamps Farish Fund
- William T. Kemper Foundation
- Williamsburg Community Health Foundation*
- Windgate Charitable Foundation, Inc.
- Winter Park Health Foundation*
- Woods Fund of Chicago*
- Yad Hanadiv*
- Zeist Foundation*
- Z. Smith Reynolds Foundation, Inc.*

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About the Center for Effective Philanthropy (CEP)

Mission

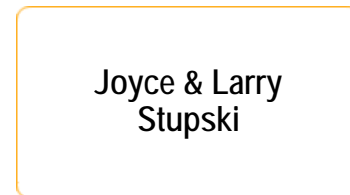
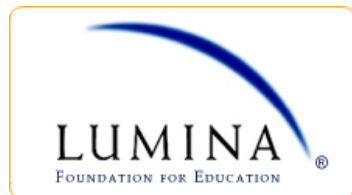
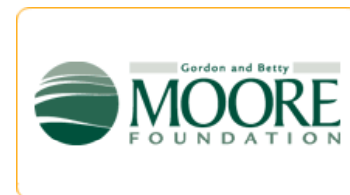
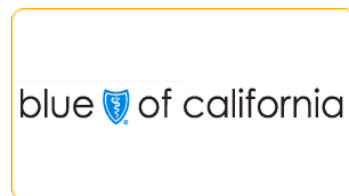
To provide data and create insight so philanthropic funders can better define, assess, and improve their effectiveness and impact.

Vision

We seek a world in which pressing social needs are more effectively addressed. We believe improved effectiveness of philanthropic funders can have a profoundly positive impact on nonprofit organizations and the people and communities they serve.

CEP Funders

CEP is funded through a combination of foundation grants and revenue earned from management tools and seminars. Funders providing support for CEP's work include:



CEP Research

CEP's research and creation of comparative data sets leads to the development of assessment tools, publications serving the philanthropic funder field, and programming. CEP's research initiatives focus on several subjects, including:

Research Focus	CEP Publication
Performance Assessment	<i>Toward a Common Language: Listening to Foundation CEOs and Other Experts Talk About Performance Measurement in Philanthropy</i> (2002)
	<i>Indicators of Effectiveness: Understanding and Improving Foundation Performance</i> (2002)
	<i>Assessing Performance at the Robert Wood Johnson Foundation: A Case Study</i> (2004)
Funder Strategy	<i>Beyond the Rhetoric: Foundation Strategy</i> (2007)
	<i>Lessons from the Field: Becoming Strategic: The Evolution of the Flinn Foundation</i> (2009)
	<i>The Essentials of Foundation Strategy</i> (2009)
	<i>Lessons from the Field: Striving for Transformative Change at the Stuart Foundation</i> (2009)
Funder Governance	<i>Foundation Governance: The CEO Viewpoint</i> (2004)
	<i>Beyond Compliance: The Trustee Viewpoint on Effective Foundation Governance</i> (2005)
Funder-Grantee Relationships	<i>Listening to Grantees: What Nonprofits Value in Their Foundation Funders</i> (2004)
	<i>Foundation Communications: The Grantee Perspective</i> (2006)
	<i>In Search of Impact: Practices and Perceptions in Foundations' Provision of Program and Operating Grants to Nonprofits</i> (2006)
	<i>Luck of the Draw</i> (2007)
	<i>Working with Grantees: The Keys to Success and Five Program Officers Who Exemplify Them</i> (2010)
Managing Operations	<i>Lessons from the Field: Improving the Experience at the David and Lucile Packard Foundation</i> (2008)
	<i>Lessons from the Field: Aiming for Excellence at the Wallace Foundation</i> (2008)
Non-Monetary Assistance	<i>More than Money: Making a Difference with Assistance Beyond the Grant</i> (2008)

CEP Assessment Tools

CEP provides philanthropic funder leaders with assessment tools – utilizing comparative data – that inform performance assessment:

- **Grantee Perception Report® (GPR):** provides CEOs, boards, and staff with comparative data on grantee perceptions of funder performance on a variety of dimensions
- **Applicant Perception Report (APR):** a companion to the GPR that provides comparative data from surveys of declined grant applicants
- **Comparative Board Report (CBR):** provides data on board structure and trustee perceptions of board effectiveness on a comparative basis
- **Staff Perception Report (SPR):** explores philanthropic funder staff members' perceptions of funder effectiveness and job satisfaction on a comparative basis
- **Operational Benchmarking Report (OBR):** provides comparative data, relative to a selected peer group of funders, on aspects of philanthropic funder operations – including organization staffing, program officer workload, grant processing times, and administrative costs
- **Stakeholder Assessment Report (STAR):** delivers insight about a funder's effectiveness by surveying stakeholders a funder seeks to influence as part of its strategy
- **Multidimensional Assessment Process (MAP):** provides an integrated assessment of performance, assimilating results and data from all of CEP's assessment tools into key findings, implications, and recommended action steps for greater effectiveness
- **Donor Perception Report (DPR):** creates insight, on a comparative basis, about donors' perceptions of the community foundations to and through which they contribute or establish funds
- **Beneficiary Perception Report (BPR):** informs the work of funders and grantees by providing comparative feedback from those whose lives funders seek to improve – the ultimate beneficiaries of funders' philanthropic efforts

Contact Information

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