

# Grantee Perception Report®

prepared for

## Blue Shield of California Foundation

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EFFECTIVE PHILANTHROPY

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# Executive Summary – Key Findings

Across several areas in the report, Blue Shield of California Foundation (“BSCF”) receives ratings that are similar to or higher than the ratings it received in its 2008 GPR. The Foundation continues to sustain strong impact in grantees’ fields, and is rated similarly to the typical funder on key measures including grantee satisfaction and the clarity with which the Foundation communicates its goals and strategies. Grantees report that the Foundation is having an “unprecedented” and “very important impact” on their fields. Grantees also frequently comment on the “essential funding” and “terrific” operating support that they receive from the Foundation through “streamlined” processes.

**BSCF is rated very positively on every field-related measure in the report.** More specifically, the Foundation is rated above the seventy-fifth percentile for its impact on grantees’ fields, its understanding of those fields, and the degree to which it both advances knowledge in the field and effects public policy. Grantees write of “collaboration” between the Foundation and the field and comment that BSCF’s commitment is “simply extraordinary.” All of the Foundation’s field ratings are either as positive or more positive than they were in 2008.

**BSCF grantees report satisfaction with the efficiency of the Foundation’s processes, but some also request deeper engagement with the Foundation.** BSCF grantees indicate that they had less frequent and slightly less positive interactions with Foundation staff members than they did in 2008. On one of these interactions measures, grantee comfort in approaching the Foundation should a problem arise, the Foundation is rated statistically significantly lower than it was in 2008. While many grantees comment positively on the “efficient” nature of their interactions with the Foundation, some grantees request more “face-to-face” interactions. Those grantees that experience site visits or discuss their completed evaluations with the Foundation rate BSCF higher for the quality of their relationships.

**The Foundation is rated only typically for its impact on grantee organizations.** When grantees were asked to give a suggestion for how the Foundation could improve, the largest proportion mentioned the characteristics of the grants provided by BSCF, and particularly the size of grants. BSCF provides grants that are smaller than typical, although grantees tend to be larger organizations with consistent funding from the Foundation. Those grantees who receive grants that are smaller than \$30,000 rate significantly lower for the Foundation’s impact on their organization. However, grantees are pleased with the operating support provided by the Foundation, indicating that it is “critical” to their organizations.

**Potential for BSCF’s provision of non-monetary assistance to be even more effective.** BSCF provides a typical proportion of grantees with more intensive patterns of non-monetary assistance, and grantees find this assistance “extremely helpful in...supporting communication, networking, best practices and shared standards.” Those grantees that receive assistance in these more intensive patterns rate higher on several key measures, including impact on fields, satisfaction, and the quality of their relationships with the Foundation, than do grantees who do not receive this assistance. However, grantees who received non-monetary assistance predominantly through a third-party rate the Foundation significantly lower than do other grantees on key measures including the Foundation’s fairness and its understanding of their fields.

**Health and Technology (Legacy) grantees rate lower than do other Foundation grantees.** They rate significantly lower on all three major impact measures in the GPR, among other measures. These grantees have been informed that they are being phased out of the Foundation’s grantmaking.

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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.<sup>1</sup>
  
- ♦ **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 Blue Shield of California Foundation (“BSCF”) during September and October 2010. CEP has surveyed BSCF’s grantees in the past. Where possible, ratings from these surveys are also shown in the report. The details of BSCF’s surveys are as follows:

Survey	Survey Period	Fiscal Year of Surveyed Grantees	Number of Grantees Surveyed	Number of Responses Received	Survey Response Rate <sup>1</sup>
BSCF 2010	September and October 2010	2009	435	306	70%
BSCF 2008	September and October 2008	2007	454	326	72%
BSCF 2006	February through April 2006	2005	403	297	74%

- ♦ CEP also asked BSCF grantees to identify the program area in which they received their grant. The number of respondents in each group is listed below. Please see page 24 (“Program Area”) for more details.

Program Areas <sup>2</sup>	Respondents
Health Care and Coverage	165
Blue Shield Against Violence	98
Health and Technology (Legacy)	36

- ♦ 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 seven years of surveys is 69 percent.

2: Three grantees indicated that they did not know their program area, and four did not respond to the question. These responses are not included in the Foundation’s segmentation by program area but are included in the Foundation’s overall average ratings.

## Methodology – Comparative Data

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

Full Comparative Set	
Grantee Responses	38,081 grantees
Philanthropic Funders	262 funders

- ◆ BSCF is also compared to a cohort of 17 health-focused funders. The 17 funders that comprise this group are:

Health-Focused Funders	
Blue Cross Blue Shield of Massachusetts Foundation	Connecticut Health Foundation, Inc.
Blue Cross Blue Shield of North Carolina Foundation	Endowment for Health
Blue Shield of California Foundation	The Harvest Foundation
The California Endowment	MetroWest Community Health Care Foundation
California HealthCare Foundation	Missouri Foundation for Health
The California Wellness Foundation	New York State Health Foundation
The Colorado Health Foundation	Northwest Health Foundation
Colorado Trust	Saint Luke’s Foundation of Cleveland, Ohio
Community Memorial 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, BSCF tends to provide smaller grants. The Foundation also tends to provide a larger than typical proportion of its grantees with operating support.

Survey Item	BSCF 2010	BSCF 2008	BSCF 2006	Full Dataset Median	Health-Focused Funder Median
<b>Grant Size</b>					
Median grant size	\$40K	\$40K	\$30K	\$60K	\$65K
<b>Grant Length</b>					
Average grant length	2.0 years	2.0 years	1.6 years	2.1 years	2.1 years
Percent of grantees receiving multi-year grants	54%	55%	30%	49%	59%
<b>Type of Support</b>					
Percent of grantees receiving operating support	61%	55%	44%	20%	17%
Percent of grantees receiving program/project support	32%	40%	52%	64%	69%
Percent of grantees receiving other types of support	7%	5%	4 %	16%	14%

### BSCF Analysis – Variation by Type of Support

Grantees who received operating support rate the Foundation significantly higher than those who did not on:

- ♦ Impact on and understanding of grantees' fields
- ♦ Impact on and understanding of grantees' organizations
- ♦ Strength of relationship with the Foundation
- ♦ Consistency of communications resources



# Structural Characteristics of Grantees

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

Survey Item	BSCF 2010	BSCF 2008	BSCF 2006	Full Dataset Median	Health-Focused Funder Median
<b>Budget of Funded Organizations</b>					
Typical organizational budget	\$4.0MM	\$3.0MM	\$2.8MM	\$1.4MM	\$1.3MM
<b>Duration of Funded Program and Grantee Organization<sup>1</sup></b>					
Programs conducted 6 years or more	35%	44%	N/A	33%	23%
Median length of establishment of grantee organizations	31 years	30 years	28 years	24 years	23 years
<b>First-Time Grantees<sup>2</sup></b>					
Percentage of first-time grants	9%	N/A	N/A	30%	N/A

1: BSCF 2006 data not available due to changes in the survey instrument.

2: Represents data from 45 funders. BSCF 2008, BSCF 2006, health-focused funder median data not available due to changes in 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

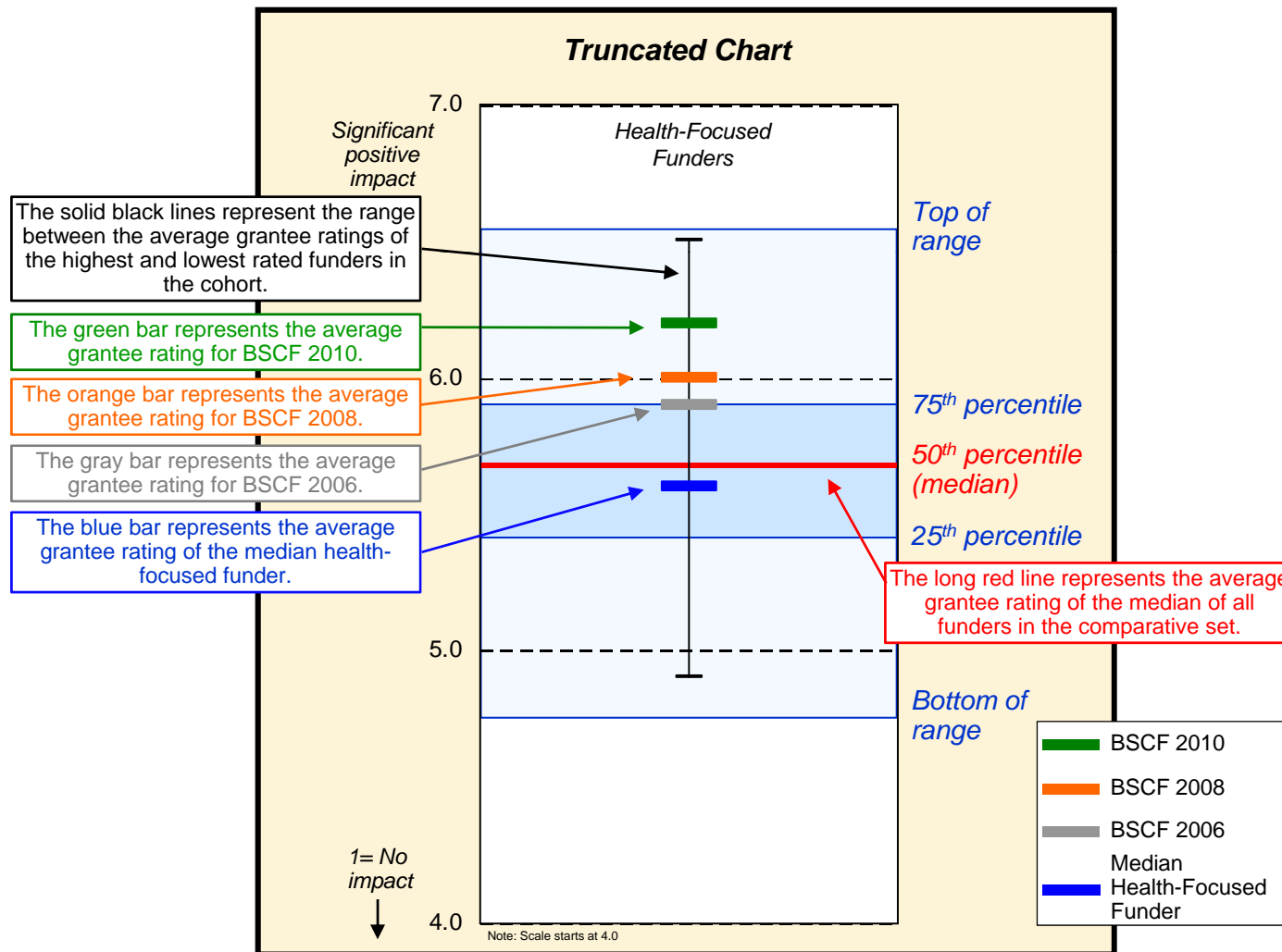
- ◆ This table is intended to provide context to the Foundation in thinking about its GPR results relative to its grantmaking and staffing. This information is based on IRS filings and data supplied by philanthropic funders that have subscribed to the GPR.
- ◆ The number of dollars awarded and the number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

Survey Item	BSCF 2010	BSCF 2008	BSCF 2006	Full Dataset Median	Health-Focused Funder Median
<b>Program Staff Load</b>					
Dollars awarded per professional program staff full-time employee	\$6.9MM	\$6.3MM	\$2.8MM	\$3.5MM	\$2.1MM
Applications per professional program full-time employee	54 applications	120 applications	96 applications	38 applications	33 applications
Grants awarded per professional program full-time employee	49 grants	71 grants	94 grants	30 grants	23 grants
Active grants per professional program full-time employee	95 grants	108 grants	99 grants	49 grants	39 grants

Note: Funders of different sizes and focuses choose to structure their organizations differently – so, as with all the information contained in this report, the Foundation should interpret data in this section in light of its distinctive goals and strategy. For additional information on funder characteristics related to these survey items, 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 BSCF, over a background that shows percentiles for the average ratings for the full comparative set of 262 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.**



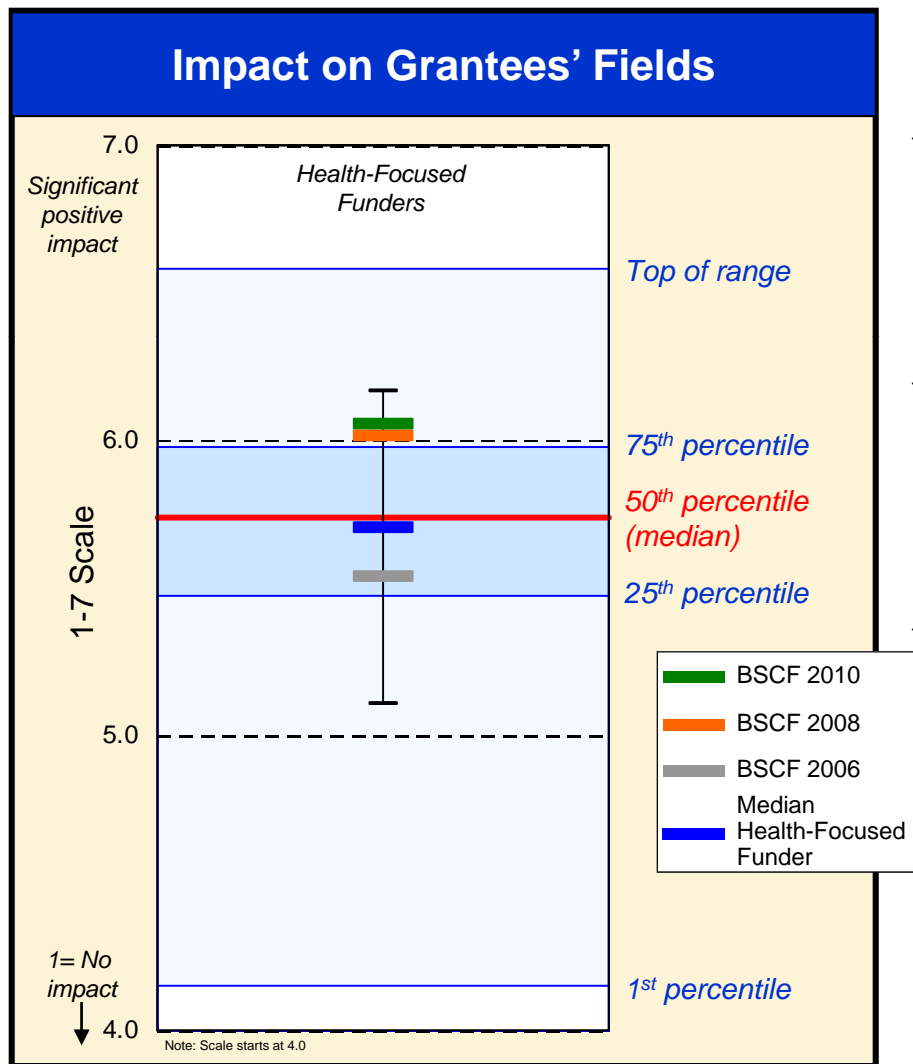
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# Impact on Grantees' Fields

On impact on grantees' fields, BSCF is rated:

- above the median funder
- above the median health-focused funder



## Selected Grantee Comments

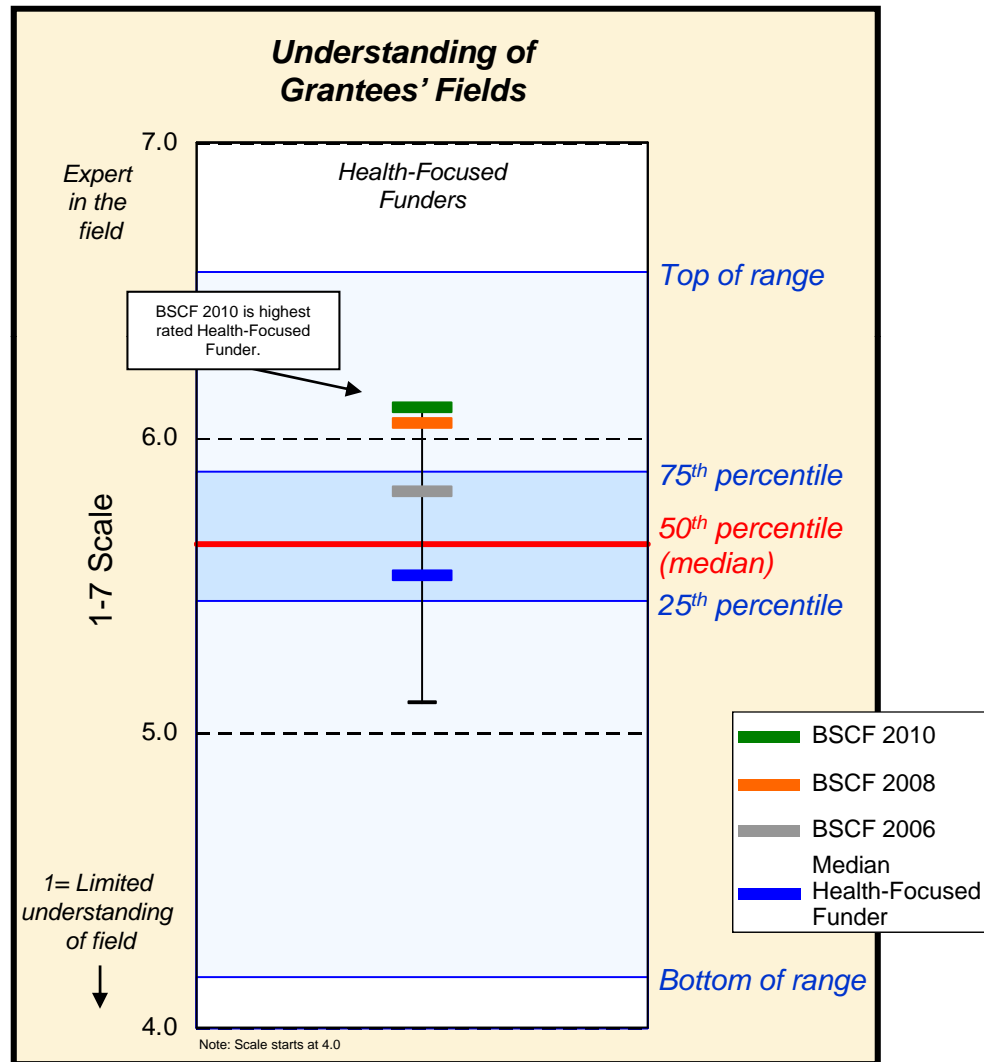
- ♦ *"The Foundation has been extremely responsive to the concerns and needs of the domestic violence field. At a time when programs are facing many challenges, the Foundation looked ahead and developed funding for programming which will allow agencies to grow and perfect their approaches."*
- ♦ *"I appreciate the Foundation's credibility in informing health insurance reform/policy issues as not only a funder but also as a philanthropic arm of a health insurance company. I believe this vantage point is a critical one in achieving successful implementation of health reform in California."*
- ♦ *"[Our] understanding [is that] the Foundation has moved away from supporting Health IT, so we are not aware of how the Foundation has impacted the field."*

Note: This question includes a "don't know" response option; 4 percent of BSCF 2010 respondents answered "don't know", compared to 9 percent at the median funder, 5 percent of BSCF 2008 respondents, 10 percent of BSCF 2006 respondents, and 8 percent of respondents at the median health-focused funder. 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, BSCF is rated:

- higher than ninety percent of funders
- higher than all other health-focused funders

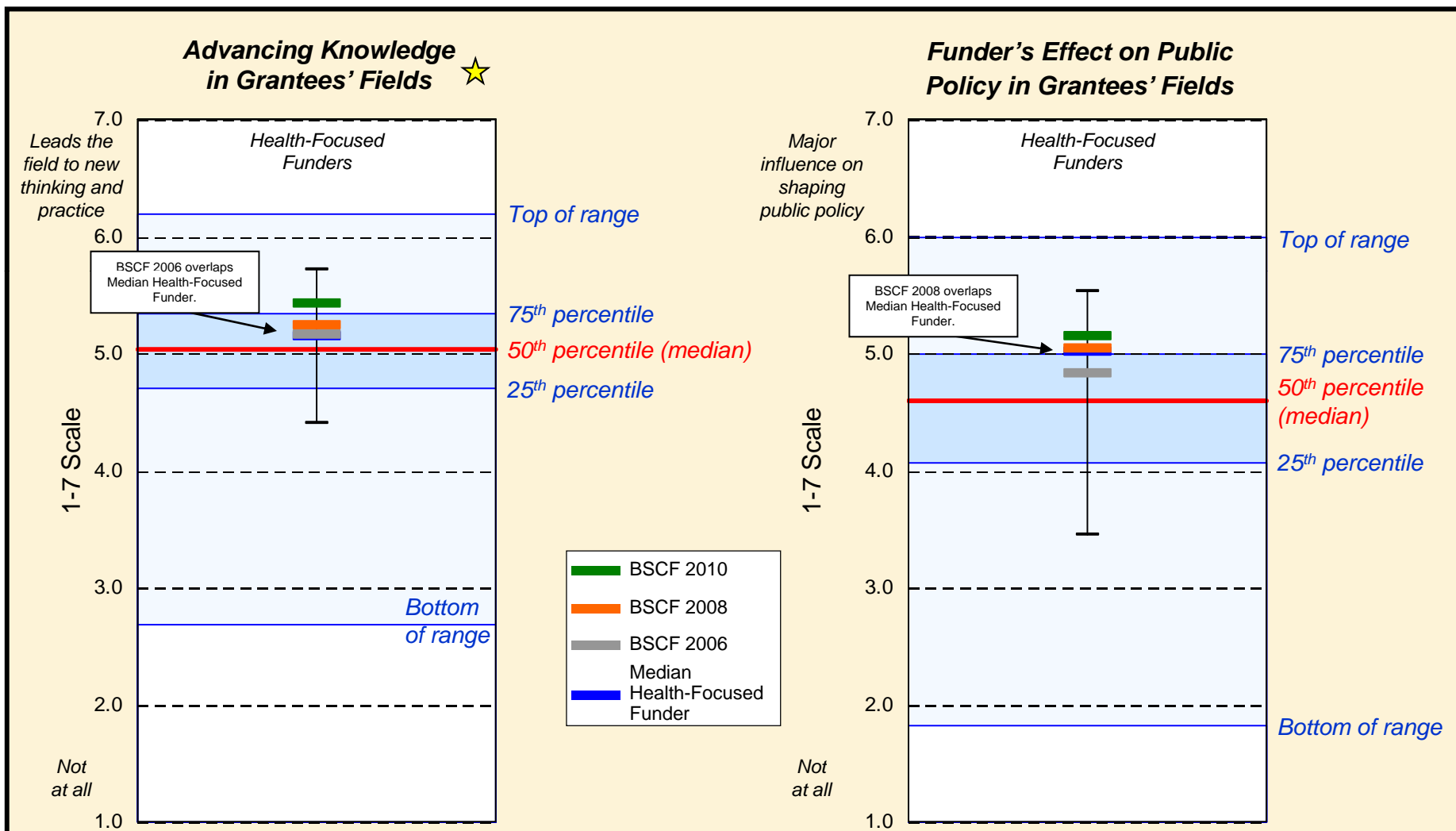


Note: This question includes a "don't know" response option; 4 percent of BSCF 2010 respondents answered "don't know", compared to 6 percent at the median funder, 7 percent of BSCF 2008 respondents, 12 percent of BSCF 2006 respondents, and 5 percent of respondents at the median health-focused funder.

# Advancing Knowledge in Fields and Effect on Public Policy

On advancement of knowledge in grantees' fields, BSCF is rated: On effect on public policy in grantees' fields, BSCF is rated:

- above the median funder
- above the median health-focused funder
- above the median funder
- similarly to the median health-focused funder



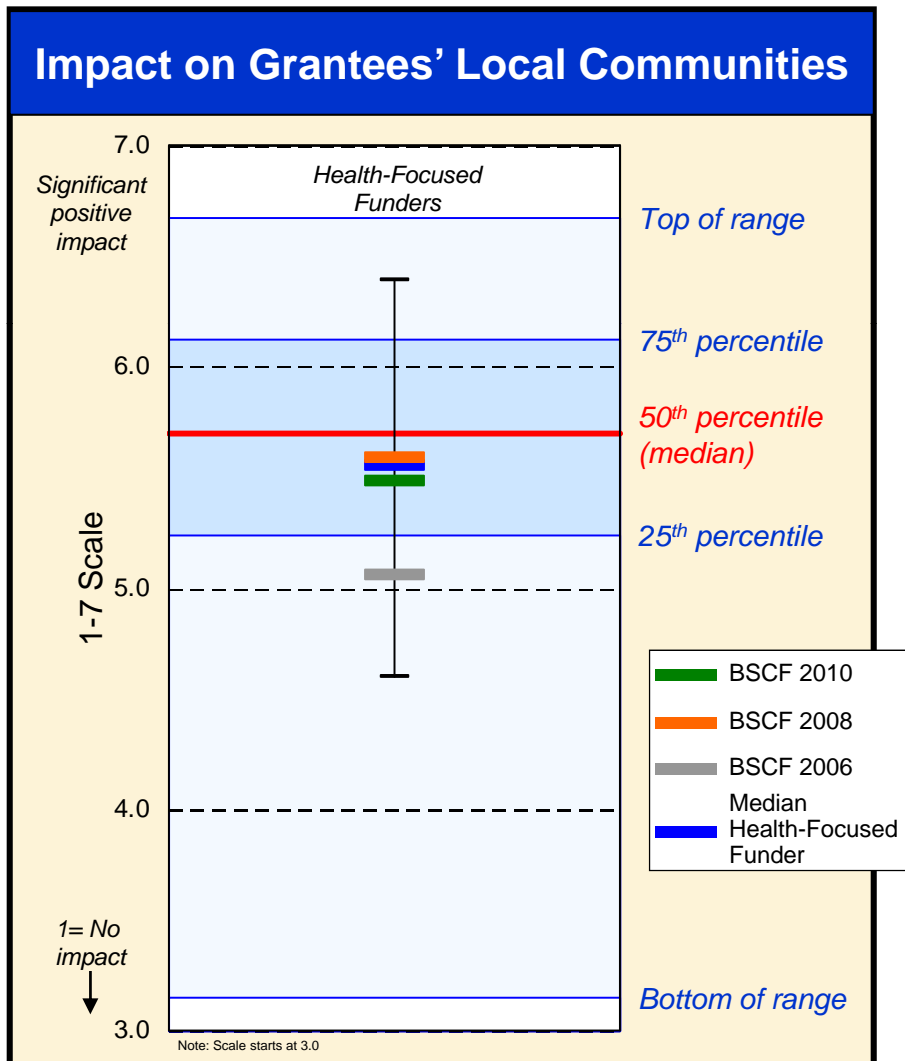
Note: The questions depicted on these charts include a "don't know" response option. In the left-hand chart, 17 percent of BSCF 2010 respondents answered "don't know", compared to 25 percent at the median funder, 26 percent of BSCF 2008 respondents, 35 percent of BSCF 2006 respondents, and 17 percent of respondents at the median health-focused funder. In the right-hand chart, 25 percent of BSCF 2010 respondents answered "don't know", compared to 40 percent at the median funder, 40 percent of BSCF 2008 respondents, 51 percent of BSCF 2006 respondents, and 25 percent of respondents at the median health-focused funder.

★ = BSCF 2010 rating is significantly higher than BSCF 2008 rating at a 90 percent confidence level.

# Impact on Grantees' Local Communities

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

- similarly to the median funder
- similarly to the median health-focused funder



## Selected Grantee Comments

- ♦ “Blue Shield is enabling low-income people who live in our community the opportunity to receive free medical care.”
- ♦ “BSCF understands the difficulty of [deploying new] technology in communities. The technology is the easy part .... It is all the other topics to be addressed that are most difficult. The patience, support, flexibility and encouragement as we navigated our community efforts were so appreciated.”
- ♦ “Our funding has been reduced by [hundreds of thousands of dollars by other sources]. This is not funding that can be accessed through our rural community. Blue Shield Foundation’s funding has made the difference in our ability to maintain 24 hour staffing.”

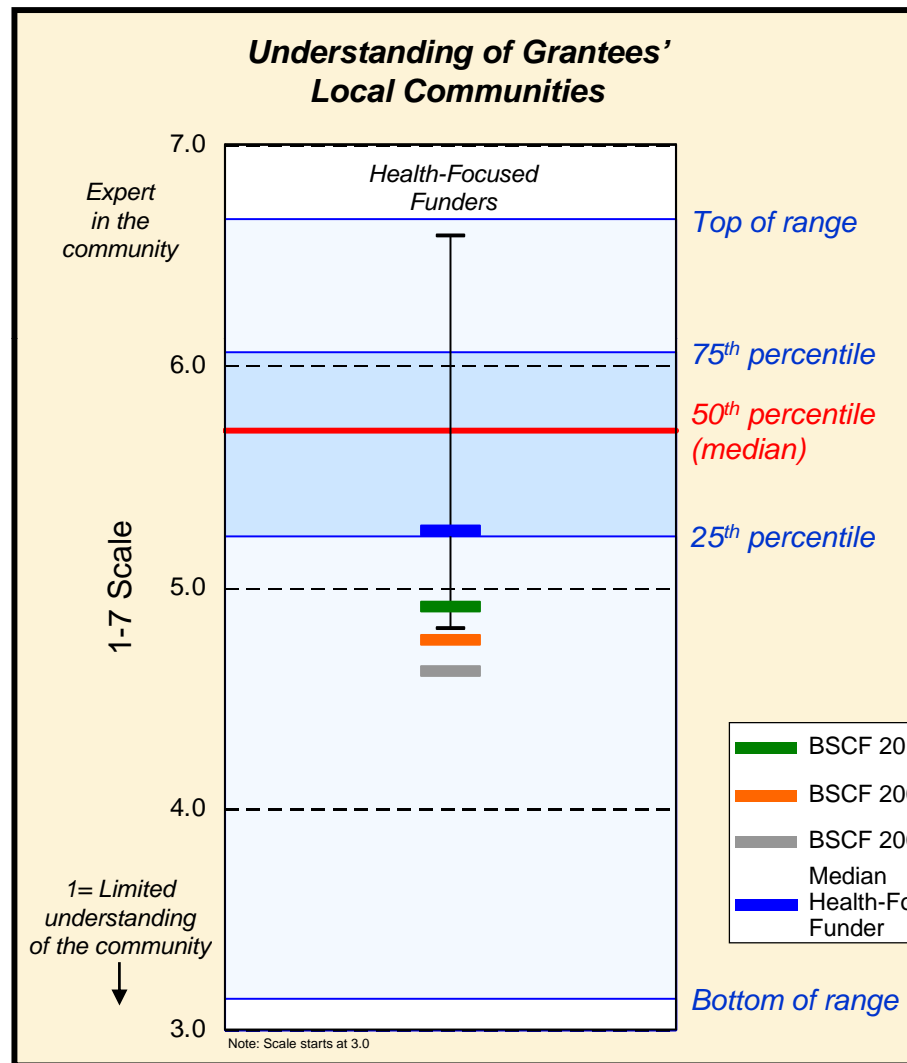
Note: This question includes a “don’t know” response option; 8 percent of BSCF 2010 respondents answered “don’t know”, compared to 10 percent at the median funder, 10 percent of BSCF 2008 respondents, 11 percent of BSCF 2006 respondents, and 10 percent of respondents at the median health-focused funder.



# Understanding of Grantees' Local Communities

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

- below the median funder
- below the median health-focused funder



Note: This question includes a "don't know/not applicable" response option; 19 percent of BSCF 2010 respondents answered "don't know/not applicable", compared to 13 percent at the median funder, 22 percent of BSCF 2008 respondents, 29 percent of BSCF 2006 respondents, and 11 percent of respondents at the median health-focused funder.

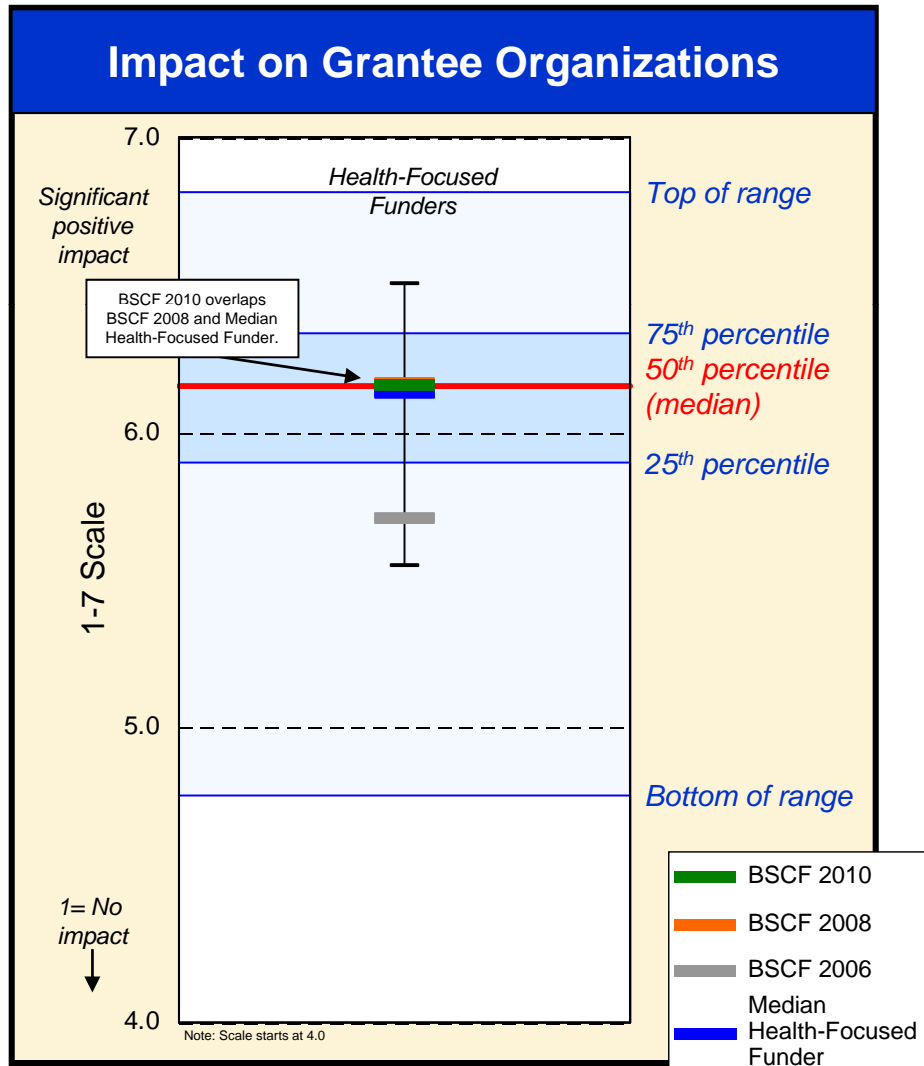
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# Impact on Grantee Organizations

On impact on grantee organizations, BSCF is rated:

- similarly to the median funder
- similarly to the median health-focused funder



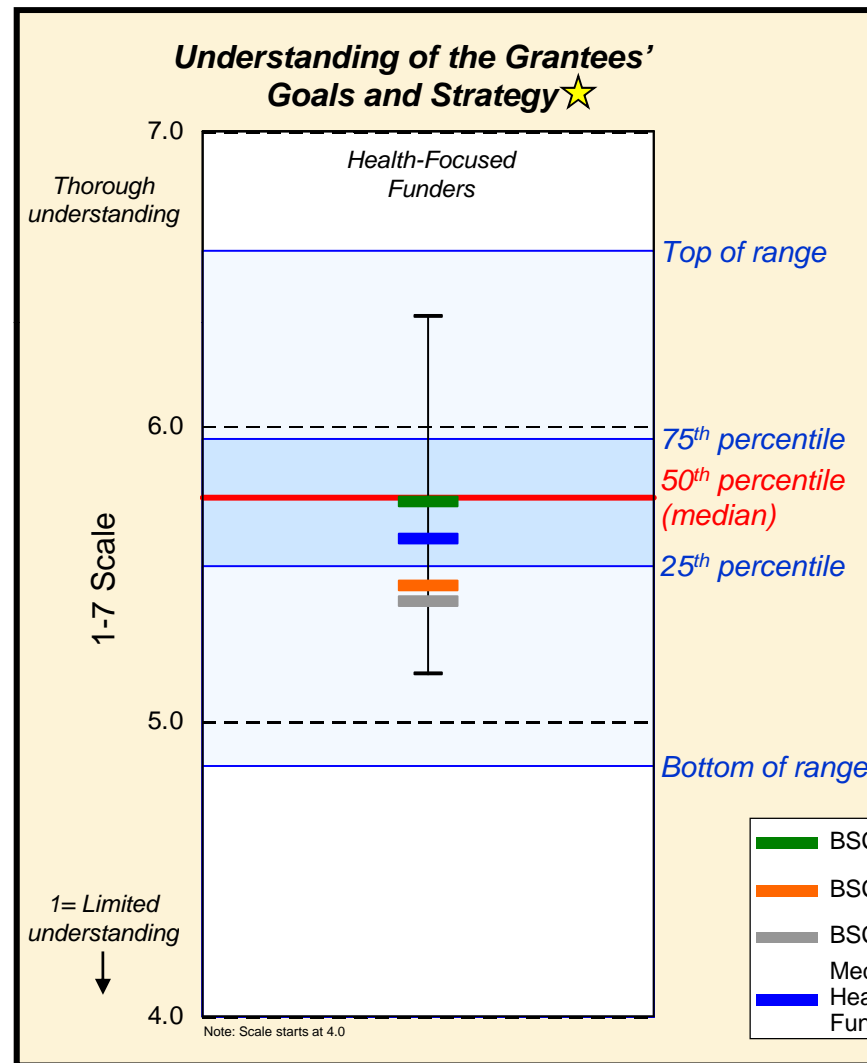
## Selected Grantee Comments

- ♦ *“It is difficult to understand how other foundations can develop funding priorities that do not relate to direct client care in this environment. This where the Foundation really stands out – they seem to ‘get it’ – the issues we are dealing with on a day-to-day basis.”*
- ♦ *“The Core Support Initiative has been extremely helpful in the field of domestic violence in providing general operating support, so that organizations can utilize the funding in ways that best suit the organization.”*
- ♦ *“They are sincere in their desire to help the field but they seem to think they know what is best for us rather than really listening to us.”*
- ♦ *“We also feel the Foundation has a sincere desire to keep abreast of our needs as it consistently surveys our needs and LISTENS!”*

# Understanding of Grantees' Goals and Strategy

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

- similarly to the median funder
- above the median health-focused funder



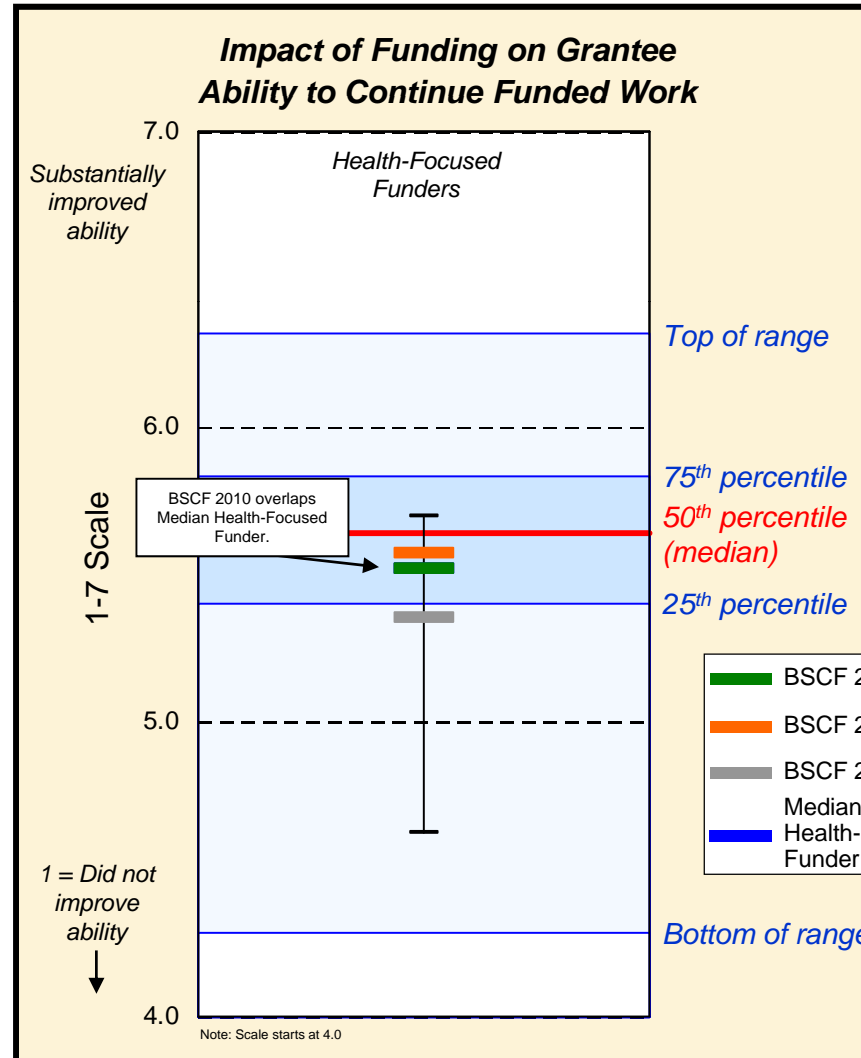
Note: This question includes a "don't know" response option; 9 percent of BSCF 2010 respondents answered "don't know", compared to 7 percent at the median funder, 17 percent of BSCF 2008 respondents, 24 percent of BSCF 2006 respondents, and 7 percent of respondents at the median health-focused funder.

★ = BSCF 2010 rating is significantly higher than BSCF 2008 rating at a 90 percent confidence level.

# 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, BSCF is rated:

- similarly to the median funder
- similarly to the median health-focused funder



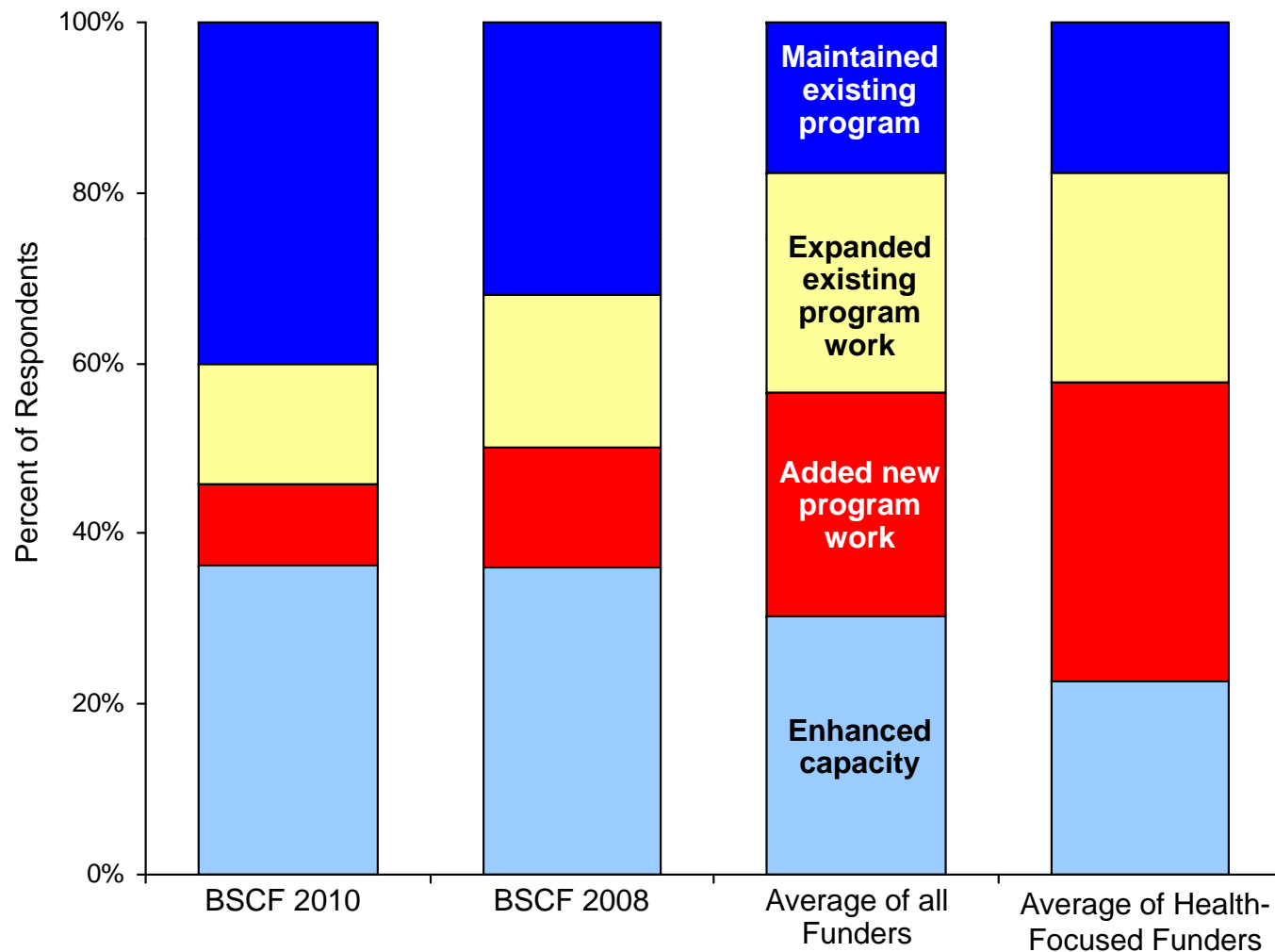
Note: This question includes a "don't know/not applicable" response option; 3 percent of BSCF 2010 respondents answered "don't know/not applicable", compared to 9 percent at the median funder, and 12 percent of respondents at the median health-focused funder.

# Grant Effect

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

- smaller than that of the average funder
- smaller than that of the average health-focused funder

**Primary Effect of Grant on Grantee's Organization**



**BSCF Analysis – Variation by Grant Effect**

BSCF grantees rate the Foundation differently based on the effect of the grant they received from the Foundation.

Grantees who primarily used their grant to maintain existing program work rate the Foundation significantly lower than those who did not on:

- ♦ Strength of relationship with the Foundation
- ♦ Comfort approaching the Foundation
- ♦ Helpfulness of the selection and reporting/evaluation processes

Grantees who primarily used their grant to enhance their overall capacity rate the Foundation significantly higher than those who did not on:

- ♦ Impact on grantees' organizations and communities
- ♦ Satisfaction
- ♦ Strength of relationships with the Foundation

# Grant Patterns Summary (1)

The grant patterns summary segments a funder’s grantmaking by grant characteristics that, across CEP’s dataset, are associated with higher and lower ratings of a funder’s impact on a grantee’s organization. The grant patterns take into account the size and duration of the funder’s grants as well as whether they’ve provided a recipient with general operating or program/project support.<sup>1</sup>

<i>Field-Wide Findings on Impact on Grantee Organization Ratings</i>		<b>Grant Patterns<sup>2</sup></b>
<b>Highest Ratings on Impact on Grantee Organization</b>	General operating support grant + Grant size \$25K or greater + Multi-year in length	
<b>Moderate Ratings on Impact on Grantee Organization</b>	Program/Project grant + Grant size \$25K or greater + Multi-year in length	
	OR	
	Program/Project grant + Grant size \$150K or greater + One year in length	
	OR	
<b>Lowest Ratings on Impact on Grantee Organization</b>	General operating support grant + Grant size \$10K-\$149K + One year in length	
	OR	
	Program/Project grant + Grant size \$25K-\$149K + One year in length	
	OR	
<b>Lowest Ratings on Impact on Grantee Organization</b>	Program/Project grant + Grant Size less than \$25K + Less than 5 years in length	
	OR	
<b>Lowest Ratings on Impact on Grantee Organization</b>	General operating support grant + Grant size less than \$10K + One year in length	

1: All other types of funding are excluded from the grant patterns.

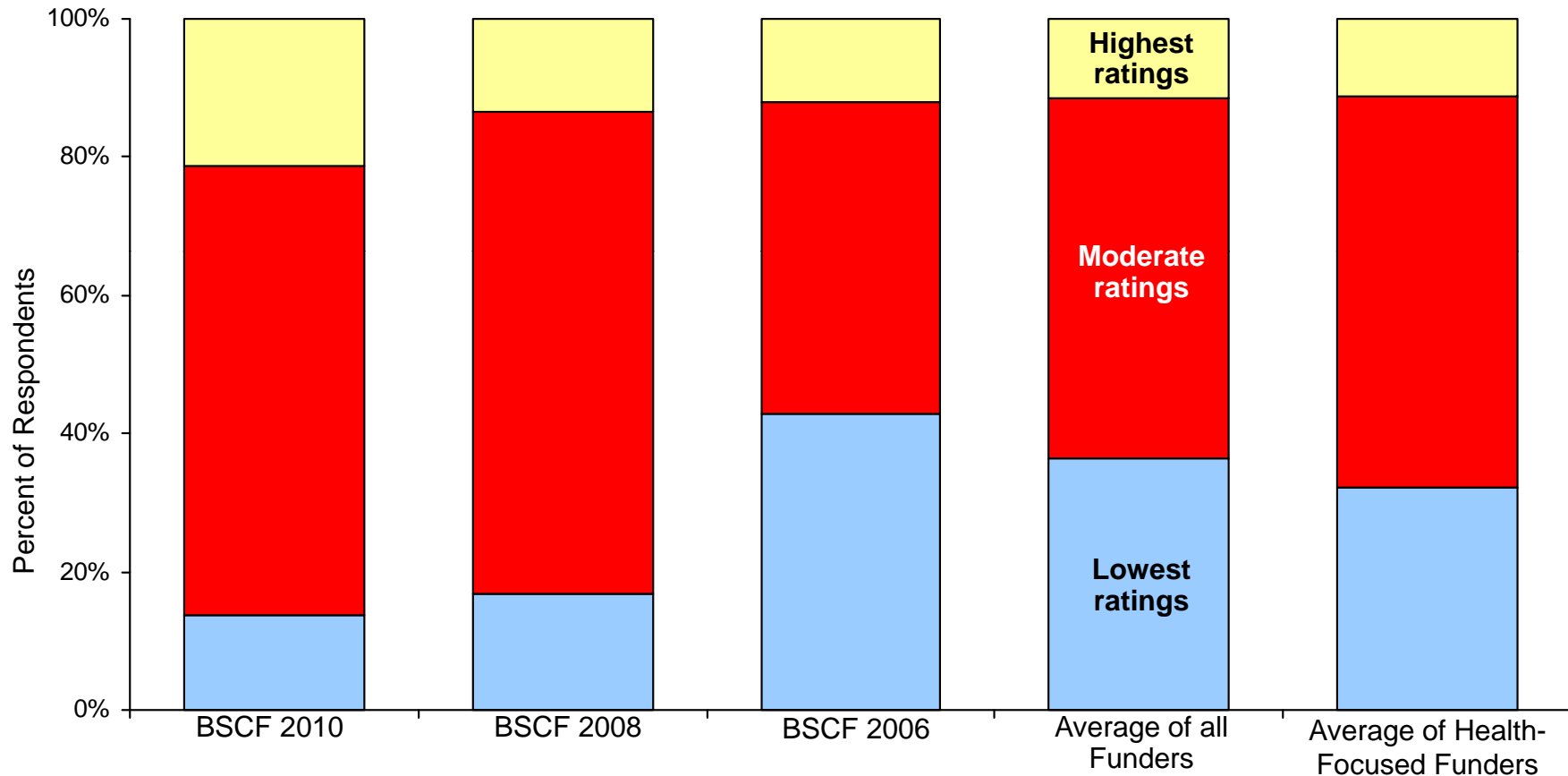
2: Grant patterns listed are representative of the majority of grants that fall within each group. Some patterns are not shown because they are infrequently awarded to grantees.

## Grant Patterns Summary (2)

The proportion of BSCF grantees that report receiving the grant pattern resulting in the highest impact on grantee organization ratings is:

- larger than that of the average funder
- larger than that of the average peer funder

**Grant Patterns**



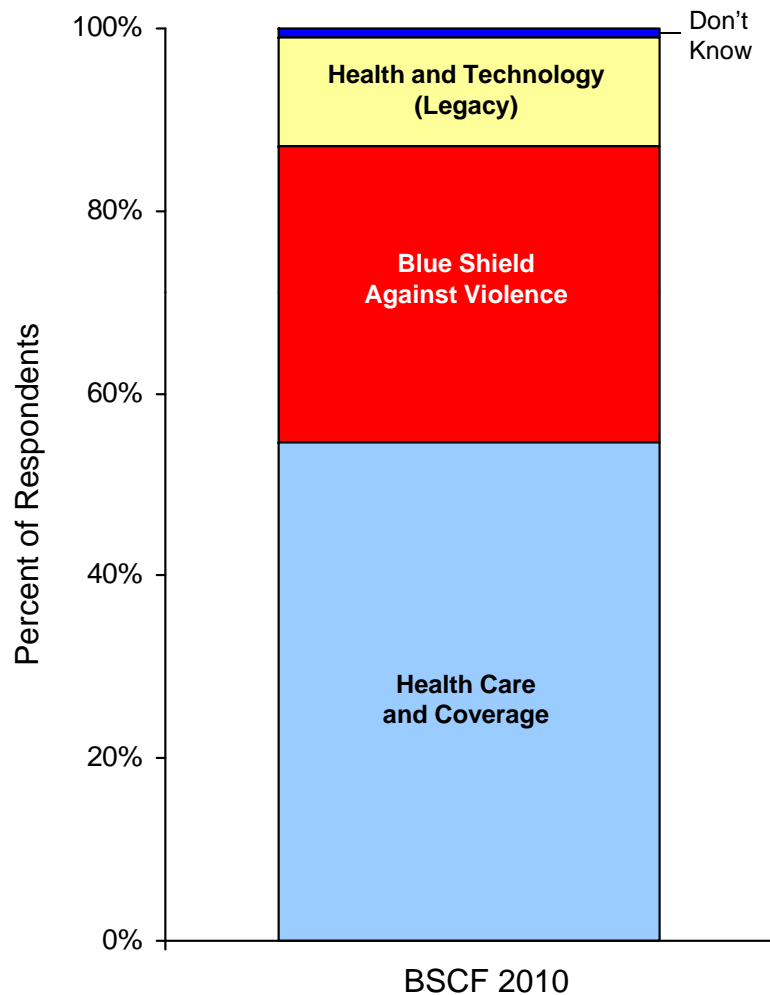
*Survey-Wide Analysis Fact:* By itself, type of grant awarded is not an important predictor of grantees' ratings of a philanthropic funder's impact on their organizations. However, ratings of impact on the grantee organization are higher for operating than program support grantees when those operating 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*.



# Program Area

BSCF grantees were asked to identify the program area from which they received their grant. Fifty-five percent of grantees reported receiving their grant as part of the Health Care and Coverage program area.

**Program Area**



**BSCF Analysis – Variation by Program Area**  
 BSCF grantees rate the Foundation differently based on their program area.

Health Care and Coverage grantees rate the Foundation significantly higher on:

- ◆ Understanding of grantees’ fields
- ◆ Impact on grantees’ local communities

Blue Shield Against Violence grantees rate the Foundation significantly higher on:

- ◆ Advancing knowledge in the field
- ◆ Strength of relationships
- ◆ Responsiveness
- ◆ Clarity of communication of goals and strategies

Health and Technology (Legacy) grantees rate the Foundation significantly lower on:

- ◆ Impact on grantees’ fields, organizations, and local communities
- ◆ Understanding of grantees’ fields and grantees’ organizations’ goals and strategy
- ◆ Advancing knowledge in the field
- ◆ Effect on public policy
- ◆ Satisfaction
- ◆ Clarity of communication of goals and strategies
- ◆ Responsiveness

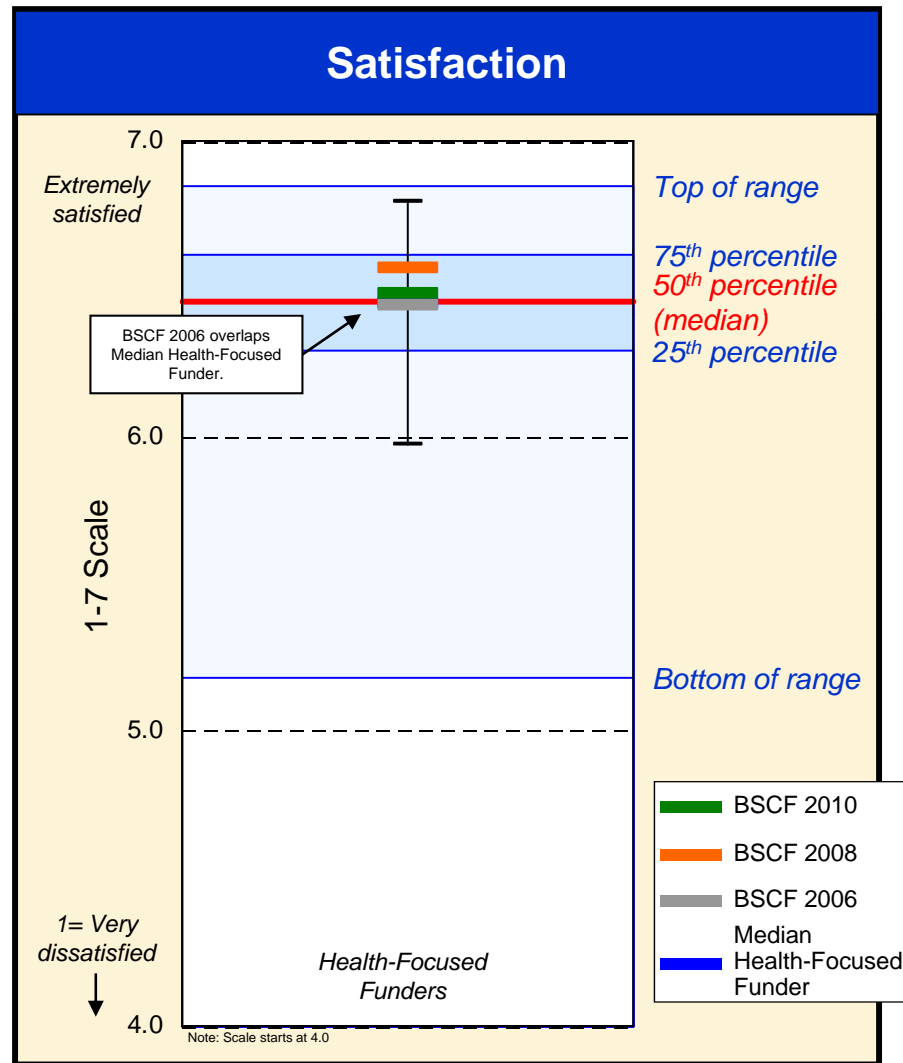
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# Satisfaction

On overall satisfaction, BSCF is rated:

- similarly to the median funder
- similarly to the median health-focused funder

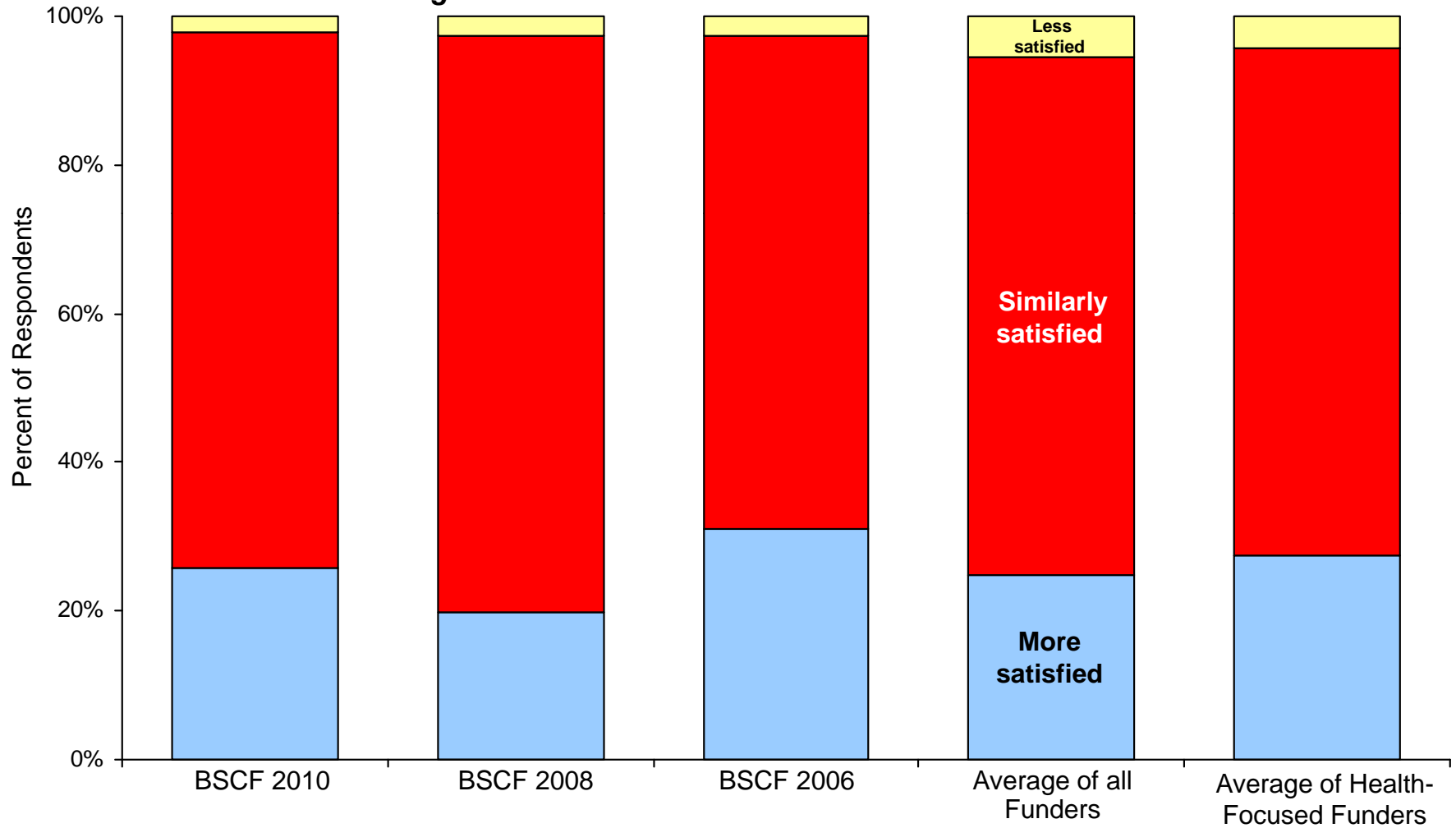


# Satisfaction Relative to Last Year

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

- similar to that of the average funder
- similar to that of the average health-focused funder

**Change in Satisfaction with the Funder from Last Year**



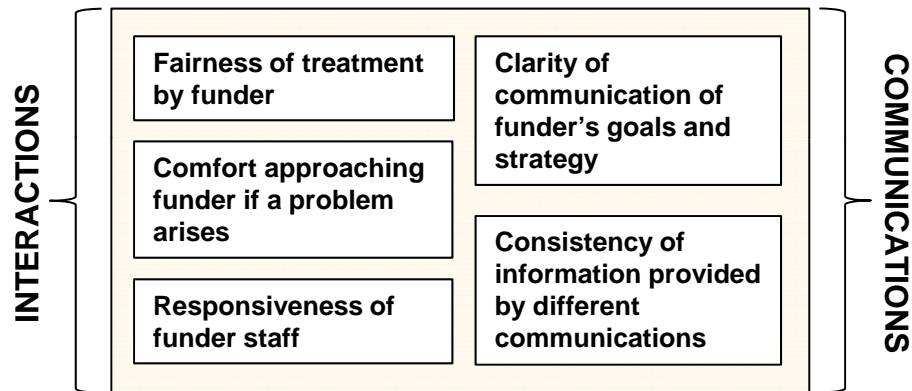
Note: Question asked of grantees that were receiving funding from the Foundation last year as well as this year.

# Funder-Grantee Relationships Summary

On this summary of key components of funder-grantee relationships, BSCF is rated:

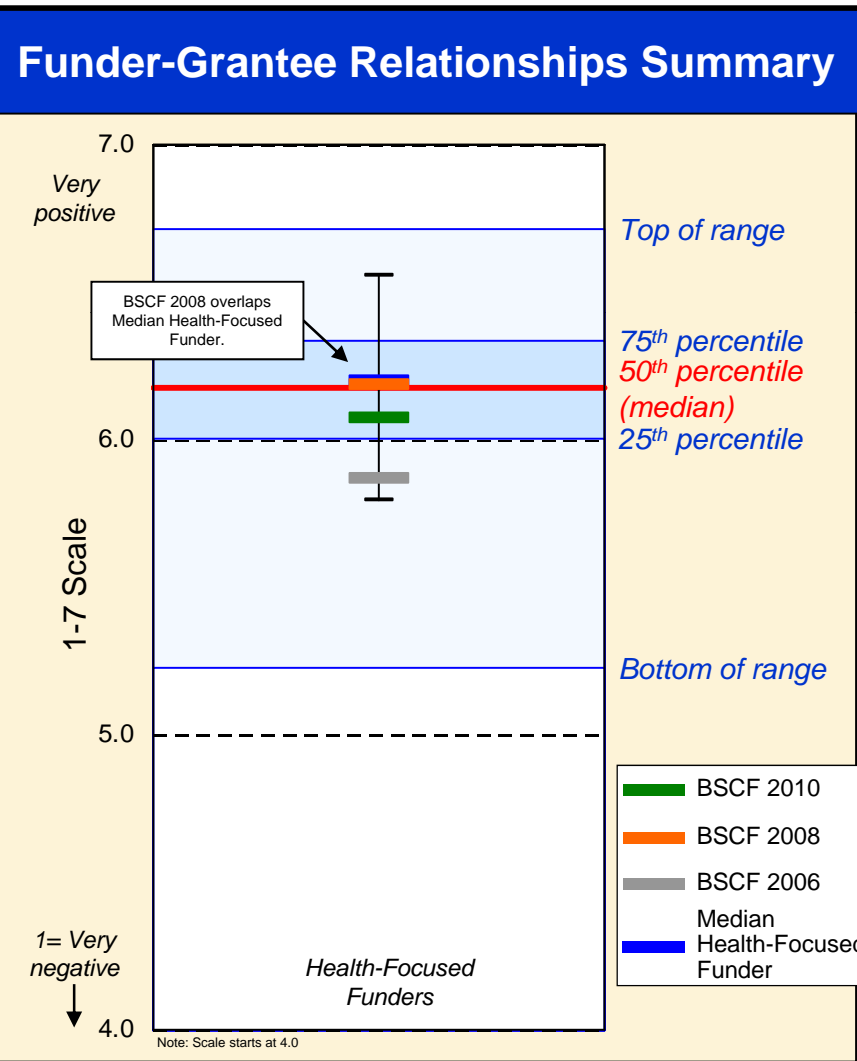
- below the median funder
- below the median health-focused funder

## Key Components of Funder-Grantee Relationships Measure



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

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



# Interactions Measures

On fairness of treatment of grantees, BSCF is rated:

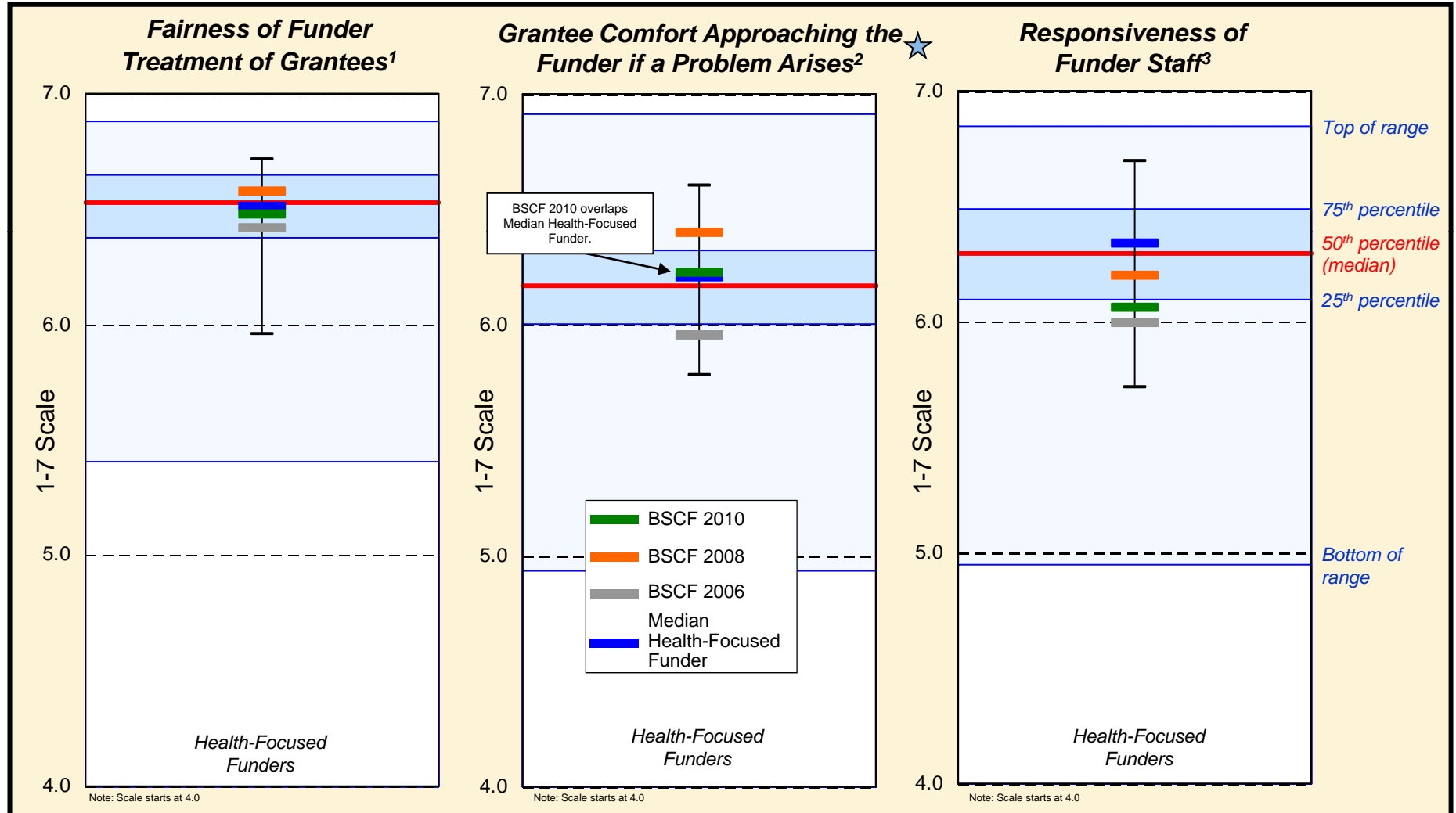
- similarly to the median funder
- similarly to the median health-focused funder

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

- similarly to the median funder
- similarly to the median health-focused funder

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

- below the median funder
- below the median health-focused funder



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

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

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

★ = BSCF 2010 rating is significantly lower than BSCF 2008 rating at a 90 percent confidence level.

## Selected Grantee Comments

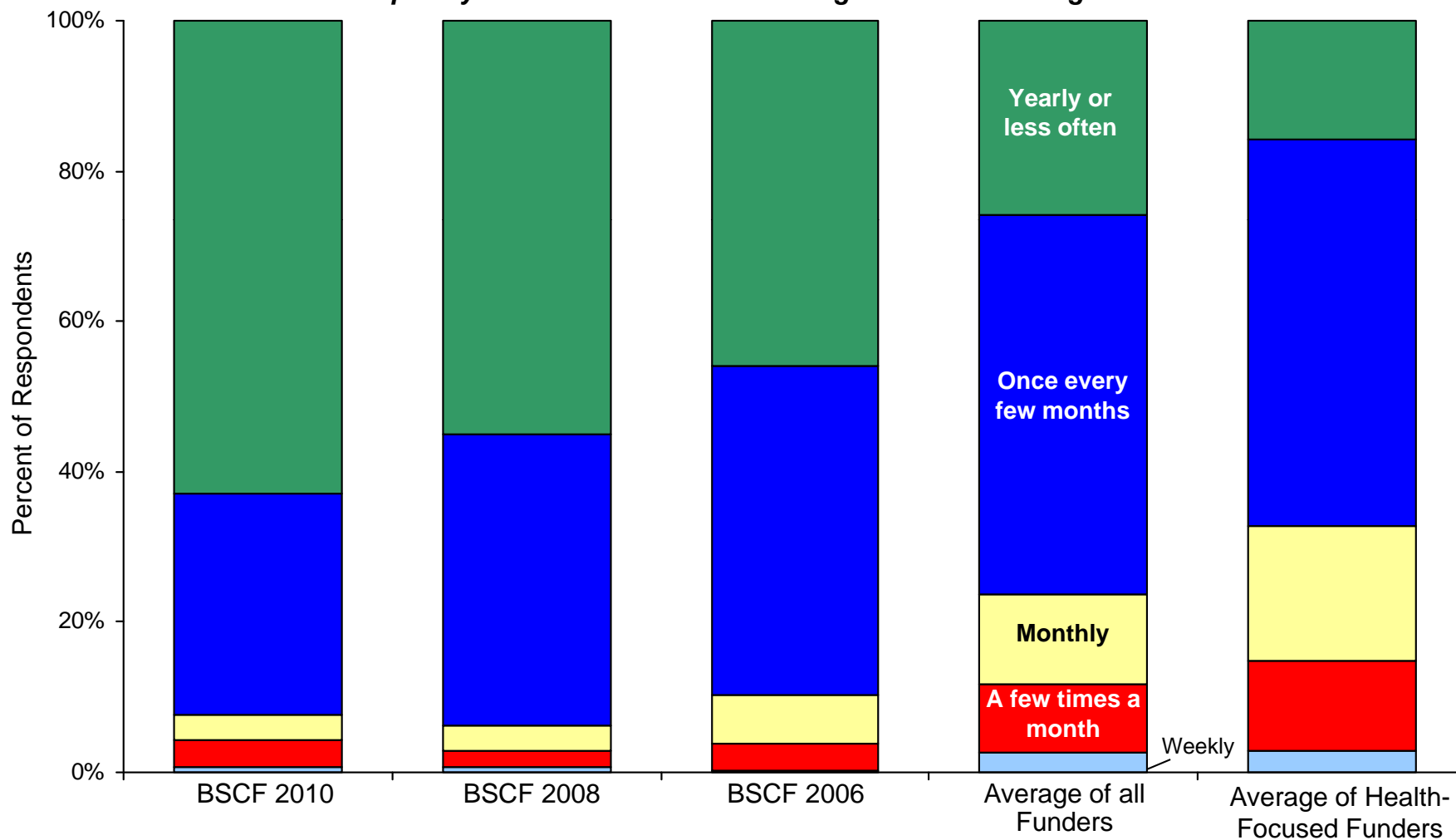
- ◆ *“Staff I interacted with have been professional and friendly. Overall, a somewhat hard group to penetrate.”*
- ◆ *“We found the consultant contracted by the BSCF as well as the current program officer to be excellent – open, responsive, communicative, clear, helpful and approachable.”*
- ◆ *“We find the processes and communications very helpful and easy to understand. We would, however, like to meet the staff face-to-face at least once a year. We would love for the staff to visit our clinic so as to better understand the value of the \$\$ that the Foundation provides.”*
- ◆ *“Our organization would be very open to more communication with the Blue Shield Foundation. It has been unclear who our primary contact is there, but we are very interested in deepening that relationship.”*
- ◆ *“In the past, we had a great relationship with the contact person who visited our offices and interacted with us. We would like to continue this relationship with the new person.”*
- ◆ *“I have found it extremely difficult to connect with staff at the Foundation regarding my awarded grant. I was not clear on who my project officer was for many months, once I knew who my project officer was it took several months to schedule a conference call due to her busy schedule.”*

# Frequency of Interactions

The proportion of BSCF grantees that report interacting with their program officer yearly or less often is:

- larger than that of the average funder
- larger than that of the average health-focused funder

*Frequency of Grantee Contact with Program Officer During Grant*



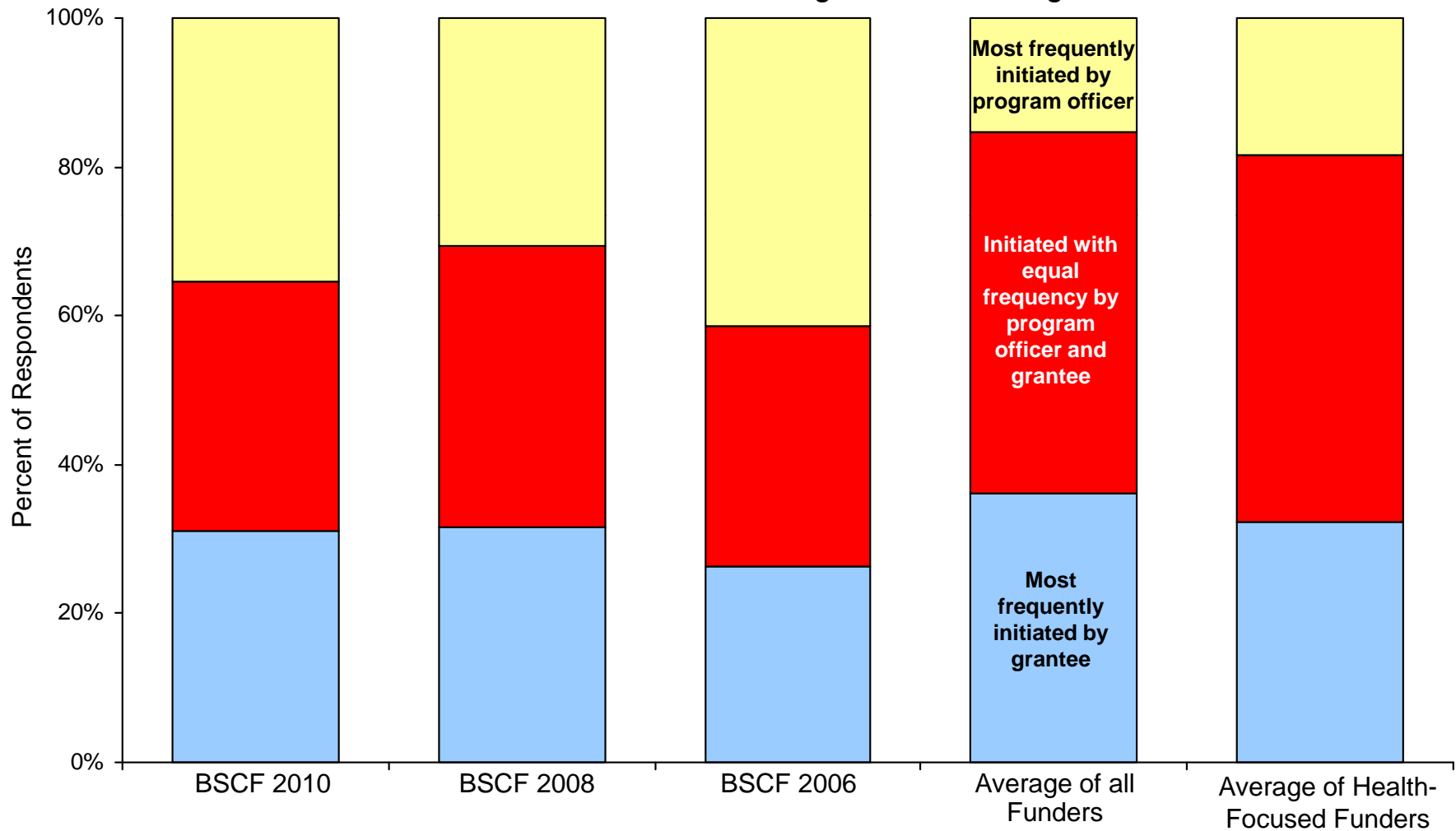


# Initiation of Interactions

The proportion of BSCF grantees that report that their program officer most frequently initiates the interactions they have with the Foundation is:

- larger than that of the average funder
- larger than that of the average health-focused funder

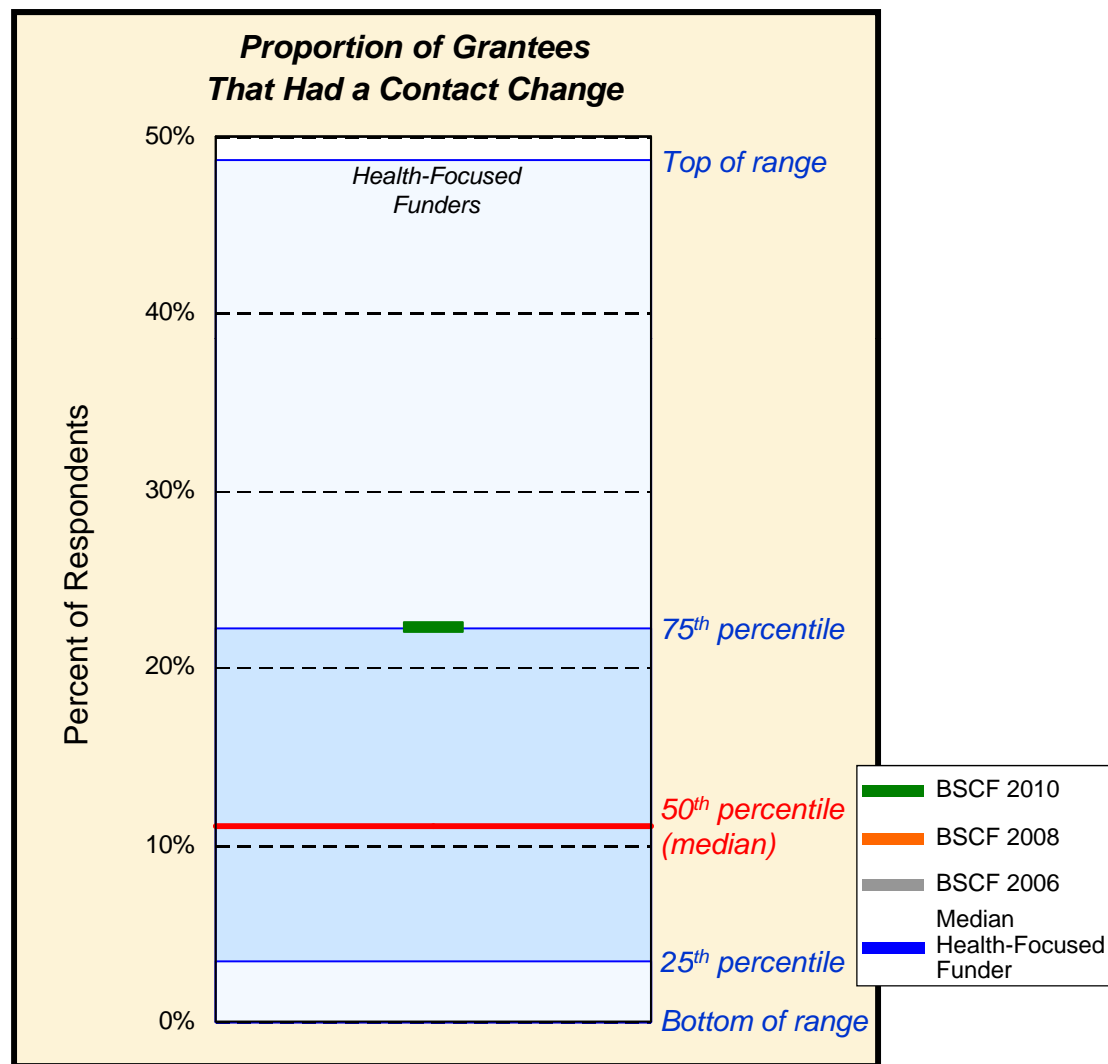
**Initiation of Grantee Contact with Program Officer During Grant**



# Proportion of Grantees That Had a Change in Primary Contact

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

- larger than that of the median funder

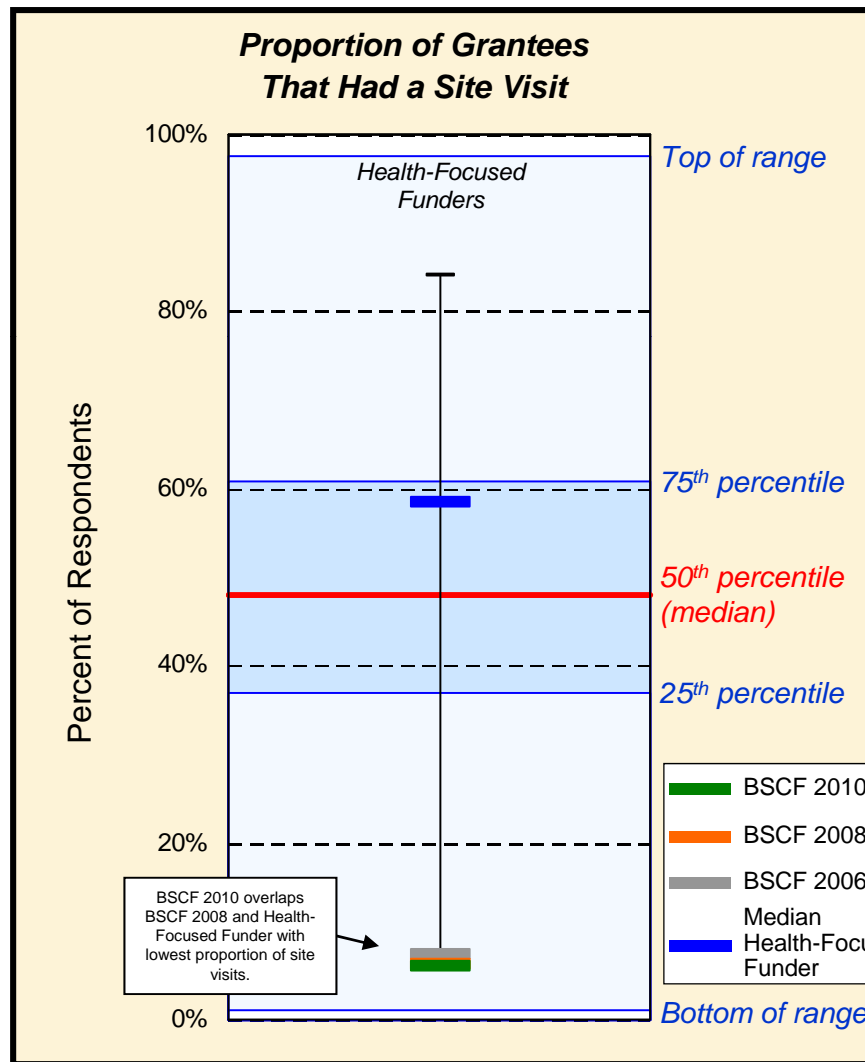


Note: Represents data from 65 funders. BSCF 2008 data, BSCF 2006 data, and health-focused funder data not available due to changes to the survey instrument.

# Proportion of Grantees That Had a Site Visit

The proportion of BSCF grantees receiving a site visit is:

- smaller than that of ninety percent of funders
- smaller than that of all other health-focused funders



## BSCF Analysis – Variation by Site Visit

BSCF grantees rate the Foundation differently based on whether or not they received a site visit during the life of the grant.

Grantees who received a site visit rate the Foundation significantly higher than those who did not on:

- ♦ Advancing knowledge in the field
- ♦ Impact on grantees' organizations
- ♦ Understanding of grantees' organizations
- ♦ Satisfaction
- ♦ Strength of relationship with the Foundation
- ♦ Helpfulness of the reporting/evaluation process
- ♦ Responsiveness

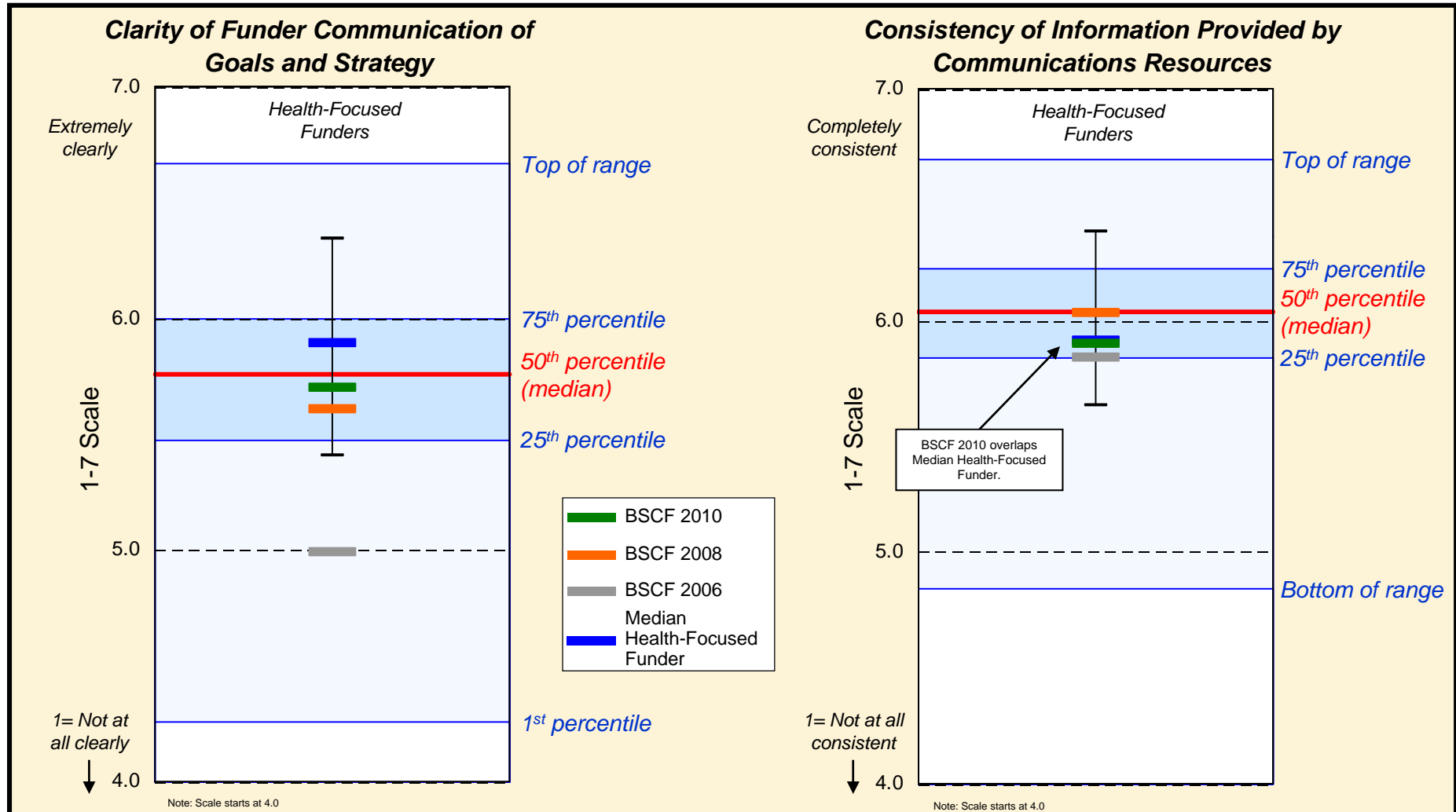
# Communications Measures

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

- similarly to the median funder
- below the median health-focused funder

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

- below the median funder
- similarly to the median health-focused funder



Note: In the left-hand chart, data is not shown from one funder whose clarity of communication rating is less than 4.0. In the right-hand chart, this question includes a "used one or no resources" response option; 4 percent of BSCF 2010 respondents indicated they had used one or no resources, compared to 5 percent at the median funder, 7 percent of BSCF 2008 respondents, 13 percent of BSCF 2006 respondents, and 3 percent of respondents at the median health-focused funder.

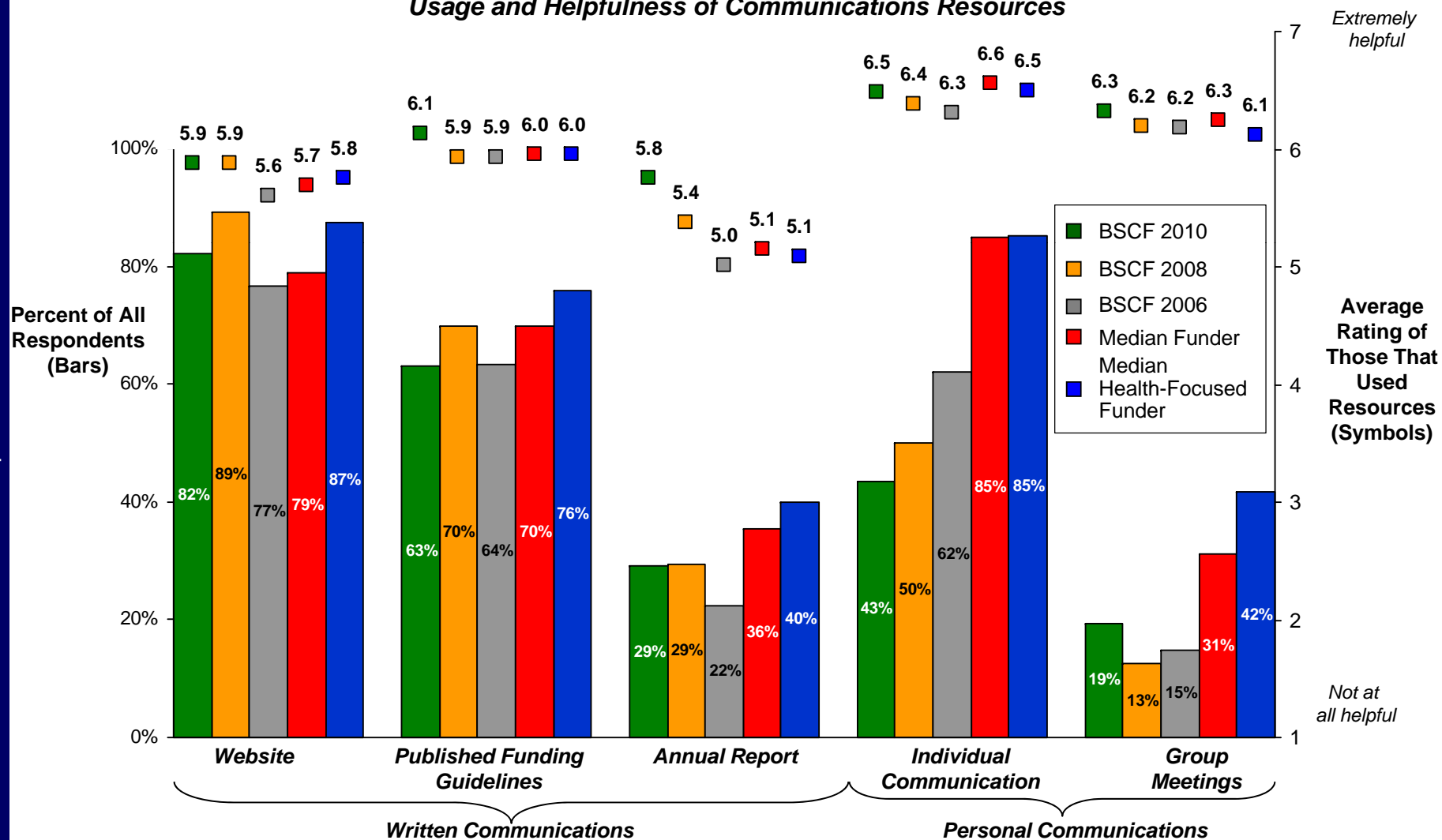
## Selected Grantee Comments

- ♦ *“Guidelines and all written communications were concise, easy to understand. There was no oral communications, no phone calls or initiation of communication outside regular mass communications.”*
- ♦ *“I appreciate communication via electronic means, as well as the cyber application. It saves time and is much more efficient.”*
- ♦ *“Frequent e-blasts from the Foundation are helpful. Since the Foundation supports past grantees, we make sure to keep up with the Foundation’s information by reading all available information. We particularly like the staff updates.”*
- ♦ *“[We’d like] more communications as to future strategies of the Foundation. Possibly a face-to-face leaning conference/meeting.”*
- ♦ *“This was a new BSAV funding initiative so the development process was somewhat bumpy. There was difficulty in understanding what the Foundations’ priorities were. That said, the Foundation conducted significant due diligence both with regard to the goals of the funding and the grantees...which they had never funded before.”*

# Communications Resources

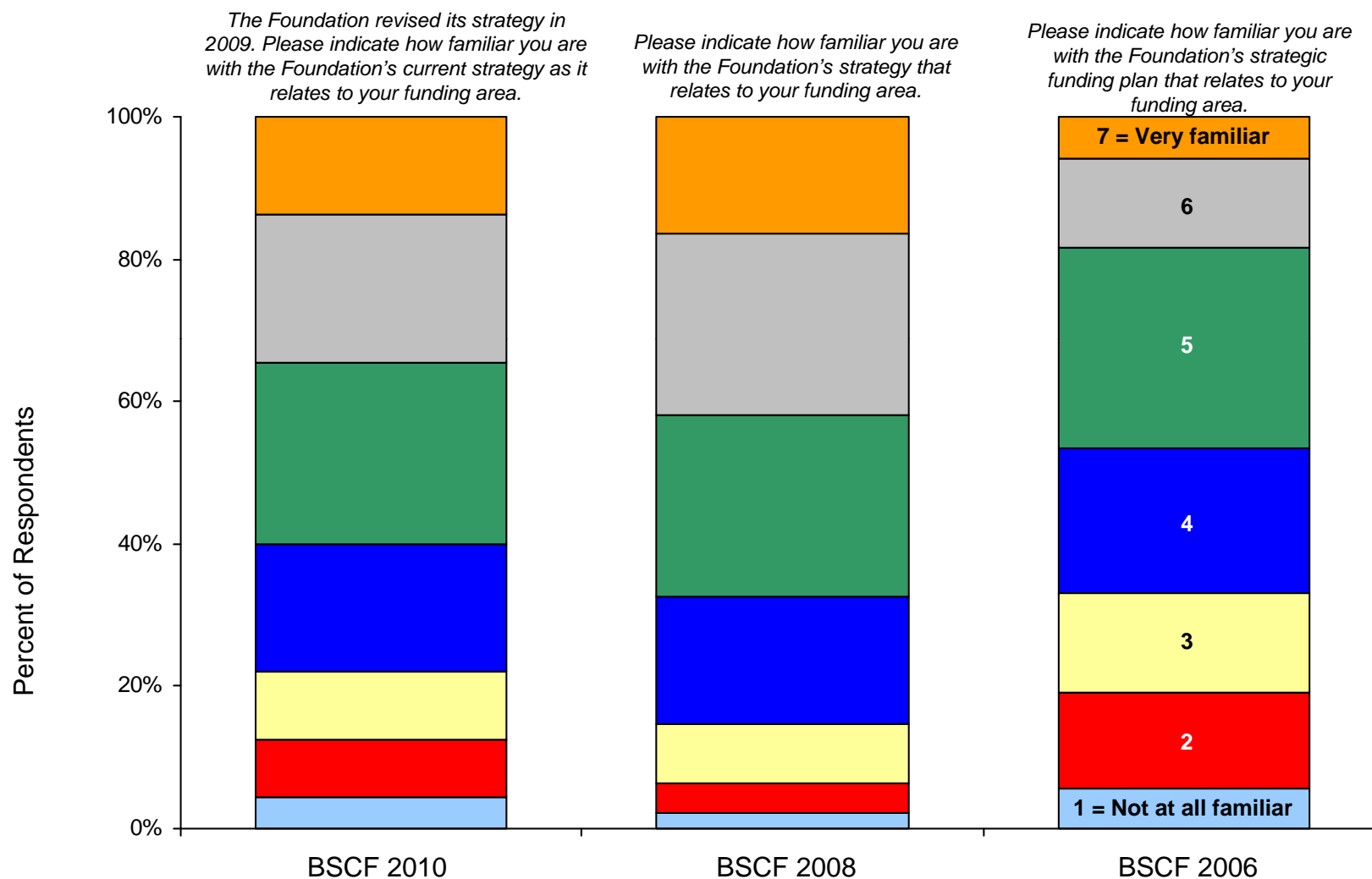
Compared to the median philanthropic funder, a typical proportion of BSCF grantees report using the Foundation's website to learn about the Foundation. A smaller than typical proportion report using individual communication to learn about the Foundation.

*Usage and Helpfulness of Communications Resources*



# Familiarity with Strategy

BSCF grantees were asked to indicate how familiar they are with the Foundation’s current strategy as it relates to their funding area, with 1 = “Not at all familiar” and 7 = “Very familiar.” On average, BSCF 2010 grantees rated a 4.7.



BSCF Average Rating	4.7	5.0	4.1
Percent of Respondents that Answered “Don’t know”	1%	0%	3%

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

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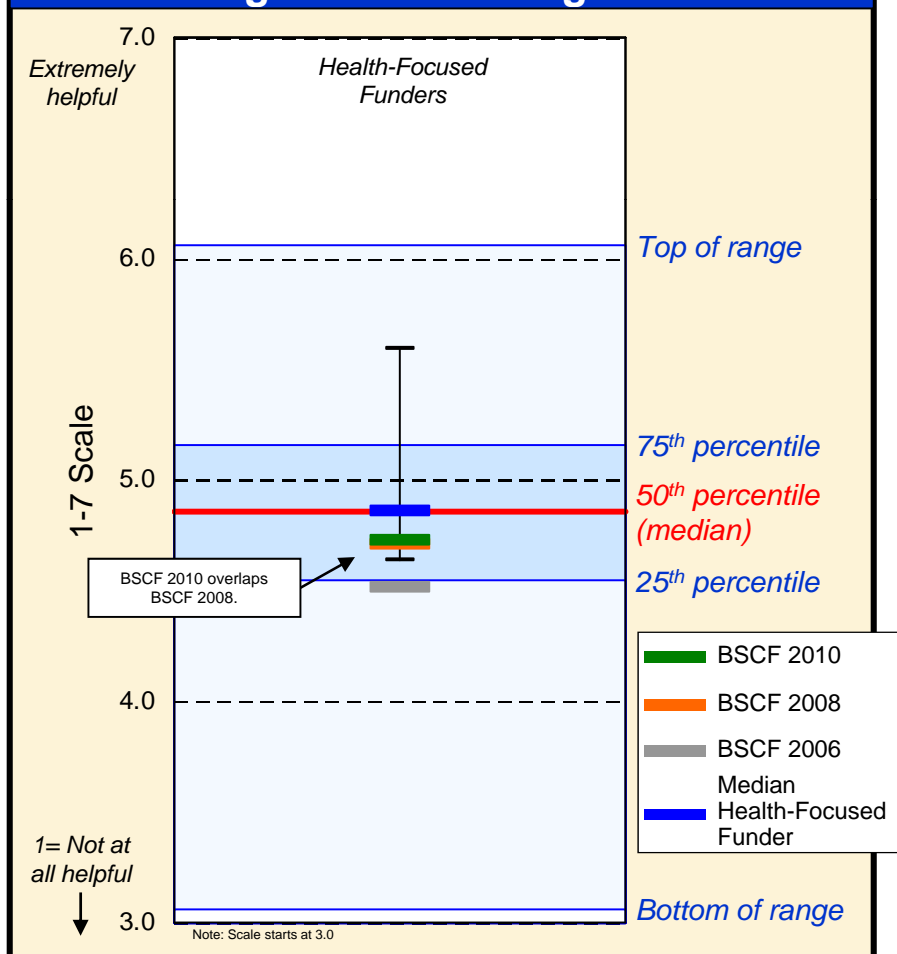


# Helpfulness of Selection Process

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

- similarly to the median funder
- similarly to the median health-focused funder

## Helpfulness of the Selection Process to Organizations/Programs



## Selected Grantee Comments

- ♦ “By far the easiest application and funding process of any of our funders.”
- ♦ “You hate to compare funders, but some just make the process insurmountable. Others make the process so easy that you wonder if they are throwing money at you without any thought. With Blue Shield you feel they are thoughtful, thorough and diligent throughout the process.”
- ♦ “This is the first time I used an online process like this and, I have to be honest, it was the most intuitive and easiest process I have ever used. Congratulations on both a transparent and concise process.”
- ♦ “I really like the CyberGrants system and proposal/reporting processes. At times, needed modifications aren't made to CyberGrants to ensure that its content is relevant to specific grant proposals and/or reports.”

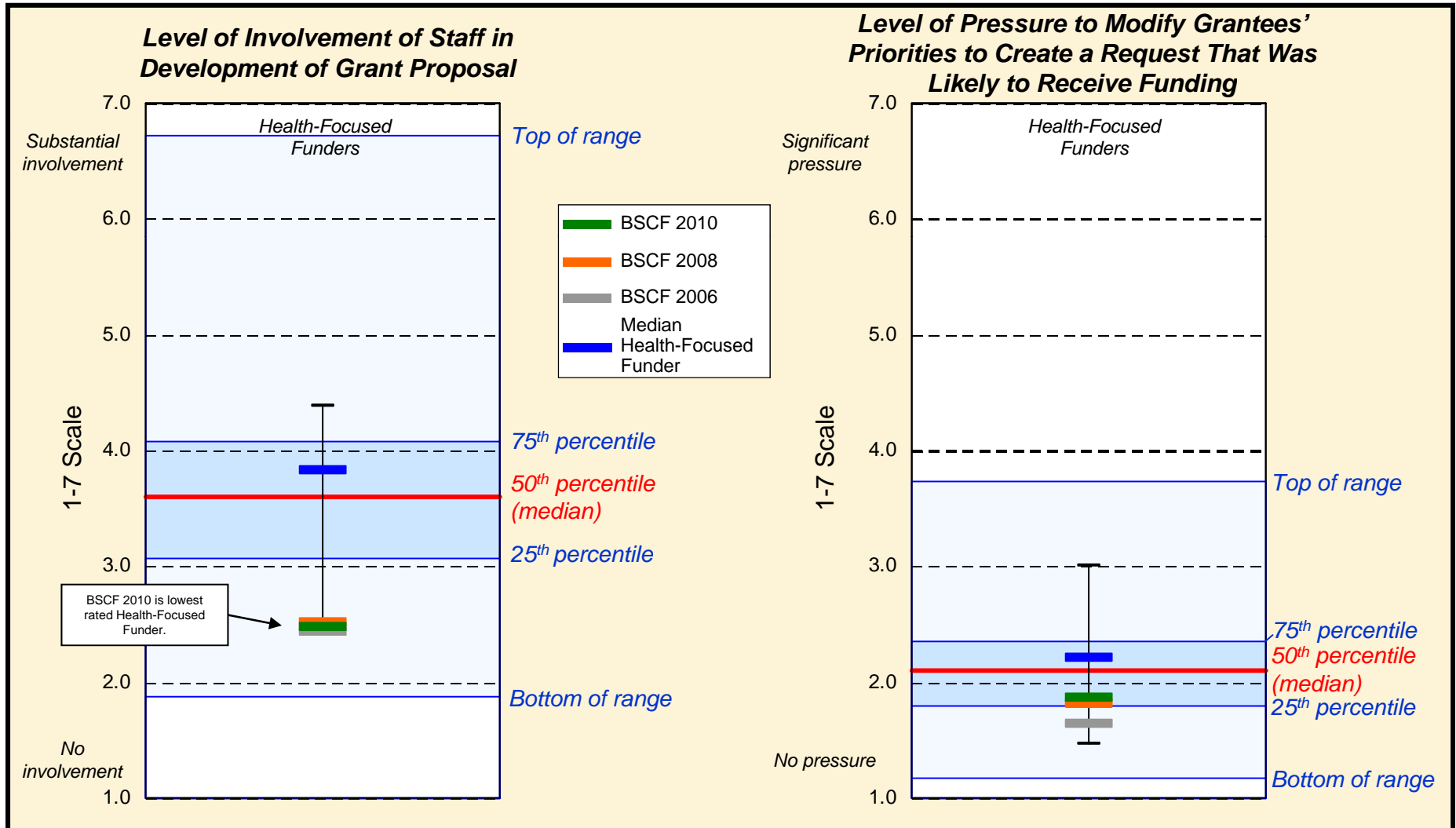
# Funder Involvement and Pressure in Selection Process

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

- lower than ninety percent of funders
- lower than all other health-focused funders

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

- below the median funder
- below the median health-focused funder

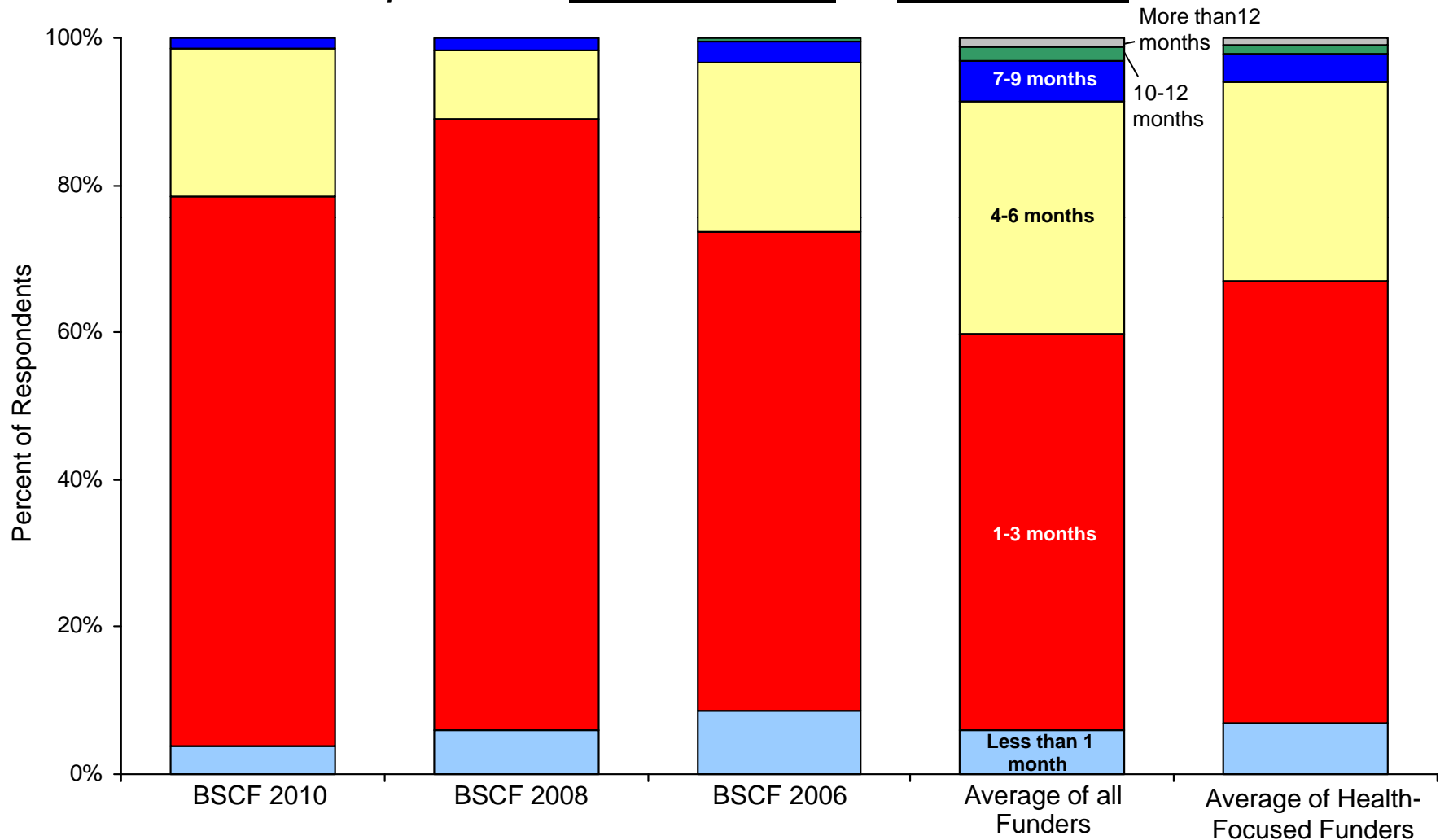


# Time Between Submission and Clear Commitment

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

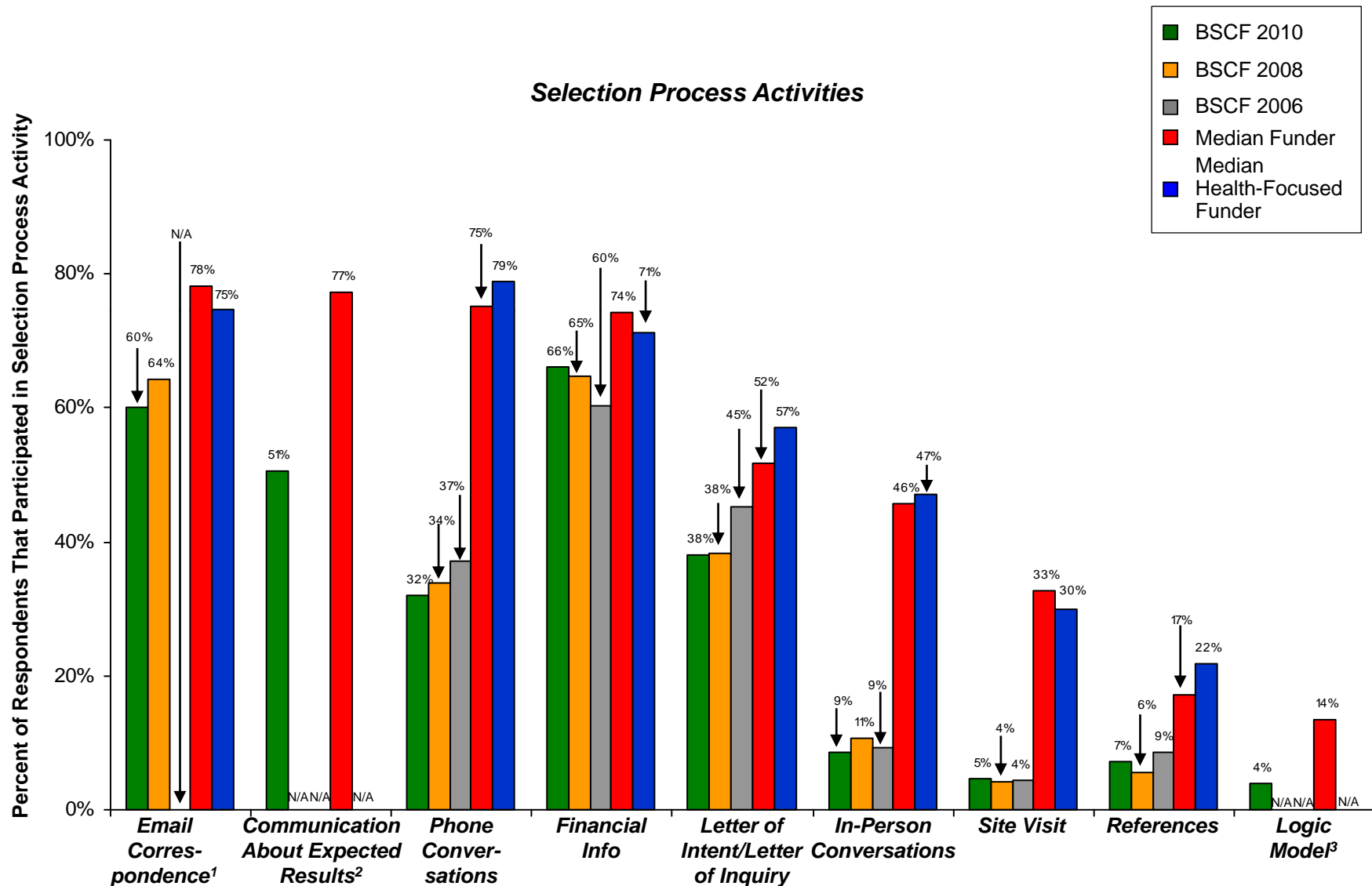
- smaller than that of the average funder
- smaller than that of the average health-focused funder

***Time Elapsed Between Proposal Submission and Clear Commitment***



# Selection Process Activities

Compared to grantees of the median philanthropic funder, BSCF grantees less frequently report engaging each of the below activities as part of the selection process.



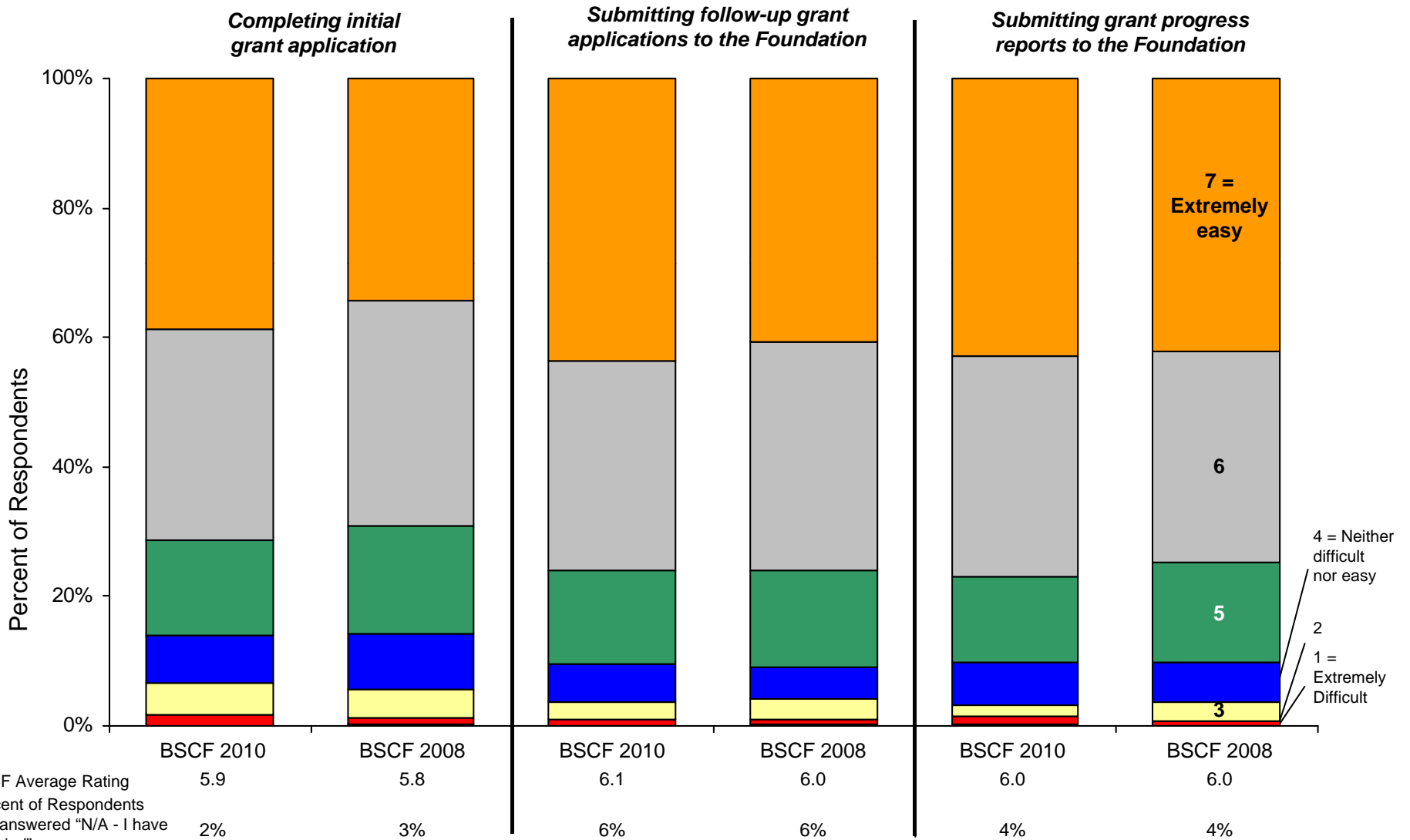
1: BSCF 2006 data not available due to changes in the survey instrument.

2: Represents data from 59 funders. BSCF 2008, BSCF 2006, health-focused funder data not available due to changes in the survey instrument.

3: Represents data from 45 funders. BSCF 2008, BSCF 2006, health-focused funder data not available due to changes in the survey instrument.

# Ease of CyberGrants Use

BSCF grantees were asked to rate the degree of ease or difficulty of completing several tasks through CyberGrants, with 1 = “Extremely difficult,” 4 = “Neither difficult nor easy,” and 7 = “Extremely easy.” On average, grantees find each of these stages in the CyberGrants process to be similarly easy.

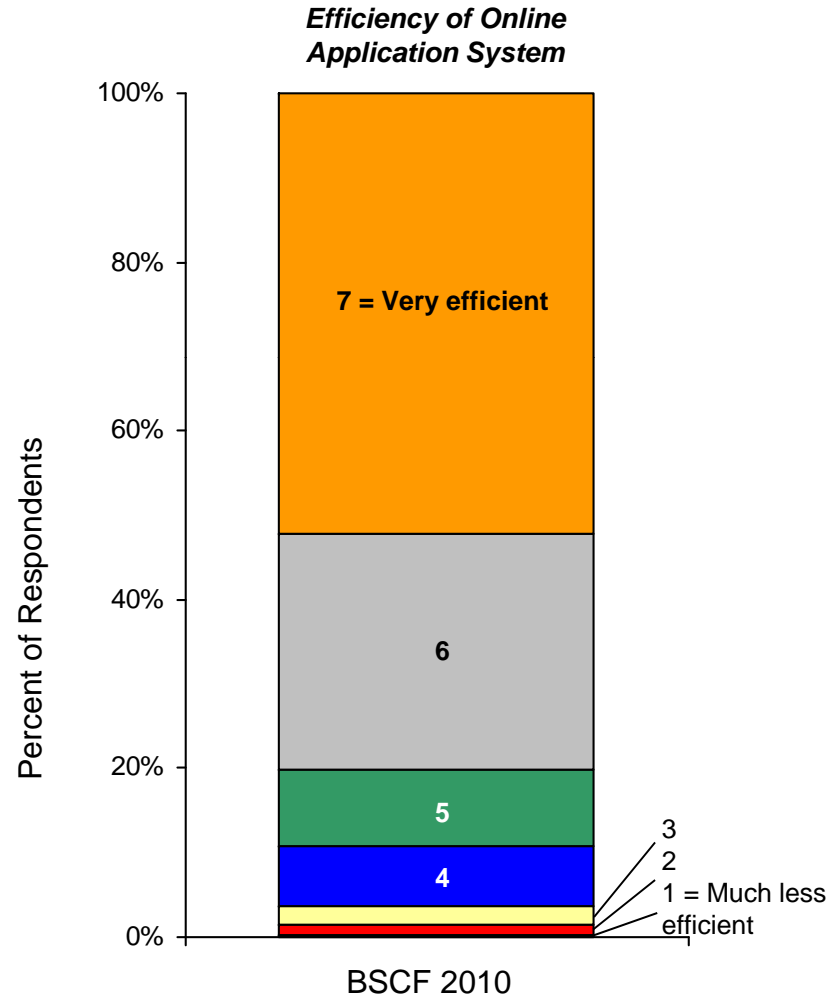


BSCF Average Rating	5.9	5.8
Percent of Respondents that answered "N/A - I have not tried"	2%	3%

Note: No comparative data is available because these questions were only asked of BSCF grantees. These questions had a “N/A – I have not used CyberGrants option.” Two percent of BSCF 2010 grantees and three percent of BSCF 2008 grantees reported that they had not used CyberGrants.

# Efficiency of Online System

BSCF grantees were asked to indicate how efficient they found the application system at BSCF, with 1 = “Much less efficient” and 7 = “Very efficient.” On average, BSCF 2010 grantees rated a 6.2.

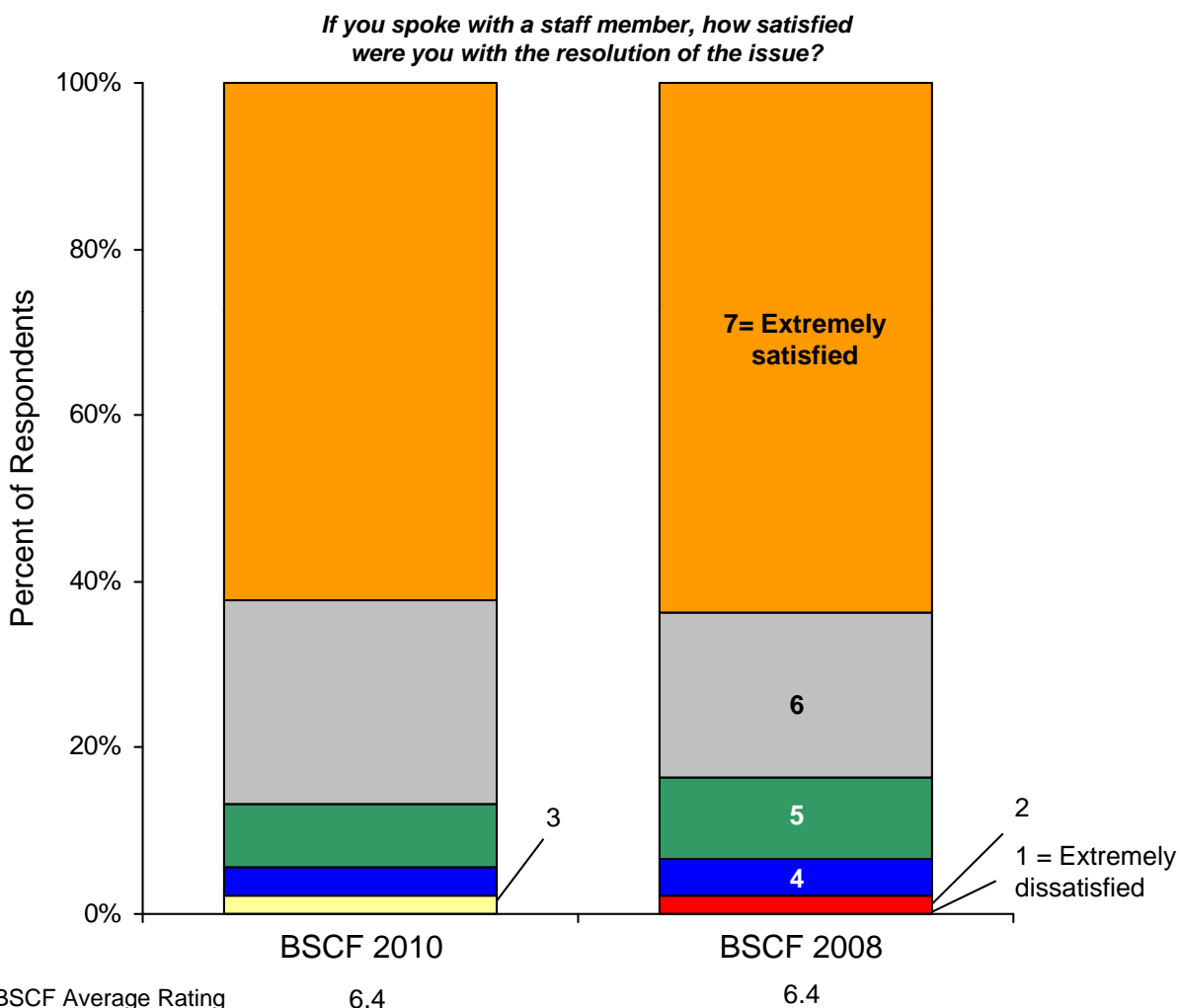


BSCF Average Rating	6.2
Percent of Respondents that Answered "N/A - I have not used online system"	2%

# Problems with Online System

BSCF grantees were asked if they had experienced a need to talk to Foundation staff about an issue they had had with CyberGrants. Thirty-one percent of BSCF 2010 grantees and 39 percent of BSCF 2008 grantees reported that they had experienced such a need. Grantees who spoke with someone were asked to describe their satisfaction with the resolution of the issue, with 1 = “Extremely dissatisfied” and 7 = “Extremely satisfied.” On average, BSCF grantees rated a 6.4.

If you needed to talk to Foundation staff regarding CyberGrants, did you attempt to contact the Foundation to discuss your issue?		
	BSCF 2010	BSCF 2008 <sup>1</sup>
Yes, spoke to someone	95%	95%
Yes, but didn't speak with someone	5%	5%
No, didn't know who to contact	0%	1%
No, didn't try even though knew who to contact	0%	0%



1: Numbers do not sum to 100 percent due to rounding.

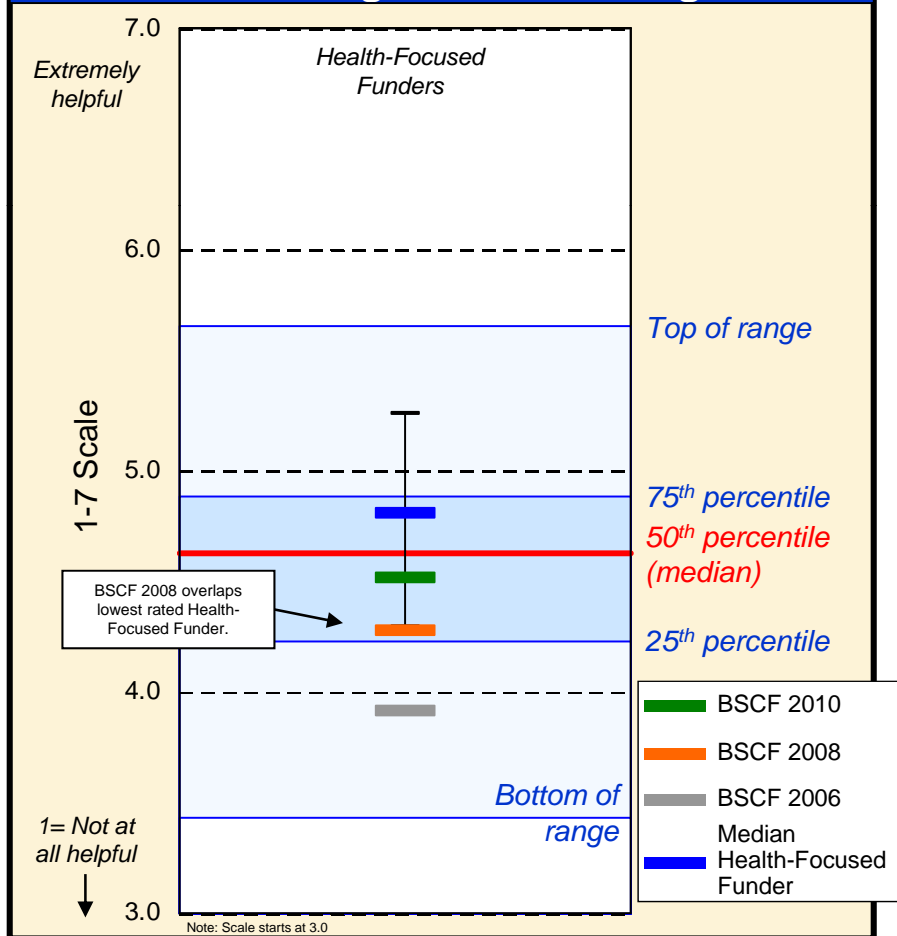
Note: BSCF 2006, median health-focused funder, and median funder data are not available because the question was only asked of BSCF 2010 and BSCF 2008 grantees.

# Helpfulness of Reporting and Evaluation Processes

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

- similarly to the median funder
- below the median health-focused funder

## Helpfulness of Reporting/Evaluation Process to Organizations/Programs



## Selected Grantee Comments

- *“Over the course of 3 years, we have had absolutely no feedback on any reports submitted to the Foundation. Our grant relates to Medical Technology, which is no longer of interest to the Foundation. Our project officer is a consultant and we never hear from her.”*
- *“The reporting burden is getting to be a bit much. Would like it to go back to the good old days. [Our current award] should require no more than a two page report.”*
- *“The grant application process was easy and fairly generic, however the reports are much more targeted.”*
- *“We...have not received any significant feedback on the progress of the work (positive or negative).”*

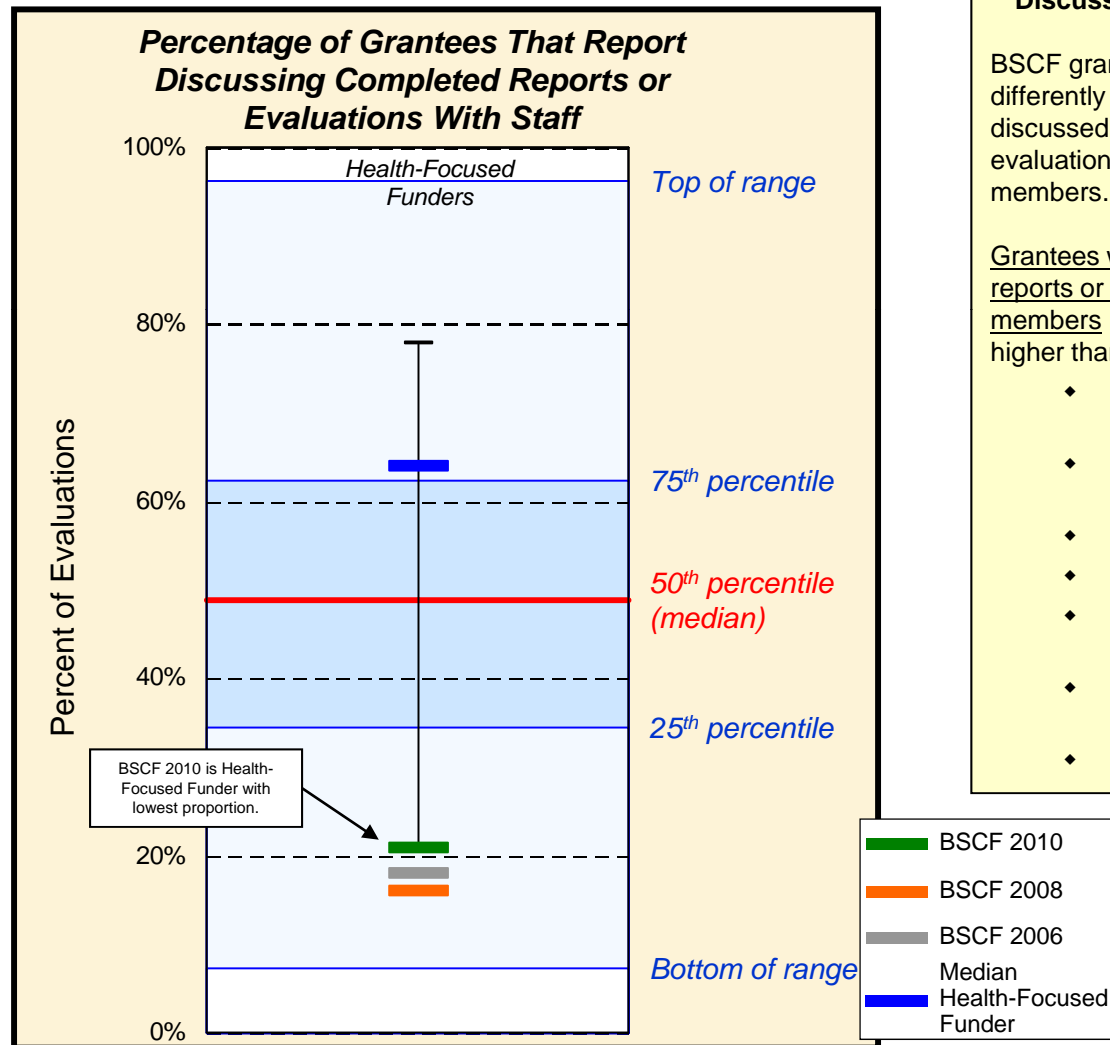
Note: This question was only asked of those grantees that had participated in a reporting or evaluation process by the time they took the survey. For BSCF 2010, 53 percent of grantees indicated that they had participated in a reporting or evaluation process by the time they took the survey, compared to 61 percent at the median funder, 55 percent of BSCF 2008 respondents, 83 percent of BSCF 2006 respondents, and 67 percent of respondents at the median health-focused funder.



# Reporting and Evaluation Processes

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

- smaller than that of ninety percent of funders
- smaller than that of all other health-focused funders



**BSCF Analysis – Variation By Discussion of Completed Reports or Evaluations**

BSCF grantees rate the Foundation differently based on whether or not they discussed their completed reports or evaluations with Foundation staff members.

Grantees who discussed their completed reports or evaluations with Foundation staff members rate the Foundation significantly higher than do other grantees on:

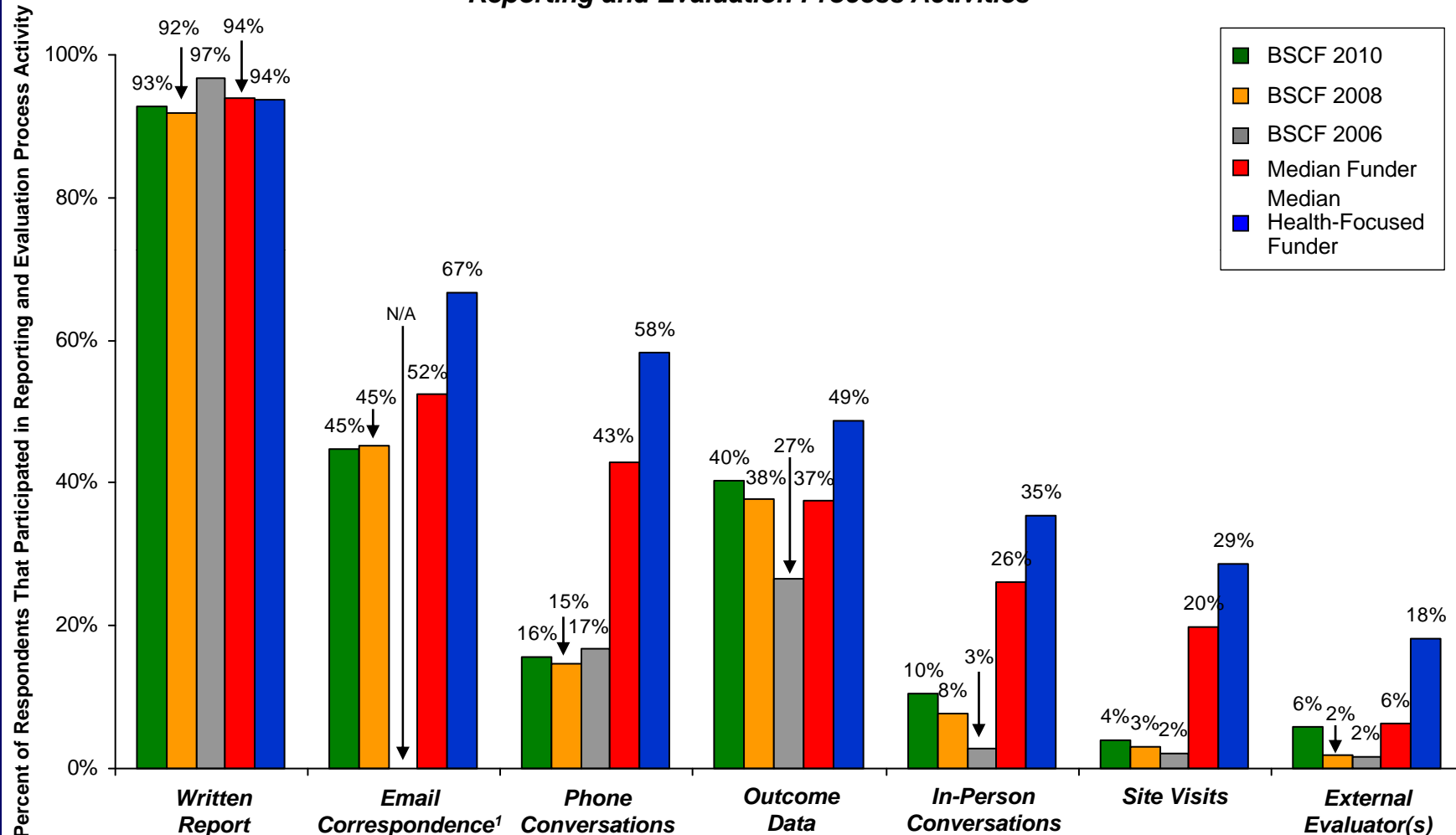
- ♦ Helpfulness of the evaluation process
- ♦ Helpfulness of the selection process
- ♦ Impact on grantees’ fields
- ♦ Advancing knowledge in the field
- ♦ Understanding of grantee organizations
- ♦ Strength of relationships with grantees
- ♦ Responsiveness

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 BSCF 2010, 53 percent of grantees indicated that they had participated in a reporting or evaluation process by the time they took the survey, compared to 61 percent at the median funder, 55 percent of BSCF 2008 respondents, 83 percent of BSCF 2006 respondents, and 67 percent of respondents at the median health-focused funder.

# Reporting and Evaluation Process Activities

BSCF grantees less frequently report engaging in phone and in-person conversations with Foundation staff than is typical.

Reporting and Evaluation Process Activities



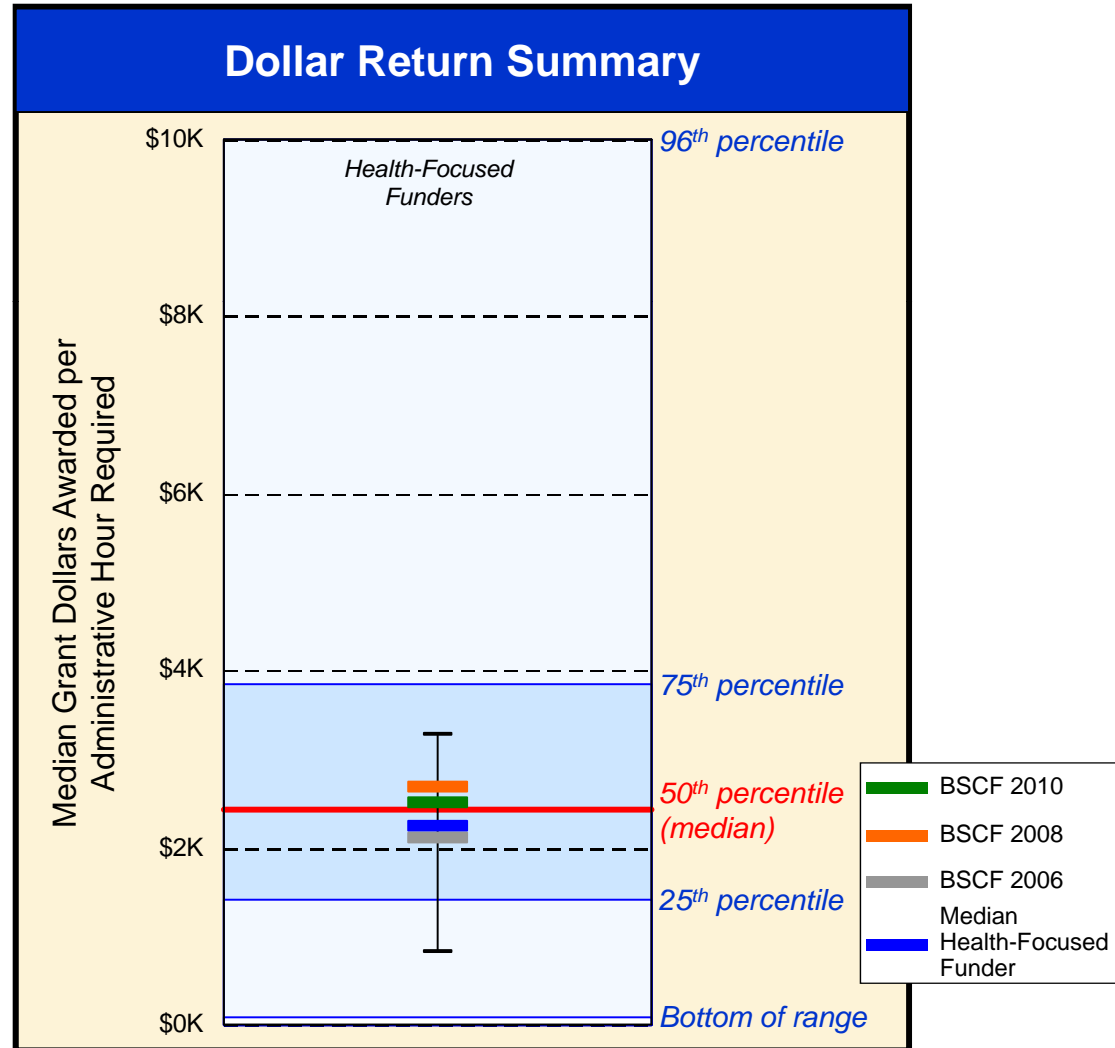
1: BSCF 2006 data not available due to changes to the survey instrument.

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 BSCF 2010, 53 percent of grantees indicated that they had participated in a reporting or evaluation process by the time they took the survey, compared to 61 percent at the median funder, 55 percent of BSCF 2008 respondents, 83 percent of BSCF 2006 respondents, and 67 percent of respondents at the median health-focused funder.

# 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 BSCF grantees is:

- similar to that of the median funder
- greater than that of the median health-focused funder



Note: 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 eight funders whose Dollar Return on Grantee Administrative Hours exceeds \$10K.

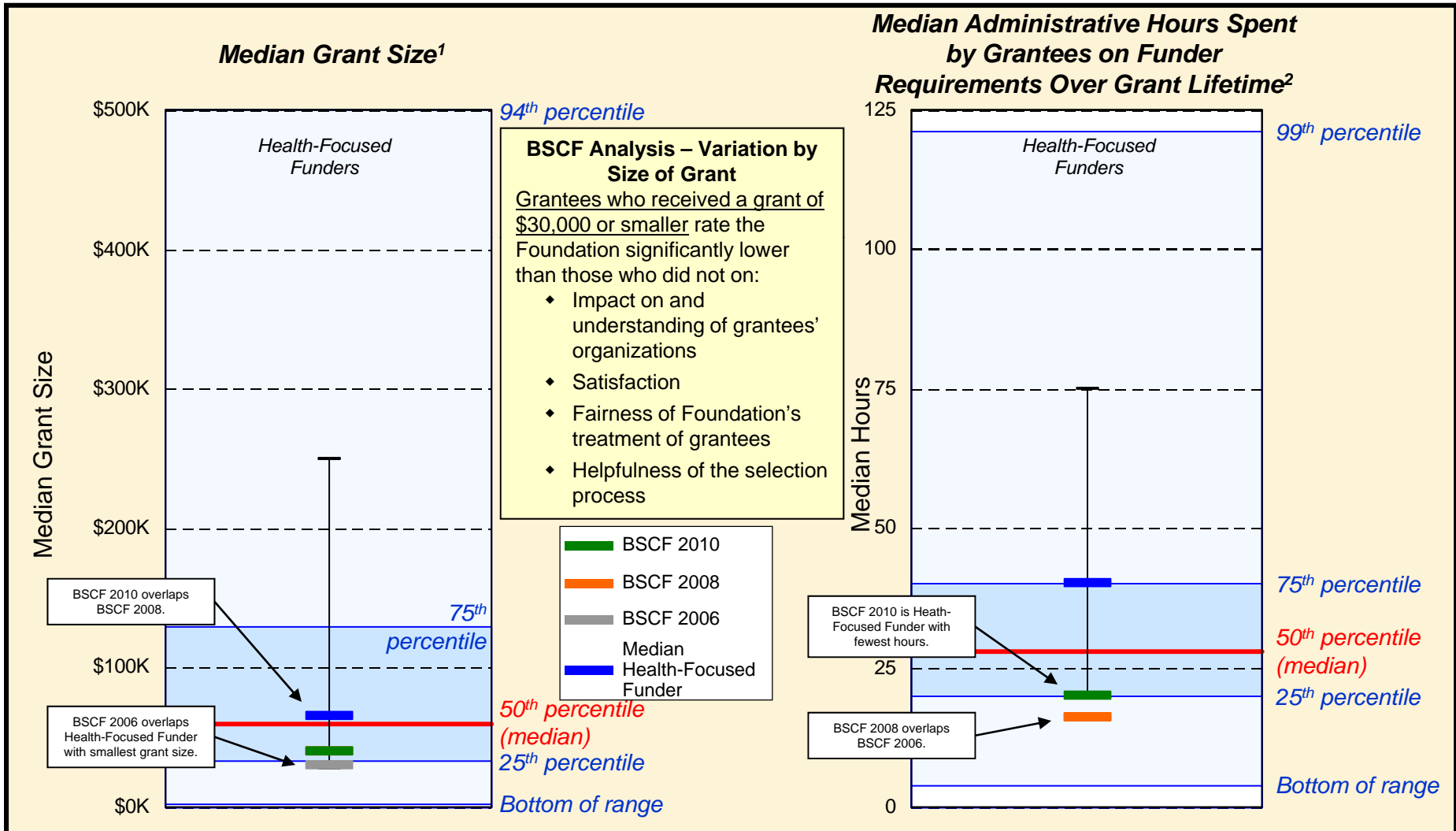
# Grant Size and Administrative Time

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

- smaller than that of the median funder
- smaller than that of the median health-focused funder

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

- less than the time spent by grantees of the median funder
- less than the time spent by grantees of all other health-focused funders



1: Chart does not show data from 12 funders whose median grant size exceeds \$500K.

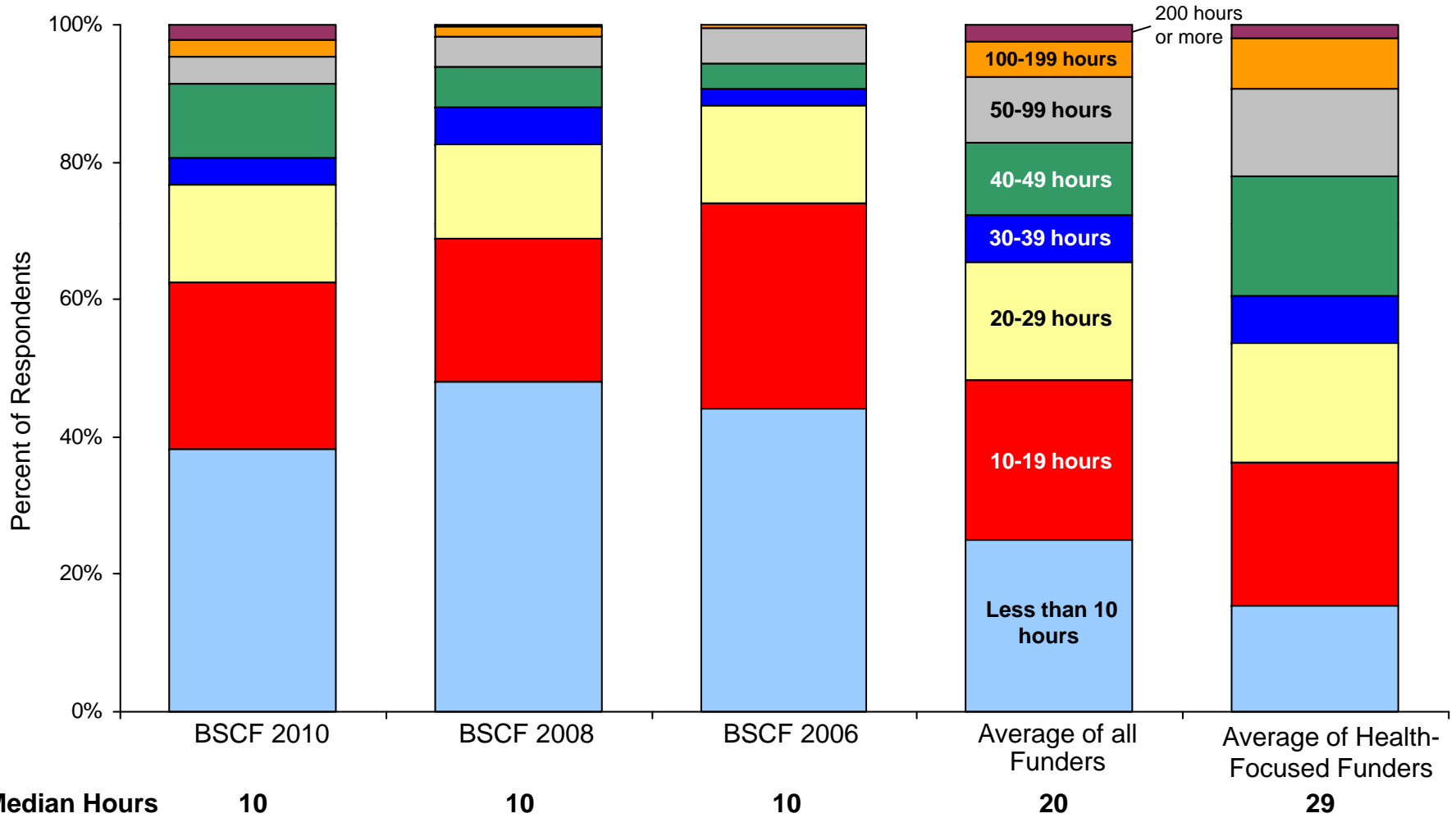
2: Chart displays total grant proposal creation, evaluation, and monitoring hours spent over the life of the grant; each of these events did not necessarily occur for each individual grantee. Chart does not show data from two funders whose median administrative hours exceeds 125 hours.

# Administrative Time – Proposal and Selection Process

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

- less than the time spent by grantees of the median funder
- less than the time spent by grantees of all other health-focused funders

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

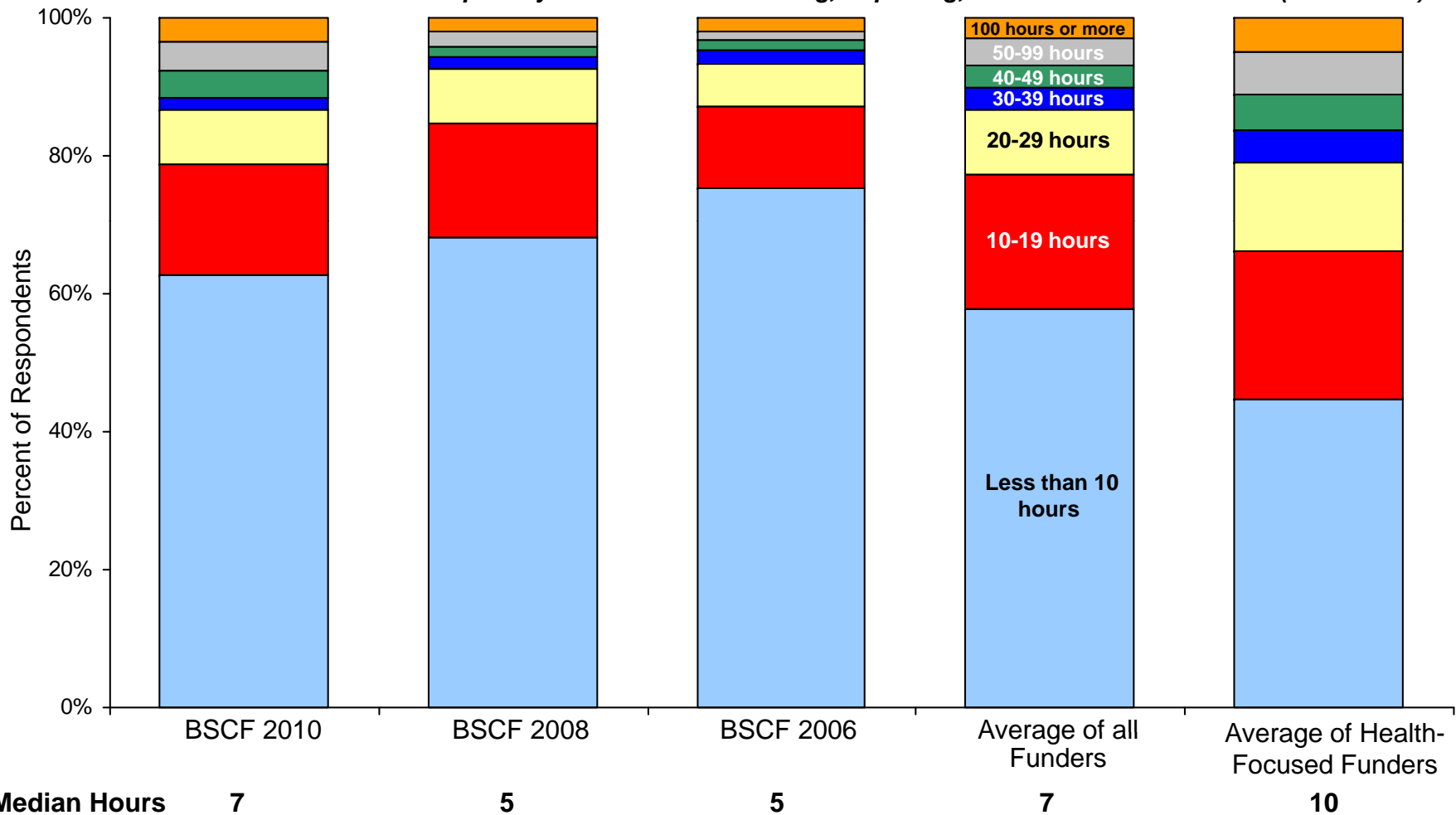


# Administrative Time – Reporting and Evaluation Processes

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

- similar to the time spent by grantees of the median funder
- less than the time spent by grantees of the median health-focused funder

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



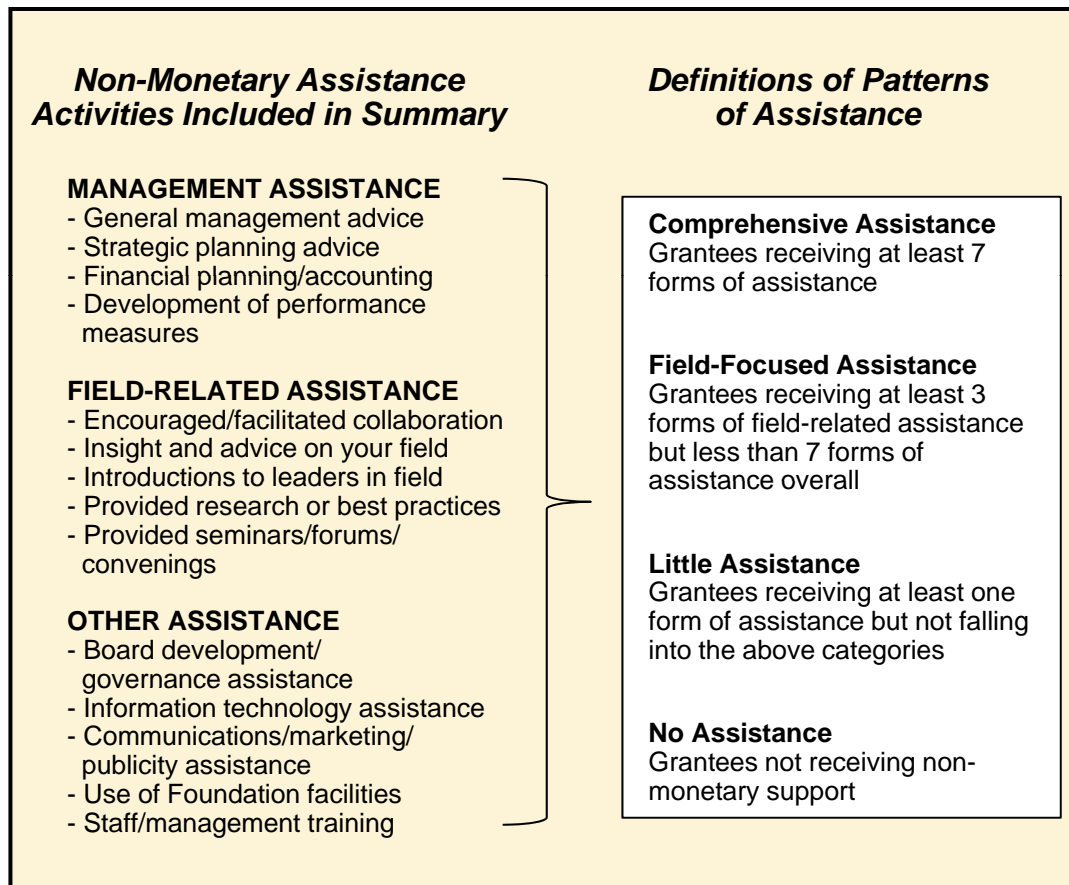
Note: "Evaluation" in the survey includes any activity considered by grantees to be part of an evaluation, and does not necessarily correspond to the Foundation's definition.

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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.



## Selected Grantee Comments

- ◆ *“We have benefited greatly from consulting services arranged through the Foundation.”*
- ◆ *“There are quite a few consultants and subcontractors that are part of the Foundation’s process and it is hard to tell who is responsible for what.”*
- ◆ *“Helped to fund essential trainings and programs that would have otherwise not had a funding stream. These programs have helped to position our organization as a leader in the community and ensure [our] financial strength.”*
- ◆ *“Extremely helpful in advancing...the field by supporting communication, networking, best practices and shared standards.”*

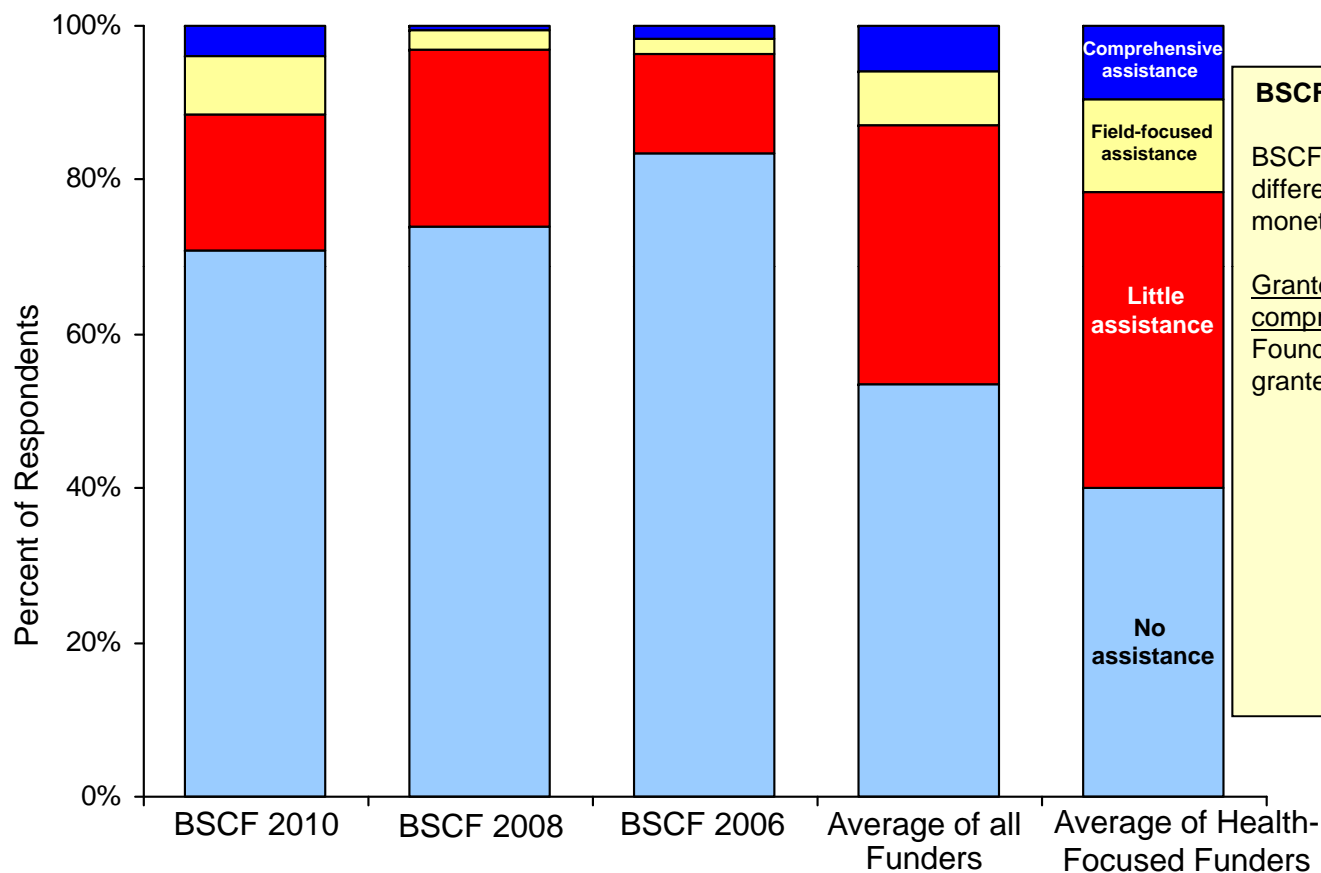


## Non-Monetary Assistance Summary (2)

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

- similar to that of the median funder
- smaller than that of the median health-focused funder

Non-Monetary Assistance Patterns



### BSCF Analysis – Variation by Pattern of Non-Monetary Assistance

BSCF grantees rate the Foundation differently based on the patterns of non-monetary assistance that they received.

Grantees who receive field-focused or comprehensive assistance rate the Foundation significantly higher than do grantees who received no assistance on:

- ◆ Impact on grantees' fields
- ◆ Advancing knowledge in the field
- ◆ Understanding of grantee organizations
- ◆ Satisfaction
- ◆ Strength of relationships with grantees
- ◆ Responsiveness

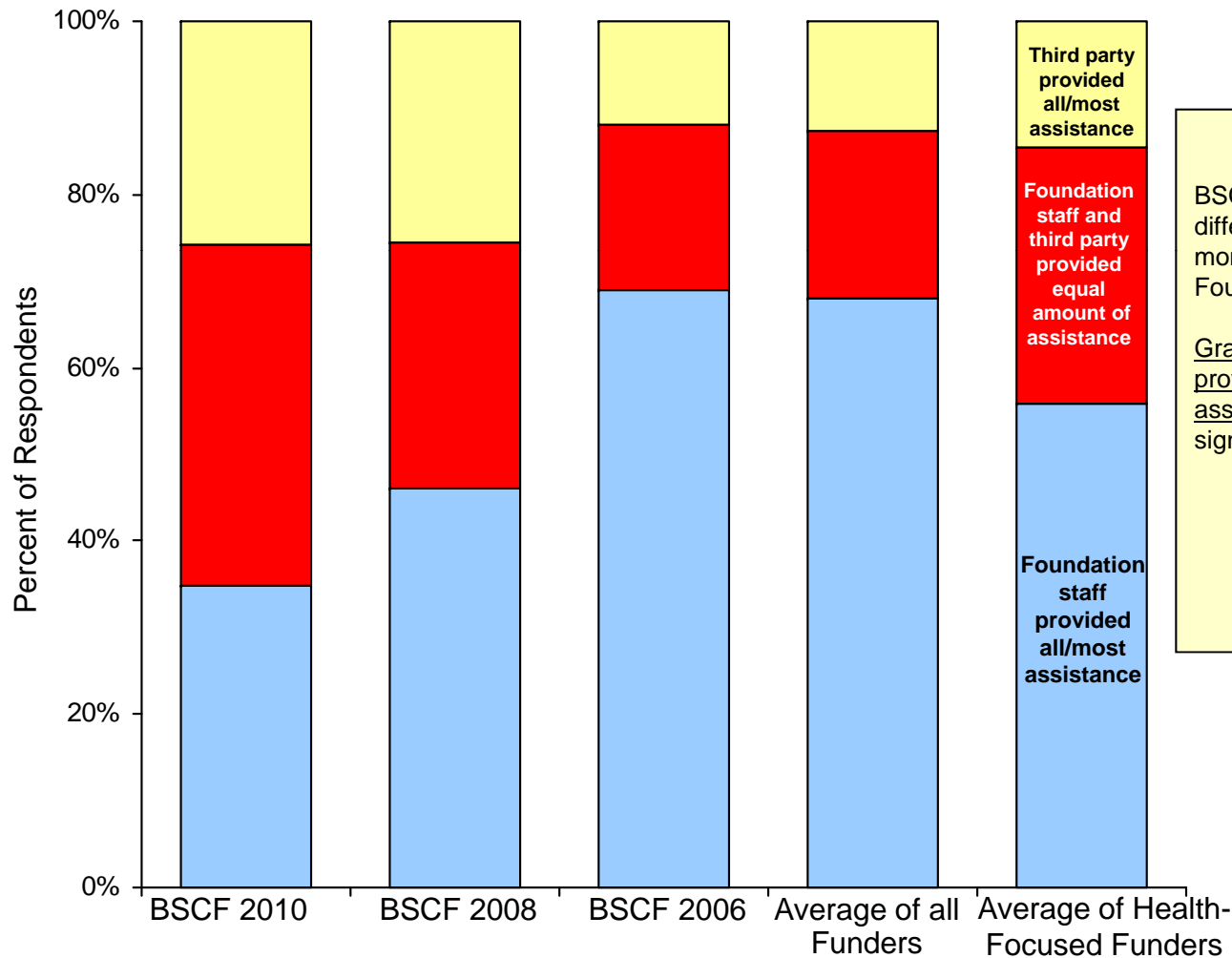
*Survey-Wide Analysis Fact:* Providing just two or three types of assistance appears to be ineffective; it is only in the minority of cases when grantees receive either a comprehensive set of assistance activities or a set of mainly field-focused types of assistance that they have a substantially more 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*.

# Who Provided Non-Monetary Assistance

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

- smaller than that of the average funder
- smaller than that of the average health-focused funder

**Who Provided Non-Monetary Assistance**



**BSCF Analysis – Variation by Who Provided Non-Monetary Assistance**

BSCF grantees rate the Foundation differently based on who provided the non-monetary assistance they received from the Foundation.

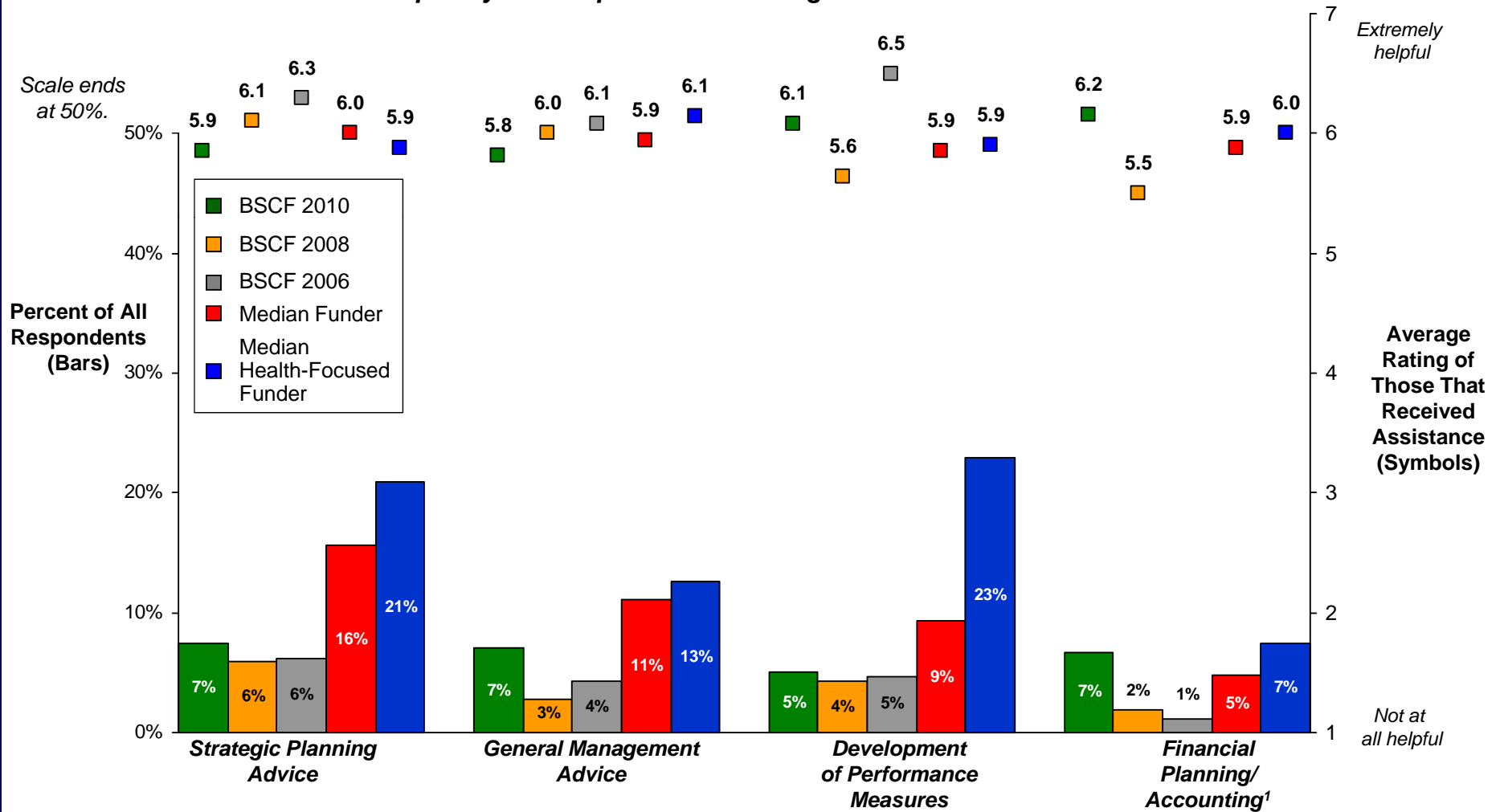
Grantees who report that a third party provided all or most of the non-monetary assistance they received rate the Foundation significantly lower than do other grantees on:

- ♦ Understanding of grantees' fields
- ♦ Advancing knowledge in the field
- ♦ Understanding of grantees' local communities
- ♦ Fairness of treatment of grantees

# Management Assistance Activities & Helpfulness

A smaller than typical proportion of BSCF grantees report receiving general management advice or strategic planning advice than grantees of other philanthropic funders.

*Frequency and Helpfulness of Management Assistance Activities*

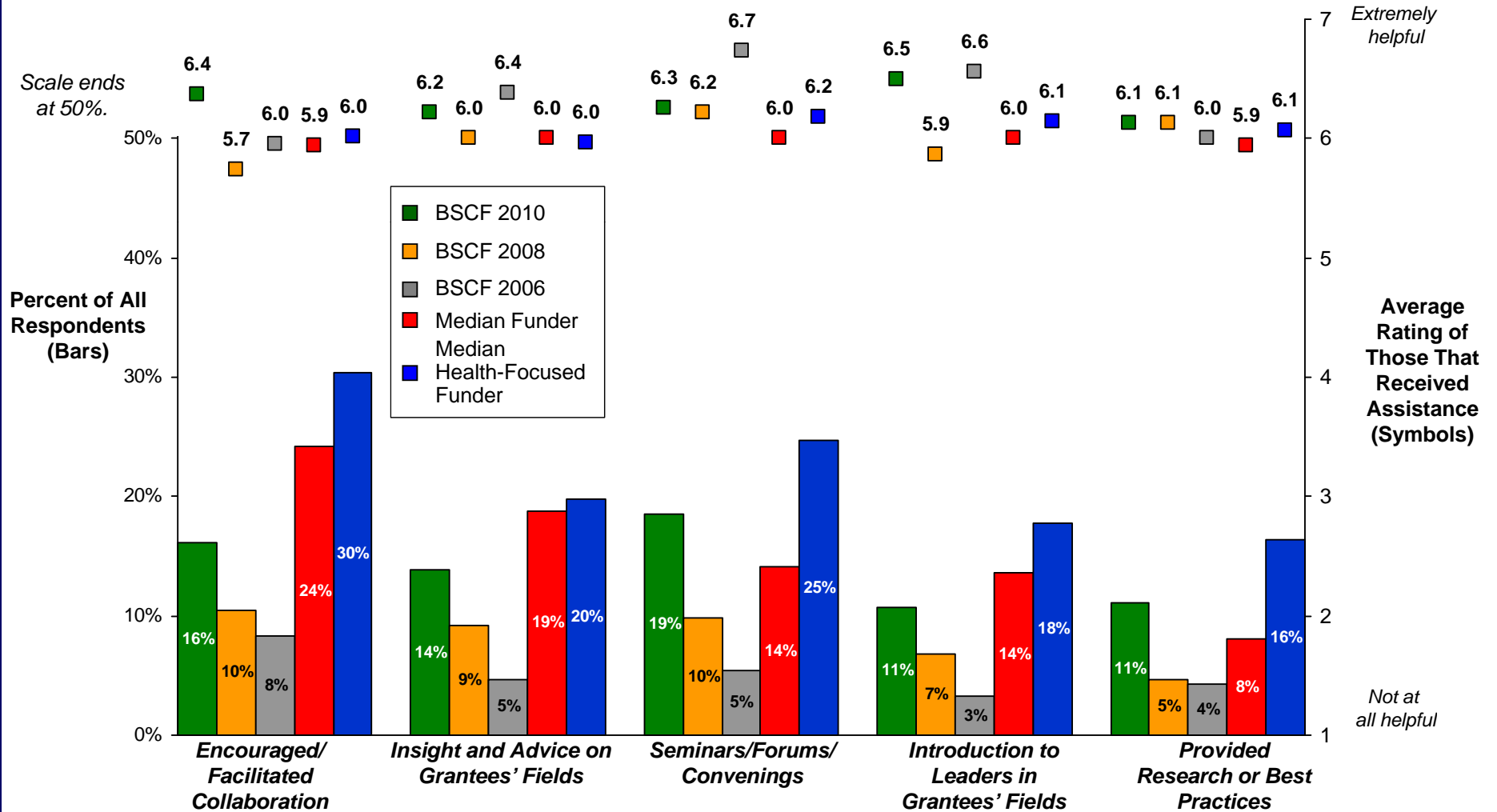


<sup>1</sup>: BSCF 2006 helpfulness rating not shown because fewer than five responses to the question were received.

# Field-Related Assistance Activities & Helpfulness

A larger than typical proportion of BSCF grantees report attending a seminar, forum, or convening. A smaller than typical proportion of BSCF grantees report receiving insight on their fields.

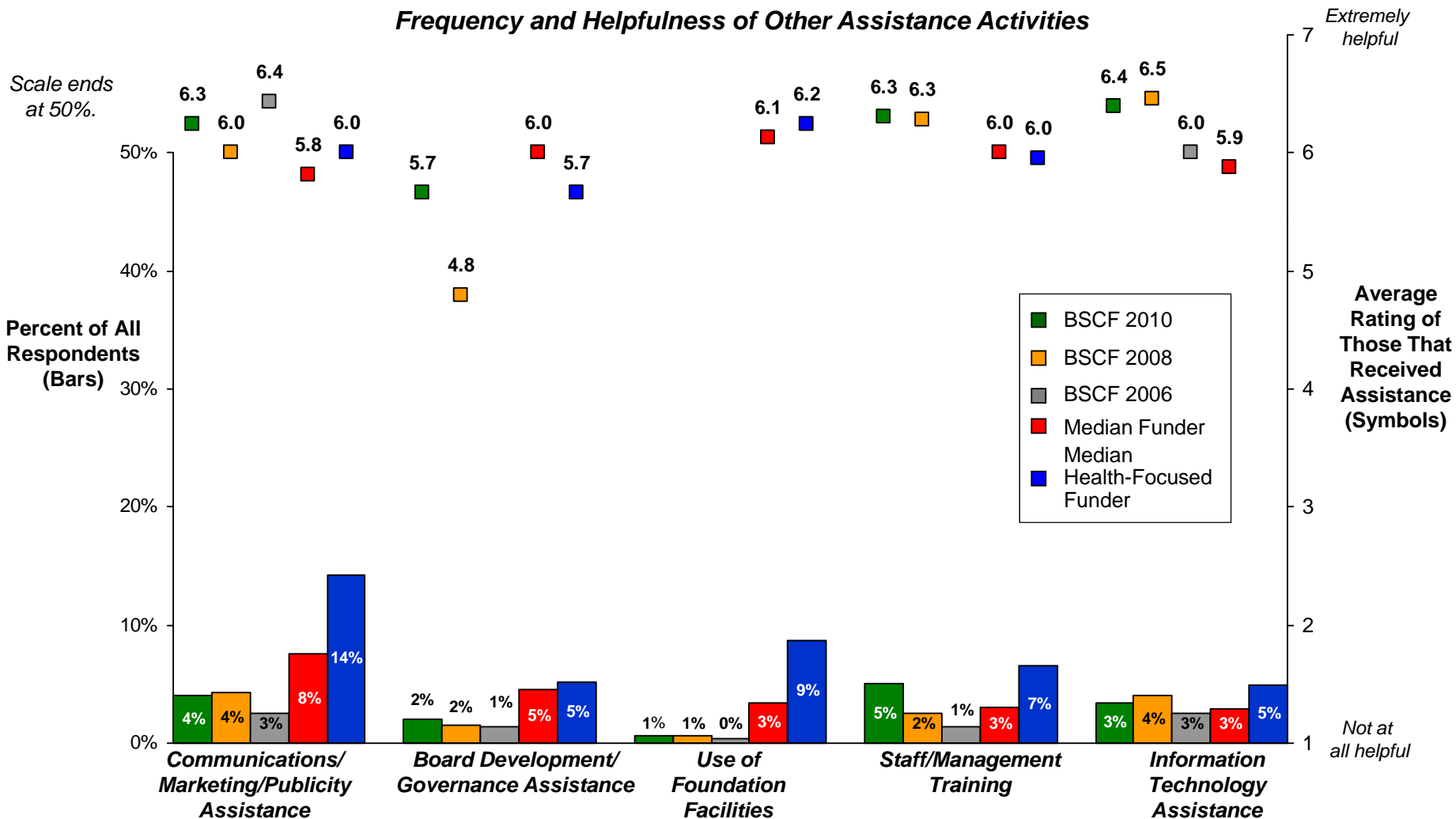
*Frequency and Helpfulness of Field-Related Assistance Activities*



# Other Support Activities & Helpfulness

A larger than typical proportion of BSCF grantees report receiving staff/management training. A smaller than typical proportion of BSCF grantees report receiving communications/marketing/publicity assistance.

Frequency and Helpfulness of Other Assistance Activities



Note: BSCF 2010, 2008, 2006 helpfulness ratings not shown when fewer than five responses to the question were received. Median health-focused funder helpfulness ratings not shown when fewer than 5 responses to the question were received from fewer than half the funders. © The Center for Effective Philanthropy | 5/17/2011

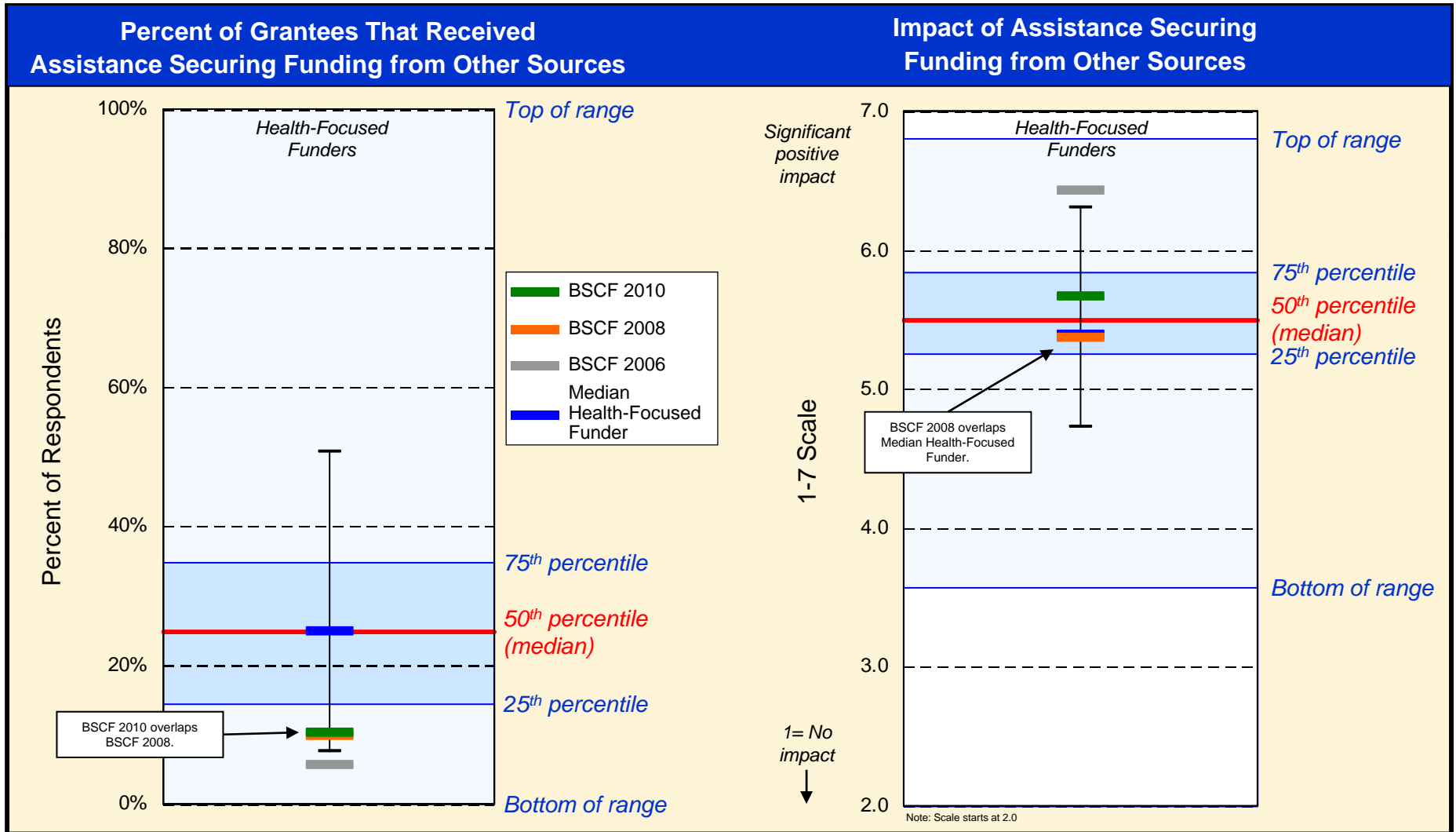
# Impact of Assistance Securing Funding from Other Sources

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

- smaller than that of the median funder
- smaller than that of the median health-focused funder

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

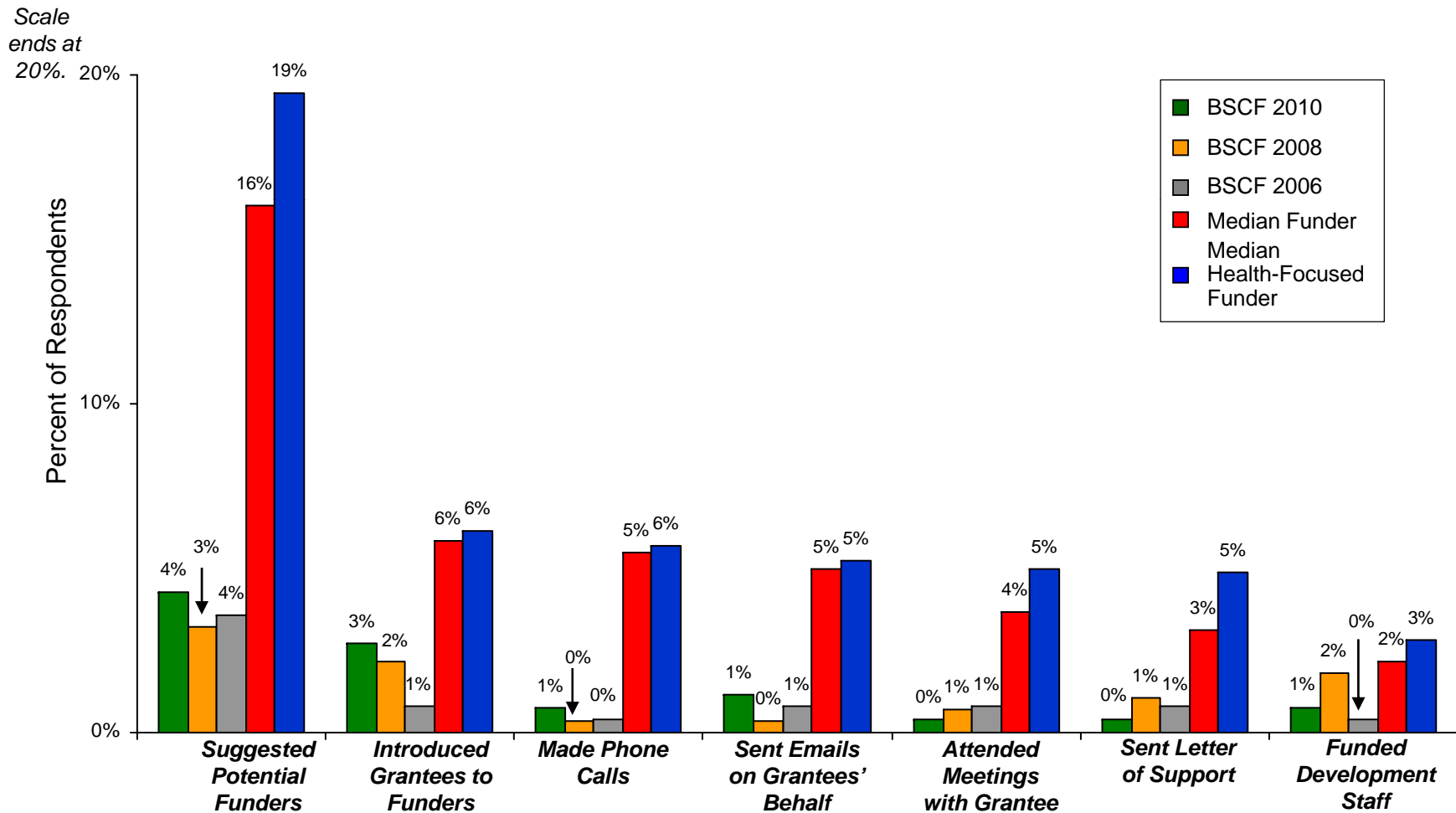
- above the median funder
- above the median health-focused funder



# Frequency of Assistance Securing Funding from Other Sources

A smaller than typical proportion of BSCF grantees report receiving each of the forms of assistance securing funding from other sources listed below.

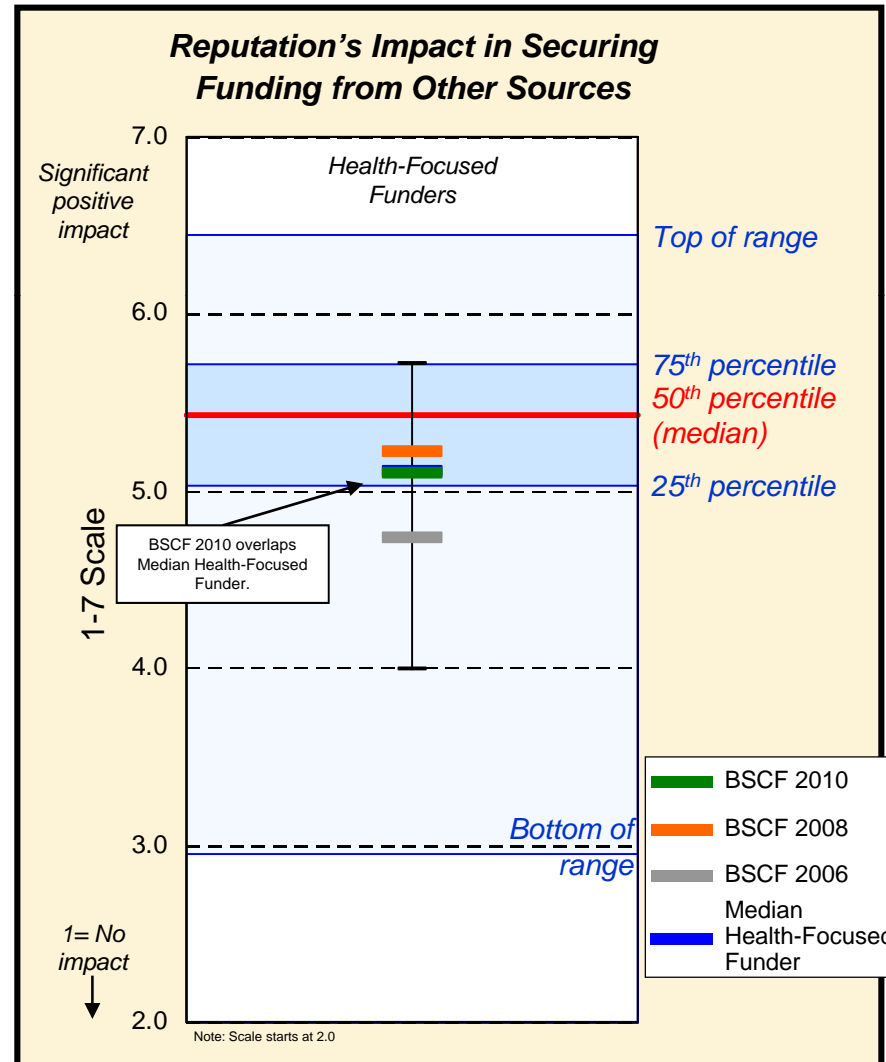
*Activities Provided by the Funder to Assist in Obtaining Funding From Other Sources*



# Impact of Reputation

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

- below the median funder
- similarly to the median health-focused funder





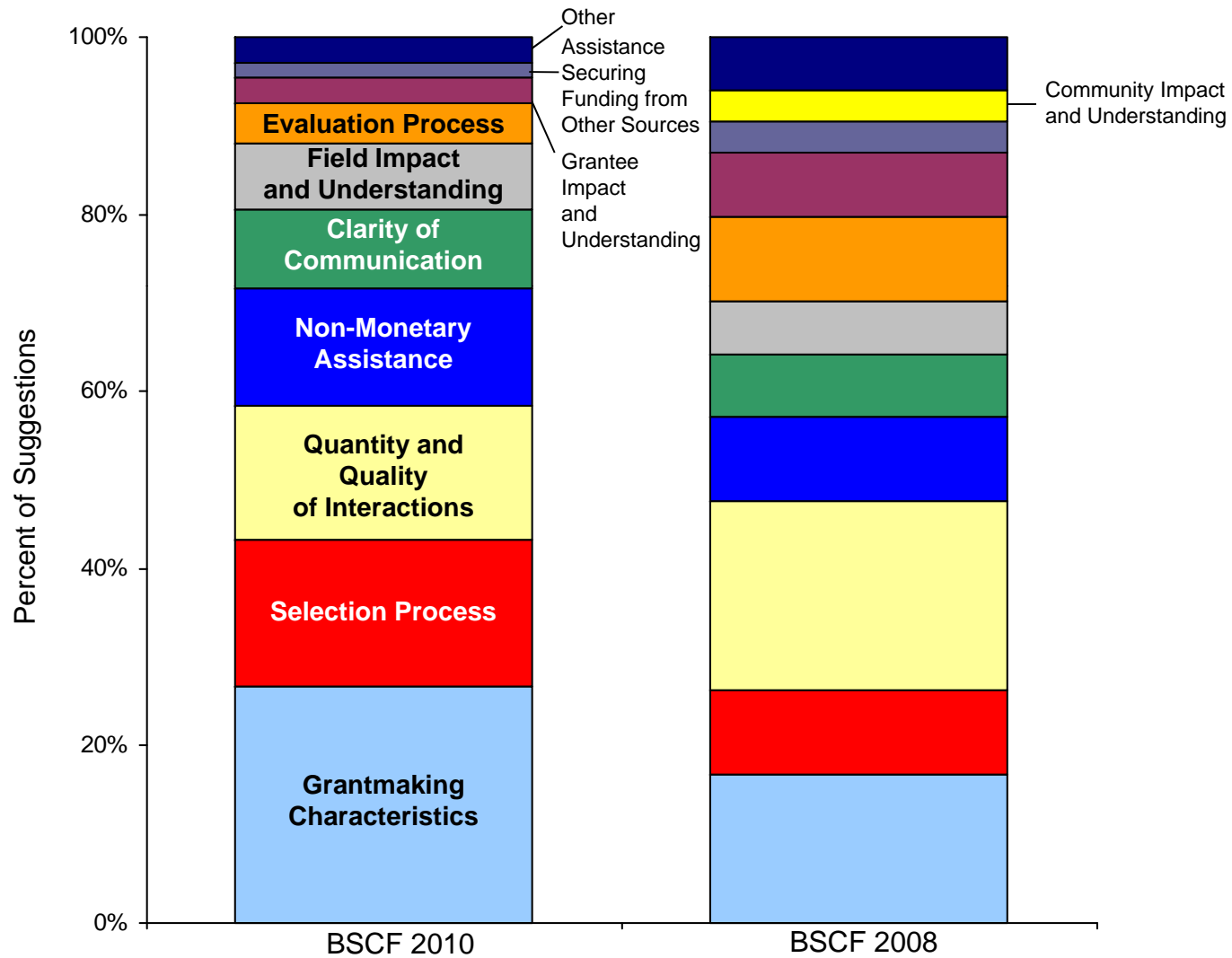
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# Grantee Suggestions for the Foundation (1)

Grantees were asked to provide any suggestions for how the Foundation could improve. The most frequently mentioned suggestions for improvement concern the Foundation's grantmaking characteristics. For BSCF, grantees gave a total of 67 suggestions.

*Topics of Grantee Suggestions*



Note: Proportions may not sum to 100 percent due to rounding.

# Grantee Suggestions for the Foundation (2)

% Grantee Suggestions		BSCF Grantee Suggestions
Topic of Grantee Suggestion	BSCF	Sub-Themes and Sample of Comments
Grantmaking Characteristics	27%	<b>More money (n=7):</b> “The only suggestion I have is to make more funding available.” “We would like to be considered for increased funding.” “I can not think of any other suggestions except that more money could be placed in the fund.” “The funding is based on patient volume from previous years. Our patient volume doubled in the last year, but this is not reflected in the OSHPD report that was used by the Foundation.” “Increase funding.”
		<b>Type and length of funding (n=7):</b> “Opportunities for ongoing support and program expansion.” “We always appreciate multi-year grants to help with planning and cut down on reporting. Extend to three years possibly?” “We do not have the funding or staff-time to work on organizational evaluation or restructuring. It is frustrating to us to be offered funding opportunities for these activities. We know they are important, but right now our priorities must be focused on survival and that is the type of support we need.” “Provide more funding for general operating support.”
		<b>Other (n=4):</b> “Although we worked through it, the Foundation appears oriented towards much smaller NPOs.” “The Foundation has expanded the number and types of agencies that it invites to respond to RFPs related to supporting community clinics. This makes it harder for the established Regional/County-based clinic consortia to remain stable when sub-regional groups and non-community clinic-specific agencies are invited to compete for limited dollars.”
Selection Process	16%	“Consistency in terms in the application would be helpful.” “The CyberGrants website does not allow you enough space to answer each question. You spend a lot of time removing words and not changing the meaning of your answer.” “My staff struggled with CyberGrants.” “The electronic system presented challenges: the applicant who submitted past proposals continues to be attached to receive critical emails even though he is no longer with the organization.” “This was the first time we could not ask for a particular funding amount in the grant application. It makes it more challenging if you are unclear what may or may not get funding.”
Quality and Quantity of Interactions	15%	“Phone conversations as the grant is in progress.” “A few more face-to-face meetings would be very helpful, especially at the beginning of the initiative for those who were new to the initiative.” “More direct outreach to grant recipients. Call people. Don’t just email. Have an opportunity each year for grant recipients to come to the Foundation and meet Foundation staff and other grant recipients.” “More grantee contact, site visits, more attempts to understand the particular characteristics of individual grantees.”

# Grantee Suggestions for the Foundation (2)

% Grantee Suggestions		BSCF Grantee Suggestions
Topic of Grantee Suggestion	BSCF	Sample of Comments
Non-monetary Assistance	12%	“Grantee meeting?” “Provide technical assistance across common grantee projects.” “I would like to see the Foundation convene some of the grantees to share our experiences and what we have done with the funding.”
Clarity of Communication	9%	“I think the area of the Strong Field Project could be explained better.” “More transparency with the funding allocation formulas – let everyone know how funding decisions are made.” “It seems that the Foundation is frequently re-evaluating their priorities to the extent that we never know if we will continue to be a good funding match. That can be difficult as we feel we must assume BSCF will not be a continuing partner and supporter.”
Field Impact and Understanding	7%	“More efforts in prevention of DV.” “Continue and/or increase operational funding for isolated rural/frontier community health centers” “Maybe more involvement in addressing public policy issues.” “Assisting with transitioning support for groups working to implement local public policy that sustains health coverage programs.”
Evaluation	4%	“Less evaluations about their work...and ours too. I would like to know that 90% of money is spent on service provision, if not more, and less on evaluations.” “The reporting time frame doesn’t fall at a quarterly or biannual period and therefore creates some difficulty in collecting and tabulating data.... BSCF typically funds mid-September and requires reporting in May [and so] we have to do additional compiling. My only suggestion would be to fund slightly later, with reporting in June to coincide with the mid-year data.” “We’d like a tiny bit of feedback on our progress reports – were they even read? Also, though our request was not fully funded, the Foundation never asked for a modified budget. That made reporting difficult and made the goals of the project a little less clear.”
Grantee Impact and Understanding	3%	“Foundation resources would have a greater impact if they were focused on the smaller agencies in the state. The state coalition is ineffective and local agencies with multi-million dollar budgets are barely impacted by your grant. Your funds and training could have a substantial impact on small agencies like ours.”
Assistance Securing Funding from Other Sources	3%	“I would humbly suggest that the Foundation use its considerable influence and stature to help persuade other California-based foundations and corporations to not abandon the ‘safety-net’ community clinics and health centers during this difficult and challenging economic period.” “Making introductions to other funders that would be a good fit and increased funding of legislative advocacy for the statewide coalition.”
Other	3%	“Less consultants. There are just too many consultants.” “The only bumps, and they are minor, have occurred because of staff turnover at the Foundation. My sense is that the Foundation has a lean staff, so when someone leaves it’s a challenge for others to cover until the empty position is filled.”

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# Review of Findings

Chart shows the percentile rank of BSCF 2010 (◆), BSCF 2008 (◇), BSCF 2006 (◇), and the median health-focused funder (◆) among all funders in the comparative set.

Indicator	Percentile Rank on Indicator					Description of Indicator	
	0th	25th	50th	75th	100th		
Impact on the Field						Grantees were asked to rate the funder's impact on their fields.	
Impact on the Community						Grantees were asked to rate the funder's impact on their local communities.	
Impact on the Grantee Organization						Grantees were asked to rate the funder's impact on their organizations.	
Satisfaction						Grantees were asked to rate their satisfaction with their funder.	
Quality of Relationships						This summary includes grantee ratings of funder fairness, responsiveness, grantee comfort approaching the funder if a problem arises, clarity of funder communication of its goals and strategy, and consistency of information provided by its communications resources.	
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.

Median Health-Focused Funder overlaps BSCF 2008.

# Funder Change Over Time

CEP has worked with 68 funders that have subscribed to the GPR at least twice. The table below shows the change in grantee perceptions of BSCF compared to the typical level of change we see across the first to second GPRs of repeat funders.

Measure	BSCF 2008 to 2010 Change	BSCF 2006 to 2008 Change	Typical Level of Change	
Impact on the Field	0.0	0.5	0.2	
Impact on the Community	-0.1	0.5	0.1	
Impact on the Grantee Organization	0.0	0.5	0.2	
Satisfaction	-0.1	0.1	0.1	
Quality of Relationships	-0.1	0.3	0.1	
Selection Process	0.0	0.2	0.1	
Reporting and Evaluation Processes	0.2	0.4	0.3	
Dollar Return on Grantee Administrative Hours	-\$167	\$575	\$167	
Percent Receiving Field or Comprehensive Non-Monetary Assistance	8%	-1%	1%	
Assistance Securing Funding from Other Sources	% Receiving	0%	4%	2%
	Impact	0.3	-1.1	0.3

# Analysis and Discussion (1)

- ♦ **Strong Impact on Grantees' Fields of Work**

Overall, grantees of Blue Shield of California Foundation (“BSCF”) express a strong and sustained positive impact on their fields of work. They rate the Foundation higher than seventy-five percent of funders in CEP’s dataset for the Foundation’s impact on their fields, its effect on public policy, and its advancement of knowledge in grantees’ fields. Grantees also rate the Foundation higher than ninety percent of funders for its understanding of grantees’ fields – a key predictor for the impact on grantees’ fields. In their open-ended comments for the Foundation, grantees write that the Foundation “gets it,” and that it is a “pioneer” in their fields. Multiple grantees comment on the importance of BSCF’s presence in the field, and one writes, “I appreciate the Foundation’s credibility in informing health insurance reform/policy issues as not only a funder but also as a philanthropic arm of a health insurance company. I believe this vantage point is a critical one.”

*CEP’s Questions for the Foundation:*

- ♦ *What programs and practices have led to the sustained ratings of the Foundation’s impact on the field? How can the Foundation maintain and build on these high ratings in the future?*



## Analysis and Discussion (2)

### ◆ Strengthening Relationships with Grantees

As described in detail in CEP's recent research report *Working with Grantees*, the foundation-grantee relationship is among the most important statistical predictors of grantee ratings on both overall satisfaction and foundations' impact on their organizations.<sup>1</sup> One of the key components of strong relationships is the quantity and quality of interactions that foundation staff members have with their grantees. On each of the interactions measures included in the report – which include the fairness of BSCF's treatment of grantees, grantee comfort in approaching the Foundation should a problem arise, and the responsiveness of Foundation staff – the Foundation is rated similarly to or below the typical funder. In particular, grantees rate significantly lower than in 2008 for their comfort in approaching the Foundation should a problem arise. Overall, the Foundation's ratings on each of these interactions measures are trending lower since 2008.

In their open-ended comments, grantees are generally positive about their interactions with Foundation staff members when they occur, describing them as "strategic and helpful". Grantee comments regarding the Foundation's processes are similarly enthusiastic – one describes the new online application system as "the most intuitive and easiest process [they] have ever used." Despite this praise for "efficient" processes, grantees request more involvement from Foundation staff members, who some grantees describe as "hands-off." Several grantees request "more communication," and one grantee reports that they have not "felt comfortable contacting the Foundation directly to set up a face-to-face meeting." Another writes, "It has been unclear who our primary contact is there, but we are very interested in deepening that relationship."

As reflected in these grantee comments, grantees are experiencing less contact with Foundation staff members than is typical. In nearly every instance in which CEP's survey asks about interaction between grantees and the Foundation, BSCF grantees report much less in-person, phone, or email interaction than is typical. For instance, 63 percent of BSCF grantees report interacting with their program officers yearly or less frequently – nearly three times the proportion as at the typical foundation – and this proportion has increased since 2008. Across foundations, this pattern of yearly or less frequent contact is associated with lower ratings for relationships between grantees and their funders. Additionally, a substantially smaller than typical proportion of BSCF grantees report either receiving a site visit or discussing their completed reports or evaluations with staff members. Those that engage in either of these activities rate significantly higher for the quality of their relationships with the Foundation, including both the responsiveness of Foundation staff and the fairness of the Foundation's treatment of grantees. They also rate higher for the Foundation's understanding of their organization and for the helpfulness of the evaluation process.

#### *CEP's Questions for the Foundation:*

- ◆ *Are there opportunities for staff to interact more frequently with grantees at key moments during the grant cycle, such as site visits during the application process or discussions following the evaluation process? As mentioned in 2008, how does the Foundation ensure that it engages with grantees with appropriate frequency given that Foundation staff manage more active grants than typical?*
- ◆ *How can Foundation staff appropriately set expectations regarding how often they are able to interact with grantees, while ensuring that grantees feel comfortable approaching the Foundation when problems arise?*

1: For more information, please download a free copy of *Working with Grantees* at [www.effectivephilanthropy.org](http://www.effectivephilanthropy.org).

## Analysis and Discussion (3)

### ♦ Impact on Grantee Organizations

While BSCF is rated more positively than is typical for its impact on grantees' fields, it is rated similarly to the typical funder for its impact on and understanding of grantees' organizations. When BSCF grantees were asked to name a suggestion for how the Foundation could improve, the largest proportion of suggestions concerned the characteristics of the grants made by the Foundation. In particular, these grantees mention the size of the Foundation's grants, asking that BSCF "make more funding available" because their organizations "need strategic dollars." BSCF provides grants that are smaller than typical (\$40K versus \$60K at the median), although grantees tend to be larger organizations than typical, and 85% of BSCF grantees have received consistent funding in the past. Indeed, BSCF grantees whose grant size is in the bottom quartile (\$30K) rate significantly lower for the Foundation's impact on their organization, understanding of their organization, and overall satisfaction, among other key measures.

The Foundation also provides a substantially larger than typical proportion of its grantees with operating support (61% of BSCF grantees versus 20% of grantees at the typical funder). These grantees rate the Foundation significantly higher for its impact on their organizations, as well as other key measures in the report. In their written comments, grantees are extremely enthusiastic about the operating support provided by the Foundation, with many writing that the "critical" support allowed them to "achieve many goals that would not have otherwise been possible." However, when they describe the importance of this operating support funding, many of these grantees indicate that they used that funding to "keep our doors open", "cover basic operating costs", or "fill some gaps." More than twice the typical proportion of BSCF grantees indicate that they used their grant primarily to maintain existing program work that would have otherwise been reduced or discontinued.

*CEP's Questions for the Foundation:*

- ♦ *Are there opportunities for the Foundation to provide larger grants to its grantees, particularly grantees who have a longer history of funding with the Foundation?*
- ♦ *Given the budget cuts in California, is the Foundation concerned that many grants appear to be ensuring the continuing operation of its grantees' organizations, potentially at the expense of deeper impact on grantees?*

## Analysis and Discussion (4)

### ♦ Non-Monetary Assistance

CEP's field-wide research suggests that providing just a few forms of non-monetary assistance to grantees is not as effective in strengthening their organizations as providing multiple types of complementary assistance – patterns that CEP's research has termed “field-focused” or “comprehensive assistance”.

At BSCF, grantees who report receiving field-focused or comprehensive patterns of non-monetary assistance report significantly higher ratings than do grantees who received no assistance for the Foundation's impact on their field and the strength of their relationships with the Foundation. BSCF is providing a larger proportion of grantees with these more helpful patterns of non-monetary assistance than it was in 2008 (11% in 2010 versus 3% in 2008).

A larger than typical proportion of BSCF grantees report receiving non-monetary assistance mostly through a third party. Grantees that report receiving most or all of the non-monetary assistance they receive through a third party rate the Foundation significantly lower for its understanding of their fields and communities, as well as for its fairness in its treatment of grantees. Multiple BSCF grantees report that they have “benefited greatly from consulting services arranged through the Foundation.” However, as one grantee writes: “it gets confusing at times because of the number of participants involved. There are quite a few consultants and subcontractors that are part of the Foundation's process and it is hard to tell who is responsible for what.”

*CEP's Questions for the Foundation:*

- ♦ *How does the Foundation determine which grantees receive more extensive amounts of non-monetary assistance? Are there opportunities to provide a larger proportion of grantees with field-focused or comprehensive non-monetary assistance?*
- ♦ *How does the Foundation determine who administers the non-monetary assistance provisioned to grantees? How can the Foundation ensure that non-monetary assistance provided by consultants is as effective as the support provided by staff members?*

### ♦ Variation by Program Area

BSCF grantees that received their grant through the Foundation's Health and Technology (Legacy) program area rate significantly lower than do other BSCF grantees on various measures across the report. These measures include all three major impact measures in the report, grantees' overall satisfaction with the Foundation, and the clarity of the Foundation's communication of its goals and strategy. One Legacy grantee writes, “The area for which I was funded is no longer a Foundation priority. It could have had a big impact. But this is no longer possible.” The Foundation has publicly communicated that these grantees are being phased out of the Foundation's grantmaking.

*CEP's Questions for the Foundation:*

- ♦ *Are these ratings concerning given the Foundation's decision to shift away from funding this program area? How was this decision communicated to grantees?*
- ♦ *What can the Foundation learn about future program transitions from the lower ratings and comments made by this program's grantees?*

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# Racial Diversity

The following section reflects the results of questions related to diversity. These questions are meant to address funder communication and impact related to grantees' work and organizations.

- Forty-nine percent (49%) of BSCF's grantees indicate that the work funded by this grant addresses topics in which racial diversity is a relevant component.

Measure	BSCF 2010				Full Dataset Median			
<b>Foundation Communication Related to Racial Diversity</b>								
<i>Has the Foundation communicated with you about racial diversity related to:</i>	Yes	No, but not relevant	No, but Fdn should	Don't know	Yes	No, but not relevant	No, but Fdn should	Don't know
The Foundation itself (staff, board, etc.)	11%	39%	16%	34%	13%	44%	16%	27%
The Foundation's programmatic work (funding, mission, programs)	31%	25%	15%	29%	35%	27%	16%	22%
The grantee's organization (staff, board, etc.)	17%	40%	13%	31%	24%	38%	14%	24%
The work associated with this grant in particular	26%	34%	12%	27%	33%	34%	12%	22%
<b>Impact of Communication Related to Racial Diversity (only asked of grantees who indicated 'yes' to the relevant question above)</b>								
Impact of communication on grantee's <b>organization</b> (1="Negative impact", 4="Neither positive nor negative impact", and 7="Positive impact")	5.3				5.1			
Impact of communication on grantee's <b>work</b> (1="Negative impact", 4="Neither positive nor negative impact", and 7="Positive impact")	5.4				5.2			
<b>Relevance of Racial Diversity to Funded Work</b>								
Percent of grantees who indicate that the work funded by this grant addresses topics in which racial diversity is a relevant component	49%				56%			

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# Grantmaking Characteristics

Measure	BSCF 2010	BSCF 2008	BSCF 2006	Full Dataset Median	Health-Focused Funder Median
<b>Length of Grant Awarded</b>					
<i>Average grant length</i>	2.0 years	2.0 years	1.6 years	2.1 years	2.1 years
1 year	46%	45%	70%	51%	41%
2 years	37%	37%	21%	20%	25%
3 years	5%	7%	6%	17%	25%
4 years	3%	6%	1%	4%	4%
5 or more years	9%	6%	1%	8%	6%
<b>Type of Grant Awarded</b>					
Program/Project Support	32%	40%	52%	64%	69%
General Operating Support	61%	55%	44%	20%	17%
Technical Assistance	5%	2%	1%	5%	9%
Building/Renovation	0%	1%	1%	6%	2%
Other Capital Support	1%	0%	1%	2%	1%
Scholarship/Fellowship	0%	0%	0%	2%	1%
Endowment Support	0%	0%	0%	1%	1%
Event/Sponsorship Funding <sup>1</sup>	0%	N/A	N/A	N/A	N/A
<b>Grant Amount Awarded</b>					
<i>Median grant size</i>	\$40 K	\$40 K	\$30 K	\$60 K	\$65 K
Less than \$10K	0%	1%	9%	11%	7%
\$10K - \$24K	13%	18%	32%	15%	11%
\$25K - \$49K	45%	42%	23%	15%	14%
\$50K - \$99K	17%	19%	22%	17%	20%
\$100K - \$149K	6%	5%	4%	10%	11%
\$150K - \$299K	8%	6%	5%	13%	18%
\$300K - \$499K	3%	3%	2%	6%	10%
\$500K - \$999K	3%	3%	1%	6%	5%
\$1MM and above	3%	2%	2%	7%	5%
<b>Median Percent of Budget Funded By Grant (Annualized)</b>					
Size of grant relative to size of grantee budget	0.8%	0.8%	0.6%	3.3%	3.2%

<sup>1</sup>: 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 59 funders for which data is available, the average percentage of grantees indicating they received event/sponsorship funding was 2 percent.

# Grantee Characteristics (1)

Measure	BSCF 2010	BSCF 2008	BSCF 2006	Full Dataset Median	Health-Focused Funder Median
<b>Operating Budget of Grantee Organization</b>					
<i>Median budget</i>	\$4.0MM	\$3.0MM	\$2.8MM	\$1.4MM	\$1.3MM
< \$100K	2%	2%	2%	8%	6%
\$100K - \$499K	8%	8%	10%	20%	23%
\$500K - \$999K	10%	13%	11%	14%	14%
\$1MM - \$4.9MM	33%	38%	34%	30%	27%
\$5MM - \$24.9MM	33%	29%	28%	18%	20%
\$25MM and above	14%	11%	15%	11%	10%
<b>Length of Establishment of Grantee Organizations</b>					
<i>Median length of establishment</i>	31 years	30 years	28 years	24 years	23 years
Less than 5 years	3%	4%	2%	7%	10%
5 - 9 years	6%	4%	7%	14%	14%
10 -19 years	18%	18%	19%	22%	20%
20 - 49 years	63%	66%	63%	36%	36%
50 - 99 years	6%	6%	7%	12%	11%
100 years or more	3%	2%	3%	9%	9%



# Grantee Characteristics (2)

Measure	BSCF 2010	BSCF 2008	BSCF 2006	Full Dataset Median	Health-Focused Funder Median
<b>Length of Time Which Grantees Have Regularly Conducted the Funded Programs<sup>1</sup></b>					
Less than 1 year	8%	10%	N/A	17%	22%
1 - 5 years	57%	46%	N/A	50%	55%
6 - 10 years	12%	13%	N/A	14%	12%
More than 10 years	23%	31%	N/A	19%	11%
<b>Pattern of Grantees' Funding Relationship with the Foundation<sup>2</sup></b>					
First grant received from the Foundation	9%	N/A	N/A	30%	N/A
Consistent funding in the past	85%	N/A	N/A	53%	N/A
Inconsistent funding in the past	6%	N/A	N/A	17%	N/A
<b>Length of Funding Relationship with the Foundation<sup>3</sup></b>					
1 - 5 years	61%	N/A	N/A	52%	N/A
6 - 10 years	38%	N/A	N/A	28%	N/A
More than 10 years	2%	N/A	N/A	20%	N/A
<b>Funding Status and Grantees Previously Declined Funding</b>					
Percent of grantees currently receiving funding from the Foundation	89%	91%	95%	75%	78%
Percent of grantees previously declined funding by the Foundation	18%	21%	12%	33%	36%

1: BSCF 2006 data not available due to changes in the survey instrument.

2: Represents data from 45 funders. This question includes a "don't know" response option; 3 percent of BSCF 2010 respondents answered "don't know", compared to 2 percent at the median funder. BSCF 2008, BSCF 2006, and health-focused funder data not available due to changes to the survey instrument.

3: Represents data from 28 funders. This question includes a "don't know" response option; 11 percent of BSCF 2010 respondents answered "don't know", compared to 4 percent at the median funder. BSCF 2008, BSCF 2006, and health-focused funder data not available due to changes to the survey instrument.

# Grantee Characteristics (3)

Measure	BSCF 2010	BSCF 2008	BSCF 2006	Full Dataset Median	Health-Focused Funder Median
<b>Job Title of Respondents<sup>1</sup></b>					
Executive Director	36%	N/A	N/A	46%	N/A
Development Director	12%	N/A	N/A	9%	N/A
Other Senior Management	18%	N/A	N/A	14%	N/A
Project Director	8%	N/A	N/A	13%	N/A
Other Development Staff	12%	N/A	N/A	6%	N/A
Volunteer	0%	N/A	N/A	2%	N/A
Other	14%	N/A	N/A	10%	N/A
<b>Gender of Respondents<sup>2</sup></b>					
Female	80%	77%	77%	62%	71%
Male	20%	23%	23%	38%	29%
<b>Race/Ethnicity of Respondents<sup>3</sup></b>					
Caucasian/White	64%	71%	N/A	80%	83%
African-American/Black	7%	4%	N/A	7%	6%
Hispanic/Latino	11%	9%	N/A	4%	5%
Asian (incl. Indian subcontinent)	10%	8%	N/A	3%	2%
Multi-racial	5%	4%	N/A	3%	2%
American Indian/Alaskan Native	3%	3%	N/A	1%	1%
Pacific Islander	1%	0%	N/A	0%	0%
Other	0%	2%	N/A	2%	0%

1: Represents data from 45 funders. BSCF 2008, BSCF 2006, and health-focused funder data 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 BSCF 2010 respondents selected "other" or "prefer not to say," compared to 3 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 8 percent of BSCF 2010 respondents selected "prefer not to say," compared to 5 percent at the median funder. BSCF 2006 data not available due to changes to the survey instrument.

# Funder Characteristics

Measure	BSCF 2010	BSCF 2008	BSCF 2006	Full Dataset Median	Health-Focused Funder Median
<b>Financial Information</b>					
Total assets	\$54.5MM	\$72.9MM	\$50.7MM	\$256.8MM	\$168.7MM
Total giving	\$34.7MM	\$31.5MM	\$12.7MM	\$14.6MM	\$13.7MM
<b>Administrative Expenses</b>					
Administrative expense as percent of total assets	7.6%	2.8%	2.8%	1.2%	1.2%
Administrative expense as percent of total giving	11.9%	6.5%	11.1%	21.6%	22.9%
<b>Funder Staffing</b>					
Total staff (FTEs)	17	16	11	13	11
Percent of staff working directly with grantees	29%	100%	86%	89%	97%
Percent of staff who are program staff	47%	50%	64%	55%	53%

Note: Excludes FTEs who are volunteers or unpaid staff members.

Source: Self-reported data provided by BSCF and other GPR and Operational Benchmarking Report (OBR) subscribers from 2003-2010 survey rounds.

# Funders in Dataset

The 262 philanthropic funders whose grantees CEP has surveyed are listed below. Those that were independently surveyed are denoted by an asterisk (\*).

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

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# About the Center for Effective Philanthropy (CEP)

## Mission

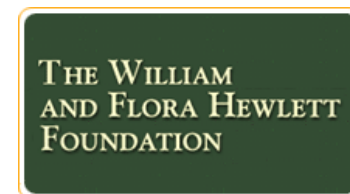
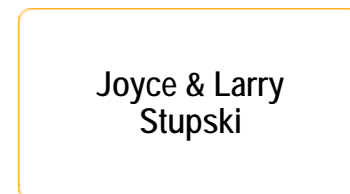
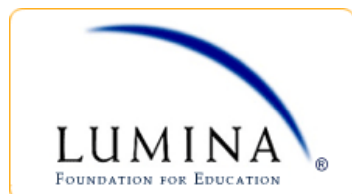
To provide data and create insight so philanthropic funders can better define, assess, and improve their effectiveness – and, as a result, their intended impact.

## Vision

We seek a world in which pressing social needs are more effectively addressed. We believe improved performance 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)
	<i>A Time of Need: Nonprofits Report Poor Communication and Little Help from Foundations During the Economic Downturn</i> (2010)
	<i>Lessons from the Field: From Understanding to Impact</i> (2010)
	<i>Grantees Report Back: Helpful Reporting and Evaluation Processes</i> (2011)
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

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