

CONFIDENTIAL

Grantee Perception Report®

prepared for

Blue Shield of California Foundation

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THE CENTER FOR
EFFECTIVE PHILANTHROPY

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Executive Summary – Key Findings

As in past surveys, Blue Shield of California Foundation (BSCF) continues to be rated positively across many of the measures in the Grantee Perception Report (GPR) – particularly for its work in grantees’ fields. Grantees rate the Foundation significantly more positively than they did in 2010 on several key measures, including BSCF’s understanding of their fields, the quality of the funder-grantee relationship, and the clarity and consistency of the Foundation’s communications. However, when asked to provide suggestions for how BSCF could improve, many grantees continue to cite characteristics of the Foundation’s grants. In addition, the Foundation is rated significantly less positively than it was in 2010 for the helpfulness of its selection and reporting/evaluation processes.

Grantees continue to rate the Foundation as positively as, and in some cases even more positively than, they did in 2010 for its work in their fields. BSCF is rated above the majority of funders for its impact on and understanding of grantees’ fields . In addition, many grantees note appreciation for the Foundation’s advancement of knowledge and impact on public policy in their fields. As one grantee comments, “BSCF has been a leader not only on specific issues...but also on larger policy issues such as health care reform.”

The Foundation receives typical ratings for its impact on grantee organizations, and these ratings are related to characteristics of the Foundation’s grants. Grantees rate BSCF similar to the typical funder for its impact on their organizations and its understanding of their organizations’ goals and strategies. A larger than typical proportion of the Foundation’s grants go towards operating support, however grants made by the Foundation tend to be smaller than typical. Though many grantees praise the Foundation for its “understanding of the need for general operating dollars,” when asked how BSCF can improve the largest proportion of grantees still cite the characteristics of the Foundation’s grants.

Grantees rate the Foundation similarly to or more positively than they did in 2010 on all of the items comprising the relationship summary measure. The Foundation is rated significantly higher than it was in 2010 for the responsiveness of staff and the clarity and consistency of its communications to grantees. Still, more than half of the Foundation’s grantees report interacting with their program officer on a yearly or less frequent basis.

Grantees indicate that the Foundation’s selection and reporting/evaluation processes are “very streamlined and very grantee-friendly,” but also find them to be less helpful than they did in 2010. BSCF is rated significantly less positively than it was in 2010 for the helpfulness of its selection and reporting/evaluation processes in strengthening grantees’ organizations. Though grantees express appreciation for the Foundation’s “simple,” grant processes, grantees that have more in-depth conversations with the Foundation – such as conversations about how the results of their grant would be assessed, or a discussions about a completed report/evaluation – find these processes to be more helpful in strengthening their organizations.

A larger than typical proportion of BSCF’s grantees indicate that they receive intensive patterns of non-monetary assistance. Eighteen percent – a larger than typical proportion – of the Foundation’s grantees indicate that they receive field-focused or comprehensive patterns of non-monetary assistance. These grantees rate the Foundation significantly higher on a variety of measures in the report. One grantee observes, “BSCF has created an opportunity for leaders within the field to convene and forge strong partnerships to move the field forward.”

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Background

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

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

Methodology – The Foundation’s Grantee Survey

- ♦ The Center for Effective Philanthropy (CEP) surveyed the grantees of Blue Shield of California Foundation (“BSCF”) during September and October 2012. 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 ¹
BSCF 2012	September and October 2012	2011	397	254	64%
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.

Program Areas	Respondents
Health Care and Coverage	154
Blue Shield Against Violence	97

- ♦ Selected grantee comments are also shown throughout this report. This selection of comments highlights major themes and reflects trends in the data. These selected comments over-represent negative comments about the Foundation in order to offer a wide range of perspectives.
- ♦ The grantee feedback in this report was collected through CEP’s proprietary GPR survey. All individual grantee responses have been kept confidential: CEP does not report or share individual responses or identifying characteristics of survey respondents with funders. All comments are redacted to protect grantee confidentiality.

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

2: Three grantees indicated that they did not know their program area. 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 nine years. Please see Appendix B for a list of all funders whose grantees CEP has surveyed.

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

- ◆ BSCF is also compared to a cohort of 18 health-focused funders. The group of 18 funders comprises the following funders:

Health-Focused Funders	
Blue Cross and Blue Shield of Minnesota Foundation	Community Memorial Foundation
Blue Cross and Blue Shield of North Carolina Foundation	Connecticut Health Foundation
Blue Cross Blue Shield of Massachusetts Foundation	Endowment for Health
Blue Shield of California Foundation	Harvest Foundation of the Piedmont
California Endowment	MetroWest Community Health Care Foundation
California HealthCare Foundation	Missouri Foundation for Health
California Wellness Foundation	New York State Health Foundation
Colorado Health Foundation	Northwest Health Foundation
Colorado Trust	Saint Luke’s Foundation

- ◆ Within this report, CEP describes the comparison between BSCF grantee ratings and grantee ratings of other funders based on the percentile rank of BSCF. On measures with a 1-7 scale, grantee ratings for BSCF are described as “above typical” or “above the median funder” when they fall above the 65th percentile, and “below typical” or “below the median funder” when they fall below the 35th percentile. Proportions of BSCF grantees are described as “larger than typical” or “smaller than typical” when the proportion being referenced falls above or below the 65th or 35th percentile.

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 awards smaller grants, but awards a larger than typical proportion of its grantees with operating support.

Survey Item	BSCF 2012	BSCF 2010	BSCF 2008	BSCF 2006	Full Dataset Median	Health-Focused Funder Median
Grant Size						
Median grant size	\$30K	\$40K	\$40K	\$30K	\$60K	\$63K
Grant Length						
Average grant length	1.9 years	2.0 years	2.0 years	1.6 years	2.1 years	2.0 years
Percent of grantees receiving multi-year grants	48%	54%	55%	30%	49%	58%
Type of Support						
Percent of grantees receiving operating support	66%	61%	55%	44%	20%	15%
Percent of grantees receiving program/project support	27%	32%	40%	52%	65%	71%
Percent of grantees receiving other types of support	7%	7%	5%	4%	15%	14%

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 are larger organizations that are more likely to have conducted programs for more 6 years or more.

Survey Item	BSCF 2012	BSCF 2010	BSCF 2008	BSCF 2006	Full Dataset Median	Health-Focused Funder Median
Budget of Funded Organizations						
Typical organizational budget	\$3.6MM	\$4.0MM	\$3.0MM	\$2.8MM	\$1.4MM	\$1.3MM
Duration of Funded Program and Grantee Organization¹						
Programs conducted 6 years or more	41%	35%	44%	N/A	33%	19%
Median length of establishment of grantee organizations	33 years	31 years	30 years	28 years	24 years	27 years

Note: In most cases, the structural characteristics of grantees are not strong predictors of how grantees perceive funders, suggesting that it is possible for funders with even a unique set of grantees to attain high ratings. For additional information on grantee characteristics related to these survey items refer to Appendix B. BSCF 2006 data on "Programs conducted 6 years or more" not available due to changes to the survey instrument.

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

Structural Characteristics of Funders

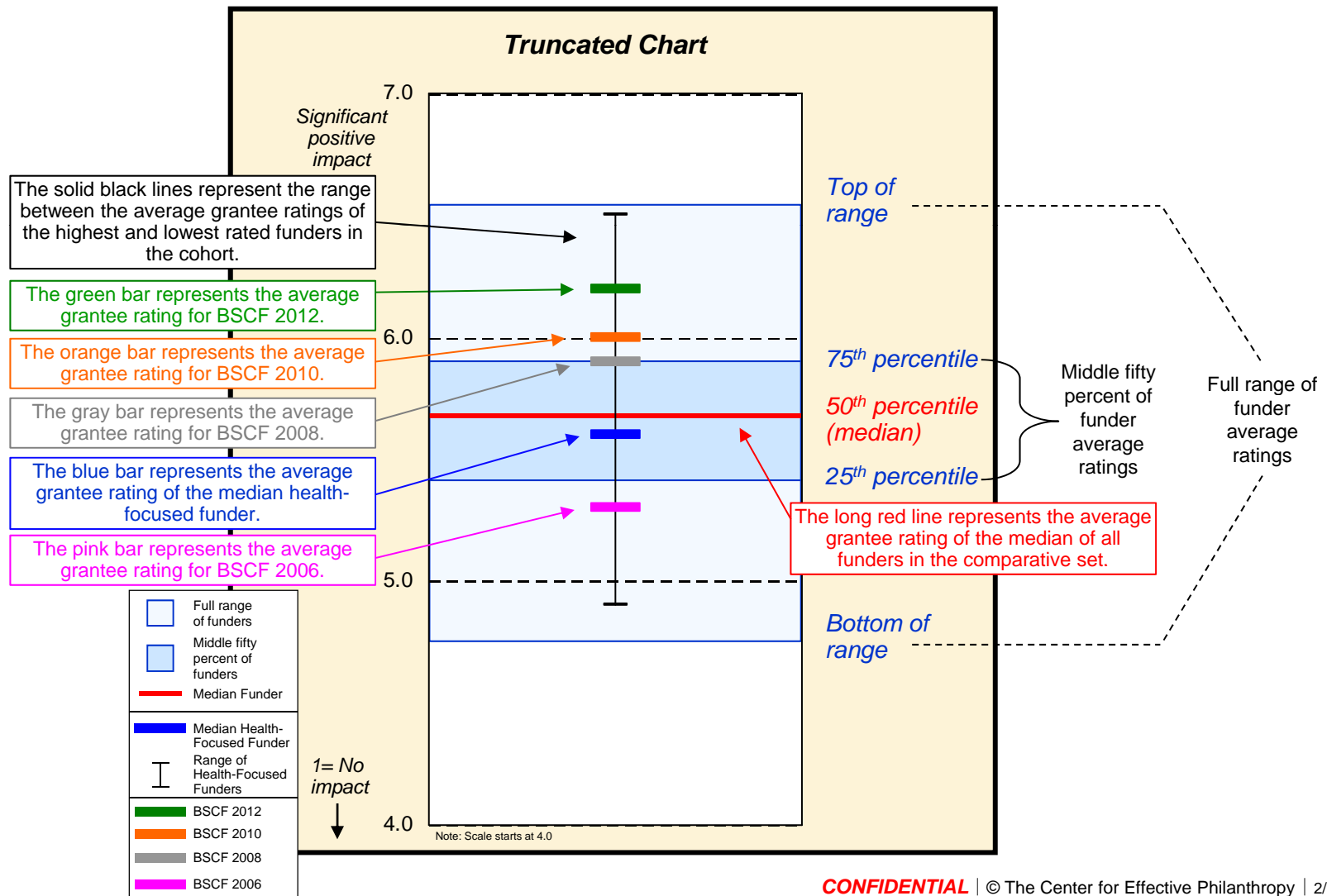
- ◆ This table is intended to provide context to the Foundation in thinking about its GPR results relative to its grantmaking and staffing. This information is based on IRS filings and data supplied by philanthropic funders that have subscribed to the GPR.
- ◆ The number of grants processed and managed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

Survey Item	BSCF 2012	BSCF 2010	BSCF 2008	BSCF 2006	Full Dataset Median	Health-Focused Funder Median
Program Staff Load						
Dollars awarded per program staff full-time employee	\$4.9MM	\$4.3MM	\$3.9MM	\$1.8MM	\$2.5MM	\$1.5MM
Applications per program full-time employee	68 applications	34 applications	75 applications	61 applications	27 applications	28 applications
Grants awarded per program full-time employee	58 grants	31 grants	45 grants	60 grants	19 grants	19 grants
Active grants per program full-time employee	57 grants	59 grants	67 grants	64 grants	32 grants	30 grants

Note: Funders of different sizes and focuses choose to structure their organizations differently – so, as with all the information contained in this report, the Foundation should interpret data in this section in light of its distinctive goals and strategy. For additional information on funder characteristics related to these survey items refer to Appendix B.

Reading GPR Charts

Much of the grantee perception data in the GPR is presented in the format below. These graphs show the average of grantee responses for BSCF, over a background that shows percentiles for the average ratings for the full comparative set of 290 philanthropic funders. **Throughout the report, many charts in this format are truncated from the full scale because funder averages fall within the top half of the absolute range.**



Foundation Descriptors

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

Note: The size of each word indicates the frequency with which it was written by grantees. “Supportive” was the word most frequently mentioned by BSCF grantees, and was mentioned 34 times.



Note: The above “word cloud” was produced using a free tool available at www.wordle.net. Images created by the Wordle.net web application are licensed under a Creative Commons Attribution 3.0 United States License.

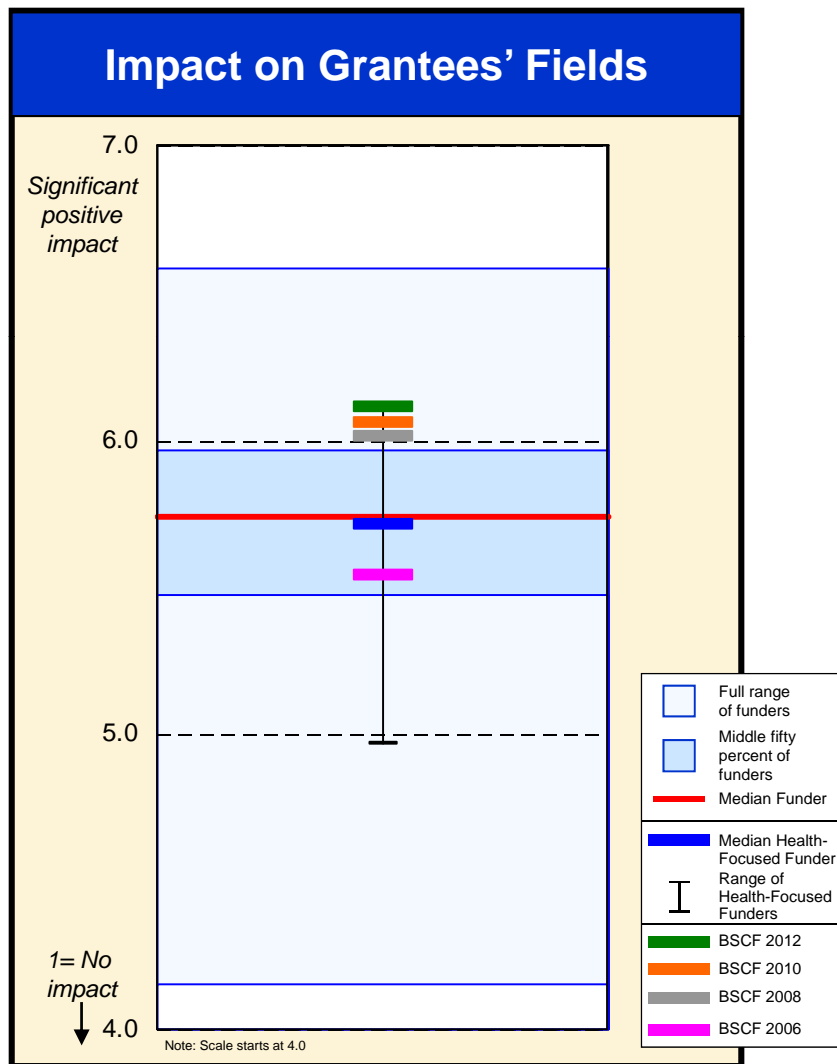
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Impact on Grantees' Fields

On impact on grantees' fields, BSCF is rated:

- above 88 percent of funders
- above 94 percent of health-focused funders in the cohort



Selected Grantee Comments

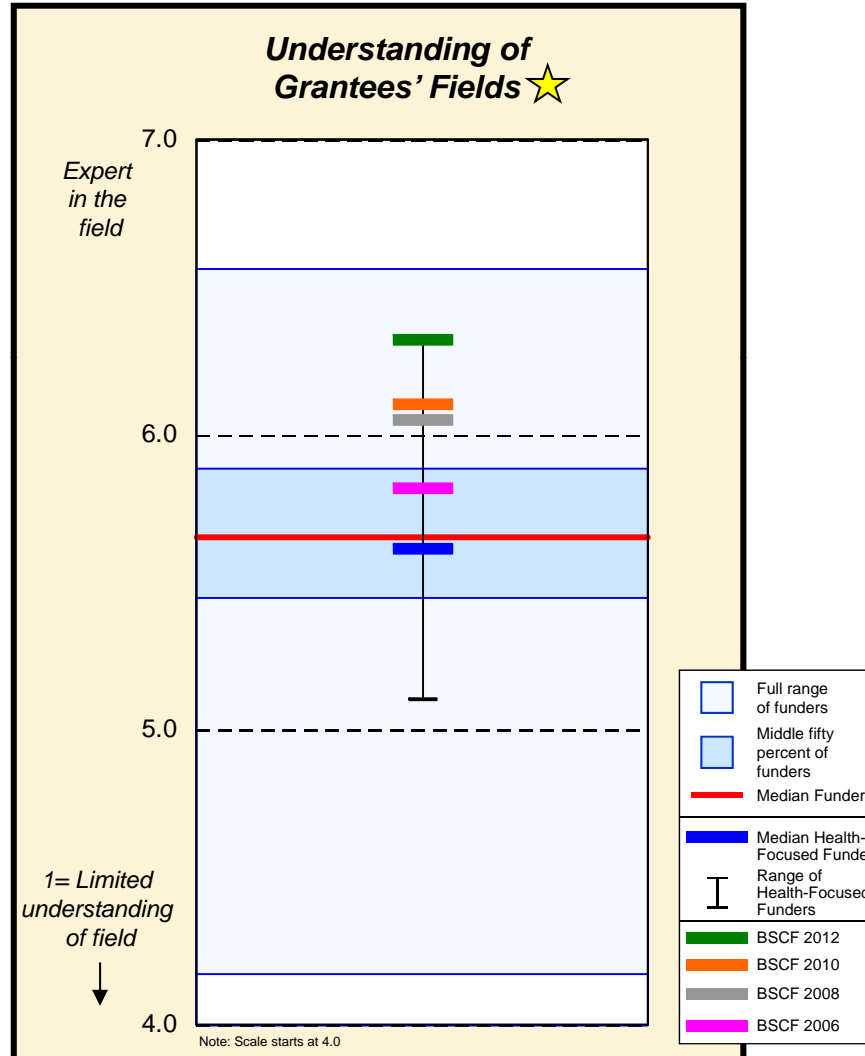
- ♦ *“It is obvious that BSCF has been a leader not only on specific issues such as domestic violence, but also on larger policy issues such as health care reform.”*
- ♦ *“BSCF has been a leading advocate on policy issues around DV, and has provided capacity building to organizations within the field to help improve and strengthen their work on both policy and direct service provision to victims.”*
- ♦ *“I think BSCF is and can be even more profoundly influential in shaping how the health care system in California changes for the better. I would like to see them help (if possible) the state Medical program become more electronically efficient.”*
- ♦ *“BSCF has strengthened a field that is precarious at best. They have strengthened the collective voice, strengthened individual agencies and collaborations. Without BSCF I believe the field would have lost agencies and services thus reducing the effectiveness of us all.”*

Note: This question includes a “don’t know” response option; 0 percent of BSCF 2012 respondents answered “don’t know”, compared to 8 percent at the median funder, 4 percent of BSCF 2010 respondents, 5 percent of BSCF 2008 respondents, 10 percent of BSCF 2006 respondents, and 5 percent of respondents at the median health-focused funder.

Understanding of Grantees' Fields

On understanding of grantees' fields, BSCF is rated:

- above 98 percent of funders
- higher than all other health-focused funders in the cohort



Note: This question includes a "don't know" response option; 1 percent of BSCF 2012 respondents answered "don't know", compared to 6 percent at the median funder, 4 percent of BSCF 2010 respondents, 7 percent of BSCF 2008 respondents, 12 percent of BSCF 2006 respondents, and 4 percent of respondents at the median health-focused funder.

★ = BSCF 2012 rating is significantly higher than BSCF 2010 rating at a 90 percent confidence interval.

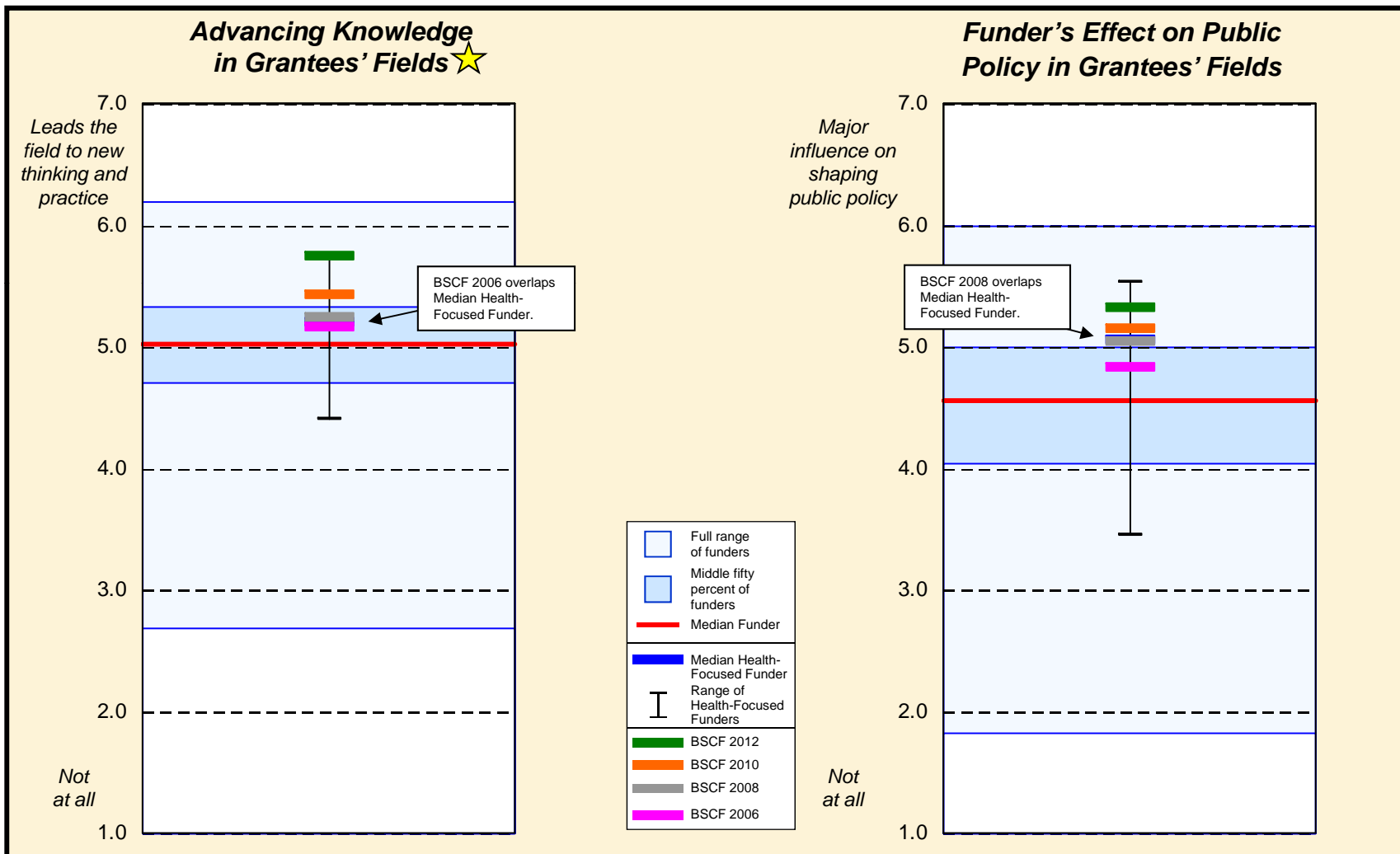
Advancing Knowledge in Fields and Effect on Public Policy

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

- above 93 percent of funders
- higher than all other health-focused funders in the cohort

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

- above 90 percent of funders
- above 76 percent of health-focused funders in the cohort



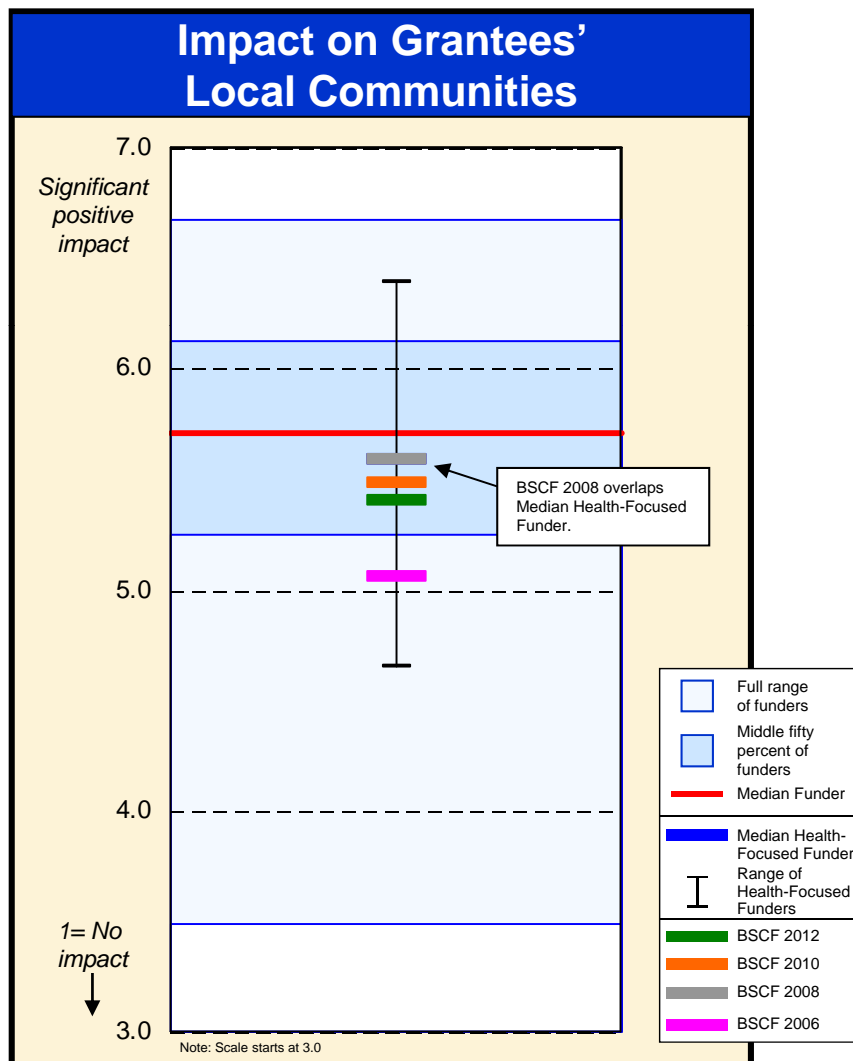
Note: The questions depicted on these charts include a "don't know" response option. In the left-hand chart, 14 percent of BSCF 2012 respondents answered "don't know", compared to 23 percent at the median funder, 17 percent of BSCF 2010 respondents, 26 percent of BSCF 2008 respondents, 35 percent of BSCF 2006 respondents, and 13 percent of respondents at the median health-focused funder. In the right-hand chart, 26 percent of BSCF 2012 respondents answered "don't know", compared to 37 percent at the median funder, 25 percent of BSCF 2010 respondents, 40 percent of BSCF 2008 respondents, 51 percent of BSCF 2006 respondents, and 22 percent of respondents at the median health-focused funder.

★ = BSCF 2012 rating is significantly higher than BSCF 2010 rating at a 90 percent confidence interval.

Impact on Grantees' Local Communities

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

- below 67 percent of funders
- below 71 percent of health-focused funders in the cohort



Selected Grantee Comments

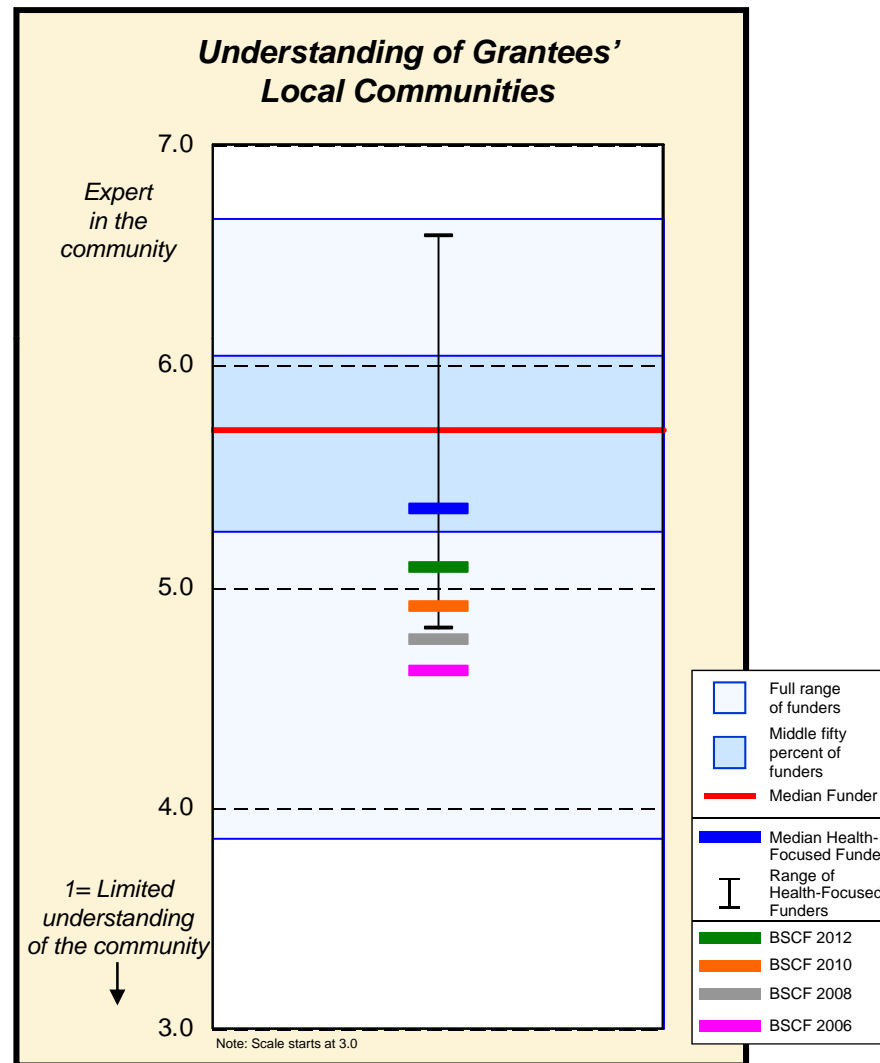
- ♦ “[The Foundation] assists direct service providers in learning how to address domestic violence in a culturally respectful way within [our] community.”
- ♦ “I think it is important to have a funder that cares about and has a presence throughout ALL of California. So many funders I see are either North or South. BSCF is one of a handful that has the scope to do good work all over the state.”
- ♦ “BCFS is leveraging its impact in our community by encouraging and supporting collaborative effort and integrated approaches to improving health and wellbeing of the community's residents.”

Note: This question includes a “don't know” response option; 4 percent of BSCF 2012 respondents answered “don't know”, compared to 10 percent at the median funder, 8 percent of BSCF 2010 respondents, 10 percent of BSCF 2008 respondents, 11 percent of BSCF 2006 respondents, and 8 percent of respondents at the median health-focused funder. Chart does not show data from two funders whose community impact rating is less than 3.0.

Understanding of Grantees' Local Communities

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

- below 83 percent of funders
- below 82 percent of health-focused funders in the cohort



Note: This question includes a "don't know/not applicable" response option; 19 percent of BSCF 2012 respondents answered "don't know/not applicable", compared to 12 percent at the median funder, 19 percent of BSCF 2010 respondents, 22 percent of BSCF 2008 respondents, 29 percent of BSCF 2006 respondents, and 9 percent of respondents at the median health-focused funder.

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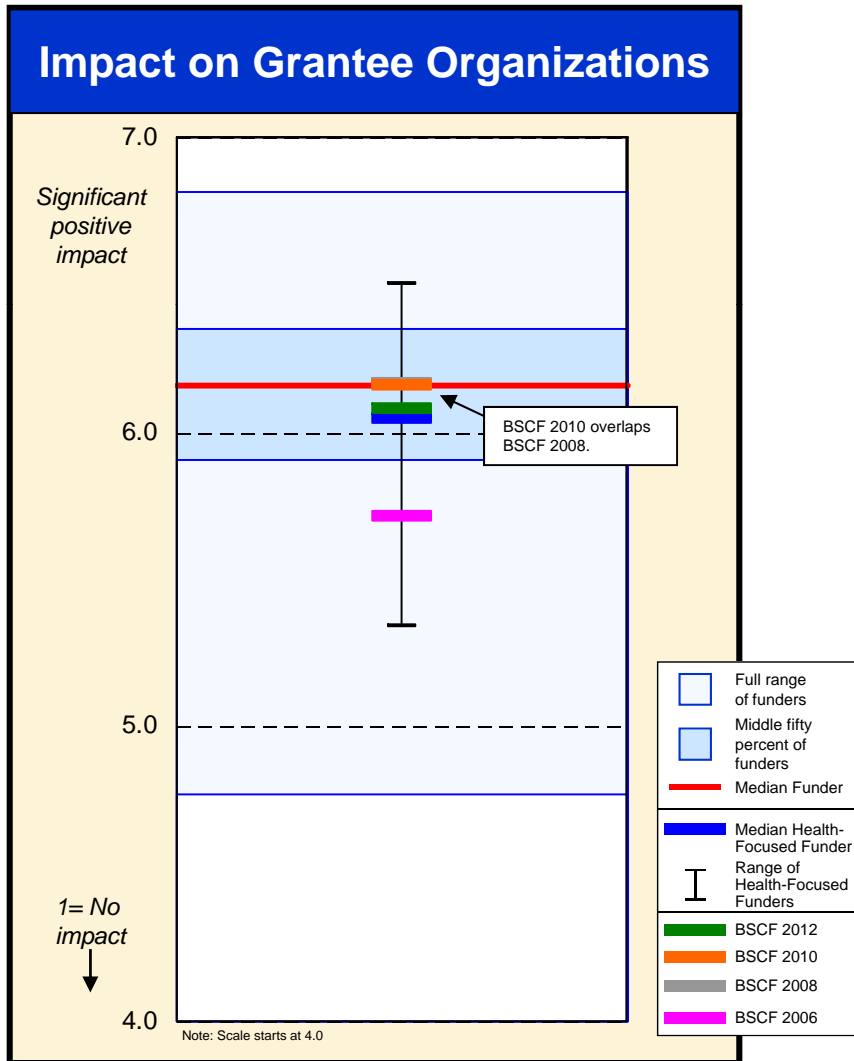
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Impact on Grantee Organizations

On impact on grantee organizations, BSCF is rated:

- below 60 percent of funders
- above 59 percent of health-focused funders in the cohort



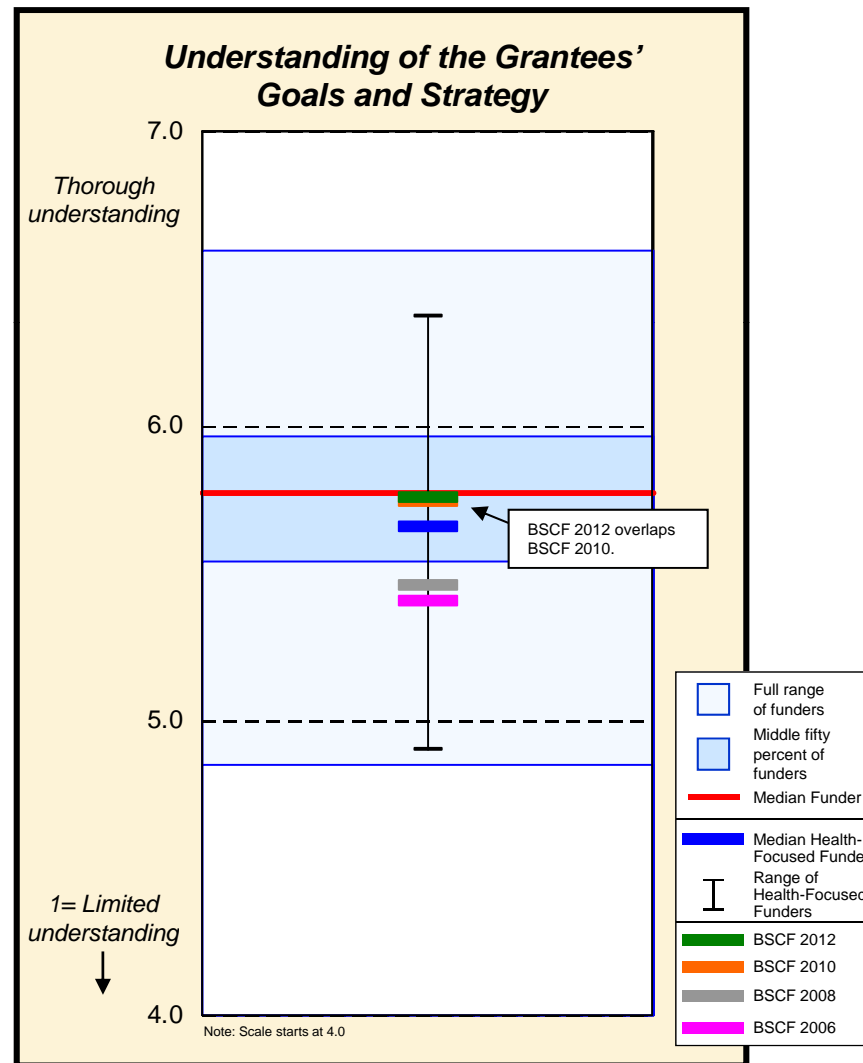
Selected Grantee Comments

- ♦ *“By engaging with training and allowing space to create community for existing and emerging leaders, BSCF has been pivotal in furthering our work. They have provided relevant materials and learnings to help us take care of ourselves, our staff/volunteers and agencies – which leads to quality client service provision.”*
- ♦ *“Blue Shield is to be thanked for continuing to support community health centers with core operating funds. It is wonderful not to have to invent new programs to receive funding that helps support our core operations.”*
- ♦ *“BSCF funds are extremely helpful because they are for general operating. Twice, we have been able to utilize BSCF to leverage funds, which has been extremely helpful.”*
- ♦ *“The core support grants are a critical recurring funding stream that has been stabilizing and predictable – one of the few grants of its kind for our work.”*

Understanding of Grantees' Goals and Strategy

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

- below 51 percent of funders
- above 71 percent of health-focused funders in the cohort

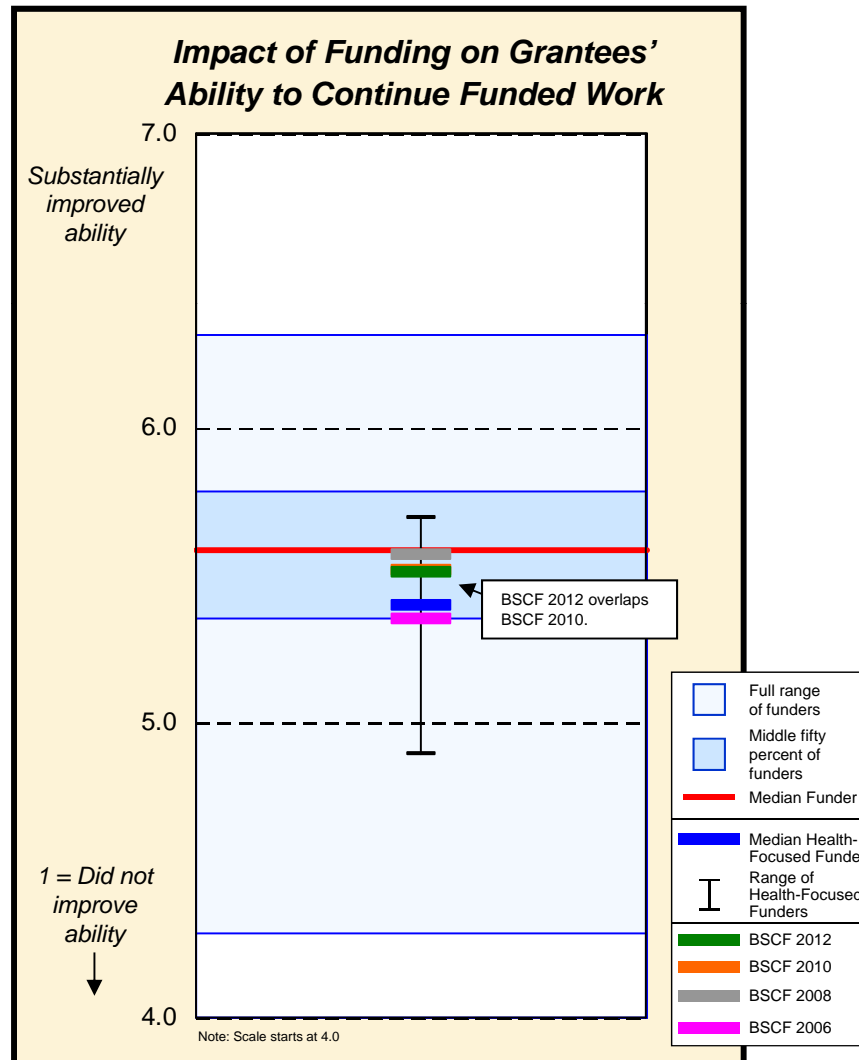


Note: This question includes a "don't know" response option; 8 percent of BSCF 2012 respondents answered "don't know", compared to 6 percent at the median funder, 9 percent of BSCF 2010 respondents, 17 percent of BSCF 2008 respondents, 24 percent of BSCF 2006 respondents, and 5 percent of respondents at the median health-focused funder.

Impact on Sustainability of Funded Work

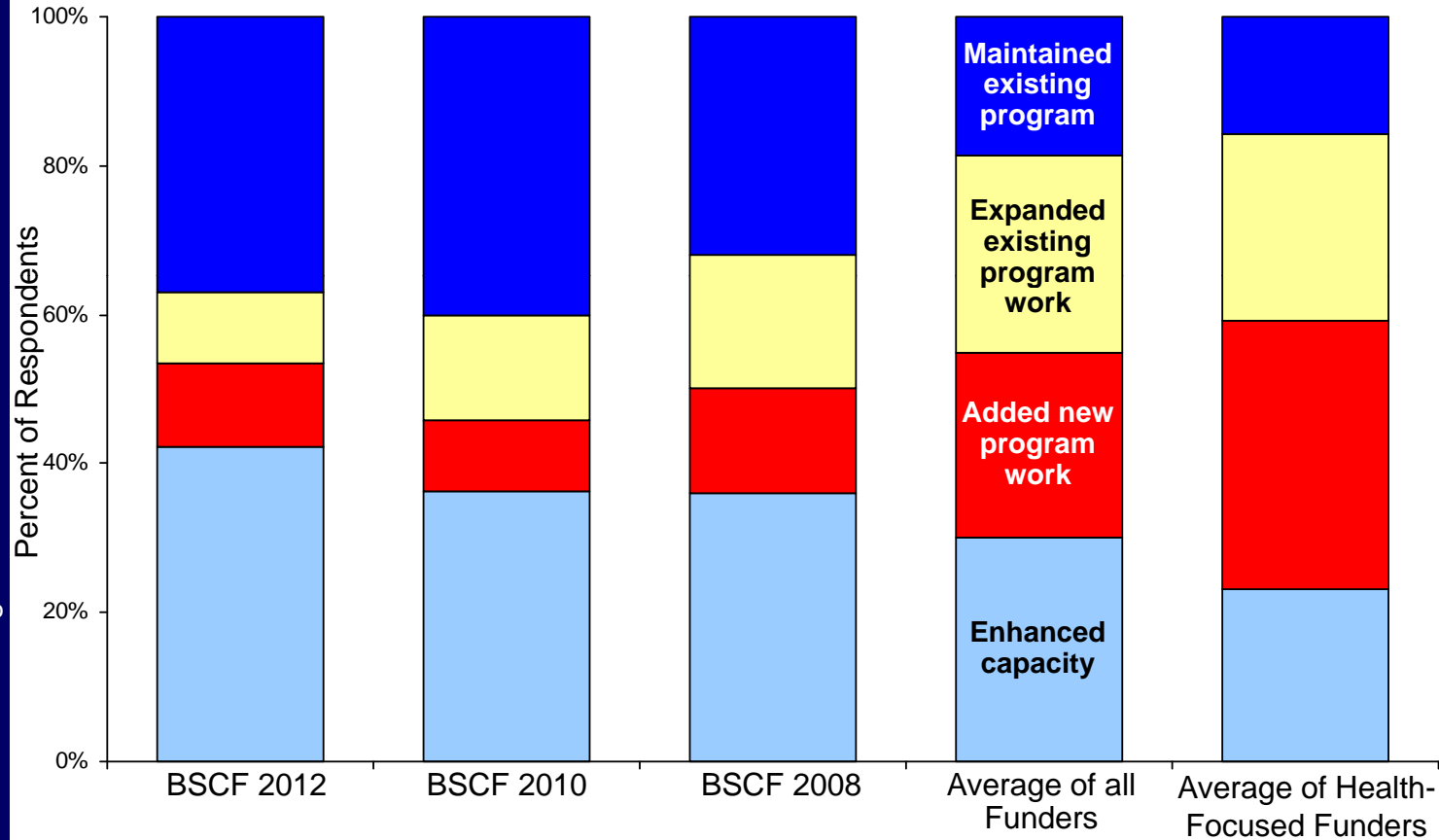
On the effect of the Foundation's funding on grantees' ability to sustain the work funded by the grant in the future, BSCF is rated:

- below 57 percent of funders
- above 75 percent of health-focused funders in the cohort



Grant Effect

Primary Effect of Grant on Grantee's Organization



BSCF Analysis – Variation by Primary Effect of Grant

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

Grantees that received grants that primarily enhanced capacity rate significantly higher than do other grantees on:

- ◆ Impact on and understanding of grantees' fields
- ◆ Impact on grantees' local communities
- ◆ Understanding of grantees' goals and strategies
- ◆ Impact on grantees' organizations
- ◆ Impact on the sustainability of the work funded by the grant
- ◆ Quality of the funder/grantee relationship
- ◆ Comfort approaching the Foundation
- ◆ Responsiveness of the Foundation's staff

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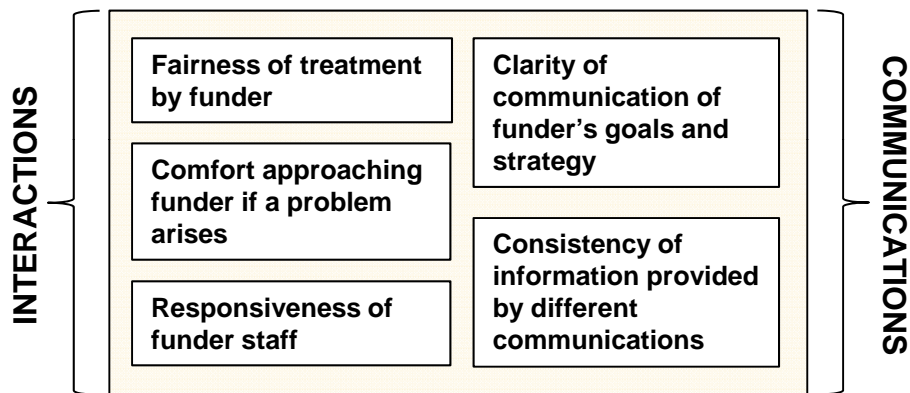
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Funder-Grantee Relationships Summary

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

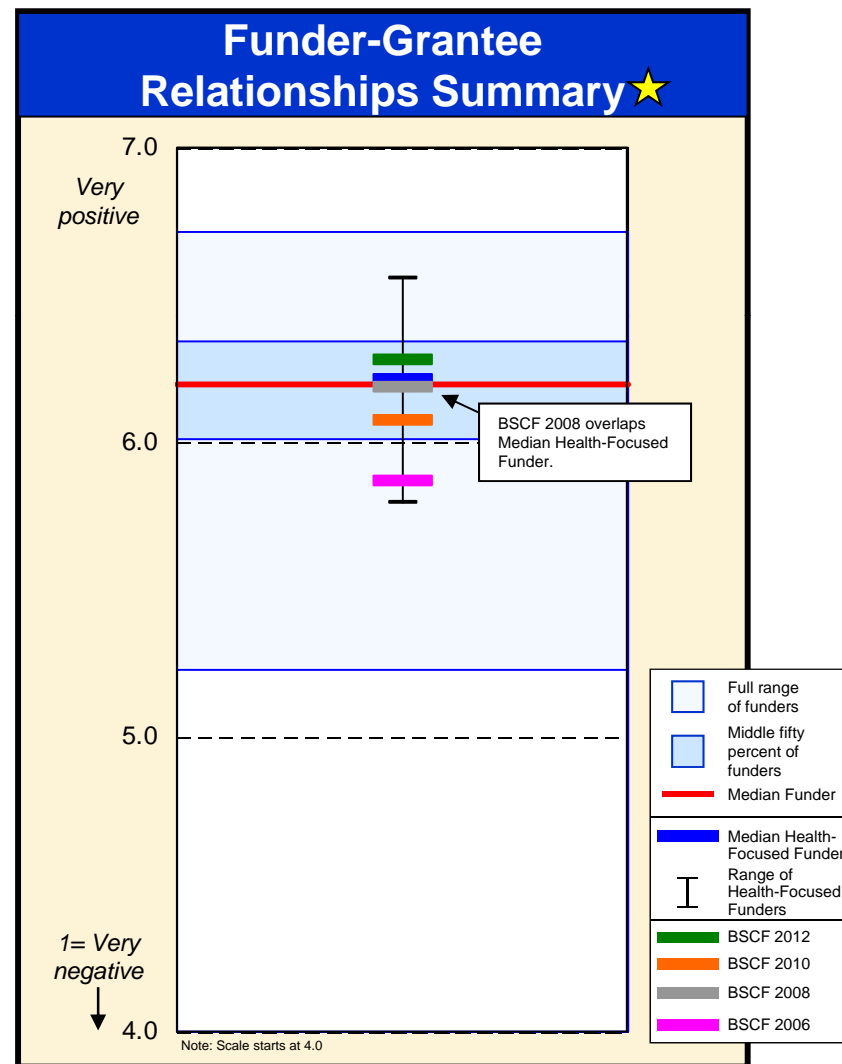
- above 65 percent of funders
- above 81 percent of health-focused funders in the cohort

Key Components of Funder-Grantee Relationships Measure



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

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



Interactions Measures

On fairness of treatment of grantees, BSCF is rated:

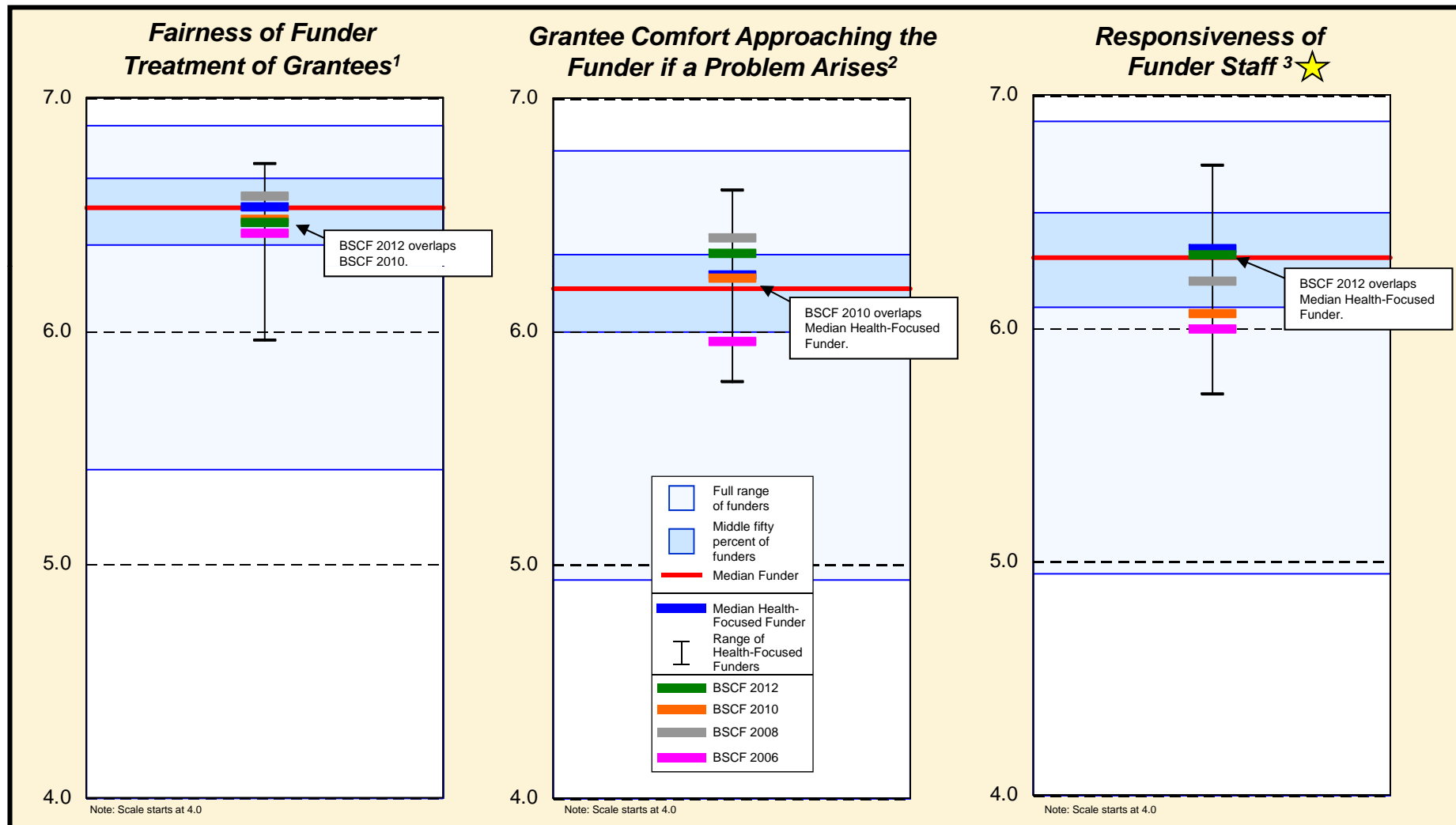
- below 61 percent of funders
- below 76 percent of health-focused funders in the cohort

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

- above 75 percent of funders
- above 76 percent of health-focused funders in the cohort

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

- above 51 percent of funders
- below 59 percent of health-focused funders in the cohort



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 2012 rating is significantly higher than BSCF 2010 rating at a 90 percent confidence interval.

Selected Grantee Comments

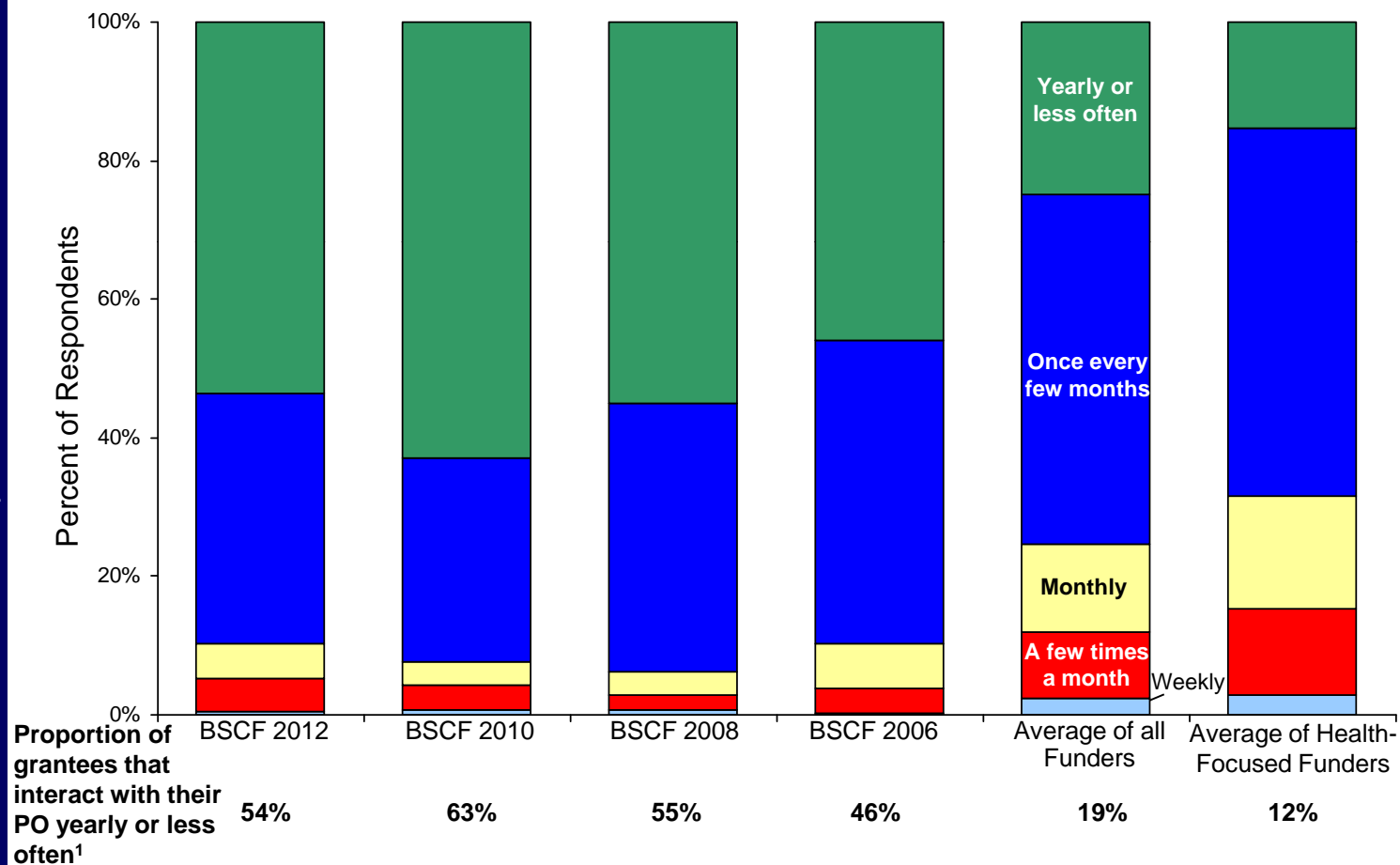
- ♦ *"I was disappointed because staff did not get back to us with the info that we asked for even after several phone calls were made to that individual."*
- ♦ *"We have found our interactions and communications with BSCF staff to be very clear. They have been responsive to our questions and concerns in a timely manner. The feeling is that they are working as advocates within the Foundation to help applicants get the best possible review."*
- ♦ *"Every communication our grant team has with BSCF is positive, solution-oriented and supportive. BSCF staff routinely makes themselves available and express their desire to be viewed as a partner vs. a 'grantor.'"*
- ♦ *"Staff is always very responsive to assist us with any questions or concerns we may have in regards to a grant proposal or evaluation report. They are very helpful and go the extra mile to ensure our questions and concerns are addressed."*
- ♦ *"BSCF does its work in a high touch, high listening, focused, and flexible way."*
- ♦ *"There are very friendly, well-trained, and responsive people. They are always a pleasure to work with."*

Frequency of Interactions

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

- larger than that of 90 percent of funders
- larger than that of all other health-focused funders in the cohort

Frequency of Grantee Contact with Program Officer During Grant



BSCF Analysis – Variation by Frequency of Interaction

BSCF grantees rate differently based on the frequency with which they interact with their program officer.

Grantees that interact with their program officer once every few months or more frequently rate significantly higher than do other grantees on:

- ◆ Understanding of grantees' local communities
- ◆ Fairness of Foundation's treatment of grantees
- ◆ Helpfulness of the selection process
- ◆ Helpfulness of the reporting and evaluation process

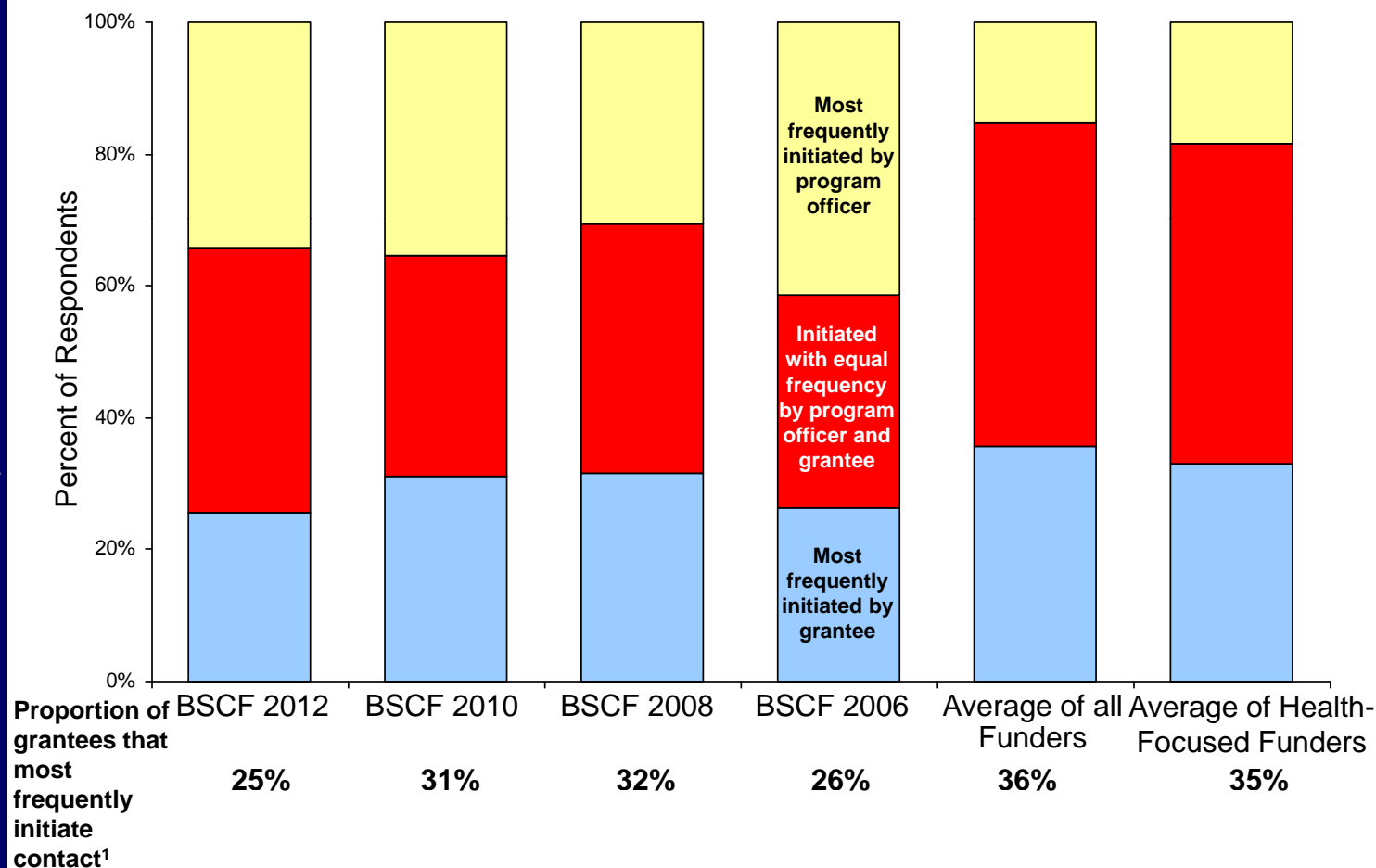
1: The proportion shown for "Average of all Funders" and "Average of Health-Focused Funders" is a median.

Initiation of Interactions

The proportion of BSCF grantees that reports that they most frequently initiate interactions with the Foundation is:

- smaller than that of 77 percent of funders
- smaller than that of 81 percent of health-focused funders in the cohort

Initiation of Grantee Contact with Program Officer During Grant



BSCF Analysis – Variation by Initiation of Interaction

BSCF grantees rate differently based on whether they are the party that most frequently initiates interactions with the Foundation.

Grantees that are most frequently the party that initiate interactions rate significantly lower than do other grantees on:

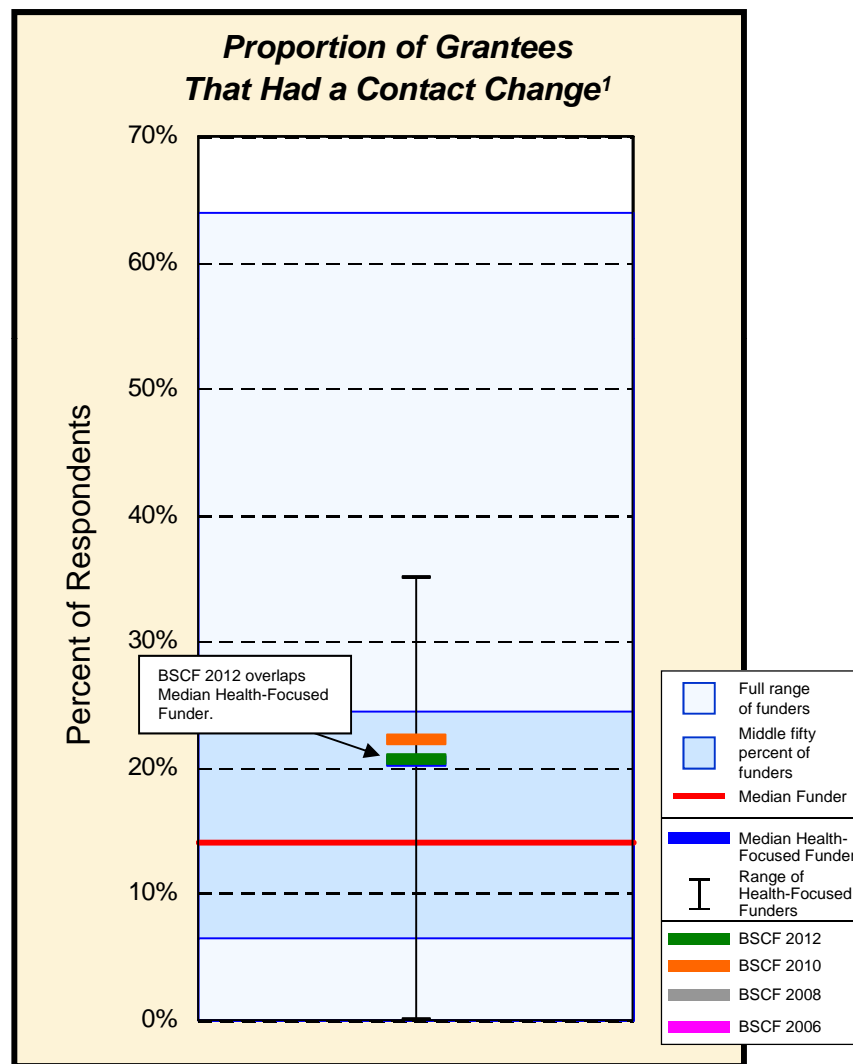
- ♦ Foundation’s advancement of knowledge in grantees’ fields
- ♦ Foundation’s impact on public policy in grantees’ fields

1: The proportion shown for “Average of all Funders” and “Average of Health-Focused Funders” is a median.

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 65 percent of funders
- larger than that of 55 percent of health-focused funders in the cohort



BSCF Analysis – Variation by Change in Primary Contact

BSCF grantees rate differently based on whether they experienced a change in their primary contact in the last six months.

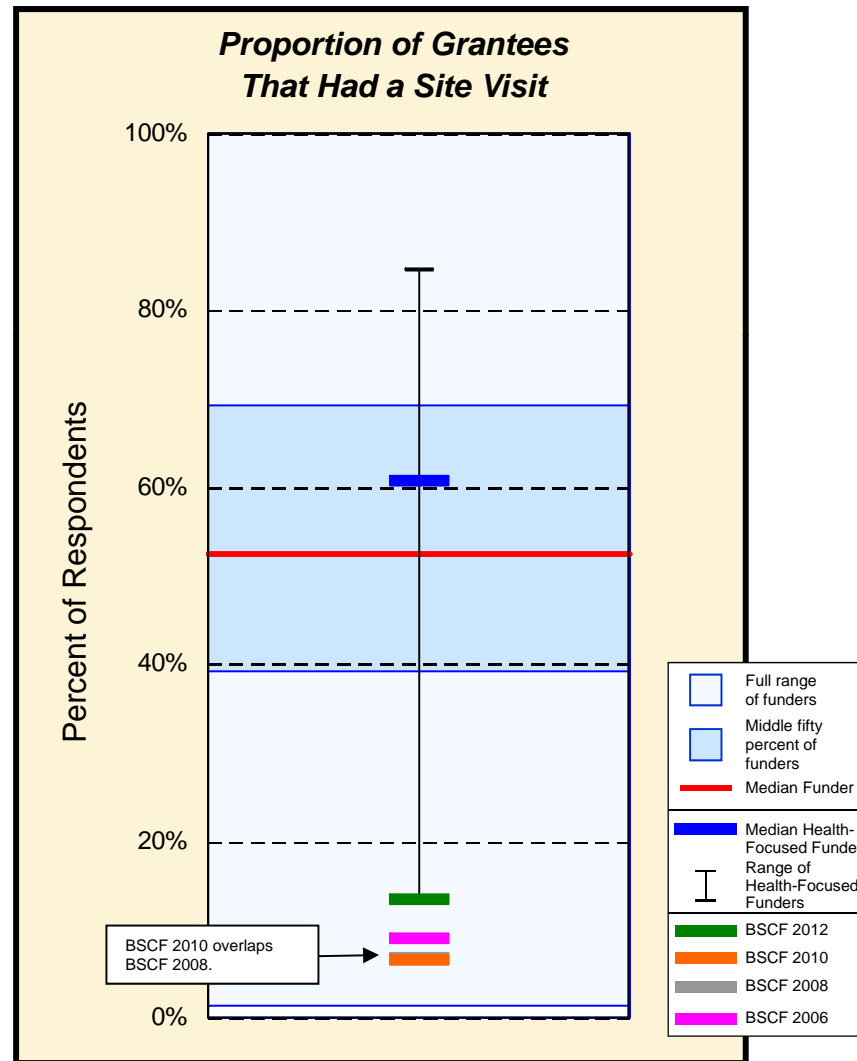
Grantees that experienced a contact change rate significantly lower than do other grantees on:

- ♦ Understanding of grantees' fields
- ♦ Impact on and understanding of grantees' local communities
- ♦ Understanding of grantees' goals and strategies

Proportion of Grantees That Had a Site Visit

The proportion of BSCF grantees receiving a site visit during the course of the grant is:

- smaller than that of 97 percent of funders
- smaller than that of all other health-focused funders in the cohort



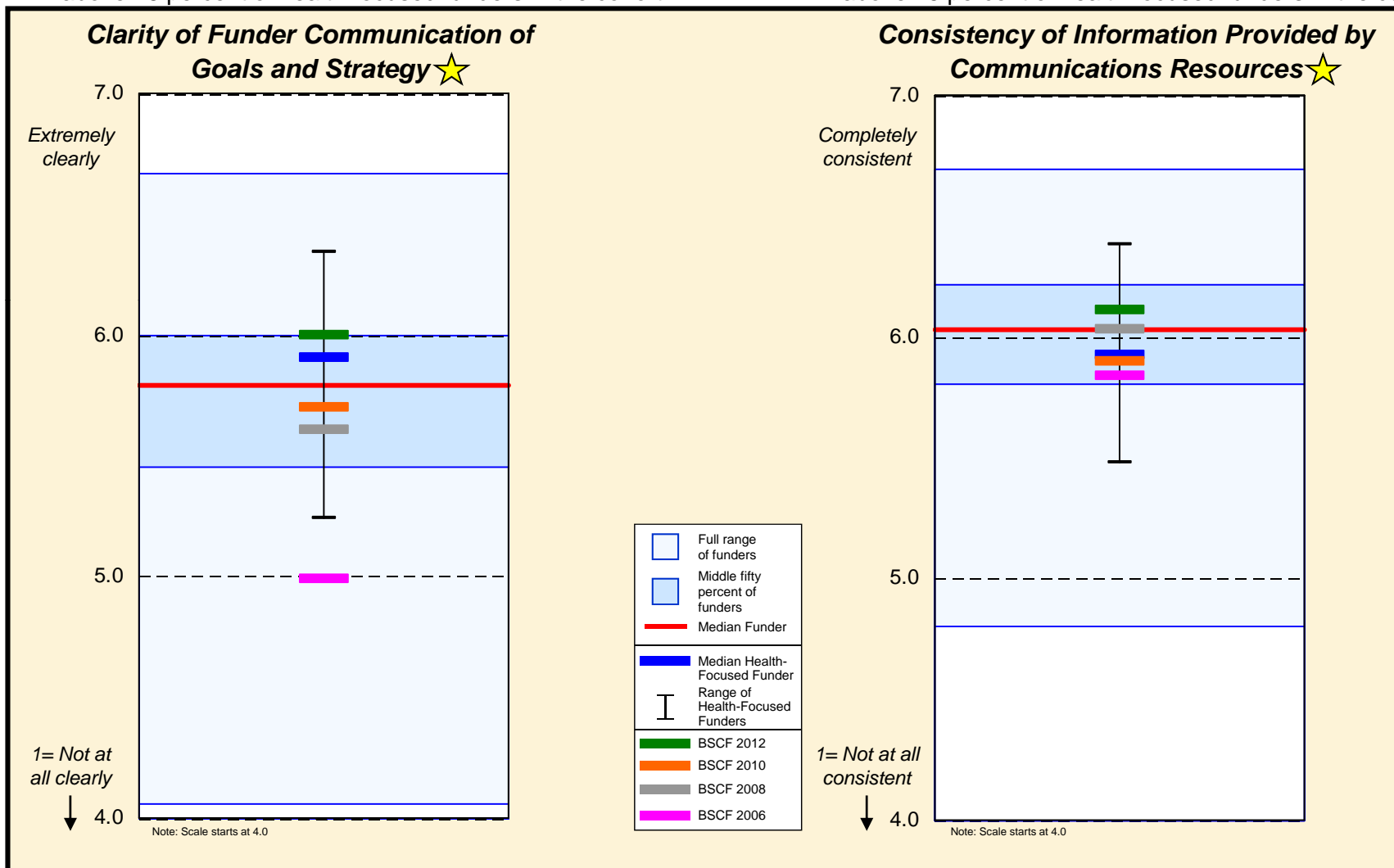
Communications Measures

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

- above 74 percent of funders
- above 76 percent of health-focused funders in the cohort

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

- above 62 percent of funders
- above 75 percent of health-focused funders in the cohort



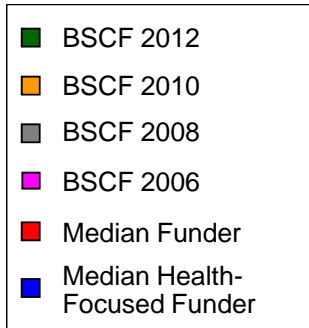
Note: In the right-hand chart, this question includes a “used one or no resources” response option; 5 percent of BSCF 2012 respondents indicated they had used one or no resources, compared to 4 percent at the median funder, 4 percent of BSCF 2010 respondents, 7 percent of BSCF 2008 respondents, 13 percent of BSCF 2006 respondents, and 2 percent of respondents at the median health-focused funder.

★ = BSCF 2012 rating is significantly higher than BSCF 2010 rating at a 90 percent confidence interval.

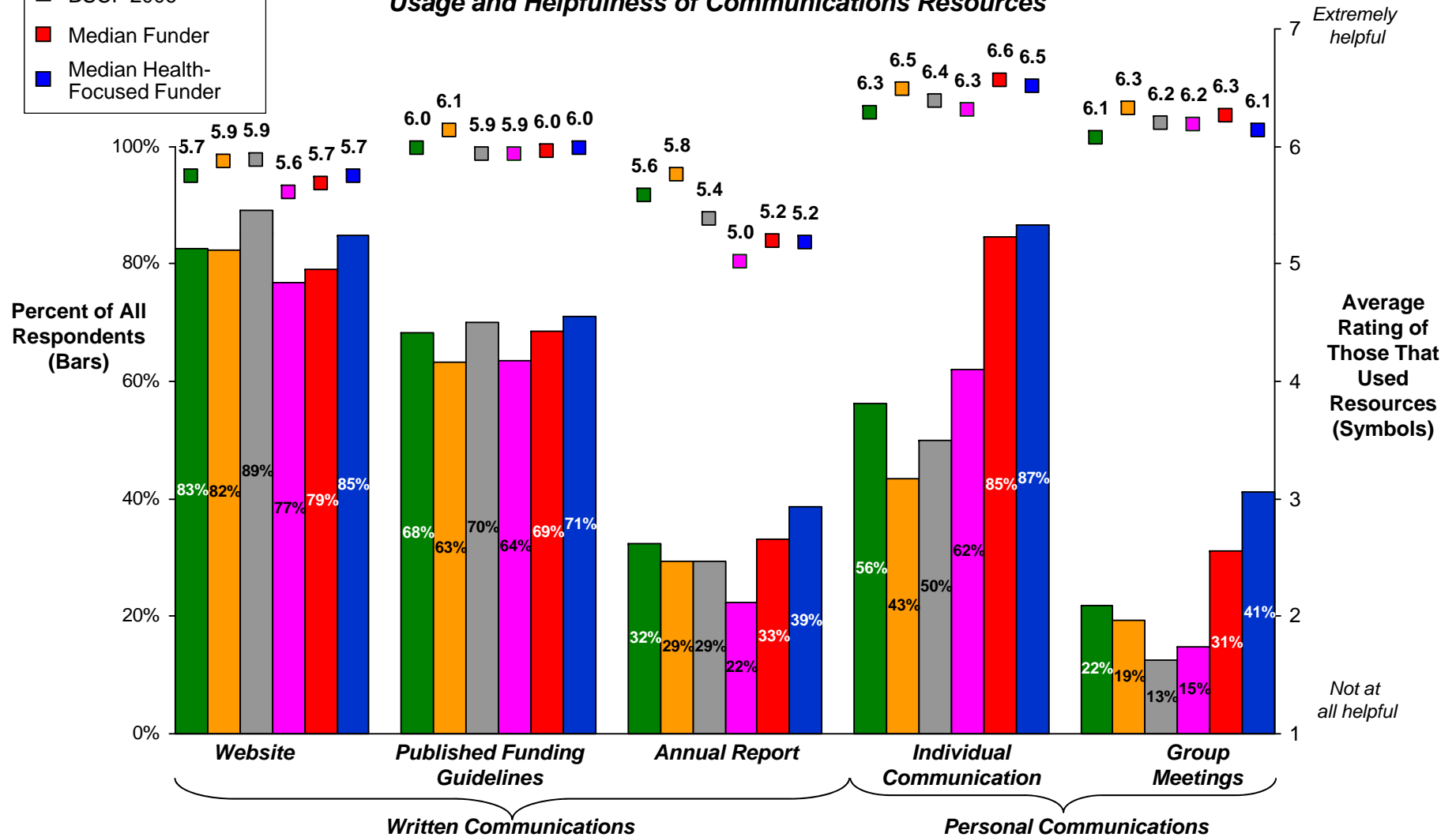
Selected Grantee Comments

- ♦ *“They communicate very clearly about their goals, and are very interested in both keeping up with new research and information on the field, and in disseminating it through trainings.”*
- ♦ *“There have been a number of staffing adjustments over the past eight months and this has created some confusion/conflict in communications and direction. It is at times difficult to know with whom to communicate and what information to use as a guide.”*
- ♦ *“While they have proven a commitment to supporting DV work by granting millions of dollars to the field, I am unclear about some of their bigger picture strategies and who and how they engage grantees.”*
- ♦ *“They have very effective communications to us the grantees and it is always clear and concise whenever something is required of us.”*
- ♦ *“The communication with BSCF's staff was always clear and explained the process in a way that requires little if any follow up explanation. This is one of the easiest funders we work with in terms of the process.”*

Communications Resources



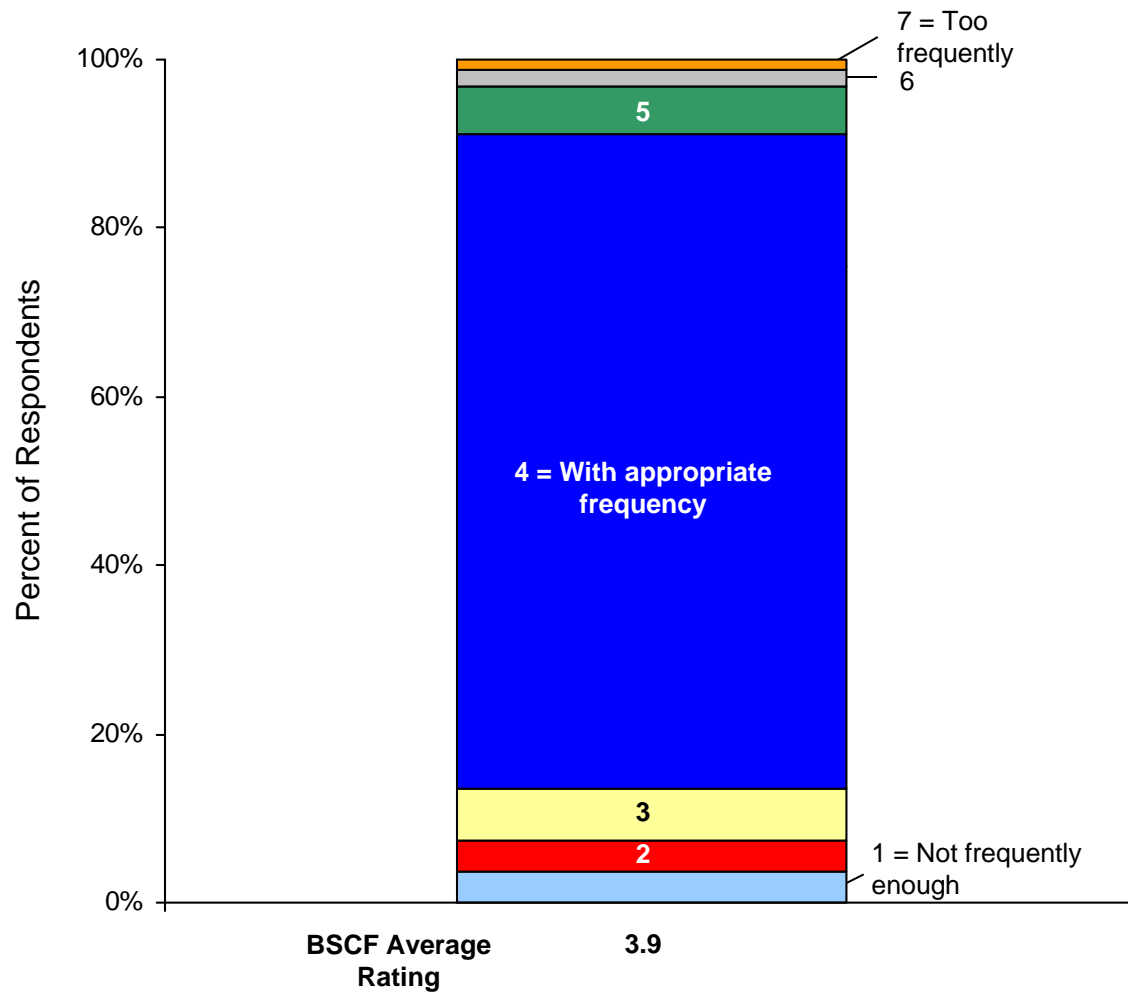
Usage and Helpfulness of Communications Resources



Frequency of Communication

BSCF grantees were asked to indicate how frequently the Foundation provides information about its work, with 1 = “Not frequently enough,” 4 = “With appropriate frequency,” and 7 = “Too frequently.”

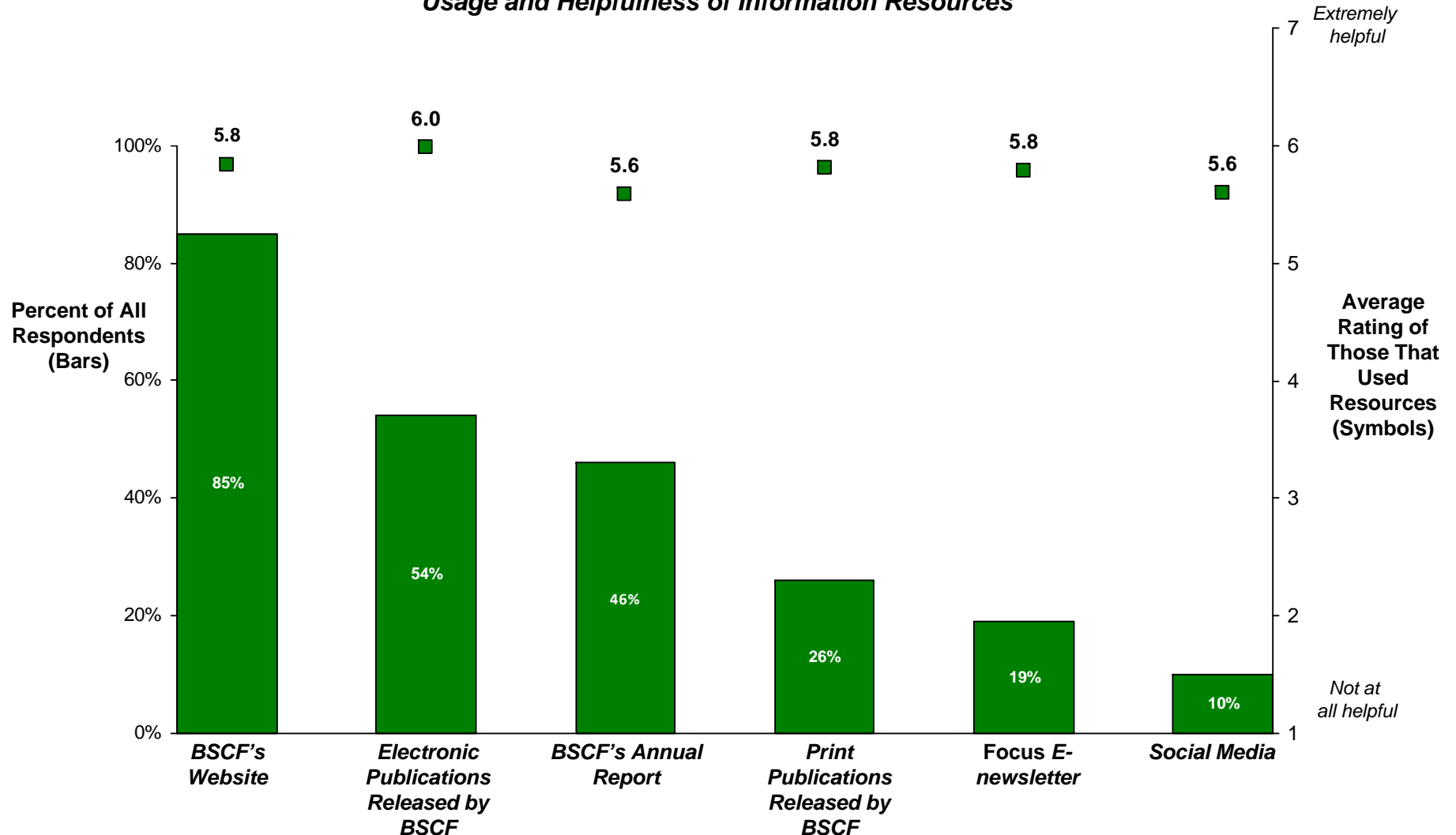
“How frequently does the Foundation provide information about its work to you”



Information Resources

BSCF grantees were asked to indicate whether they had used certain resources to get information on program activities from BSCF. They were also asked to rate the helpfulness of these resources, with 1 = “Not at all helpful,” and 7 = “Extremely helpful.” Grantees report most frequently using BSCF’s website to get information on program activities.

Usage and Helpfulness of Information Resources



Note: No comparative data is available because the question was only asked of BSCF grantees. Four percent of grantees indicated that they “Don’t know where to get this type of information.”

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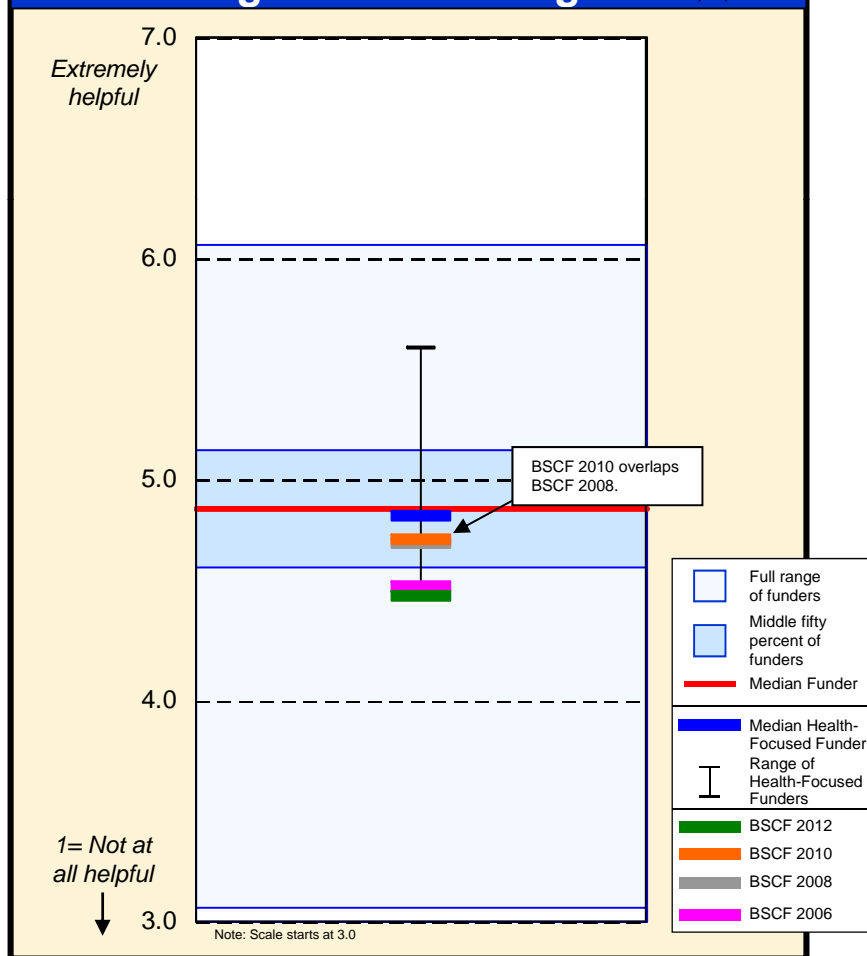
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Helpfulness of Selection Process

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

- below 83 percent of funders
- lower than all other health-focused funders in the cohort

Helpfulness of the Selection Process to Organizations/Programs ★



Selected Grantee Comments

- ◆ “Proposals and reports request very appropriate and important information, and yet do not require an insurmountable amount of grantee staff hours to complete.”
- ◆ “BSCF really gets what we do, unlike other funders.... They make the application easy because it's written for DV agencies with an understanding of how we work, and what our current needs are.”
- ◆ “The application is simple and does not really require communication with any staff. We receive an email inviting us to participate with log in information and we proceed on our own from there.”
- ◆ “The grant processes of BSCF are the most user-friendly of any foundation I have ever worked with. The application process is straightforward and easy. It doesn't require an undue amount of time and the on-line process is easy to navigate.”
- ◆ “While the funding is consistent and extremely helpful, I'm not sure that feedback by the agencies is really listened to by the funder. Several of us have been saying for years that we don't understand the funding formula established by BSCF..... A little more transparency in the funding formula would be helpful.”

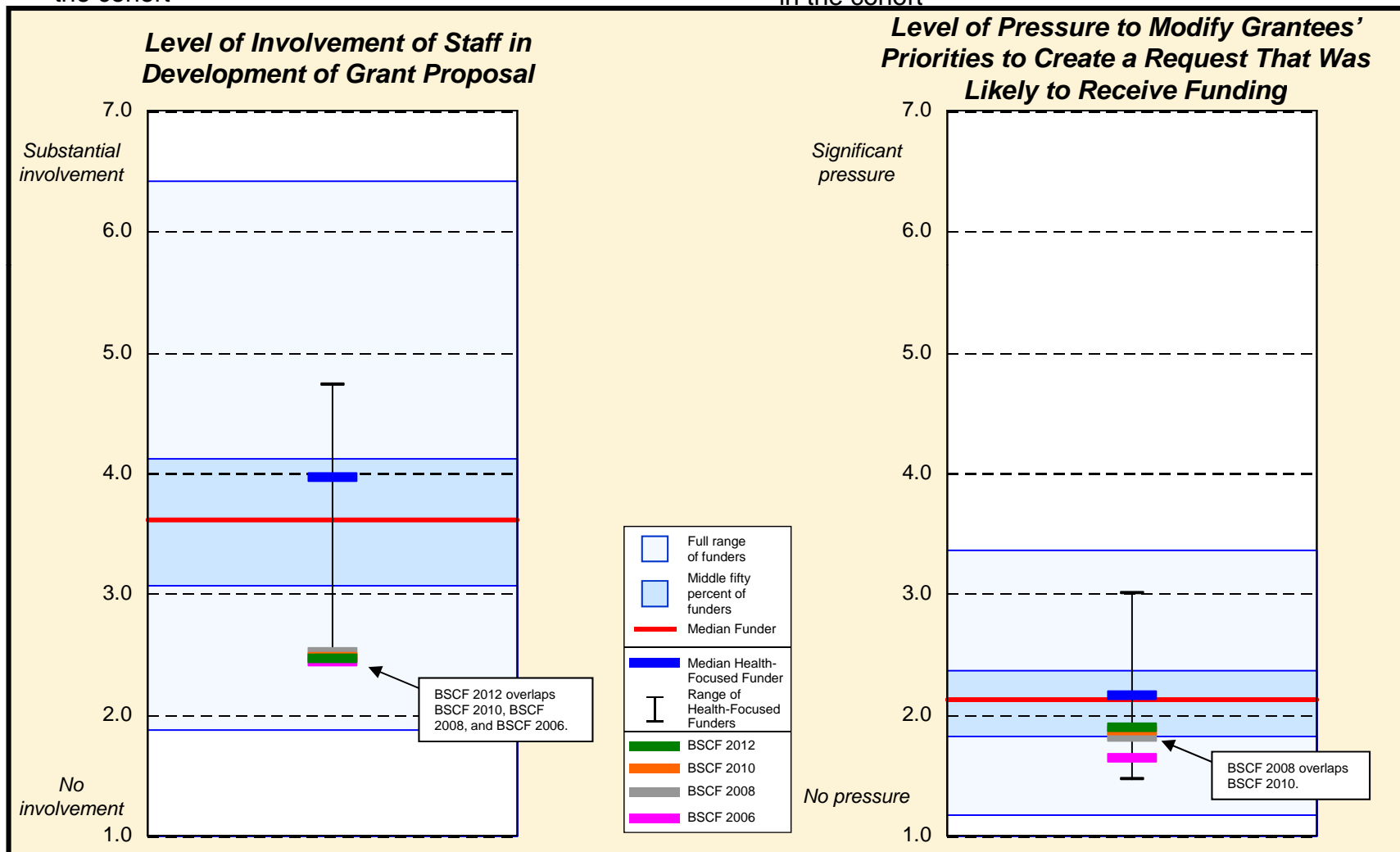
Funder Involvement and Pressure in Selection Process

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

- below 93 percent of funders
- lower than all other health-focused funders in the cohort

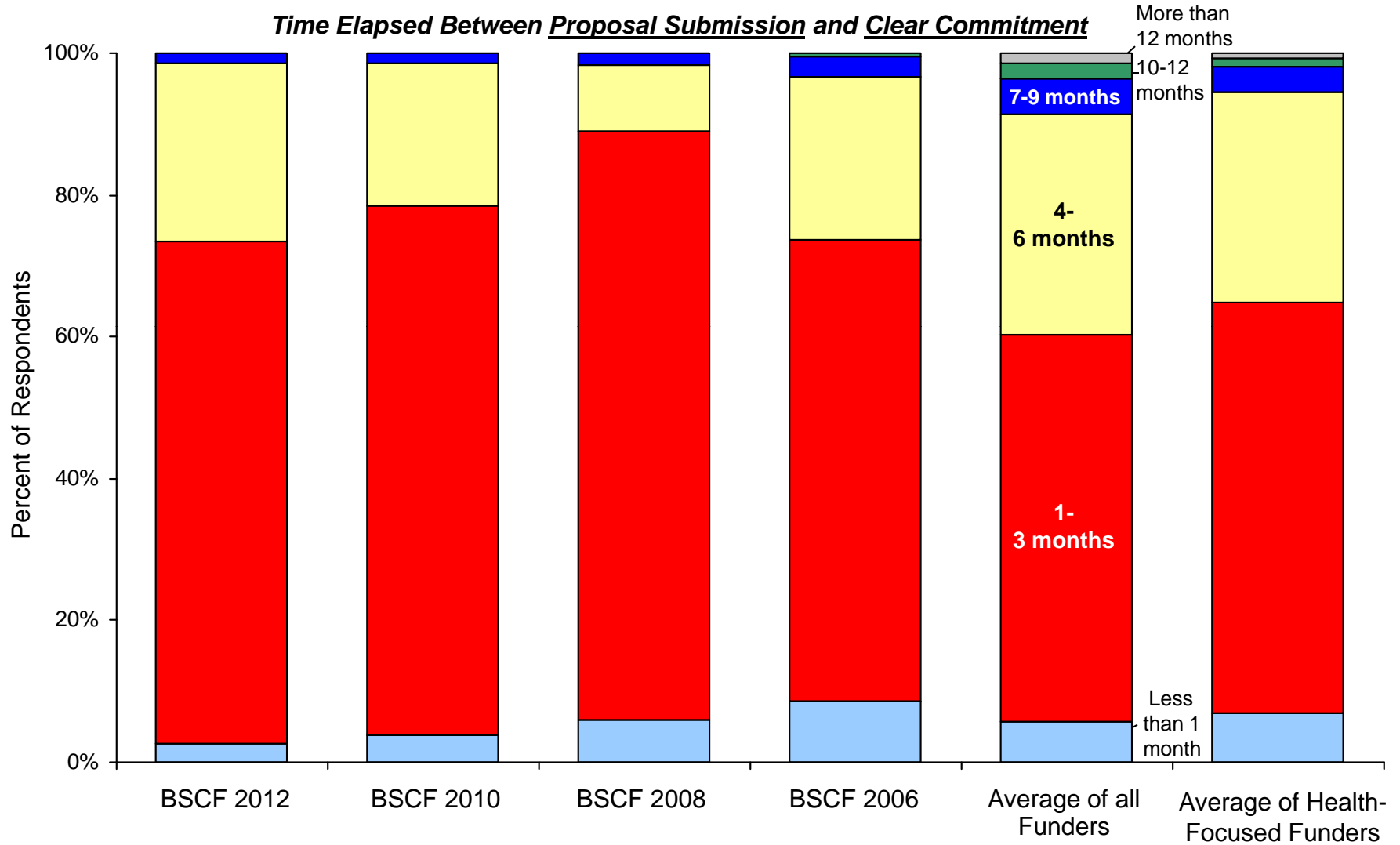
On the level of pressure grantees feel to modify their priorities to create a proposal that was likely to receive funding, BSCF is rated:

- below 68 percent of funders
- below 94 percent of health-focused funders in the cohort



Note: These questions were only asked of those grantees that had submitted a proposal for their grant by the time they took the survey. For BSCF 2012, 96 percent of grantees indicated they submitted a proposal for their grant by the time they took the survey, compared to 95 percent at the median funder, 94 percent of BSCF 2010 respondents, 96 percent of BSCF 2008 respondents, 91 percent of BSCF 2006 respondents, and 95 percent of respondents at the median health-focused funder.

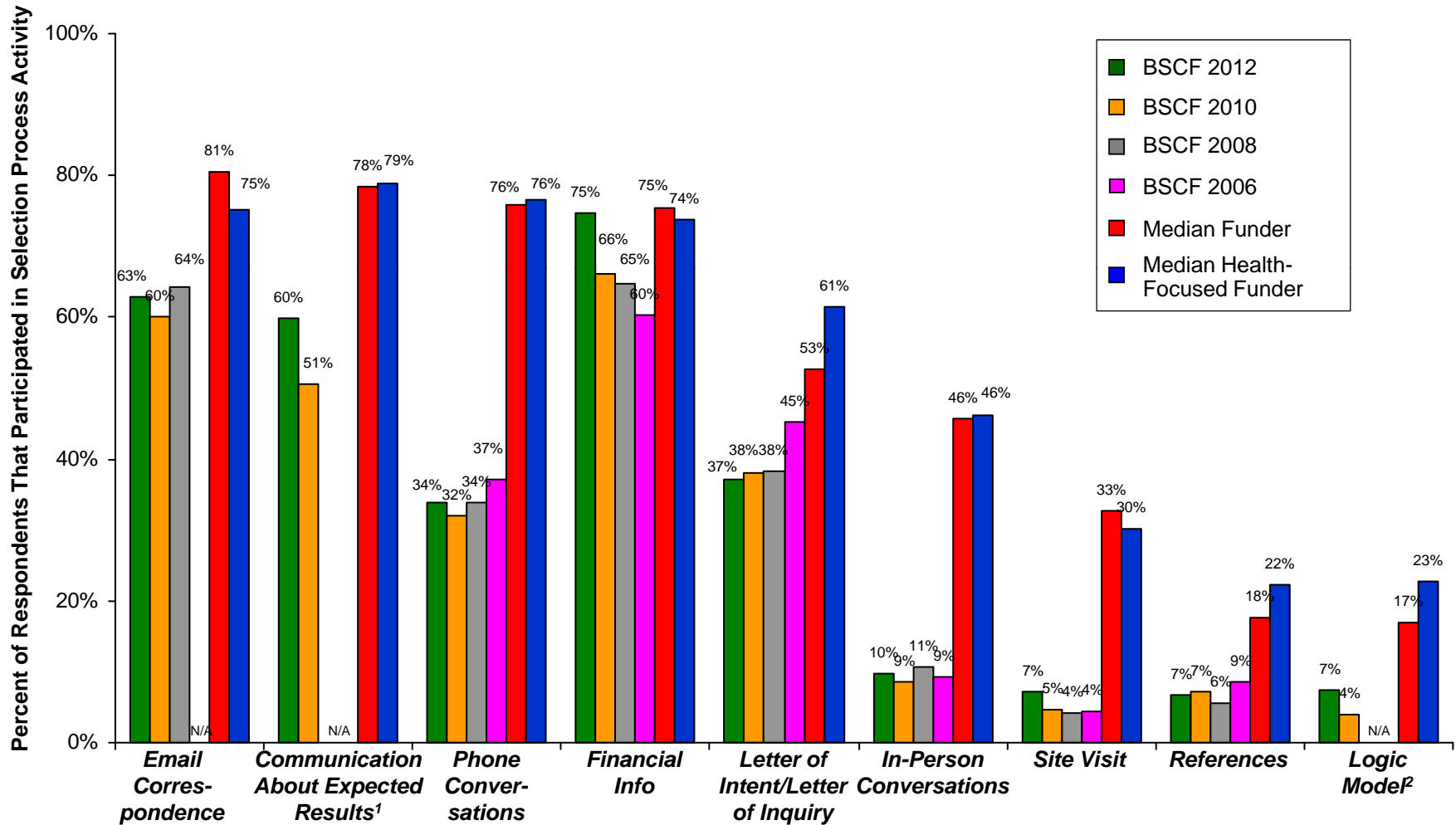
Time Between Submission and Clear Commitment



Note: This question was only asked of those grantees that had submitted a proposal for their grant by the time they took the survey. For BSCF 2012, 96 percent of grantees indicated they submitted a proposal for their grant by the time they took the survey, compared to 95 percent at the median funder, 94 percent of BSCF 2010 respondents, 96 percent of BSCF 2008 respondents, 91 percent of BSCF 2006 respondents, and 95 percent of respondents at the median health-focused funder.

Selection Process Activities

Selection Process Activities



Note: BSCF 2006 data on "Email Correspondence," "Communication About Expected Results," and "Logic Model" and BSCF 2008 data on "Communication About Expected Results" and "Logic Model" not available due to changes to the survey instrument.

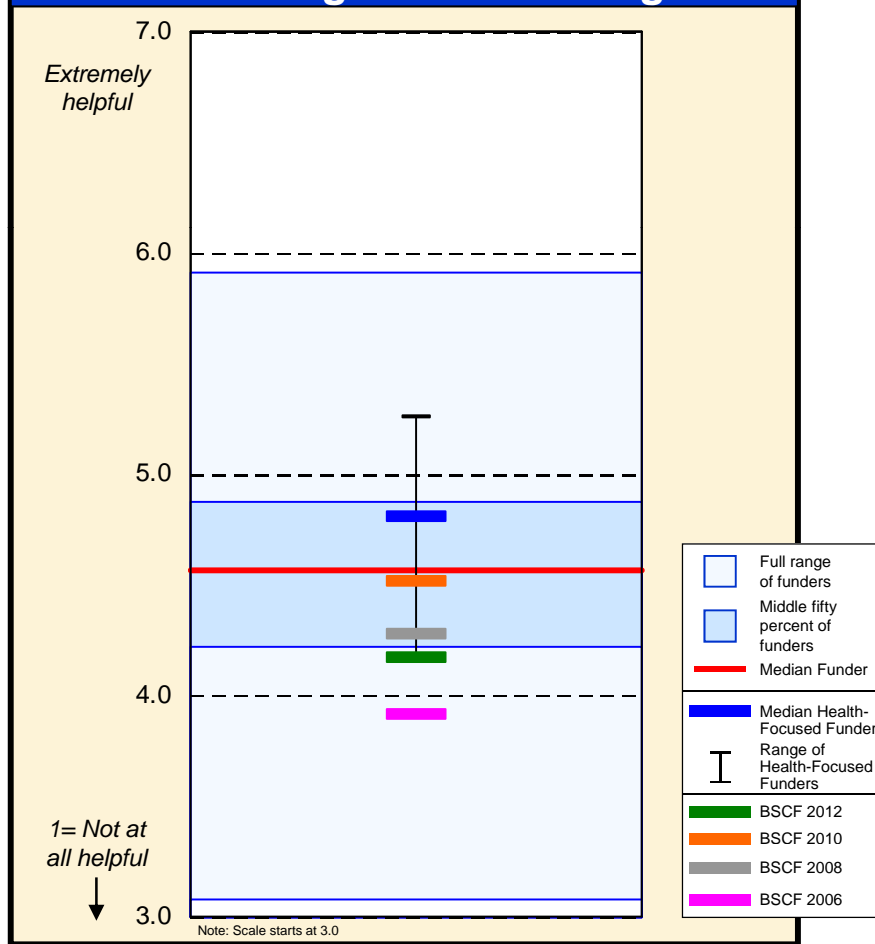
1: Represents data from 91 funders.
2: Represents data from 78 funders.

Helpfulness of Reporting and Evaluation Processes

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

- below 80 percent of funders
- lower than all other health-focused funders in the cohort

Helpfulness of Reporting/Evaluation Process to Organizations/Programs



Selected Grantee Comments

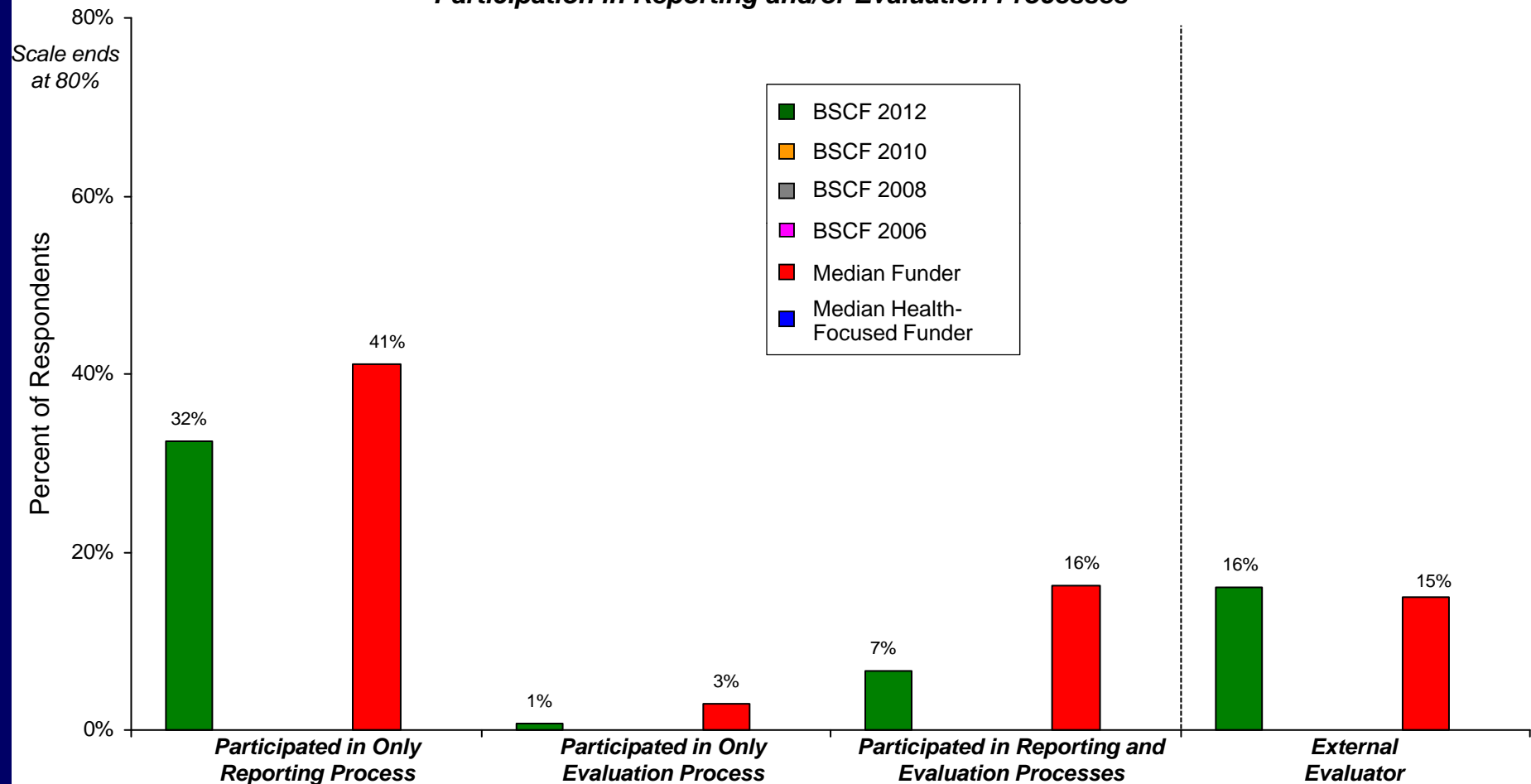
- ♦ “Very professional and efficient reporting process.”
- ♦ “Even though [the reporting process] was far more complicated this last year than in previous years, it was still a fairly easy process. Additionally, our organization learned a considerable amount of information that was revealed during the reporting process, making it very valuable to our planning process.”
- ♦ “The reporting process is also very simple and online submission of grant application and report is a big plus.”
- ♦ “The Foundation makes it very easy to apply and to report on outcomes.”

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 2012, 40 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, 53 percent of BSCF 2010 respondents, 55 percent of BSCF 2008 respondents, 83 percent of BSCF 2006 respondents, and 70 percent of respondents at the median health-focused funder.

Reporting and Evaluation Processes

BSCF grantees were asked if they participated in or will participate in the Foundation's reporting and/or evaluation processes. Of those grantees that did participate in one or both processes, a smaller than typical proportion participated in both a reporting and evaluation process.

Participation in Reporting and/or Evaluation Processes



Note: For BSCF 2012, 60% percent of grantees reported that a reporting/evaluation process had not occurred at the time of the survey. BSCF 2010, BSCF data, BSCF 2006, and health-focused funder data not available due to changes to the survey instrument. This chart represents data from 74 funders.

Discussion of Report or Evaluation

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

- smaller than that of 89 percent of funders
- smaller than that of all other health-focused funders in the cohort

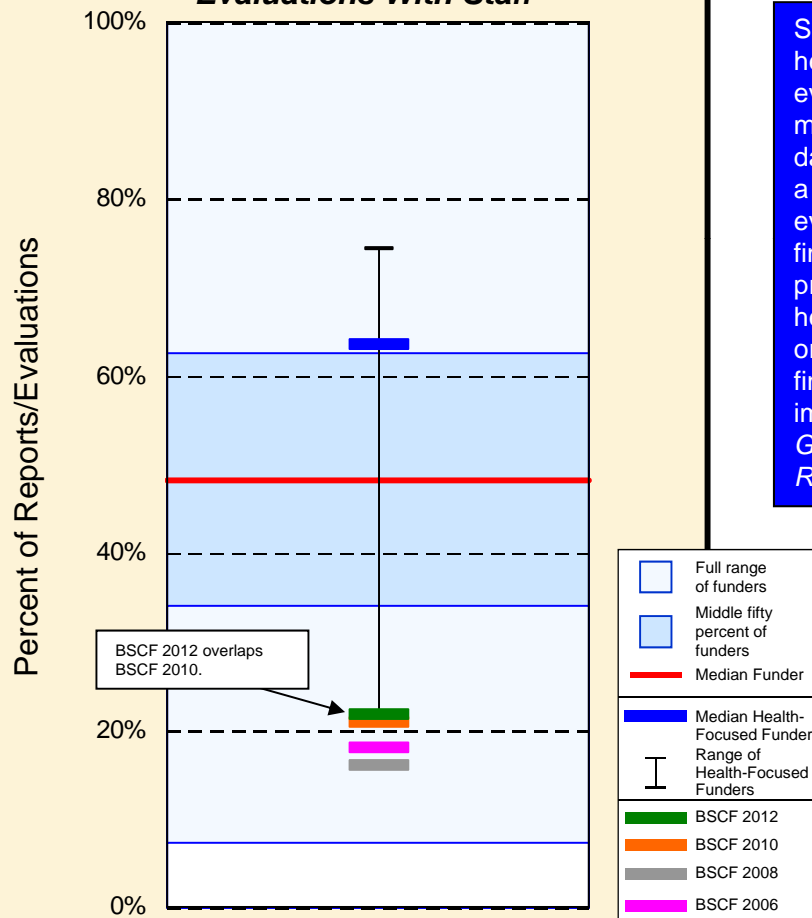
BSCF Analysis – Variation by Discussion of Completed Report or Evaluation

BSCF grantees rate differently based on whether or not they discussed their completed report or evaluation with staff.

Grantees that discussed their completed report or evaluation rate significantly higher than do other grantees on:

- ◆ Quality of the funder/grantee relationship
- ◆ Comfort approaching the Foundation
- ◆ Responsiveness of the Foundation’s staff
- ◆ Consistency of the Foundation’s communication resources

Percentage of Grantees That Report Discussing Completed Reports or Evaluations With Staff



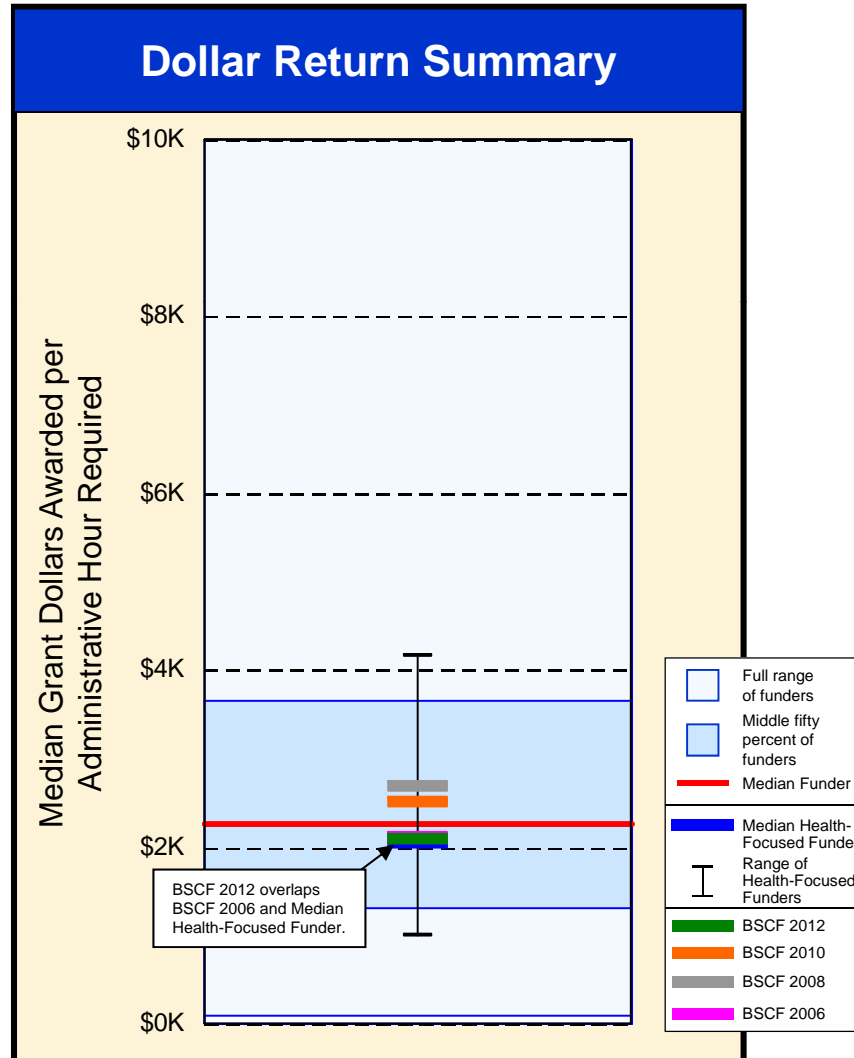
Survey-Wide Analysis Fact: The helpfulness of the reporting or evaluation process is the lowest rated measure by grantees in CEP's dataset. However, grantees who have a discussion about their reports or evaluations with their funder tend to find the reporting or evaluation process to be significantly more helpful in strengthening their organizations. For more on these findings and resulting management implications, please see CEP's report, *Grantees Report Back: Helpful Reporting and Evaluation Processes*.

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 2012, 40 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, 53 percent of BSCF 2010 respondents, 55 percent of BSCF 2008 respondents, 83 percent of BSCF 2006 respondents, and 70 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:

- less than that of 55 percent of funders
- greater than that of 56 percent of health-focused funders in the cohort



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 eleven funders whose Dollar Return on Grantee Administrative Hours exceeds \$10K.

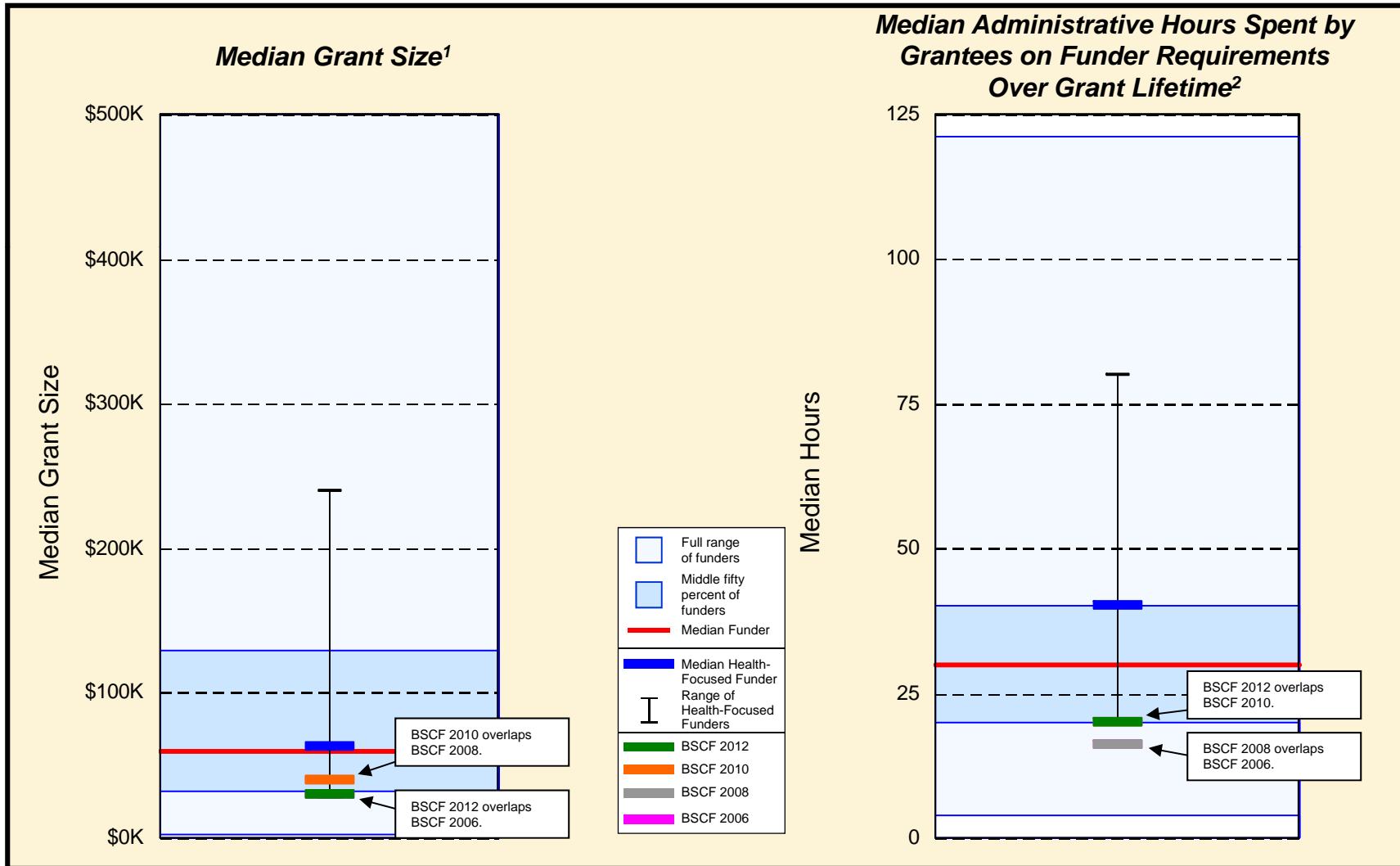
Grant Size and Administrative Time

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

- smaller than that of 77 percent of funders
- smaller than that of 94 percent of health-focused funders in the cohort

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 78 percent of funders
- less than the time spent by grantees of all other health-focused funders in the cohort



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

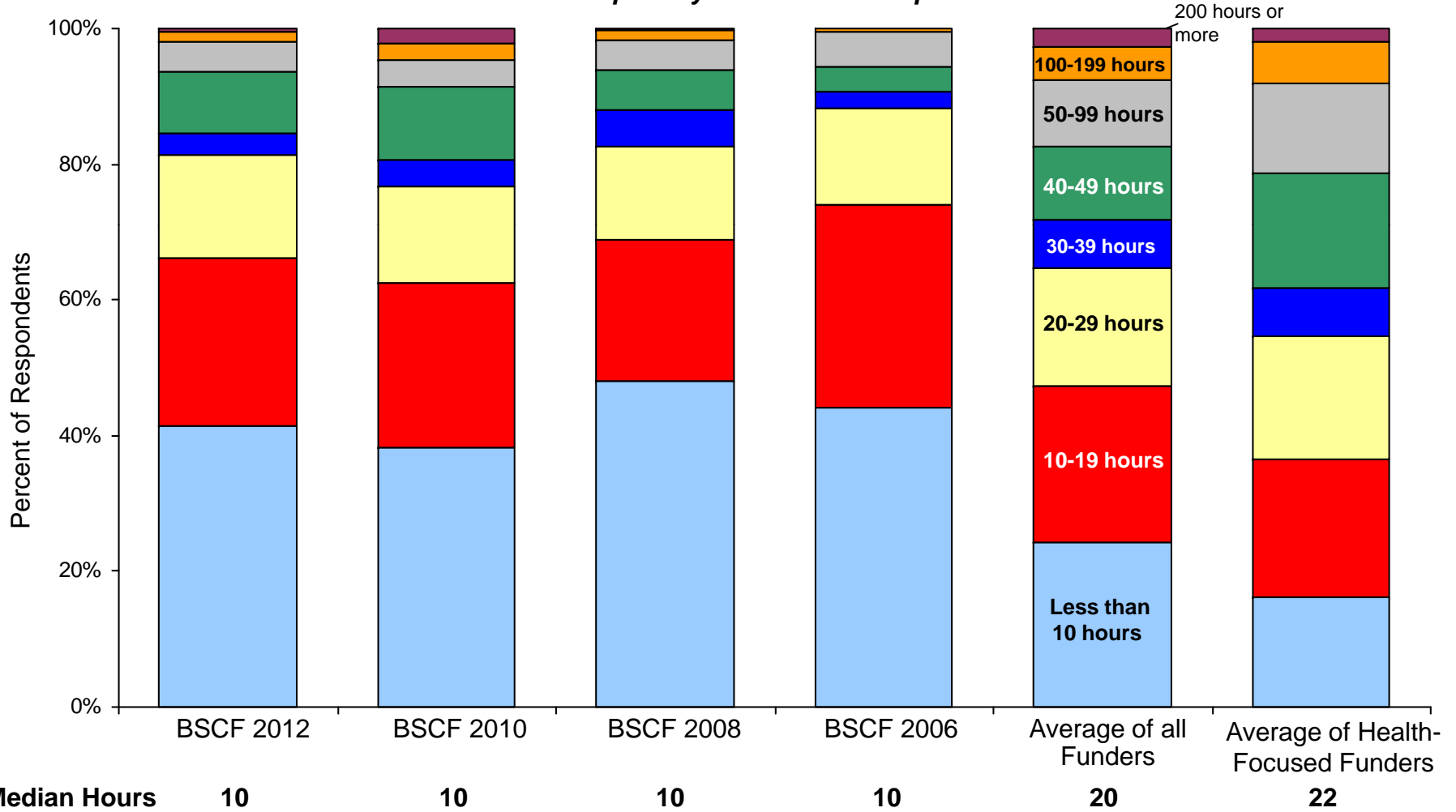
2: Chart displays total grant proposal creation, evaluation, and monitoring hours spent over the life of the grant; each of these events did not necessarily occur for each individual grantee. Chart does not show data from four funders whose median administrative hours exceed 125 hours.

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 90 percent of funders
- less than the time spent by grantees of all other health-focused funders in the cohort

Median Administrative Hours Spent by Grantees on Proposal and Selection Process

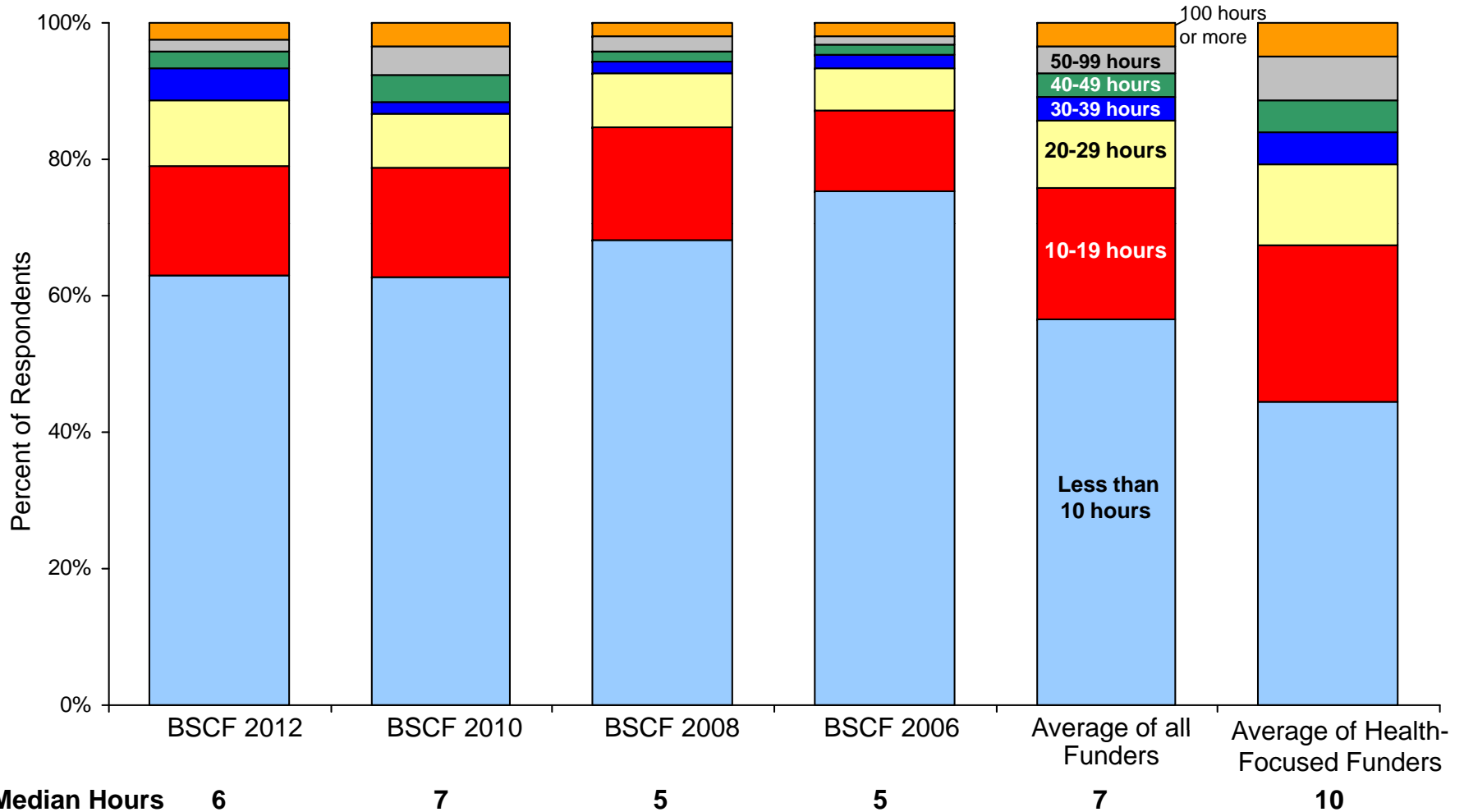


Administrative Time – Reporting and Evaluation Processes

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

- less than the time spent by grantees of 61 percent of funders
- less than the time spent by grantees of all other health-focused funders in the cohort

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

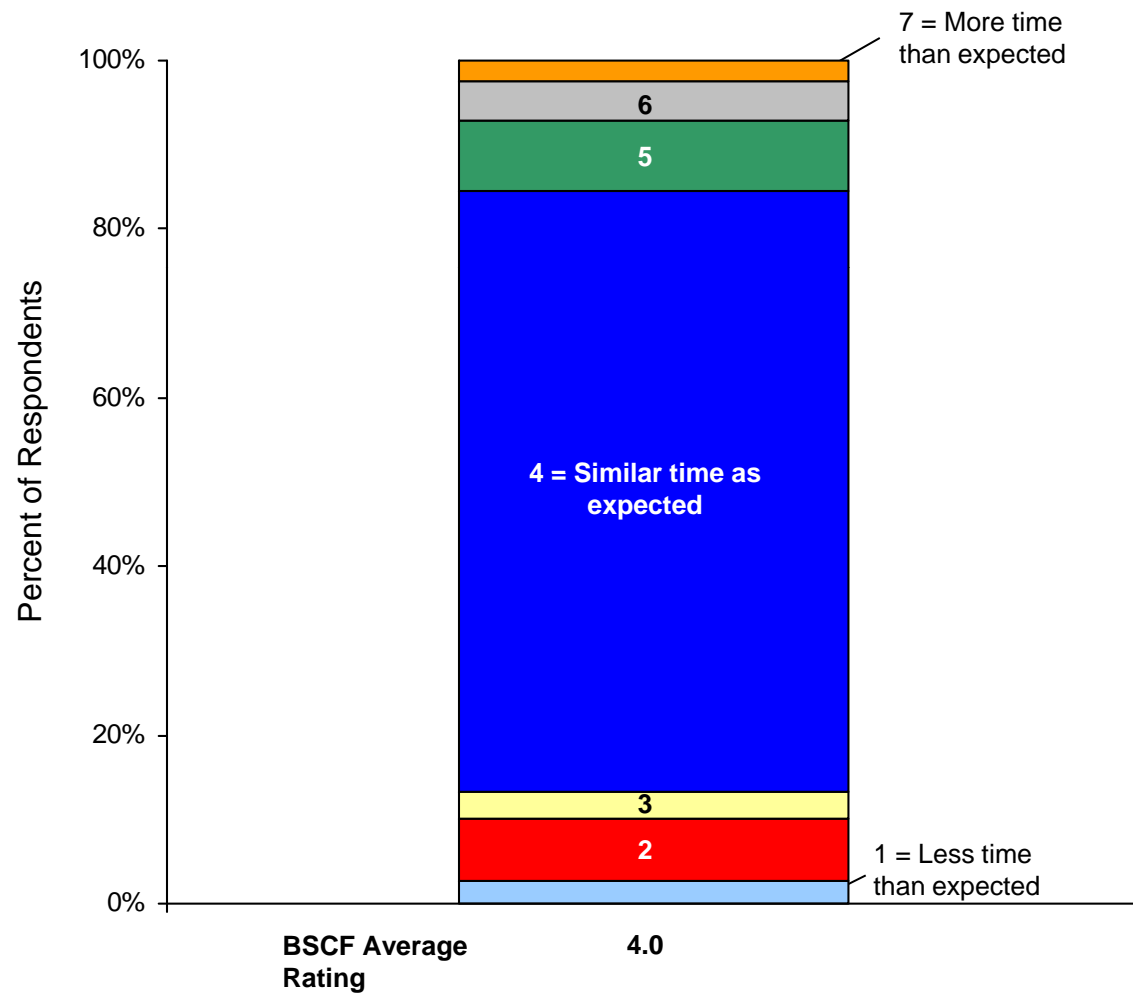


Note: "Evaluation" in the survey includes any activity considered by grantees to be part of an evaluation, and does not necessarily correspond to the Foundation's definition.

Time Requirements of Application Process

BSCF grantees were asked to indicate, compared to their expectations, how much time they needed to complete BSCF's application process, with 1 = "Less time than expected," 4 = "Similar time as expected," and 7 = "More time than expected."

"Please indicate how the time required to complete BSCF's application process compared to your expectations"

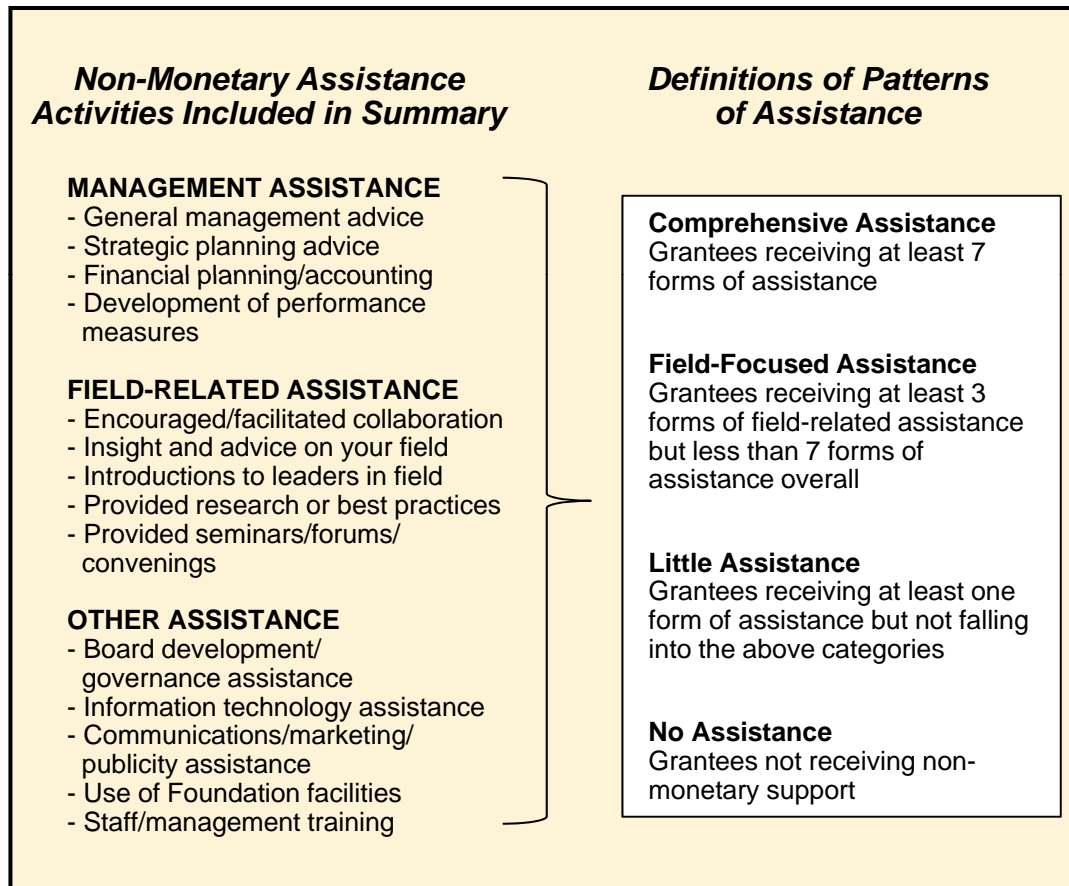


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Non-Monetary Assistance Summary (1)

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

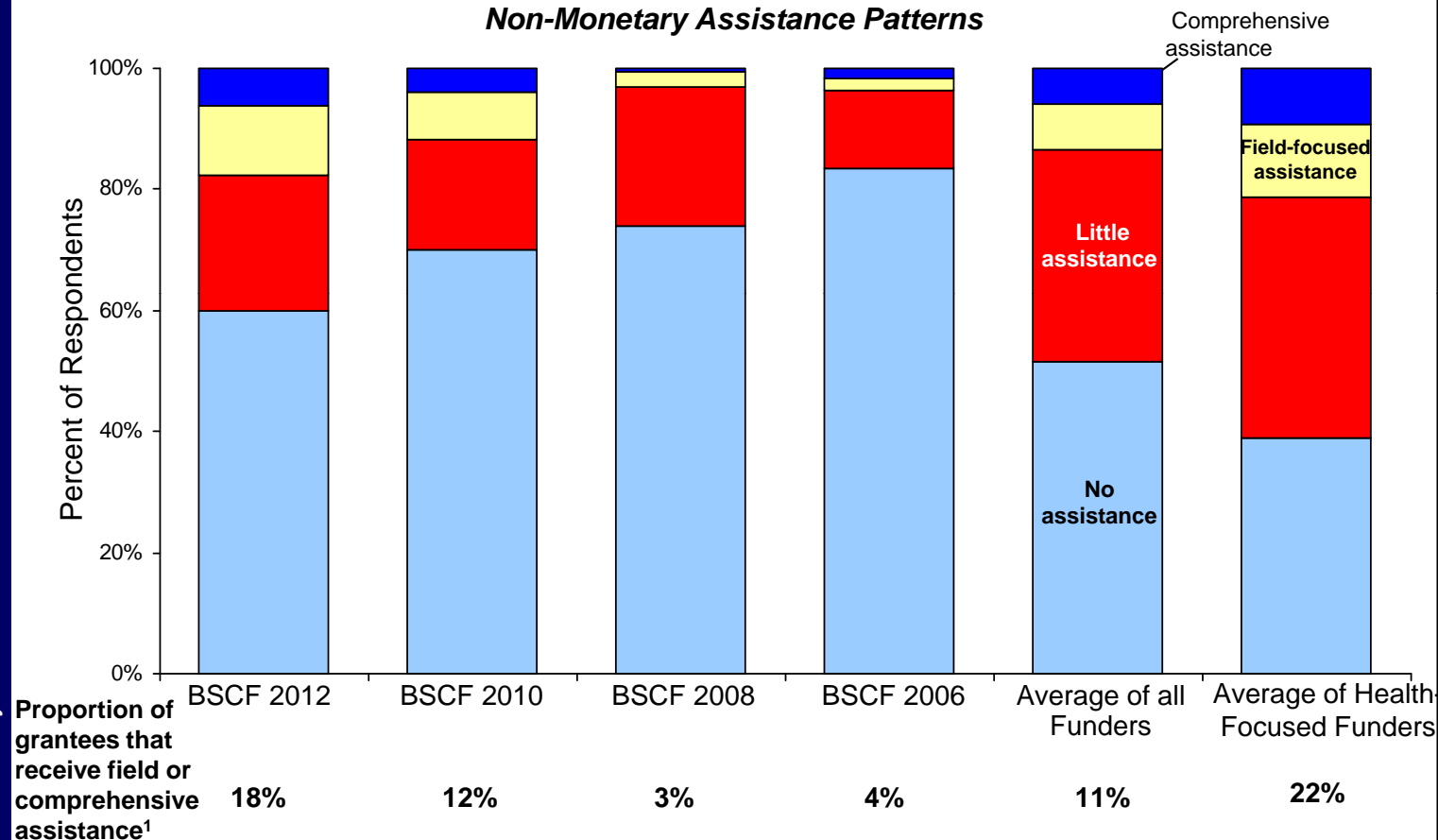
- ◆ *“I have had the opportunity to sit in on some of the informative Webinars – they are excellent. We are grateful to the many tools that are offered to us to help us serve those victims of domestic violence and their children.”*
- ◆ *“We especially appreciate all of the policy papers, studies, etc...frequently sent out by BSCF.”*
- ◆ *“I enjoy the regional meetings that are provided and the extra tech support that they have given over the years.”*
- ◆ *“I think [BSCF’s] publications/research aspect has really improved over the last few years, actually. [BSCF is] putting in effort to analyze relevant health care issues related to low-income populations, leadership development, etc.”*

Non-Monetary Assistance Summary (2)

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

- larger than that of 67 percent of funders
- smaller than that of 81 percent of health-focused funders in the cohort

Non-Monetary Assistance Patterns



BSCF Analysis – Variation by Non-Monetary Assistance

BSCF grantees rate differently based on the pattern of non-monetary assistance they have received.

Grantees that have received field-focused or comprehensive non-monetary assistance rate significantly higher than do other grantees on:

- ◆ Impact on and grantees’ fields
- ◆ Advancement of knowledge in grantees’ fields
- ◆ Impact on grantees’ organizations
- ◆ Impact on the sustainability of the work funded by the grant
- ◆ Quality of the funder/grantee relationship

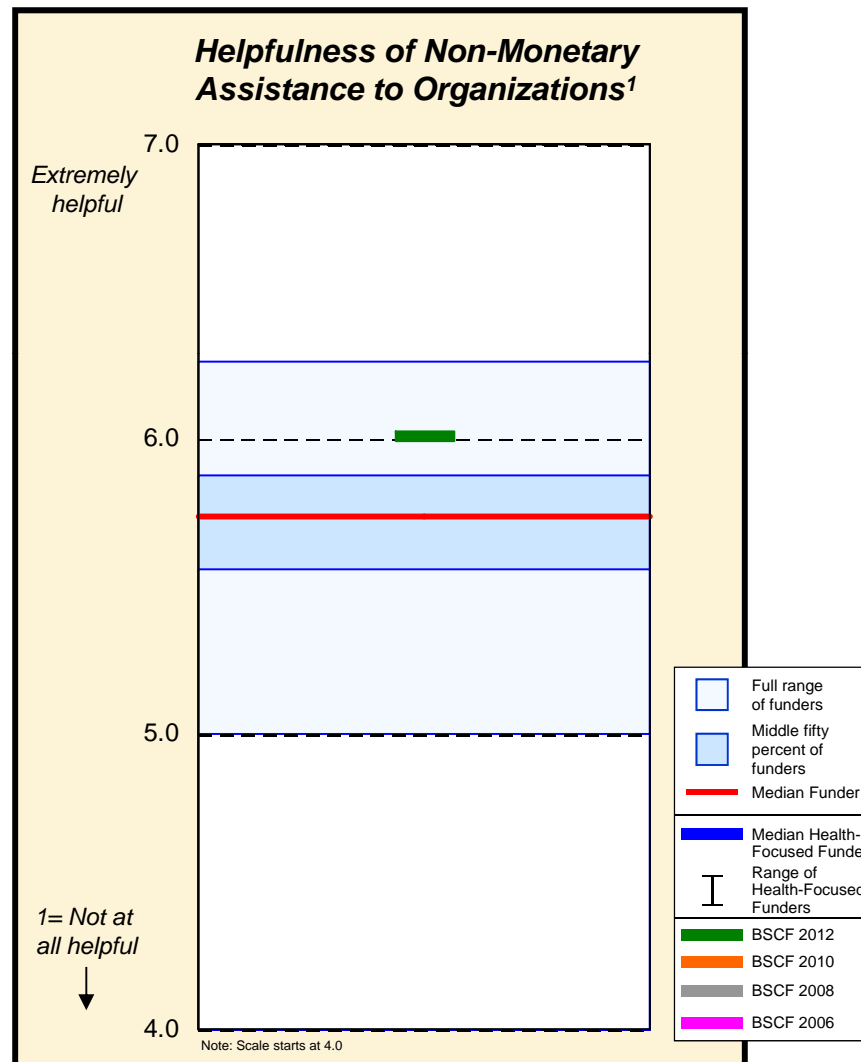
Survey-Wide Analysis Fact: Providing just two or three types of assistance appears to be ineffective; it is only when grantees receive either a comprehensive set of assistance activities or a set of mainly field-focused types of assistance that they have a substantially more positive and productive experience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

1: The proportion shown for “Average of all Funders” and “Average of Health-Focused Funders” is a median.

Helpfulness of Non-Monetary Assistance

On helpfulness of the non-monetary assistance provided by the Foundation in strengthening grantee organizations' work, BSCF is rated:

- above 88 percent of funders



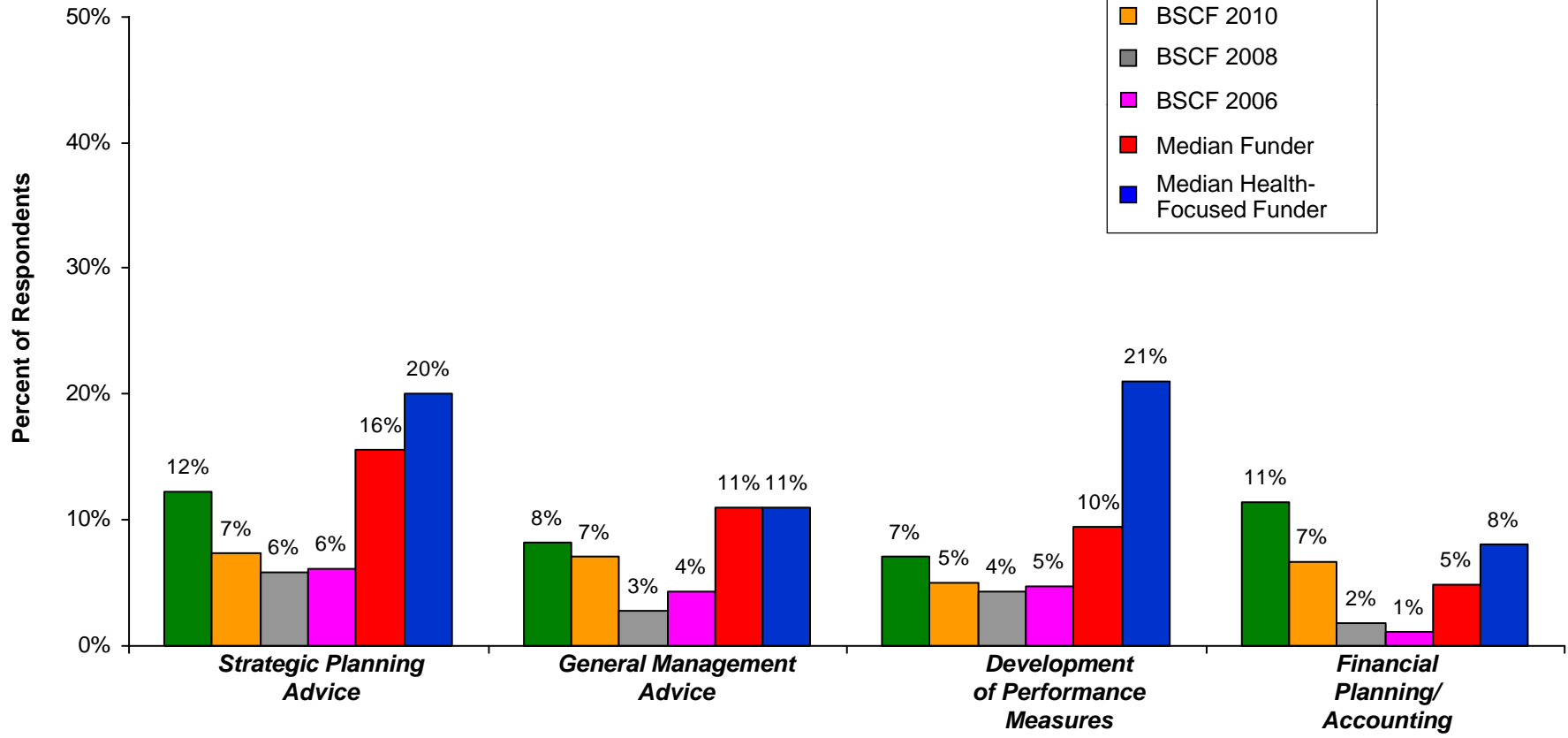
Note: This question was only asked of those grantees that indicated they received non-monetary assistance from staff or a third party paid for by the Foundation. BSCF 2010, BSCF 2008, BSCF 2006, and health-focused funder data not available due to changes to the survey instrument.

1: Represents data from 74 funders.

Management Assistance Activities

Frequency of Management Assistance Activities

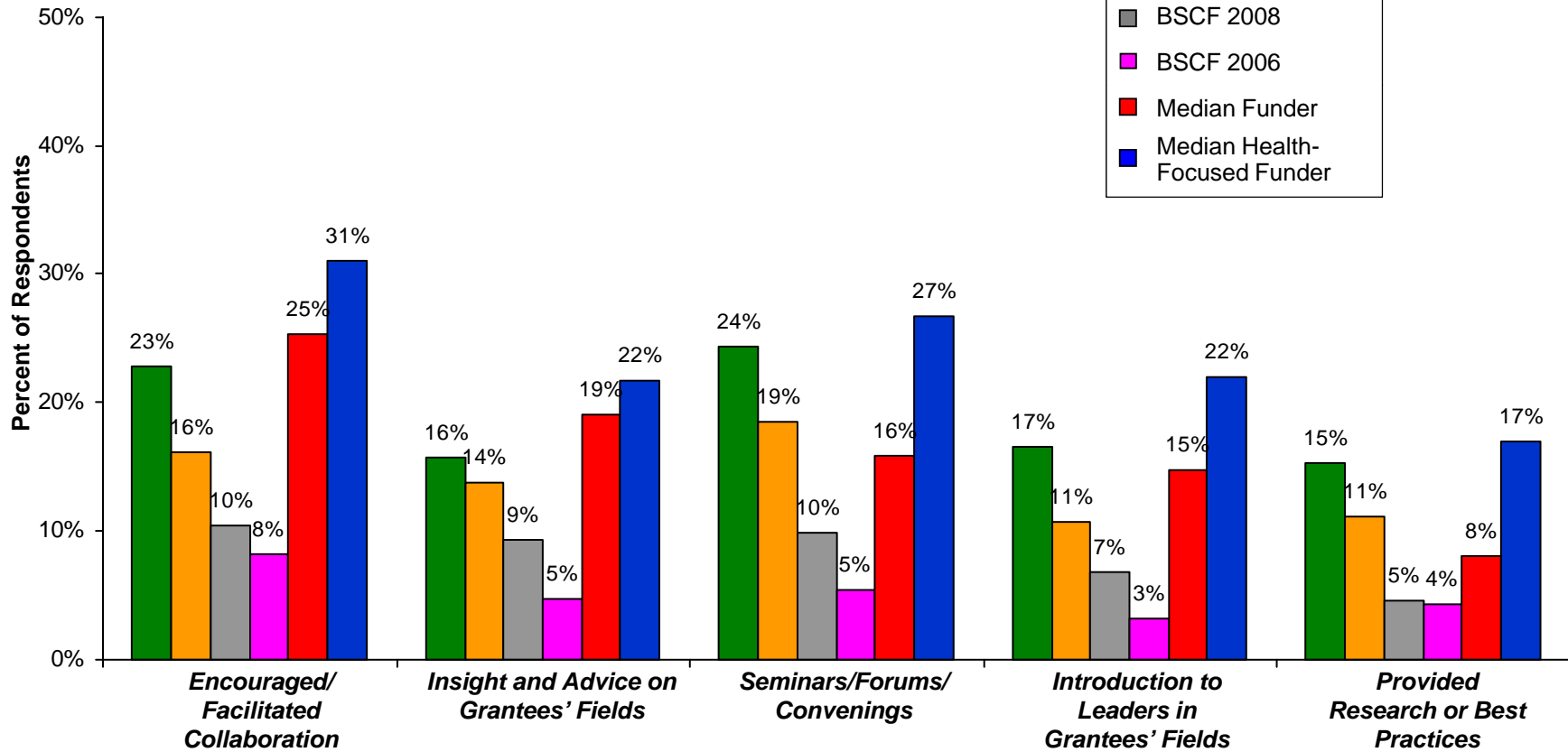
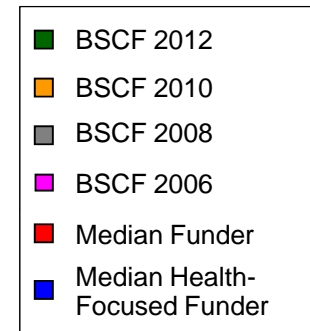
Scale ends at 50%



Field-Related Assistance Activities

Frequency of Field-Related Assistance Activities

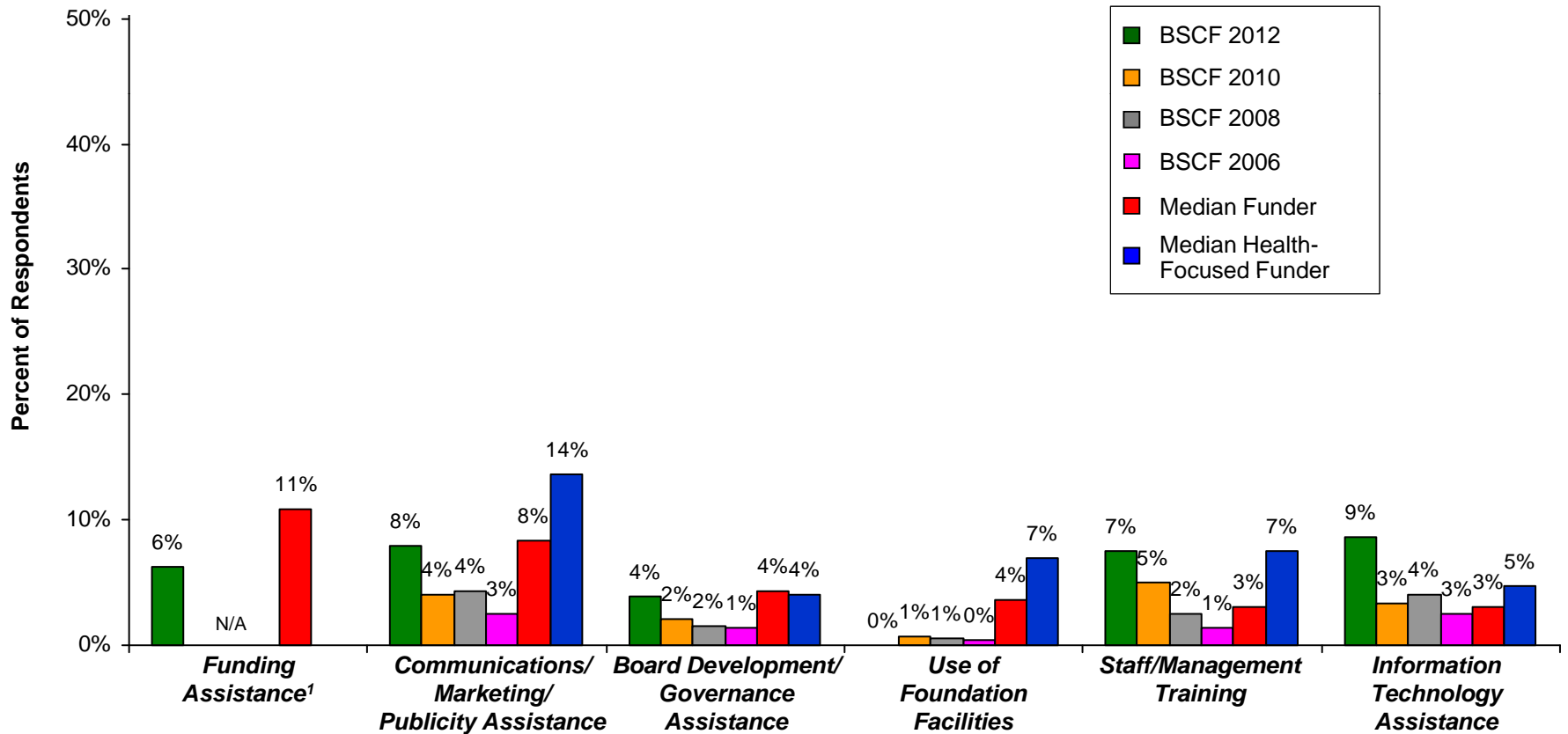
Scale ends at 50%



Other Support Activities

Frequency of Other Assistance Activities

Scale ends at 50%



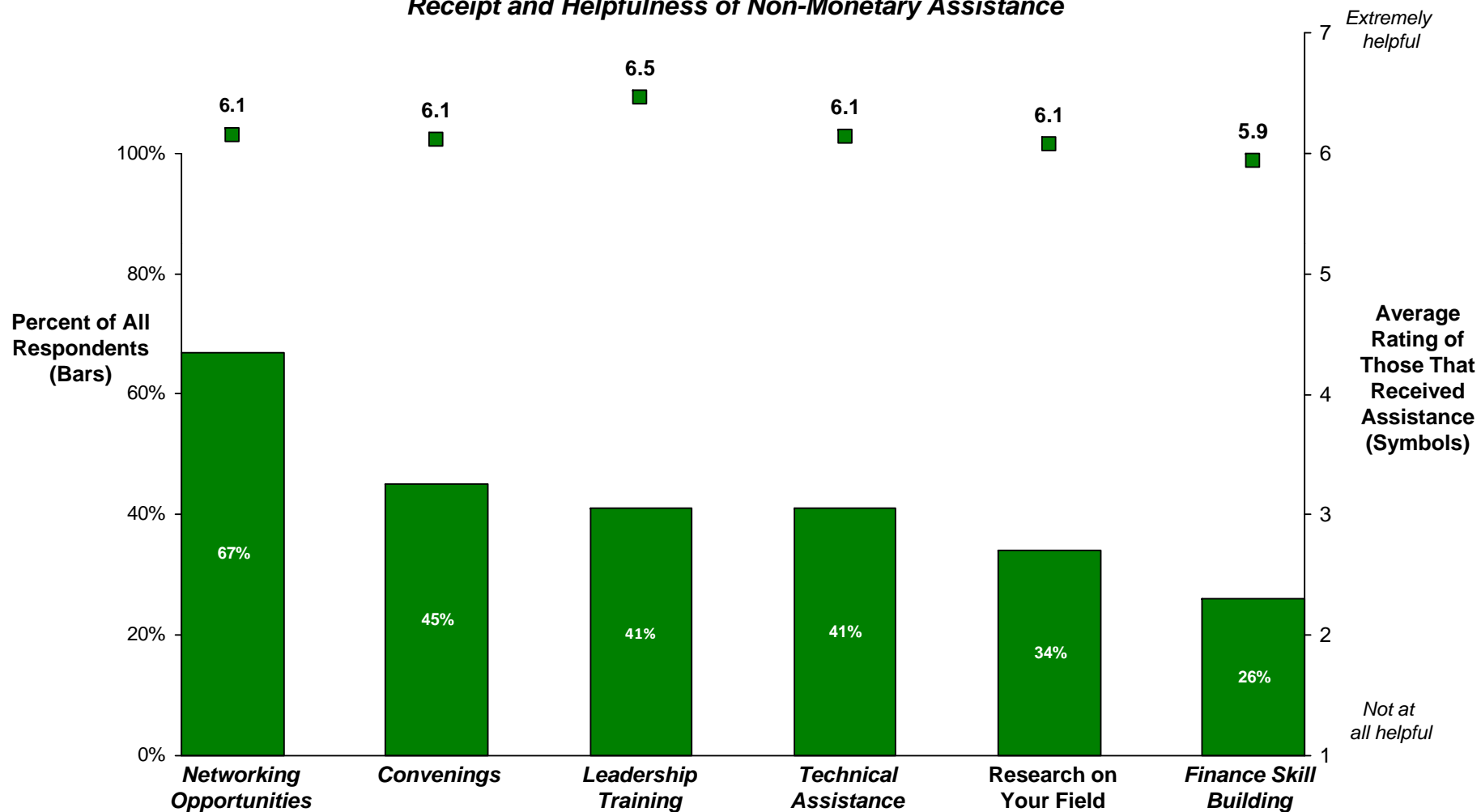
Note: BSCF 2010, BSCF 2008, BSCF 2006, and median health-based funder data on "Funding Assistance" not available due to changes to the survey instrument.

1: Represents data from 34 funders.

Other Non-Monetary Assistance

BSCF grantees were asked to indicate whether they had received certain forms of non-monetary assistance from BSCF. They were also asked to rate the helpfulness of these forms of assistance, with 1 = “Not at all helpful,” and 7 = “Extremely helpful.” Grantees indicate that they find BSCF’s leadership training to be the most helpful form of non-monetary assistance.

Receipt and Helpfulness of Non-Monetary Assistance



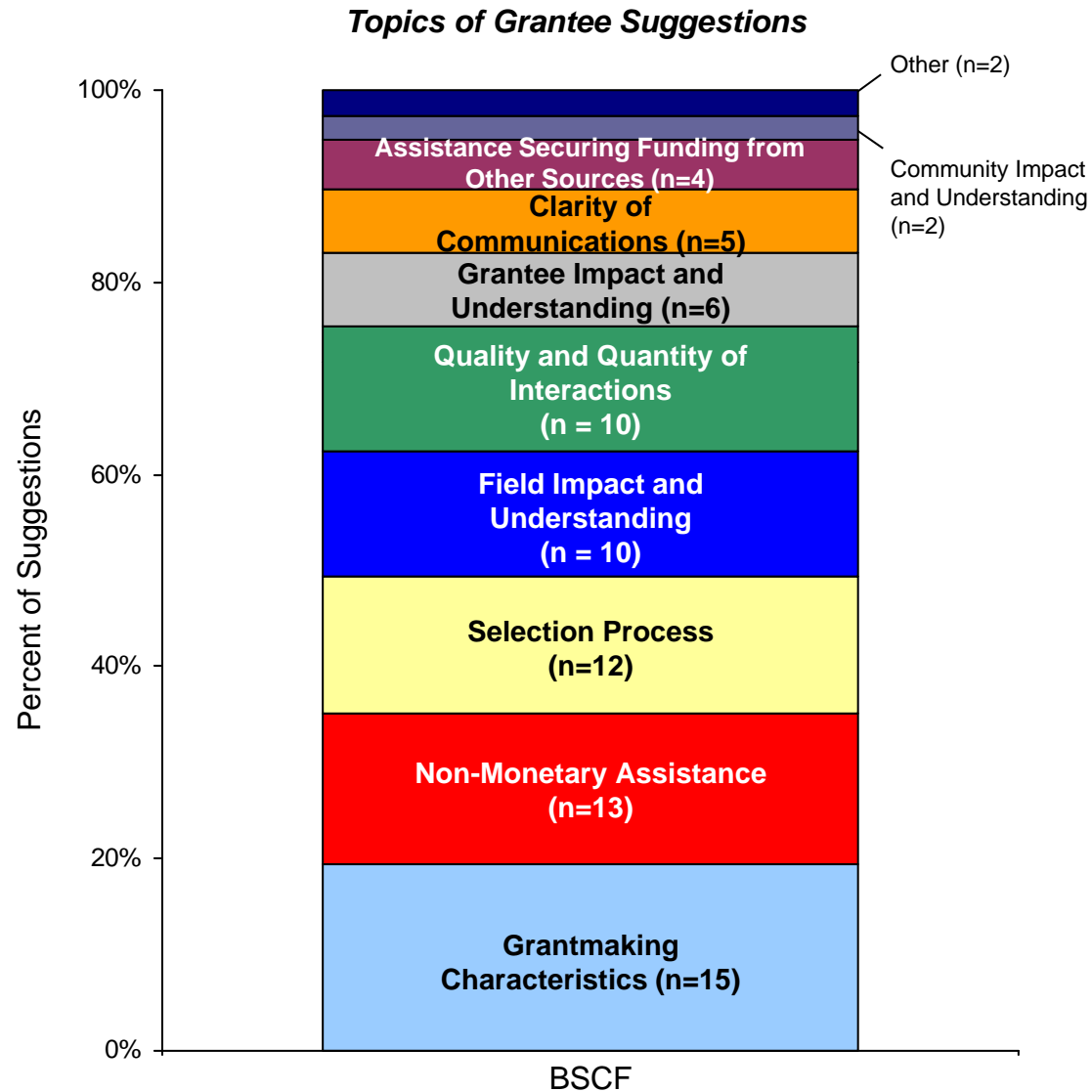
Note: No comparative data is available because the question was only asked of BSCF grantees.

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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 characteristics of the Foundation's grants.



Grantee Suggestions for the Foundation (2)

% Grantee Suggestions		BSCF Grantee Suggestions
Topic of Grantee Suggestion	BSCF	Sub-Themes and Sample of Comments
Grantmaking Characteristics	19%	<p><u>Grant Size (n=11):</u> “Larger grants.” “As always, an increase in the amount of the grant would have a significant impact!” “More money would always be welcome!” “A higher level of funding.” “More money!”</p>
		<p><u>Grant Length (n=2):</u> “Funding for two years at a time would be helpful.” “It is my understanding that the BSCF board would like to limit multi-year grants. It is helpful to have a long term relationship, and I wish it were possible for us to continue our partnership in the future.”</p>
		<p><u>Other (n=2):</u> “It seems like priorities shift quickly and at times it is hard to track - a deeper focus on fewer programs might be more effective!” “[BSCF] severely limits the coverage of organizational overhead. In effect this means that when we accept BSCF funding we are subsidizing it with funds from other programs, a dynamic that could lead to reduced interest in working with the foundation.”</p>
Non-monetary Assistance	16%	<p>“Bring grantees together at the beginning and end of grant periods to network, share successes, and lessons learned.” “Engage other funders – mentor them so they can create as large an impact as BSCF.” “Perhaps they could convene grantees for educational purposes to share best practices and information on outcomes evaluation, etc.” “Standing community advisory groups around the state representative of racial, ethnic, geographic, gender, sexual orientation, limited mobility, age, occupational, and income populations.” “Annual program staff meetings throughout the state (maybe 5 or 6 locations) might be helpful to continue the conversation and knowledge of each other’s needs.” “Conduct conferences in southern California for domestic violence agencies to get together and to learn about best practices.” “If it is available, advertise some of their other pro-bono support activities or resources available, like the things listed in the non-monetary support question in this survey.”</p>

Grantee Suggestions for the Foundation (3)

% Grantee Suggestions		BSCF Grantee Suggestions
Topic of Grantee Suggestion	BSCF	Sub-Themes and Sample of Comments
Selection Process	15%	<p>“It would be helpful if we had a little more time between the deadline for the final report and the deadline for the new grant proposal submission.”</p> <p>“The proposal for funds is very time consuming.”</p> <p>“I think I'd like to know more about how BSCF determines annual funding allocations. I would also like to see a more specific question in the grant application process that defines the number of people in extremely underserved areas who are being served by a clinic.”</p> <p>“Provide more time for the grant application process.”</p> <p>“The data needed in the grant proposal was very cumbersome and some questions need the opportunity for an explanation and there wasn't an opportunity to provide the information.”</p> <p>“Our primary critique of BSCF is the online application form. The form is hard to use, repetitive, and takes many hours to complete.”</p>
Field Impact and Understanding	13%	<p>“Work closer with the field in determination of priority for funding and the status of the health center world.”</p> <p>“Providing more funding for culturally and linguistically specific service providers.”</p> <p>“Increase knowledge and awareness about DV challenges in rural communities.”</p> <p>“Possible development of an emergency funding pool added to already existing funding to provide funds for one-time help if needed.”</p> <p>“Don't lose site of the original goal of creating a stronger field. Continue to provide a forum for education and mentorship for DV Leaders and be inclusive of all DV in the process.”</p>
Quality and Quantity of Interactions	13%	<p>“Site visits and face to face conversations.”</p> <p>“We'd love to have site visits from the staff. We believe that our work would inspire them to consider giving us multi-year grants.”</p> <p>“Perhaps more, or at least, more personal contact. We really appreciate the funding we receive from BSCF, but we have no idea what BSCF thinks about us, or wants from us.”</p> <p>“While foundation staff have taken great steps toward getting to know many folks in the field, it feels a bit cliquish with the usual suspects getting the extra funding and taking leadership roles at convenings.”</p>

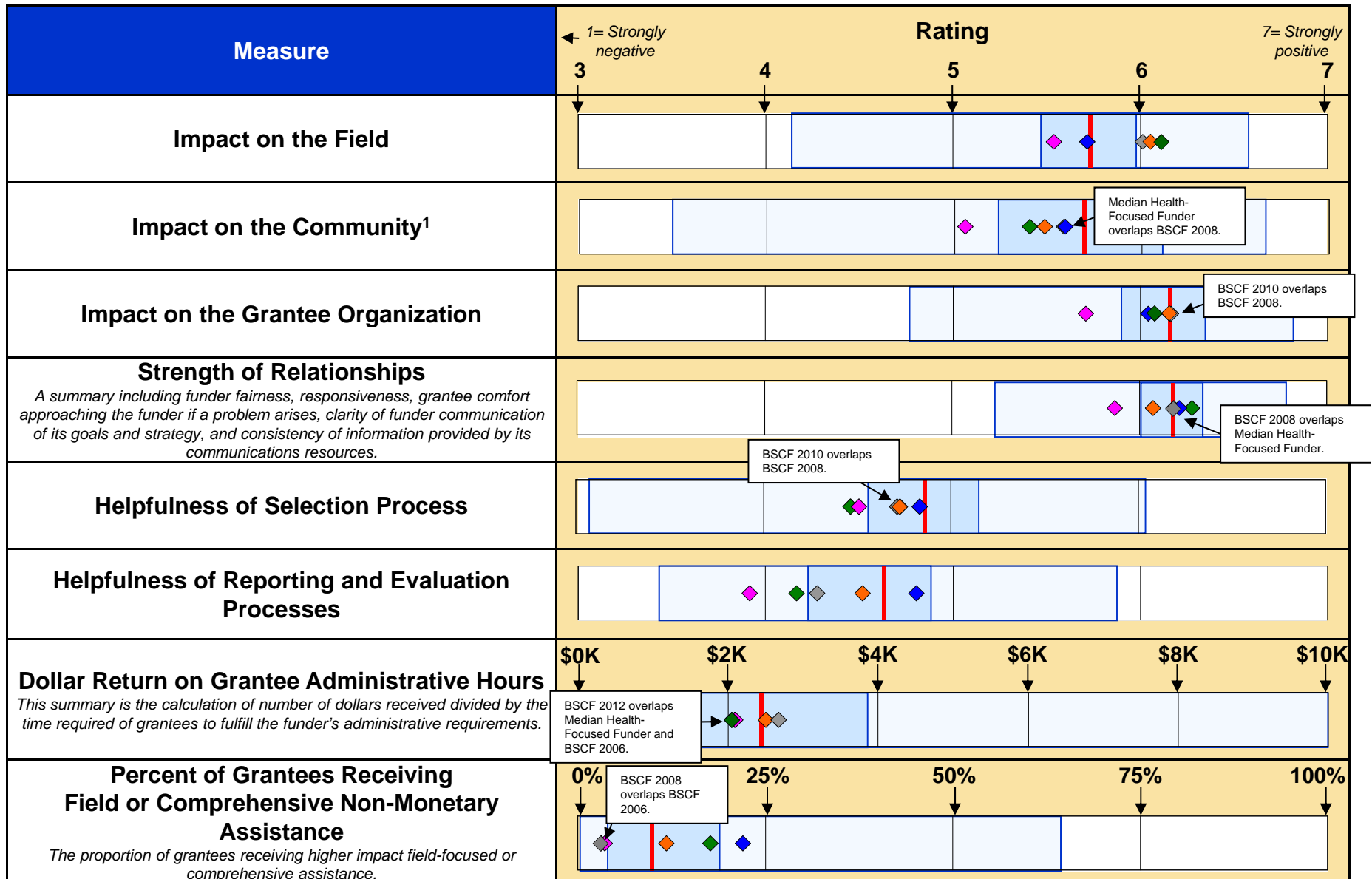
Grantee Suggestions for the Foundation (4)

% Grantee Suggestions		BSCF Grantee Suggestions
Topic of Grantee Suggestion	BSCF	Sub-Themes and Sample of Comments
Grantee Impact and Understanding	8%	<p>“Understanding our cultural perspective and genuinely embedding [this knowledge] in their funded DV projects.”</p> <p>“Well, not just BSCF, but all institutional funders, I think, should ask themselves if or how they might be incentivizing staff burnout at supported nonprofits.”</p>
Clarity of Communications	6%	<p>“More information about larger grant opportunities.”</p> <p>“Explain why we are granted the dollar figure we are granted. What were the ranges of grant awards and how was the decision made.”</p> <p>“Continue to seek transparency and to describe to the groups you fund your plans and intentions.”</p>
Assistance Securing Funding from Other Sources	5%	<p>“Assist with additional funding if possible.”</p> <p>“We would like BSCF to assist us in finding other potential funders.”</p> <p>“Introductions to other funders who focus on domestic violence.”</p> <p>“BSCF could also use its considerable influence and power of persuasion to convince other private foundations, corporations and related funders to re-double their efforts to support community based, primary care clinics.”</p>
Community Impact and Understanding	3%	<p>“I think it has to incorporate its cultural competency efforts as part of the strong field initiative, not as a special set aside.”</p> <p>“[The Foundation] needs to consider a particular community more as opposed to a particular program strategy such as place based justice centers.”</p>
Other	3%	<p>“Check RFA/RFI links prior to sending them out.”</p> <p>“Don't be an arm of CPEDV.”</p>

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Review of Findings



IX. Review of Findings and Intra-Foundation Differences

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

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 minimum, median, and maximum level of change we see across the first to second GPRs of repeat funders.

Measure	2006 to 2008	2008 to 2010	2010 to 2012	Overall Change	Maximum Decrease	Median Level of Change	Maximum Increase
Impact on the Field	0.5	0.0	0.1	0.6	-0.4	0.2	1.1
Impact on the Community	0.5	-0.1	-0.1	0.3	-0.8	0.1	1.1
Impact on the Grantee Organization	0.5	0.0	-0.1	0.4	-0.5	0.2	1.0
Strength of Relationships	0.3	-0.1	0.2	0.4	-0.5	0.1	0.3
Helpfulness of Selection Process	0.2	0.0	-0.3	0.0	-0.6	0.1	1.3
Helpfulness of Reporting and Evaluation Processes	0.4	0.2	-0.4	0.3	-0.8	0.1	0.9
Dollar Return on Grantee Administrative Hours	\$575	-\$167	-\$417	-\$8	-\$2,321	\$143	\$9,330
Percent Receiving Field or Comprehensive Non-Monetary Assistance	-1%	9%	6%	14%	-30%	2%	29%

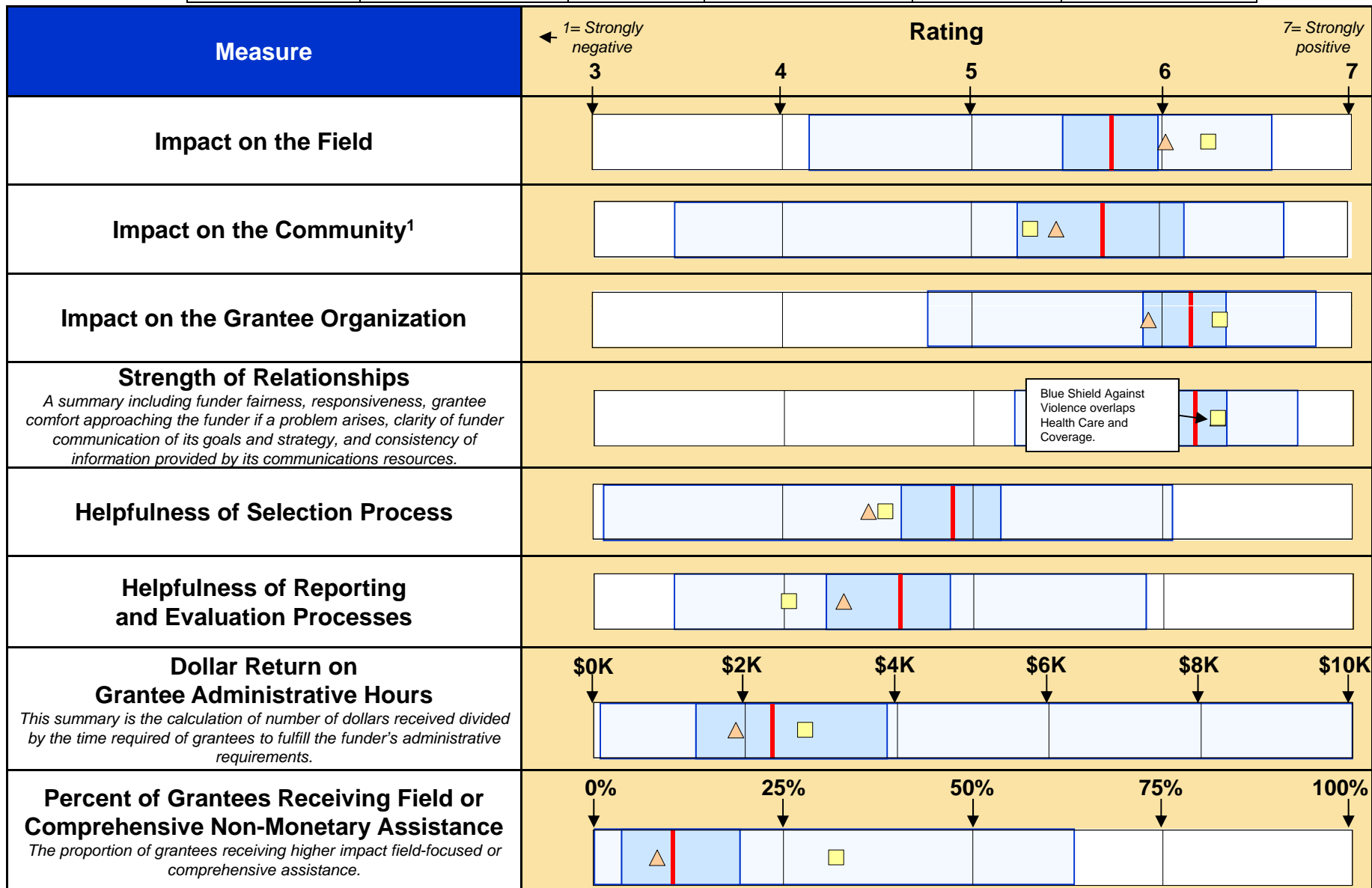
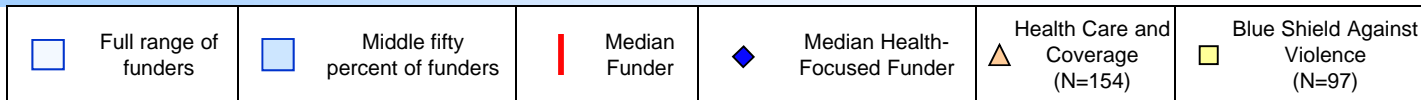
Intra-Foundation Differences (1)

BSCF's survey results were examined for differences in ratings among grantees based on the following criteria:

- ◆ Areas of Funding
- ◆ Types of Support

The following pages highlight differences across key dimensions in the Grantee Perception Report based on the above groups.

Intra-Foundation Differences (2)



Blue Shield Against Violence overlaps Health Care and Coverage.

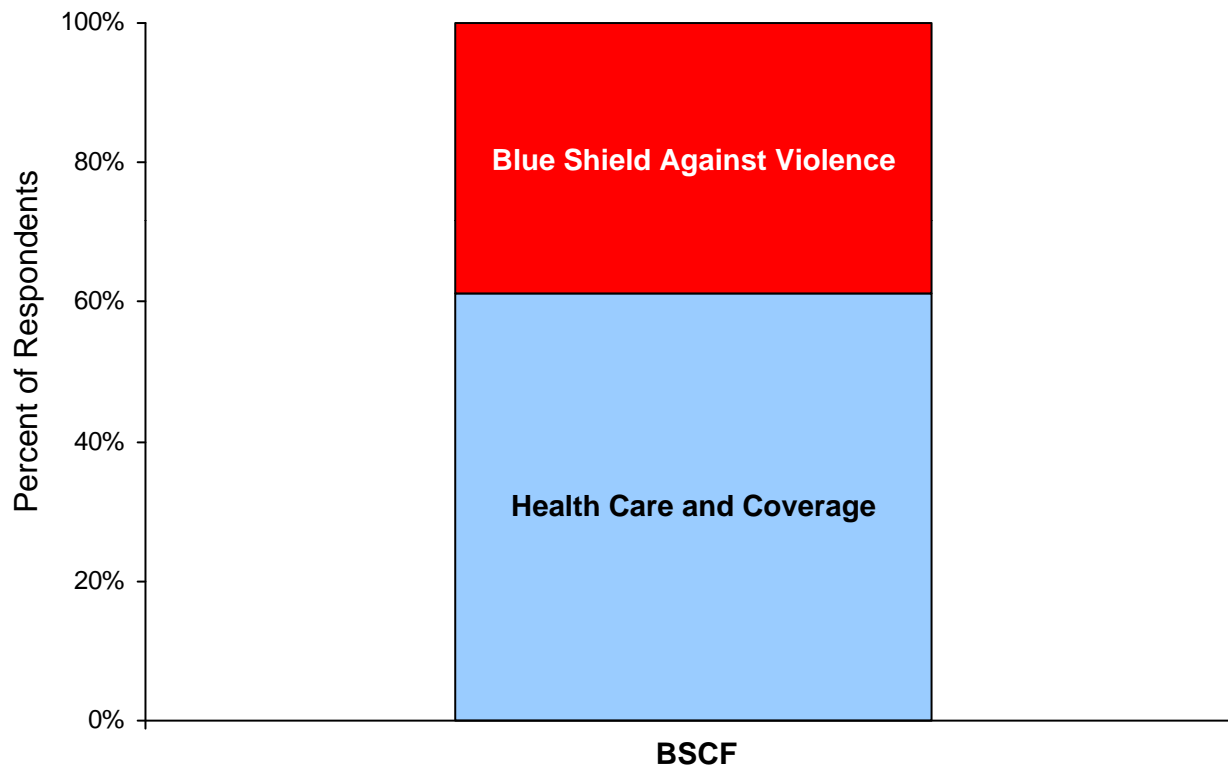
IX. Review of Findings and Intra-Foundation Differences

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

Intra-Foundation Differences (3)

BSCF grantees were asked to indicate the from which of the Foundation’s areas of funding they received their grant.

“From which of BSCF’s areas of funding did you receive this grant?”



BSCF Analysis – Variation by Area of Funding

BSCF grantees rate differently based on the area from which they receive their grant.

Grantees that received grants from the Health Care and Coverage area rate significantly higher than do other grantees on:

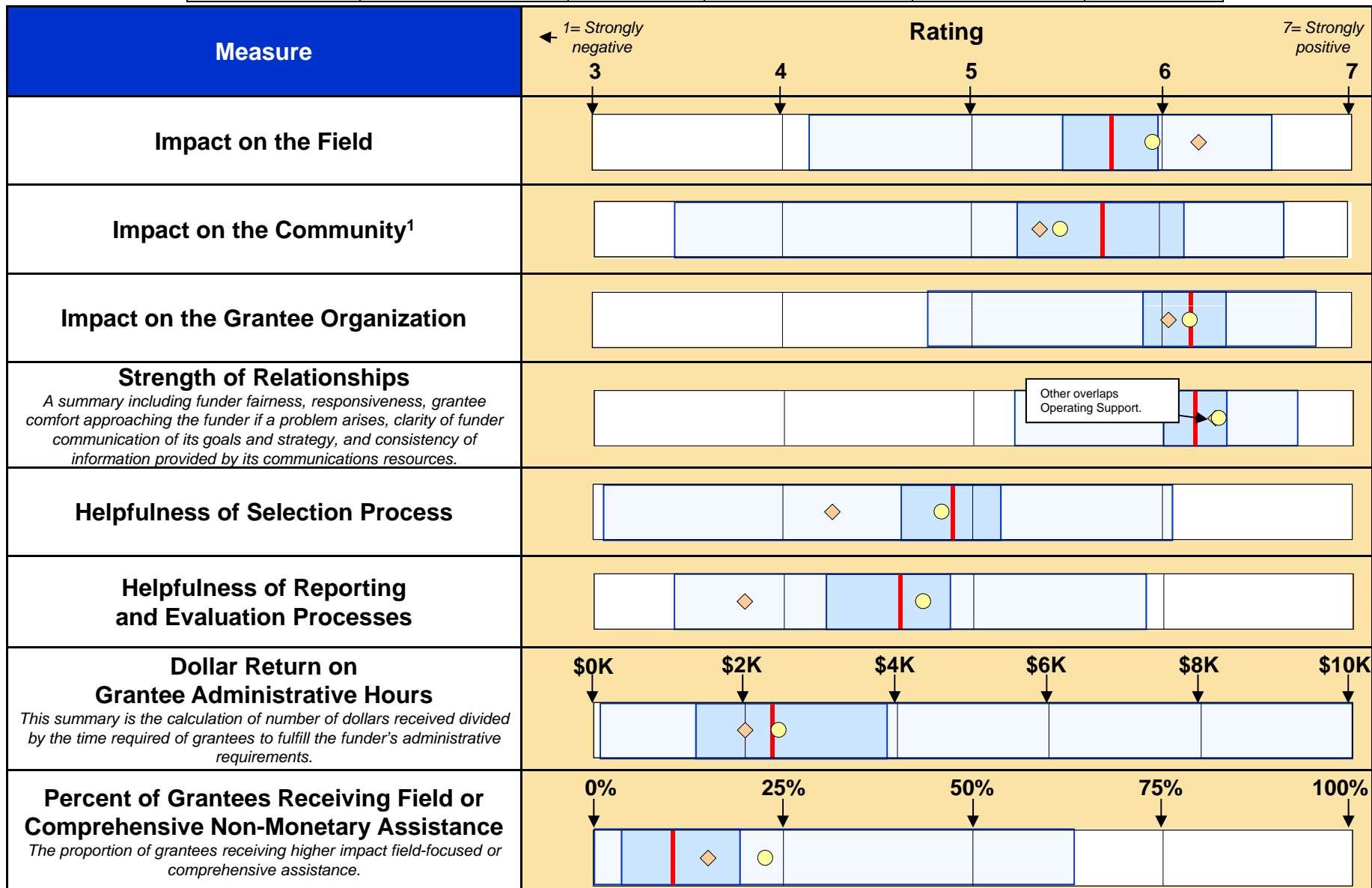
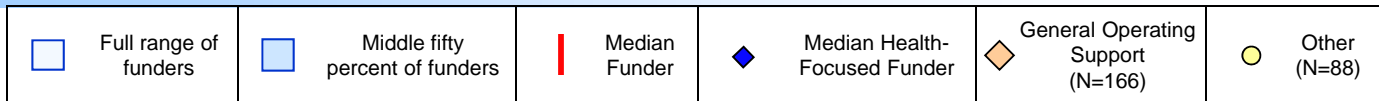
- ♦ Understanding of grantees’ fields
- ♦ Understanding of grantees’ local communities

However, they also rate lower than do other grantees on:

- ♦ Impact on grantees’ organizations

Note: No comparative data is available because this question was only asked of BSCF grantees. Three grantees indicated that they “Don’t Know” from which area they received their grant.

Intra-Foundation Differences (4)

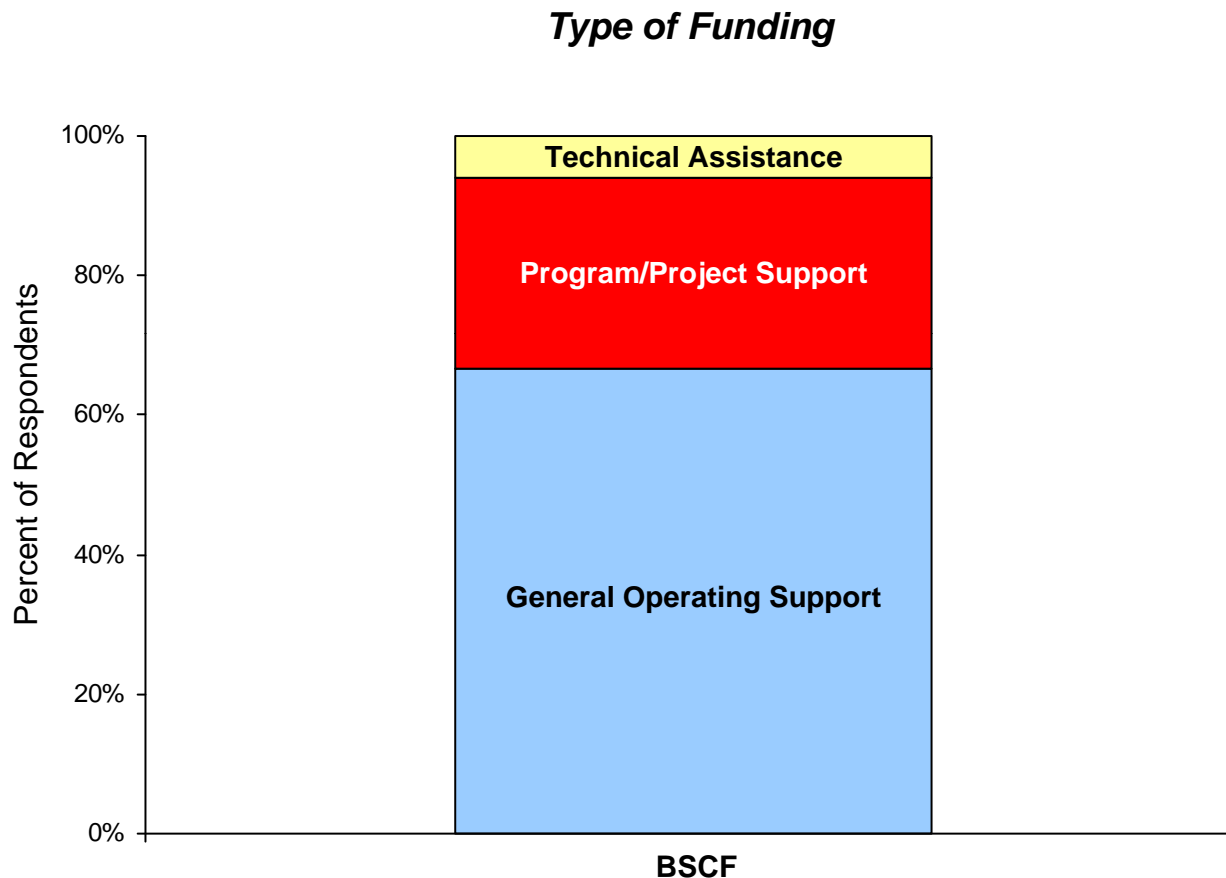


IX. Review of Findings and Intra-Foundation Differences

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

Intra-Foundation Differences (5)

BSCF grantees were asked to indicate what type of funding they received from the Foundation.



BSCF Analysis – Variation by Type of Funding

BSCF grantees rate differently based on the type of funding they receive from the Foundation.

Grantees that received General Operating Support rate significantly higher than do other grantees on:

- ♦ Impact on grantees' fields
- ♦ Understanding of grantees' fields

However, they also rate lower than do other grantees on:

- ♦ Helpfulness of the selection process
- ♦ Helpfulness of the reporting and evaluation process

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Analysis and Discussion (1)

Continued strong impact on grantees' fields

In 2010, grantees rated Blue Shield of California Foundation (BSCF) more positively than the typical foundation in CEP's comparative dataset on measures related to the Foundation's work in their fields. In 2012, grantees continue to rate the Foundation as positively as, and in some cases even more positively than, they did in 2010 for its work in their fields.

BSCF is rated above 88 percent of funders for its impact on grantees' fields. As one grantee notes, "The Foundation has been a leader within the healthcare foundation field.... [It] understands where the field is going and designs funding strategies to help position organizations to be successful." Not only do grantees rate the Foundation positively for its impact, they also indicate that the Foundation has a "full understanding" of their fields. Grantees in 2012 rate BSCF significantly higher than BSCF grantees in 2010 and higher than the vast majority of funders in CEP's comparative dataset for its understanding of their fields. Grantees that receive general operating support grants from the Foundation rate higher than do other grantees for the Foundation's impact on and understanding of their fields.

Grantees acknowledge that BSCF is often a catalyst for the dissemination of knowledge and the advancement of policy through the "policy papers & reports, trainings, and convenings" it offers. Grantees rate the Foundation higher than 90 percent of funders for its advancement of knowledge in their fields as well as its effect on public policy in their fields. Many grantees observe that BSCF is "a leading advocate on policy issues," and one grantee comments, "It is obvious that BSCF has been a leader not only on specific issues such as domestic violence, but also on larger policy issues such as health care reform."

- *What changes has the Foundation implemented since 2010 that it believes may have driven more positive perceptions of its understanding and advancement of knowledge in the fields in which its grantees work?*

Analysis and Discussion (2)

Impact on grantees' organizations

Similar to the Foundation's ratings in 2010, BSCF is rated typically for its impact on grantees' organizations in 2012. In addition, grantees rate the Foundation similarly to the median funder in CEP's comparative dataset for its understanding of their goals and strategies, and the impact of its funding on their ability to continue the work funded by the grant.

Grantees' ratings for BSCF's impact on their organizations are related to the characteristics of BSCF's grants. Grantees credit the Foundation for its "understanding of the need for general operating dollars" to sustain their work, and BSCF does give a much larger than typical proportion of its grantees operating support. Grantees that receive operating support from BSCF also rate the Foundation significantly higher for its impact on and understanding of their fields.

As in past surveys, grants made by BSCF tend to be smaller than grants at the typical foundation (\$30K vs. \$60K at the median foundation). For BSCF grantees, the size of grant does matter: BSCF grantees that receive grants larger than \$20K rate the Foundation significantly higher for its impact on their organizations and the effect of the Foundation's funding on their ability to sustain the work funded by the grant in the future.

As was the case in 2010, when asked to provide suggestions for how BSCF can improve, the largest proportion of grantees cite characteristics of the Foundation's grants. In particular, many grantees request larger grants from the Foundation. Though grantees acknowledge that BSCF potentially has a "tight budget," many also comment that, "an increase in the amount of the grant would have a significant impact" on their organizations.

Recognizing that the Foundation may lack flexibility to provide larger grants, it may want to consider other ways to increase impact on grantees' organizations. One way might be to provide more assistance to grantees in their efforts to secure funding from *other* sources. Currently, the proportion of grantees that indicate that they have received help from the Foundation in securing funding from other sources is smaller than at the typical funder.

- *Is creating impact on grantee organizations an important goal of the Foundation?*
- *If so, in what ways could the Foundation help grantees that are seeking more funding? Is the Foundation in a position to provide a larger proportion of its grantees with assistance finding additional sources of funding?*

Analysis and Discussion (3)

Improvements in the Funder-Grantee relationship

In 2010, grantees rated BSCF lower than the typical funder on a summary measure of funder-grantee relationships that takes into account the quality of interactions and communications between the Foundation and its grantees. In 2012, ratings are improved: grantees rate the Foundation similarly to or more positively than they did in 2010 on all of the items comprising the relationship measure. These improvements occurred even though grantees continue to indicate, as they did in 2010, that they interact with the Foundation less frequently than typical.

When asked to provide the word that best describes the Foundation, BSCF grantees most frequently use the words “supportive” and “responsive,” and these perceptions are reflected in their ratings of the Foundation. In particular, grantees rate the Foundation higher than 75 percent of other funders for their comfort approaching the Foundation if a problem arises, and rate the Foundation significantly higher than in 2010 for the responsiveness of its staff. One grantee observes, “Out of all of the foundations and partners we work with, BSCF is the most caring and understanding.... Whenever I need help, they are there.”

Grantees also indicate improvement in the quality of the Foundation’s communications. BSCF grantees rate the Foundation significantly higher than grantees in 2010 for both the clarity of its communication of its goals and strategy and the consistency of information provided by its communication resources. As one grantee notes, “[The Foundation provides] very effective communications to...grantees and is always clear and concise whenever something is required.”

As mentioned above, fifty-four percent of BSCF grantees report interacting with their program officer on a yearly or less frequent basis. Though this proportion is smaller than the proportion in 2010, it is almost triple the proportion at the typical funder. The frequency with which BSCF grantees interact with their program officers matters: BSCF grantees that interact with their program officer once every few months or more frequently rate the Foundation significantly higher on a variety of measures, including the fairness of treatment they received from the Foundation, and the helpfulness of the Foundation’s selection and evaluation processes in strengthening their organizations.

- *Would the Foundation like to improve relationships further? If so, should it consider increasing the frequency of contact with grantees? Is the Foundation comfortable with its current level of interaction with its grantees?*
- *Can the Foundation identify changes that it made that may have led to more positive perceptions of the Foundation’s responsiveness?*

Analysis and Discussion (4)

More straightforward but less helpful than typical processes

Though BSCF has improved on many of the measures in the Grantee Perception Report, grantees rate less positively than they did in 2010 for the helpfulness of the Foundation's selection and reporting/evaluation processes in strengthening their organizations or funded programs. Of note, grantees that indicate that they have received consistent support from the Foundation trend towards rating lower than other grantees for the helpfulness of these processes. This data raises a question for the Foundation as to how helpful these processes should, or can, be for grantees that maintain a consistent funding relationship with BSCF over time. Still, BSCF grantees spend much less time than grantees at the typical funder completing BSCF's grantmaking requirements and frequently express gratitude for the Foundation's "very streamlined and very grantee-friendly" processes.

On average, grantees spend less time completing BSCF's selection process than grantees at the typical funder. More than 40 percent of BSCF grantees spend fewer than 10 hours completing BSCF's selection process, compared to 24 percent at the typical funder. Grantees also report spending slightly less time on BSCF's reporting and evaluation process. Sixty-three percent of grantees report spending less than 10 hours per year on BSCF's reporting and evaluation process, compared to 57 percent at the typical funder.

Though grantees express appreciation for the Foundation's "simple" grant processes, grantees that have more in-depth conversations with the Foundation regarding these processes indicate that they find them to be more helpful. Grantees that discussed with Foundation staff how the results of their grant would be assessed rate significantly higher on many measures in the Grantee Perception Report, including the helpfulness of the reporting process. Similarly, feedback around the reporting process matters to grantees. Though a much smaller than typical proportion of BSCF grantees report discussing their completed evaluation or report with the Foundation, those that did rate the Foundation significantly higher on many measures in the Grantee Perception Report, including the helpfulness of the reporting process in strengthening their organization.

- *How does the Foundation currently consider the balance between having an expedient, "streamlined" grant process, versus having a process that is longer/more involved, but potentially more helpful? Does it feel like the current balance is correct, given the Foundation's goals and strategies?*
- *Can the Foundation identify any opportunities to take steps to increase the utility of these processes – steps like discussing submitted reports more frequently with grantees?*

Analysis and Discussion (5)

Grantees continue to receive intensive forms of non-monetary assistance

CEP's research suggests that grantees that receive more intensive, deliberate patterns of non-monetary assistance activities have a substantially more positive experience with their funders than grantees receiving no or little assistance. In 2010, 12 percent of BSCF's grantees received these more involved patterns of non-monetary assistance from the Foundation. Currently, 18 percent of the Foundation's grantees report receiving these field-focused or comprehensive patterns of assistance, a proportion larger than the typical funder and median health-focused funder in BSCF's cohort.

While a larger proportion of BSCF grantees are receiving intensive non-monetary assistance than in the past, they also find the Foundation's assistance to be more helpful than typical. The Foundation is rated above the majority of funders in CEP's comparative dataset for the helpfulness of its non-monetary assistance in strengthening grantee organizations' work. In addition, grantees that are receiving field-focused or comprehensive non-monetary assistance rate the Foundation significantly higher on many measures in the Grantee Perception Report, including the Foundation's impact on grantees' fields and organizations. As one grantee mentions, "BSCF has created an opportunity for leaders within the field to convene and forge strong partnerships to move the field forward."

- *How does the Foundation currently allocate resources towards providing non-monetary assistance to grantees? Are there opportunities to provide more extensive non-monetary assistance to grantees currently receiving little to none?*

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Additional GPR Results

Survey Item	BSCF 2012	Full Dataset Median	Health-Focused Funder Median
Understanding of Social, Cultural, and Socioeconomic Factors			
How well does the Foundation understand the social, cultural, and socioeconomic factors that affect your work? (1="Limited understanding", 7="Thorough understanding") ¹	5.8	5.7	N/A
Assessing Results of the Funded Work			
Proportion of grantees that exchanged ideas with BSCF regarding how it would assess results ²	30%	71%	74%
How useful to your organization was that exchange? (1="Not at all useful", 7="Extremely useful") ¹	5.9	5.7	N/A

1: This table includes data from 40 funders. BSCF 2010, BSCF 2008, BSCF 2006, and Health-Focused Funder data not available due to changes to the survey instrument.

2: This table includes data from 74 funders. BSCF 2010, BSCF 2008, and BSCF 2006 data not available due to changes to the survey instrument.

Online Media

Measure	BSCF 2012			Full Dataset Median		
Use of Online Resources Created by the Foundation or its Staff						
Facebook	12%			8%		
Video Sharing (e.g., YouTube)	4%			4%		
Blog(s)	6%			5%		
Twitter	7%			4%		
None of the above	51%			46%		
Don't know whether the Foundation uses these online media resources	31%			38%		
Potential Use of Online Resources (only asked of grantees who did not select one or more options to the question above)						
Facebook	36%			41%		
Video Sharing (e.g., YouTube)	57%			55%		
Blog(s)	38%			51%		
Twitter	24%			23%		
Other	N/A			N/A		
Current Use of Online Resources (only asked of grantees who indicated they used at least one of the Foundation's online media resources)						
<i>I currently use these online resources for:</i>	<i>General information about the Foundation</i>	<i>Content-specific information relevant to my work</i>	<i>To interact with the Foundation</i>	<i>General information about the Foundation</i>	<i>Content-specific information relevant to my work</i>	<i>To interact with the Foundation</i>
Facebook	66%	24%	31%	44%	33%	15%
Video Sharing (e.g., YouTube)	0%	78%	11%	31%	53%	7%
Blog(s)	57%	43%	14%	40%	58%	7%
Twitter	50%	28%	17%	36%	38%	14%
Helpfulness of Online Resources (1 = Not at all helpful, 7 = Extremely helpful; only asked of grantees who indicated they used at least one of the Foundation's online media resources)						
To learn about the Foundation generally	5.0			4.8		
To learn about information relevant to the fields or communities in which grantees work	4.9			4.9		
To learn about the Foundation's goals and strategies	4.8			4.8		
To interact and share ideas with the Foundation	4.4			4.2		
Use of Online Resources to Communicate About Grantees' Work						
Facebook	76%			81%		
Video Sharing (e.g., YouTube)	34%			55%		
Blog(s)	19%			35%		
Twitter	41%			45%		
Other	14%			16%		
None of the above	16%			12%		

Note: This table represents data from 56 funders, except "Use of Online Resources to Communicate About Grantees' Work" which represents data from 58 funders. BSCF 2010, BSCF 2008, BSCF 2006, and Health-Focused Funder data not available due to changes to the survey instrument.

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Grantmaking Characteristics

Measure	BSCF 2012	BSCF 2010	BSCF 2008	BSCF 2006	Full Dataset Median	Health-Focused Funder Median
Length of Grant Awarded						
<i>Average grant length</i>	1.9 years	2.0 years	2.0 years	1.6 years	2.1 years	2.0 years
1 year	52%	46%	45%	70%	51%	42%
2 years	37%	37%	37%	21%	21%	25%
3 years	2%	5%	7%	6%	17%	22%
4 years	3%	3%	6%	1%	3%	4%
5 or more years	7%	9%	6%	1%	8%	7%
Type of Grant Awarded						
Program/Project Support	27%	32%	40%	52%	65%	71%
General Operating Support	66%	61%	55%	44%	20%	15%
Capital Support: Building/Renovation/ Endowment Support/Other	0%	1%	2%	2%	8%	2%
Technical Assistance	6%	5%	2%	1%	5%	10%
Scholarship/Fellowship	0%	0%	0%	0%	2%	1%
Event/Sponsorship Funding ¹	0%	N/A	N/A	N/A	N/A	N/A
Grant Amount Awarded						
<i>Median grant size</i>	\$30K	\$40K	\$40K	\$30K	\$60K	\$63K
Less than \$10K	1%	0%	1%	9%	11%	7%
\$10K - \$24K	25%	13%	18%	32%	15%	11%
\$25K - \$49K	41%	45%	42%	23%	15%	14%
\$50K - \$99K	9%	17%	19%	22%	17%	19%
\$100K - \$149K	8%	6%	5%	4%	10%	11%
\$150K - \$299K	9%	8%	6%	5%	13%	20%
\$300K - \$499K	4%	3%	3%	2%	7%	9%
\$500K - \$999K	2%	3%	3%	1%	6%	5%
\$1MM and above	2%	3%	2%	2%	7%	4%
Median Percent of Budget Funded By Grant (Annualized)						
Size of grant relative to size of grantee budget	1%	1%	1%	1%	3%	3%

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*.

Grantee Characteristics (1)

Measure	BSCF 2012	BSCF 2010	BSCF 2008	BSCF 2006	Full Dataset Median	Health-Focused Funder Median
Operating Budget of Grantee Organization						
<i>Median budget</i>	\$3.6MM	\$4.0MM	\$3.0MM	\$2.8MM	\$1.4MM	\$1.3MM
< \$100K	2%	2%	2%	2%	8%	7%
\$100K - \$499K	6%	8%	8%	10%	20%	21%
\$500K - \$999K	12%	11%	13%	11%	14%	13%
\$1MM - \$4.9MM	35%	33%	38%	34%	29%	29%
\$5MM - \$24.9MM	28%	33%	29%	28%	18%	19%
\$25MM and above	17%	14%	11%	15%	10%	11%
Length of Establishment of Grantee Organizations						
<i>Median length of establishment</i>	33 years	31 years	30 years	28 years	24 years	27 years
Less than 5 years	1%	3%	4%	2%	7%	9%
5 - 9 years	6%	6%	4%	7%	13%	11%
10 -19 years	15%	18%	18%	19%	23%	20%
20 - 49 years	67%	63%	66%	63%	36%	38%
50 - 99 years	5%	6%	6%	7%	12%	12%
100 years or more	6%	3%	2%	3%	8%	10%

BSCF Analysis – Variation by Size of Operating Budget

BSCF grantees rate differently based on the size of their operating budget.

Grantees that have operating budgets above \$3.6 MM rate significantly higher than do other grantees on:

- ◆ Impact on and grantees' fields
- ◆ Impact on grantees' local communities
- ◆ Impact on grantees' organizations
- ◆ Impact on the sustainability of the work funded by the grant
- ◆ Quality of the funder/grantee relationship
- ◆ Responsiveness of the Foundation's staff

Grantee Characteristics (2)

Measure	BSCF 2012	BSCF 2010	BSCF 2008	BSCF 2006	Full Dataset Median	Health-Focused Funder Median
Length of Time Which Grantees Have Regularly Conducted the Funded Programs¹						
Less than 1 year	21%	8%	10%	N/A	17%	23%
1 - 5 years	38%	57%	46%	N/A	50%	58%
6 - 10 years	9%	12%	13%	N/A	14%	10%
More than 10 years	32%	23%	31%	N/A	19%	9%
Pattern of Grantees' Funding Relationship with the Foundation²						
First grant received from the Foundation	8%	9%	N/A	N/A	29%	39%
Consistent funding in the past	85%	85%	N/A	N/A	53%	44%
Inconsistent funding in the past	6%	6%	N/A	N/A	18%	18%
Length of Funding Relationship with the Foundation³						
1 - 5 years	44%	61%	N/A	N/A	53%	64%
6 - 10 years	51%	38%	N/A	N/A	27%	30%
More than 10 years	5%	2%	N/A	N/A	20%	6%
Funding Status and Grantees Previously Declined Funding						
Percent of grantees currently receiving funding from the Foundation ⁴	96%	89%	91%	95%	75%	74%
Percent of grantees previously declined funding by the Foundation	24%	18%	21%	12%	32%	30%

BSCF Analysis – Variation by Consistency of Funding

BSCF grantees rate differently based on the consistency of funding they have received from the Foundation.

Grantees that have received consistent funding rate significantly higher than do other grantees on:

- ◆ Impact on and understanding of and grantees' fields
- ◆ Impact on grantees' organizations
- ◆ Impact on the sustainability of the work funded by the grant
- ◆ Quality of the funder/grantee relationship
- ◆ Clarity of the Foundation's communications

Survey-Wide Analysis Fact: Consistently funded grantees rate funders' understanding of their organizations as well as impact on their organizations, fields and communities more positively than inconsistently funded grantees

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

2: Represents data from 113 funders. BSCF 2008 and BSCF 2006 data not available due to changes to the survey instrument. This question includes a "don't know" response option; 2 percent of BSCF 2012 respondents answered "don't know", compared to 2 percent at the median funder, 3 percent of BSCF 2010 respondents, and 4 percent of respondents at the median health-focused funder.

3: Represents data from 113 funders. BSCF 2008 and BSCF 2006 data not available due to changes to the survey instrument. This question includes a "don't know" response option; 7 percent of BSCF 2012 respondents answered "don't know", compared to 4 percent at the median funder, 11 percent of BSCF 2010 respondents, and 8 percent of respondents at the median health-focused funder.

4: A much larger than typical proportion of BSCF grantees indicate that they are currently receiving funding. Across funders in CEP's dataset, grantees that indicate that they are currently receiving funding tend to rate higher across a variety of measures in the Grantee Perception Report.

Grantee Characteristics (3)

Measure	BSCF 2012	BSCF 2010	BSCF 2008	BSCF 2006	Full Dataset Median	Health-Focused Funder Median
Job Title of Respondents¹						
Executive Director	63%	36%	37%	35%	46%	41%
Other Senior Management	13%	18%	18%	16%	12%	15%
Project Director	5%	8%	9%	10%	10%	20%
Development Director	6%	12%	16%	15%	13%	8%
Other Development Staff	6%	12%	12%	11%	8%	6%
Volunteer	0%	0%	0%	0%	1%	1%
Other	6%	14%	8%	13%	10%	9%
Gender of Respondents²						
Female	76%	80%	77%	77%	62%	67%
Male	24%	20%	23%	23%	38%	27%
Race/Ethnicity of Respondents³						
Caucasian/White	65%	63%	71%	N/A	80%	81%
African-American/Black	5%	7%	4%	N/A	7%	7%
Hispanic/Latino	10%	11%	9%	N/A	5%	5%
Asian (incl. Indian subcontinent)	11%	10%	8%	N/A	3%	2%
Multi-racial	4%	5%	4%	N/A	2%	2%
American Indian/Alaskan Native	3%	3%	3%	N/A	1%	1%
Pacific Islander	0%	1%	0%	N/A	0%	0%
Other	2%	1%	2%	N/A	1%	1%

1: Represents data from 78 funders.

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 2012 respondents selected "other" or "prefer not to say," compared to 2 percent at the median funder.

3: In spring of 2009 CEP removed the word "optional" from this question but added a "prefer not to say" response choice. Previously this question was only infrequently skipped and so we have maintained comparative data in spite of the question change. In response to this question, a total of 5 percent of BSCF 2012 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 2012	BSCF 2010	BSCF 2008	BSCF 2006	Full Dataset Median	Health-Focused Funder Median
Financial Information						
Total assets	\$62.0MM	\$54.5MM	\$72.9MM	\$50.7MM	\$234.7MM	\$168.7MM
Total giving	\$24.5MM	\$34.7MM	\$31.5MM	\$12.7MM	\$14.6MM	\$11.3MM
Funder Staffing¹						
Total staff (FTEs)	17	17	15	9.5	12.8	11.5
Percent of staff (FTEs) actively managing grantee relationships ²	18%	29%	N/A	N/A	38%	34%
Percent of staff who are program staff	29%	47%	53%	74%	51%	43%
Grantmaking Processes						
Proportion of grants that are proactive ³	88%	98%	N/A	N/A	41%	50%
Proportion of grantmaking dollars that are proactive ⁴	94%	99%	63%	N/A	42%	61%

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

2: Includes data from 86 funders. BSCF 2008 and BSCF 2006 data not available due to changes to the survey instrument. Proactive total includes grants from BSCF's Initiatives.

3: Includes data from 99 funders. BSCF 2008 and BSCF 2006 data not available due to changes to the survey instrument. Proactive total includes grants from BSCF's Initiatives.

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

Source: Self-reported data provided by BSCF and other GPR and Operational Benchmarking Report (OBR) subscribers from 2003-2012 survey rounds.

Funders in Dataset

The 290 philanthropic funders whose grantees CEP has surveyed are listed below. Those that were independently surveyed are denoted by an asterisk (*).

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

Although our work is about measuring results, providing useful data, and improving performance, our ultimate goal is improving lives. We believe this can only be achieved through a powerful combination of dispassionate analysis and passionate commitment to creating a better society.

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>Indicators of Effectiveness: Understanding and Improving Foundation Performance</i> (2002)
	<i>Assessing Performance at the Robert Wood Johnson Foundation: A Case Study</i> (2004)
	<i>The State of Foundation Performance Assessment: A Survey of Foundation CEOs</i> (2011)
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)
	<i>Rhetoric versus Reality: A Strategic Disconnect at Community Foundations</i> (2011)
Funder Governance	<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>More than Money: Making a Difference with Assistance Beyond the Grant</i> (2008)
	<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)
	<i>Can Feedback Fuel Change at Foundations?</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)

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
- **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
- **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
- **Strategy Landscape Tool (SLT):** an online interactive visualization tool, developed by Monitor Institute and delivered with CEP, that allows users to easily see and understand grantmaking strategies and patterns within and across institutions so they can make better decisions in pursuit of their goals

Contact Information

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