

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

Program Area Report

PREPARED FOR

**Madison Initiative**

The William and Flora Hewlett Foundation

JANUARY 2016



THE CENTER FOR  
EFFECTIVE PHILANTHROPY

675 Massachusetts Avenue  
7th Floor  
Cambridge, MA 02139  
Tel: (617) 492-0800  
Fax: (617) 492-0888

131 Steuart Street  
Suite 501  
San Francisco, CA 94105  
Tel: (415) 391-3070  
Fax: (415) 956-9916

[www.effectivephilanthropy.org](http://www.effectivephilanthropy.org)

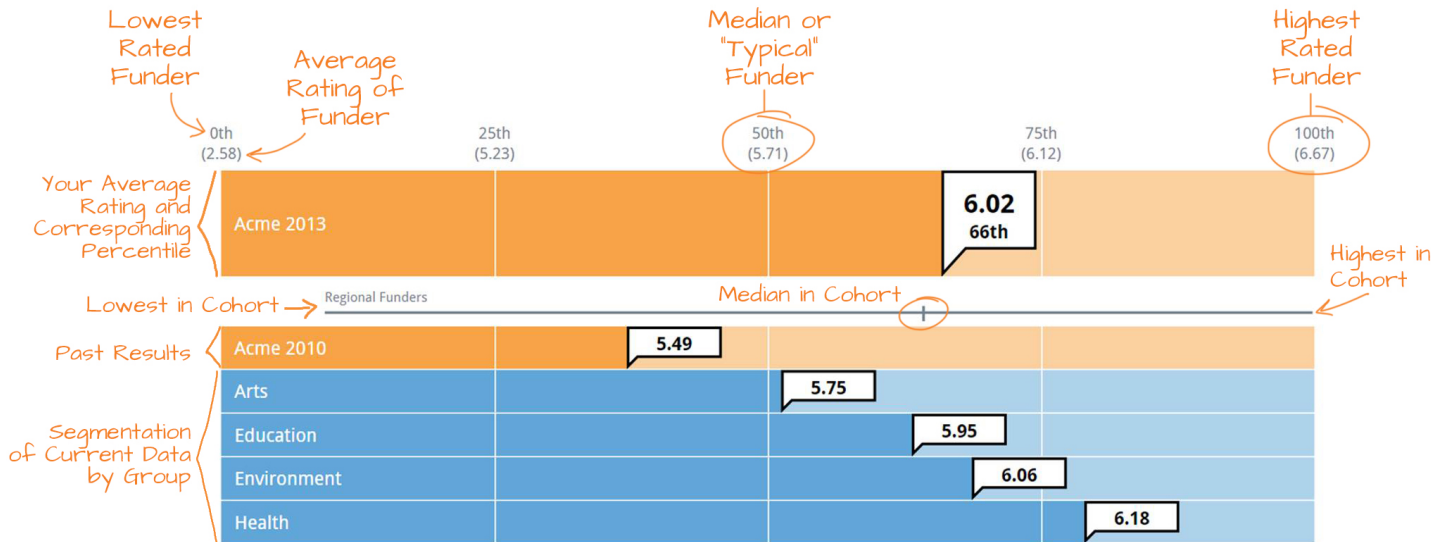
The online version of this report can be accessed at [cep.surveymresults.org](http://cep.surveymresults.org).

# TABLE OF CONTENTS

<b>HOW TO READ CHARTS</b>	<b>3</b>
<b>SURVEY POPULATION</b>	<b>4</b>
<b>GRANTMAKING CHARACTERISTICS</b>	<b>7</b>
<b>IMPACT ON GRANTEES' FIELDS AND LOCAL COMMUNITIES</b>	<b>10</b>
Field-Focused Measures	10
Community-Focused Measures	12
<b>IMPACT ON GRANTEES' ORGANIZATIONS</b>	<b>14</b>
<b>FUNDER-GRANTEE RELATIONSHIPS</b>	<b>20</b>
Interactions Measures	21
Communications Measures	25
<b>GRANT PROCESSES</b>	<b>39</b>
Selection Process	40
Reporting and Evaluation Process	45
<b>DOLLAR RETURN AND TIME SPENT ON PROCESSES</b>	<b>52</b>
Time Spent on Processes	53
<b>NON-MONETARY ASSISTANCE</b>	<b>55</b>
<b>CONTEXTUAL DATA</b>	<b>62</b>
Grant Length, Type, and Size	62
Grantee Characteristics	66
Funder Characteristics	70
<b>ABOUT CEP</b>	<b>71</b>

# The William and Flora Hewlett Foundation 2015 GPR - Madison Initiative

## INTERPRETING YOUR CHARTS



### STATISTICAL SIGNIFICANCE OF CHANGES OVER TIME

CEP compares your past ratings to your current ratings, testing for statistically significant differences. An asterisk in your current results denotes a statistically significant difference between your current rating and the previous rating.

5.81\*  
60th

## SURVEY POPULATION

Survey	Survey Fielded	Year of Active Grants	Number of Responses Received	Survey Response Rate
Hewlett 2015	September and October 2015	June 2014 - May 2015	707	62%

Program	Number of Responses
Madison Initiative 2015	39

Throughout this report, The William and Flora Hewlett Foundation's survey results are compared to CEP's broader dataset of more than 40,000 grantees built up over more than a decade of grantee surveys of more than 250 funders. The full list of participating funders can be found at <http://www.effectivephilanthropy.org/assessments/gpr-apr/>.

In order to protect the confidentiality of respondents results are not shown when CEP received fewer than five responses to a specific question.

## COMPARATIVE COHORTS

### CUSTOMIZED COHORT

Hewlett selected a set of 15 funders to create a smaller comparison group that more closely resembles Hewlett in scale and scope.

#### Custom Cohort

Bill & Melinda Gates Foundation
Carnegie Corporation of New York
Doris Duke Charitable Foundation
Ford Foundation
Gordon and Betty Moore Foundation
John D. and Catherine T. MacArthur Foundation
John S. and James L. Knight Foundation
Robert Wood Johnson Foundation
The Children's Investment Fund Foundation
The David and Lucile Packard Foundation
The James Irvine Foundation
The Kresge Foundation
The Rockefeller Foundation
The William and Flora Hewlett Foundation
W.K. Kellogg Foundation

### STANDARD COHORTS

CEP also included 16 standard cohorts to allow for comparisons to a variety of different types of funders. A full list of standard cohorts and descriptions is below.

#### Strategy Cohorts

Cohort Name	Count	Description
Small Grant Providers	44	Funders with median grant size of \$20K or less
Large Grant Providers	48	Funders with median grant size of \$200K or more
High Touch Funders	21	Funders for which a majority of grantees report having contact with their primary contact monthly or more often
Intensive Non-Monetary Assistance Providers	30	Funders that provide at least 30% of grantees with comprehensive or field-focused assistance as defined by CEP
Proactive Grantmakers	45	Funders that make at least 90% of grants proactively
Reactive Grantmakers	44	Funders that make at most 10% of grants proactively
International Funders	37	Funders with an international scope of work

#### Annual Giving Cohorts

Cohort Name	Count	Description
Funders Giving Less Than \$5 Million	52	Funders with annual giving of less than \$5 million
Funders Giving \$50 Million Or More	47	Funders with annual giving of \$50 million or more

## Foundation Type Cohorts

Cohort Name	Count	Description
Private Foundations	125	All private foundations in the GPR dataset
Family Foundations	43	All family foundations in the GPR dataset
Community Foundations	31	All community foundations in the GPR dataset
Health Conversion Foundations	25	All health conversion foundations in the GPR dataset
Corporate Foundations	16	All corporate foundations in the GPR dataset

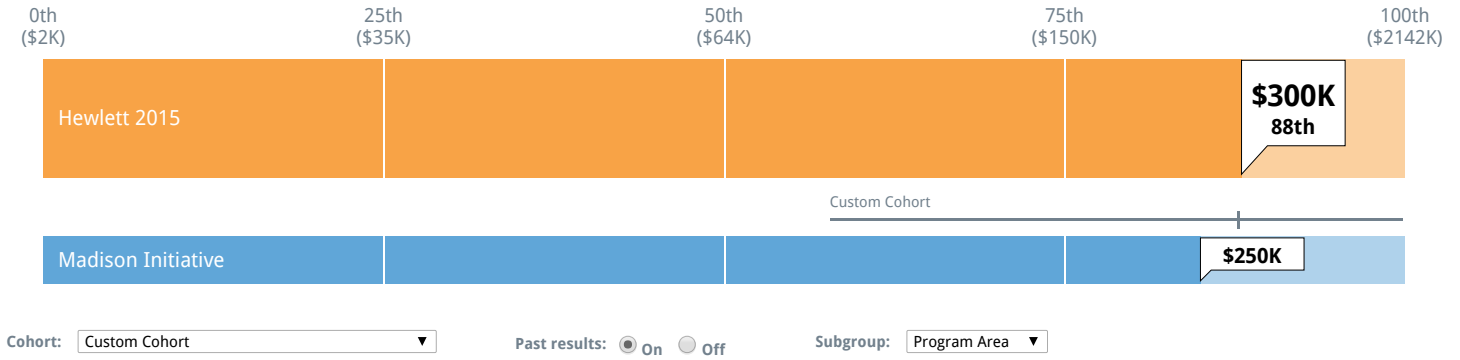
## Other Cohorts

Cohort Name	Count	Description
Funders Outside the United States	20	Funders that are primarily based outside the United States
Recently Established Foundations	41	Funders that were established in 2000 or later

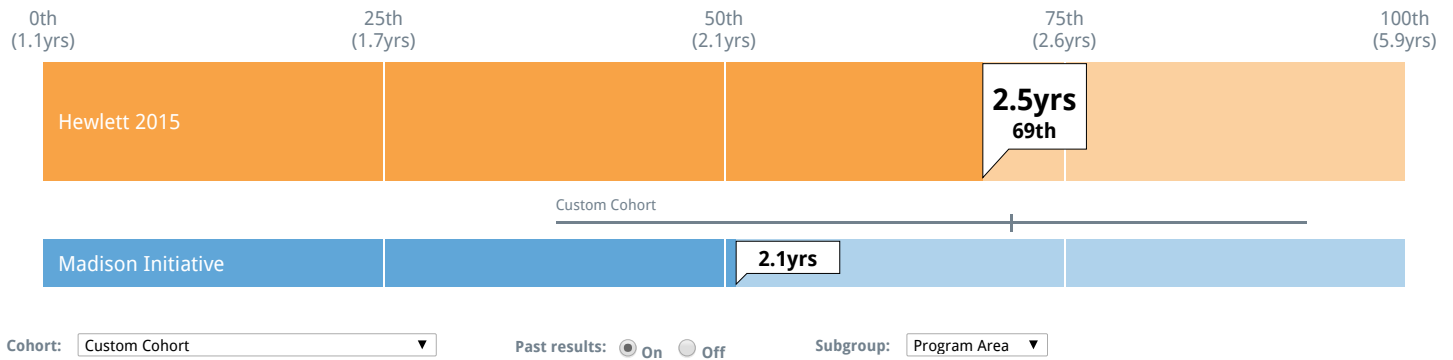
# GRANTMAKING CHARACTERISTICS

Foundations make different choices about the ways they organize themselves, structure their grants, and the types of grantees they support. The following charts and tables show some of these important characteristics. The information is based on self-reported data from funders and grantees, and further detail is available in the Contextual Data section of this report.

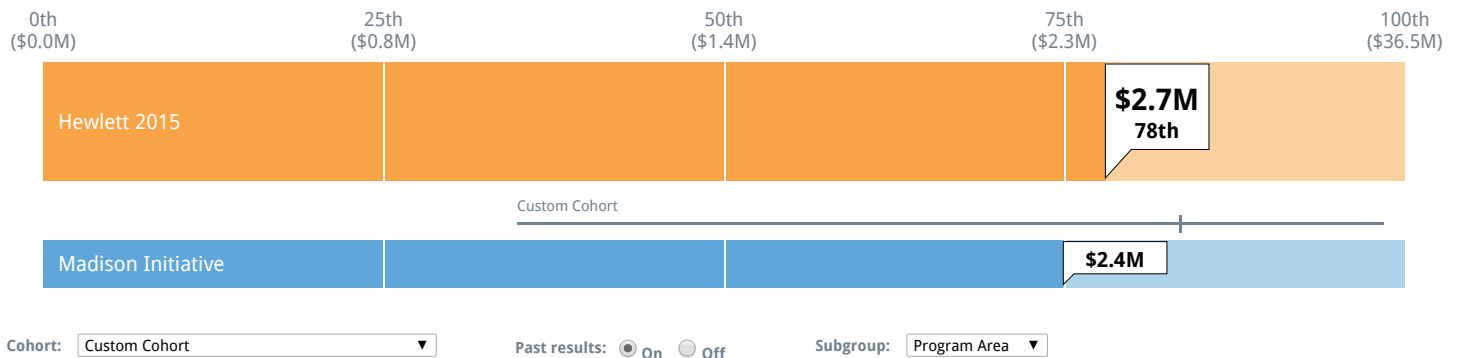
## Median Grant Size



## Average Grant Length



## Typical Organizational Budget



Type of Support (Overall)	Hewlett 2015	Average Funder	Custom Cohort
Percent of grantees receiving general operating/core support	44%	20%	14%
Percent of grantees receiving program/project support	51%	64%	75%
Percent of grantees receiving other types of support	5%	15%	10%

Type of Support (By Subgroup)	Madison Initiative
Percent of grantees receiving general operating/core support	31%
Percent of grantees receiving program/project support	59%
Percent of grantees receiving other types of support	10%

Grant History (Overall)	Hewlett 2015	Average Funder	Custom Cohort
Percentage of first-time grants	20%	29%	34%

Grant History (By Subgroup)	Madison Initiative
Percentage of first-time grants	66%



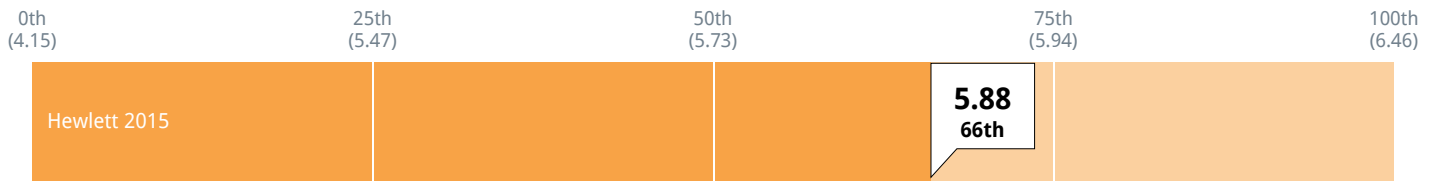
# FOUNDATION-WIDE

Program Staff Load (Overall)	Hewlett 2015	Median Funder	Custom Cohort
Dollars awarded per program staff full-time employee	\$9.2M	\$2.7M	\$5.4M
Applications per program full-time employee	16	30	16
Active grants per program full-time employee	27	33	25

## IMPACT ON AND UNDERSTANDING OF GRANTEES' FIELDS

### "Overall, how would you rate the Foundation's impact on your field?"

1 = No impact    7 = Significant positive impact



Custom Cohort

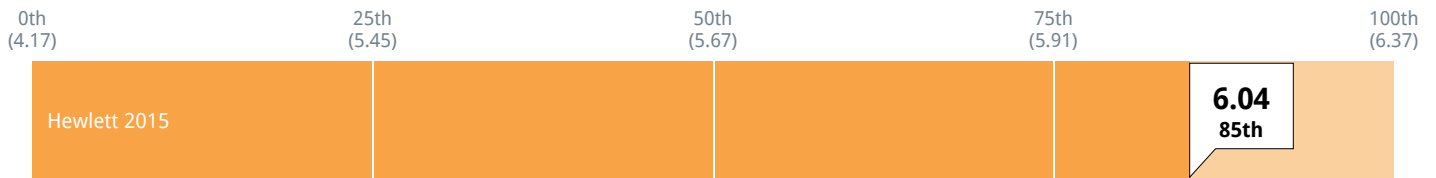
Cohort: Custom Cohort

Past results:  On  Off

Subgroup: Program Area

### "How well does the Foundation understand the field in which you work?"

1 = Limited understanding of the field    7 = Regarded as an expert in the field



Custom Cohort

Cohort: Custom Cohort

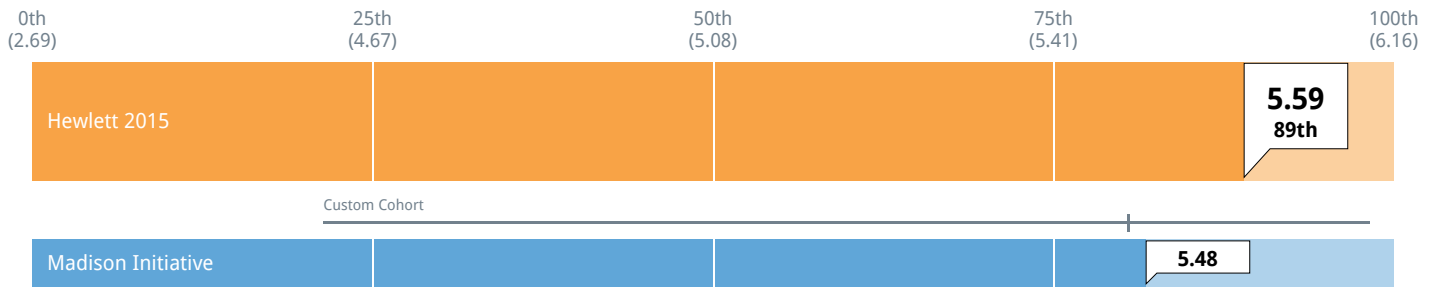
Past results:  On  Off

Subgroup: Program Area

# Advancing Knowledge and Public Policy

## "To what extent has the Foundation advanced the state of knowledge in your field?"

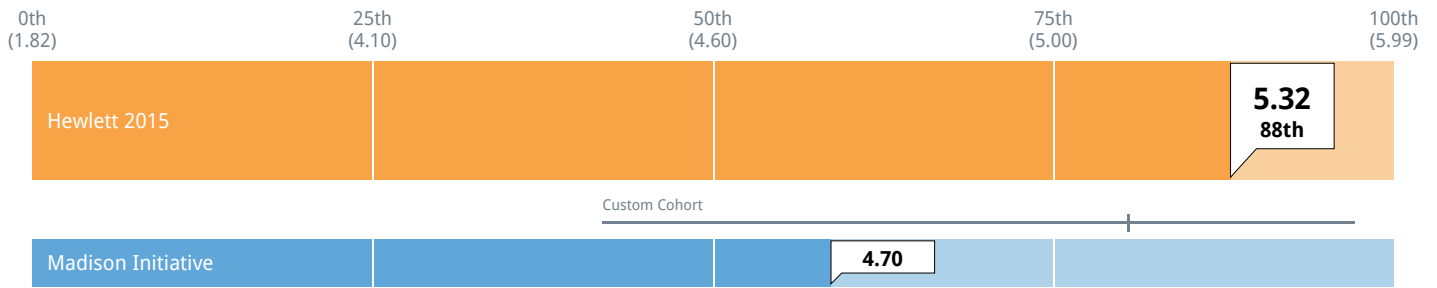
1 = Not at all    7 = Leads the field to new thinking and practice



Cohort:  Past results:  On  Off Subgroup:

## "To what extent has the Foundation affected public policy in your field?"

1 = Not at all    7 = Major influence on shaping public policy

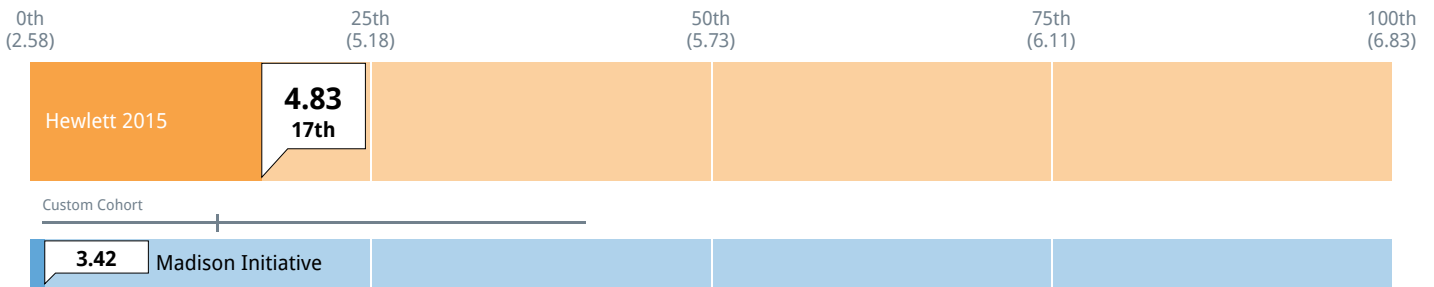


Cohort:  Past results:  On  Off Subgroup:

# IMPACT ON AND UNDERSTANDING OF GRANTEES' LOCAL COMMUNITIES

## “Overall, how would you rate the Foundation’s impact on your local community?”

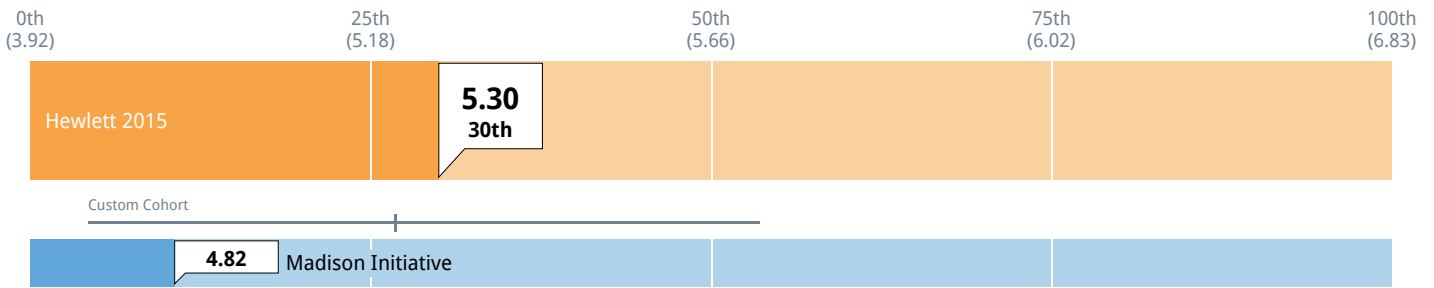
1 = No impact    7 = Significant positive impact



Cohort:  Past results:  On  Off Subgroup:

## “How well does the Foundation understand the local community in which you work?”

1 = Limited understanding of the community    7 = Regarded as an expert on the community

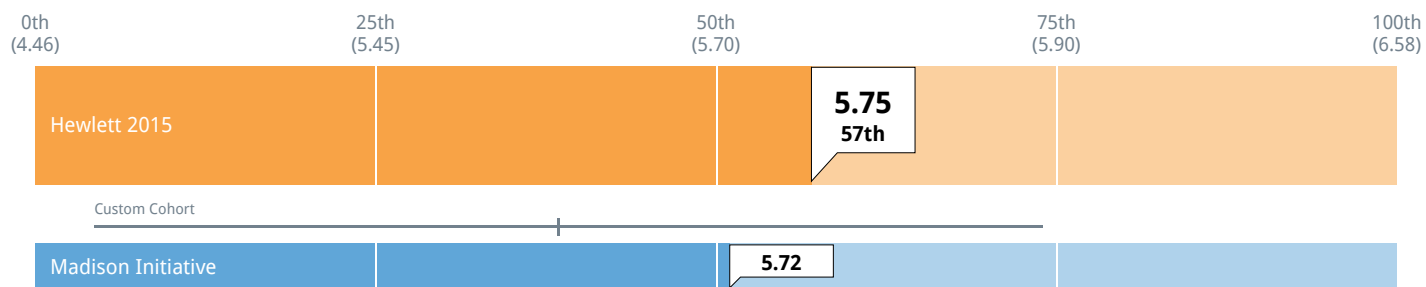


Cohort:  Past results:  On  Off Subgroup:

## Understanding of Contextual Factors

“How well does the Foundation understand the social, cultural, or socioeconomic factors that affect your work?”

1 = Limited understanding    7 = Thorough understanding



Cohort:

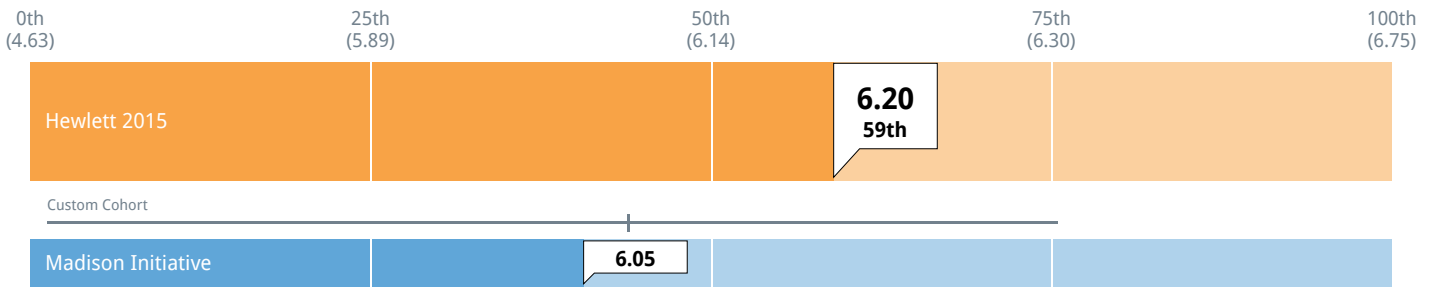
Past results:  On  Off

Subgroup:

## IMPACT ON AND UNDERSTANDING OF GRANTEES' ORGANIZATIONS

### "Overall, how would you rate the Foundation's impact on your organization?"

1 = No impact    7 = Significant positive impact



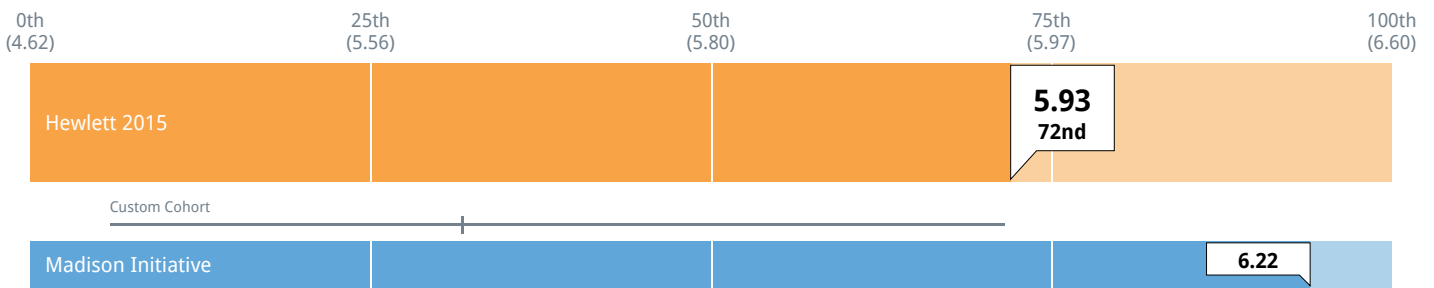
Cohort: Custom Cohort

Past results:  On  Off

Subgroup: Program Area

### "How well does the Foundation understand your organization's strategy and goals?"

1 = Limited understanding    7 = Thorough understanding



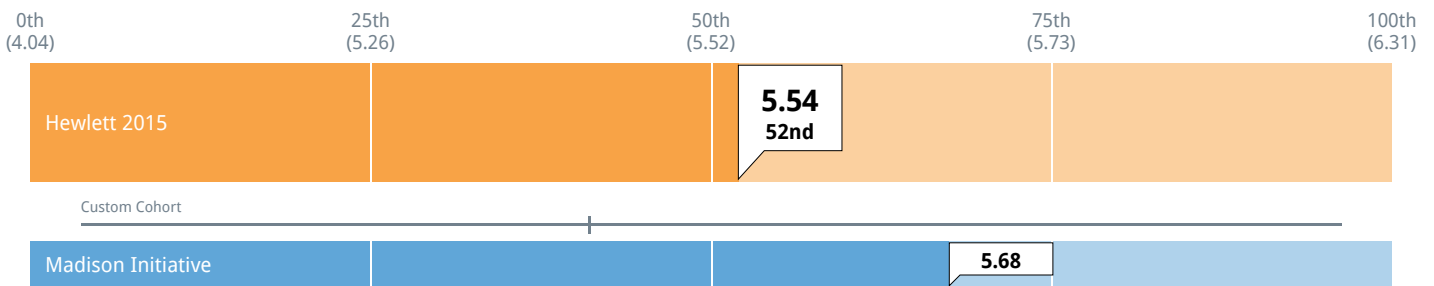
Cohort: Custom Cohort

Past results:  On  Off

Subgroup: Program Area

### "How much, if at all, did the Foundation improve your ability to sustain the work funded by this grant in the future?"

1 = Did not improve ability    7 = Substantially improved ability



Cohort: Custom Cohort

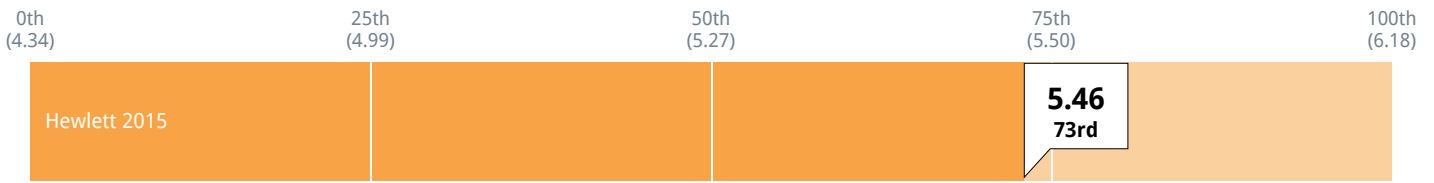
Past results:  On  Off

Subgroup: Program Area

# Grantee Challenges

## "How aware is the Foundation of the challenges that your organization is facing?"

1 = Not at all aware    7 = Extremely aware



Custom Cohort

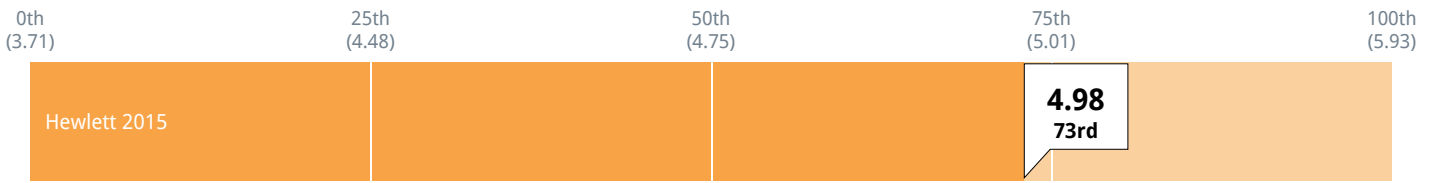
Cohort: Custom Cohort

Past results:  On  Off

Subgroup: Program Area

## "To what extent does the Foundation take advantage of its various resources to help your organization address its challenges?"

1 = Not at all    7 = To a very great extent



Custom Cohort

Cohort: Custom Cohort

Past results:  On  Off

Subgroup: Program Area

## Effect of Grant on Organization

"Which of the following statements best describes the primary effect the receipt of this grant had on your organization's programs or operations?"

Primary Effect of Grant on Grantee's Organization (Overall)	Hewlett 2015	Average Funder	Custom Cohort
Enhanced Capacity	40%	29%	22%
Expanded Existing Program Work	23%	26%	30%
Maintained Existing Program	18%	20%	13%
Added New Program Work	19%	25%	35%

Primary Effect of Grant on Grantee's Organization (By Subgroup)	Madison Initiative
Enhanced Capacity	33%
Expanded Existing Program Work	19%
Maintained Existing Program	6%
Added New Program Work	42%



## OE Capacity Building Grants

"Have you received a supplemental Organizational Effectiveness capacity building grant in addition to your primary grant from Hewlett?"

### OE Recipients - Overall

■ Yes ■ No



### OE Recipients - Madison Initiative

■ Yes ■ No



# "What was the purpose of the Organizational Effectiveness capacity building grant?"

## Purpose of OE Capacity Building Grant - Overall

Hewlett 2015



## Purpose of OE Capacity Building Grant - Madison Initiative

Madison Initiative

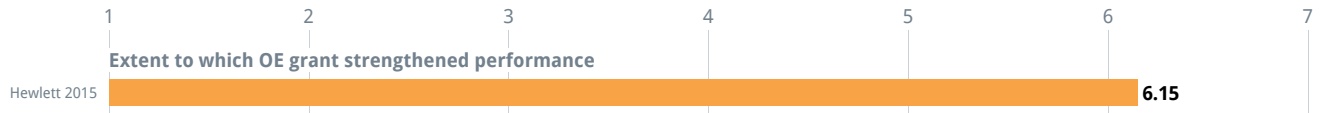


**"To what extent has the Organizational Effectiveness grant strengthened the performance of your organization?"**

(1 = Not at all, 7 = To a great extent)

**OE Contribution to Organizations' Performance - Overall**

■ Hewlett 2015



CEP did not receive enough responses to show average ratings for this question for Madison Initiative grantees.

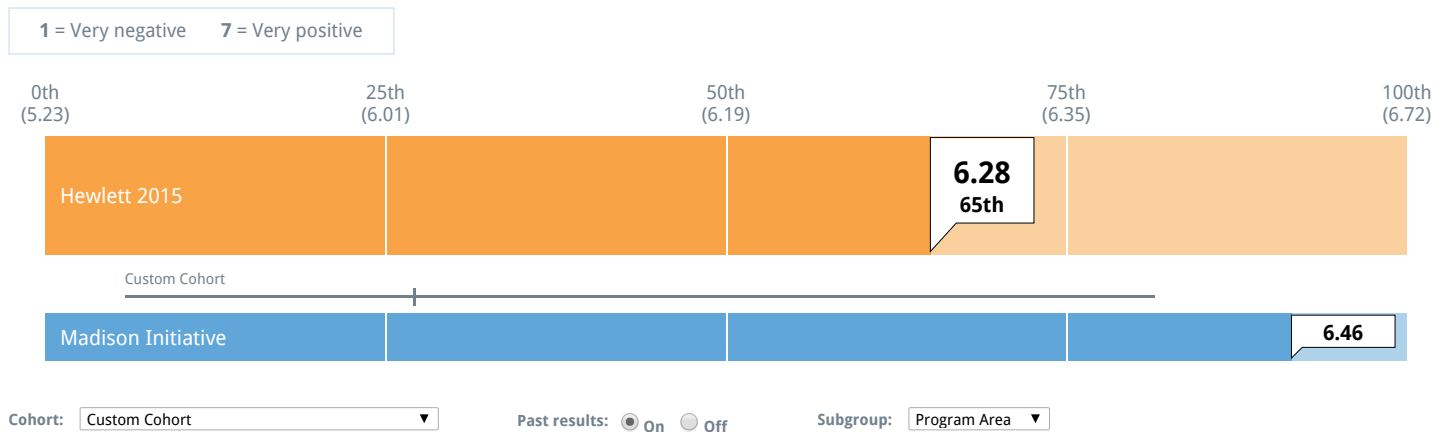
# FUNDER-GRANTEE RELATIONSHIPS

## Funder-Grantee Relationships Summary Measure

The quality of interactions and the clarity and consistency of communications together create the larger construct that CEP refers to as “relationships.” The relationships measure below is an average of grantee ratings on the following measures:

1. Fairness of treatment by the foundation
2. Comfort approaching the foundation if a problem arises
3. Responsiveness of foundation staff
4. Clarity of communication of the foundation's goals and strategy
5. Consistency of information provided by different communications

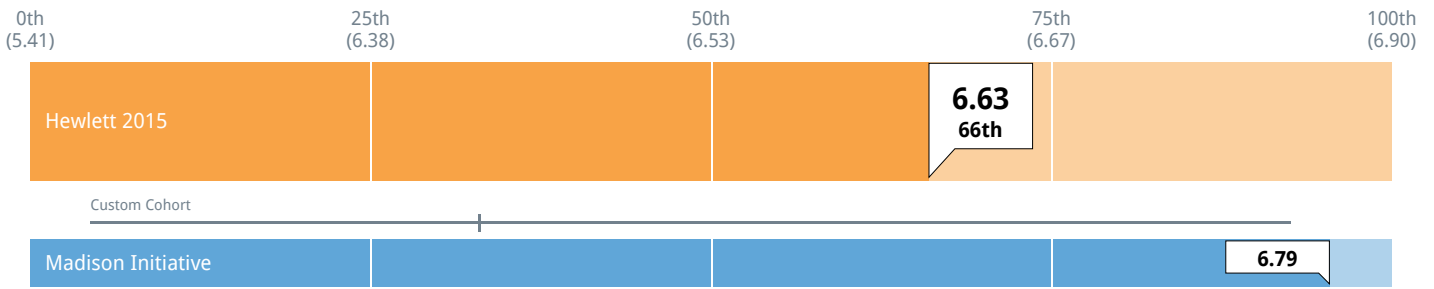
## Funder-Grantee Relationships Summary Measure



# Quality of Interactions

## “Overall, how fairly did the Foundation treat you?”

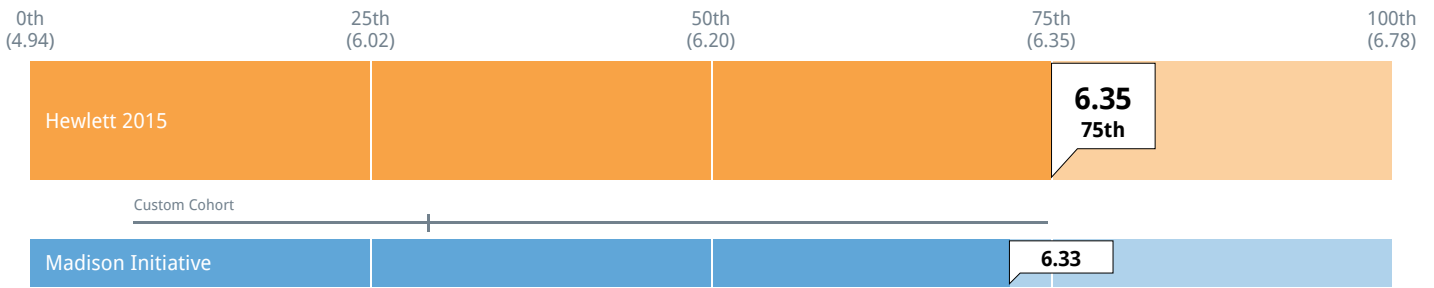
1 = Not at all fairly 7 = Extremely fairly



Cohort: Custom Cohort Past results:  On  Off Subgroup: Program Area

## “How comfortable do you feel approaching the Foundation if a problem arises?”

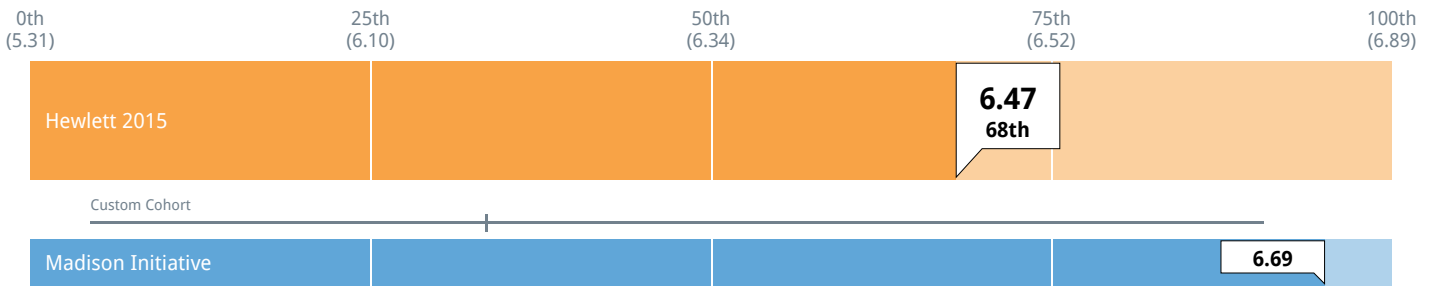
1 = Not at all comfortable 7 = Extremely comfortable



Cohort: Custom Cohort Past results:  On  Off Subgroup: Program Area

## “Overall, how responsive was the Foundation staff?”

1 = Not at all responsive 7 = Extremely responsive



Cohort: Custom Cohort Past results:  On  Off Subgroup: Program Area

## Interaction Patterns

### "HOW OFTEN DO/DID YOU HAVE CONTACT WITH YOUR PROGRAM OFFICER DURING THIS GRANT?"

Frequency of Contact with Program Officer (Overall)	Hewlett 2015	Average Funder	Custom Cohort
Weekly or more often	1%	3%	3%
A few times a month	9%	11%	14%
Monthly	18%	14%	19%
Once every few months	63%	51%	52%
Yearly or less often	10%	22%	12%

Frequency of Contact with Program Officer (By Subgroup)	Madison Initiative
Weekly or more often	0%
A few times a month	10%
Monthly	26%
Once every few months	64%
Yearly or less often	0%

# “WHO MOST FREQUENTLY INITIATED THE CONTACT YOU HAD WITH YOUR PROGRAM OFFICER?”

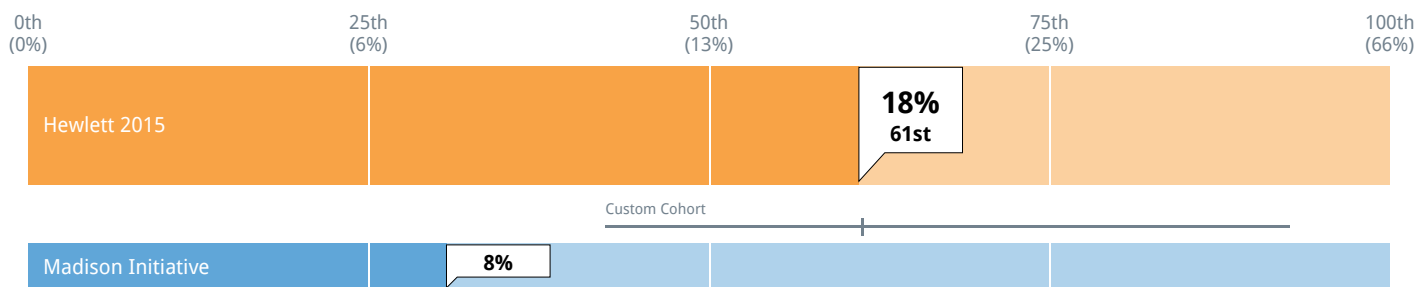
Initiation of Contact with Program Officer (Overall)	Hewlett 2015	Average Funder	Custom Cohort
Program Officer	11%	15%	12%
Both of equal frequency	59%	49%	52%
Grantee	31%	36%	36%

Initiation of Contact with Program Officer (By Subgroup)	Madison Initiative
Program Officer	14%
Both of equal frequency	70%
Grantee	16%

## Contact Change and Site Visits

### "Has your main contact at the Foundation changed in the past six months?"

Proportion of grantees responding 'Yes'



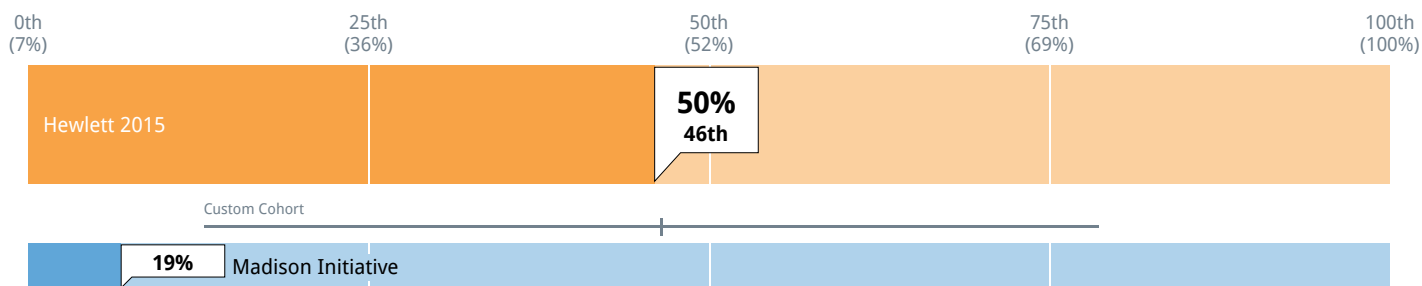
Cohort: Custom Cohort

Past results:  On  Off

Subgroup: Program Area

### "Did the Foundation conduct a site visit during the course of this grant?"

Proportion of grantees responding 'Yes'



Cohort: Custom Cohort

Past results:  On  Off

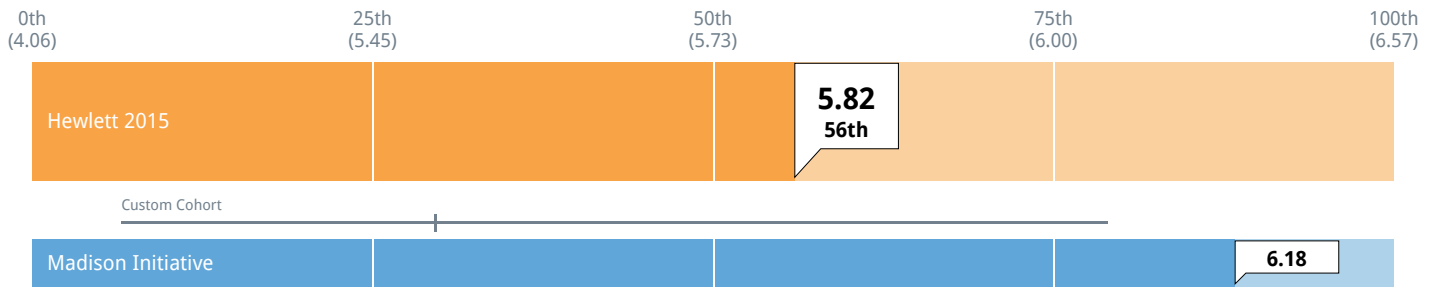
Subgroup: Program Area



# Foundation Communication

## “How clearly has the Foundation communicated its goals and strategy to you?”

1 = Not at all clearly    7 = Extremely clearly



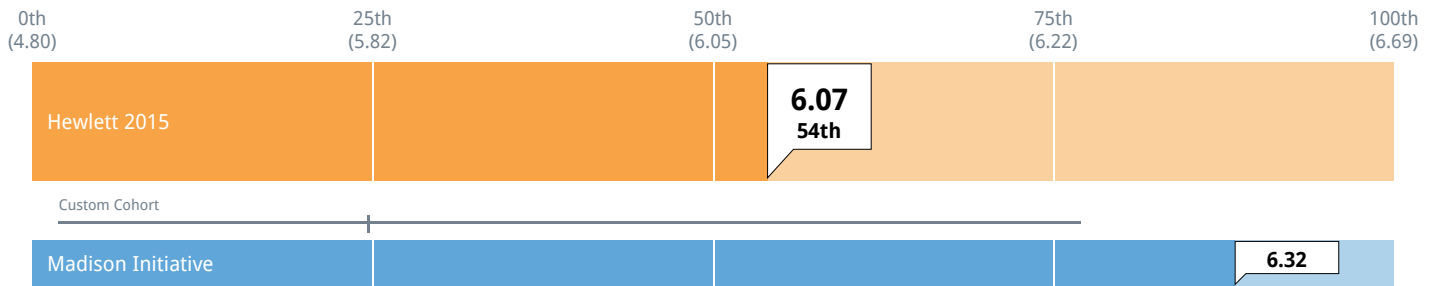
Cohort: Custom Cohort

Past results:  On  Off

Subgroup: Program Area

## “How consistent was the information provided by different communications resources, both personal and written, that you used to learn about the Foundation?”

1 = Not at all consistent    7 = Completely consistent



Cohort: Custom Cohort

Past results:  On  Off

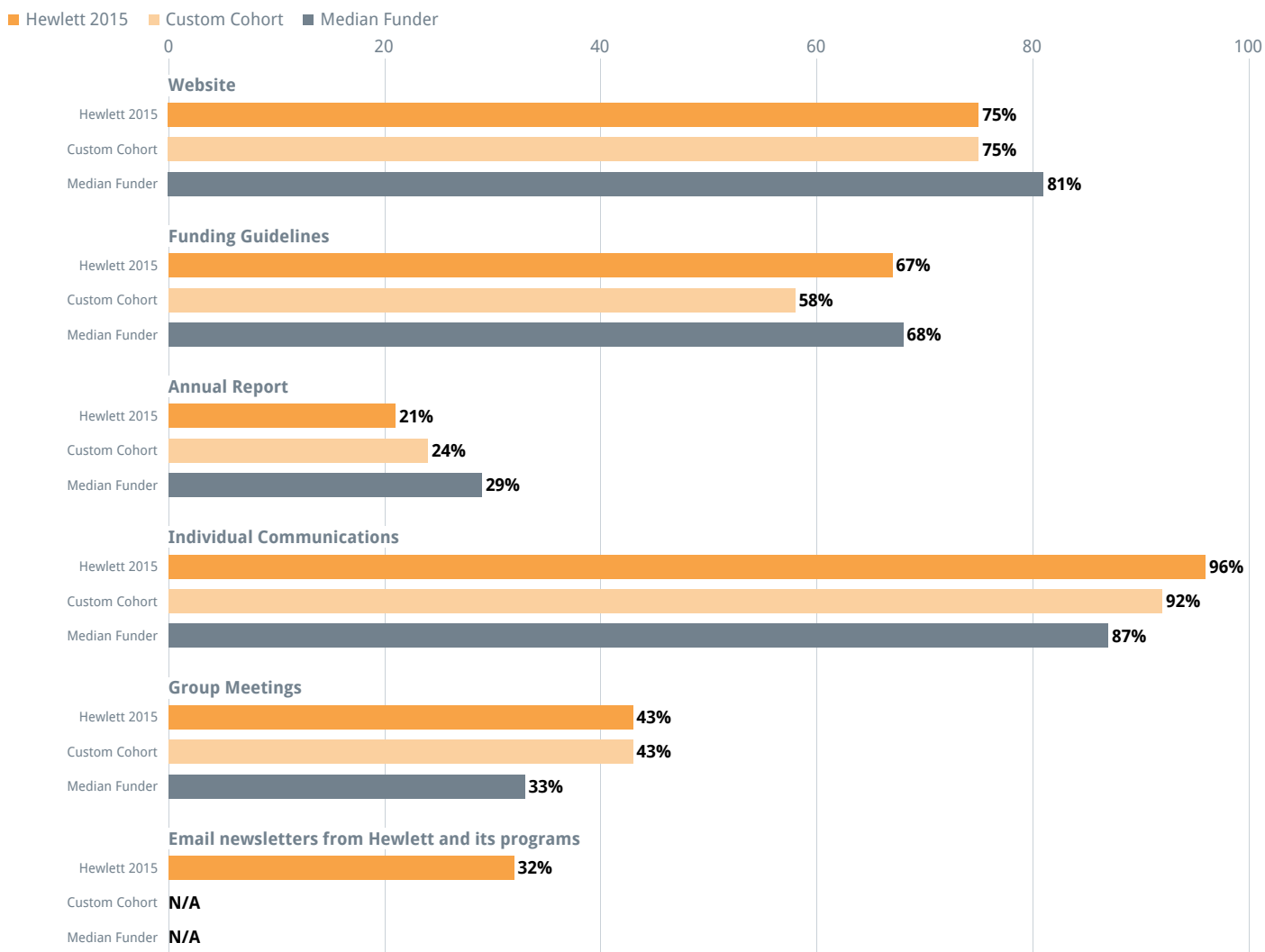
Subgroup: Program Area

## Communication Resources

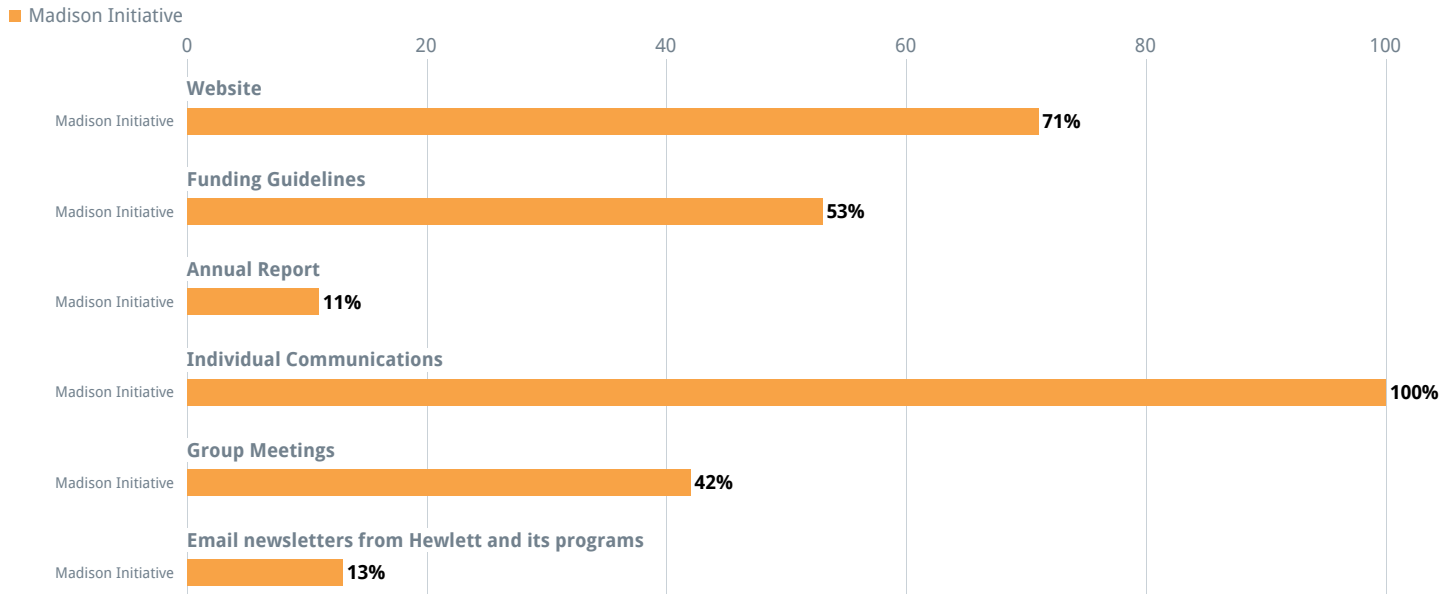
Grantees were asked whether they used each of the following communications resources from Hewlett and how helpful they found each resource. This chart shows the proportion of grantees who have used each resource.

"Please indicate whether you used any of the following resources, and if so how helpful you found each."

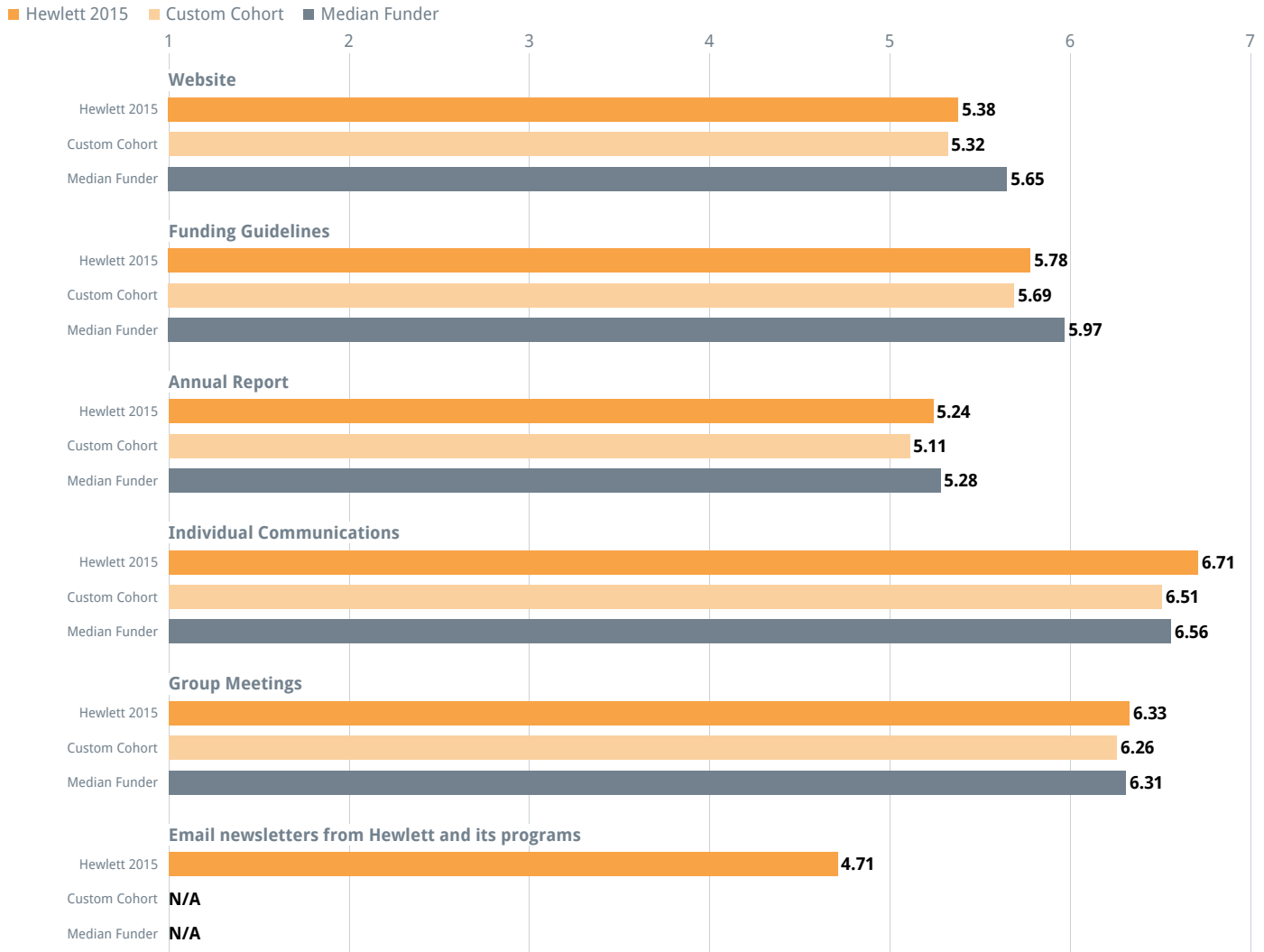
### Usage of Communication Resources - Overall



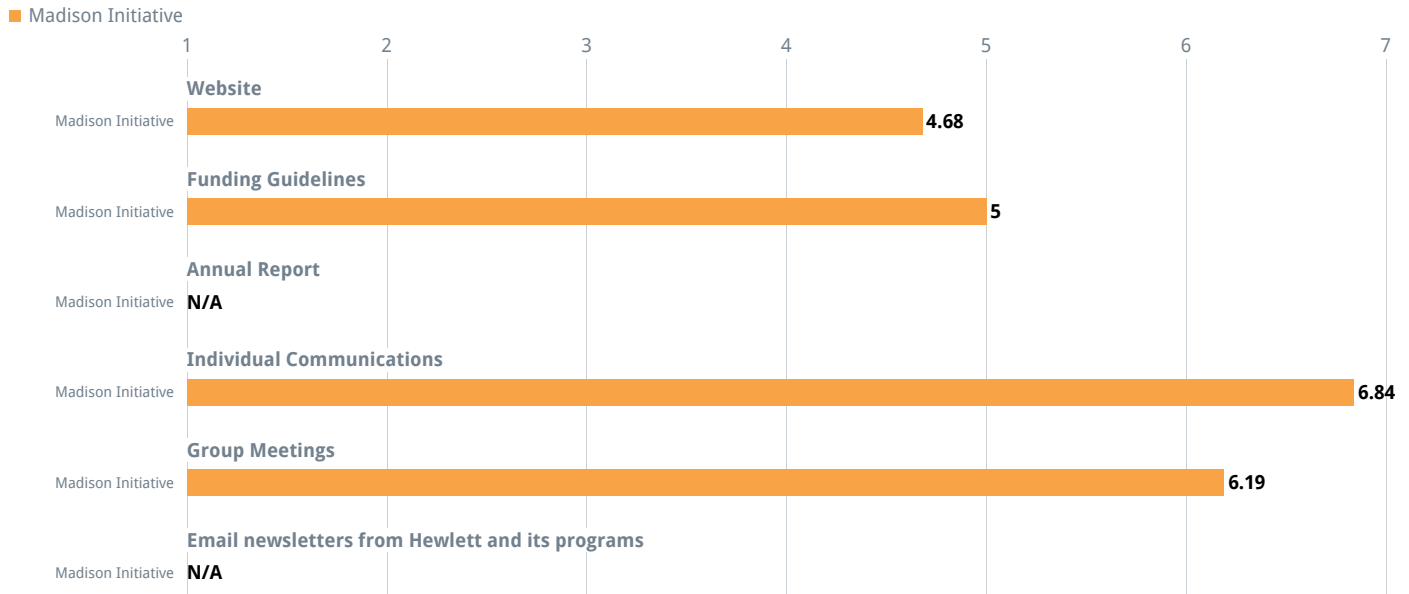
## Usage of Communication Resources - Madison Initiative



## Helpfulness of Communication Resources - Overall



## Helpfulness of Communication Resources - Madison Initiative



## Additional Questions Related to Communication and Resources

"How often do you visit the Hewlett website?"

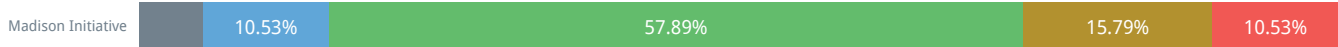
### Frequency of Website Usage - Overall

Weekly or more often   A few times a month   Monthly   Once every few months   Yearly or less often   Never



### Frequency of Website Usage - Madison Initiative

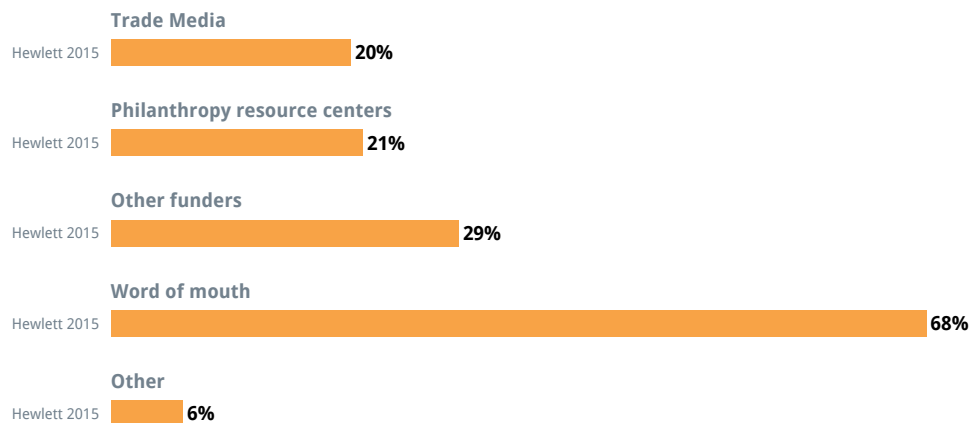
Weekly or more often   A few times a month   Monthly   Once every few months   Yearly or less often   Never



## "Apart from direct interaction with Hewlett staff, how do you learn about the Foundation's grantmaking priorities?"

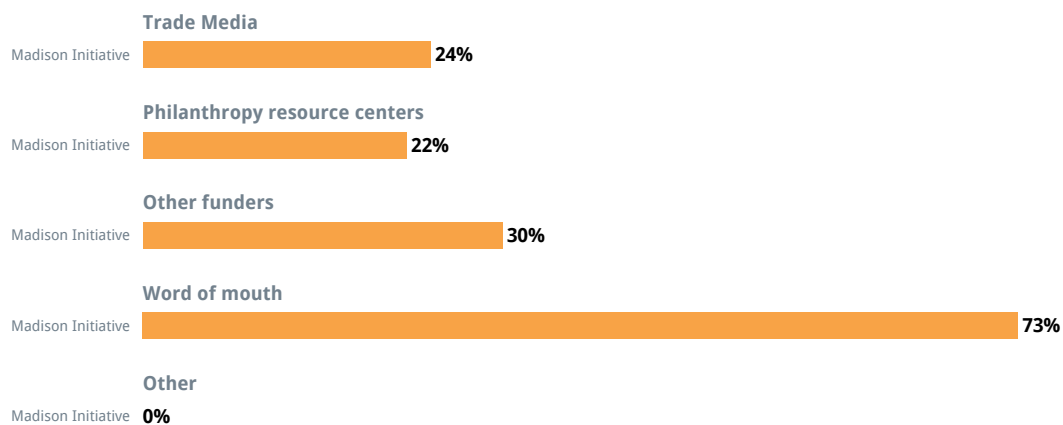
### Source of Knowledge Regarding Grantmaking Priorities - Overall

■ Hewlett 2015



### Source of Knowledge Regarding Grantmaking Priorities - Madison Initiative

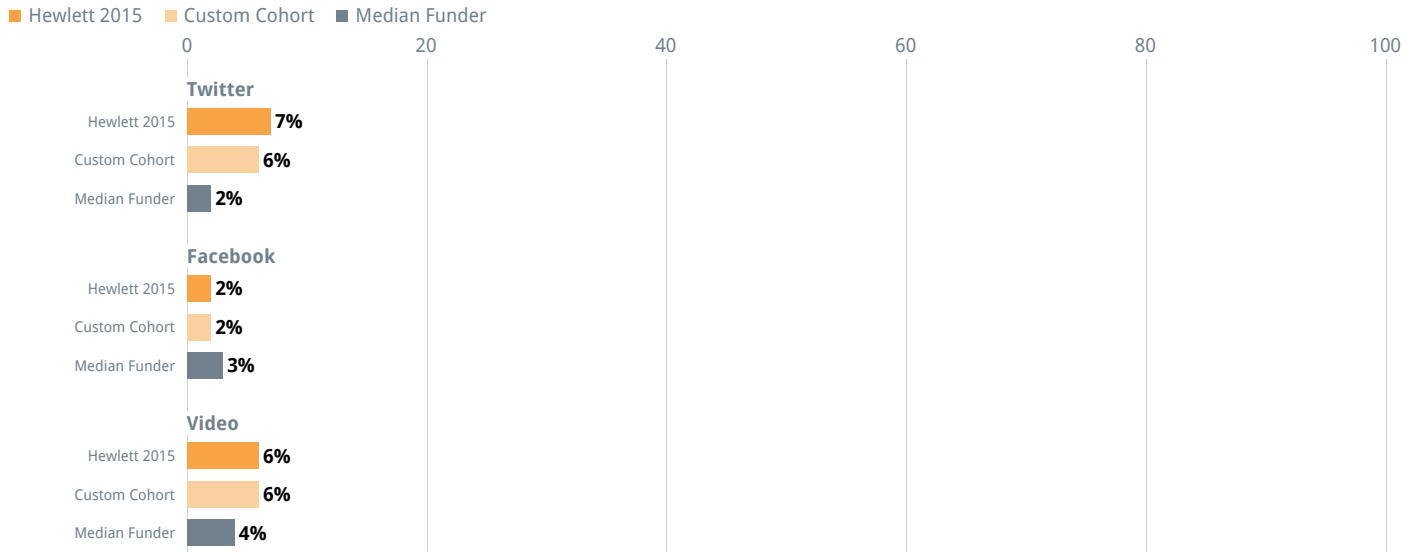
■ Madison Initiative



## Social Media

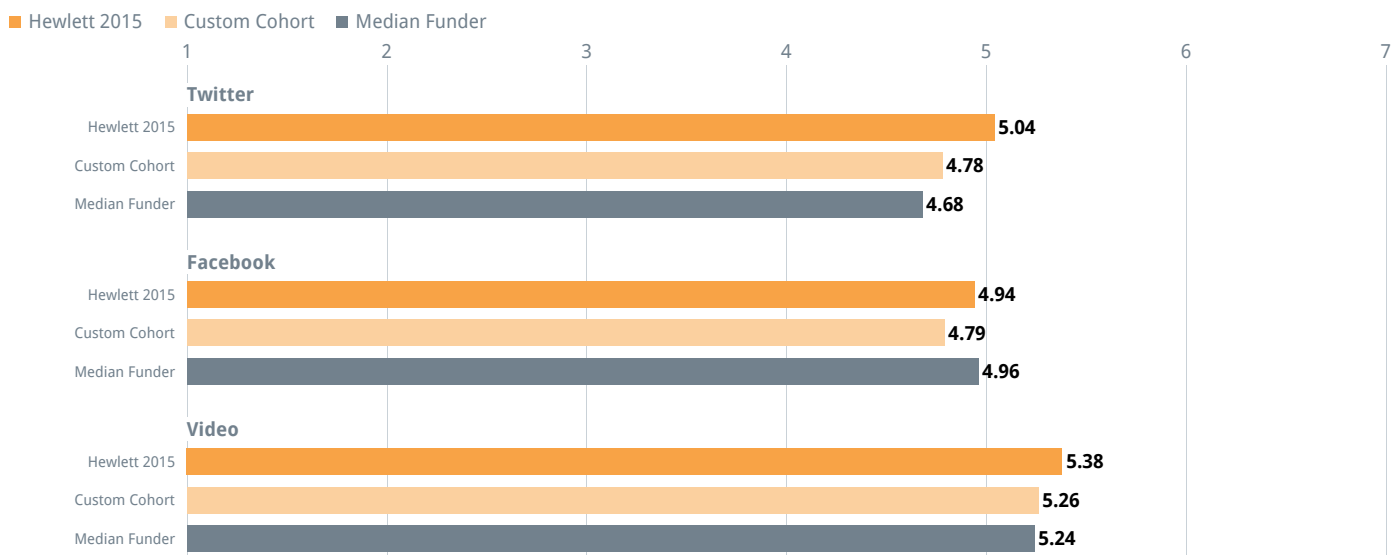
Grantees were asked whether they used each of the following communications resources from Hewlett and how helpful they found each resource. This chart shows the proportion of grantees who have used each resource.

### Usage of Communication Resources - Overall



The chart below shows the perceived helpfulness of each resource, where 1 = "Not at all helpful" and 7 = "Extremely helpful."

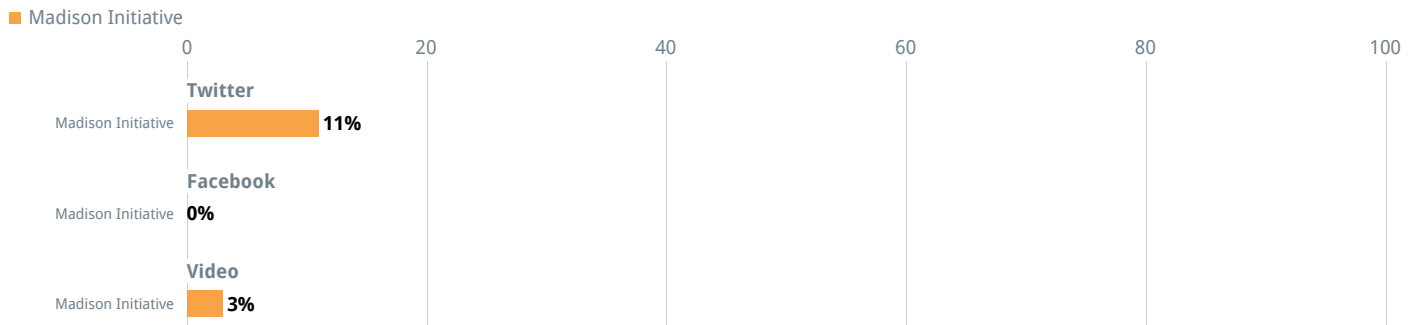
### Helpfulness of Communication Resources - Overall





The charts below show the usage of social media for Madison Initiative grantees. There were not enough respondents to show the helpfulness ratings for Madison Initiative grantees.

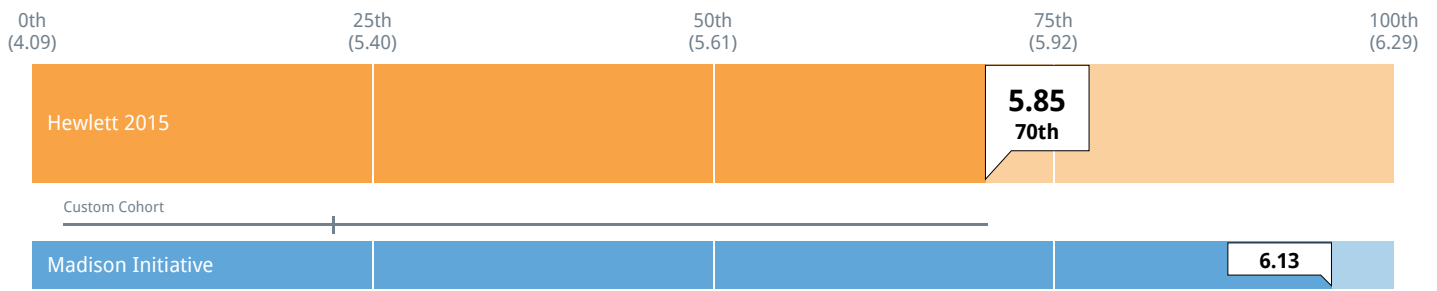
### Usage of Communication Resources - Madison Initiative



# Funder Transparency

## "Overall how transparent is the Foundation with your organization?"

1 = Not at all transparent    7 = Extremely transparent



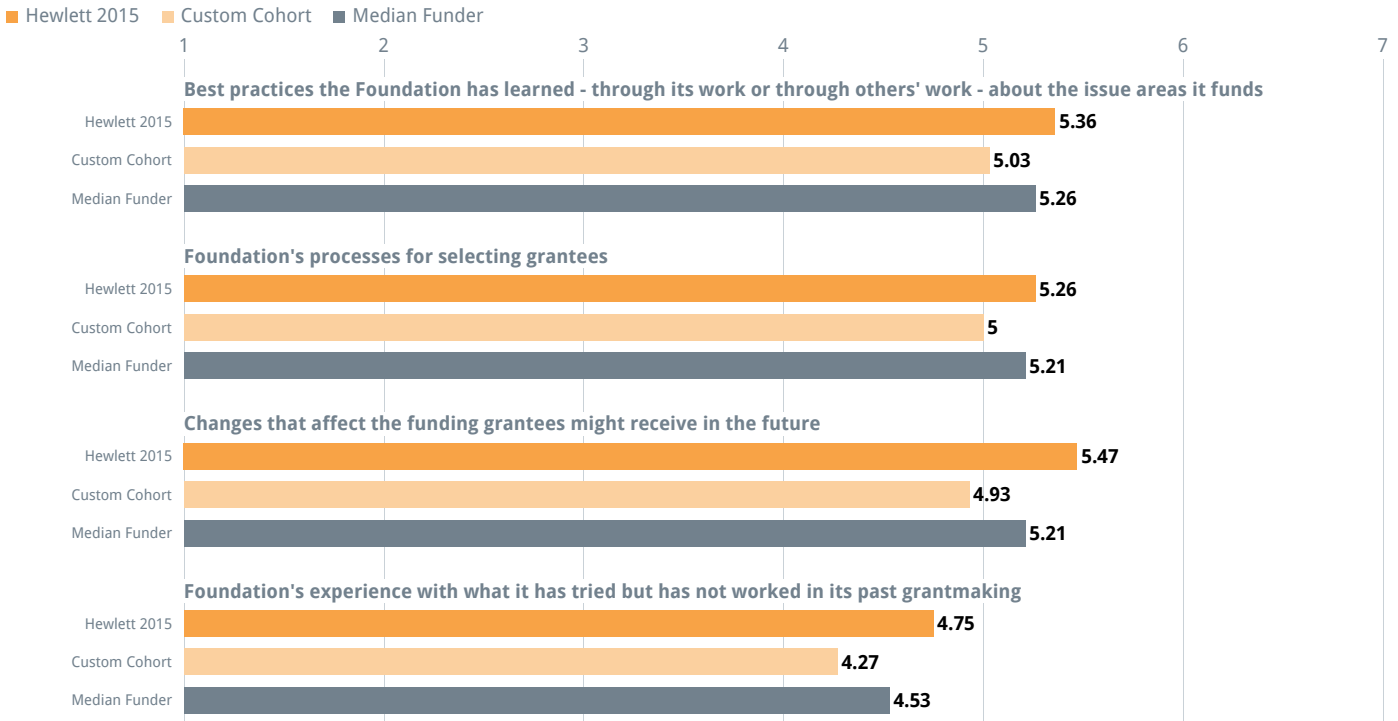
Cohort:

Past results:  On  Off

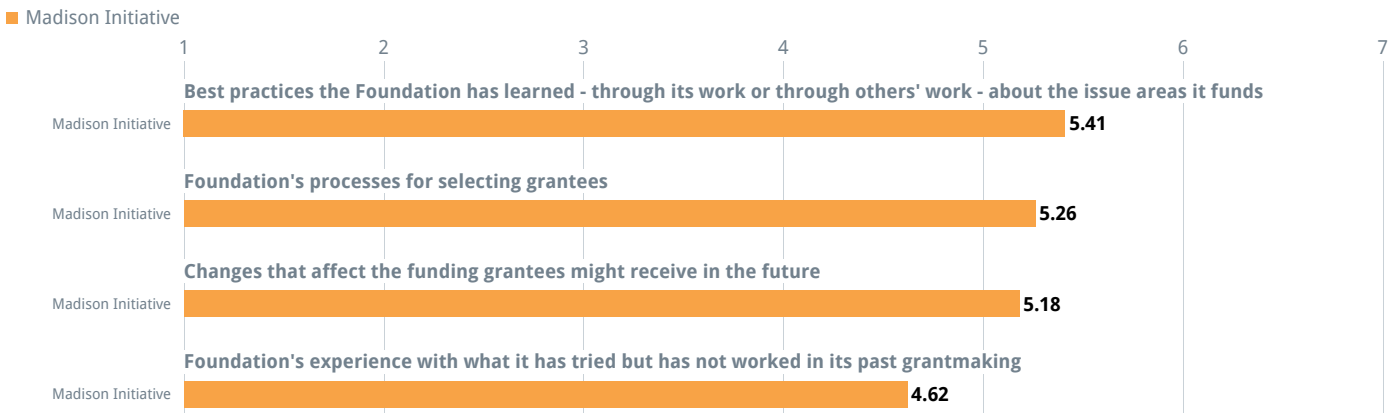
Subgroup:

Grantees were asked to rate how transparent Hewlett is in the following areas, where 1 = "Not at all transparent" and 7 = "Extremely transparent."

### Foundation Transparency - Overall



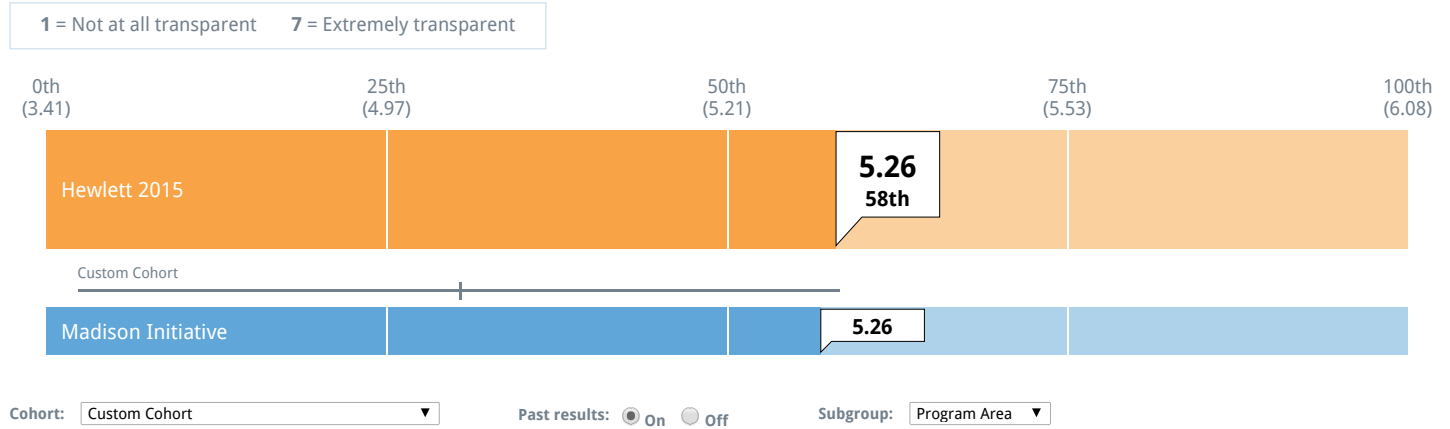
### Foundation Transparency - By Subgroup



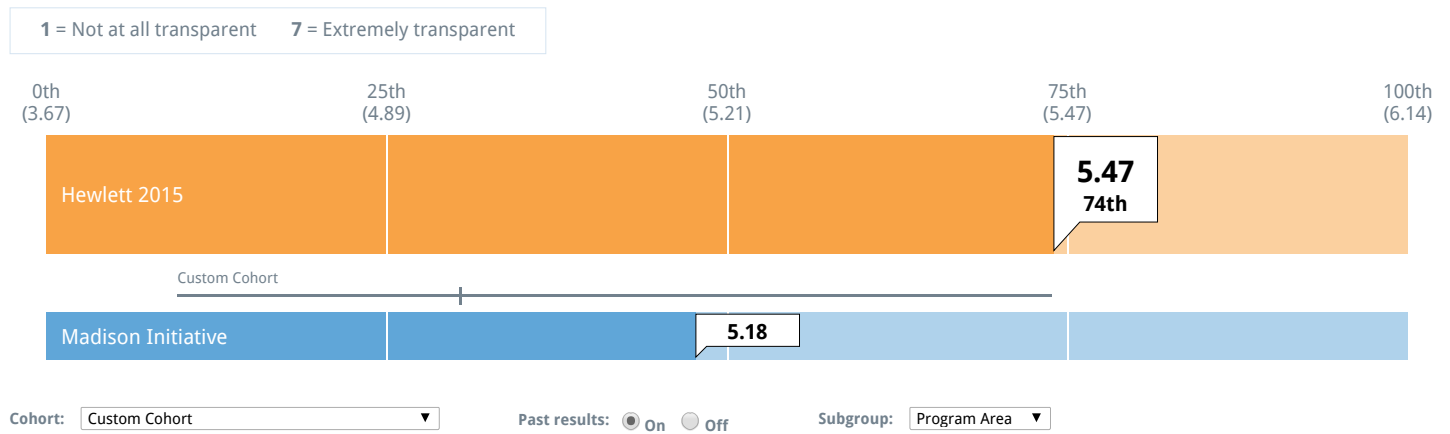
# Aspects of Funder Transparency

The charts below show grantee ratings of Hewlett's transparency in specific areas of its work.

## The Foundation's processes for selecting grantees

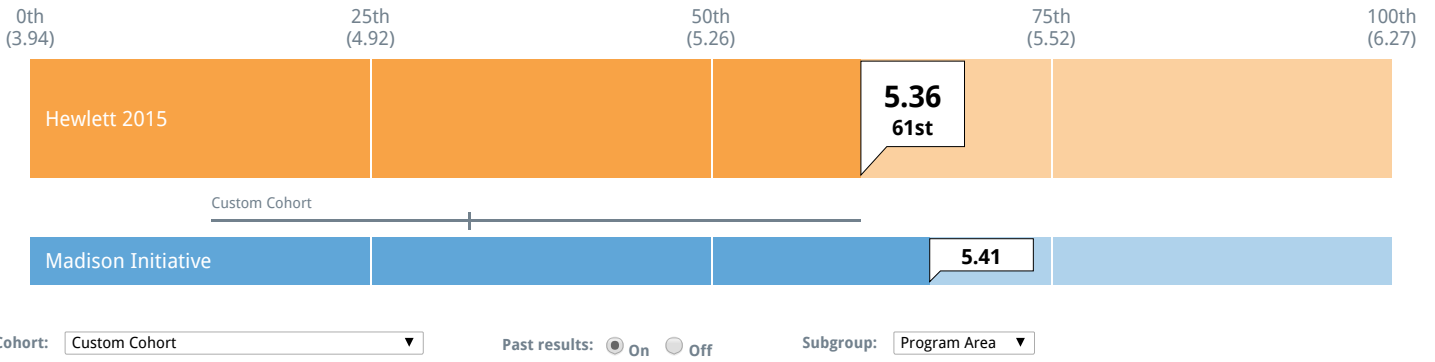


## Any changes that affect the funding your organization might receive in the future



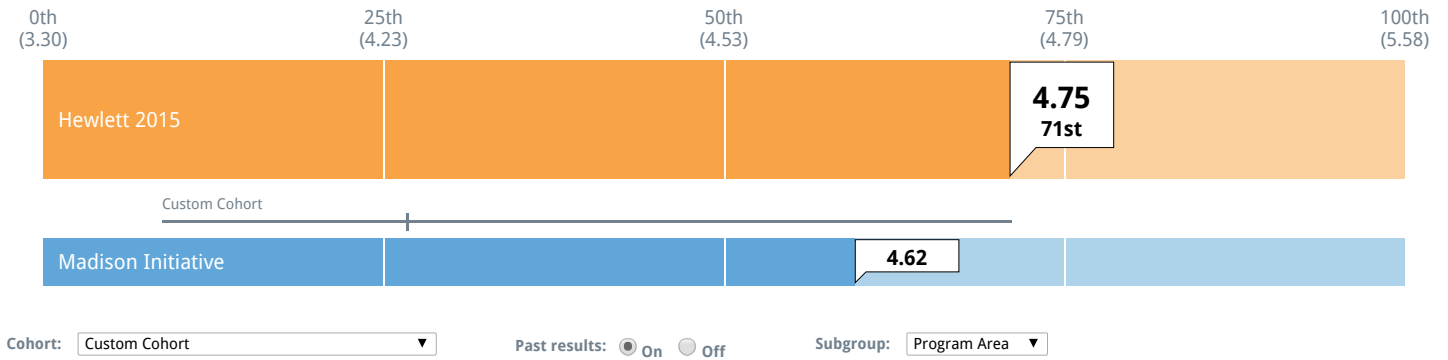
## Best practices the Foundation has learned - through its work or through others' work - about the issue areas it funds

1 = Not at all transparent 7 = Extremely transparent



## The Foundation's experiences with what it has tried but has not worked in its past grantmaking

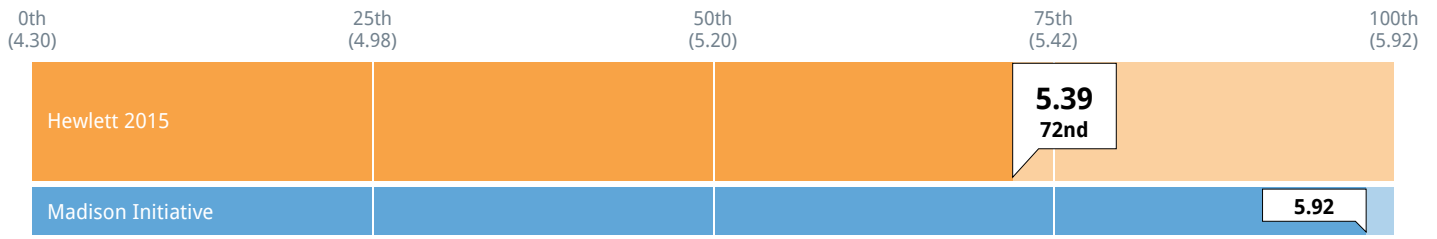
1 = Not at all transparent 7 = Extremely transparent



# Openness to Ideas from Grantees

"To what extent is the Foundation open to ideas from grantees about its strategy?"

1 = Not at all    7 = To a great extent



Cohort: None ▼

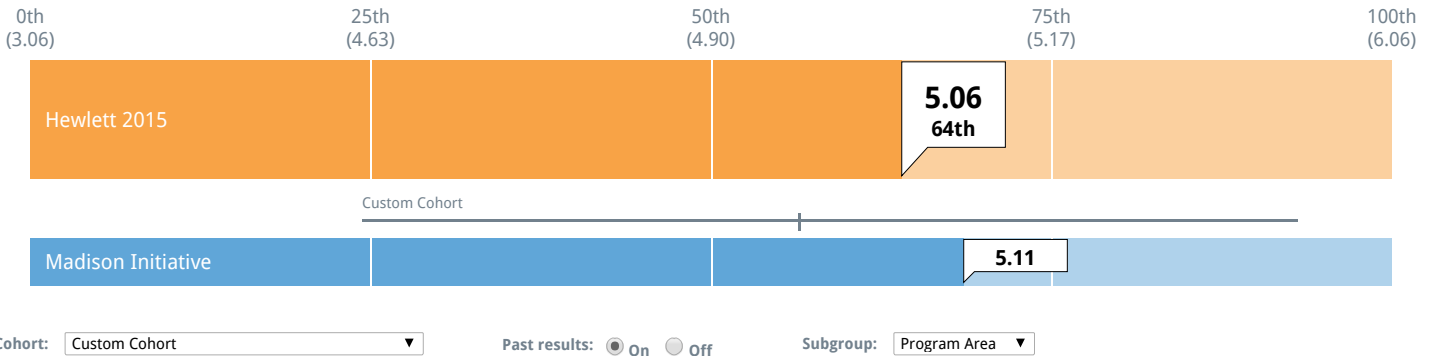
Past results:  On  Off

Subgroup: Program Area ▼

## GRANT PROCESSES

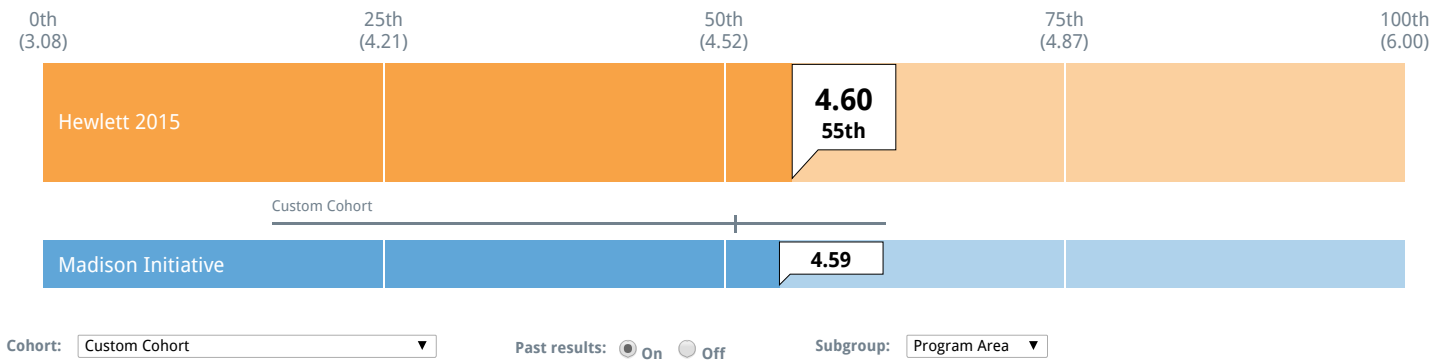
"How helpful was participating in the Foundation's selection process in strengthening the organization/ program funded by the grant?"

1 = Not at all helpful 7 = Extremely helpful



"How helpful was participating in the Foundation's reporting/evaluation process in strengthening the organization/program funded by the grant?"

1 = Not at all helpful 7 = Extremely helpful



## Selection Process

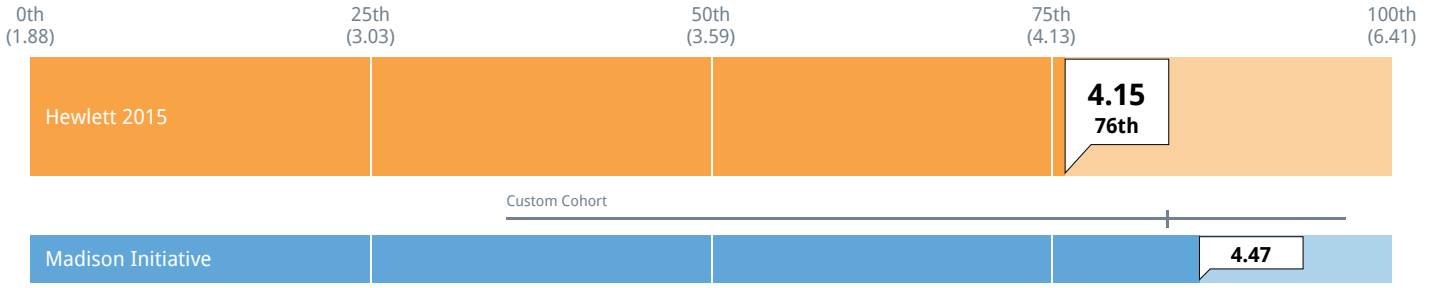
Did you submit a proposal for this grant? (Overall)	Hewlett 2015	Average Funder	Custom Cohort
Submitted a Proposal	98%	93%	96%
Did Not Submit a Proposal	2%	7%	4%

Did you submit a proposal for this grant? (By Subgroup)	Madison Initiative
Submitted a Proposal	100%
Did Not Submit a Proposal	0%



**“How involved was the Foundation staff in the development of your proposal?”**

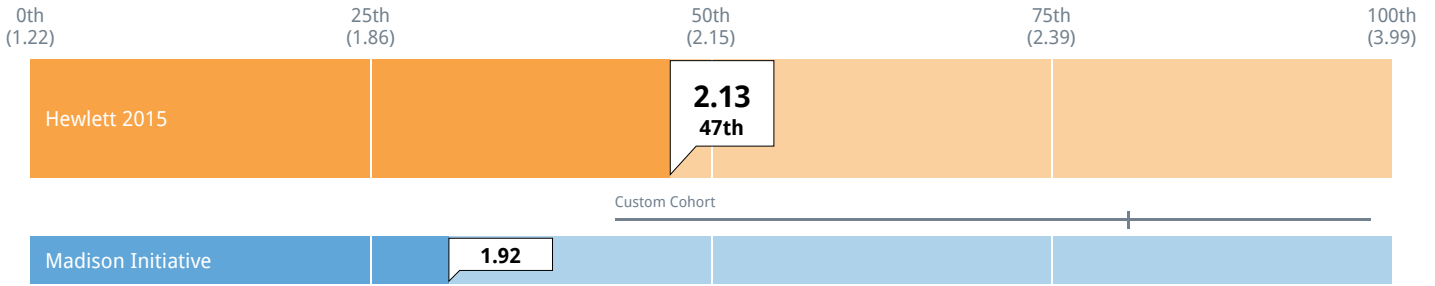
1 = No involvement    7 = Substantial involvement



Cohort:  Past results:  On  Off Subgroup:

**“As you developed your grant proposal, how much pressure did you feel to modify your organization’s priorities in order to create a grant proposal that was likely to receive funding?”**

1 = No pressure    7 = Significant pressure



Cohort:  Past results:  On  Off Subgroup:

## Time Between Submission and Clear Commitment

### “HOW MUCH TIME ELAPSED FROM THE SUBMISSION OF THE GRANT PROPOSAL TO CLEAR COMMITMENT OF FUNDING?”

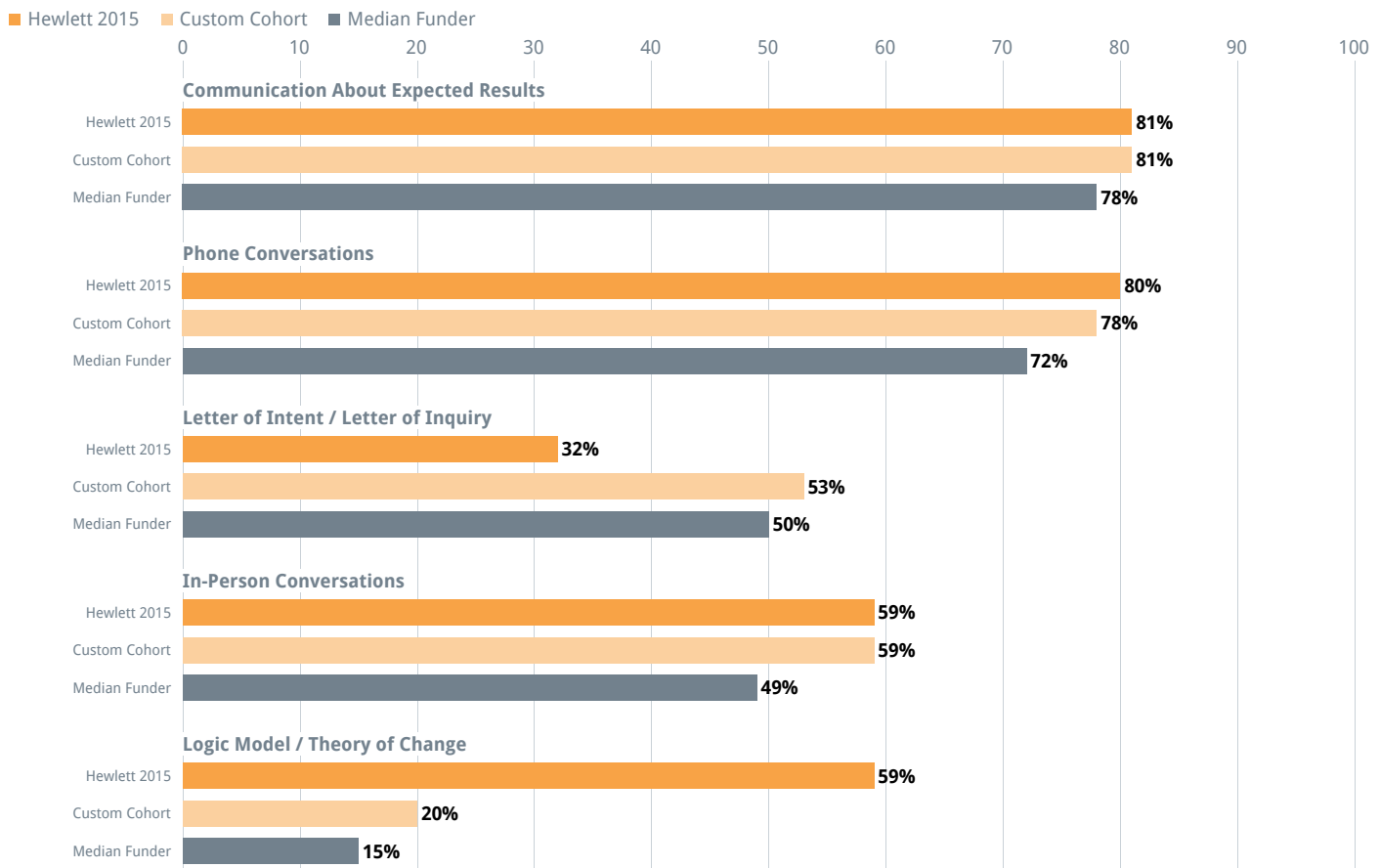
Time Elapsed from Submission of Proposal to Clear Commitment of Funding (Overall)	Hewlett 2015	Average Funder	Custom Cohort
Less than 1 month	6%	6%	5%
1 - 3 months	64%	55%	48%
4 - 6 months	24%	30%	32%
7 - 9 months	3%	5%	8%
10 - 12 months	1%	2%	4%
More than 12 months	1%	2%	3%

Time Elapsed from Submission of Proposal to Clear Commitment of Funding (By Subgroup)	Madison Initiative
Less than 1 month	16%
1 - 3 months	62%
4 - 6 months	16%
7 - 9 months	5%
10 - 12 months	0%
More than 12 months	0%

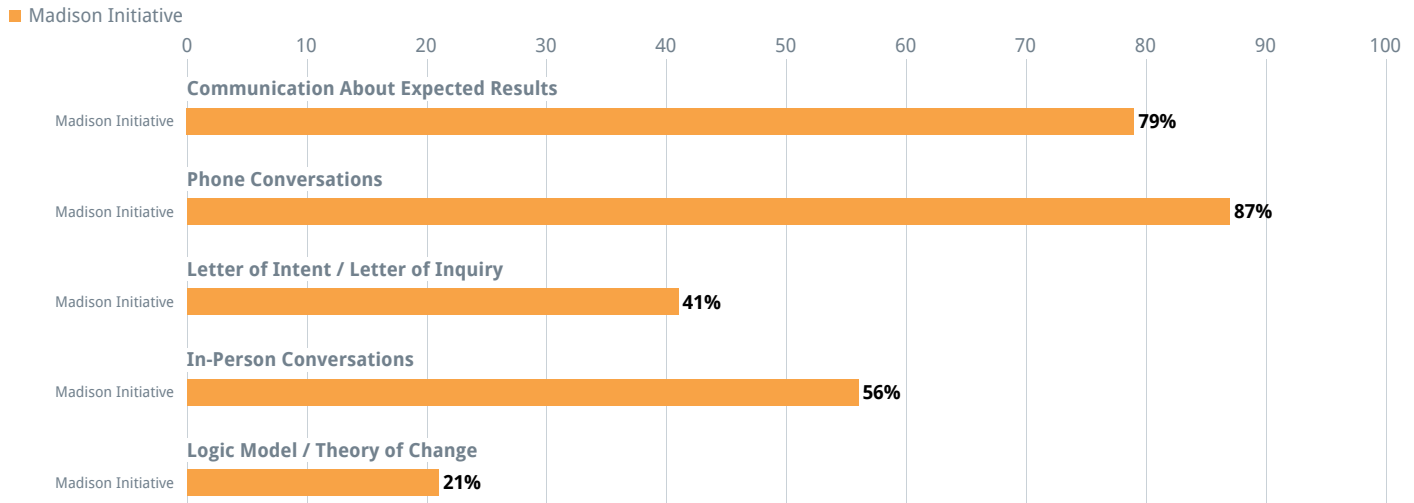
## Selection Process Activities

# "WHICH SELECTION/PROPOSAL PROCESS ACTIVITIES WERE A PART OF YOUR PROCESS?"

### Selection Process Activities



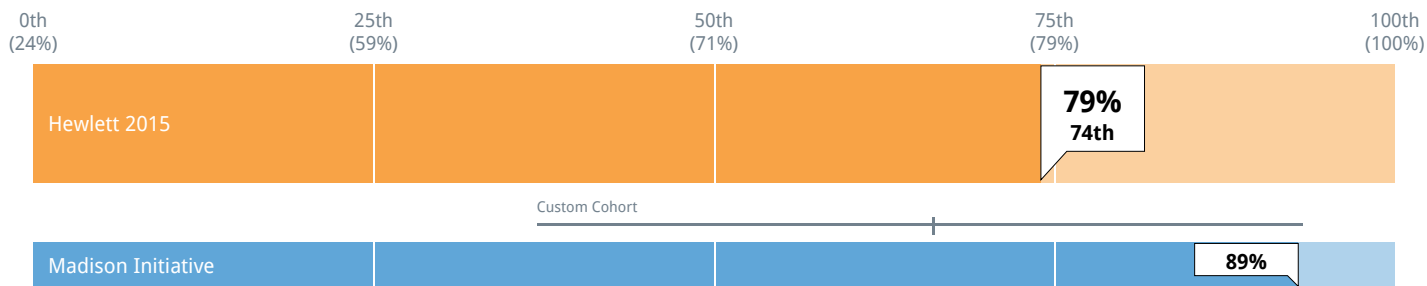
## Selection Process Activities - By Subgroup



## Reporting and Evaluation Process

**“At any point during the application or the grant period, did the Foundation and your organization exchange ideas regarding how your organization would assess the results of the work funded by this grant?”**

Proportion responding 'Yes'



Cohort:

Past results:  On  Off

Subgroup:

Participation in Reporting and/or Evaluation Processes (Overall)	Hewlett 2015	Average Funder	Custom Cohort
Participated in a reporting and/or evaluation process	62%	57%	61%
There will be a report/evaluation but it has not occurred yet	34%	34%	35%
There was/will be no report/evaluation	2%	5%	3%
Don't know	2%	4%	2%

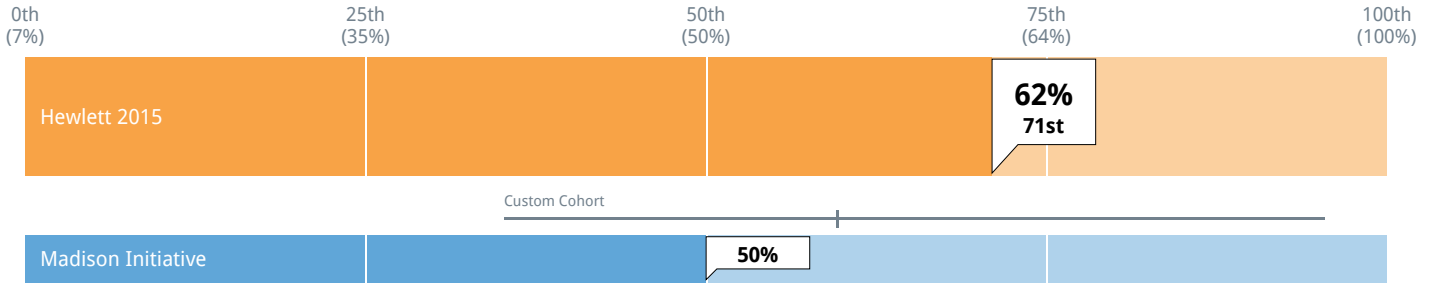
Participation in Reporting and/or Evaluation Processes (By Subgroup)	Madison Initiative
Participated in a reporting and/or evaluation process	46%
There will be a report/evaluation but it has not occurred yet	51%
There was/will be no report/evaluation	0%
Don't know	3%

Involved External Evaluator in Reporting/Evaluation Process (Overall)	Hewlett 2015	Average Funder	Custom Cohort
Yes	13%	20%	29%
No	87%	80%	71%

Involved External Evaluator in Reporting/Evaluation Process (By Subgroup)	Madison Initiative
Yes	0%
No	100%

**"After submission of your report/evaluation, did the Foundation or the evaluator discuss it with you?"**

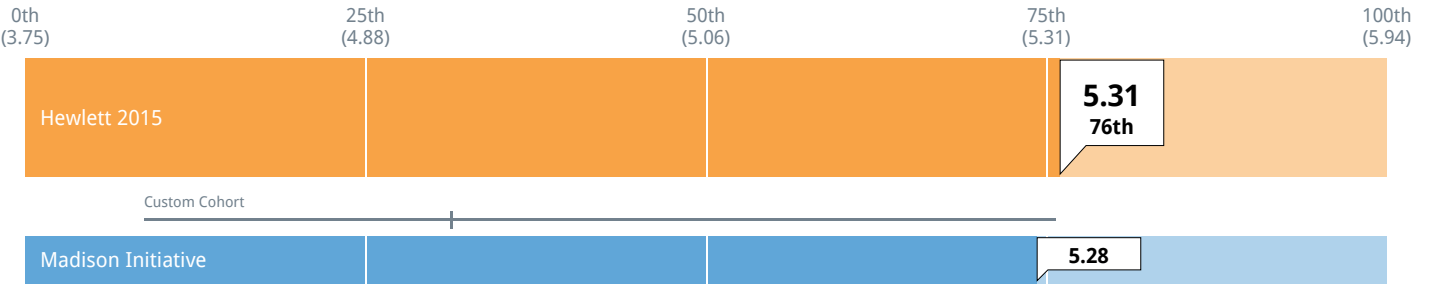
Proportion responding 'Yes'



Cohort:  Past results:  On  Off Subgroup:

**"How helpful has the Foundation been to your organization's ability to assess progress towards your organization's goals?"**

1 = Not at all helpful 7 = Extremely helpful

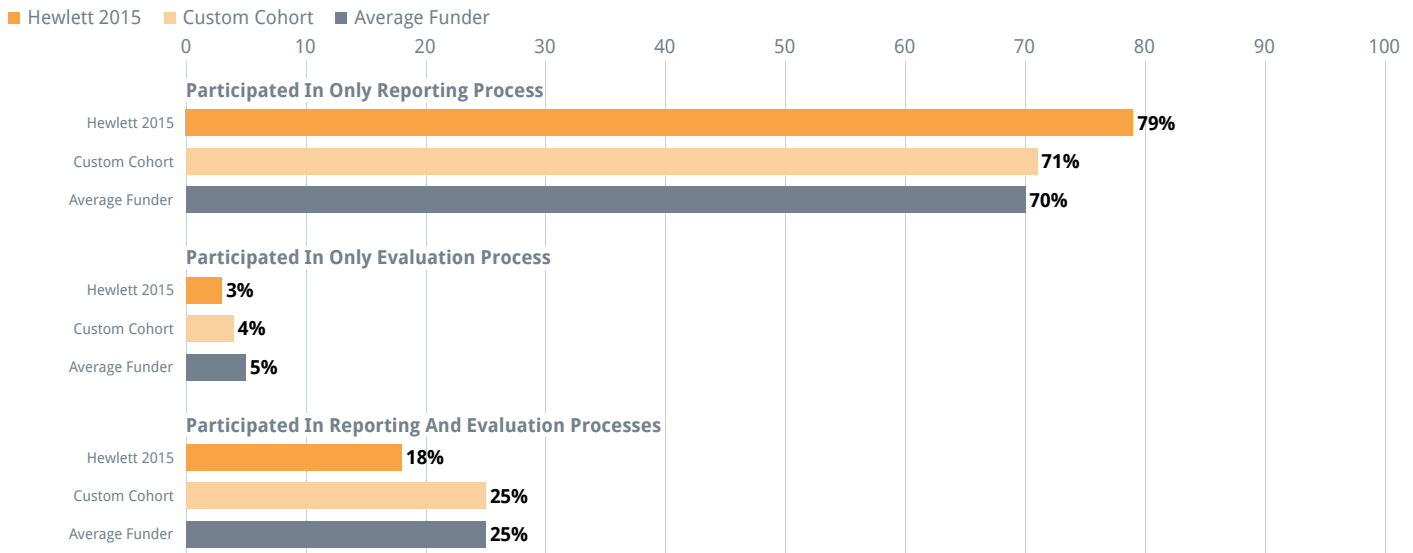


Cohort:  Past results:  On  Off Subgroup:

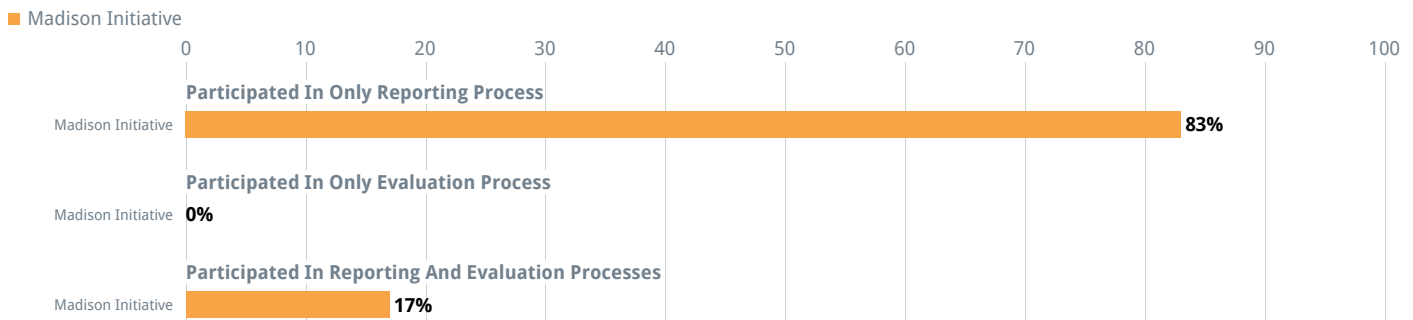
## Reporting and Evaluation Process Activities

### "WHICH REPORTING/EVALUATION PROCESS ACTIVITIES WERE A PART OF YOUR PROCESS?"

#### Reporting and Evaluation Process Activities



#### Reporting and Evaluation Process Activities - Madison Initiative





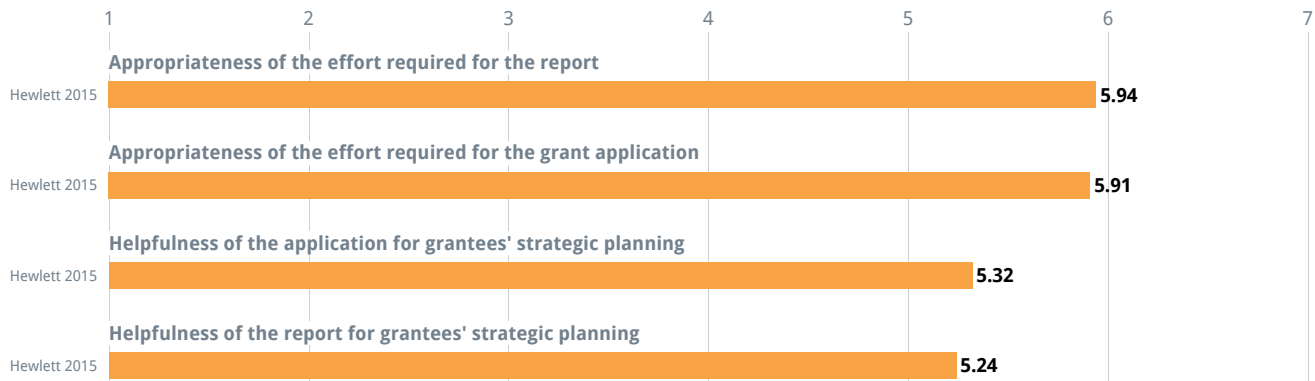
## Additional Questions Related to Grant Processes

"Please rate the level of agreement with each of the following statements regarding your experience with Hewlett's application and reporting requirements."

(1 = Strongly disagree, 4 = Neither agree nor disagree, 7 = Strongly agree)

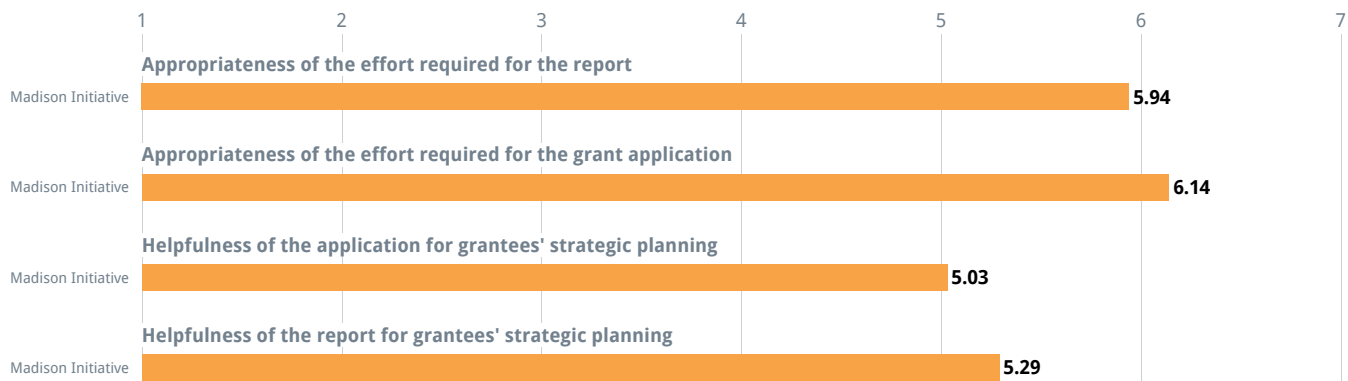
### Experience with Hewlett's Application and Reporting Requirements - Overall

■ Hewlett 2015



### Experience with Hewlett's Application and Reporting Requirements - Madison Initiative

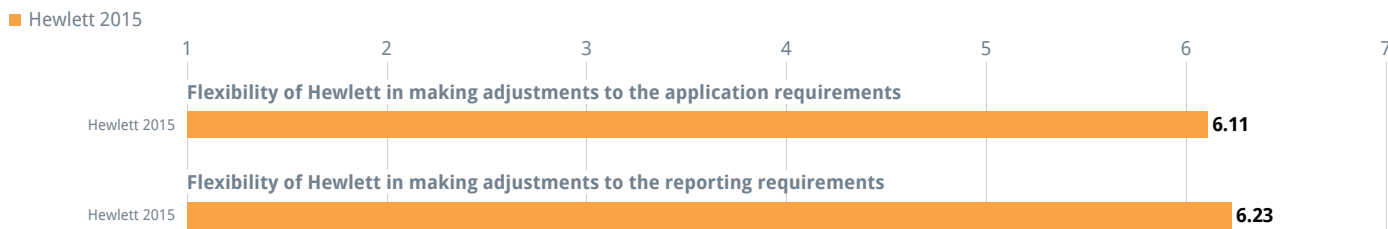
■ Madison Initiative



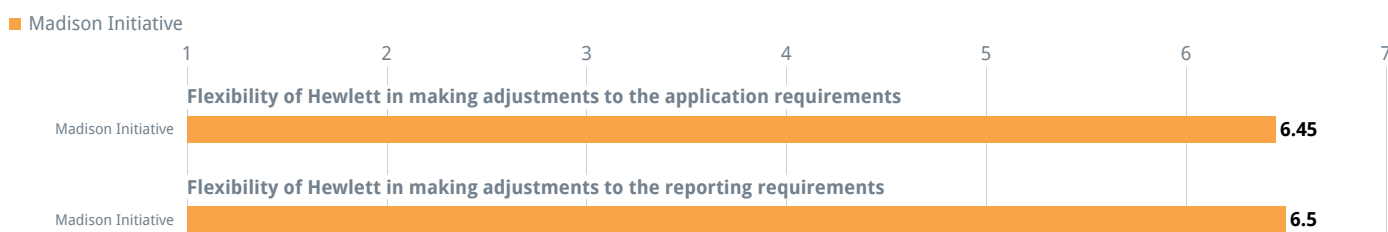
## "If you had to ask for a change in application/reporting requirements or content, how flexible was Hewlett with making adjustments to fit your circumstances?"

(1 = Not at all flexible, 7 = Extremely flexible)

### Hewlett's Flexibility with Needed Adjustments to Fit Circumstances - Overall



### Hewlett's Flexibility with Needed Adjustments to Fit Circumstances - Madison Initiative

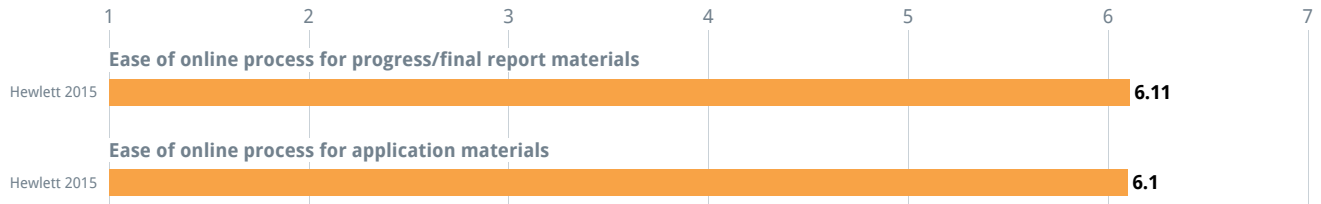


**"If you submitted your application/progress or final report to Hewlett through the Web, how easy was the online process to use?"**

(1 = Very difficult to use, 7 = Extremely easy to use)

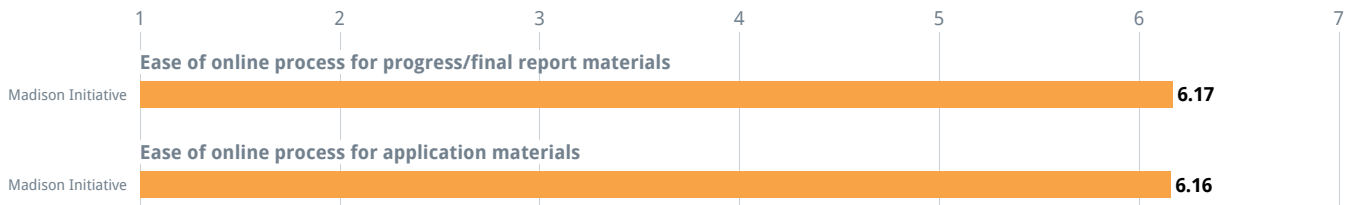
**Online Process Ease of Use - Overall**

■ Hewlett 2015



**Online Process Ease of Use - Madison Initiative**

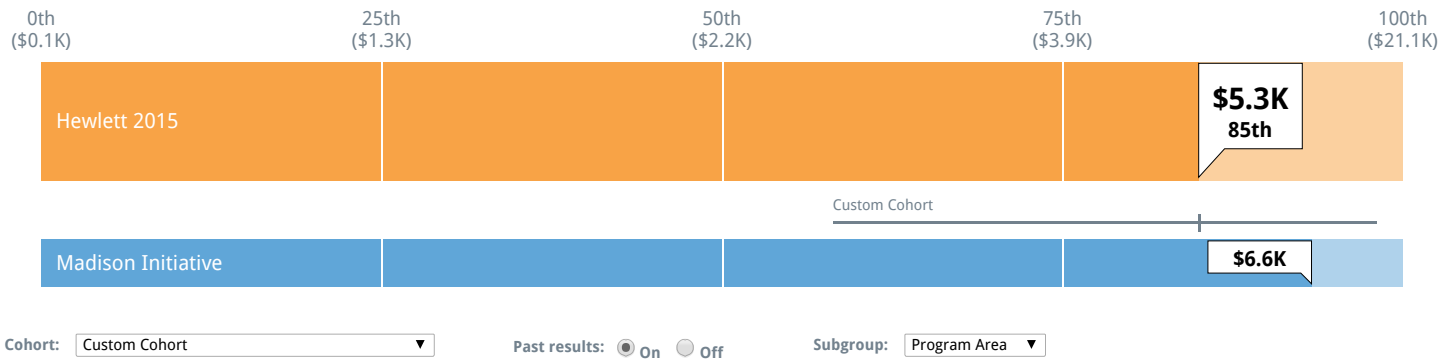
■ Madison Initiative



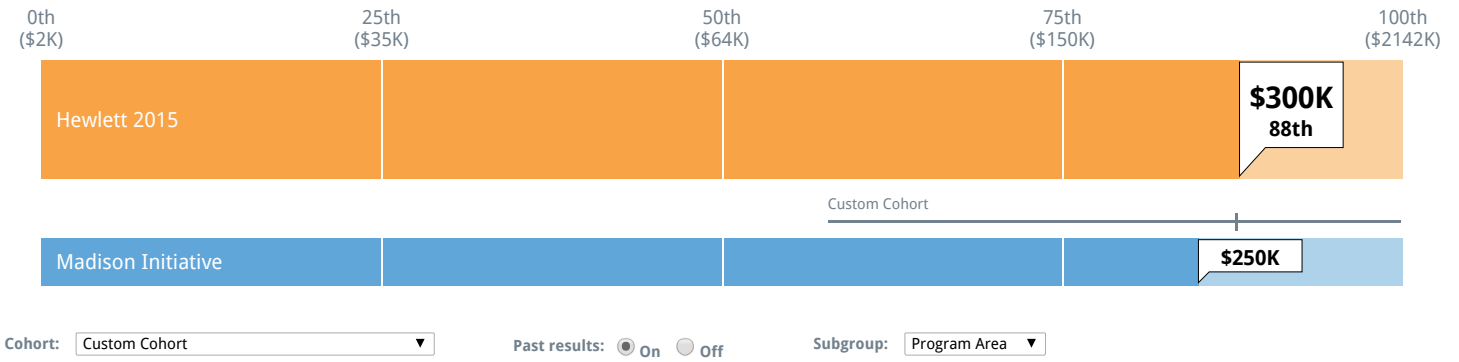
# DOLLAR RETURN AND TIME SPENT ON PROCESSES

## Dollar Return: Median grant dollars awarded per process hour required

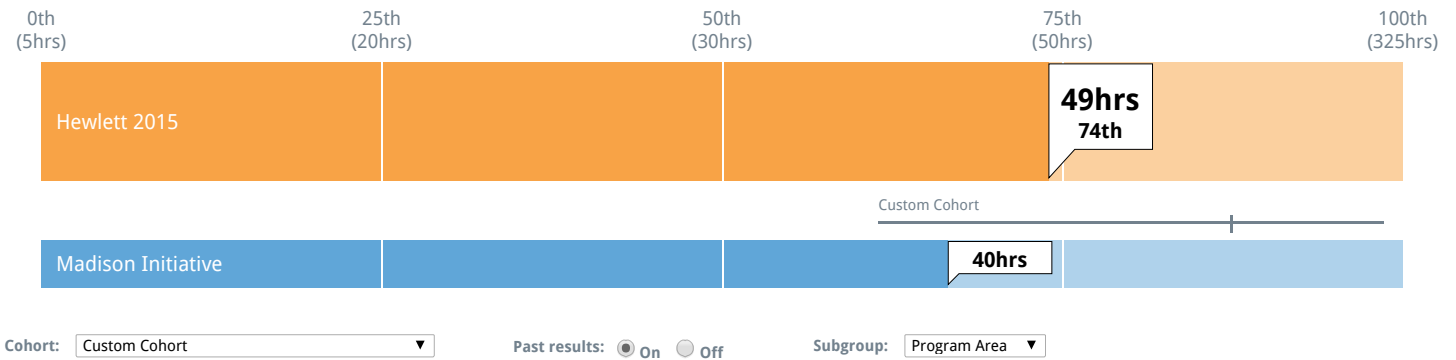
Includes total grant dollars awarded and total time necessary to fulfill the requirements over the lifetime of the grant



## Median Grant Size

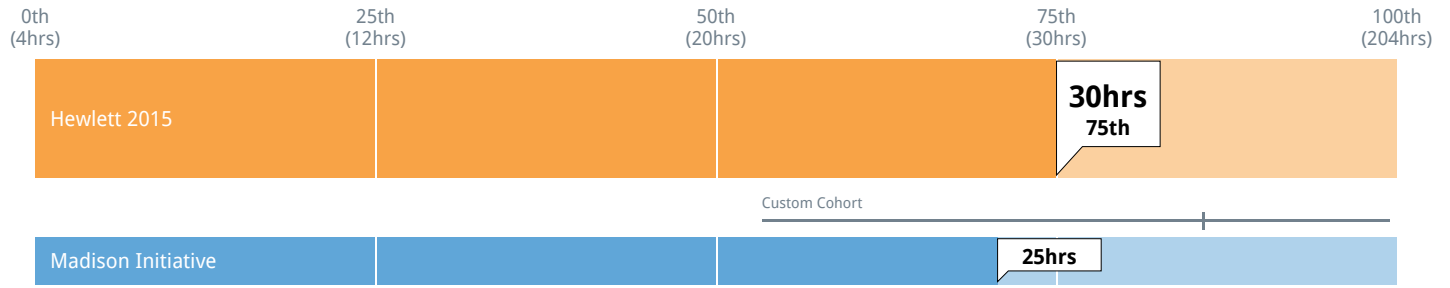


## Median hours spent by grantees on funder requirements over grant lifetime



# Time Spent on Selection Process

## Median Hours Spent on Proposal and Selection Process



Cohort:  Past results:  On  Off Subgroup:

### Time Spent On Proposal And Selection Process (Overall)

	Hewlett 2015	Average Funder	Custom Cohort
1 to 9 hours	9%	23%	7%
10 to 19 hours	19%	22%	11%
20 to 29 hours	18%	17%	15%
30 to 39 hours	10%	8%	8%
40 to 49 hours	18%	11%	17%
50 to 99 hours	15%	10%	18%
100 to 199 hours	8%	6%	15%
200+ hours	4%	3%	9%

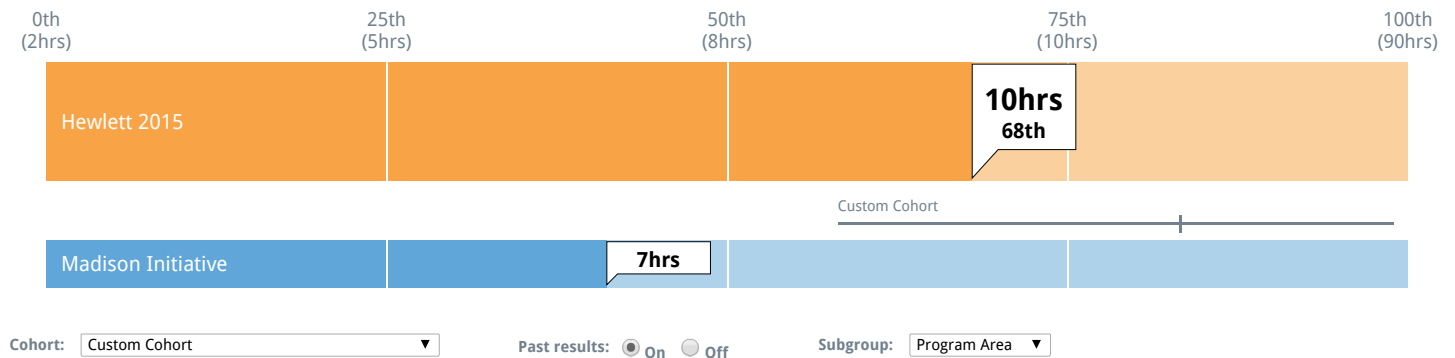
### Time Spent On Proposal And Selection Process (By Subgroup)

#### Madison Initiative

1 to 9 hours	11%
10 to 19 hours	26%
20 to 29 hours	14%
30 to 39 hours	11%
40 to 49 hours	17%
50 to 99 hours	9%
100 to 199 hours	11%
200+ hours	0%

# Time Spent on Reporting and Evaluation Process

## Median Hours Spent on Monitoring, Reporting and Evaluation Process Per Year



Time Spent On Monitoring, Reporting, And Evaluation Process (Annualized) (Overall)	Hewlett 2015	Average Funder	Custom Cohort
1 to 9 hours	46%	55%	36%
10 to 19 hours	21%	19%	23%
20 to 29 hours	14%	10%	15%
30 to 39 hours	4%	4%	5%
40 to 49 hours	6%	3%	6%
50 to 99 hours	5%	5%	8%
100+ hours	4%	4%	7%

Time Spent On Monitoring, Reporting, And Evaluation Process (Annualized) (By Subgroup)	Madison Initiative
1 to 9 hours	63%
10 to 19 hours	15%
20 to 29 hours	4%
30 to 39 hours	0%
40 to 49 hours	7%
50 to 99 hours	7%
100+ hours	4%

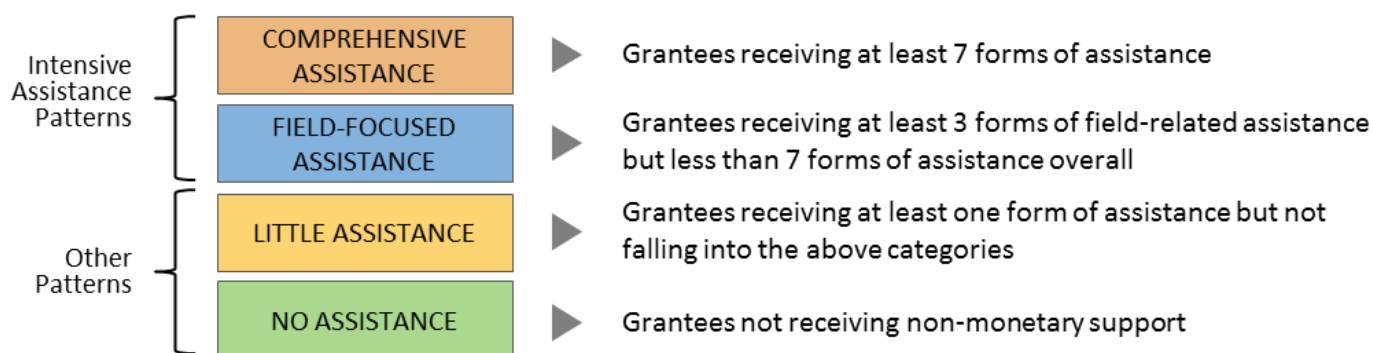
# NON-MONETARY ASSISTANCE

## Non-Monetary Assistance Patterns

Grantees were asked to indicate whether they had received any of the following fourteen types of assistance provided directly or paid for by the Foundation.

Management Assistance	Field-Related Assistance	Other Assistance
General management advice	Encouraged/facilitated collaboration	Board development/governance assistance
Strategic planning advice	Insight and advice on your field	Information technology assistance
Financial planning/accounting	Introductions to leaders in field	Communications/marketing/publicity assistance
Development of performance measures	Provided research or best practices	Use of Foundation facilities
	Provided seminars/forums/convenings	Staff/management training

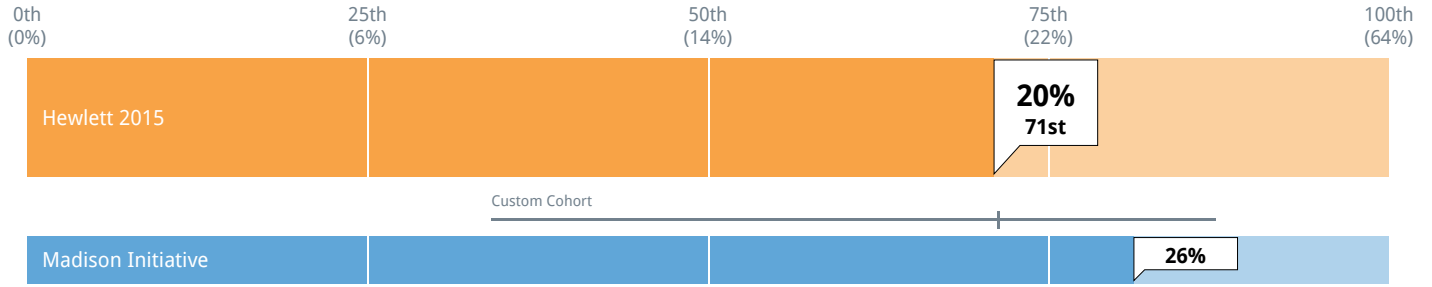
Based on their responses, CEP categorized grantees by the pattern of assistance they received. CEP's analysis shows that providing three or fewer assistance activities is often ineffective; it is only when grantees receive one of the two intensive patterns of assistance described below that they have a substantially more positive experience compared to grantees receiving no assistance.



Non-Monetary Assistance Patterns (Overall)	Hewlett 2015	Average Funder	Custom Cohort
Comprehensive	5%	6%	6%
Field-focused	15%	9%	15%
Little	44%	37%	41%
None	36%	47%	38%

Non-Monetary Assistance Patterns (By Subgroup)	Madison Initiative
Comprehensive	3%
Field-focused	23%
Little	33%
None	41%

## Proportion of grantees that received field-focused or comprehensive assistance



Cohort:

Past results:  On  Off

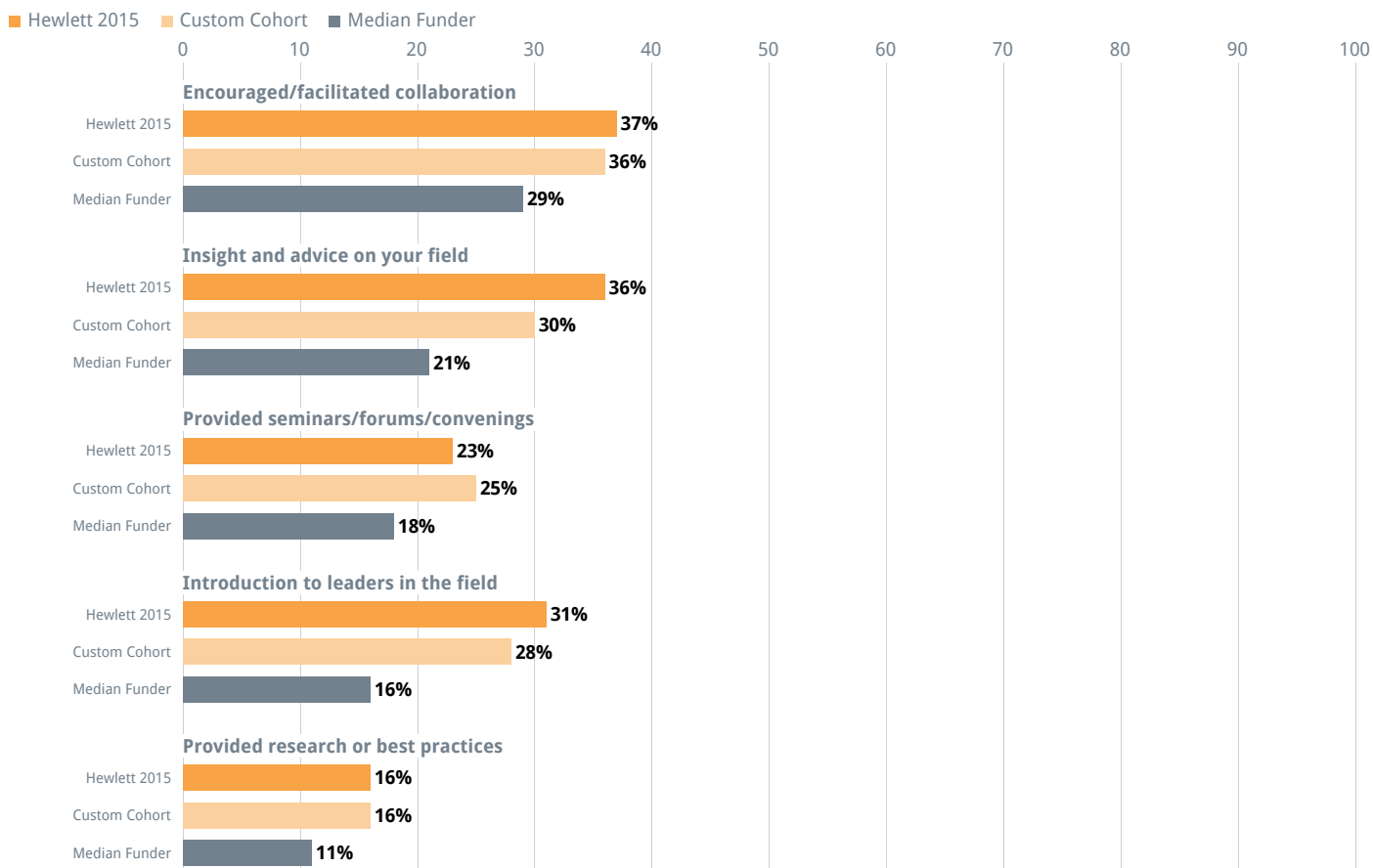
Subgroup:



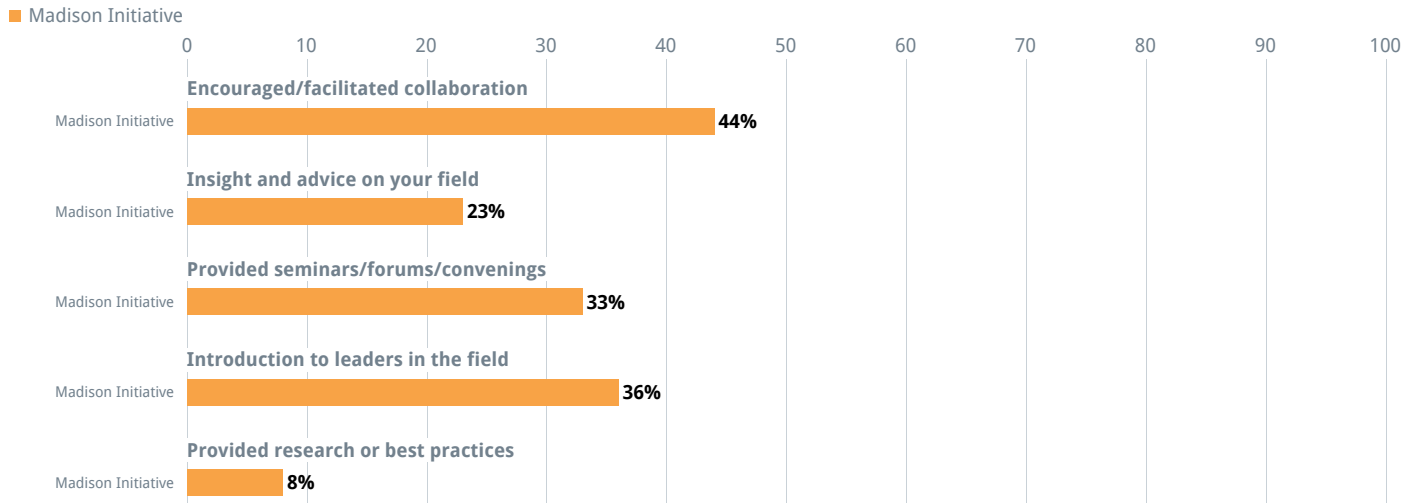
## Field-Related Assistance Activities

"PLEASE INDICATE ALL TYPES OF NON-MONETARY ASSISTANCE, IF ANY, YOU RECEIVED (FROM STAFF OR A THIRD PARTY PAID FOR BY THE FOUNDATION) ASSOCIATED WITH THIS FUNDING."

### Percentage of Grantees that Received Field-Related Assistance



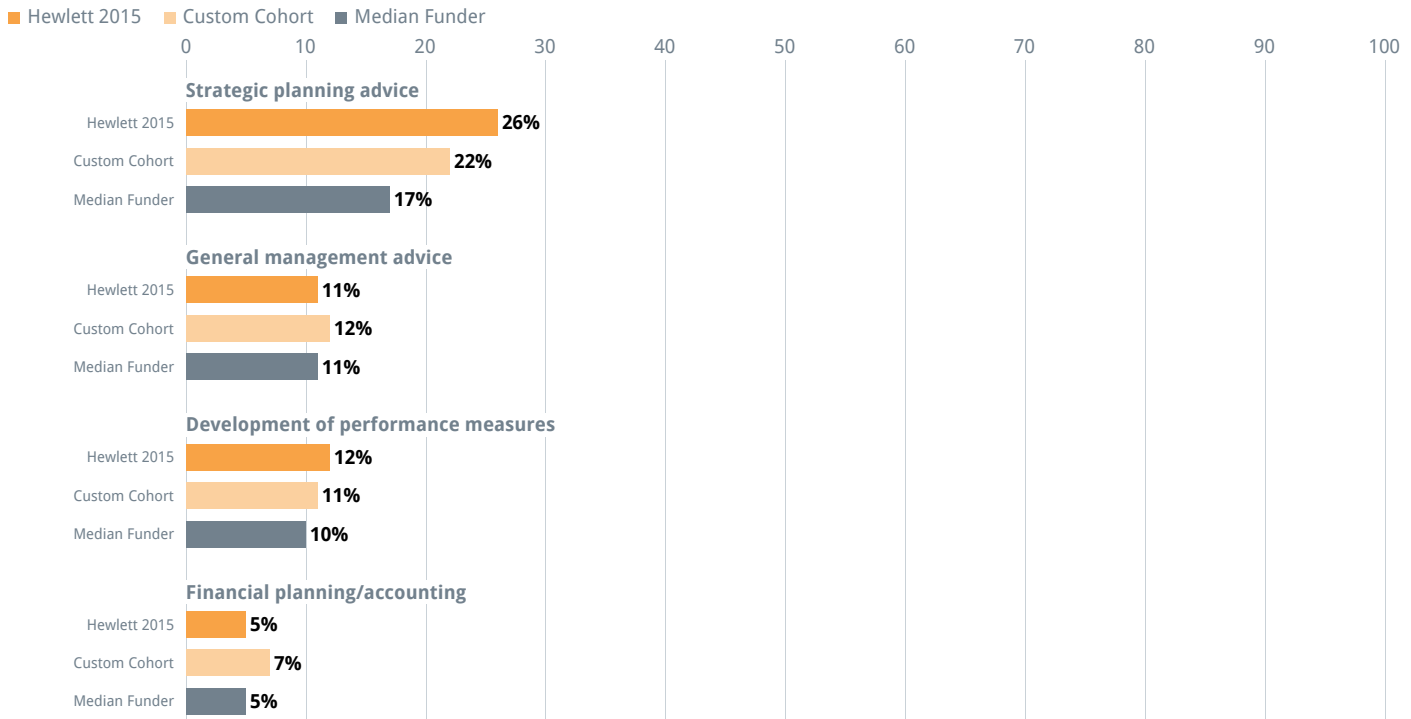
## Percentage of Grantees that Received Field-Related Assistance - Madison Initiative



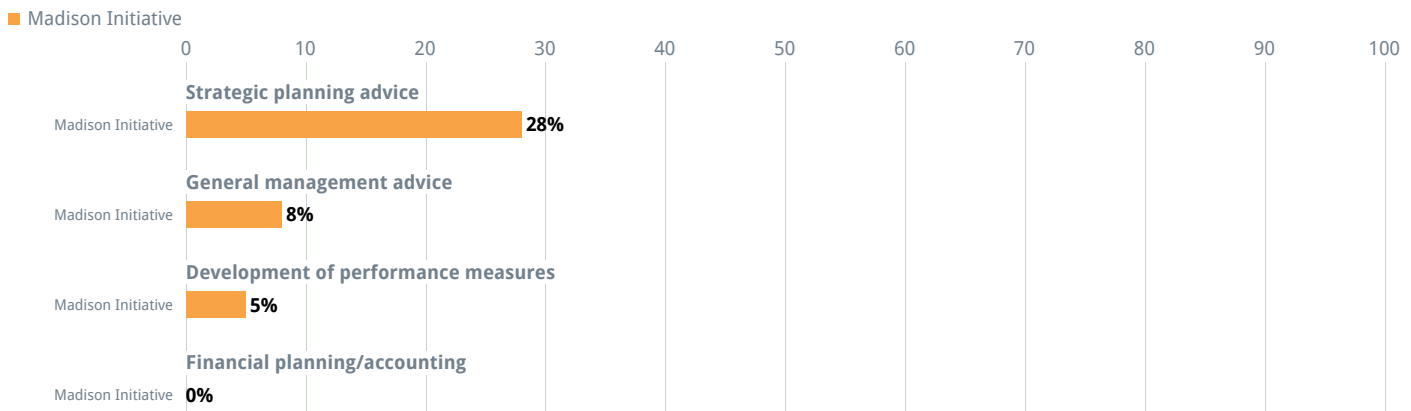
## Management Assistance Activities

"PLEASE INDICATE ALL TYPES OF NON-MONETARY ASSISTANCE, IF ANY, YOU RECEIVED (FROM STAFF OR A THIRD PARTY PAID FOR BY THE FOUNDATION) ASSOCIATED WITH THIS FUNDING."

### Percentage of Grantees that Received Management Assistance



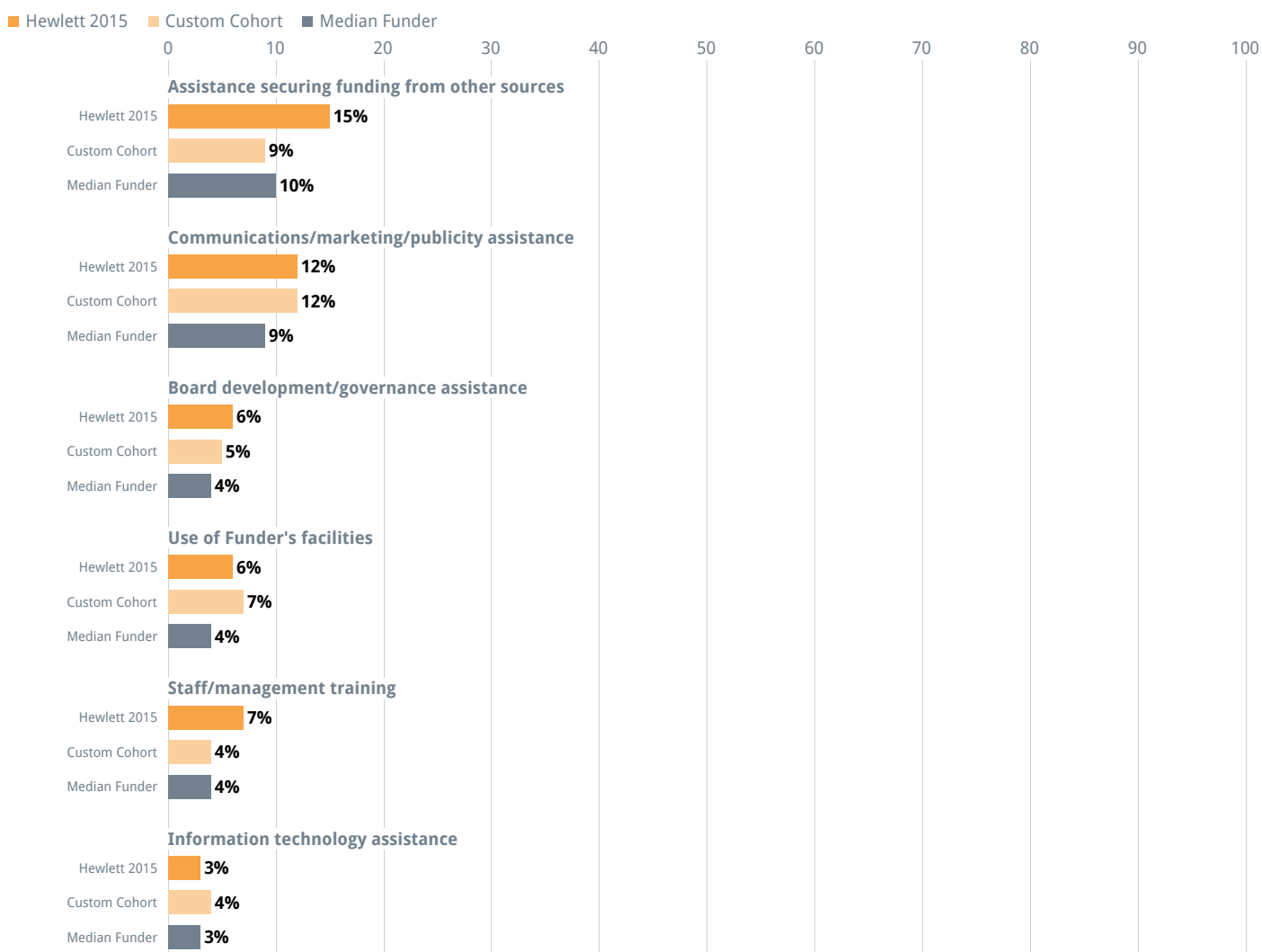
### Percentage of Grantees that Received Management Assistance - Madison Initiative



## Other Assistance Activities

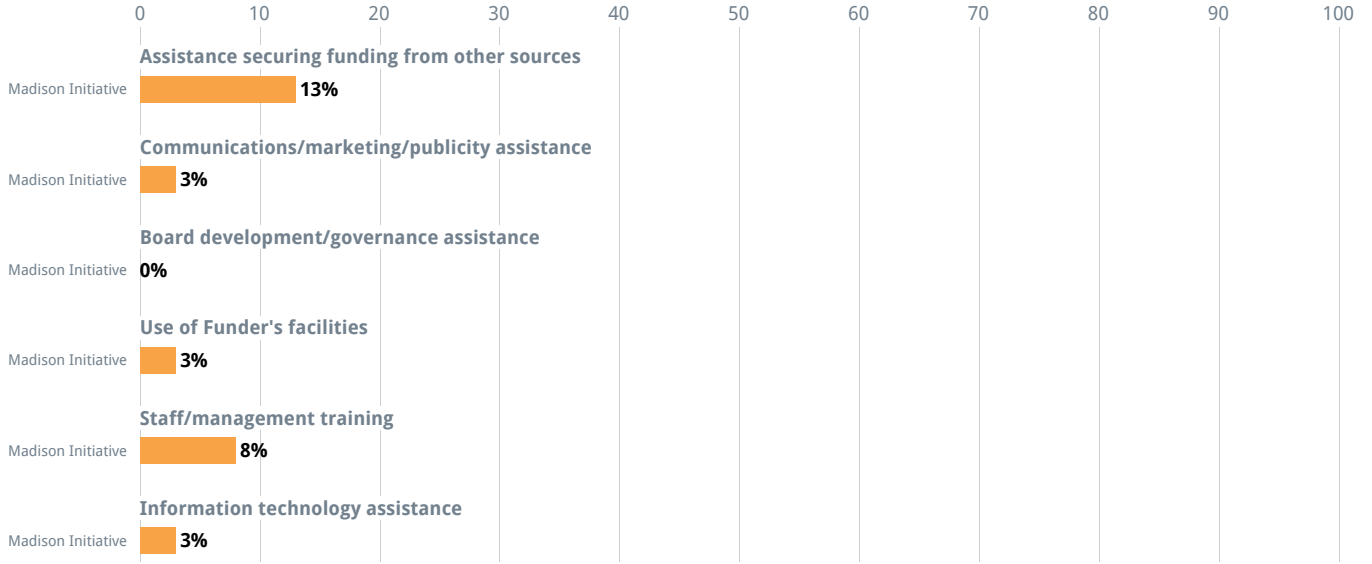
"PLEASE INDICATE ALL TYPES OF NON-MONETARY ASSISTANCE, IF ANY, YOU RECEIVED (FROM STAFF OR A THIRD PARTY PAID FOR BY THE FOUNDATION) ASSOCIATED WITH THIS FUNDING."

### Percentage of Grantees that Received Other Assistance



## Percentage of Grantees that Received Other Assistance - Madison Initiative

■ Madison Initiative



## CONTEXTUAL DATA

### GRANTMAKING CHARACTERISTICS

Length of Grant Awarded (Overall)	Hewlett 2015	Median Funder	Custom Cohort
Average grant length	2.5 years	2.1 years	2.5 years

Length of Grant Awarded (Overall)	Hewlett 2015	Average Funder	Custom Cohort
1 year	24%	49%	23%
2 years	33%	22%	34%
3 years	36%	17%	27%
4 years	2%	4%	6%
5 or more years	5%	8%	10%

Type of Grant Awarded (Overall)	Hewlett 2015	Average Funder	Custom Cohort
Program / Project Support	51%	64%	75%
General Operating / Core Support	44%	20%	14%
Capital Support: Building / Renovation / Endowment Support / Other	0%	7%	2%
Technical Assistance / Capacity Building	2%	4%	4%
Scholarship / Fellowship	2%	2%	3%
Event / Sponsorship Funding	1%	2%	1%

## GRANTMAKING CHARACTERISTICS - MADISON INITIATIVE

Length of Grant Awarded (By Subgroup)	Madison Initiative
Average grant length	2.1 years

Length of Grant Awarded (By Subgroup)	Madison Initiative
1 year	34%
2 years	37%
3 years	26%
4 years	0%
5 or more years	3%

Type of Grant Awarded (By Subgroup)	Madison Initiative
Program / Project Support	59%
General Operating / Core Support	31%
Capital Support: Building / Renovation / Endowment Support / Other	0%
Technical Assistance / Capacity Building	0%
Scholarship / Fellowship	8%
Event / Sponsorship Funding	3%

# GRANT SIZE

Grant Amount Awarded (Overall)	Hewlett 2015	Median Funder	Custom Cohort
Median grant size	\$300K	\$64K	\$300K

Grant Amount Awarded (Overall)	Hewlett 2015	Average Funder	Custom Cohort
Less than \$10K	1%	11%	1%
\$10K - \$24K	1%	15%	3%
\$25K - \$49K	4%	14%	5%
\$50K - \$99K	11%	16%	9%
\$100K - \$149K	10%	9%	8%
\$150K - \$299K	22%	15%	19%
\$300K - \$499K	17%	7%	16%
\$500K - \$999K	16%	6%	15%
\$1MM and above	17%	7%	25%

Median Percent of Budget Funded by Grant (Annualized) (Overall)	Hewlett 2015	Median Funder	Custom Cohort
Size of grant relative to size of grantee budget	5%	4%	5%



## GRANT SIZE - MADISON INITIATIVE

Grant Amount Awarded (By Subgroup) Madison Initiative

Median grant size	\$250K
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Grant Amount Awarded (By Subgroup) Madison Initiative

Less than \$10K	0%
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\$10K - \$24K	0%
---------------	----

\$25K - \$49K	3%
---------------	----

\$50K - \$99K	13%
---------------	-----

\$100K - \$149K	18%
-----------------	-----

\$150K - \$299K	18%
-----------------	-----

\$300K - \$499K	24%
-----------------	-----

\$500K - \$999K	13%
-----------------	-----

\$1MM and above	11%
-----------------	-----

Median Percent of Budget Funded by Grant (Annualized) (By Subgroup) Madison Initiative

Size of grant relative to size of grantee budget	4%
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## Grantee Characteristics

Operating Budget of Grantee Organization (Overall)	Hewlett 2015	Median Funder	Custom Cohort
Median Budget	\$2.7M	\$1.4M	\$3.0M

Operating Budget of Grantee Organization (Overall)	Hewlett 2015	Average Funder	Custom Cohort
<\$100K	1%	9%	3%
\$100K - \$499K	13%	20%	12%
\$500K - \$999K	9%	14%	10%
\$1MM - \$4.9MM	38%	29%	29%
\$5MM - \$24MM	23%	17%	24%
>=\$25MM	16%	11%	21%

## GRANTEE CHARACTERISTICS - MADISON INITIATIVE

Operating Budget of Grantee Organization (By Subgroup)	Madison Initiative
Median Budget	\$2.4M

Operating Budget of Grantee Organization (By Subgroup)	Madison Initiative
<\$100K	3%
\$100K - \$499K	0%
\$500K - \$999K	17%
\$1MM - \$4.9MM	40%
\$5MM - \$24MM	17%
>=\$25MM	23%

## FUNDING RELATIONSHIP

Pattern of Grantees' Funding Relationship with the Foundation (Overall)	Hewlett 2015	Average Funder	Custom Cohort
First grant received from the Foundation	20%	29%	34%
Consistent funding in the past	67%	52%	44%
Inconsistent funding in the past	13%	18%	22%

Funding Status and Grantees Previously Declined Funding (Overall)	Hewlett 2015	Median Funder	Custom Cohort
Percent of grantees currently receiving funding from the Foundation	84%	78%	84%
Percent of grantees previously declined funding by the Foundation	14%	27%	22%

## FUNDING RELATIONSHIP - MADISON INITIATIVE

Pattern of Grantees' Funding Relationship with the Foundation (By Subgroup)	Madison Initiative
First grant received from the Foundation	66%
Consistent funding in the past	11%
Inconsistent funding in the past	23%

Funding Status and Grantees Previously Declined Funding (By Subgroup)	Madison Initiative
Percent of grantees currently receiving funding from the Foundation	87%
Percent of grantees previously declined funding by the Foundation	3%

## GRANTEE DEMOGRAPHICS

Job Title of Respondents (Overall)	Hewlett 2015	Average Funder	Custom Cohort
Executive Director	44%	47%	38%
Other Senior Management	22%	14%	20%
Project Director	14%	12%	22%
Development Director	7%	10%	7%
Other Development Staff	7%	7%	5%
Volunteer	0%	1%	0%
Other	6%	9%	9%

Gender of Respondents (Overall)	Hewlett 2015	Average Funder	Custom Cohort
Female	57%	63%	54%
Male	43%	37%	46%

Race/Ethnicity of Respondents (Overall)	Hewlett 2015	Average Funder	Custom Cohort
Multi-racial	4%	2%	3%
African-American/Black	5%	7%	7%
Asian (incl. Indian subcontinent)	8%	3%	6%
Hispanic/Latino	7%	5%	6%
American Indian/Alaskan Native	0%	1%	1%
Pacific Islander	0%	0%	0%
Caucasian/White	75%	80%	75%
Other	2%	1%	2%

## GRANTEE DEMOGRAPHICS - MADISON INITIATIVE

Job Title of Respondents (By Subgroup)	Madison Initiative
Executive Director	36%
Other Senior Management	23%
Project Director	26%
Development Director	8%
Other Development Staff	3%
Volunteer	0%
Other	5%

Gender of Respondents (By Subgroup)	Madison Initiative
Female	41%
Male	59%

Race/Ethnicity of Respondents (By Subgroup)	Madison Initiative
Multi-racial	3%
African-American/Black	0%
Asian (incl. Indian subcontinent)	0%
Hispanic/Latino	0%
American Indian/Alaskan Native	0%
Pacific Islander	0%
Caucasian/White	97%
Other	0%

## Funder Characteristics

Financial Information (Overall)	Hewlett 2015	Median Funder	Custom Cohort
Total assets	\$9.0B	\$199.2M	\$5.7B
Total giving	\$434.2M	\$13.5M	\$233.0M

Funder Staffing (Overall)	Hewlett 2015	Median Funder	Custom Cohort
Total staff (FTEs)	112	13	112
Percent of staff (FTEs) actively managing grantee relationships	42%	42%	39%
Percent of staff who are program staff	42%	41%	38%

Grantmaking Processes (Overall)	Hewlett 2015	Median Funder	Custom Cohort
Proportion of grants that are proactive	99%	42%	98%
Proportion of grantmaking dollars that are proactive	99%	50%	98%

## ABOUT CEP & CONTACT INFORMATION

### 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.

### ABOUT THE GPR

Since 2003, the Grantee Perception Report® (GPR) has provided funders with comparative, candid feedback based on grantee perceptions. The GPR is the only grantee survey process that provides comparative data, and is based on extensive research and analysis. Hundreds of funders of all types and sizes have commissioned the GPR, and tens of thousands of grantees have provided their perspectives to help funders improve their work. CEP has surveyed grantees in more than 150 countries and in 8 different languages.

The GPR's quantitative and qualitative data helps foundation leaders evaluate and understand their grantees' perceptions of their effectiveness, and how that compares to their philanthropic peers.

### CONTACT INFORMATION

Kevin Bolduc, Vice President - Assessment and Advisory Services  
(617) 492-0800 ext. 202  
[kevinb@effectivephilanthropy.org](mailto:kevinb@effectivephilanthropy.org)

Stephanie Moline Benoit, Analyst  
(415) 391-3070 ext. 161  
[stephanieb@effectivephilanthropy.org](mailto:stephanieb@effectivephilanthropy.org)



THE CENTER FOR  
EFFECTIVE PHILANTHROPY

675 Massachusetts Avenue  
7th Floor  
Cambridge, MA 02139  
Tel: (617) 492-0800  
Fax: (617) 492-0888

131 Steuart Street  
Suite 501  
San Francisco, CA 94105  
Tel: (415) 391-3070  
Fax: (415) 956-9916

[www.effectivephilanthropy.org](http://www.effectivephilanthropy.org)