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**Subject:** Key Findings from The Whitman Institute 2013 Grantee Perception Report

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Assessing funder performance is challenging and a range of data sources is required. The Grantee Perception Report (GPR) provides one set of perspectives that can be useful in understanding philanthropic funder performance and should be interpreted in light of The Whitman Institute's (TWI) particular goals and strategy. The survey covers many areas in which grantees' perceptions might be useful to your foundation. TWI should place emphasis on the areas covered according to your specific priorities. Low ratings in an area that is not core to your strategy may not be concerning.

### **Overview**

Overall, The Whitman Institute is rated more positively than the typical foundation on many measures in the GPR. In particular, TWI receives higher ratings than nearly all other funders whose grantees CEP has surveyed for its impact on and understanding of grantees' organizations. TWI grantees also rate the Foundation's understanding of their fields, the quality of funder-grantee interactions and communications, as well as the helpfulness of the selection process in strengthening their organizations more positively than typical. Grantees most frequently describe TWI as "thoughtful," "trusting" and "engaged."

Grantee feedback suggests the Foundation can build on its strengths outlined above to further improve its work with grantees. Specifically, grantees express an appetite for the Foundation to more broadly disseminate its strategy for working with grantees, as well as provide more non-monetary support to help their organizations build capacity and further their impact. There is also an opportunity for the Foundation to clarify how its plans to spend out will impact grantees.

### **Strong Understanding of Grantees' Fields with an Opportunity to Further Impact**

The Whitman Institute is rated in the top quartile of funders in CEP's comparative dataset for its understanding of grantees fields, and one grantee comments that "with its focus on relations, dialogue and connections, TWI makes an entirely unique contribution across a wide field of grantees in progressive service to life. This is an astonishing achievement." However, grantees rate TWI's impact on their fields less positively than its understanding, and lower than grantees at the typical Foundation. When asked to provide suggestions for how the Foundation could improve, grantees frequently comment that TWI could increase its impact in their fields by more publicly and proactively communicating their strategy and partnership model for working with grantees. Specifically, grantees say that the Foundation should "let the foundation world know how they operate and the quality of the

relationships they have with their grantees,” and “figure out how to spread the word to other funders that this model works and produces results.” TWI may also have an opportunity to further its impact on grantees’ fields through even more field-focused assistance beyond the grant. Grantees ask for “open gatherings or support groups,” and comment that “if they have other grantees who we could possibly help or we could learn from it would be useful to suggest connecting us.”

### **Exceptional Understanding of and Impact on Grantees’ Organizations**

The Whitman Institute is rated higher than typical for its impact on grantees’ organizations and higher than almost all other funders in CEP’s comparative dataset for its understanding of grantees’ goals and strategies. Grantees comment positively about the Foundation’s unique ability to understand their mission and goals. Grantees note that “I get the sense they are good friends who know our work and mission and trust that we play a role in advancing theirs.” As a result, grantees believe “TWI’s trust of the non-profits it works with...frees us up to focus on our core work and mission. If other funders followed the lead of TWI, much more work would be accomplished.” Notably, first-time grantees appear to have a less positive experience, rating the Foundation’s understanding of their organizations significantly lower than grantees that have received consistent funding from TWI. Moreover, first-time grantees rate the Foundation’s impact on their organizations below the median funder in the comparative dataset.

When asked how much the Foundation improved their ability to sustain the work funded by their grant in the future, grantees rate TWI higher than almost all other funders in CEP’s comparative dataset. Furthermore, those grantees receiving intensive non-monetary assistance from TWI as well as those specifically receiving assistance securing funding from other sources rate the Foundation significantly higher for the extent to which it improved their ability to sustain the work funded by their grant in the future.

Given the Foundation’s plans to spend out by 2022, grantees were also asked about the clarity of TWI’s communications surrounding its spend out strategy. Grantees rate positively for the clarity of TWI’s communications regarding “its intention to spend out,” the “timeline,” and “rationale for spending out,” but they rate comparatively less positively for “the implications for [the grantee] of its spending out.” Additionally, when asked to provide advice for how TWI should leave its legacy in the nonprofit sector, grantees most frequently suggest that the Foundation document and disseminate its unique strategy for working with grantees. Grantees suggest that the Foundation should “leverage your contacts with the big funders to get them to value humility, deep listening, real collaboration, true partnerships with community groups,” “convene funders and work with them to enact many TWI’s positive grantmaking practices,” and “reach out to other funders to initiate and extend dialogue on this topic.”

### **Outstanding Funder-Grantee Relationships**

The Whitman Institute is rated more positively than nearly every other funder in CEP’s comparative dataset for the strength of its relationships with grantees – a summary measure comprised of ratings related to the quality of interactions and communications. TWI grantees rate the Foundation higher than 98 percent of other funders whose grantees CEP has surveyed for the fairness of their treatment, grantees’ comfort approaching the Foundation if a problem arises, and responsiveness of the Foundation’s staff. One grantee notes that “The quality of TWI’s processes, interactions, and communications is very high. The accessibility to staff, the innovative thinking and practice, and

personal dedication to the mission is palpable.” Another comments “TWI is a model funder....This is the most responsive, visionary, and supportive funder we've worked with.”

CEP’s research has found that, field-wide, appropriate frequency and reciprocity of contact between grantees and their foundation contact is associated with stronger funder-grantee relationships. At TWI, the proportion of grantees that report interacting with the Foundation at least every few months is higher than typical. One grantee describes interactions as “very helpful in thinking through the communications processes that are at the core of our work” and another comments “I always feel that our contact is accessible and I feel comfortable discussing our organization's thinking, challenges, and needs.” Additionally, TWI has a typical proportion of grantees that report initiating contact with the Foundation as frequently as the Foundation initiates contact with them. These grantees rate the Foundation’s impact on and understanding of their local communities significantly more positively than other grantees. Finally, while many grantees praise the “human-level communications,” “meeting face-to-face,” and “regular conversations over the phone and in-person” that define their relationships, just 40 percent of grantees report receiving a site visit. One grantee suggests that visiting their work “would make a difference to [TWI] and I believe it would help them know more about what they are supporting.”

TWI grantees are also engaging with the Foundation’s communication resources differently than at the typical foundation. A larger than typical proportion of TWI grantees report participating in individual communications with the Foundation, and these grantees rate the helpfulness of individual communications more positively than do grantees at the typical foundation. However, the proportion of TWI grantees that report using the Foundation’s website is smaller than typical, and they also find it less helpful than typical. One grantee notes that “The in-person interaction from TWI is fantastic. The quality of that communication and interaction is not reflected in their online communication.” Perhaps unsurprisingly, when asked about potential resources from TWI for strengthening their organizations’ work, grantees ratings indicate they would find “small in-person meetings” and “quarterly mixers with TWI grantees” more useful than online resources such as a blog, Twitter feed, learning platform, and podcasted interviews. Grantees also rate group meetings with TWI to be more helpful than typical, however just one third of TWI grantees have used this resource. Grantees that have attended retreats describe the events as “an exceptional experience” and “bringing their grantees together for retreats has also been incredibly helpful - I gained many new ideas and new connections.” Given TWI’s already exceptionally strong relationships with grantees, there may be an opportunity to further enhance its focus on in-person connections with and between grantees as opposed to investing in a greater online presence.

### **Helpful Selection and Reporting Processes for Strengthening Grantees’ Organizations**

Grantees rate the helpfulness of TWI’s selection and reporting and evaluation processes in strengthening their organizations or programs more positively than those of most other funders whose grantees CEP has surveyed, and frequently comment positively about staff’s input and the flexibility of the Foundation’s processes. One grantee notes that “TWI staff was...efficient in the use of time to determine how both TWI and my organization met each other's strategic needs and overlapping values. I didn't feel that...they gave me unnecessary tasks to complete. I wish that more grant-makers followed TWI's process.” While grantees receive grants that, at the median, are slightly smaller than typical, they also spend fewer hours than typical on administrative requirements over the lifetime of the grant.

Therefore, the “dollar return” experienced by grantees places TWI in the top quartile of funders in CEP’s dataset.

Grantees frequently mention the perceived trust of TWI in their organization’s ability to carry about its work. Grantees comment that “TWI is unique in its grantmaking style, a style where supporting and respecting its grantees is paramount,” “TWI is the only such foundation we have worked with where we have felt a true partnership and complete trust and support of our work,” and “TWI builds relationships of trust that support organizations to mature and develop, take risks and build leadership and capacity...it really models the trust and partnerships that we all talk about as the centerpiece of collective impact.” Foundation staff are also substantially less involved in the development of grant proposals than is typical, and TWI grantees report a lower than typical amount of pressure to modify their organization’s priorities in order to create a grant proposal that was more likely to receive funding.

### **Provision of Assistance Beyond the Grant Check**

Most TWI grantees receive assistance from the Foundation beyond the grant check; specifically, they receive strategic planning advice, funding assistance, board development, and all forms of field-related assistance more often than grantees at the typical foundation. Moreover, more than half – a much larger than typical proportion – of TWI grantees receive what CEP describes as intensive “field-focused” or “comprehensive” patterns of assistance. CEP’s field-wide research finds that these intensive patterns of assistance are associated with more positive grantee experiences. At TWI, grantees receiving field-focused or comprehensive non-monetary assistance rate significantly higher than grantees receiving little or no non-monetary assistance on many measures in the report, including the Foundation’s understanding of and impact on both their local communities and organizations, as well as their relationships with the Foundation, the Foundation’s understanding of their fields, and the helpfulness of the selection and evaluation processes.

When asked about the helpfulness of specific Foundation efforts for assisting grantees in building connections, grantees rated each effort positively on an absolute scale, and found introduction to others through one-on-one meetings to be most useful. Additionally, when provided a list of potential resources for their organizations, grantees expressed the most interest in small in-person opportunities for peer learning and reflection around designated topics and quarterly mixers with TWI grantees and others in TWI’s network. Many grantees request even more non-monetary assistance when asked to provide suggestions for how the Foundation could improve. Specifically, grantees would like, “open gatherings or support groups that give more people an opportunity to be exposed to better tools of communication,” “additional materials, information, studies, case studies, best practices,” and “more trainings.”

## **Methodology**

The Center for Effective Philanthropy (CEP) surveyed 46 grantees of The Whitman Institute (TWI) during May and June of 2013. CEP received 41 completed responses for an 89 percent response rate.

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