

CONFIDENTIAL

Grantee Perception Report®

prepared for

The Walter & Elise Haas Fund

September 2012

VERSION 10/2/2012



THE CENTER FOR
EFFECTIVE PHILANTHROPY

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Executive Summary – Key Findings

The Walter and Elise Haas Fund (“Haas, Sr.”) is rated above the median funder on most measures in the Grantee Perception Report, and rates significantly higher on many measures relative to its 2007 report. The Fund receives particularly strong ratings for its understanding of grantees’ organizations, fields, and communities. Grantees describe the Fund as “supportive,” “thoughtful,” and “responsive,” and add that “Haas Sr. has been a true community champion in the San Francisco area in good times and in challenging times.”

Haas, Sr. grantees indicate that the Fund is having a significant impact on their organizations, fields, and communities – all areas that have received higher ratings since the 2007 Grantee Perception Report. In particular, grantees note that the Fund is advancing work in their fields: “The Fund is an innovator in the field, willing to take risks with grantees and support them throughout the process.” However beyond the Fund’s positive impact, grantees indicate that the Fund could still do more to provide assistance beyond the grant check.

Across the Grantee Perception Report, Haas, Sr. grantees report having many aspects of a positive relationship with the Fund. Many grantees comment that their relationship with the Fund is among the best funding relationships they have, noting that Haas Sr.’s staff is “consistently professional, helpful, and deeply committed.” However, there may be an opportunity for the Fund to improve on one of several characteristic associated with strong relationships: balancing the proportion of grantees that report that they most frequently initiate contact with the Fund.

Though many grantees express gratitude for the Fund’s “streamlined” processes, they provide mixed feedback around the helpfulness of those processes in strengthening their organizations and programs. Haas, Sr. grantees report spending *less* time than typical on the Fund’s proposal and selection process, but also report spending *more* time than typical on the Fund’s reporting and evaluation process. Grantees’ perceptions of the helpfulness of these processes vary – grantees that have more involved engagement around these processes tend to rate them to be more helpful.

The largest proportion of Haas, Sr. grantees cite the characteristics of the Fund’s grants as a way in which the Fund could improve. A handful of grantees suggest that the Fund consider providing multi-year grants in addition to the operating grants it often provides, and grantees that do report receiving multi-year support rate the Fund higher for its impact on grantees’ ability to sustain the work funded by the grant. (It should be noted that the Fund made a decision to stop giving multi-year grants between 2010 and 2012, but will resume doing so in some cases in 2013)

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Background

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

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

Methodology – The Fund’s Grantee Survey

- ♦ The Center for Effective Philanthropy (CEP) surveyed the grantees of The Walter & Elise Haas Fund (“Haas, Sr.”) during February and March 2012. CEP has surveyed Haas, Sr.’s grantees in the past. Where possible, ratings from these surveys are also shown in the report. The details of Haas, Sr.’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
Haas, Sr. 2012	May and June 2012	2011	237	174	73%
Haas, Sr. 2007	February and March 2007	2006	243	193	79%

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

Grant Programs ²	Number of Grantees Surveyed	Number of Responses Received	Survey Response Rate
The Arts	66	53	80%
Economic Security	45	29	64%
Jewish Life	34	23	68%
Education	34	30	88%
Disaster Preparedness	6	6	100%
Safety Net	33	22	67%
Other	19	11	58%

- ♦ 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 Fund 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: Creative Work Fund grantee responses are not included in the Fund’s overall average rating. These grantees ratings are summarized in a separate tabular report.

Methodology – Comparative Data

- ♦ Haas, Sr.’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	41,459 grantees
Philanthropic Funders	284 funders

- ♦ Haas, Sr. is also compared to a cohort of 14 comparative cohort funders. The group of 14 private, regionally-focused funders comprises the following funders:

Comparative Cohort Foundations	
Blandin Foundation	Kronkosky Charitable Foundation
Cannon Foundation	Lenfest Foundation
Dekko Foundation	Lloyd A. Fry Foundation
Eugene and Agnes E. Meyer Foundation	Nina Mason Pulliam Charitable Trust
France-Merrick Foundation	S. H. Cowell Foundation
Gaylord and Dorothy Donnelley Foundation	T.L.L. Temple Foundation
John R. Oishei Foundation	Walter & Elise Haas Fund

- ♦ Within this report, CEP describes the comparison between Haas, Sr. grantee ratings and grantee ratings of other funders based on the percentile rank of Haas, Sr.. On measures with a 1-7 scale, grantee ratings for Haas, Sr. 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 Haas, Sr. 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 Fund 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, Haas, Sr. awards smaller and shorter grants, but awards a larger than typical proportion of its grantees with operating support.

Survey Item	Haas, Sr. 2012	Haas, Sr. 2007	Full Dataset Median	Comparative Cohort Foundation Median
Grant Size				
Median grant size	\$40K	\$40K	\$60K	\$48K
Grant Length				
Average grant length	1.5 years	1.6 years	2.1 years	2.0 years
Percent of grantees receiving multi-year grants	25%	39%	49%	42%
Type of Support				
Percent of grantees receiving operating support	32%	14%	20%	25%
Percent of grantees receiving program/project support	64%	80%	64%	51%
Percent of grantees receiving other types of support	4%	6%	16%	24%

Structural Characteristics of Grantees

- ♦ This table is intended to provide context to the Fund 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, Haas, Sr. grantees are smaller organizations that are more likely to have conducted programs for more than 6 years.

Survey Item	Haas, Sr. 2012	Haas, Sr. 2007	Full Dataset Median	Comparative Cohort Foundation Median
Budget of Funded Organizations				
Typical organizational budget	\$1.2MM	\$1.0MM	\$1.4MM	\$1.1MM
Duration of Funded Program and Grantee Organization				
Programs conducted 6 years or more	46%	N/A	33%	45%
Median length of establishment of grantee organizations	23 years	22 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.

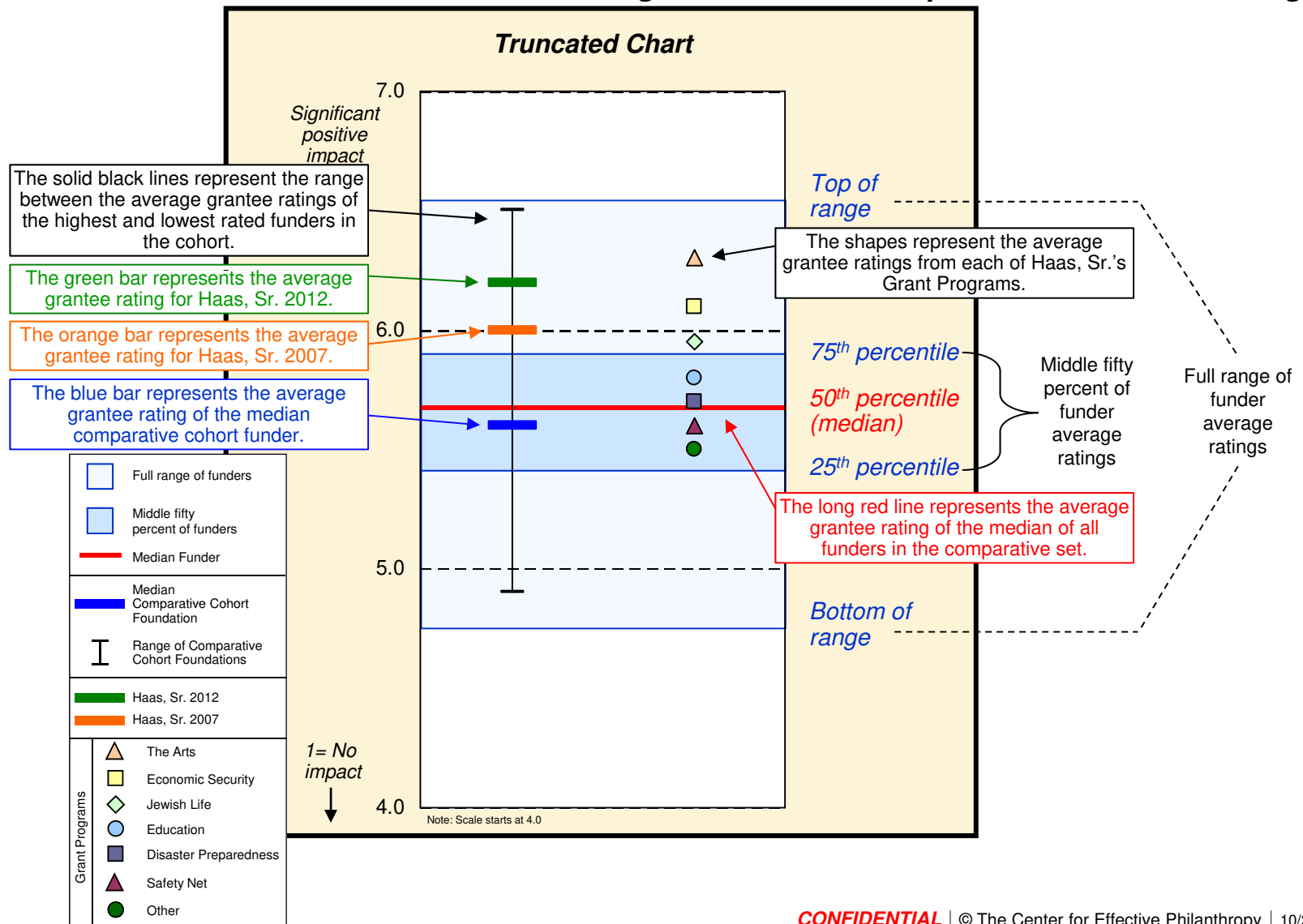
Structural Characteristics of Funders

- ◆ This table is intended to provide context to the Fund 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 Haas, Sr. is larger than that of the typical funder.

Survey Item	Haas, Sr. 2012	Haas, Sr. 2007	Full Dataset Median	Comparative Cohort Foundation Median
Program Staff Load				
Dollars awarded per program staff full-time employee	\$3.0MM	\$1.3MM	\$2.5MM	\$2.5MM
Applications per program full-time employee	52 applications	35 applications	27 applications	38 applications
Grants awarded per program full-time employee	59 grants	N/A	19 grants	29 grants
Active grants per program full-time employee	59 grants	29 grants	31 grants	50 grants

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 Haas, Sr., over a background that shows percentiles for the average ratings for the full comparative set of 284 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 Fund?”

Note: The size of each word indicates the frequency with which it was written by grantees.



11 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.

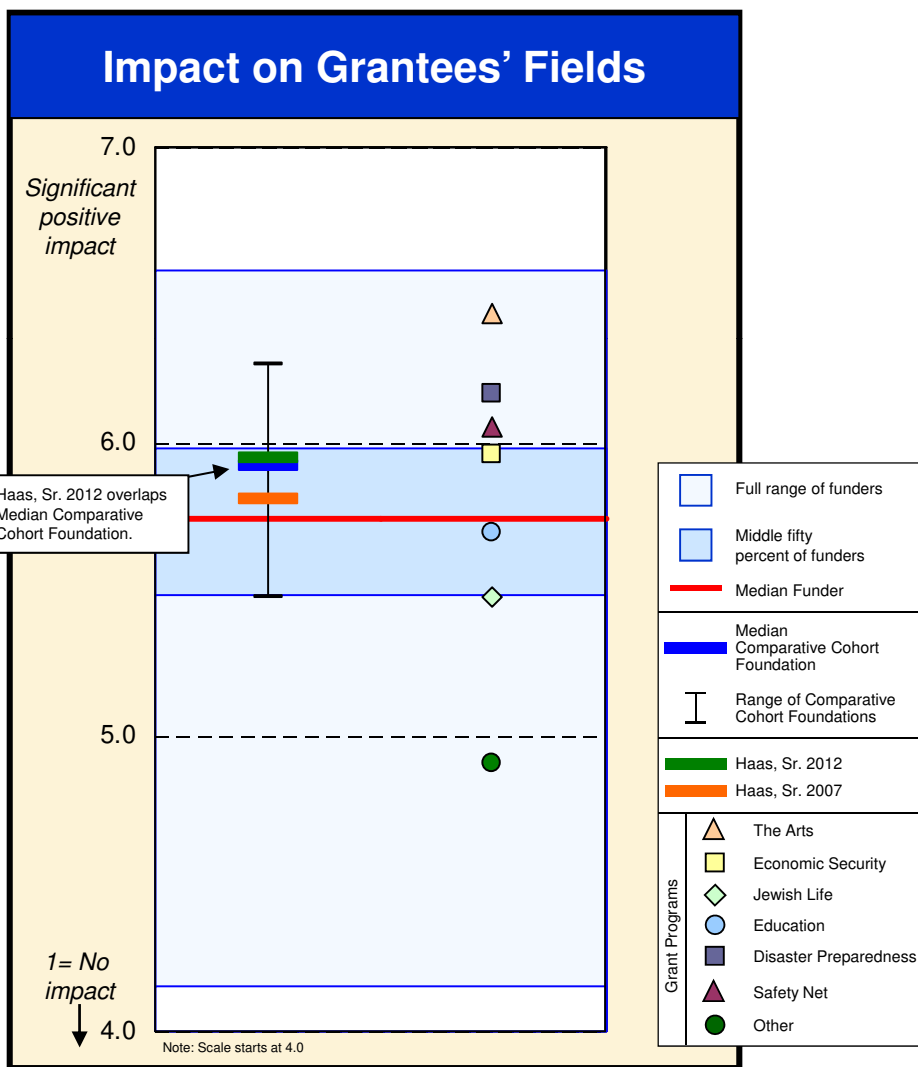
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Impact on Grantees' Fields

On impact on grantees' fields, Haas, Sr. is rated:

- above 72 percent of funders
- below 54 percent of comparative cohort funders in the cohort



Selected Grantee Comments

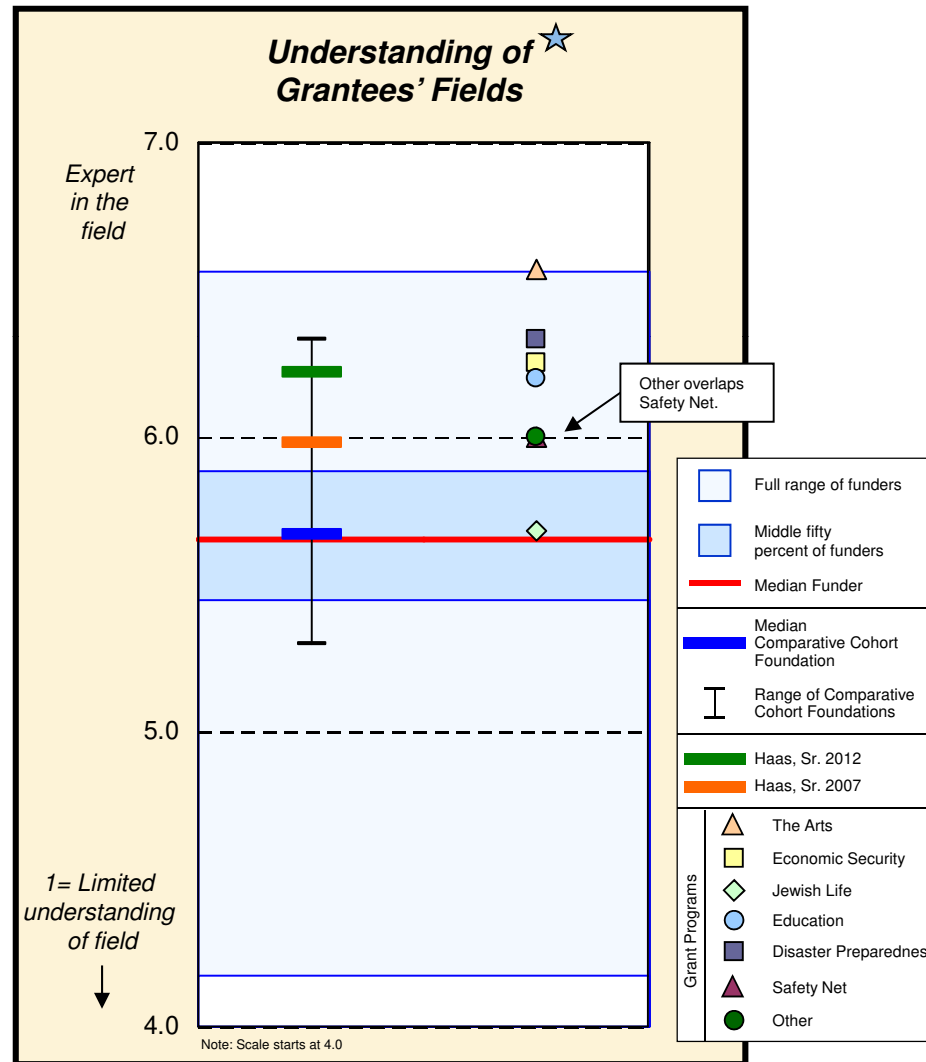
- ♦ *“Haas Sr. has stood together with other Bay Area Funders to advocate for best practices in the field.”*
- ♦ *“The Haas Fund takes chances on smaller...groups, which is the greatest impact they provide in our field. Many funders pre-select and go for the bigger names, leaving out many voices and possible avenues for innovation. They make [our field] happen in SF.”*
- ♦ *“The impact from grants through the Fund has been substantial....Through their commitment to ‘building community’ and therefore ‘building collaborations as well as agencies’ they have made a huge impact on the non-profit community.”*
- ♦ *“The most important impact has been that we have been able to leverage other funding because of their support or use their funds to jump-start special projects with multiple funders.”*
- ♦ *“Our last two grants from the Fund have had an enormous impact on our capacity to develop, expand and deepen the programs and resources we offer to the [field].”*

Note: This question includes a “don’t know” response option; 9 percent of Haas, Sr. 2012 respondents answered “don’t know”, compared to 8 percent at the median funder, 13 percent of Haas, Sr. 2007 respondents, and 8 percent of respondents at the median comparative cohort funder.

Understanding of Grantees' Fields

On understanding of grantees' fields, Haas, Sr. is rated:

- above 98 percent of funders
- above 92 percent of comparative cohort funders in the cohort



Note: This question includes a "don't know" response option; 3 percent of Haas, Sr. 2012 respondents answered "don't know", compared to 6 percent at the median funder, 6 percent of Haas, Sr. 2007 respondents, and 5 percent of respondents at the median comparative cohort funder.

★ = Haas, Sr. 2012 rating is significantly higher than Haas, Sr. 2007 rating at a 90 percent confidence interval.

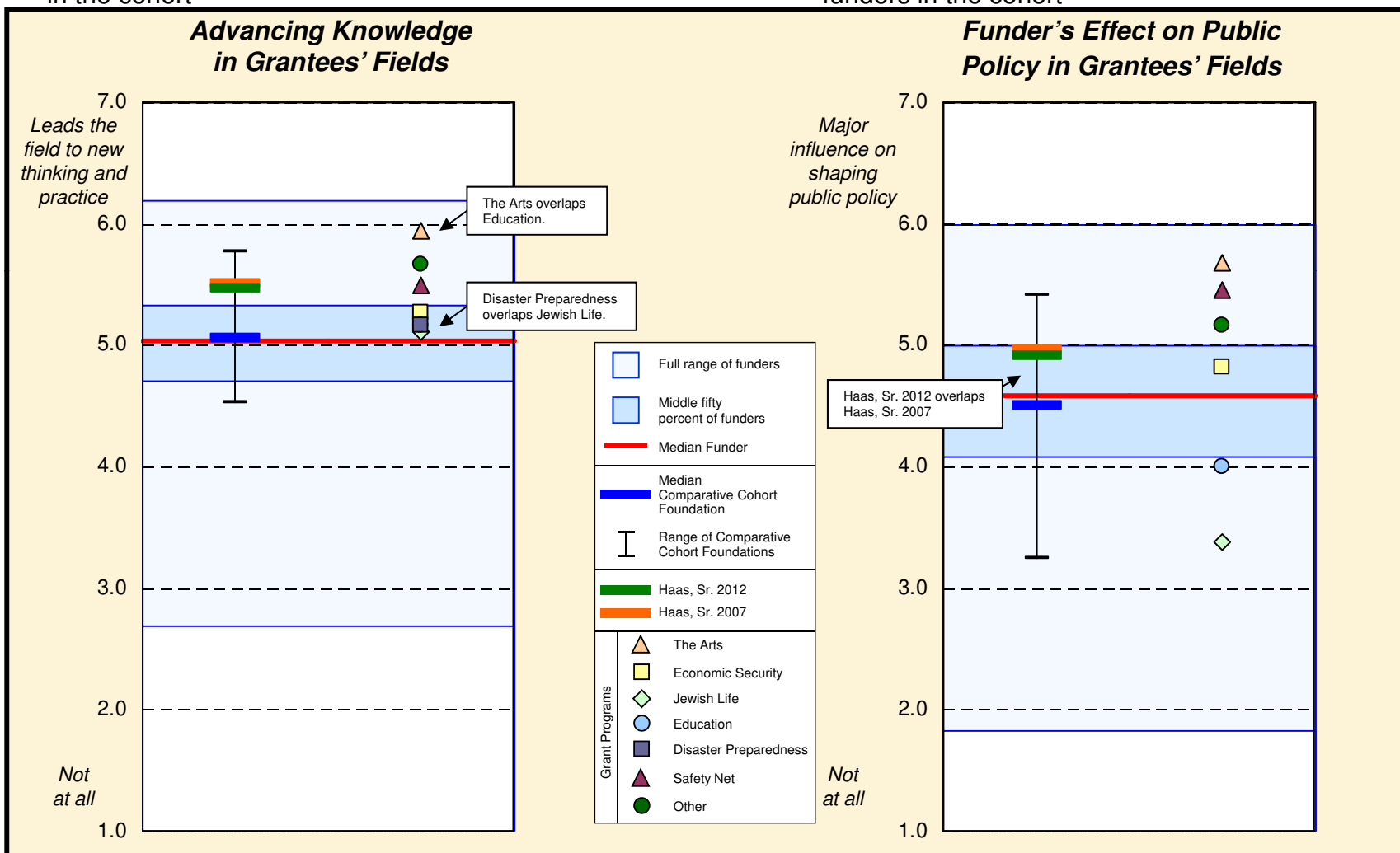
Advancing Knowledge in Fields and Effect on Public Policy

On advancement of knowledge in grantees' fields, Haas, Sr. is rated:

- above 83 percent of funders
- above 85 percent of comparative cohort funders in the cohort

On effect on public policy in grantees' fields, Haas, Sr. is rated:

- above 71 percent of funders
- above 92 percent of comparative cohort funders in the cohort

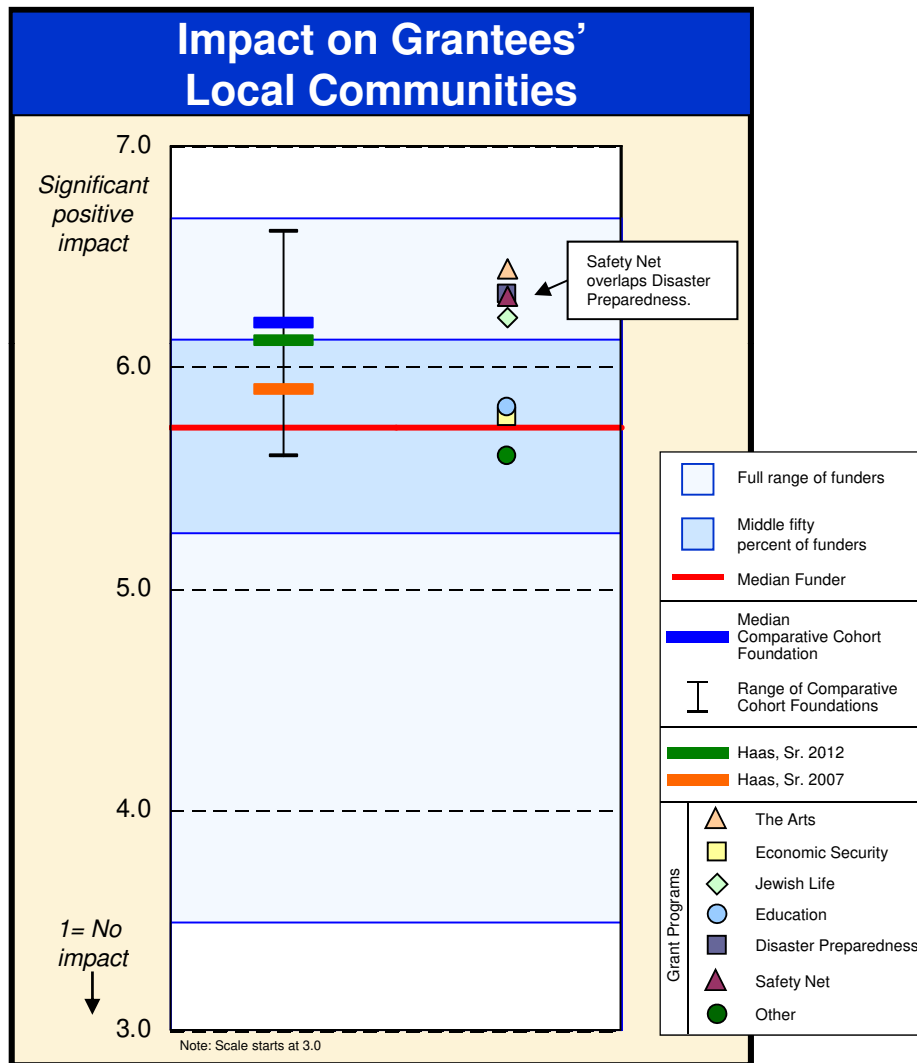


Note: The questions depicted on these charts include a "don't know" response option. In the left-hand chart, 36 percent of Haas, Sr. 2012 respondents answered "don't know", compared to 23 percent at the median funder, 35 percent of Haas, Sr. 2007 respondents, and 28 percent of respondents at the median comparative cohort funder. In the right-hand chart, 51 percent of Haas, Sr. 2012 respondents answered "don't know", compared to 37 percent at the median funder, 50 percent of Haas, Sr. 2007 respondents, and 47 percent of respondents at the median comparative cohort funder. Disaster Preparedness data not shown because fewer than five responses to the question were received.

Impact on Grantees' Local Communities

On impact on grantees' local communities, Haas, Sr. is rated:

- above 74 percent of funders
- below 69 percent of comparative cohort funders in the cohort



Selected Grantee Comments

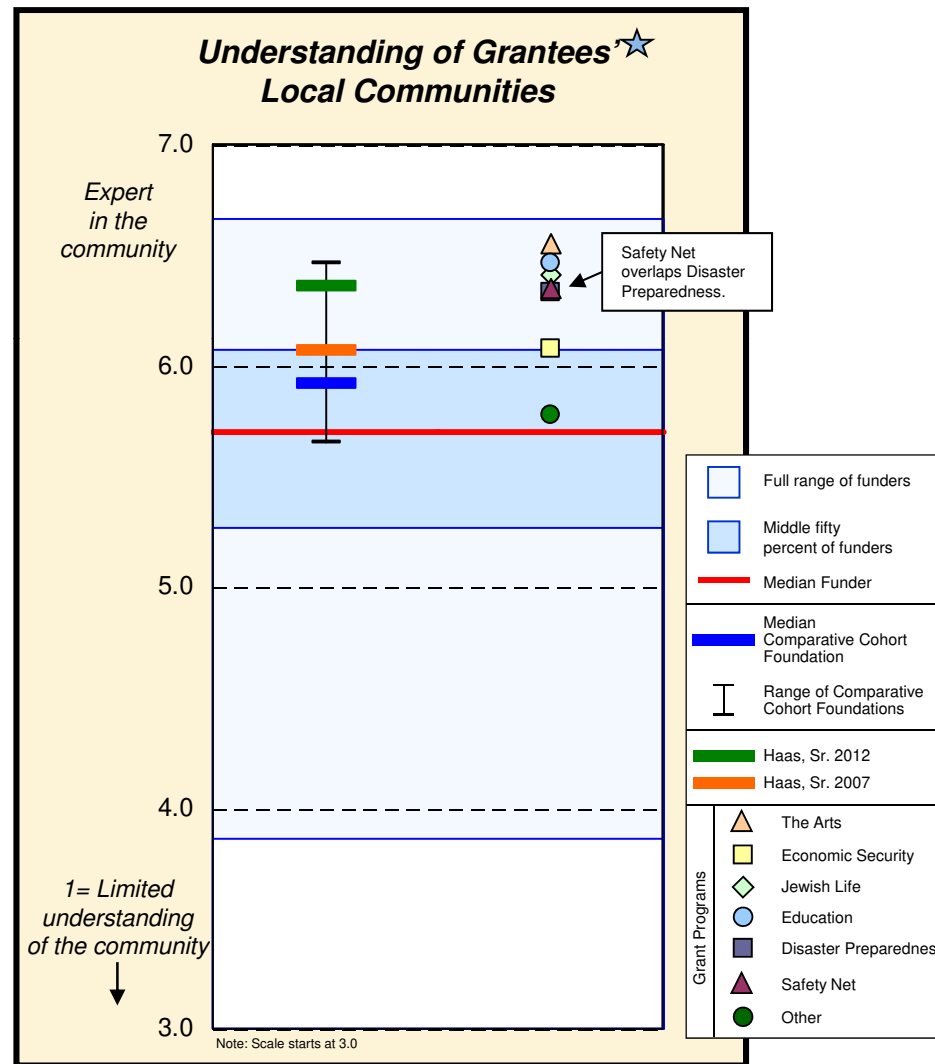
- ♦ *"The Fund not only provides much needed resources to organizations but it also serves as a wonderful community resource for the smaller organizations that may not have the time or expertise to focus on policy issues."*
- ♦ *"We appreciate that the Fund has been a very active partner in understanding and addressing the needs of the community - particularly during the economic recession.... As most organizations have had major cuts to funding, it's good to know that the Fund is active in the community."*
- ♦ *"The Haas Fund is very connected to the needs of San Francisco communities in building assets and training for career path jobs."*
- ♦ *"Haas has been a true community champion in the San Francisco area in good times and in challenging times."*

Note: This question includes a "don't know" response option; 9 percent of Haas, Sr. 2012 respondents answered "don't know", compared to 10 percent at the median funder, 11 percent of Haas, Sr. 2007 respondents, and 6 percent of respondents at the median comparative cohort 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, Haas, Sr. is rated:

- above 92 percent of funders
- above 77 percent of comparative cohort funders in the cohort



Note: This question includes a "don't know/not applicable" response option; 6 percent of Haas, Sr. 2012 respondents answered "don't know/not applicable", compared to 12 percent at the median funder, 10 percent of Haas, Sr. 2007 respondents, and 8 percent of respondents at the median comparative cohort funder.

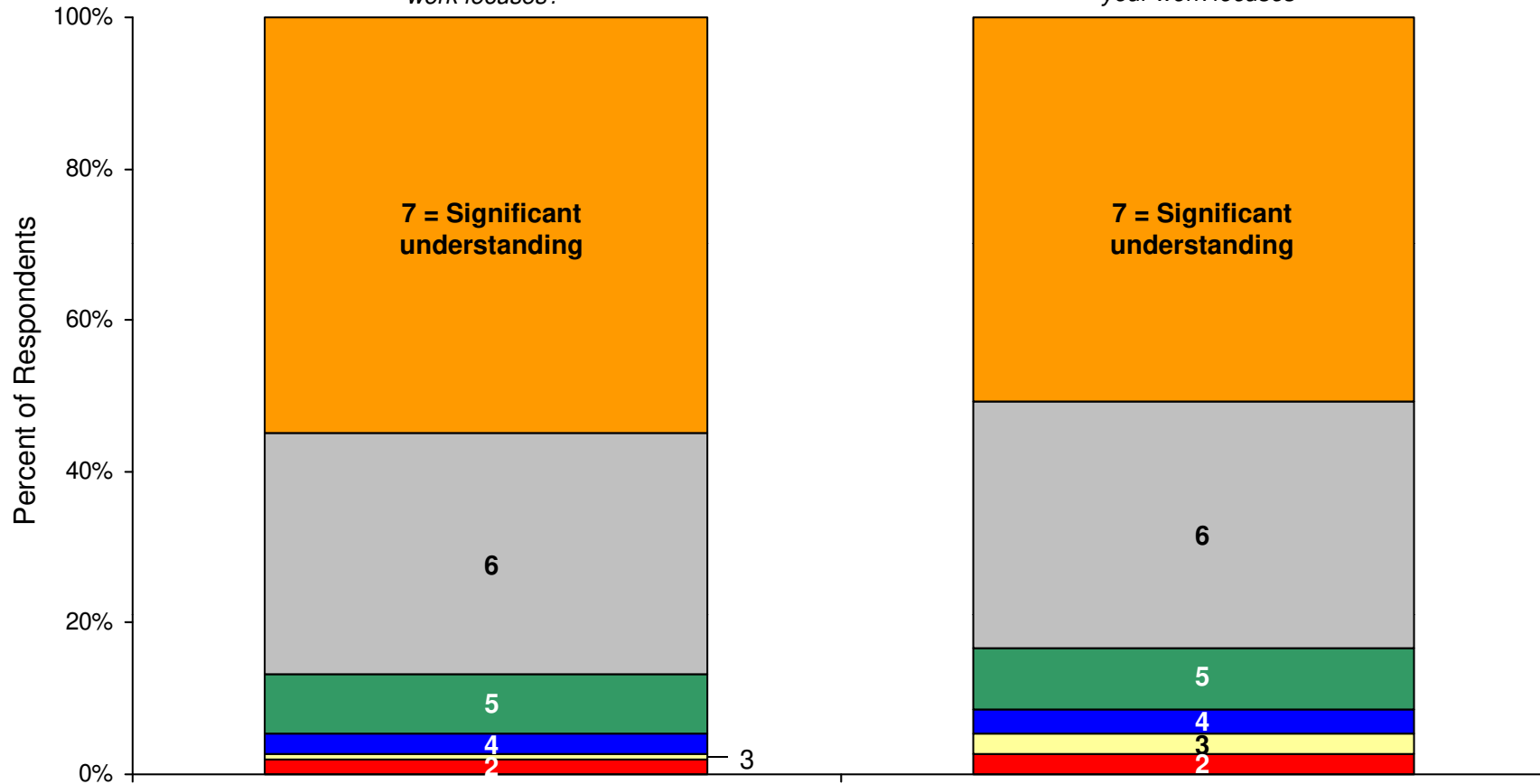
Diversity

Haas, Sr. grantees were asked how well the Fund understands issues of diversity within their local communities and fields, with 1 = “No understanding” and 7 = “Significant understanding.” Grantees indicate that the Fund has a strong understanding of their fields and communities – over eighty percent of grantees rate the Fund’s understanding of their community and field using a 6 or 7.

“How well does the Fund understand issues of diversity within...”

“The local community in which your work focuses?”

“The field on which your work focuses”



Haas, Sr. Average Rating	6.3	6.2
Don't think these issues are relevant	2%	2%
Don't know	10%	12%

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

Beneficiary Demographics

Haas, Sr. grantees were asked to estimate the proportion of their beneficiary population representing different demographics. Grantees were asked to check all that apply. This table shows the percent of beneficiaries in each proportion along the top.

“Please estimate the proportion of your beneficiary population representing each of the following groups”

Demographic	0-25%	26-50%	51-75%	76-100%	Don't Know	Not Applicable
White	46%	29%	11%	10%	2%	2%
Jewish	43%	10%	5%	9%	25%	8%
LGBT	55%	15%	1%	3%	21%	5%
Hispanic	41%	41%	11%	3%	3%	2%
African American	54%	32%	8%	3%	1%	2%
Asian	56%	33%	4%	2%	2%	2%
American Indian	86%	1%	-	-	7%	6%
Native Hawaiian/Pacific Islander	86%	2%	1%	-	5%	7%
Middle-Eastern	77%	6%	1%	-	10%	6%
Muslim	57%	3%	1%	-	28%	11%

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

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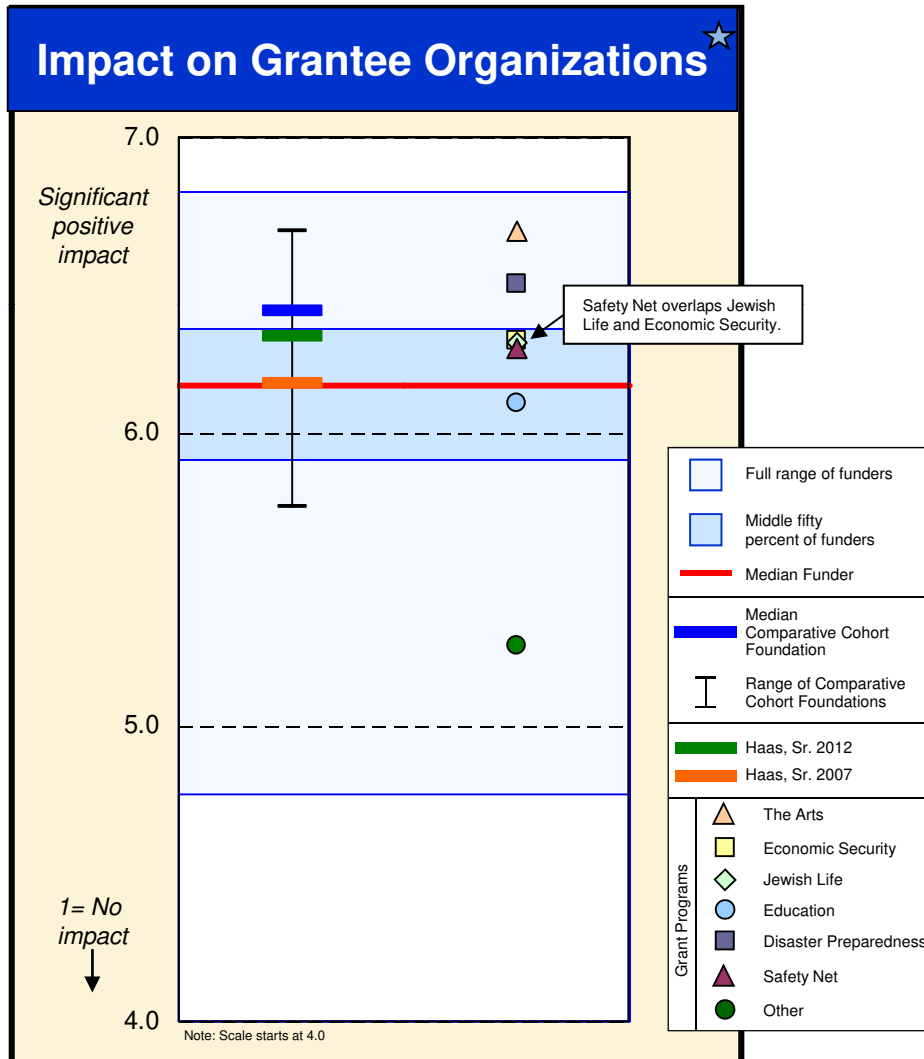
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Impact on Grantee Organizations

On impact on grantee organizations, Haas, Sr. is rated:

- above 73 percent of funders
- below 69 percent of comparative cohort funders in the cohort



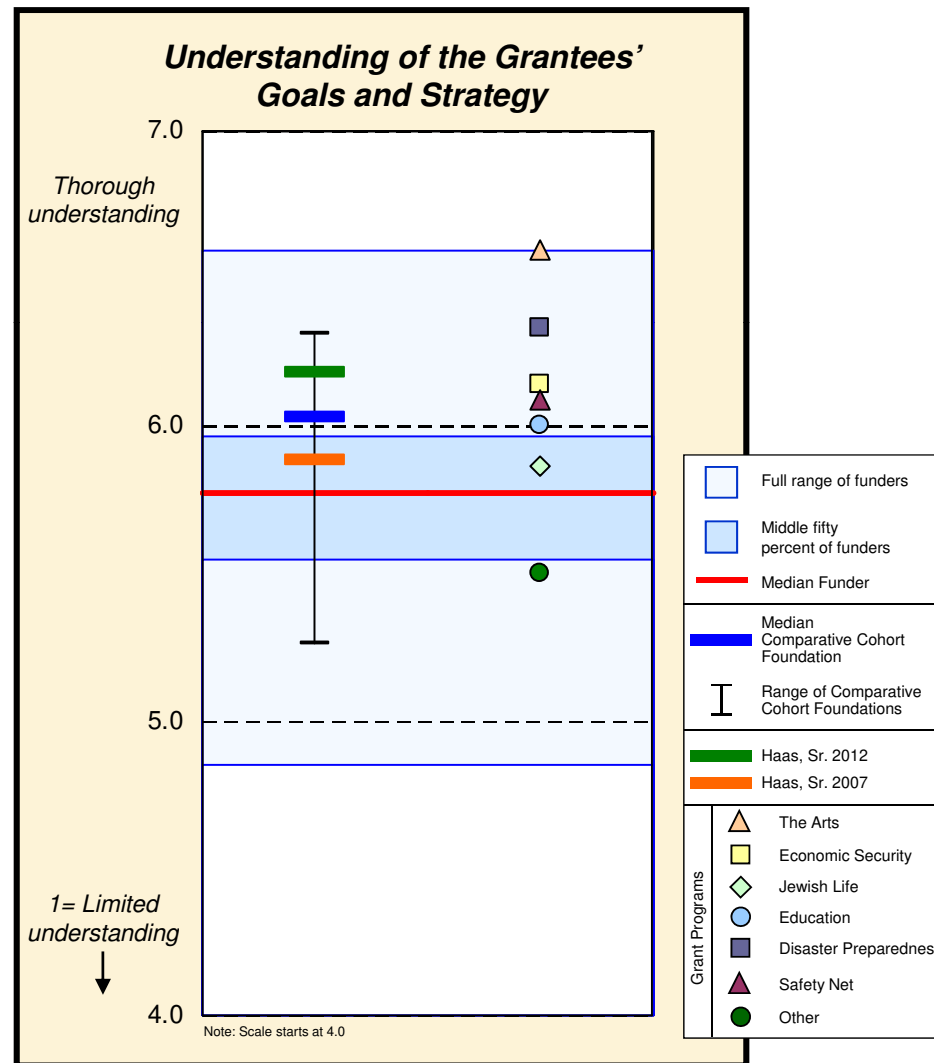
Selected Grantee Comments

- ♦ “Although our organization has had some very difficult years, the Fund has remained accessible to us and has offered support and advice (even in years in which little or no funding was offered). We count on the Program Officer to be a sounding board and resource to us in becoming a high-functioning nonprofit.”
- ♦ “Our fund advisor has a passion for our work and has lent insights to ways to maximize our resources to effectively advance the work of the organization.”
- ♦ “The Walter and Elise Haas Foundation is enabling [our organization] to continue to provide year-round [services]... Without the Fund's support we would not be able to continue at this level or quality of service.”
- ♦ “I love the way they ask questions. I think often that funders don't ask hard questions, because, well, because they are hard. Our grants manager has always pushed us to think harder, learn more and report more efficiently, and that has been so valuable to us.”

Understanding of Grantees' Goals and Strategy

On understanding of grantees' goals and strategy, Haas, Sr. is rated:

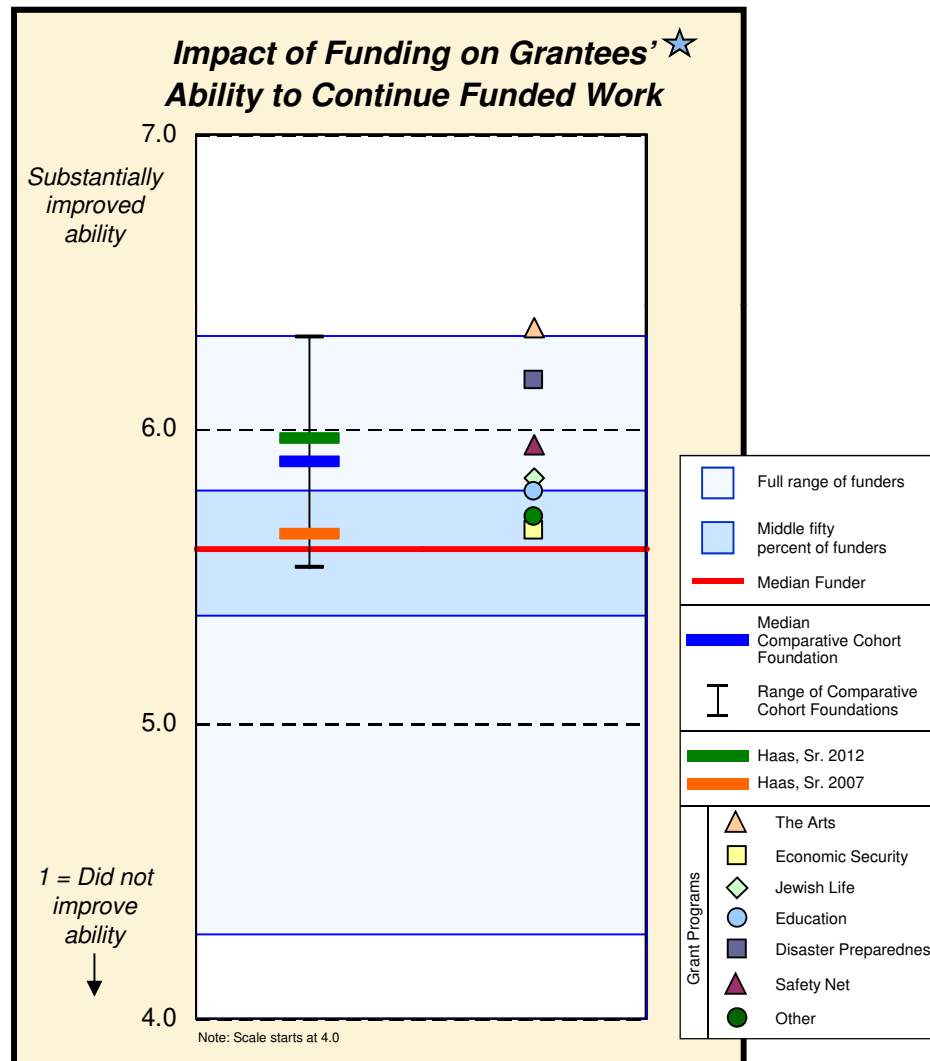
- above 93 percent of funders
- above 83 percent of comparative cohort funders in the cohort



Impact on Sustainability of Funded Work

On the effect of the Fund's funding on grantees' ability to sustain the work funded by the grant in the future, Haas, Sr. is rated:

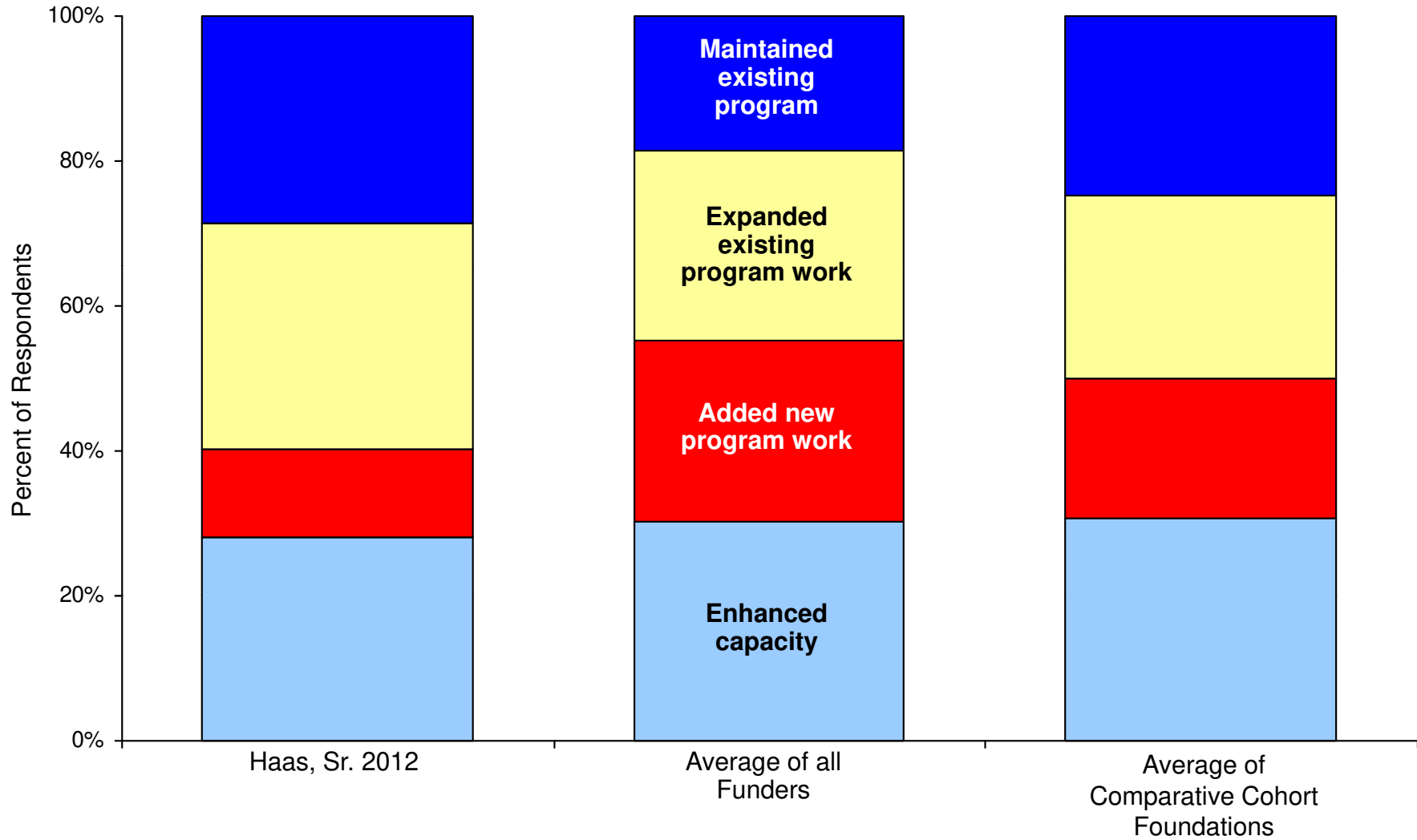
- above 87 percent of funders
- above 67 percent of comparative cohort funders in the cohort



Note: This question includes a "don't know/not applicable" response option; 9 percent of Haas, Sr. 2012 respondents answered "don't know/not applicable", compared to 8 percent at the median funder, and 8 percent of respondents at the median comparative cohort funder.

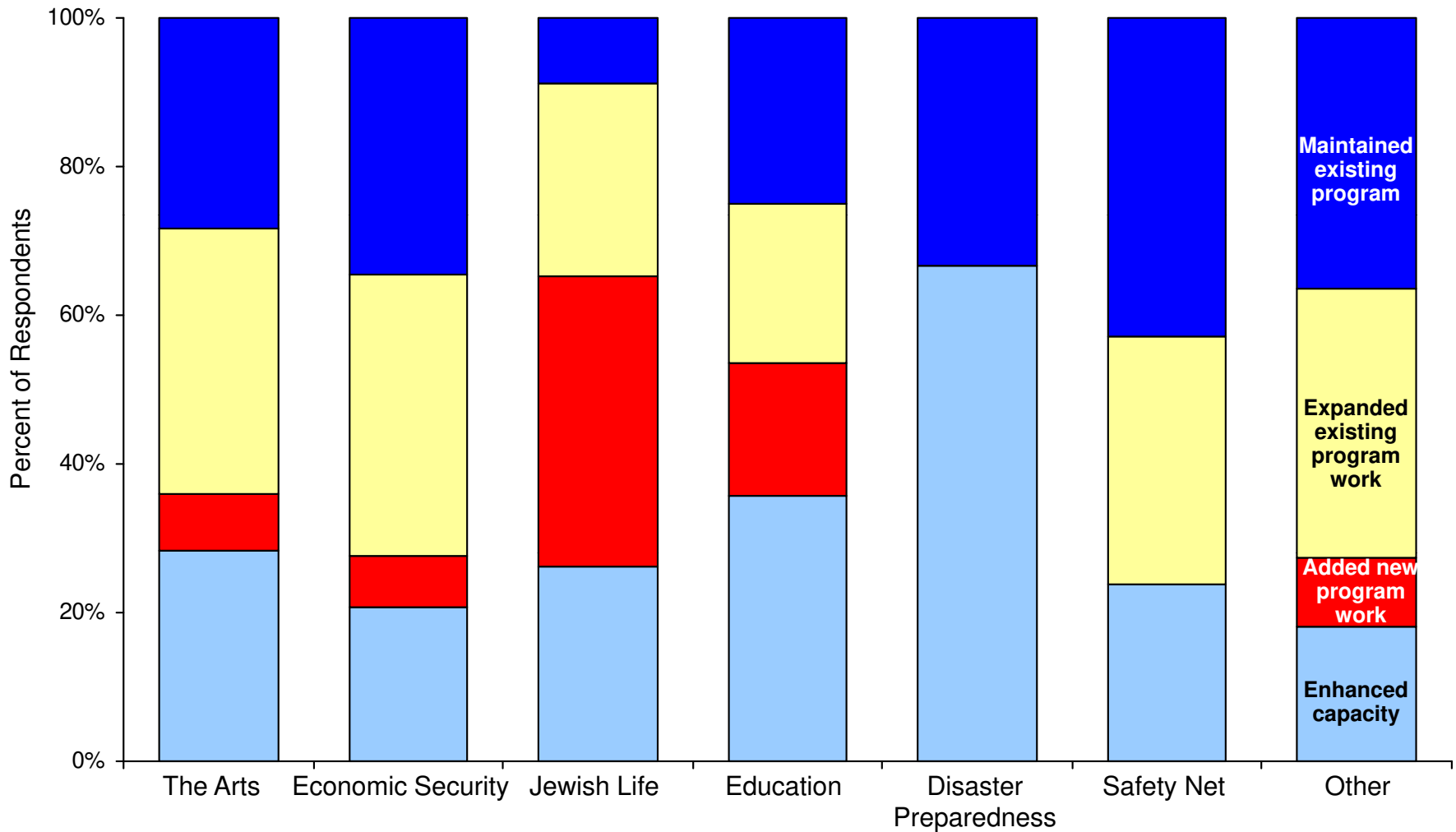
Grant Effect (1)

Primary Effect of Grant on Grantee's Organization



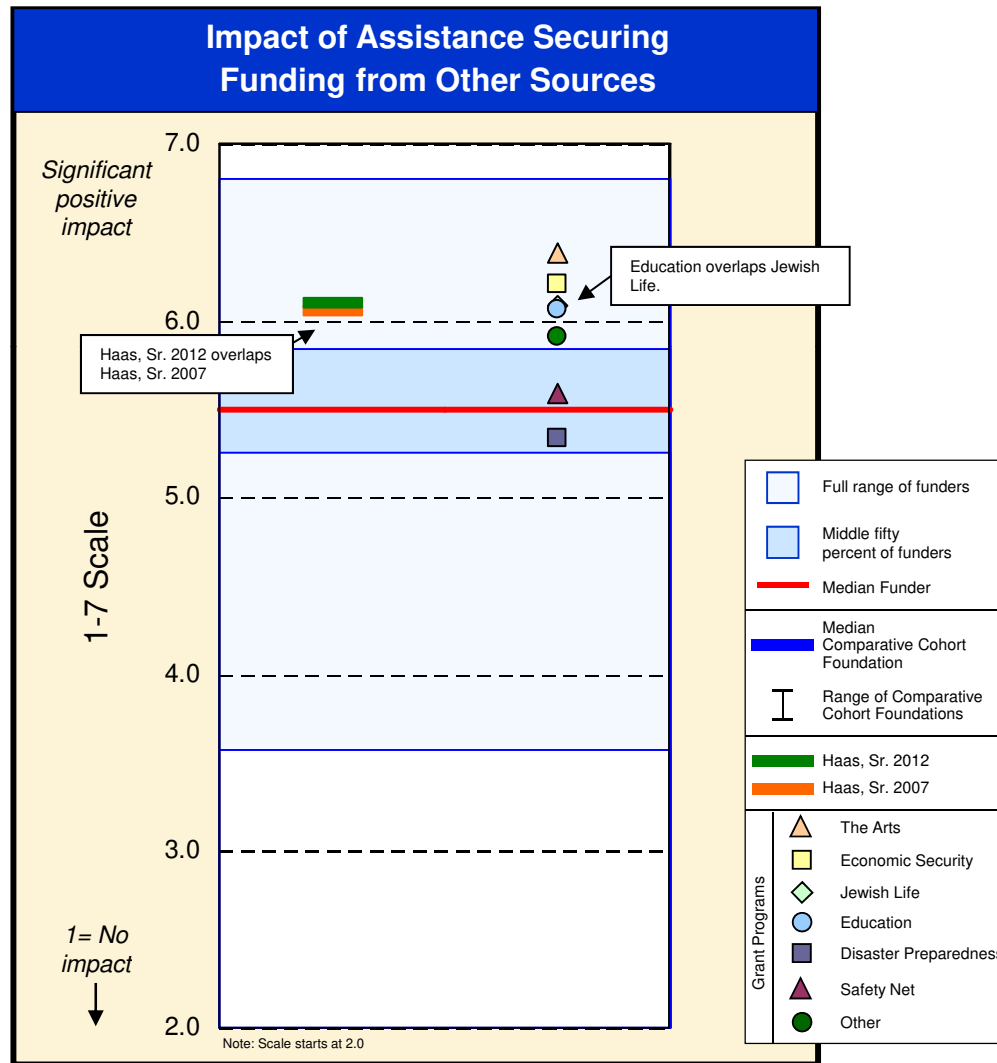
Grant Effect (2)

Primary Effect of Grant on Grantee's Organization



Outside Funding Sources

Haas, Sr. grantees were asked to rate the extent to which the Fund's reputation lent credibility to their efforts to obtain additional funding from other sources, with 1 = "No impact" and 7 = "Significant positive impact." The majority of grantees indicate that the Fund's reputation provided a positive impact on their attempts to secure other funding.



Note: Comparative data through 2010. Comparative cohort funder data not available due to changes to the survey instrument.

Grant Characteristics

Haas, Sr. grantees were asked to rate the extent to which agree with that the type, length, and size of their grant was appropriate, with 1 = “Strongly disagree” and 7 = “Strongly agree.” Grantees most strongly agree that the type of grant provided by the Fund was appropriate.

Measure	Haas, Sr. 2012	Full Dataset Median
Appropriateness of Grant Characteristics to Achieve the Specific Results the Fund Expects		
Appropriateness of the size of the grant (1=“Strongly disagree”, 4=“Neither agree nor disagree”, and 7=“Strongly agree”)	5.3	5.3
Appropriateness of the length of the grant commitment (1=“Strongly disagree”, 4=“Neither agree nor disagree”, and 7=“Strongly agree”)	5.3	5.5
Appropriateness of the type of grant (e.g., program, operating, etc.) (1=“Strongly disagree”, 4=“Neither agree nor disagree”, and 7=“Strongly agree”)	6.4	6.2

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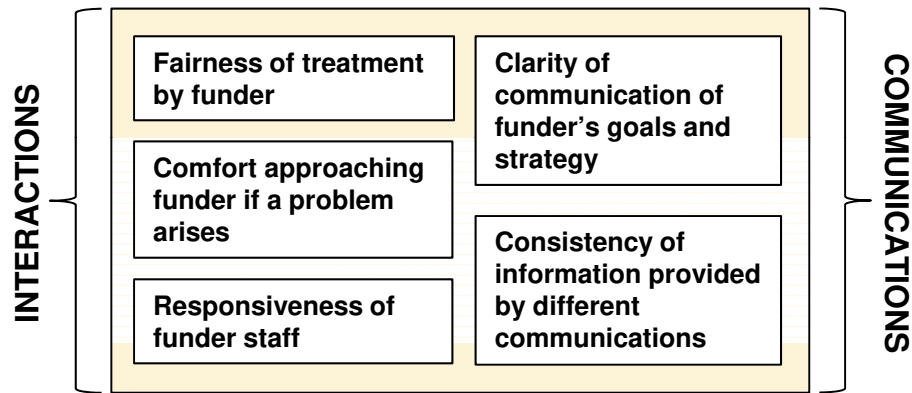
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Funder-Grantee Relationships Summary

On this summary of key components of funder-grantee relationships, Haas, Sr. is rated:

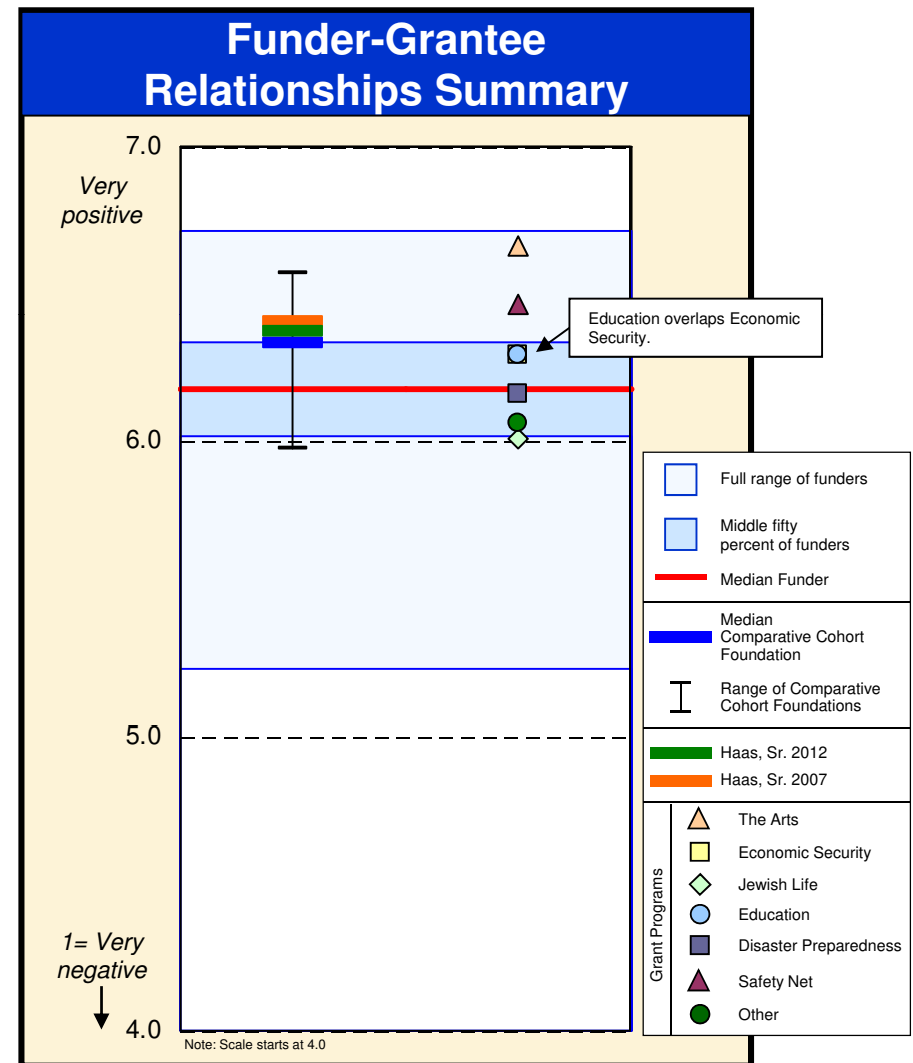
- above 81 percent of funders
- above 67 percent of comparative cohort funders in the cohort

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 Fund if a problem arises, responsiveness of the Fund staff, fairness of the Fund's treatment of grantees, clarity of communication of the Fund'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, Haas, Sr. is rated:

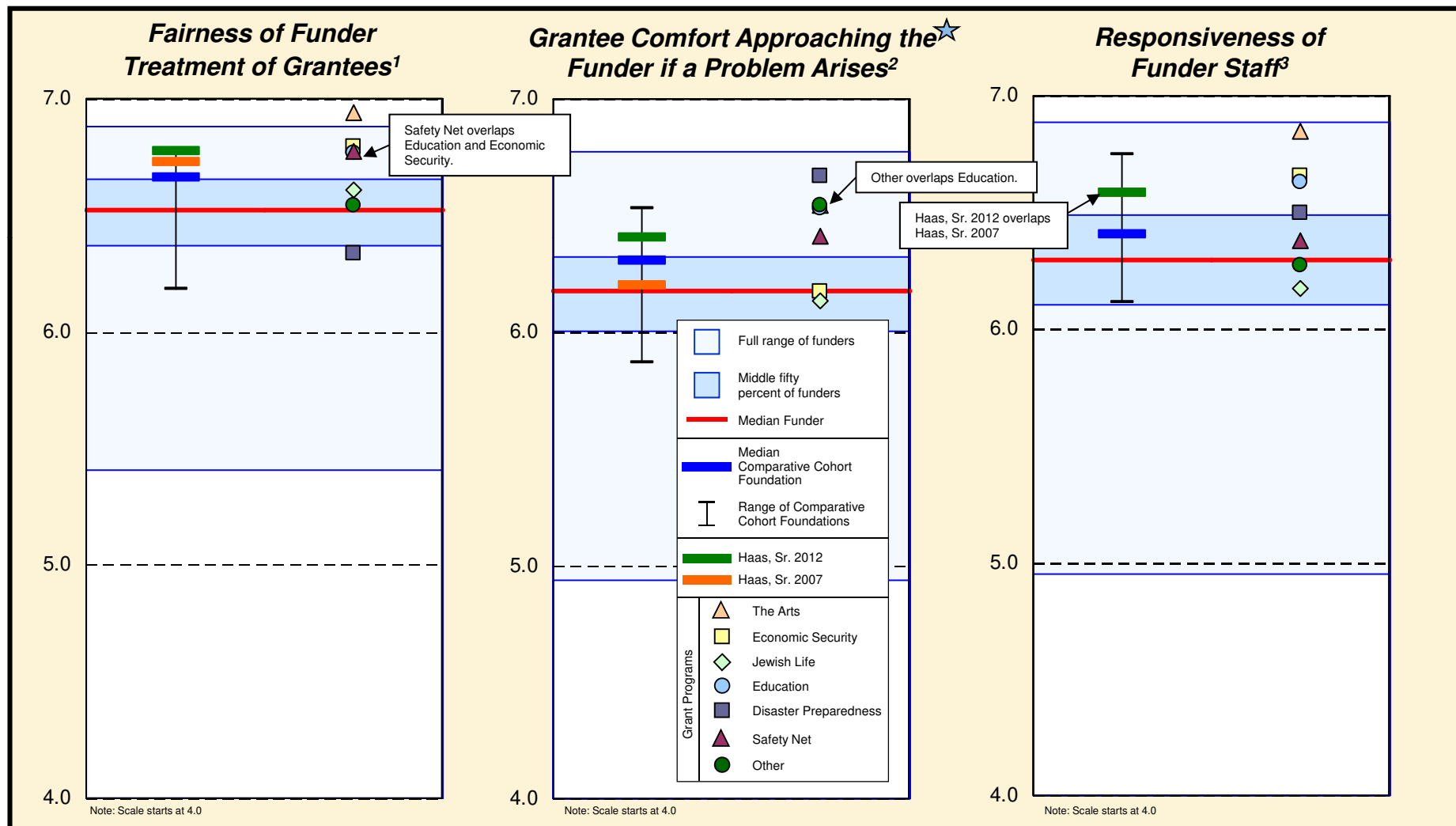
- above 94 percent of funders
- above 92 percent of comparative cohort funders in the cohort

On grantees' comfort in approaching the Fund if a problem arises, Haas, Sr. is rated:

- above 87 percent of funders
- above 85 percent of comparative cohort funders in the cohort

On responsiveness of Fund staff to grantees, Haas, Sr. is rated:

- above 88 percent of funders
- above 77 percent of comparative cohort 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.

Selected Grantee Comments

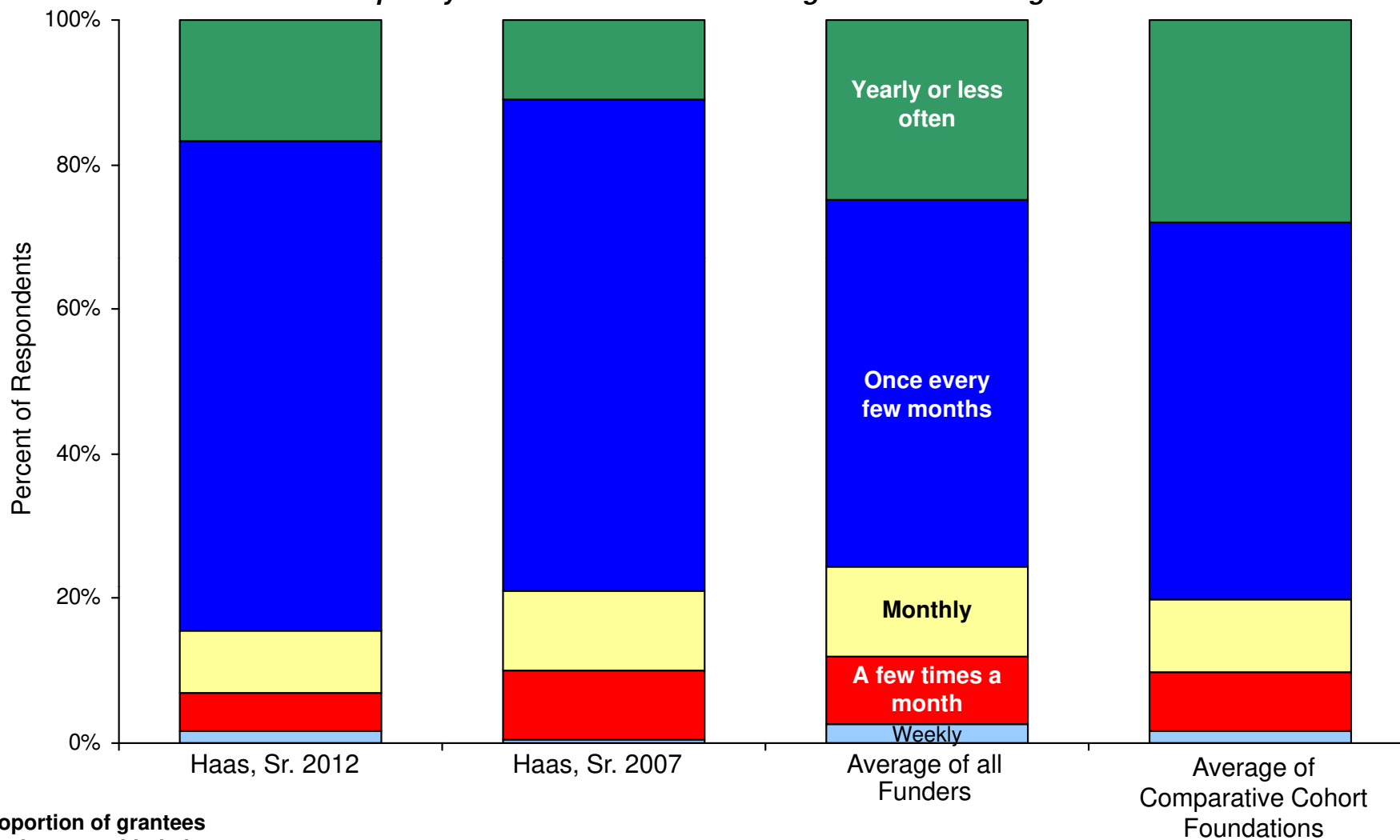
- ◆ *“The Fund is clear and professional in all its processes, interactions and communications, and responds quickly to inquiries and requests for information.”*
- ◆ *“The Fund is exceptionally supportive, clear and accommodating. We consider our interactions with Haas to be among the best funding relationships we have. We are deeply appreciative of staff support and assistance.”*
- ◆ *“Our program officer is hands down the best we have ever worked with, for several reasons. She is extremely knowledgeable about the field, and creates a space where honest conversations can occur about challenges, successes, and ideas.”*
- ◆ *“I have found my interactions with the Fund and its officers to be consistently professional, helpful, and deeply committed to making sure that the best projects to serve their mission are selected and that once a project has been selected it receives the support necessary. Never for a second did I doubt that this organization wanted anything but the best possible work from all involved.”*
- ◆ *“The Foundation stands out among foundations we work with. [Our program officer] is an absolute gem who goes about her work in a systematic, inquiring, and organized way. She is both responsive and engaged. She obviously has deep knowledge of our field and is the only grantmaker I consistently see at relevant events. We feel very lucky to receive support from the foundation.”*

Frequency of Interactions (1)

The proportion of Haas, Sr. grantees that report interacting with their program officer yearly or less often is:

- smaller than that of 58 percent of funders
- smaller than that of 85 percent of comparative cohort funders in the cohort

Frequency of Grantee Contact with Program Officer During Grant



Proportion of grantees that interact with their PO yearly or less often¹ **17%**

11%

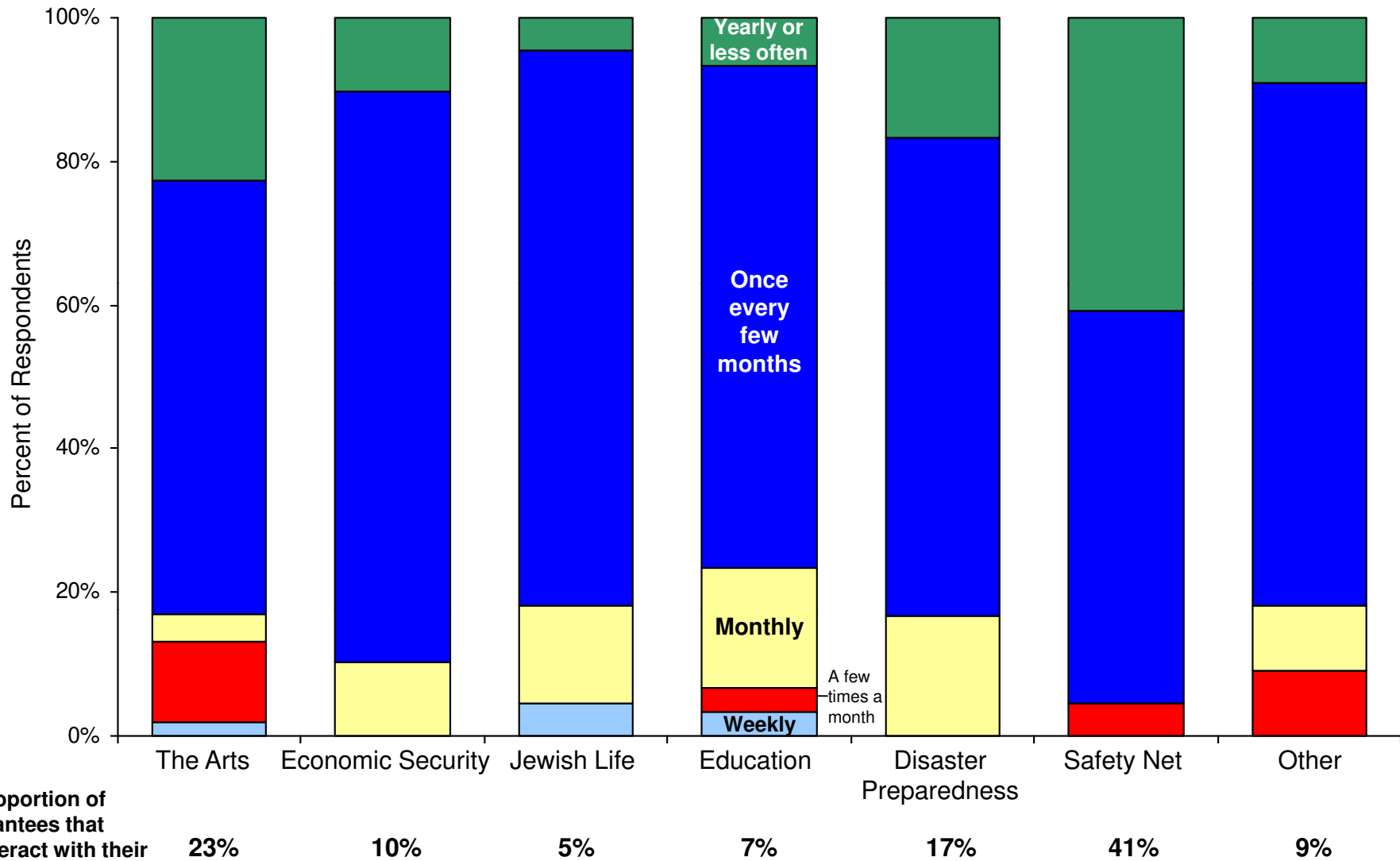
19%

27%

1: The proportion shown for "Average of all Funders" and "Average of Comparative Cohort Foundations" is a median. **CONFIDENTIAL** | © The Center for Effective Philanthropy | 10/2/2012

Frequency of Interactions (2)

Frequency of Grantee Contact with Program Officer During Grant



V. Funder-Grantee Relationships

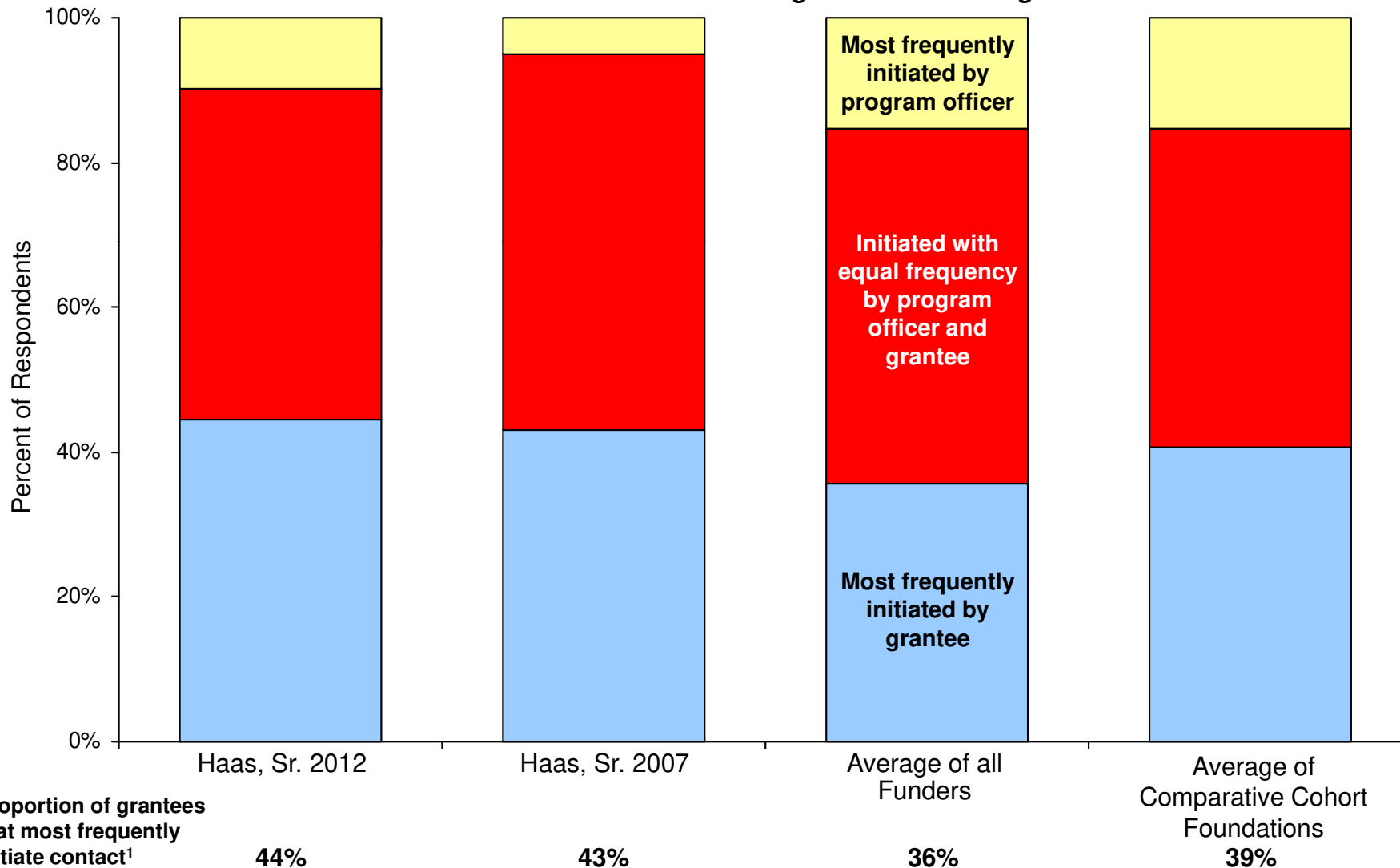
Proportion of grantees that interact with their PO yearly or less often

Initiation of Interactions (1)

The proportion of Haas, Sr. grantees that report that they most frequently initiate interactions with the Fund is:

- larger than that of 78 percent of funders
- larger than that of 75 percent of comparative cohort funders in the cohort

Initiation of Grantee Contact with Program Officer During Grant



Proportion of grantees that most frequently initiate contact¹

44%

43%

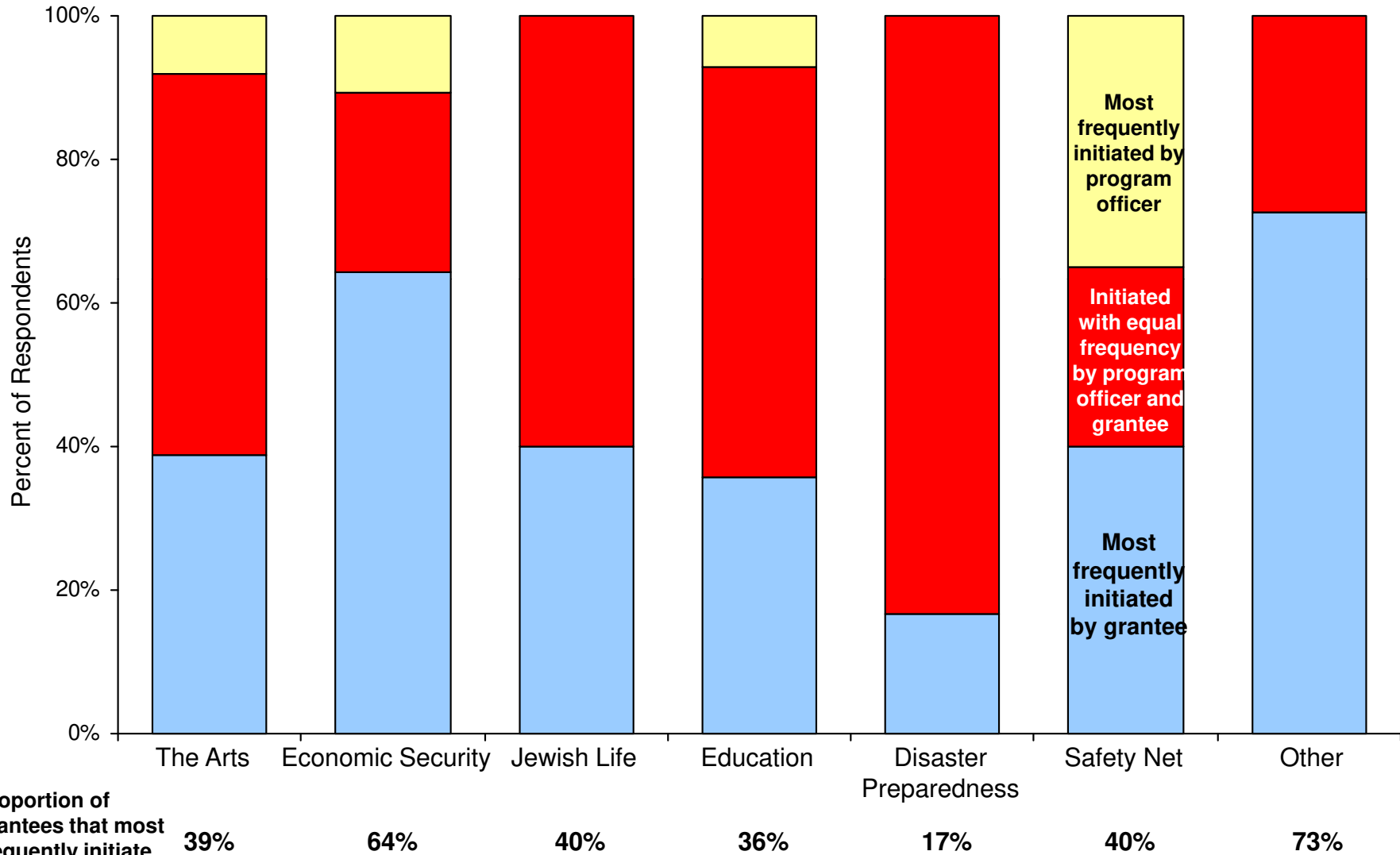
36%

39%

¹: The proportion shown for "Average of all Funders" and "Average of Comparative Cohort Foundations" is a median.

Initiation of Interactions (2)

Initiation of Grantee Contact with Program Officer During Grant

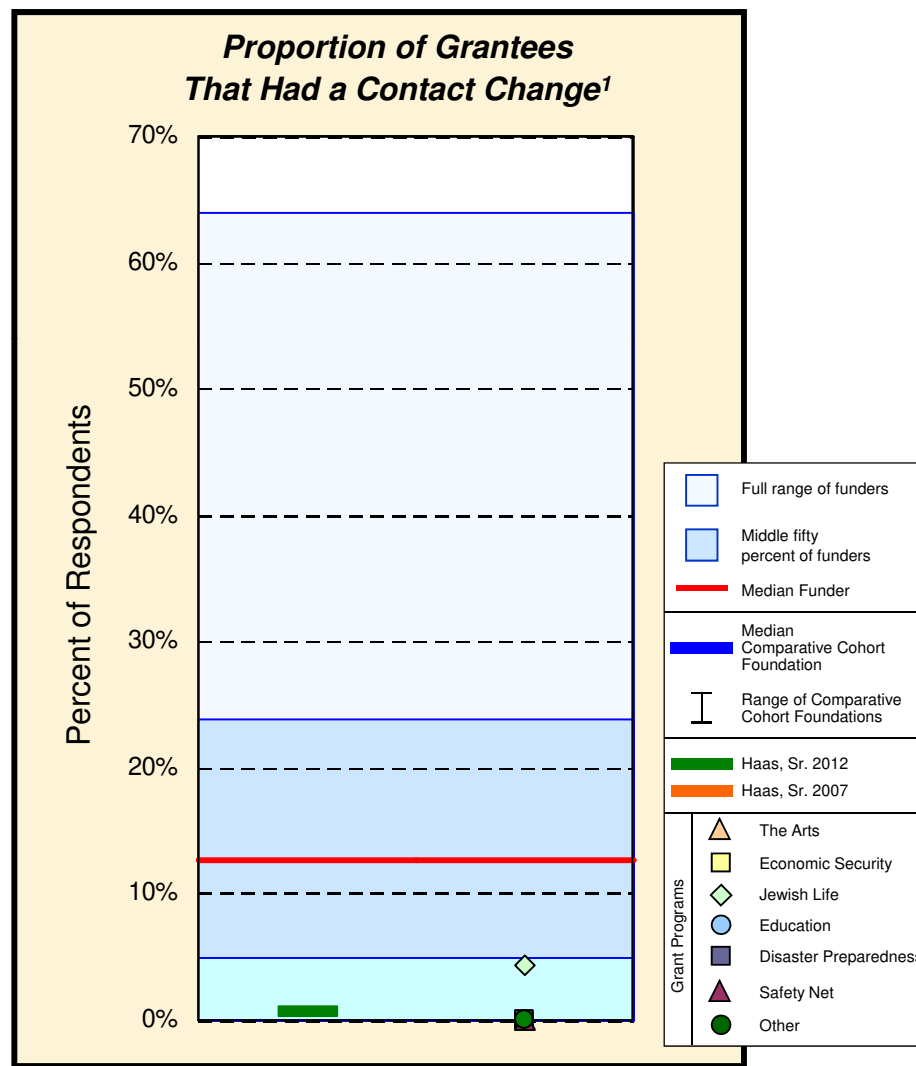


Proportion of grantees that most frequently initiate contact

Proportion of Grantees That Had a Change in Primary Contact

The proportion of Haas, Sr. grantees who had a change in their primary contact in the last six months is:

- smaller than that of 96 percent of funders

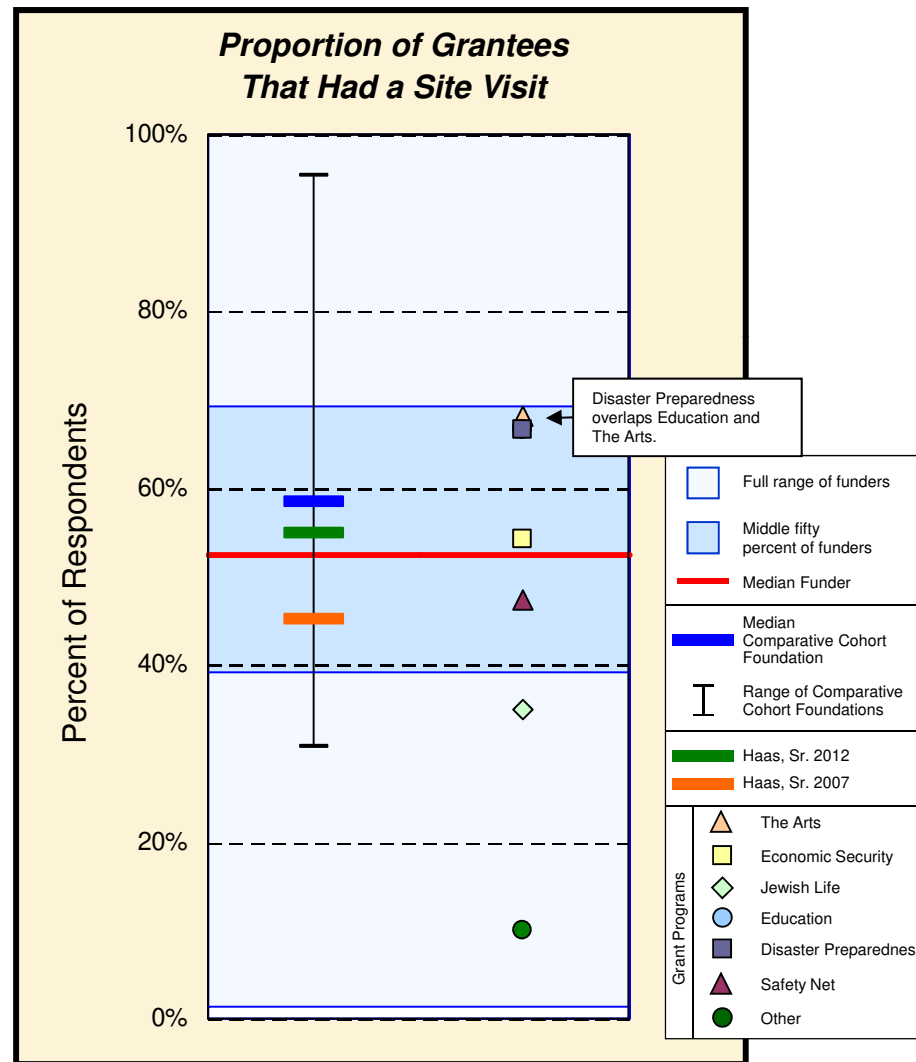


Note: Haas, Sr. 2007 data and comparative cohort funder data not available due to changes to the survey instrument.
 1: Represents data from 116 funders.

Proportion of Grantees That Had a Site Visit

The proportion of Haas, Sr. grantees receiving a site visit during the course of the grant is:

- larger than that of 54 percent of funders
- smaller than that of 58 percent of comparative cohort funders in the cohort



Haas, Sr. Analysis – Variation by Site Visit

Haas, Sr. grantees rate the Fund differently based on whether they had a site visit from the Fund.

Grantees who report receiving a site visit rate the Fund significantly higher than do other grantees on:

- ♦ Impact on and understanding of grantees' fields
- ♦ Impact on and understanding of grantees' organizations
- ♦ Responsiveness of Fund staff
- ♦ Fairness of treatment from the Fund
- ♦ Clarity of the Fund's goals

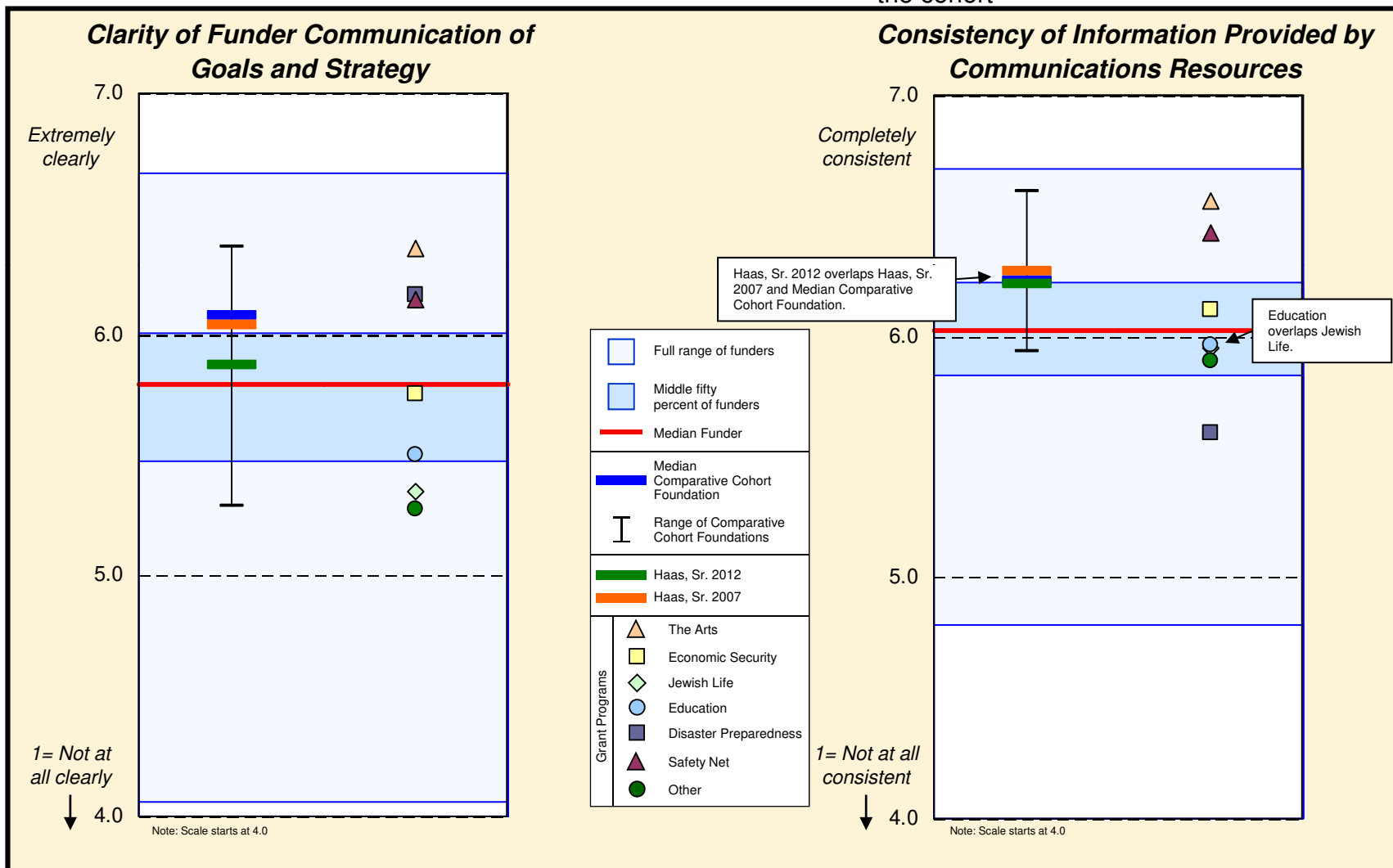
Communications Measures

On clarity of the Fund's communication of its goals and strategy, Haas, Sr. is rated:

- above 59 percent of funders
- below 62 percent of comparative cohort funders in the cohort

On consistency of the Fund's communications resources, both personal and written, Haas, Sr. is rated:

- above 79 percent of funders
- above 58 percent of comparative cohort funders in the cohort



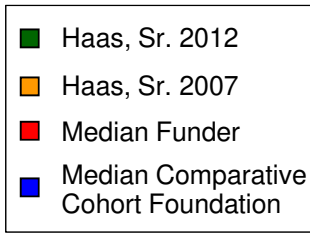
Note: In the right-hand chart, this question includes a "used one or no resources" response option; 6 percent of Haas, Sr. 2012 respondents indicated they had used one or no resources, compared to 4 percent at the median funder, 0 percent of Haas, Sr. 2007 respondents, and 3 percent of respondents at the median comparative cohort funder.

Communications Comments

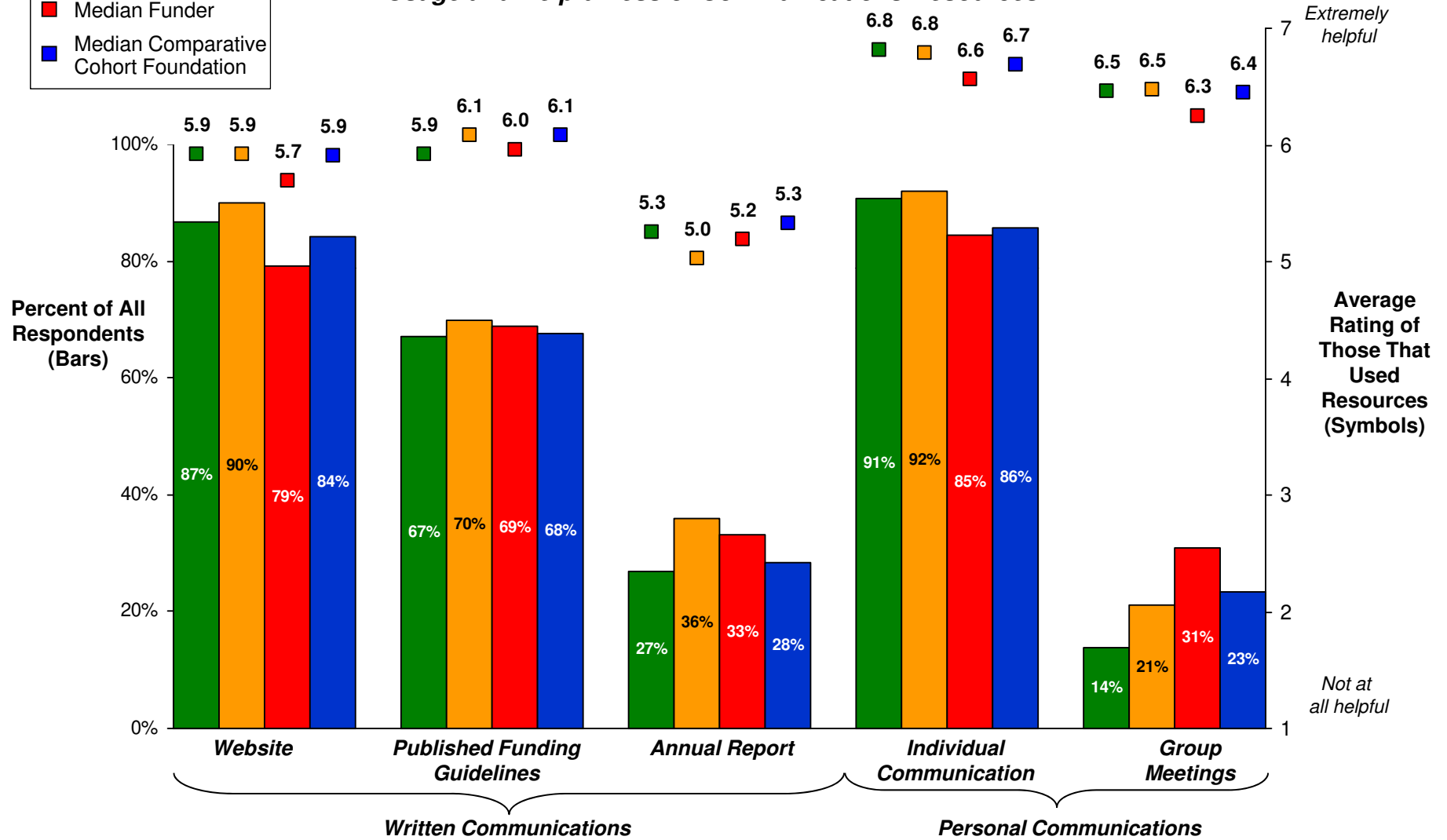
Selected Grantee Comments

- ♦ *“[Our organization] would appreciate some more indication of what Fund would most like to see us focus on.”*
- ♦ *“We are always impressed with the thoroughness and clarity of the Fund's processes and communications.”*
- ♦ *“There has at times been confusion about basic paperwork and communication regarding payment, etc., separate and apart from program expectations.”*
- ♦ *“[Our] Program officer often seems evasive about the funding process and portfolio goals.”*

Communications Resources (1)



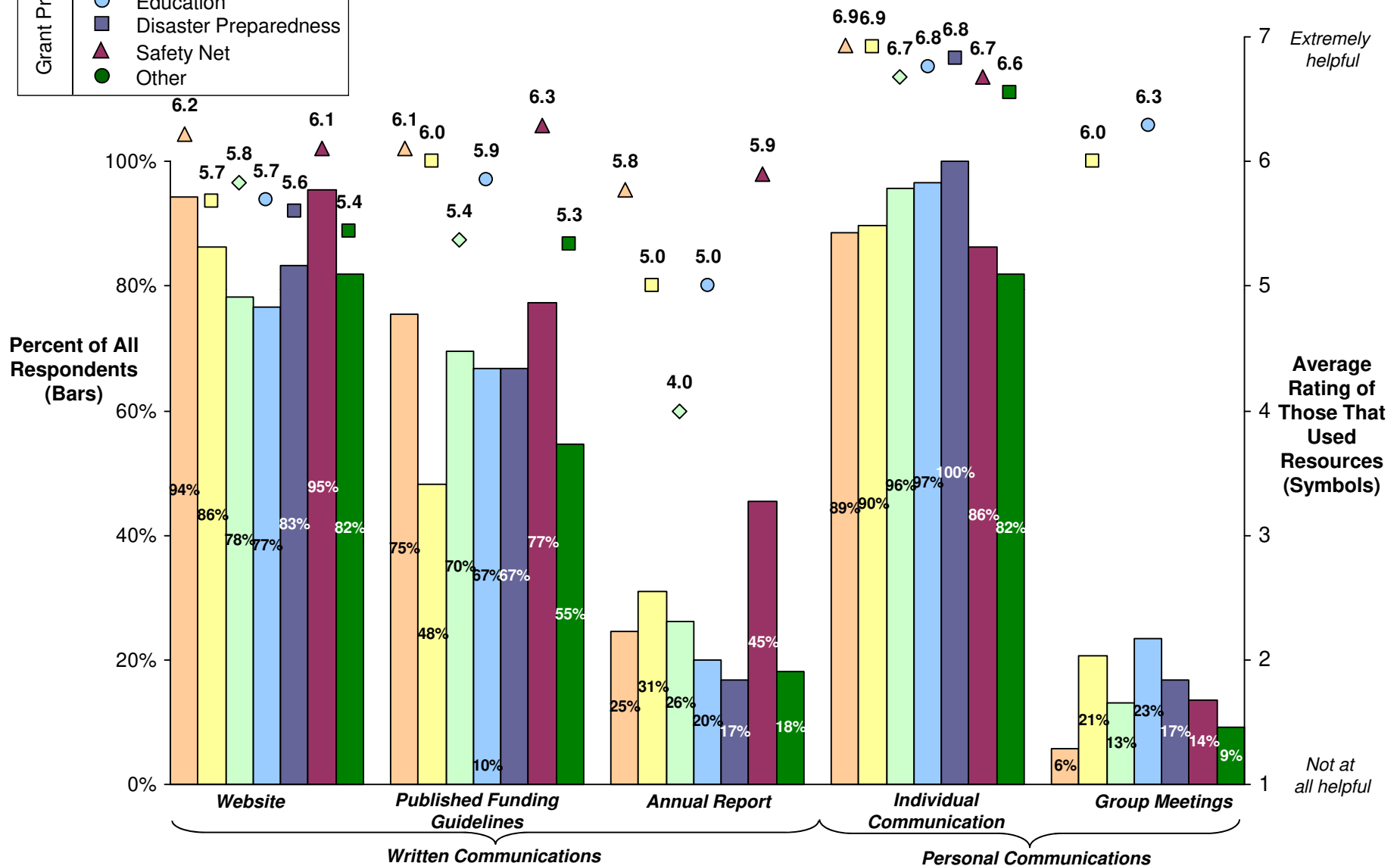
Usage and Helpfulness of Communications Resources



Communications Resources (2)

Grant Programs	Symbol
The Arts	Orange Triangle
Economic Security	Yellow Square
Jewish Life	Light Green Diamond
Education	Light Blue Circle
Disaster Preparedness	Dark Blue Square
Safety Net	Maroon Triangle
Other	Dark Green Circle

Usage and Helpfulness of Communications Resources



Note: The Arts, Jewish Life, Disaster Preparedness, Safety Net, and Other helpfulness ratings not shown when fewer than five responses to the question were received.

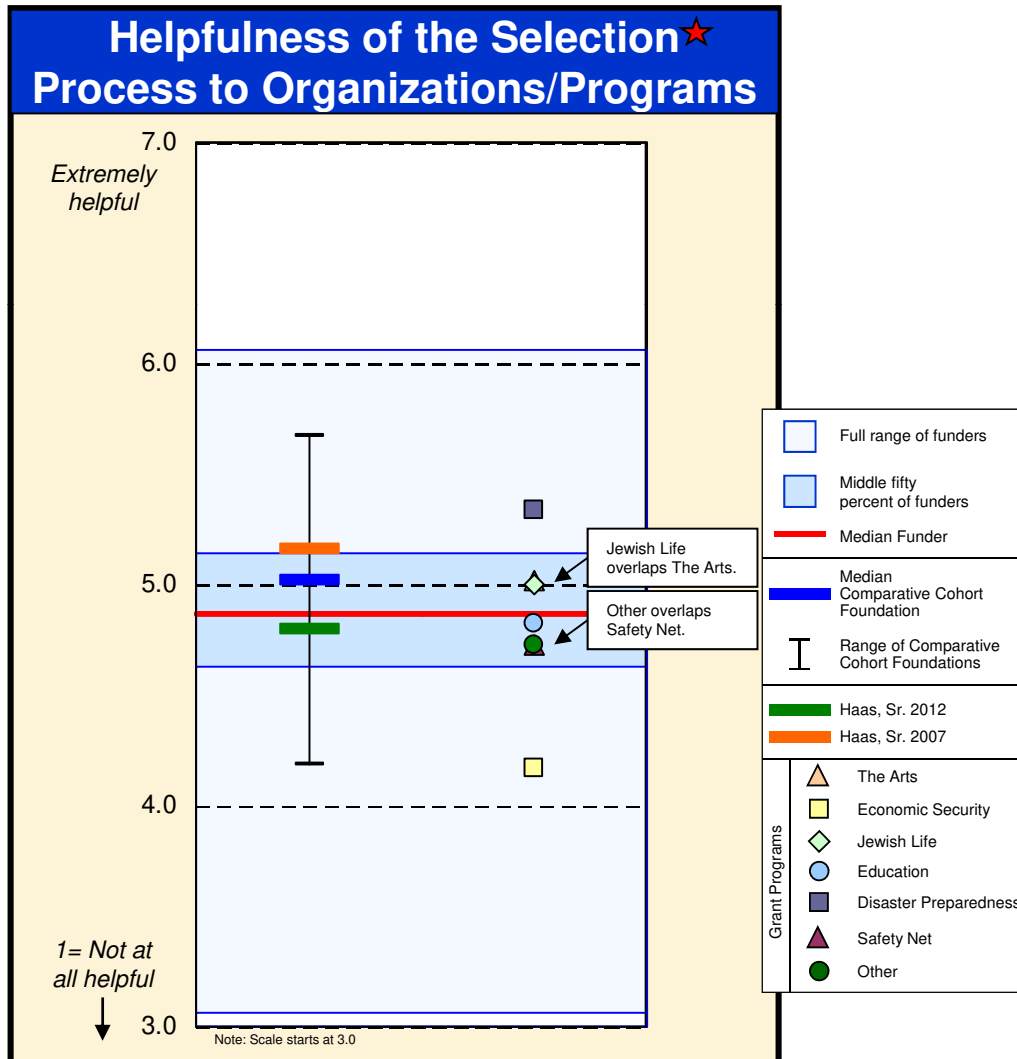
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Helpfulness of Selection Process

On helpfulness of the Fund's selection process in strengthening funded organizations/programs, Haas, Sr. is rated:

- below 59 percent of funders
- below 83 percent of comparative cohort funders in the cohort



Selected Grantee Comments

- ♦ *“Our program officer has been extremely helpful in providing advice to make our proposal stronger, and clarifying the goals of the Fund. The processing time between application and official notice of receipt was a bit longer than expected, which was not ideal, but otherwise the Fund has been a exceptional partner.”*
- ♦ *“I would give the Haas Fund a very high rating in terms of clarity of the proposal process, availability and willingness of staff to help us through the process. At all times, staff was very upfront about the granting process - encouraging but also realistic. We felt supported and encouraged.”*
- ♦ *“The Fund's proposal process is thorough and thoughtful. It has enabled us to think more broadly and deeply about our work and to articulate our value in ways that speak to other funders as well.”*
- ♦ *“The process is very clearly communicated. The PDF forms are user-friendly. The proposal requirements are clear and straight-forward. We appreciate the accessibility and collegiality of the program officers.”*

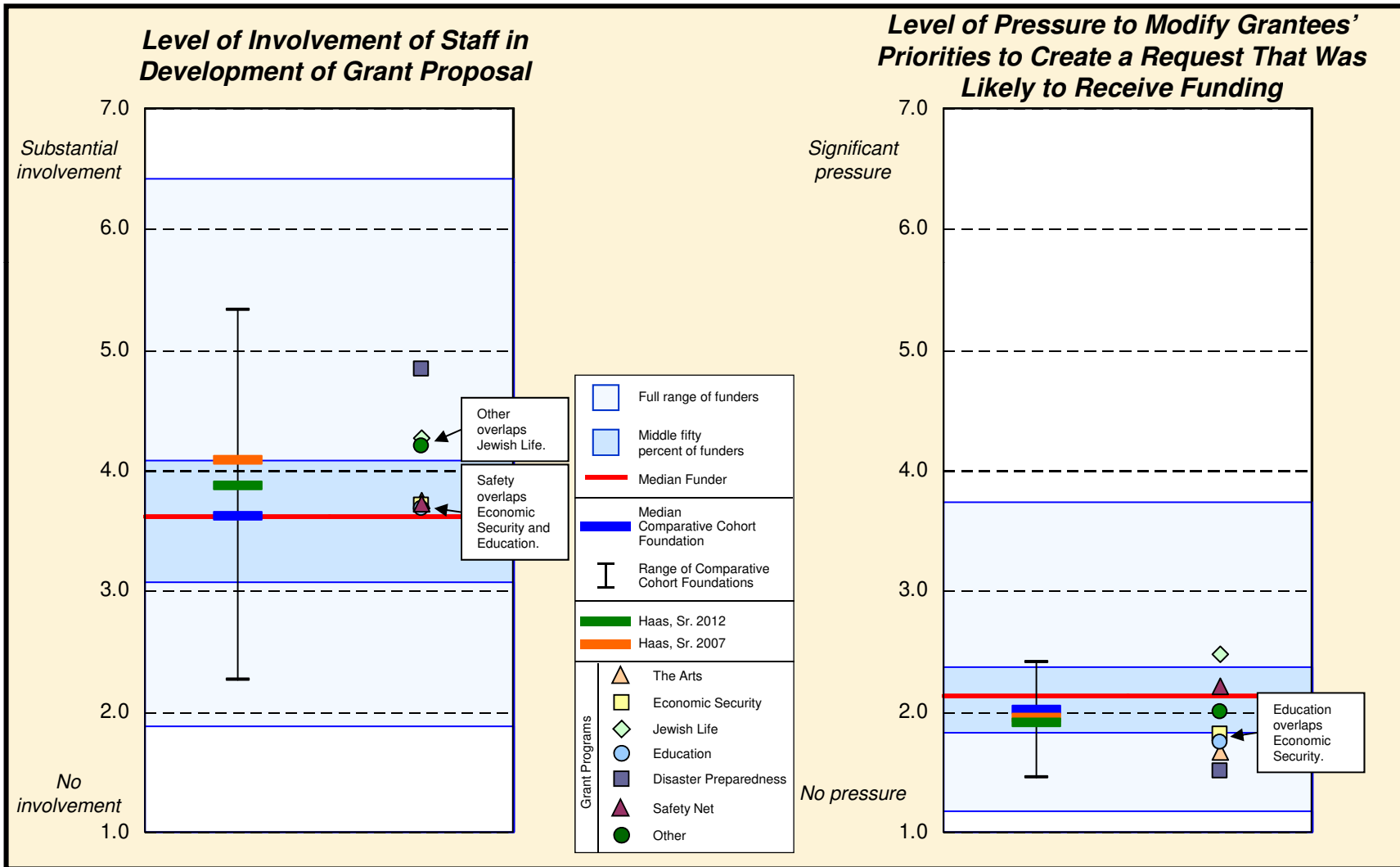
Funder Involvement and Pressure in Selection Process

On the level of involvement in the development of grantees' proposals, Haas, Sr. is rated:

- above 65 percent of funders
- above 67 percent of comparative cohort 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, Haas, Sr. is rated:

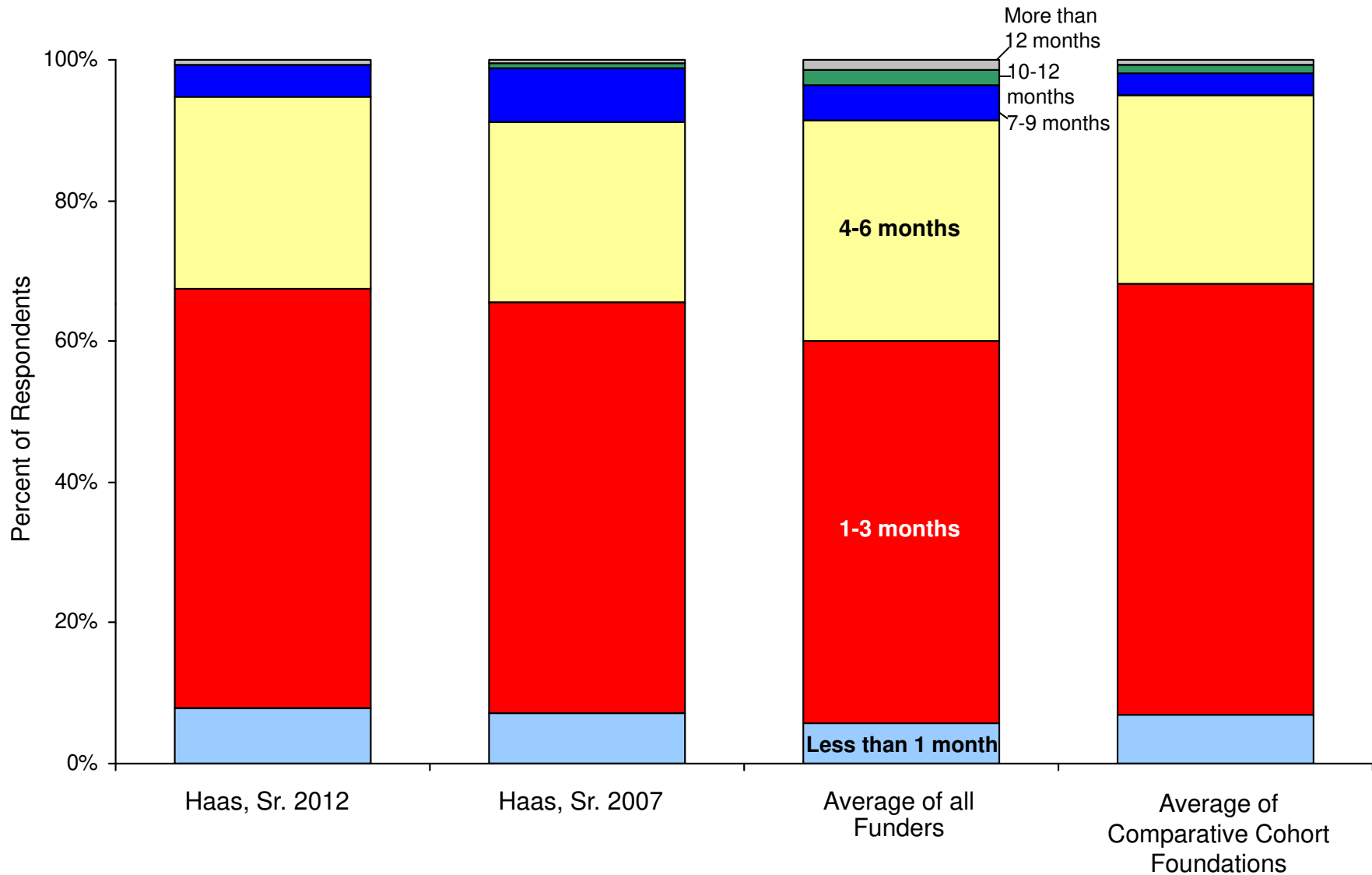
- below 68 percent of funders
- below 58 percent of comparative cohort funders in the cohort



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 Haas, Sr. 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 Haas, Sr. 2007 respondents, and 96 percent of respondents at the median comparative cohort funder.

Time Between Submission and Clear Commitment (1)

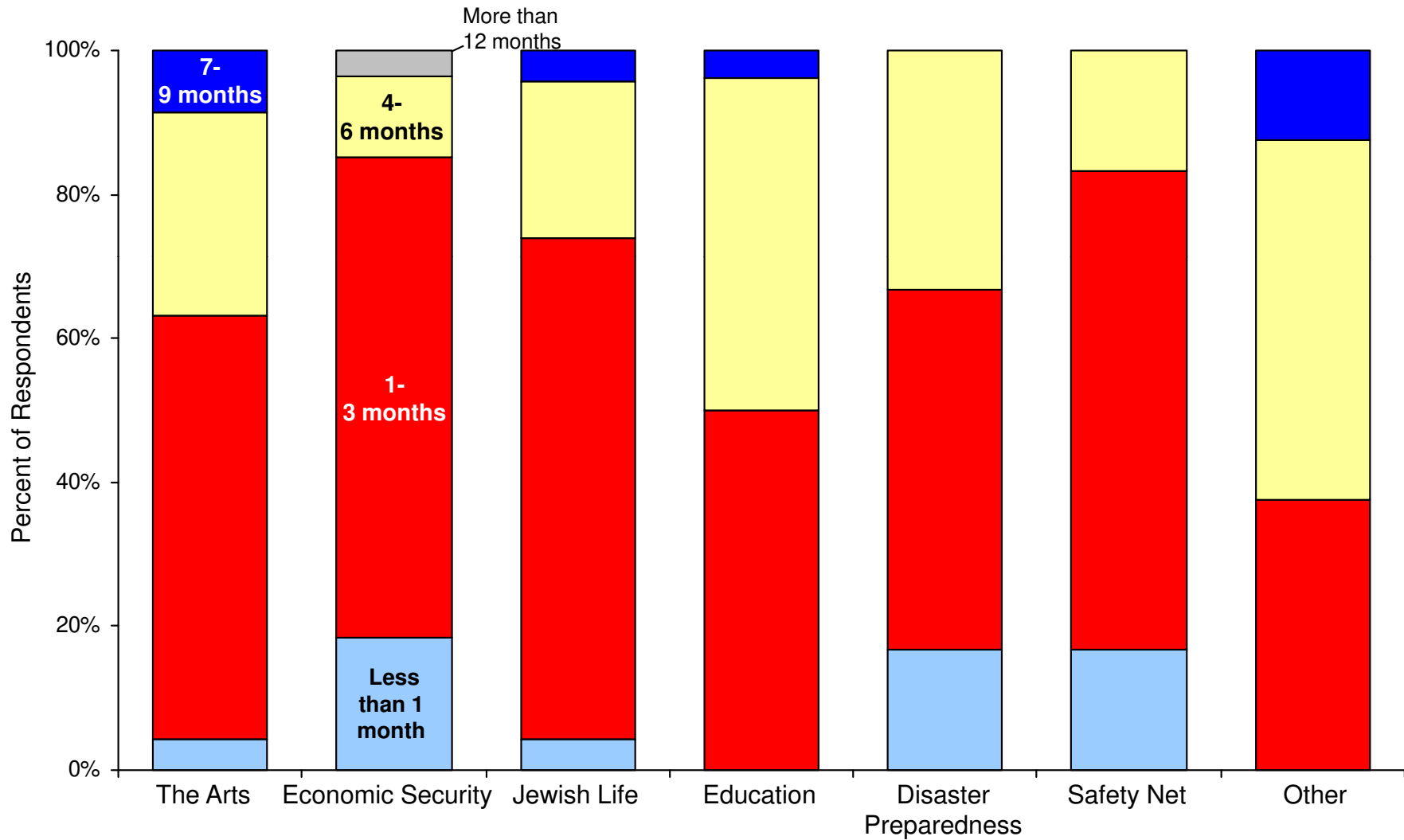
Time Elapsed Between Proposal Submission and Clear Commitment



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 Haas, Sr. 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 Haas, Sr. 2007 respondents, and 96 percent of respondents at the median comparative cohort funder. **CONFIDENTIAL** | © The Center for Effective Philanthropy | 10/2/2012

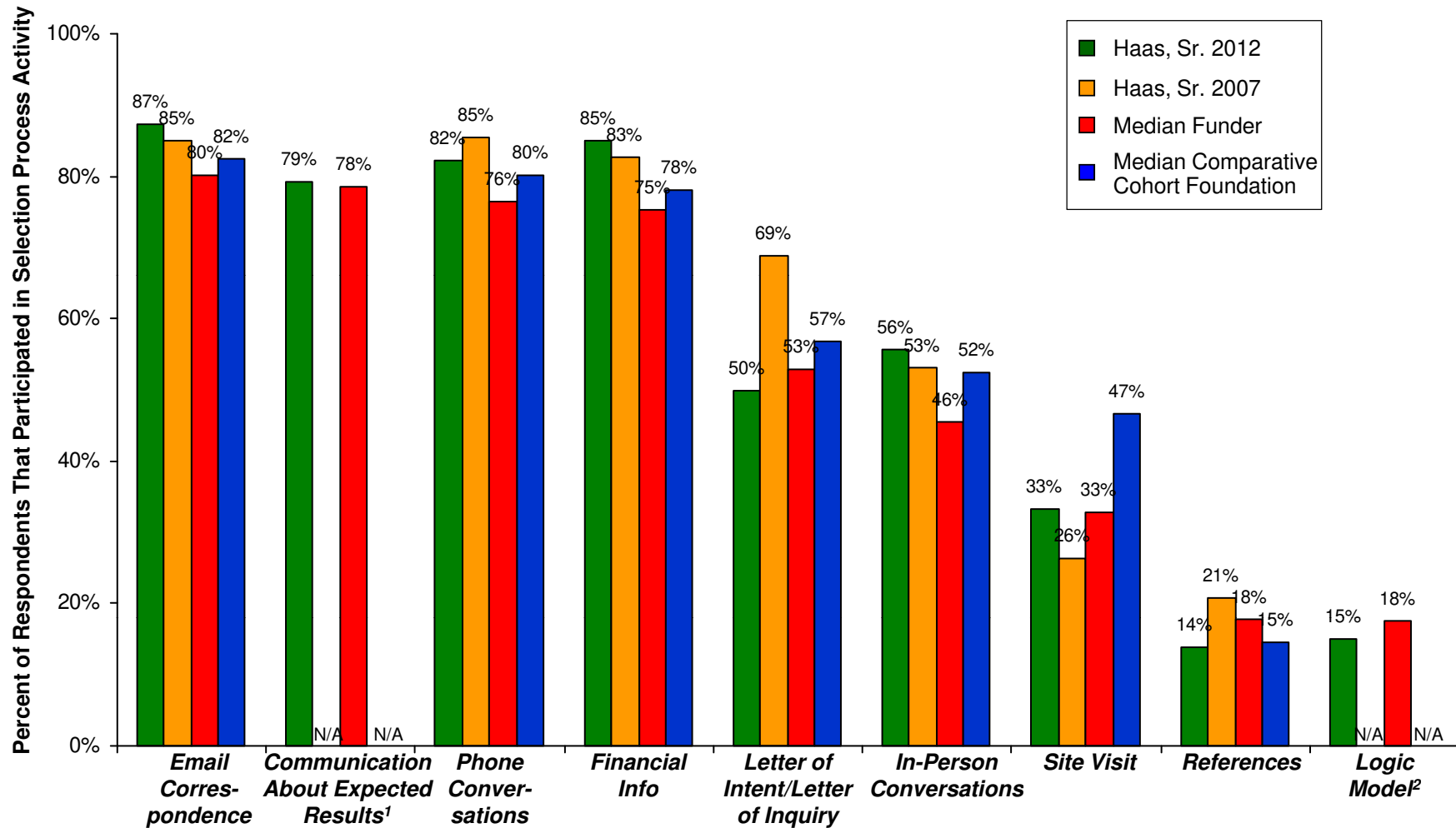
Time Between Submission and Clear Commitment (2)

Time Elapsed Between Proposal Submission and Clear Commitment



Selection Process Activities (1)

Selection Process Activities

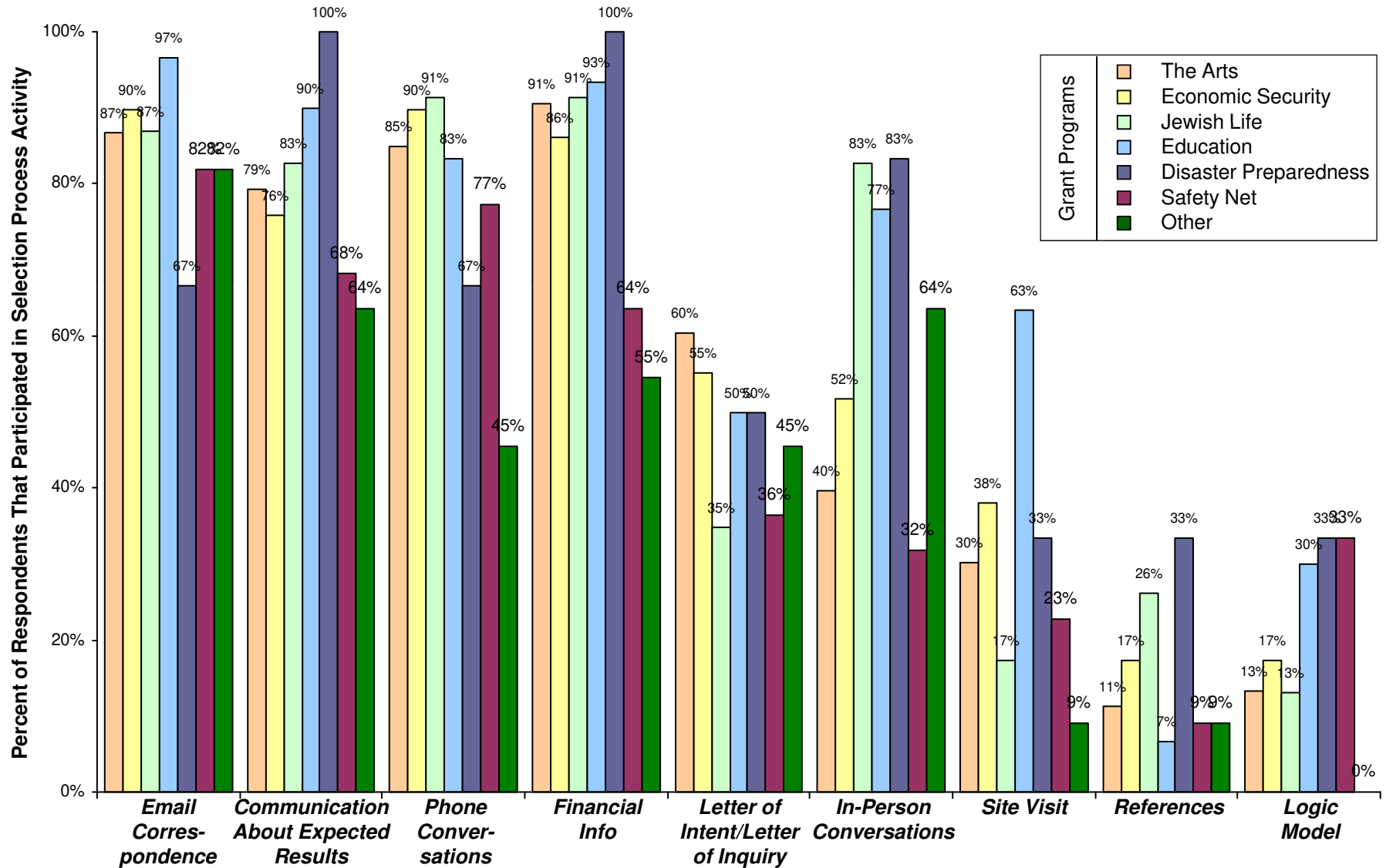


Note: Haas, Sr. 2007 data on "Communication about expected results" and "Logic model" and median comparative cohort data on "Communication about expected results" and "Logic model" not available due to changes to the survey instrument.

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

Selection Process Activities (2)

Selection Process Activities

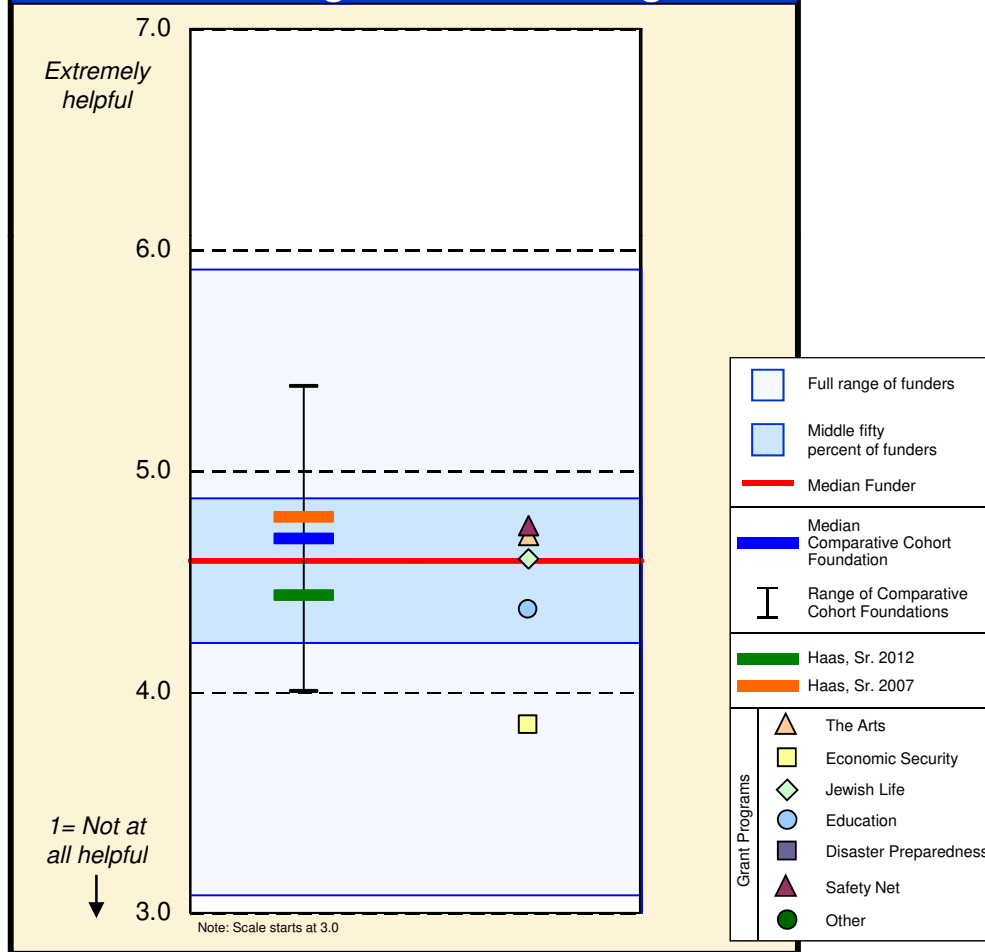


Helpfulness of Reporting and Evaluation Processes

On helpfulness of the Fund's reporting/evaluation process in strengthening funded organizations/programs, Haas, Sr. is rated:

- below 62 percent of funders
- below 75 percent of comparative cohort funders in the cohort

Helpfulness of Reporting/Evaluation Process to Organizations/Programs



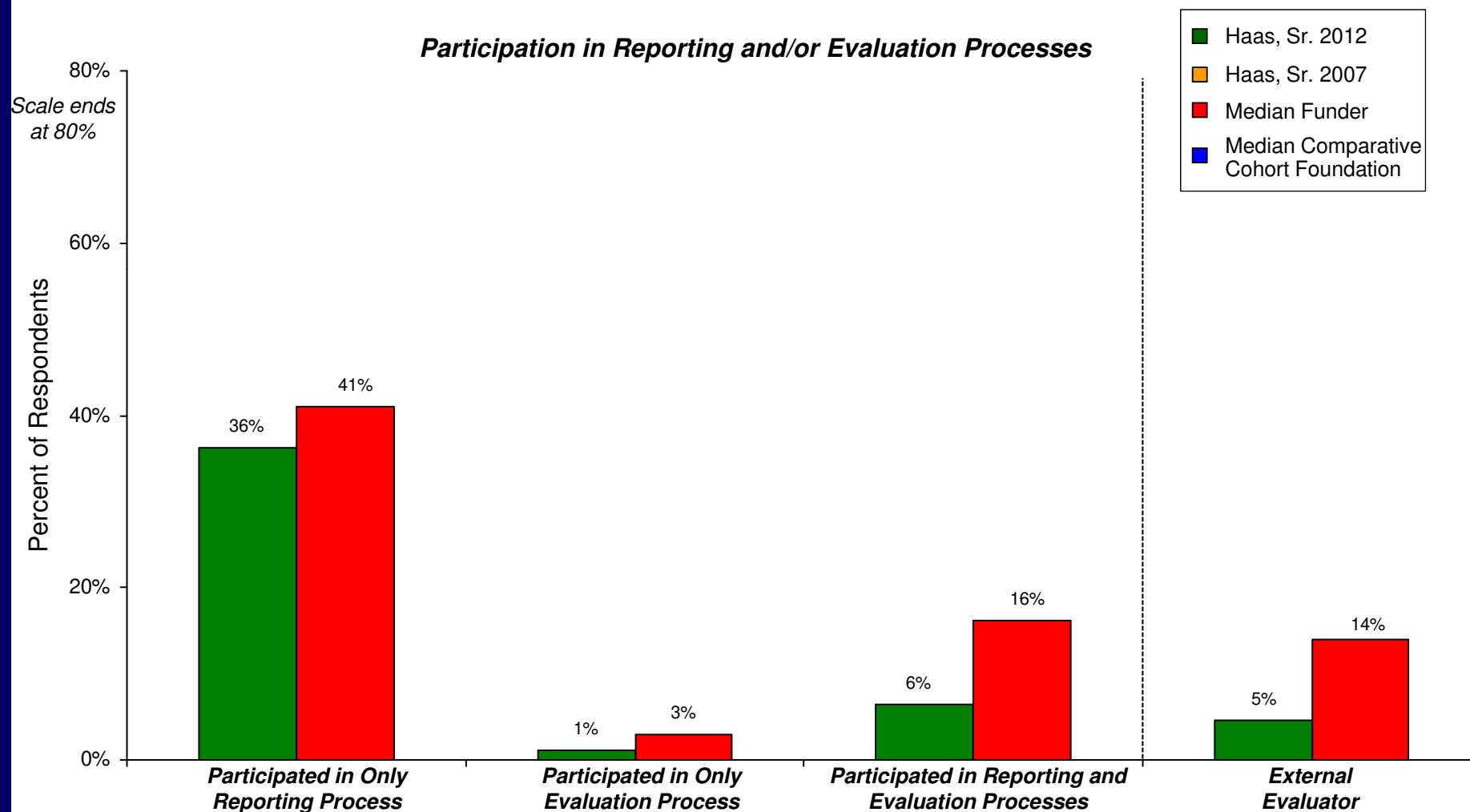
Selected Grantee Comments

- ♦ *“The grant process and reporting is very streamlined and communications have been very helpful. The program officer has been a great help.”*
- ♦ *“The Fund's processes have been extremely clear, concise and helpful. Unlike other grant programs, I've never felt like I've had to jump through unnecessary, unclear, or redundant reporting or proposal writing. They simply asked what we wanted to do, how we proposed to pay for it, how we could evaluate our success, and how the Fund could help.”*
- ♦ *“We are habitually asked the same things each time we meet with the Fund; it is clear that they have been stuck in certain scripts regarding our field for far too long.”*

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 Haas, Sr. 2012, 44 percent of grantees indicated that they had participated in a reporting or evaluation process by the time they took the survey, compared to 60 percent at the median funder, 42 percent of Haas, Sr. 2007 respondents, and 52 percent of respondents at the median comparative cohort funder. Disaster Preparedness and Other data not shown because fewer than five responses to the question were received.

Reporting and Evaluation Processes

Haas, Sr. grantees were asked if they participated in or will participate in the Fund's reporting and/or evaluation processes. Six percent of grantees participated in reporting and evaluation processes.



Note: For Haas, Sr. 2012, 56% percent of grantees reported that a reporting/evaluation process had not occurred at the time of the survey. Haas, Sr. 2007 data and comparative cohort funder data not available due to changes to the survey instrument. This chart represents data from 58 funders.

Discussion of Report or Evaluation

The proportion of Haas, Sr. grantees that reported discussing their completed reports or evaluations with Fund staff is:

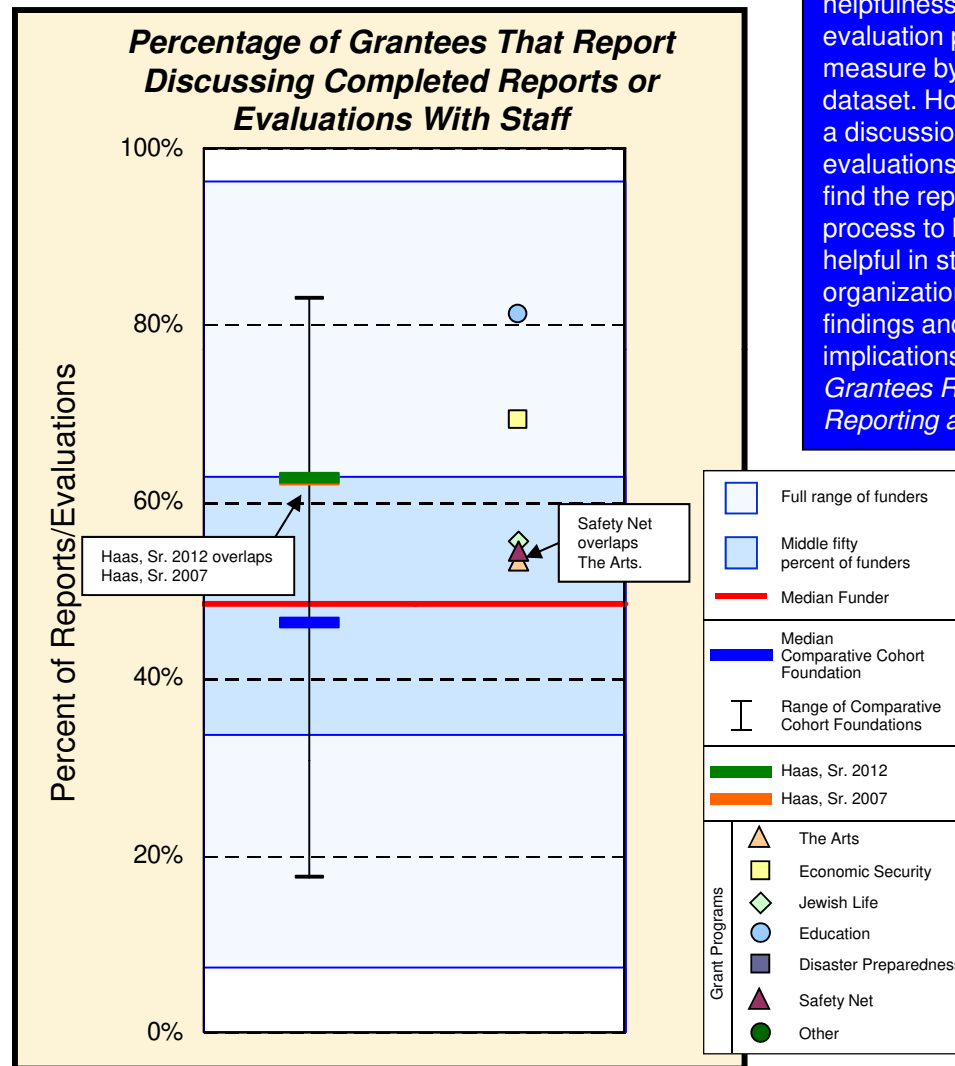
- larger than that of 75 percent of funders
- larger than that of 77 percent of comparative cohort funders in the cohort

Haas, Sr. Analysis – Variation by Discussion of Evaluations

Haas, Sr. grantees rate the Fund differently based on whether they had discussed completed reports or evaluations with staff.

Grantees who report discussing reports or evaluations rate the Fund significantly higher than do other grantees on:

- ♦ Impact on grantees' fields
- ♦ Fairness of treatment from the Fund
- ♦ Helpfulness of the evaluation process
- ♦ Helpfulness of the selection process



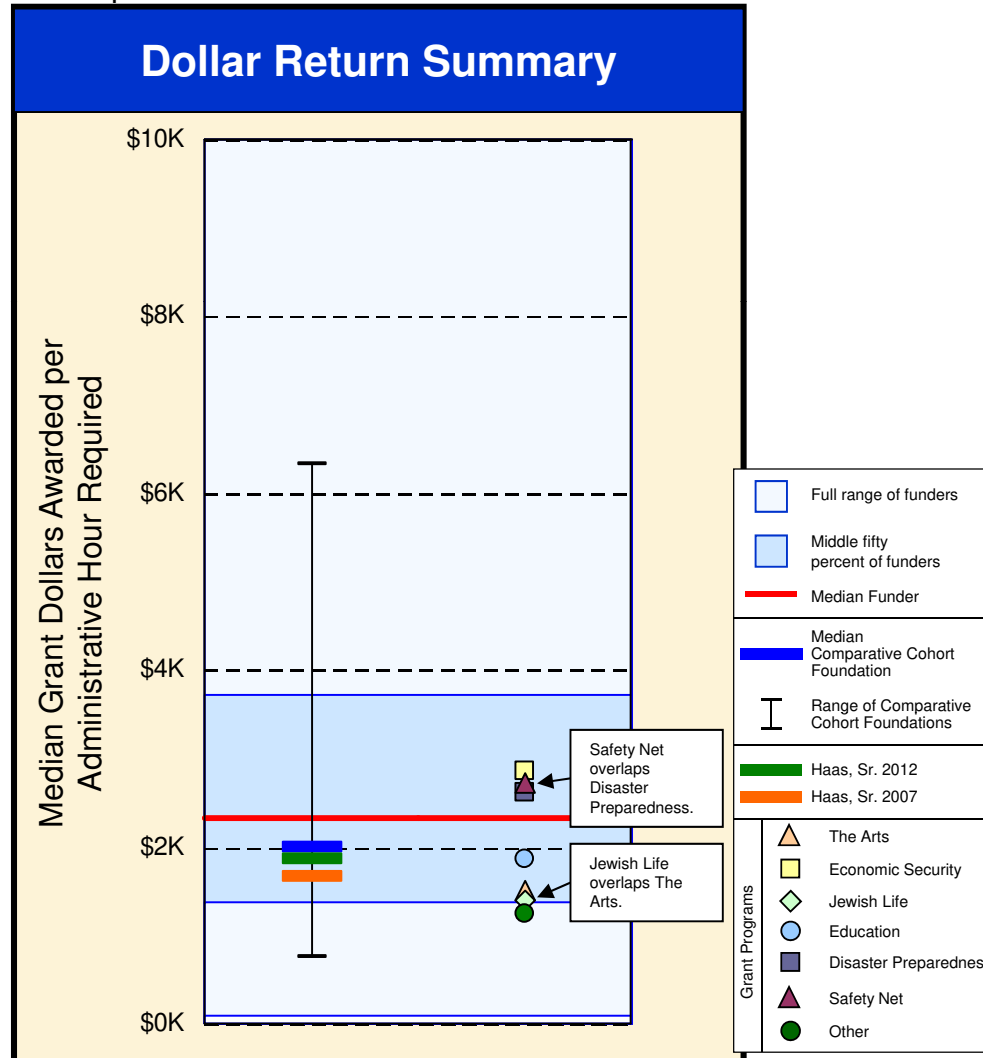
Survey-Wide Analysis Fact: The helpfulness of the reporting or evaluation process is the lowest rated measure by grantees in CEP's dataset. However, grantees who have a discussion about their reports or evaluations with their funder tend to find the reporting or evaluation process to be significantly 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 Haas, Sr. 2012, 44 percent of grantees indicated that they had participated in a reporting or evaluation process by the time they took the survey, compared to 60 percent at the median funder, 42 percent of Haas, Sr. 2007 respondents, and 52 percent of respondents at the median comparative cohort funder. Disaster Preparedness and Other data not shown because fewer than five responses to the question were received.

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 Haas, Sr. grantees is:

- less than that of 62 percent of funders
- less than that of 75 percent of comparative cohort 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.

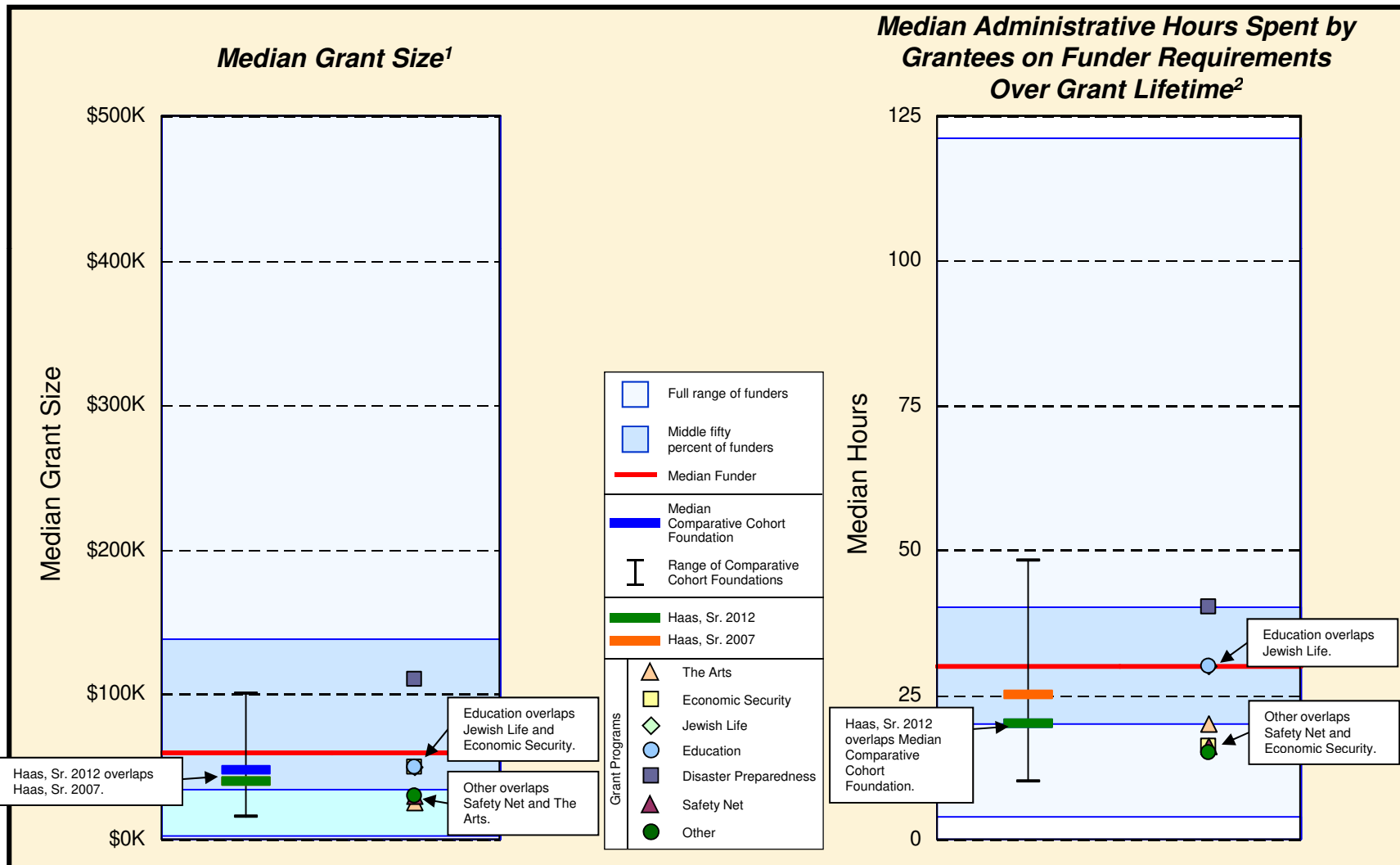
Grant Size and Administrative Time

At the median, the grant size reported by Haas, Sr. grantees is:

- smaller than that of 71 percent of funders
- smaller than that of 62 percent of comparative cohort funders in the cohort

At the median, the number of hours of administrative time spent by Haas, Sr. 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 58 percent of comparative cohort funders in the cohort



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

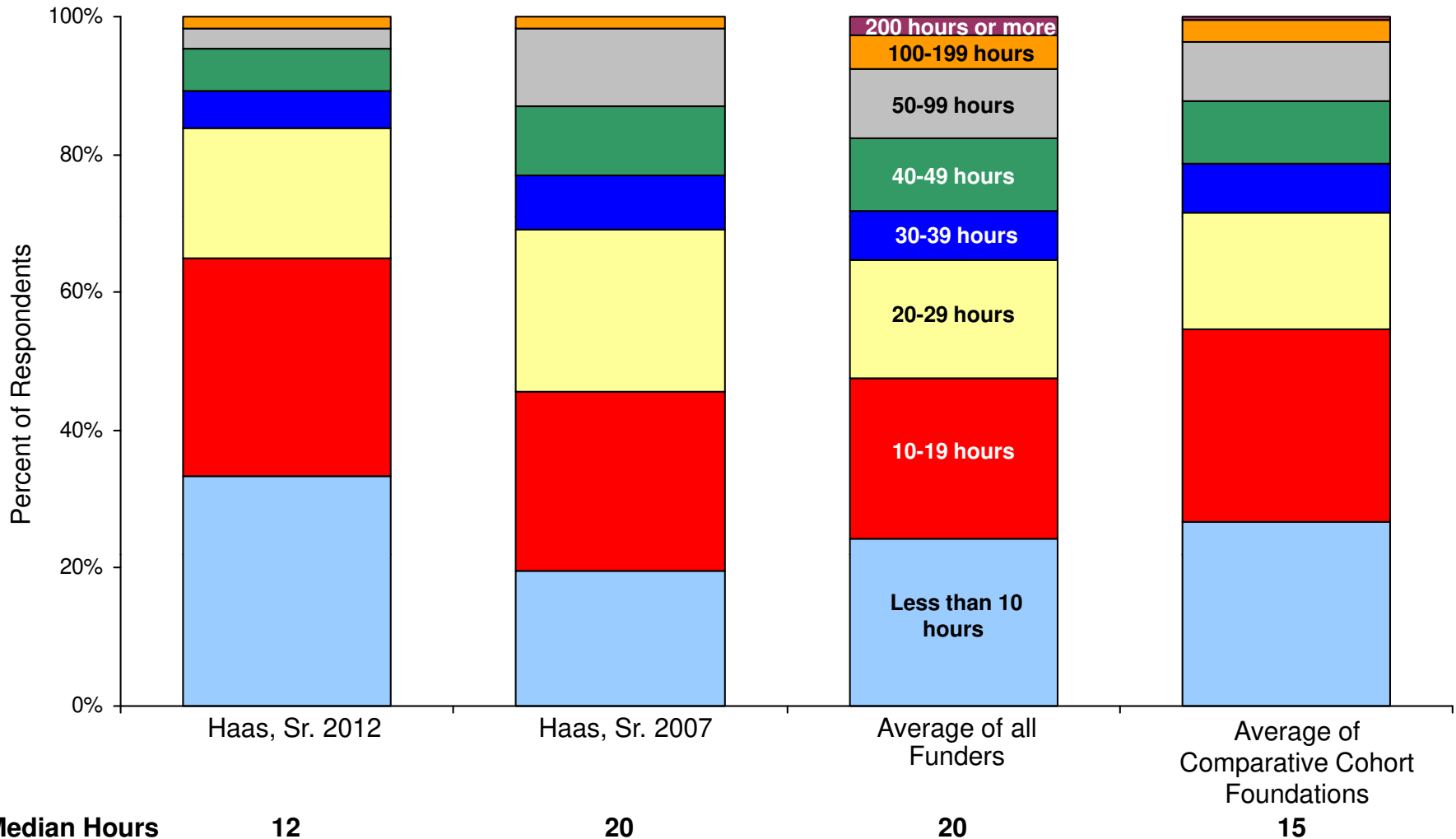
2: Chart displays total grant proposal creation, evaluation, and monitoring hours spent over the life of the grant; each of these events did not necessarily occur for each individual grantee. Chart does not show data from four funders whose median administrative hours exceed 125 hours.

Administrative Time – Proposal and Selection Process (1)

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

- less than the time spent by grantees of 79 percent of funders
- less than the time spent by grantees of 62 percent of comparative cohort funders in the cohort

Median Administrative Hours Spent by Grantees on Proposal and Selection Process



Median Hours

12

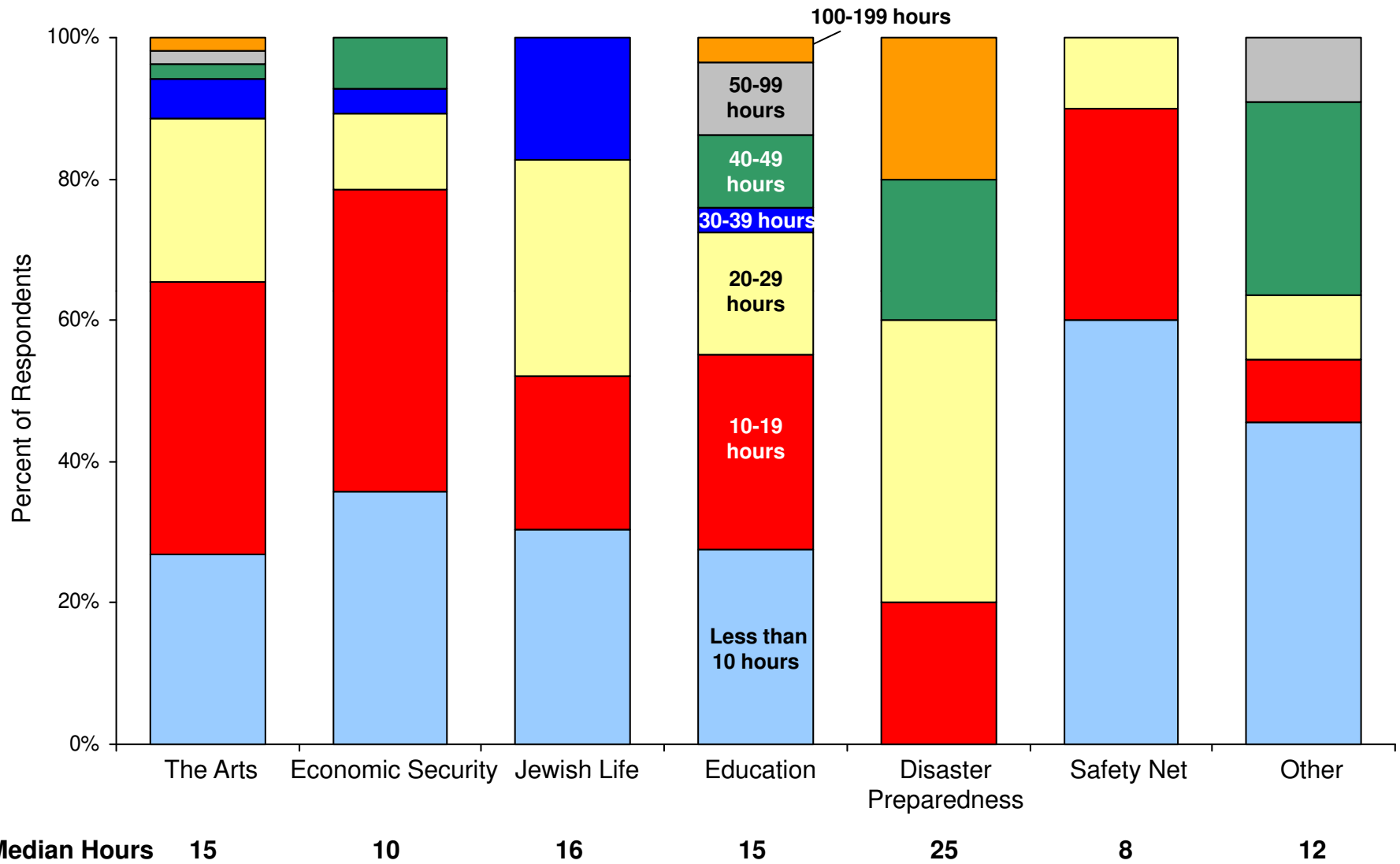
20

20

15

Administrative Time – Proposal and Selection Process (2)

Median Administrative Hours Spent by Grantees on Proposal and Selection Process

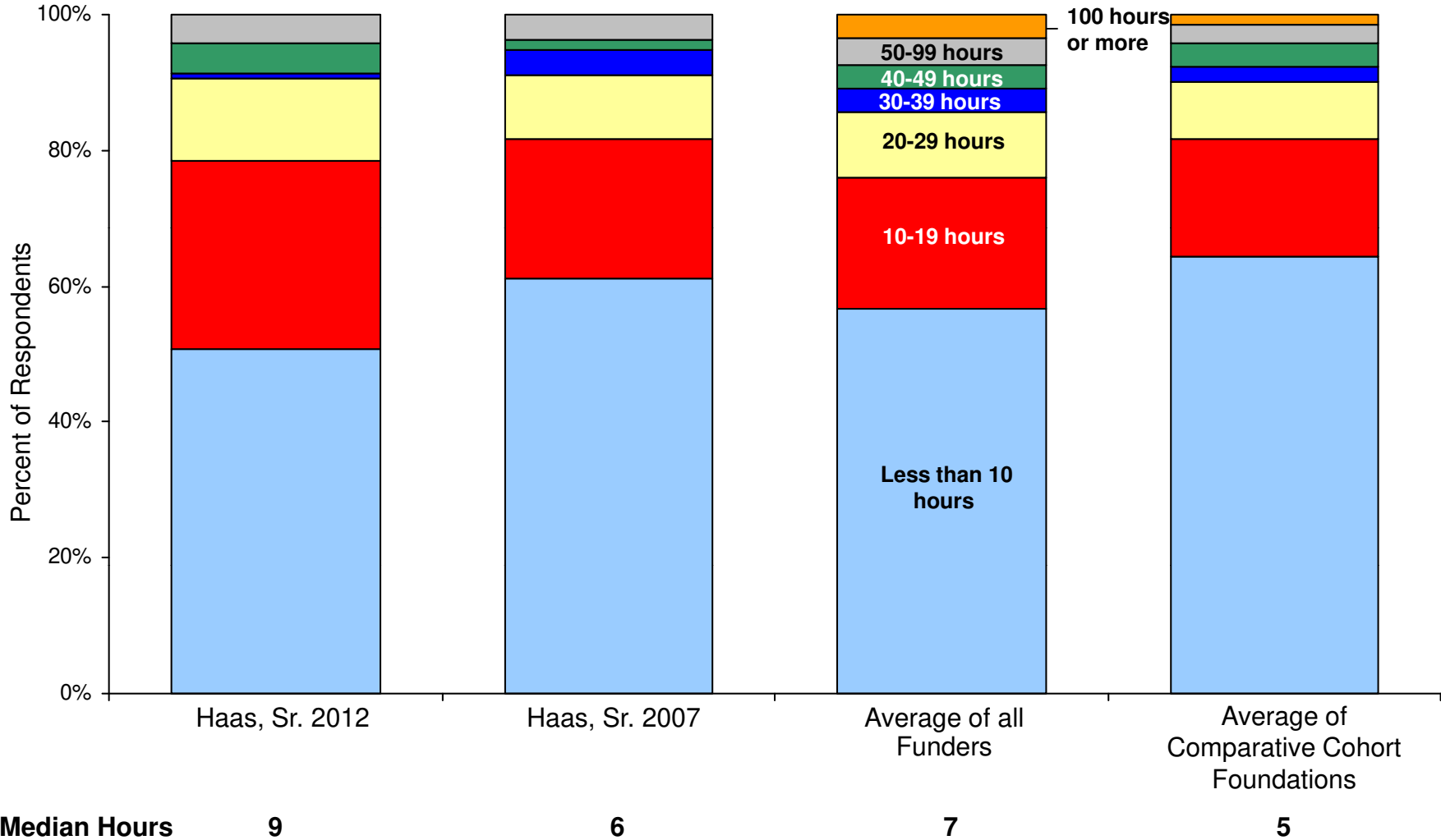


Administrative Time – Reporting and Evaluation Processes (1)

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

- greater than the time spent by grantees of 64 percent of funders
- greater than the time spent by grantees of 83 percent of comparative cohort funders in the cohort

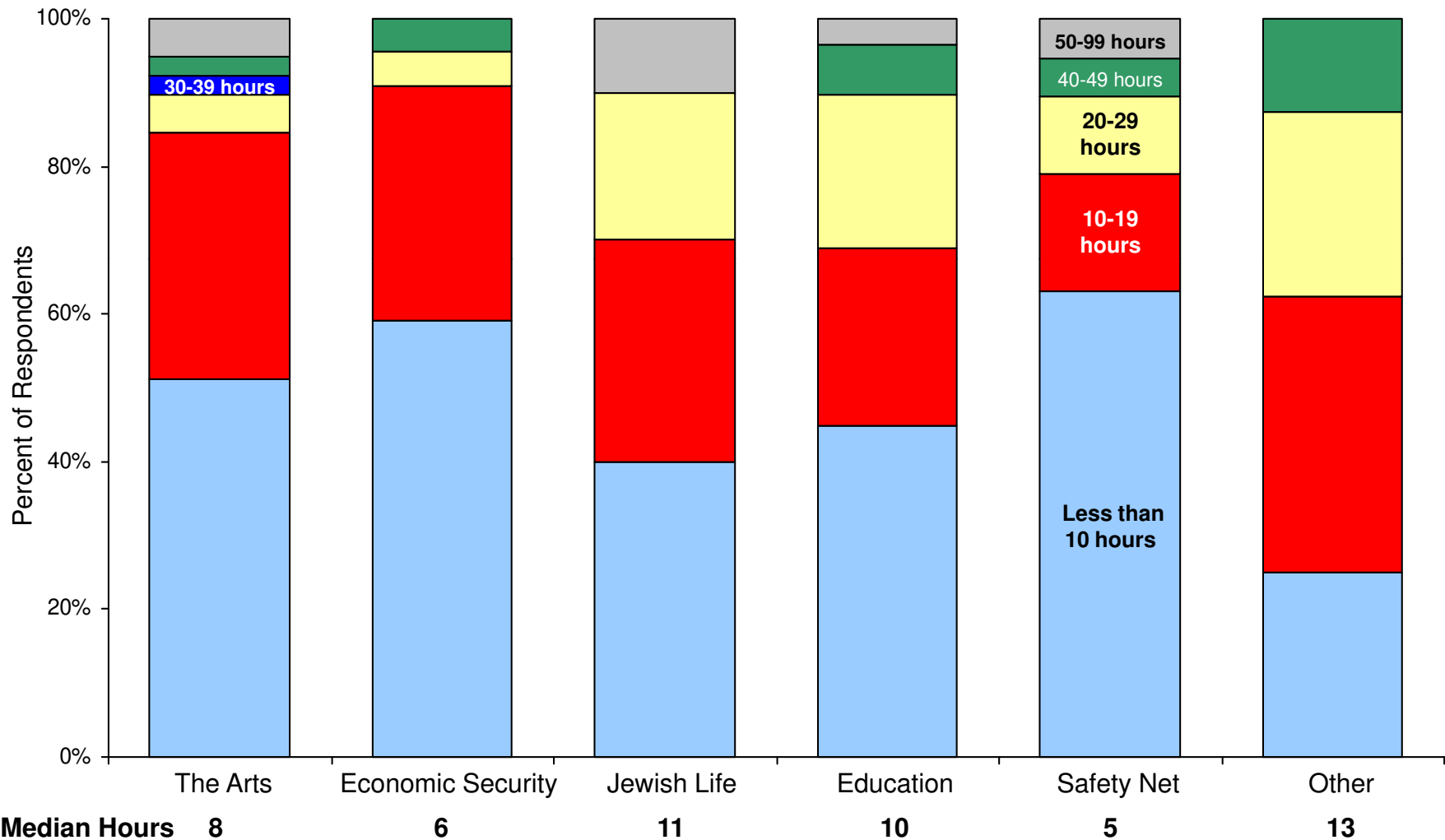
Median Administrative Hours Spent by Grantees on Monitoring, Reporting, and Evaluation Processes (Annualized)



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

Administrative Time – Reporting and Evaluation Processes (2)

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



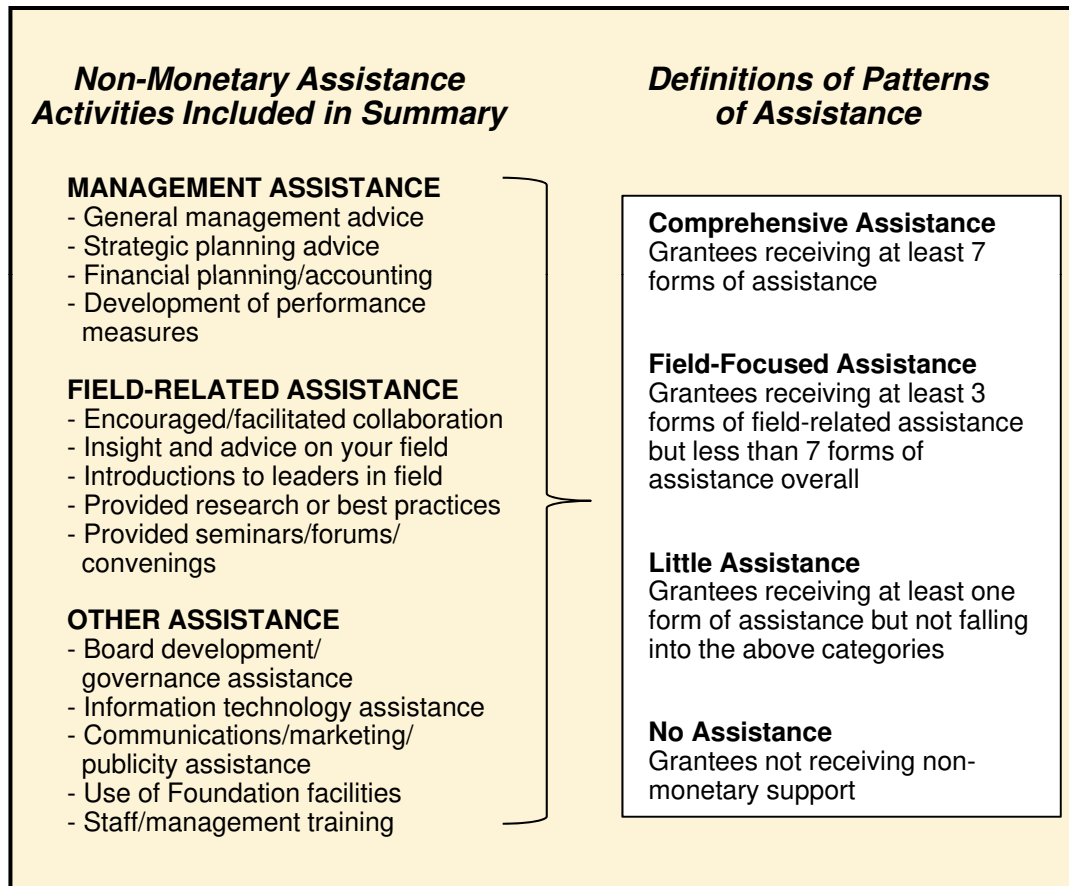
Note: "Evaluation" in the survey includes any activity considered by grantees to be part of an evaluation, and does not necessarily correspond to the Fund's definition. Disaster Preparedness data not shown because fewer than five responses to the question were received.

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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

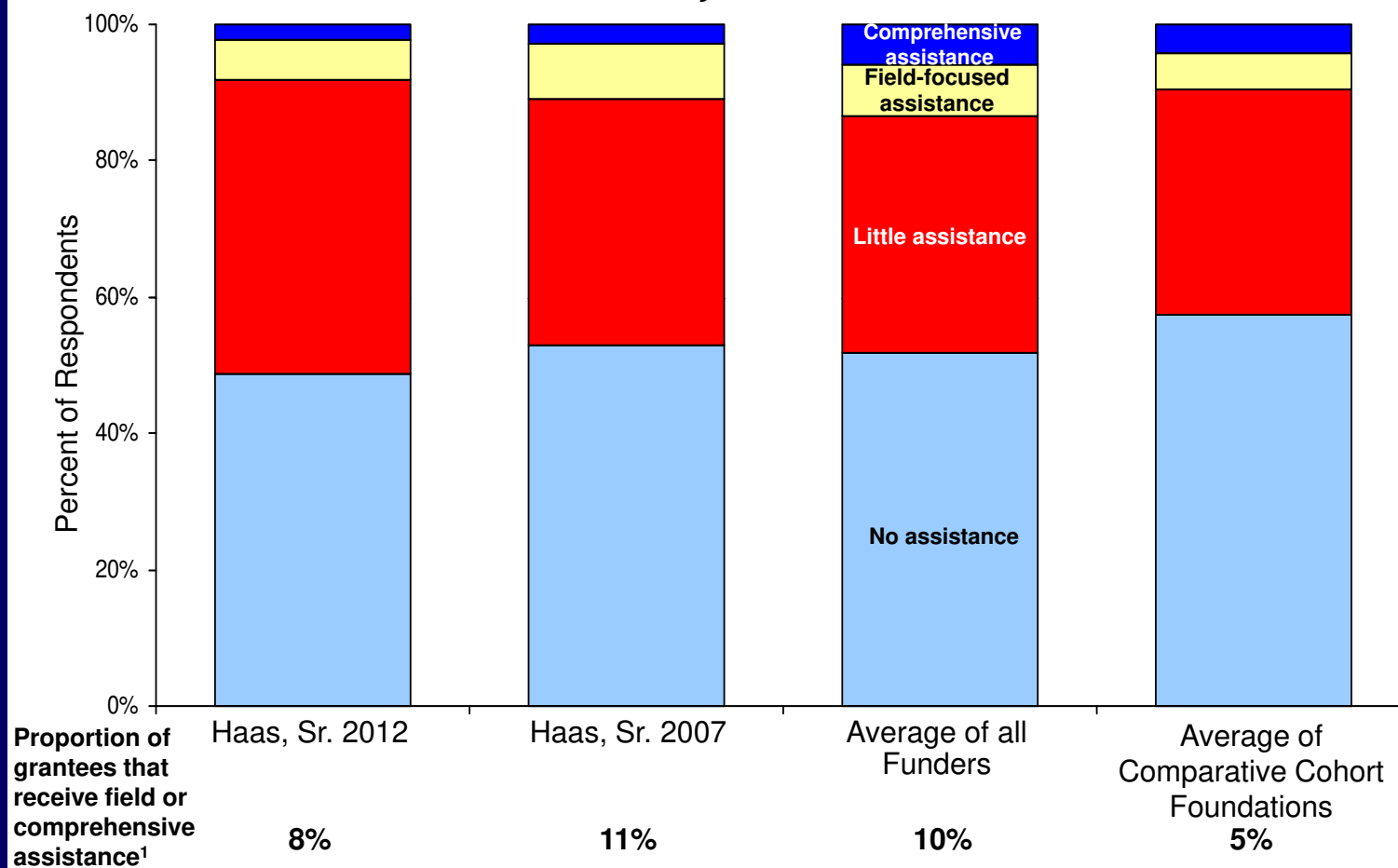
- ◆ *“Overall, the Fund is one of the best in the community to work with. It would be great if the fund could leverage its position at the center of conversations to bring grantees together for collaborative purposes.”*
- ◆ *“[Our program officer] has been a pleasure to work with. She goes above and beyond what the average foundation program officer does to help support [our organization]. She provided me with valuable insights to the communal and philanthropic world in the Bay Area, new strategic tools, and a clearer perspective of [our organization's] role in the wider SF world.”*
- ◆ *“It would be good for the Fund to ask organizations for their wisdom in how philanthropy functions, the trends we see, the needs we see and how philanthropy can help. In other words, listen to how the organizations think philanthropy ought to function.”*
- ◆ *“[Our program officer] offers not only honest and helpful feedback but she offers her own insight and scholarship of the field to help advance the quality of the work and resulting outcomes.”*

Non-Monetary Assistance Summary (2)

The proportion of Haas, Sr. grantees that report receiving comprehensive or field-focused assistance is:

- smaller than that of 58 percent of funders
- larger than that of 67 percent of comparative cohort funders in the cohort

Non-Monetary Assistance Patterns



Haas, Sr. Analysis – Variation by Pattern of Non-monetary Assistance

Haas, Sr. grantees rate the Fund differently based on the pattern of non-monetary assistance they received from the Fund.

Grantees who report receiving comprehensive or field-focused assistance rate the Fund significantly higher than do other grantees on:

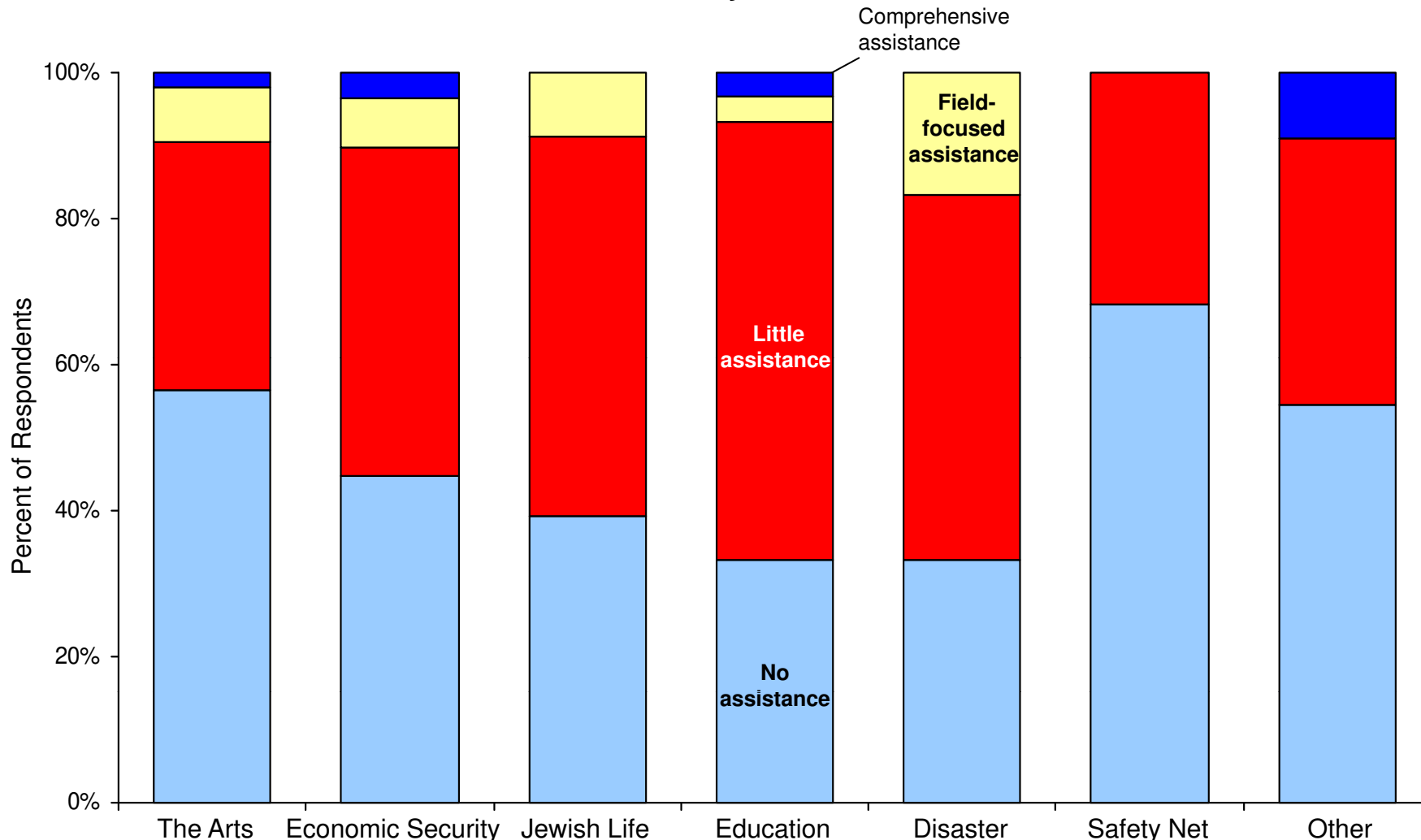
- ♦ Understanding of grantees' fields
- ♦ Understanding of and impact on grantees' organizations
- ♦ Quality of funder/grantee relationship
- ♦ Impact of funding on sustainability of grantees' work

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 Comparative Cohort Foundations" is a median.

Non-Monetary Assistance Summary (3)

Non-Monetary Assistance Patterns



Proportion of grantees that receive field or comprehensive assistance

9%

10%

9%

7%

17%

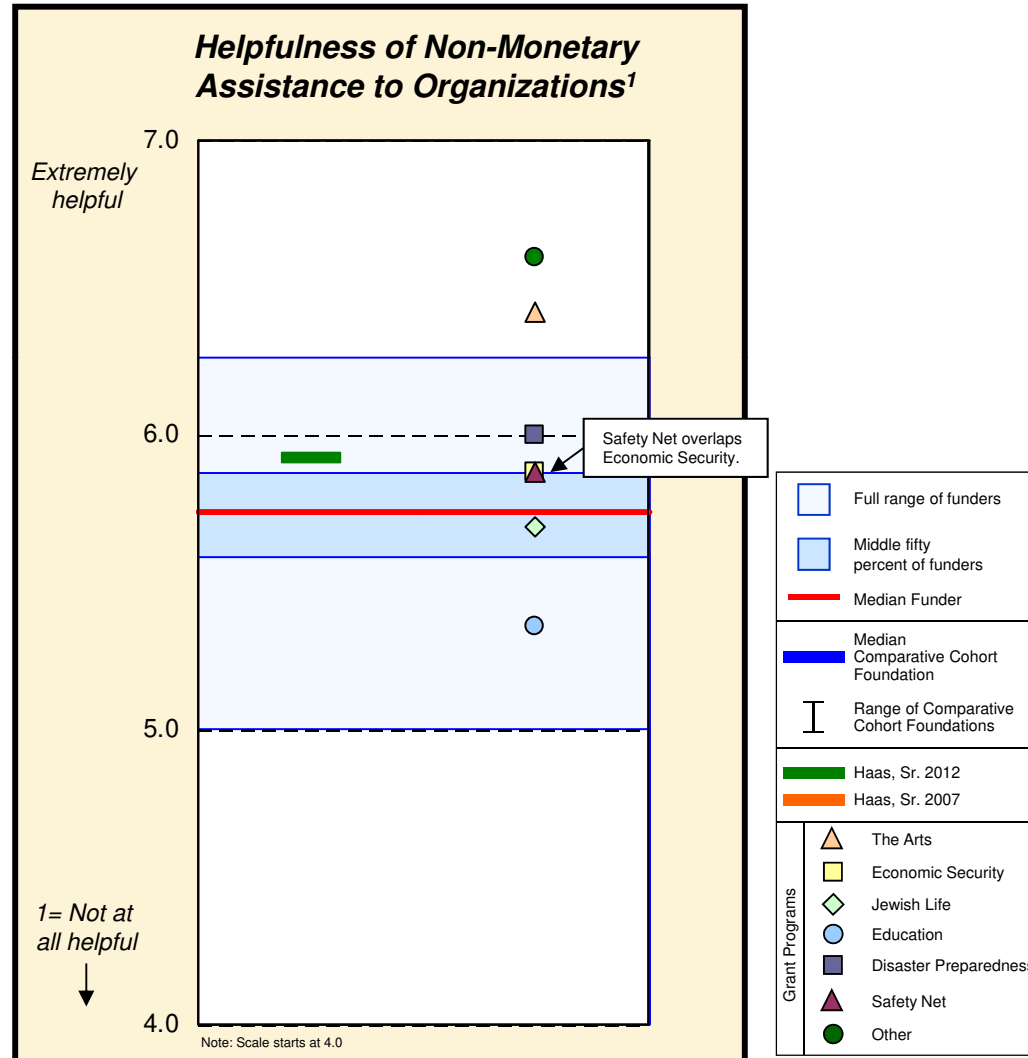
0%

9%

Helpfulness of Non-Monetary Assistance

On helpfulness of the non-monetary assistance provided by the Fund in strengthening grantee organizations' work, Haas, Sr. is rated:

- above 86 percent of funders



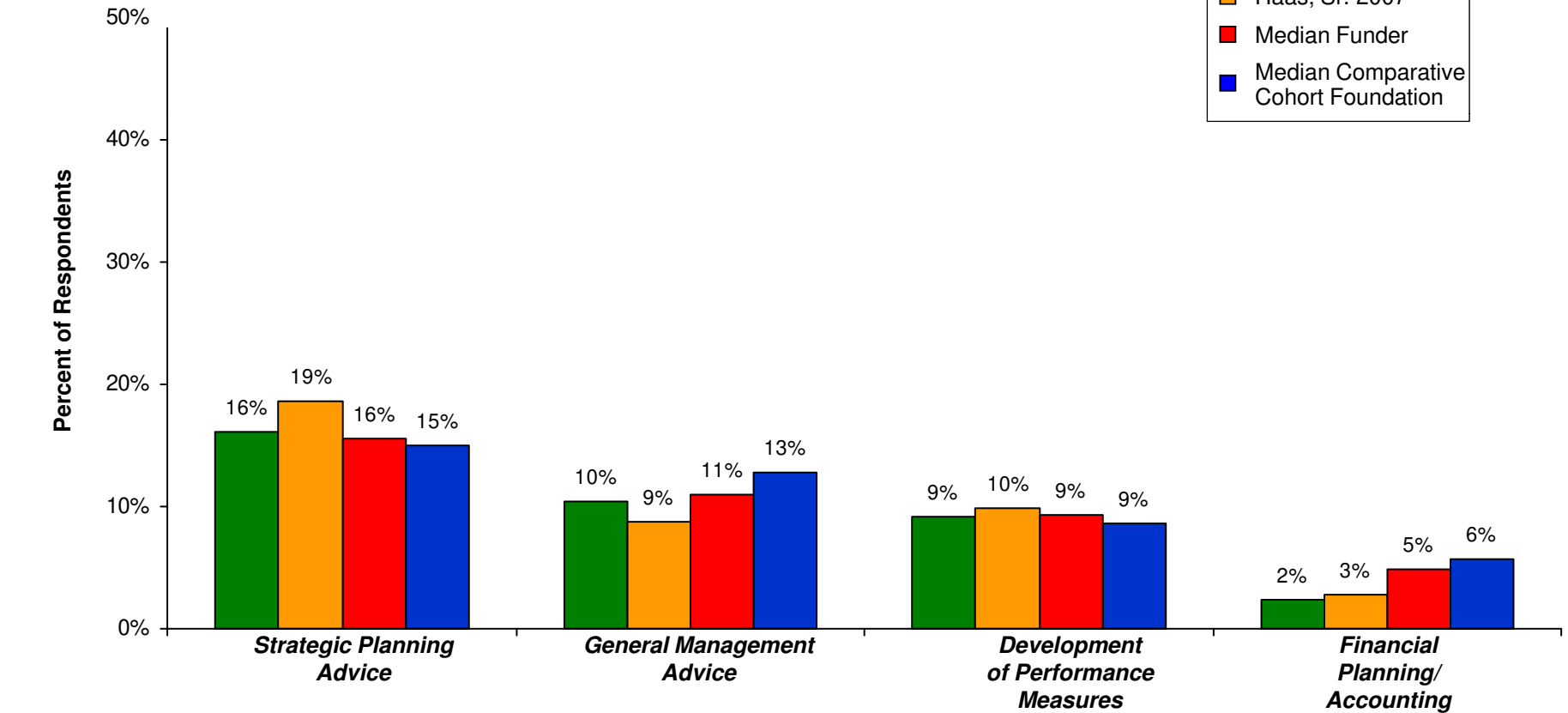
Note: This question was only asked of those grantees that indicated they received non-monetary assistance from staff or a third party paid for by the Fund. Haas, Sr. 2007 data and comparative cohort funder data not available due to changes to the survey instrument.

1: Represents data from 58 funders.

Management Assistance Activities (1)

Frequency of Management Assistance Activities

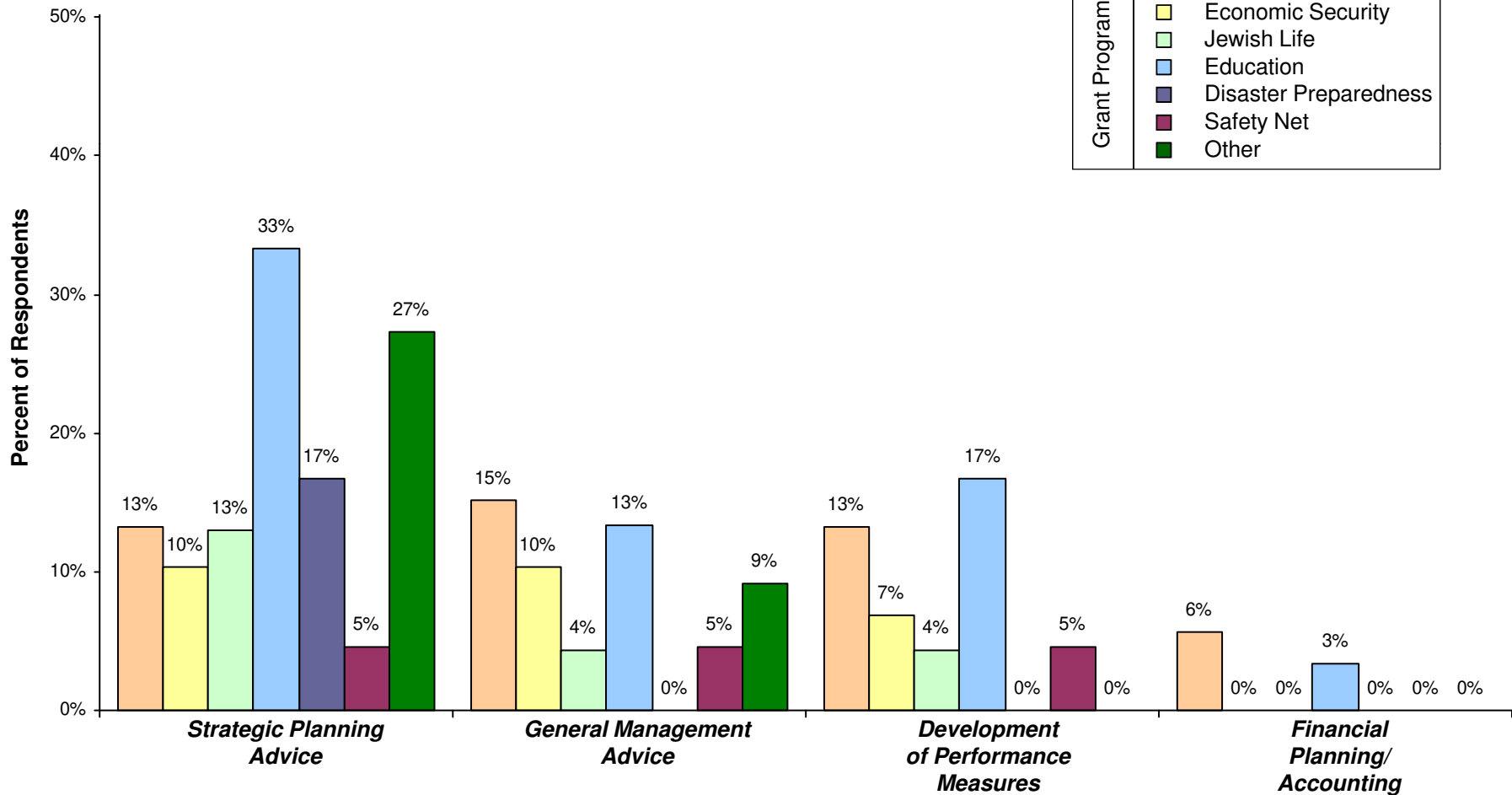
Scale ends at 50%



Management Assistance Activities (2)

Frequency of Management Assistance Activities

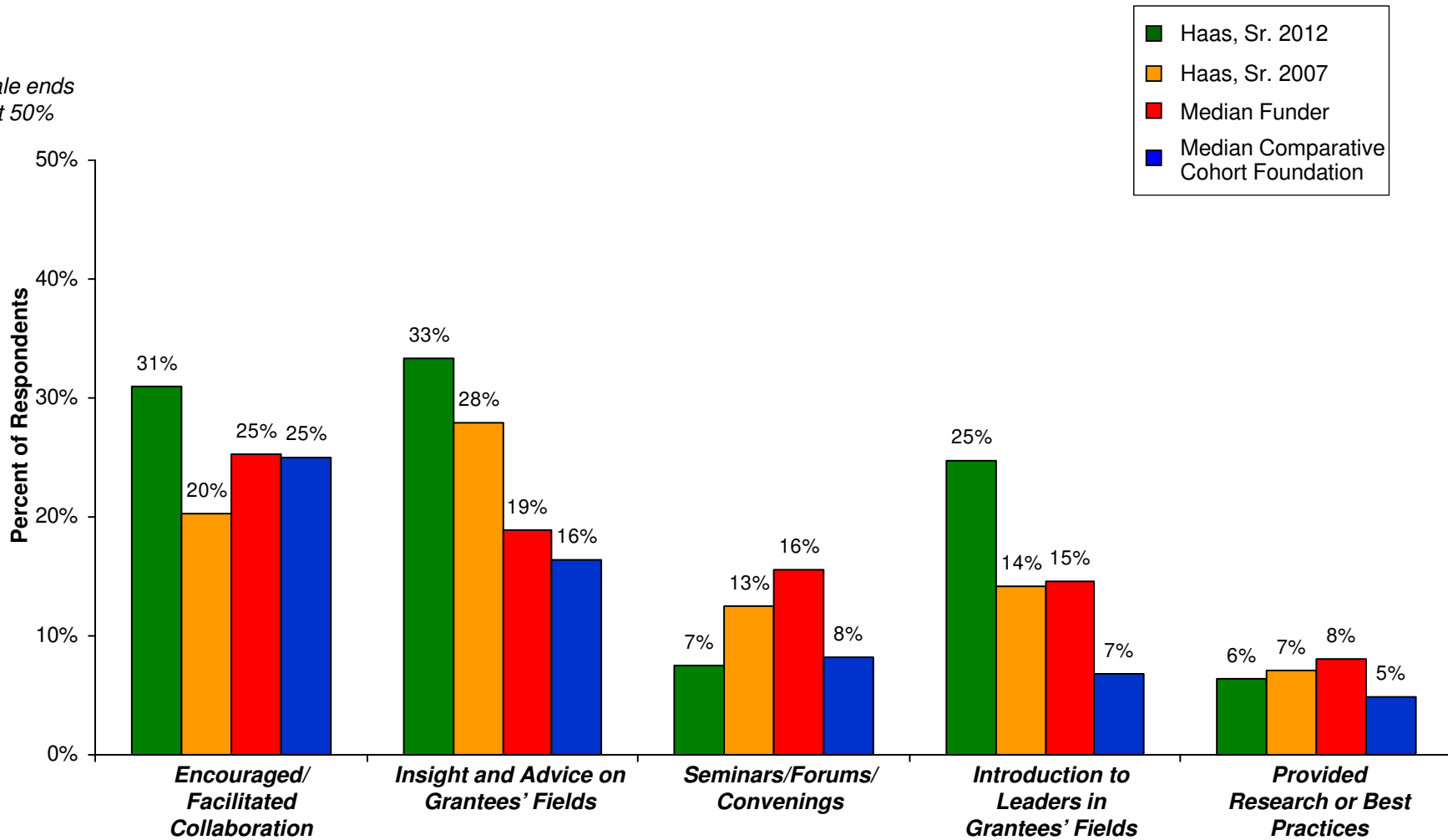
Scale ends at 50%



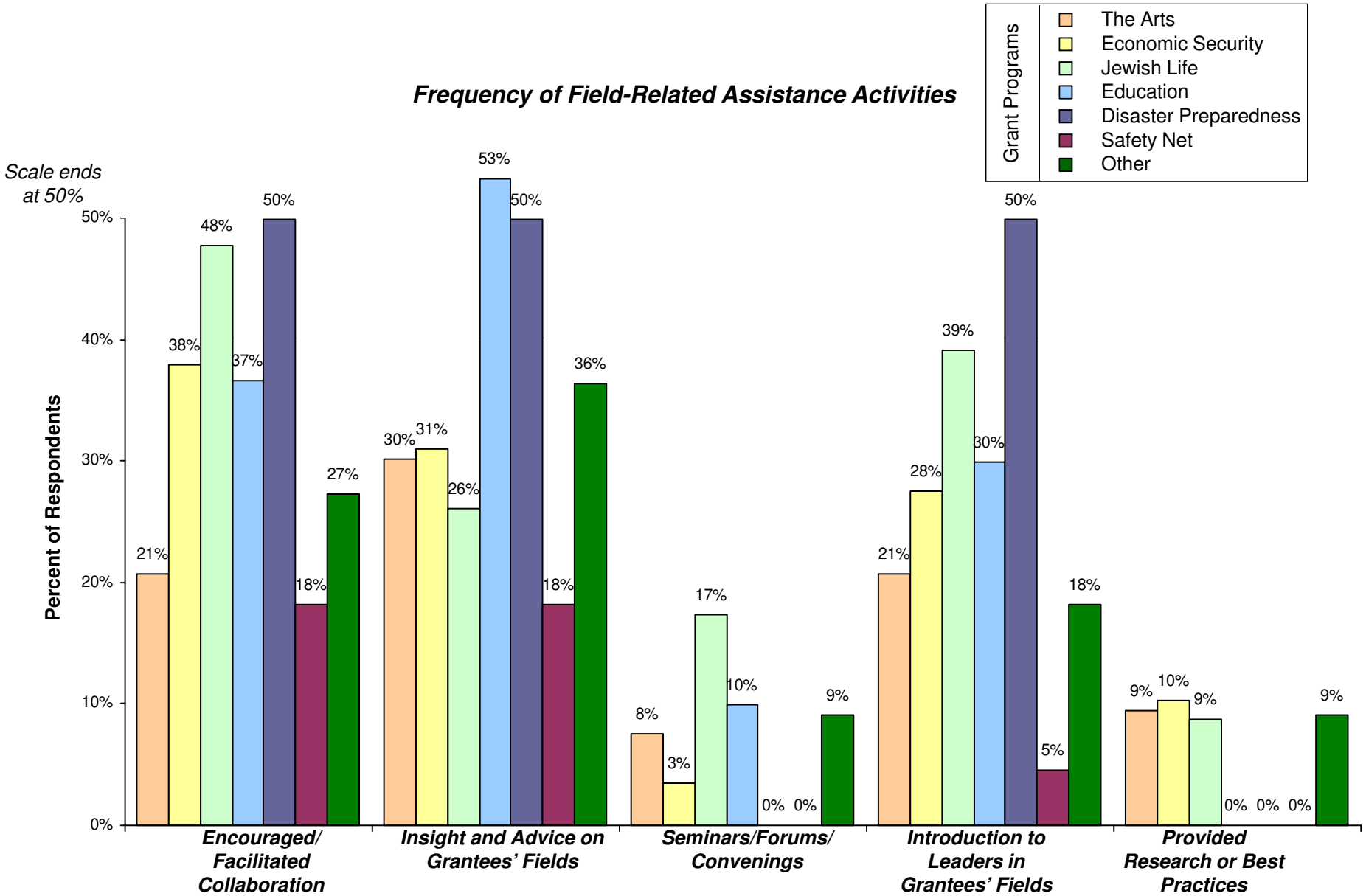
Field-Related Assistance Activities (1)

Frequency of Field-Related Assistance Activities

Scale ends at 50%



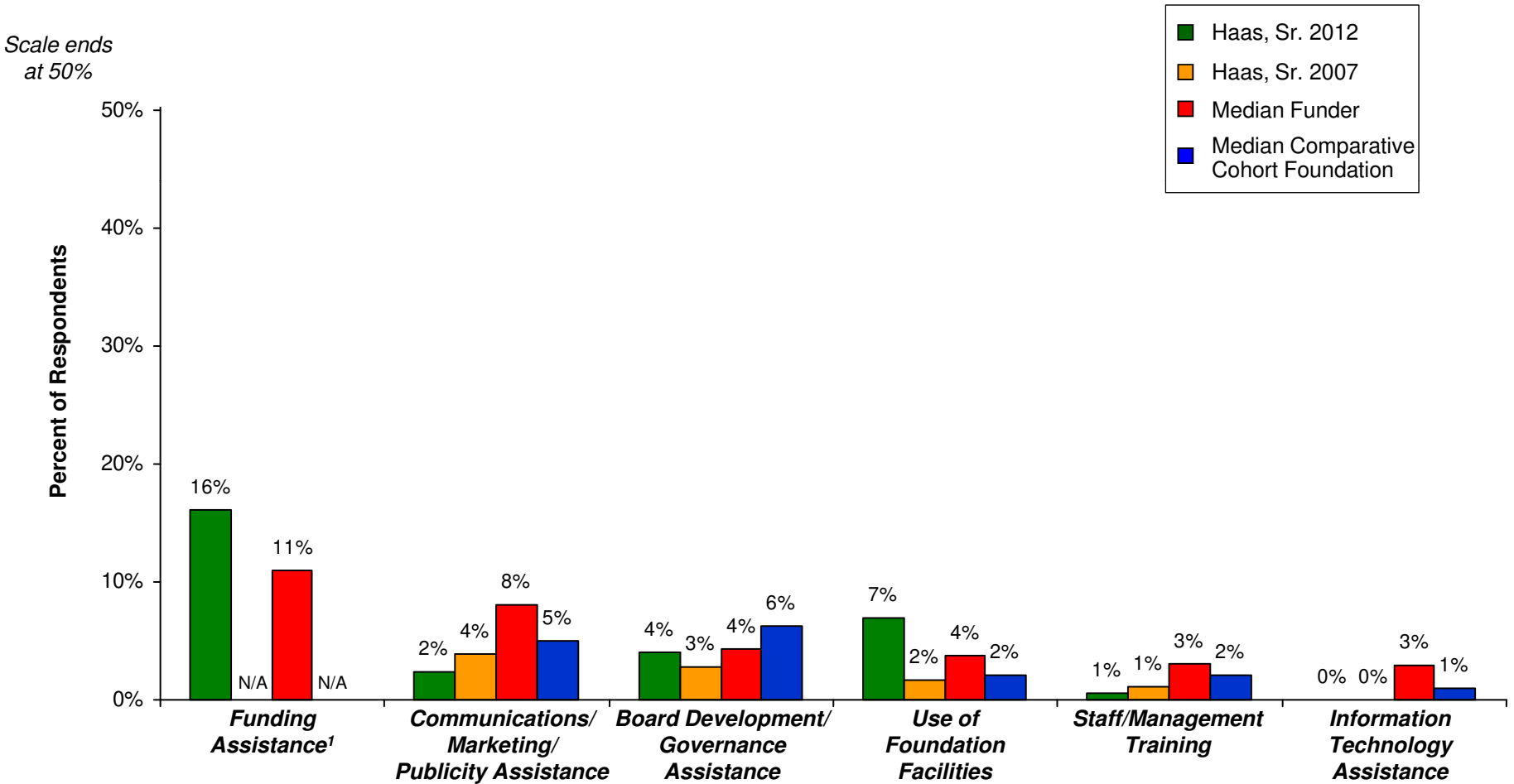
Field-Related Assistance Activities (2)



Other Support Activities (1)

Frequency of Other Assistance Activities

Scale ends at 50%



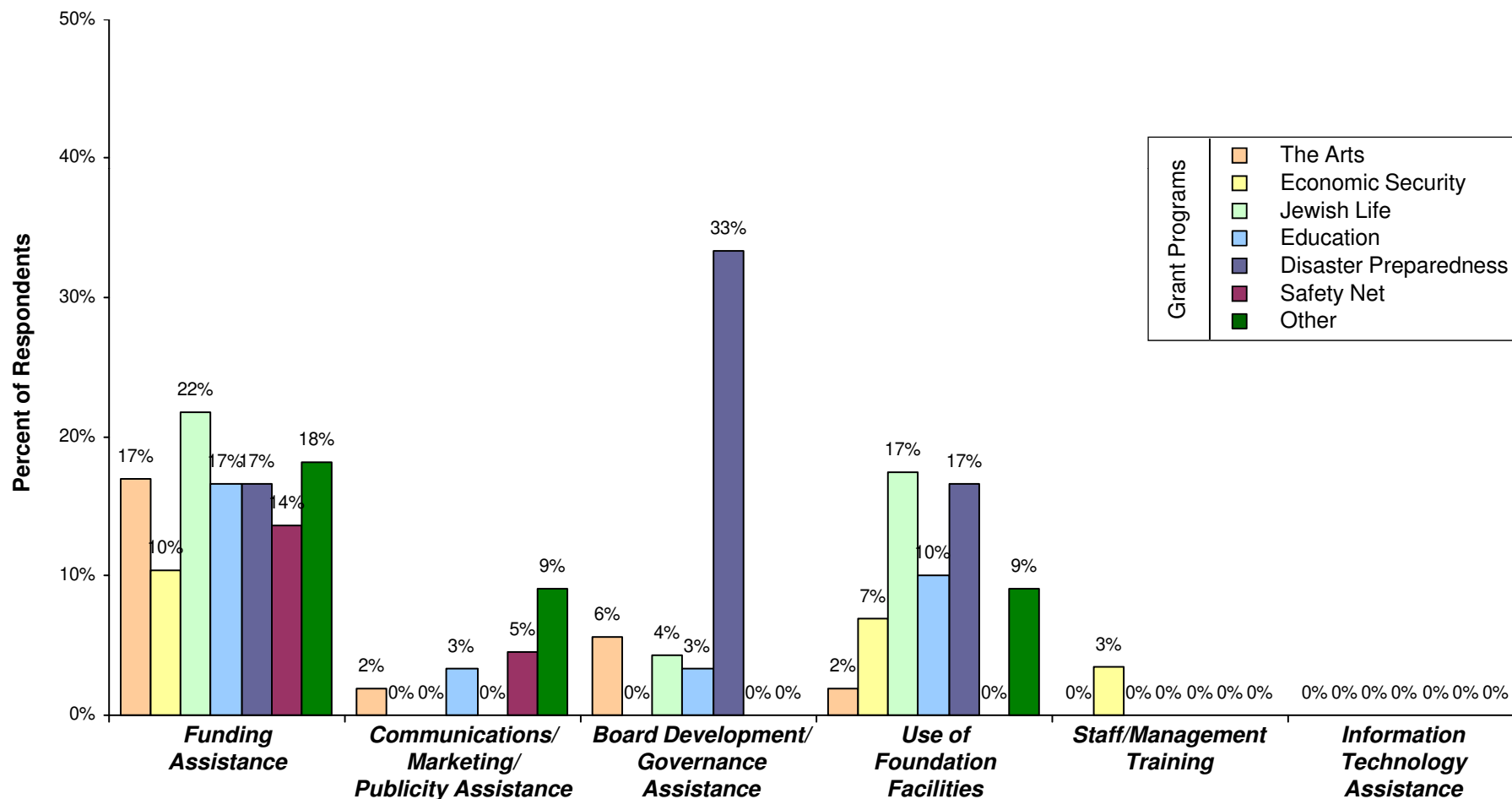
Note: Haas, Sr. 2007 data on "Funding assistance" and Median Comparative Cohort Foundation data on "Funding assistance" not available due to changes to the survey instrument.

1: Represents data from 34 funders.

Other Support Activities (2)

Frequency of Other Assistance Activities

Scale ends at 50%



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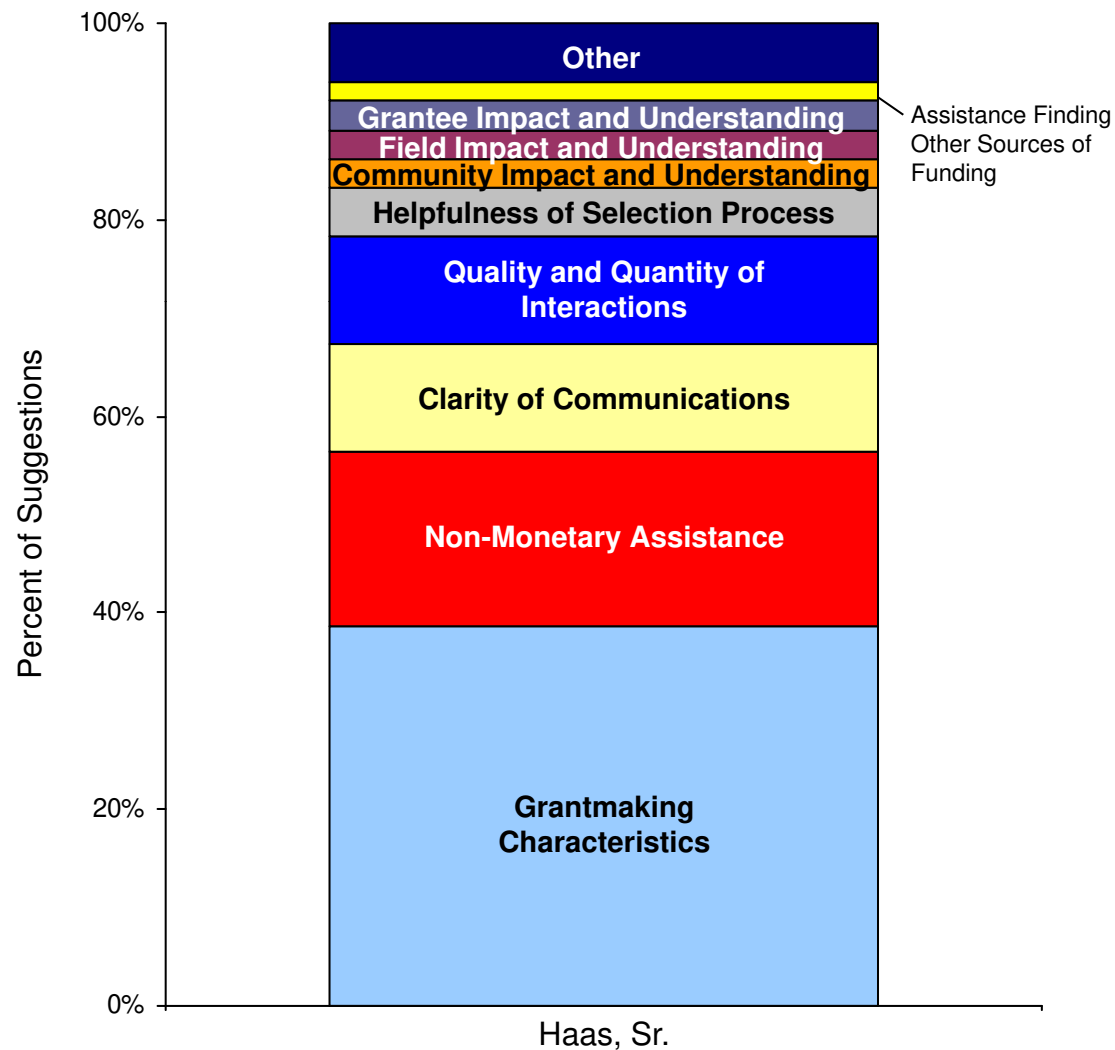
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Grantee Suggestions for the Fund (1)

Grantees were asked to provide any suggestions for how the Fund could improve. The most frequently mentioned suggestions for improvement concern the Fund's grantmaking characteristics.

Topics of Grantee Suggestions



Grantee Suggestions for the Fund (2)

% Grantee Suggestions		Haas, Sr. Grantee Suggestions
Topic of Grantee Suggestion	Haas, Sr.	Sub-Themes and Sample of Comments
Grantmaking Characteristics	39%	<p><u>Length of Grant (n=10):</u> “Consideration of more multi-year grants.” “Allowing for continued funding, rather than requiring grantees to take year off from funding.” “Offer multi-year funding.” “Reinstate multi-year funding.”</p>
		<p><u>Type of Grant (n=7):</u> “General operating support would be an enormous help!” “Operating grants would be hugely beneficial.” “More non-financial support for organizational capacity building.”</p>
		<p><u>Size of Grant (n=3):</u> “A larger pool of resources to distribute to even more worthy organizations!” “I only wish this foundation had more resources with which to play.”</p>
		<p><u>Multiple Grant Characteristics (n=3):</u> “Commit to multi-year grants and allow multiple grants to one agency.” “Issuing multi-year and general support grants would help promote the sustainability of work and organizations.”</p>
		<p><u>Other (n=2):</u> “I would personally prefer it if it wasn't a two years off, three years on situation.”</p>
Non-Monetary Assistance	18%	<p>“I really think of the Walter and Elise Haas Fund as a model for other Foundations. Because they are clearly experts, I think that [other] funders could learn so much from them by a few workshops each year.” “More convenings and learnings that allow funders to work together and share our work.” “[Our organization] would welcome the opportunity to work with the Fund to develop quality leadership across sectors.” “I would suggest the Fund organize quarterly meetings of all the grantees in the same area for people to share news, ideas and resources, as well as to network with one another.” “I think it would be helpful to have a gathering of the organizations Haas funds in a particular category (like, education) to recognize one another and have a roundtable discussion about a particular topic.”</p>

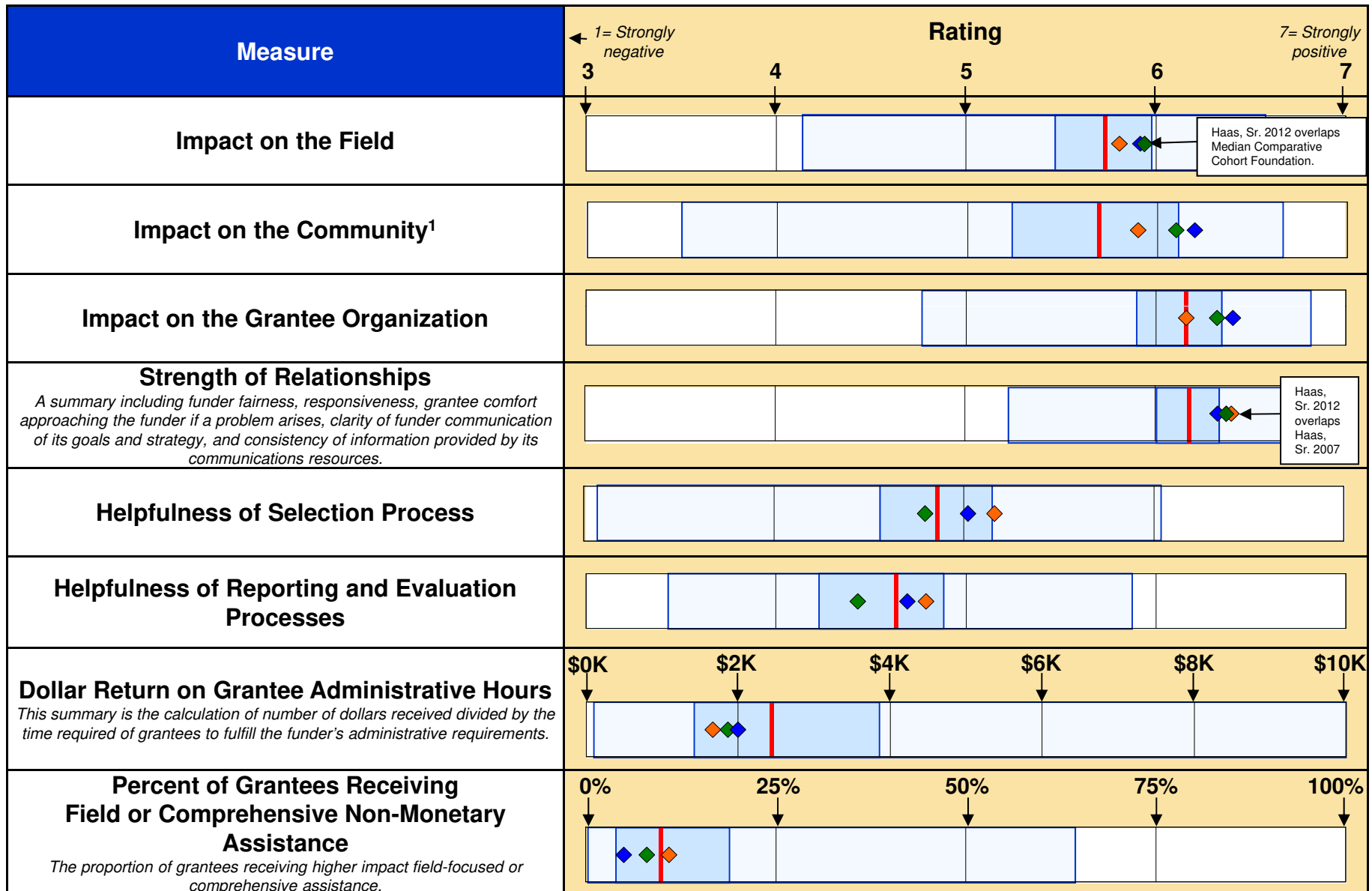
Grantee Suggestions for the Fund (3)

% Grantee Suggestions		Haas, Sr. Grantee Suggestions
Topic of Grantee Suggestion	Haas, Sr.	Sub-Themes and Sample of Comments
Clarity of Communication	11%	<p>"I would like to know more of their long term strategy, especially in relation to sustaining programs as opposed to just starting new ones."</p> <p>"A clarification of goals on the website. What I read there and what I heard from my fund officer were not entirely consistent."</p> <p>"Clearer communication surrounding the length of grant and grant terms from the beginning would have been helpful."</p> <p>"I would love to better understand the...work the Fund does in the Bay Area and how our organization could work within that matrix to do more effective work."</p> <p>"Increased communication and consistent updates on the funding strategies, reports and outcomes."</p>
Quality and Quantity of Interactions	11%	<p>"As accessible as our program officer is, I feel like I don't talk with her enough. I would like more opportunity to interact with her and maybe other Fund staff."</p> <p>"Come out to see programs in action."</p> <p>"Scheduling a face to face meeting with the program officer was a bit difficult, we did not meet until I'd been on the job for over a year. However when we did meet, the meeting was collegial."</p> <p>"More personal connection with organizations that are funded."</p>
Field Impact and Understanding	3%	<p>"Take every opportunity to support culturally-specific artworks. Create as many opportunities as possible to support the creation of new works by [diverse groups] and works that bring together both traditional and modern sensibilities to produce something new and original."</p> <p>"The Fund needs to get a better handle on our field and the critical differences between the diverse organizations, including ours. After this much time the Fund should know our approach, and how we are different, without hesitation."</p>
Grantee Impact and Understanding	3%	<p>"The Fund could better understand the need for [our work]."</p> <p>"Unfortunately, if the Fund discontinues funding, we will likely have to reduce services in San Francisco. There are very few grantors (corporate, philanthropic, family or otherwise) which are willing to fund small nonprofits doing this work."</p>
Assistance Securing Funding from Other Sources	2%	<p>"Connect us with other progressive funders -- this would be especially appreciated"</p>
Other	6%	<p>"Encourage new nonprofit models that have innovative earned revenue strategies in place."</p> <p>"Keep encouraging the new ideas! Don't be overly influenced by trends in government funding."</p>

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Review of Findings



IX. Review of Findings and Intra-Fund 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 Haas, Sr. compared to the minimum, median, and maximum level of change we see across the first to second GPRs of repeat funders.

Measure	2012 to 2007	Maximum Decrease	Median Level of Change	Maximum Increase
Impact on the Field	0.1	-0.4	0.2	1.1
Impact on the Community	0.2	-0.8	0.1	1.1
Impact on the Grantee Organization	0.2	-0.5	0.2	1.0
Strength of Relationships	0.0	-0.5	0.1	0.3
Helpfulness of Selection Process	-0.4	-0.6	0.1	1.3
Helpfulness of Reporting and Evaluation Processes	-0.4	-0.8	0.1	0.9
Dollar Return on Grantee Administrative Hours	\$119	-\$2,321	\$131	\$9,330
Percent Receiving Field or Comprehensive Non-Monetary Assistance	-3%	-30%	2%	29%

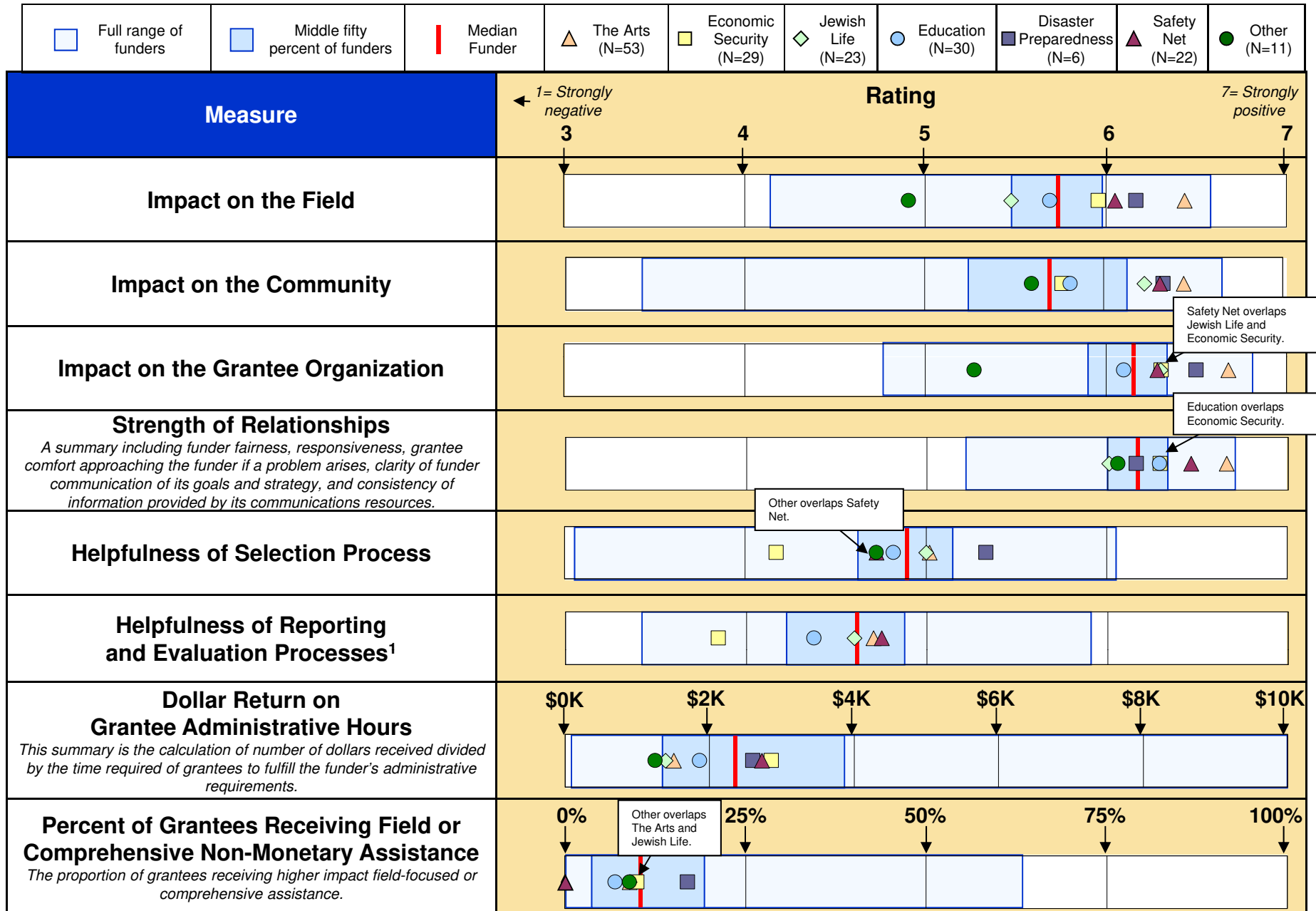
Intra-Fund Differences (1)

Haas, Sr.'s survey results were examined for differences in ratings among grantees based on the following criteria:

- ◆ Grant Programs

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

Intra-Fund Differences (2)



Safety Net overlaps Jewish Life and Economic Security.

Education overlaps Economic Security.

Other overlaps Safety Net.

Other overlaps The Arts and Jewish Life.

1: Disaster Preparedness and Other data not shown because fewer than five responses to the question were received. **CONFIDENTIAL** | © The Center for Effective Philanthropy | 10/2/2012

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Analysis and Discussion (1)

Impact on Grantees' Organizations, Fields, and Communities

Haas, Sr. grantees indicate that the Fund is having a significant impact on their organizations, as well as the fields and communities in which they work. In 2007, Haas, Sr. was rated similarly to the median foundation in CEP's comparative dataset for its impact on grantees' organizations, fields, and communities. Today, the Fund is rated above the median for its impact on all of these areas, signaling substantial improvement in grantees' perceptions. In the words of one grantee: "The Fund not only provides much needed resources to organizations, it also serves as a wonderful community resource for the smaller organizations."

Not only is the Fund rated above the median foundation for its impact on grantees fields, communities, and organizations, it is also rated above the median funder for its understanding of these areas. In particular, grantees note that the Fund is advancing work in their fields: "The Fund is an innovator in the field, willing to take risks with grantees and support them throughout the process." The Fund is also rated above the typical foundation, and similar to Haas, Sr.'s 2007 GPR, for its impact on advancing knowledge and influencing public policy in grantees' fields.

Beyond the Fund's positive impact on grantees' organizations, fields and communities, grantees indicate that the Fund could still do more to provide assistance beyond the grant check. Though grantees rate the helpfulness of the Fund's non-monetary assistance higher than the typical funders', only eight percent of Haas, Sr. grantees report receiving the patterns of non-monetary assistance that CEP's research links with higher ratings of impact. Grantees that do receive more field-focused or comprehensive patterns of non-monetary assistance rate the Fund higher on a variety of measures in the Grantee Perception Report, including the Fund's impact on and understanding of their organizations.

- *How does the Fund currently view its non-monetary assistance relative to its grantmaking? Is it an important part of the Fund's strategy to provide more forms of non-monetary assistance to its grantees, particularly to those grantees that are already getting at least a few forms of assistance?*

Analysis and Discussion (2)

Relationships with Grantees

When Haas, Sr. grantees are asked to describe the Fund, they most frequently use words such as: “supportive,” “thoughtful,” and “responsive.” Indeed, across the Grantee Perception Report, Haas, Sr. grantees report having many aspects of a positive relationship with the Fund. However, grantees indicate that they interact with the Fund less frequently than grantees at the typical foundation.

On a measure that summarizes the quality of the Fund’s relationships with its grantees, the Fund is rated above the median funder in CEP’s dataset. In particular, grantees indicate that they have very positive interactions with the Fund – rating Haas, Sr. above eighty-five percent of funders for the fairness with which it treats grantees, grantees’ comfort approaching the Fund if a problem arises, and the responsiveness of the Fund’s staff. Many grantees comment that their relationship with the Fund is among the best funding relationships they have, noting that the Fund’s staff is “consistently professional, helpful, and deeply committed.”

In CEP’s field-wide research, funders that have the strongest relationships with grantees tend to have strong expertise in their fields of focus, minimize the proportion of grantees receiving yearly or less frequent contact, and have strong understanding of grantees’ goals and strategies. Haas, Sr. is rated higher than the typical foundation in CEP’s comparative dataset on all of these characteristics. However, there may be an opportunity for the Fund to improve on another characteristic associated with strong relationships: balancing the proportion of grantees that report that they most frequently initiate contact with the Fund. Forty-four percent of grantees – a larger than typical proportion – indicate that they most frequently initiate interactions with the Fund, as opposed to their program officer most frequently initiating contact with them or each party initiating with equal frequency. These grantees rate lower on a variety of measures in the Grantee Perception Report, including the quality of their relationship with the Fund and their comfort approaching the Fund if a problem arises.

- *Is the Fund satisfied with its current level of interaction with grantees? In what ways can the Fund document the best practices of its staff when interacting with grantees?*
- *Does the Fund believe that any changes need to be made to account for the larger than typical proportion of its grantees initiating contact with the Fund?*

Analysis and Discussion (3)

Helpfulness of the Fund's Processes

Though many grantees express gratitude for the Fund's "streamlined" processes, they provide mixed feedback around the helpfulness of those processes in strengthening their organizations and programs. Haas, Sr. grantees report spending, on average, thirteen hours completing the Fund's proposal and selection process, compared to twenty hours at the typical foundation. However, grantees rate the helpfulness of the proposal and selection significantly lower than Haas, Sr. grantees in 2007. Grantees spend a larger than typical amount of time on the Fund's reporting and evaluation process, and rate its helpfulness lower than do grantees at the typical foundation.

Grantees' perceptions of the helpfulness of these processes vary – grantees that have more involved engagement around these processes tend to rate them to be more helpful. A larger than typical proportion of the Fund's grantees report discussing their completed report or evaluation with the Fund's staff. Grantees that have discussed these completed reports rate the Fund higher for the helpfulness of its reporting and evaluation process. Similarly, grantees that report having in-person conversations or having a site-visit as a part of their grant selection process rate helpfulness of the selection process significantly higher than do other grantees.

- *How does the Fund currently consider the balance between having an expedient, "concise" grant process, versus having a process that is longer/more involved, but potentially more helpful?*
- *Are there opportunities to take moderate steps to increase the utility of these processes – steps like discussing submitted reports more frequently with grantees?*

Analysis and Discussion (4)

Grantmaking Characteristics

When asked to suggest ways in which the Fund could improve, the largest proportion of Haas, Sr. grantees cite the characteristics of the Fund's grants. A handful of grantees suggest that the Fund consider providing multi-year grants in addition to the operating grants it often provides. Grantees that do report receiving multi-year support rate the Fund higher for its impact on their ability to sustain the work funded by the grant. (It should be noted that the Fund stopped giving multi-year grants between 2010 and 2011, but resumed doing so in 2012)

Other grantees comment on the Fund's policy of requesting that grantees take time off from funding after several consecutive years of grants. Several grantees note that this is an obstacle to their work. In the words of one grantee, "In this economic climate not only is [taking a year off from funding] difficult for an organization, but [the organization] may actually lose some of the capacity they were able to develop." Indeed, the consistency with which grantees receive funding impacts their perceptions of the Fund. As is the case across CEP's comparative dataset, Haas, Sr. grantees that report receiving consistent funding rate higher on most of the measures in the Grantee Perception Report, including the Fund's impact on their organization and the Fund's impact on grantees' ability to sustain the work funded by the grant.

- *Undoubtedly the Fund has considered the length of its grants and the consistency of its funding relationships in the past. Is the Fund in a position to reevaluate its current grantmaking practice? If not, are there opportunities for the Fund to communicate more comprehensively the rationale behind the length and consistency of its grants?*

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Additional GPR Results (1)

Survey Item	Haas, Sr. 2012	Full Dataset Median	Comparative Cohort Foundation Median
Understanding of Social, Cultural, and Socioeconomic Factors			
How well does the Fund understand the social, cultural, and socioeconomic factors that affect your work? (1="Limited understanding", 7="Thorough understanding") ¹	6.1	5.7	N/A
Assessing Results of the Funded Work			
Proportion of grantees that exchanged ideas with Haas, Sr. regarding how it would assess results ²	70%	73%	76%
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 24 funders. Haas, Sr. 2007 and Comparative Cohort Foundation data not available due to changes to the survey instrument.

2: This table includes data from 58 funders. Haas, Sr. 2007 data not available due to changes to the survey instrument.

Online Media

Measure	Haas, Sr. 2012			Full Dataset Median		
Use of Online Resources Created by the Foundation or its Staff						
Facebook	4%			7%		
Video Sharing (e.g., YouTube)	3%			5%		
Blog(s)	4%			4%		
Twitter	2%			3%		
None of the above	36%			47%		
Don't know whether the Foundation uses these online media resources	57%			37%		
Potential Use of Online Resources (only asked of grantees who did not select one or more options to the question above)						
Facebook	48%			41%		
Video Sharing (e.g., YouTube)	63%			53%		
Blog(s)	54%			48%		
Twitter	29%			20%		
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	33%	33%	0%	41%	33%	13%
Video Sharing (e.g., YouTube)	40%	40%	0%	33%	54%	7%
Blog(s)	71%	43%	0%	41%	55%	8%
Twitter				33%	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	4.9			4.9		
To learn about information relevant to the fields or communities in which grantees work	4.8			5.0		
To learn about the Foundation's goals and strategies	4.9			4.8		
To interact and share ideas with the Foundation	4.1			4.2		
Use of Online Resources to Communicate About Grantees' Work						
Facebook	92%			77%		
Video Sharing (e.g., YouTube)	69%			52%		
Blog(s)	42%			34%		
Twitter	65%			44%		
Other	25%			15%		
None of the above	3%			13%		

Note: This table represents data from 41 funders, except "Use of Online Resources to Communicate About Grantees' Work" which represents data from 43 funders. Haas, Sr. 2007 and Comparative Cohort Foundation data not available due to changes to the survey instrument.