

Grantee Perception Report®

prepared for the

Lucile Packard Foundation for Children's Health

2006



THE CENTER FOR
EFFECTIVE PHILANTHROPY

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Background

- ♦ Since February 2003, the Center for Effective Philanthropy (CEP) has conducted surveys of grantees on their perceptions of their foundation funders both on behalf of individual foundations and independently. The purpose of these surveys is two-fold: to gather data that is useful on a field-wide basis – forming the basis of research reports such as *Listening to Grantees: What Nonprofits Value in Their Foundation Funders* (April 2004) – and to provide individual foundations with Grantee Perception Reports.
- ♦ **The Grantee Perception Report® (GPR) shows an individual foundation its grantee perceptions relative to a set of perceptions of other foundations whose grantees were surveyed by CEP. Although grantee perceptions are not definitive evidence of a foundation’s end social impact, they can be helpful in assessing a foundation’s overall performance and progress.**
 - 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 unique strategy of the foundation.
 - The survey covers many areas in which grantees’ perceptions might be interesting to a foundation. Each foundation should place emphasis on the areas covered according to the foundation’s specific priorities.
 - Low ratings in an area that is not core to a foundation’s strategy may not be concerning to a foundation. For example, a foundation 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, foundation structural characteristics – such as type, asset size, focus, and age – are not strong predictors of grantee perceptions, suggesting that it is possible for all foundations to attain high ratings from grantees.

Methodology (1)

- ◆ The Center for Effective Philanthropy has surveyed more than 31,000 grantees of 163 foundations from 2003 through 2005 (see Appendix for full list of foundations), receiving nearly 20,000 completed responses via mail and the Web.¹
 - 72 June 2003 – June 2005 grantees of the Lucile Packard Foundation for Children’s Health (“LPFCH”) were surveyed from September – October 2005.
 - 47 completed responses were received, representing a 65 percent response rate.

- ◆ Contact information for June 2003 – June 2005 grant recipients was provided by LPFCH.

- ◆ Selected grantee comments are shown throughout this report. As with grantee ratings, grantee comments are generally positive. This selection of comments highlights major themes, and reflect trends in the data. These selected comments over-represent negative comments about the Foundation in order to offer Foundation leadership a wide range of perspectives.

1: Response rates vary by round, but do not have any effect on grantee ratings, which remain consistent – and comparable – among rounds in terms of average and range. Response rate for the survey was 53 percent in the February 2003 round, 66 percent in the September 2003 round, 65 percent in the March 2004 survey round, 65 percent in the September 2004 survey round, 67 percent in the March 2005 round, and 64 percent in the September 2005 round. There are no meaningful differences between responses received via the mail or the Web.

Methodology (2)

- ♦ The average response for LPFCH is shown throughout this report relative to the range of responses for all foundations CEP has surveyed from 2003 through 2005.
 - In addition, LPFCH is compared to a cohort of health-focused foundations. The fifteen foundations that comprise this group are:
 - The Assisi Foundation of Memphis, Inc.
 - Baptist Community Ministries
 - Blue Cross Blue Shield of Massachusetts Foundation
 - Connecticut Health Foundation, Inc.
 - Endowment for Health
 - The Frist Foundation
 - Health Foundation of Greater Cincinnati
 - Kansas Health Foundation
 - Lucile Packard Foundation for Children's Health
 - Maine Health Access Foundation
 - Michael Reese Health Trust
 - The Mt. Sinai Health Care Foundation
 - Quantum Foundation
 - Rose Community Foundation
 - Winter Park Health Foundation

Key Findings

The Lucile Packard Foundation for Children’s Health (“LPFCH”) is viewed by many grantees as a “leader” in its fields of funding, and grantees comment frequently – and positively – on its focus on the health and well-being of children. Grantees rate the Foundation’s understanding of their fields above the rating of the median foundation, and LPFCH is rated substantially above the median foundation in its ability to advance knowledge in grantees’ fields. The Foundation is also rated highly in its effect on public policy in grantees’ fields.

Compared to grantees of other foundations, LPFCH grantees are more satisfied with their experience with the Foundation and rate the Foundation more positively in terms of its impact on their organizations. The Foundation is highly rated in the quality of interactions, and Foundation staff are described as “helpful,” “supportive,” and “responsive.” LPFCH is also rated more positively relative to other foundations in the clarity of communication of the Foundation’s goals and strategy. The Foundation’s website and funding guidelines are particularly highly rated in their helpfulness to grantees. Importantly, the different communications resources offered by the Foundation, both written and personal, are rated as consistent in the information they provide about the Foundation’s goals and strategy.

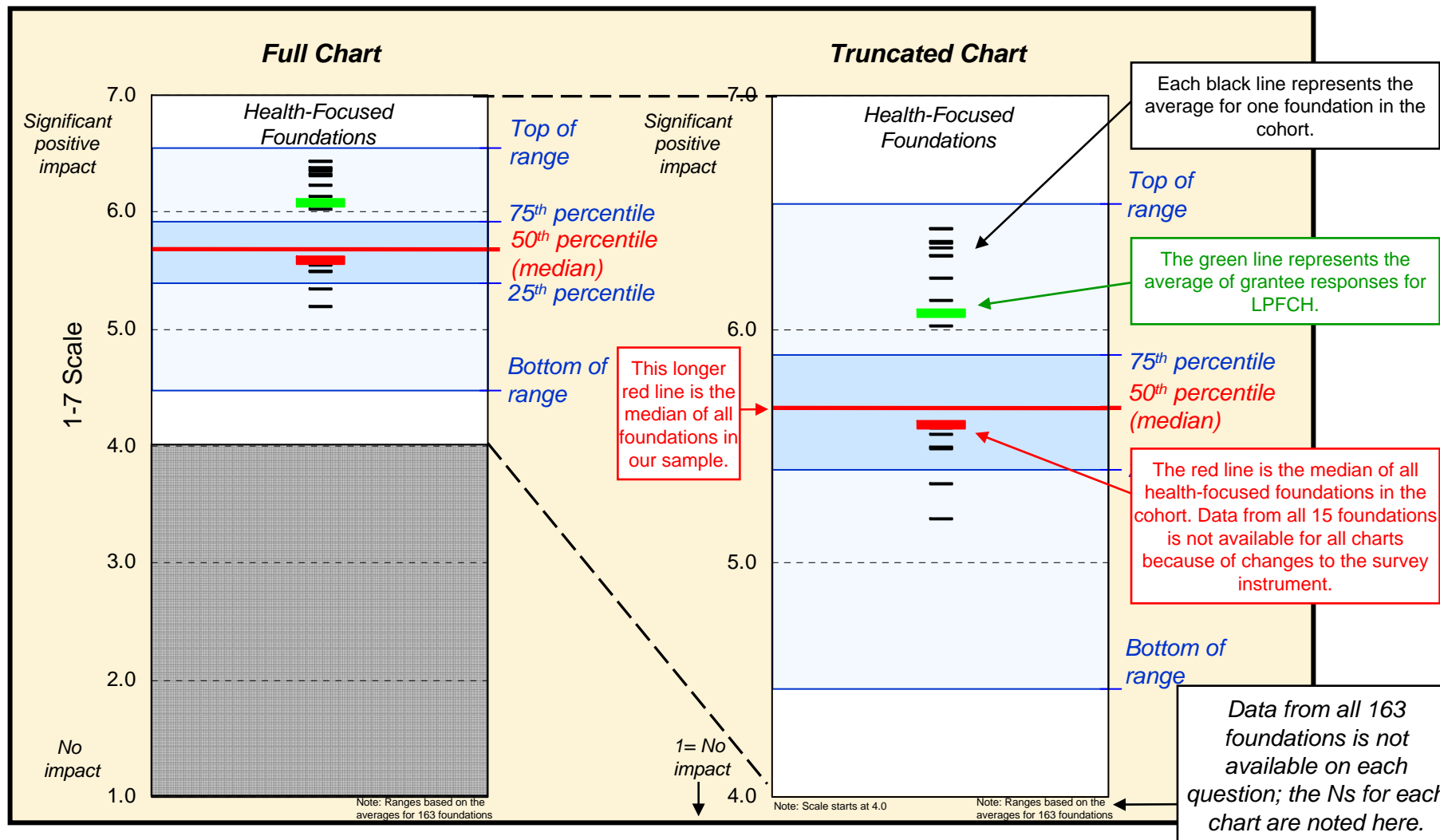
LPFCH provides grantees with more assistance beyond the grant check than is typical. Eighty percent of grantees receive non-monetary assistance, which is a substantial proportion relative to both the overall sample and the cohort of health-focused foundations – a group that more frequently provides non-monetary assistance to grantees. LPFCH also provides more assistance to grantees in securing funding from other sources. The assistance activities provided by the Foundation are seen to vary in their helpfulness, and funding assistance is rated below the median.

The Foundation’s understanding of grantees’ goals and strategy and the populations they serve are rated below the median. LPFCH grantees perceive substantially greater pressure to modify their priorities to create a request that is likely to receive funding, and grantee perceptions of greater pressure are statistically related to less positive perceptions of the Foundation’s understanding of their organizations and the populations they serve.

Finally, LPFCH’s selection and reporting processes are rated more positively in their helpfulness in strengthening grantees than is typical. Compared to grantees of the median foundation, LPFCH grantees report that LPFCH staff is substantially more involved in the selection process, and, when asked about the Foundation’s feedback on proposal drafts, agree that it is “constructive.” Grantees also agree that staff’s feedback on submitted reports and evaluations is “constructive.” However, in response to open-ended questions, grantees frequently comment that the Foundation’s forms are “complicated.” The Foundation’s processes are substantially more time-intensive than those of other foundations, offsetting the substantially larger dollar amount of grants awarded.

Reading GPR Charts

Much of the grantee perception data in the GPR is presented in the format below. These graphs show average ratings of grantee responses for individual foundations, over a background that shows percentiles for the overall sample of grantee ratings of all 163 foundations. **Throughout the report, many charts in this format are truncated from the full scale because foundation averages fall within the top half of the range.**



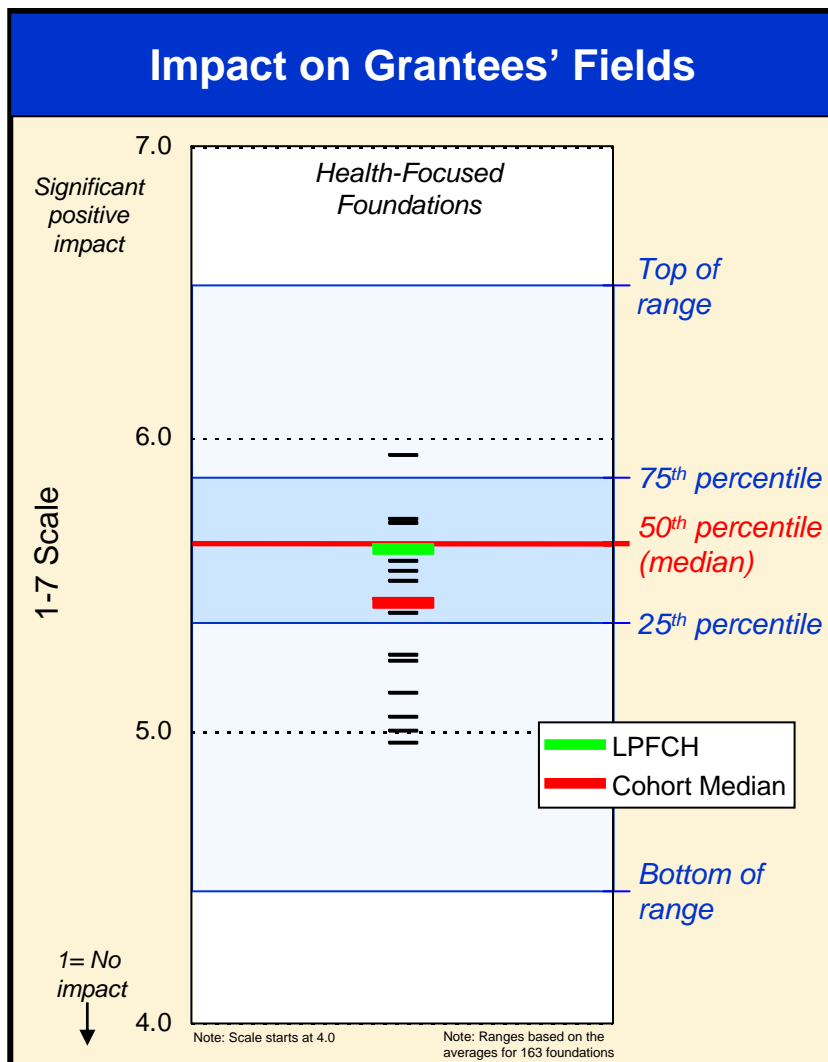
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Impact on Grantees' Fields

This rating highlights grantees' perceptions of foundations' impact on the fields¹ in which grantees operate.

- ◆ *LPFCH grantees rate the Foundation's impact on their fields as positively as the rating of the median foundation, and more positively than the rating of the median health-focused foundation.*

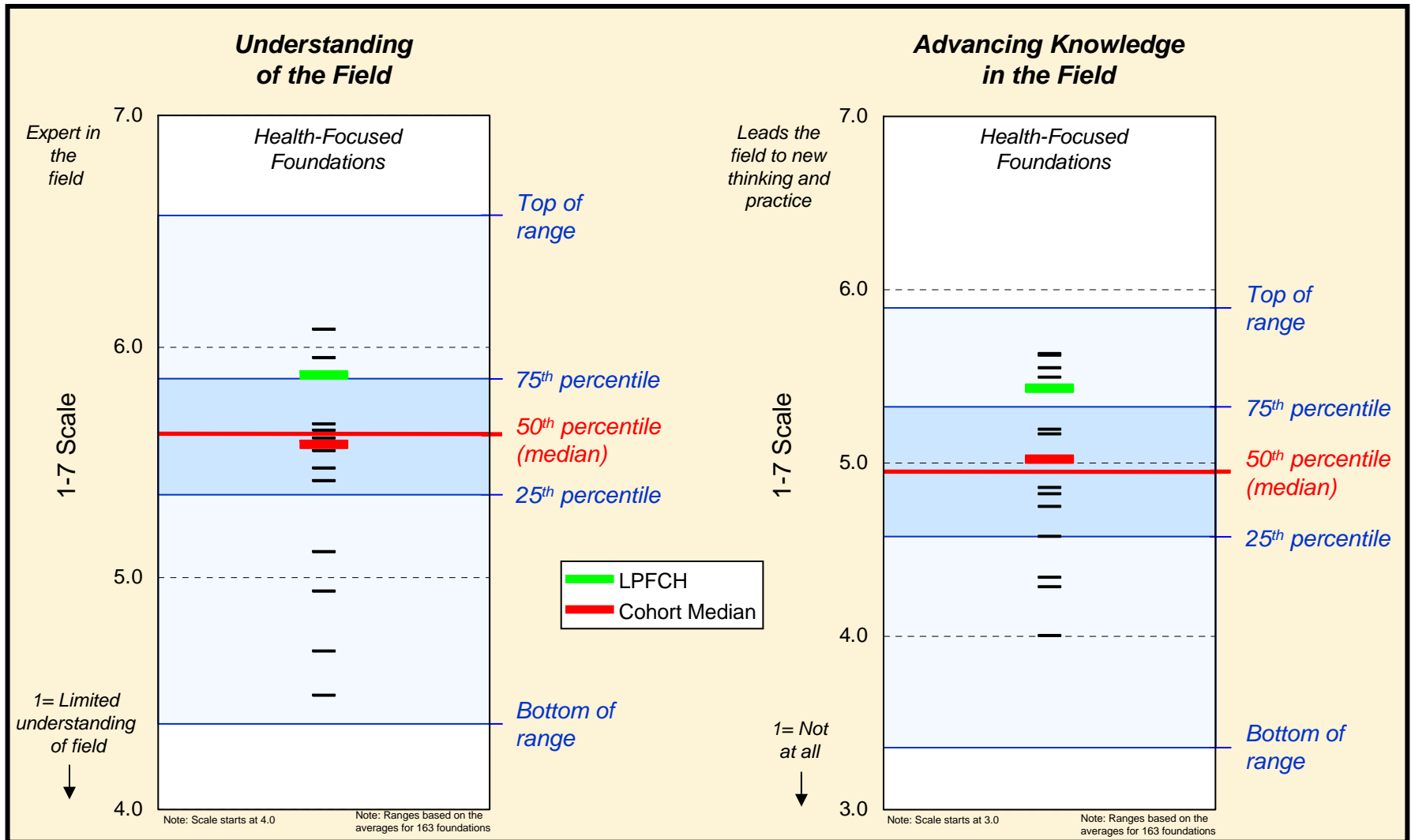


Grantee Comments on Field Impact

- ◆ *“LPFCH provides support and leadership in the field of health and wellness for children – they are a beacon, and organizations look to them for trends and ideas for the future.”*
- ◆ *“They have conducted research that has been very helpful in understanding the needs of the children in our community, and their website gives access to excellent research and information for program planning.”*
- ◆ *“They are leaders in the field and help disseminate new information through [the] Kidsdata [website] and other initiatives.”*
- ◆ *“The Foundation has always been at the forefront of issues and solutions related to the health and well-being of children and families in our community, and they continue to be at the table anytime there is something new or important in the field.”*
- ◆ *“They are one of the first organizations to research and fund the middle school age child.”*

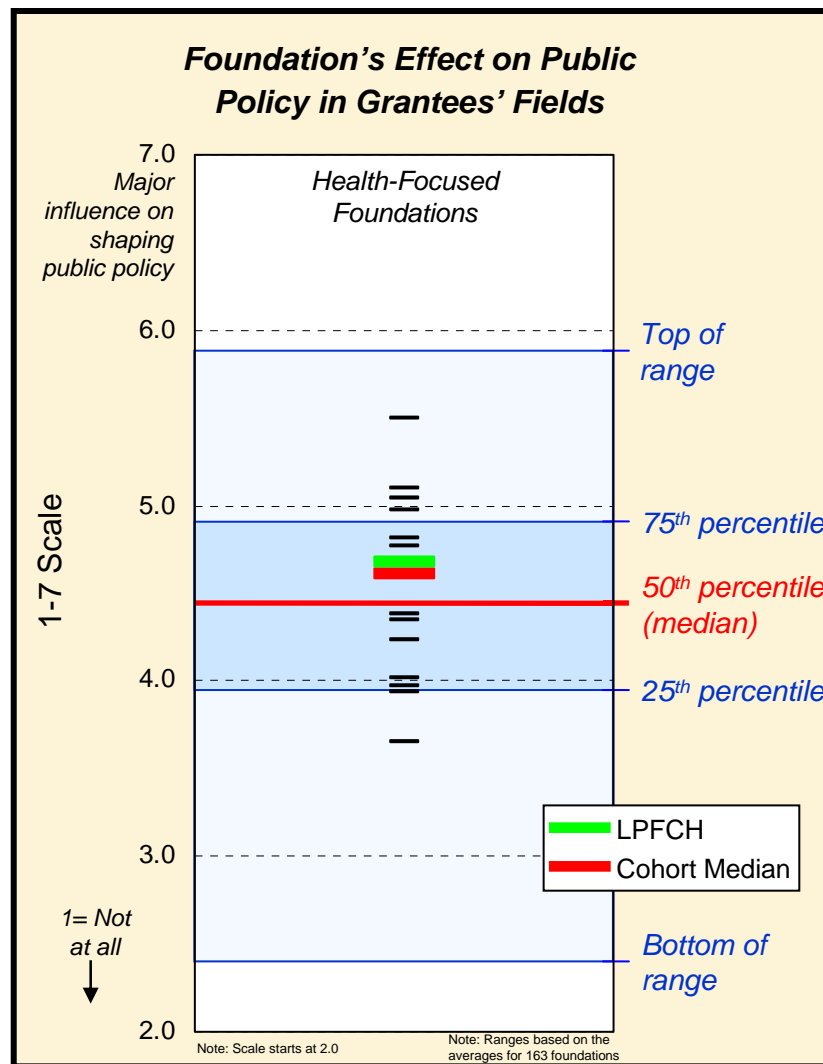
Understanding and Advancing Knowledge in the Field

Grantees perceive LPFCH to have an *understanding of its fields of funding* that is above the rating of the median foundation, and an *ability to advance knowledge in those fields* that is substantially above the rating of the median foundation.



Effect on Public Policy

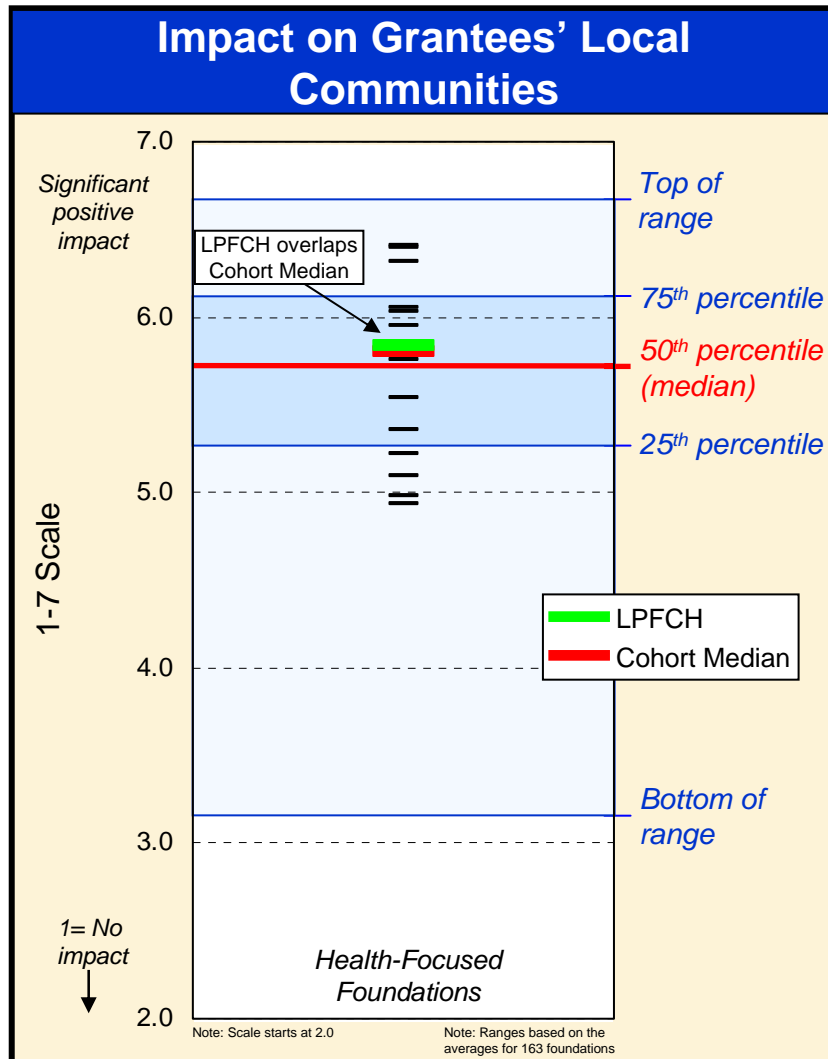
The Foundation is seen as having more influence on public policy in its fields than the median foundation, and a typical influence compared to the median health-focused foundation.



Impact on Grantees' Local Communities

This measure highlights grantees' perceptions of foundations' impact on their local communities.

- ◆ *LPFCH grantees rate the Foundation's impact on their local communities similarly to the average rating received by the median foundation.*

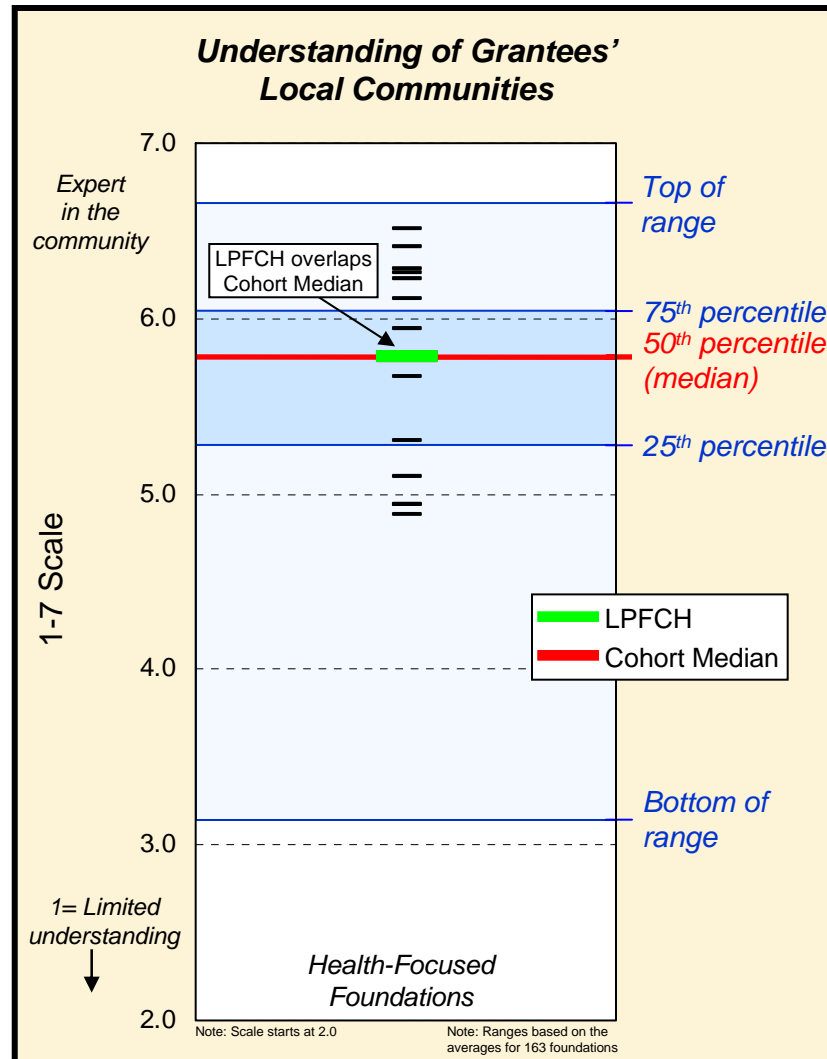


Grantee Comments on Community Impact

- ◆ *“We are aware that the Foundation funds many programs in the community related to the well-being of children and youth, and has a particular concern for disadvantaged young people. Were it not for the Foundation's support, many young children and youth would not receive much-needed services. It is safe to say that the Foundation has a very significant impact on our community and in the field of children and youth services.”*
- ◆ *“The Foundation hosts a community calendar of resources, classes, and activities, which are needed and accessed by agencies and families throughout our community.”*
- ◆ *“The innovative work supported by the Foundation has had a major impact on both the community and the child safety field.”*
- ◆ *“The Foundation sets a positive example of community support for children who are disadvantaged.”*

Understanding of Grantees' Local Communities

LPFCH grantees rate the Foundation's understanding of their communities at the rating of the median foundation.

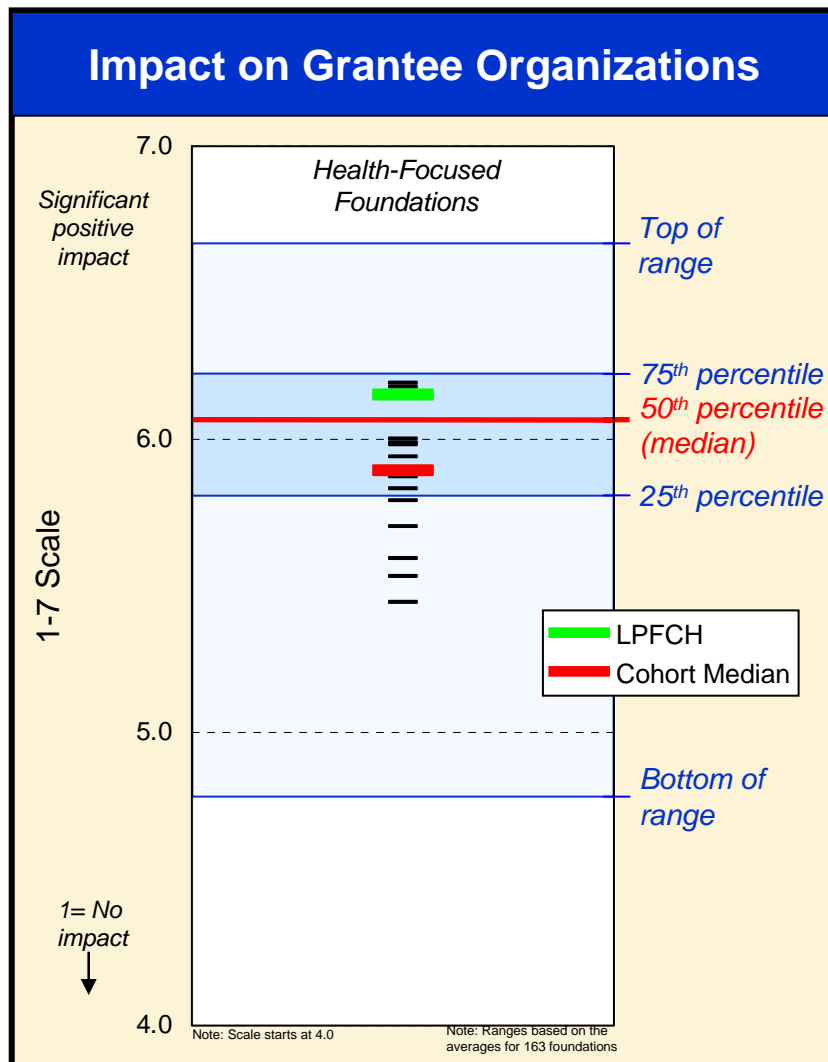


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Impact on Grantee Organizations

LPFCH grantees rate the Foundation's impact on their organizations more positively than the median foundation is rated by its grantees, and even more positively than the median health-focused foundation is rated by its grantees.



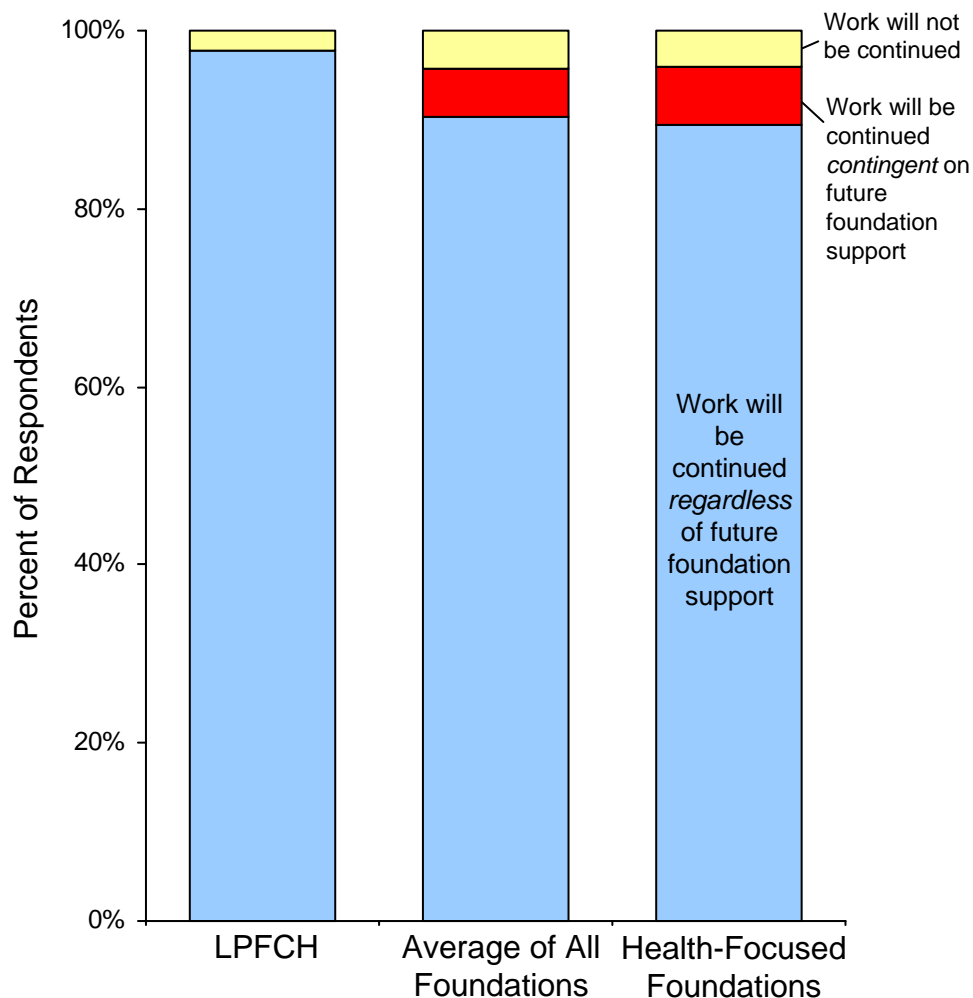
Grantee Comments on Organizational Impact

- ♦ *“Funds jumpstarted our program after it had been declining [and] allowed us to cement relationships with [other nonprofits]! Allowed us to improve protocols, materials, and evaluations.”*
- ♦ *“Our program officer is extremely thorough and dedicated. Her support, suggestions, edits, and fabulous questions were invaluable. We have grown a lot as an organization through this grant process, and the actual grant is facilitating extremely important learning, expansion, and organizational effectiveness, besides bringing our amazing program to so many at risk youth.”*
- ♦ *“The funds received have allowed us to expand our services in the community. This not only facilitates employment and other grant resources, [but] it builds employee pride and agency cohesiveness.”*
- ♦ *“By allowing us to analyze our programming, the LPFCH gave us the chance to really move ahead on future visioning for the agency (directions of programming), and, more specifically for this program, it allowed us to streamline, improve, [and] broaden impact.”*
- ♦ *“The Foundation aided in our program development, expansion, and professional field training.”*

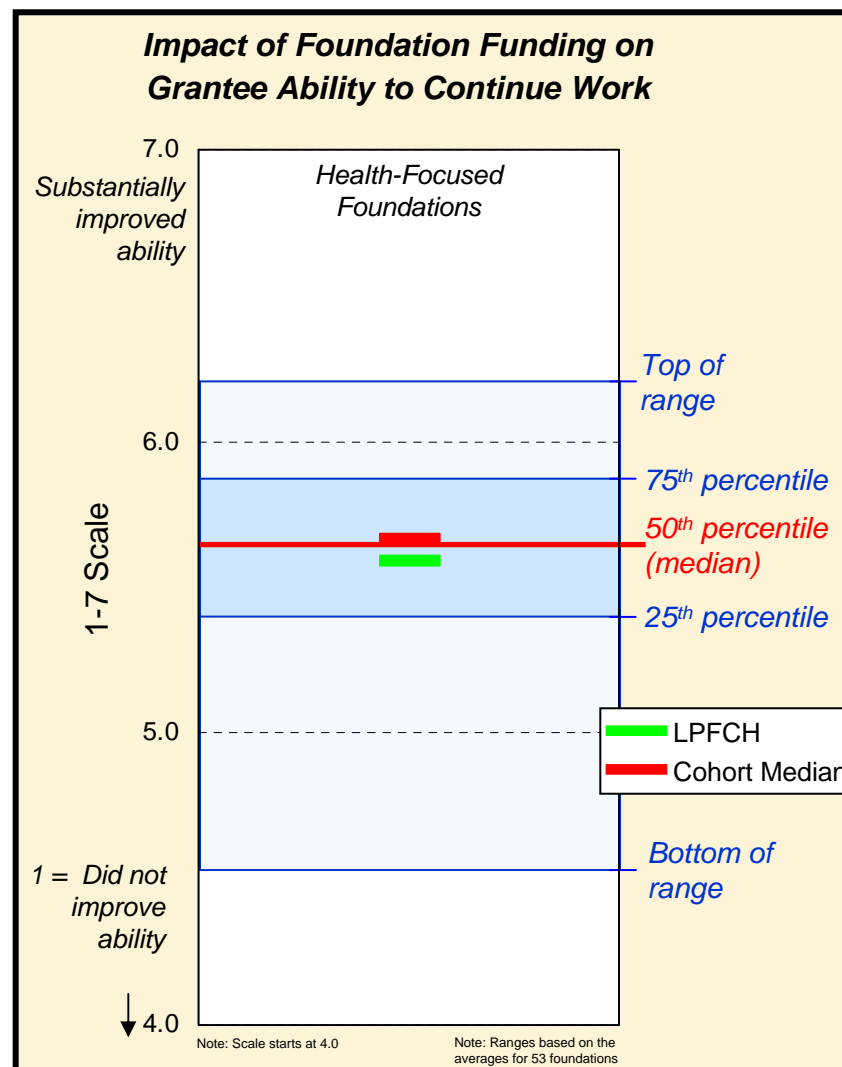
Sustainability of Funded Work

The majority of LPFCH grantees state that the work funded by their grant from the Foundation will be continued regardless of future foundation support. LPFCH grantees' rating of the Foundation's impact on their ability to continue their work is similar to the rating received by the median foundation.

Plans for Funded Work Beyond the Grant Period



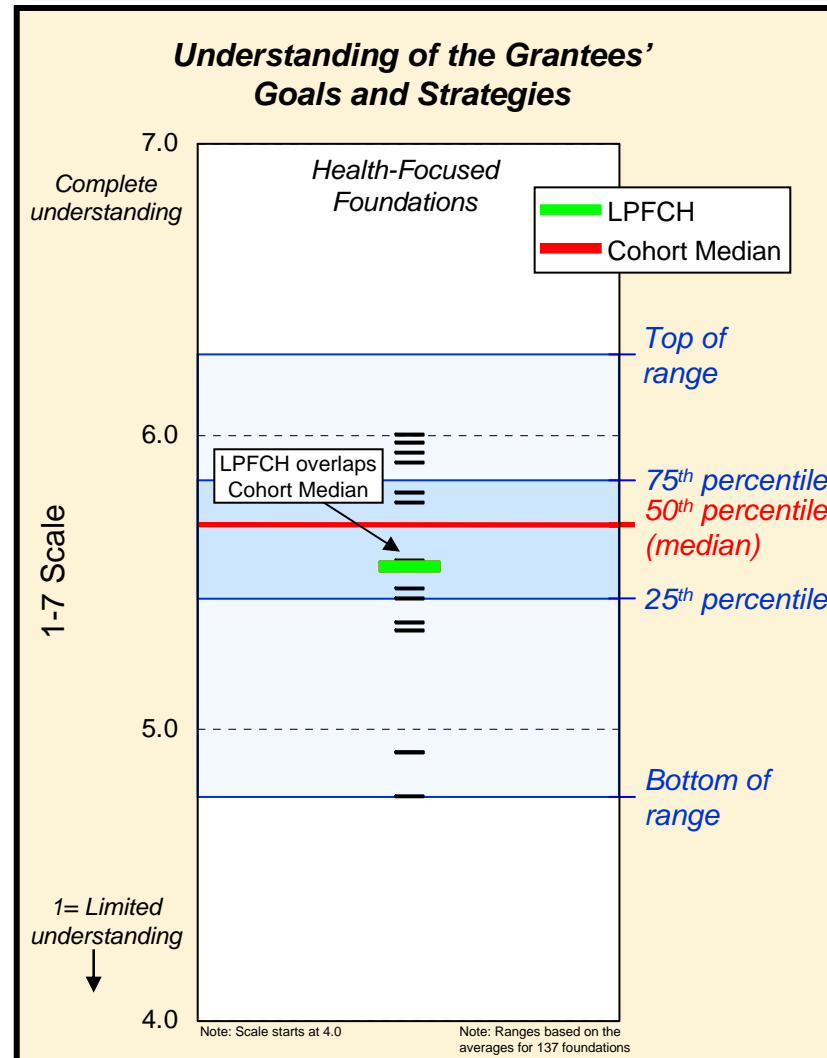
Impact of Foundation Funding on Grantee Ability to Continue Work



Note: Left-hand chart includes data about 53 foundations. The cohort median in the right-hand chart includes data about 5 foundations. Average foundation ratings not shown to protect confidentiality.

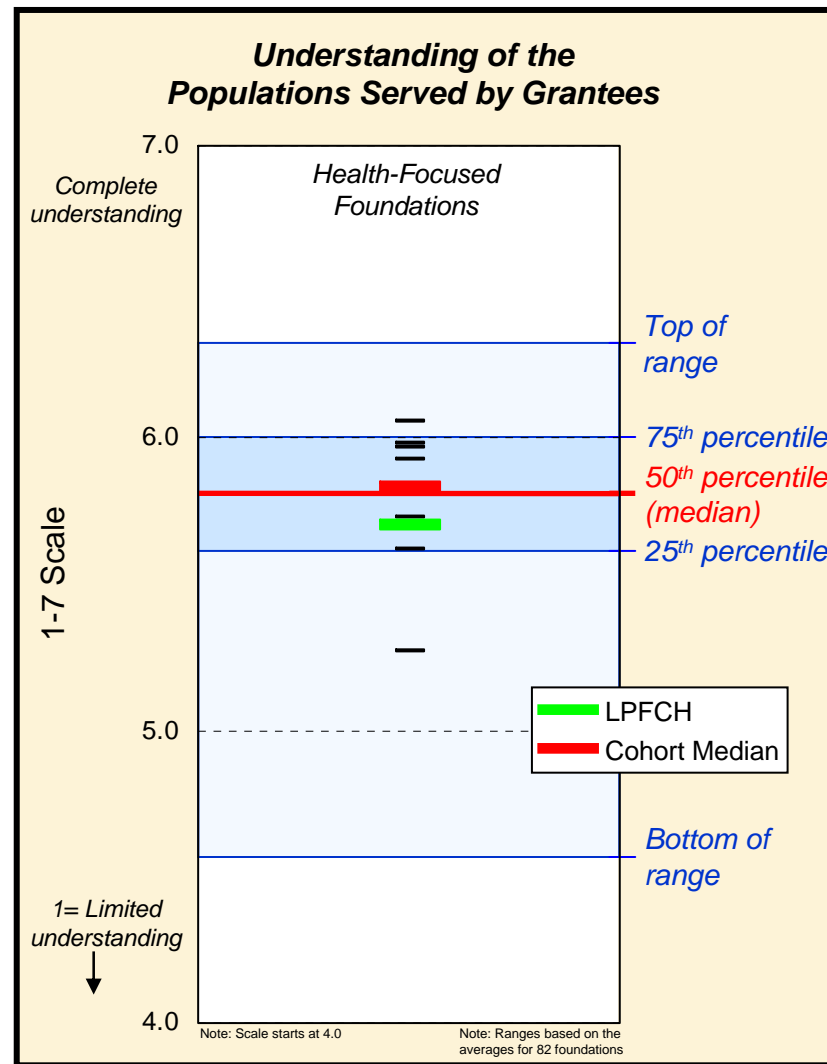
Understanding of Grantees' Goals and Strategies

LPFCH grantees rate the Foundation's understanding of their organizations' goals and strategies below the rating received by the median foundation, and at the rating received by the median health-focused foundation.



Understanding of the Populations Served by Grantees

LPFCH grantees rate the Foundation's understanding of the population(s) served by the grantee below the rating received by the median foundation.

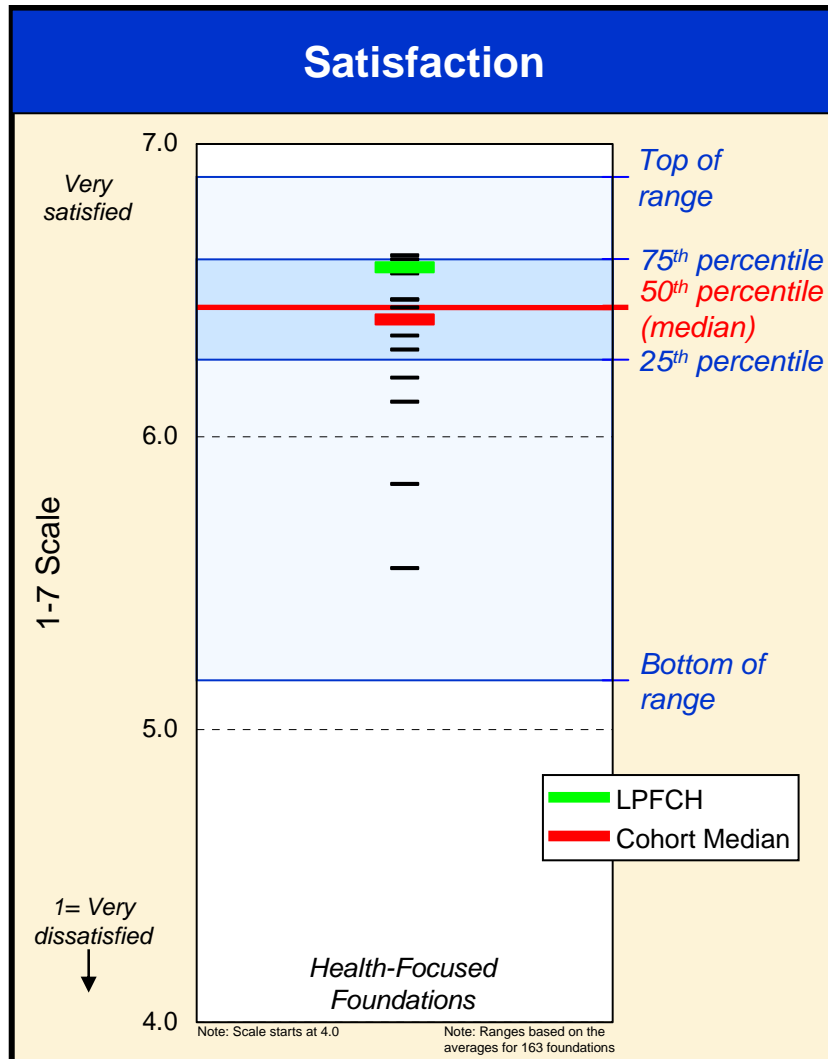


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Satisfaction with the Foundation

LPFCH grantees are more satisfied with their experience with the Foundation than grantees of the median foundation.



Grantee Comments on Overall Satisfaction

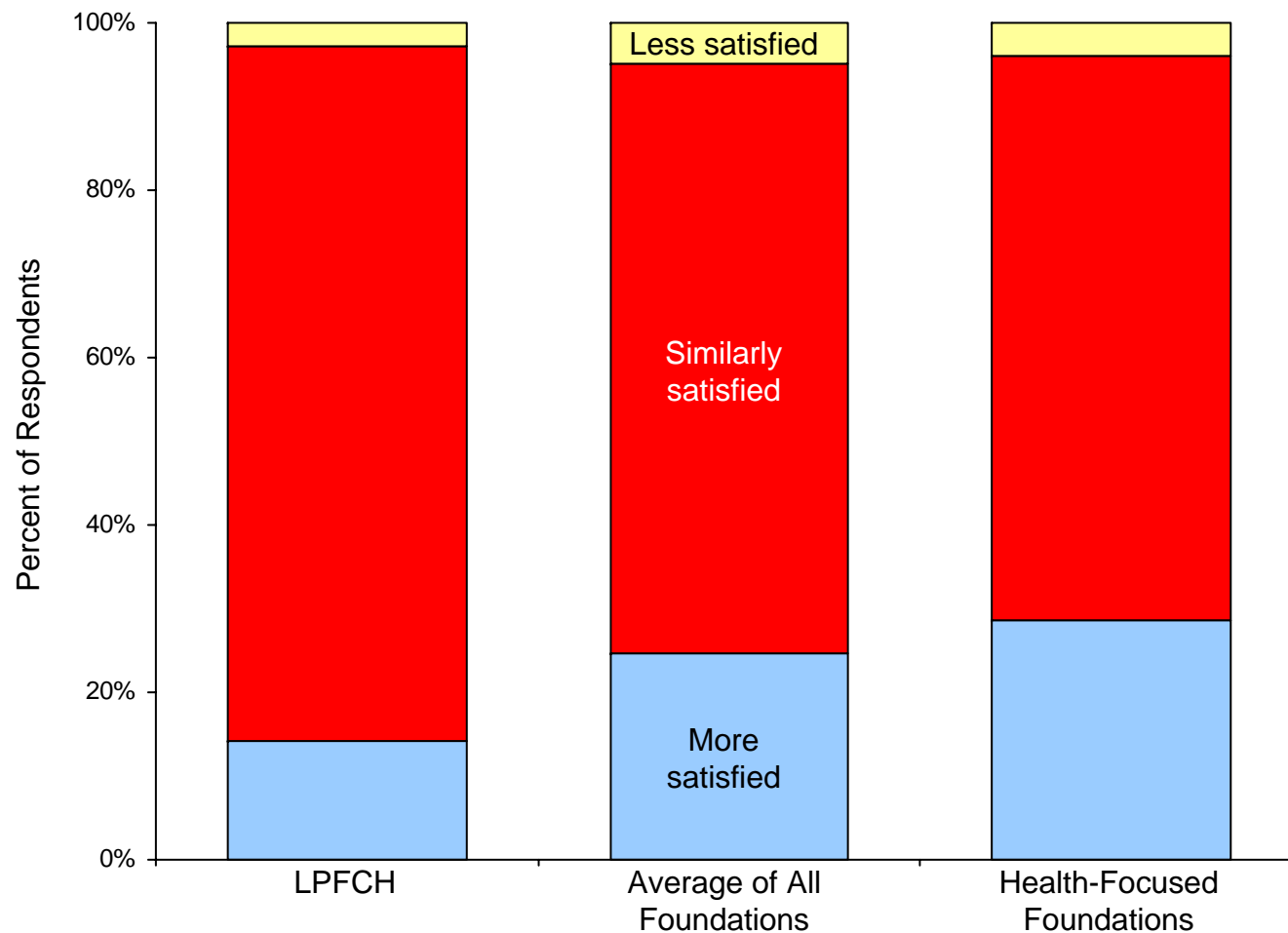
- ♦ *“The quality of the Foundation’s operations, processes, interactions, and communications are superior. I think of LPFCH as a model funder and true funding partner. The Foundation has proven time and again that it is willing to work with agencies to best meet the needs of children and families in our communities.”*
- ♦ *“[LPFCH] is an exceptional foundation. I wish every foundation we worked with was committed to the same level of accountability, communication, and competence.”*
- ♦ *“We have found the Foundation to be extremely helpful. Communications are clear and consistent. Expectations and processes are outlined in advance, and are reasonable. The staff is very people friendly, accessible, and have been willing to go the extra mile to assist in resolving issues or concerns.”*

Survey-wide Analysis Fact: Three dimensions best predict grantee perceptions of satisfaction with their foundation funders: 1) *Quality of Interactions with Foundation Staff:* fairness, responsiveness, approachability; 2) *Clarity of Communications of a Foundation’s Goals and Strategy:* clear and consistent articulation of objectives; 3) *Expertise and External Orientation of the Foundation:* understanding of fields and communities of funding and ability to advance knowledge and affect public policy. For more on these findings and resulting management implications, please see CEP’s report, *Listening to Grantees: What Nonprofits Value in Their Foundation Funders.*

Satisfaction Relative to Last Year

The majority of LPFCH grantees report that they are “similarly satisfied” with the Foundation as they were last year, although a smaller group than typical report that they are “more satisfied.”

Change in Satisfaction with the Foundation from Last Year



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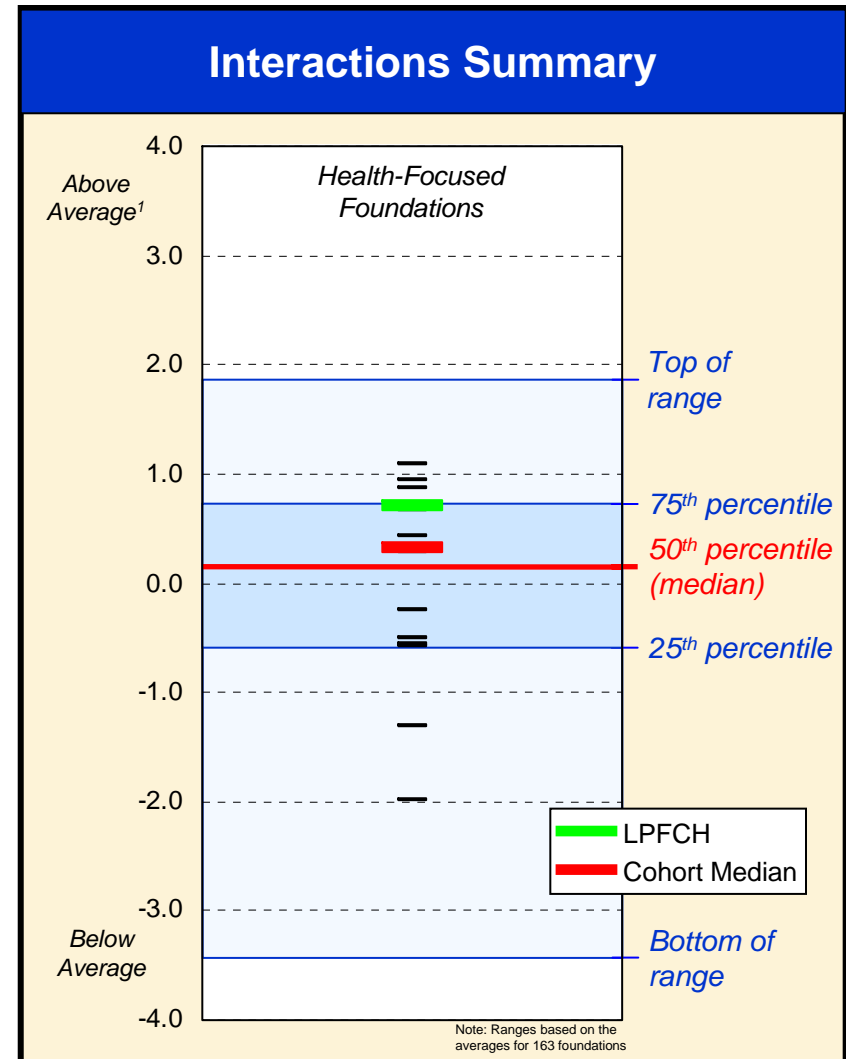
Grantee Interactions Summary

The Grantee Interactions Summary describes grantees' perceptions of their interactions with foundations.

- ◆ Grantees rate LPFCH staff more positively than the median foundation is rated by its grantees in terms of the quality of interactions with the Foundation.

This composite measure includes:

- How comfortable grantees feel approaching the Foundation if a problem arises
- Overall responsiveness of the Foundation staff
- Overall fairness of the Foundation's treatment of grantees

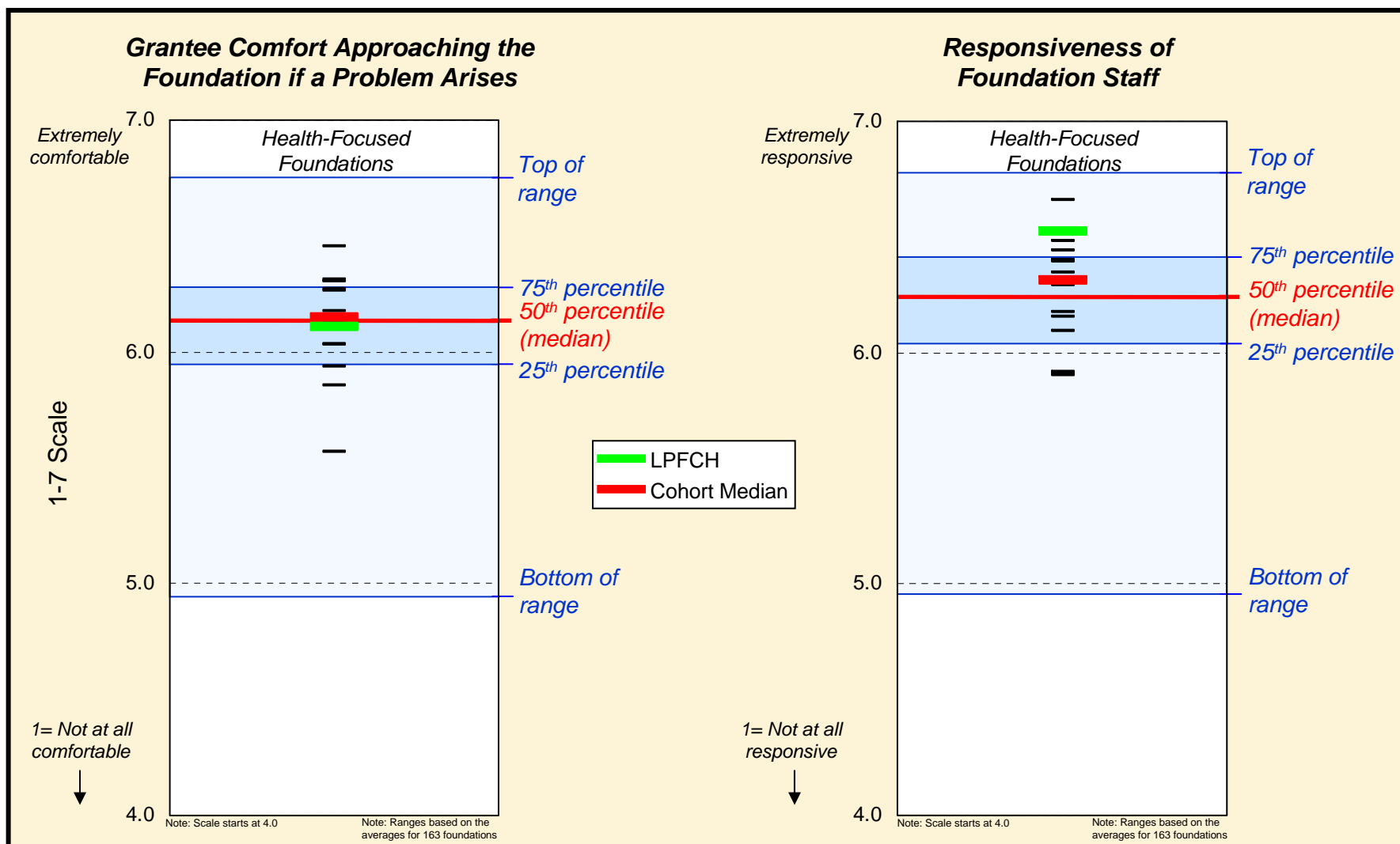


Note: Index created using factor analysis, a statistical technique useful in aggregating separate rating questions into one "rating" that represents the combination of unique variation from the inputs.

1: Each unit in the summary graph is one standard deviation.

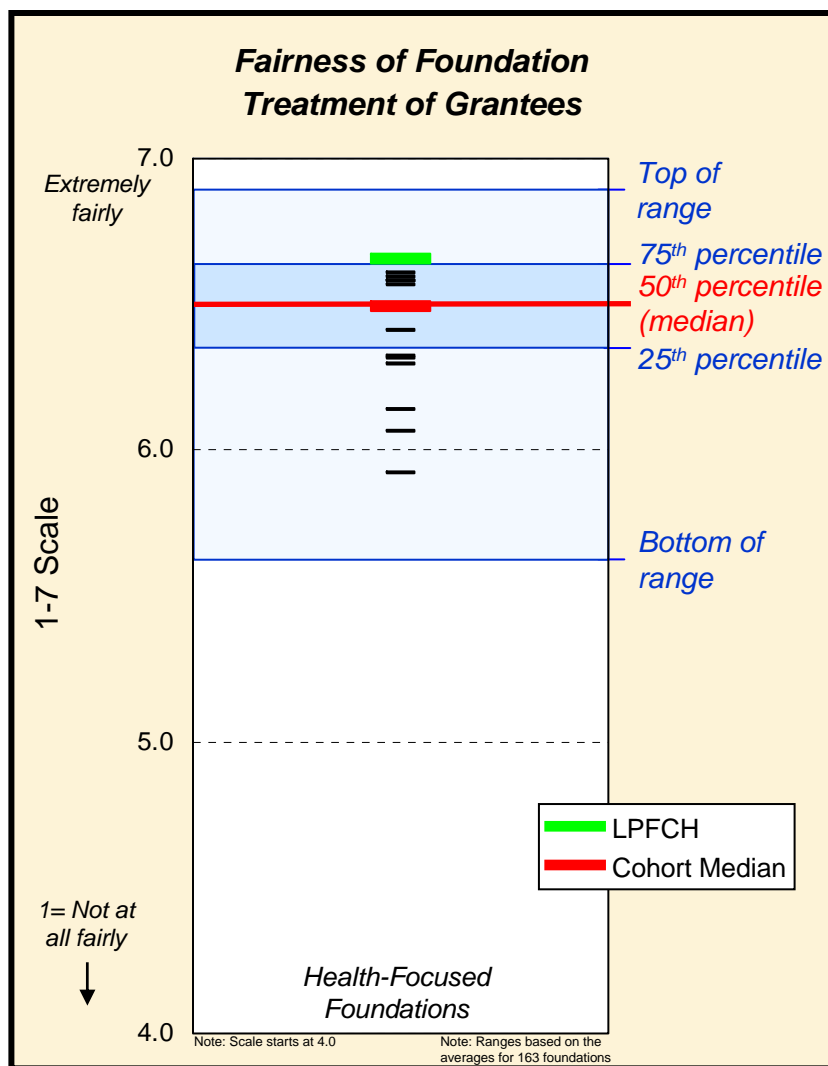
Interactions Measures (1)

LPFCH grantees rate the Foundation as positively as the median foundation is rated by its grantees in terms of *comfort in approaching the Foundation if a problem arises* and substantially more positively than the median foundation in the *responsiveness of Foundation staff*.



Interactions Measures (2)

LPFCH grantees rate the Foundation more positively than the median foundation is rated by its grantees in fairness of treatment of grantees.



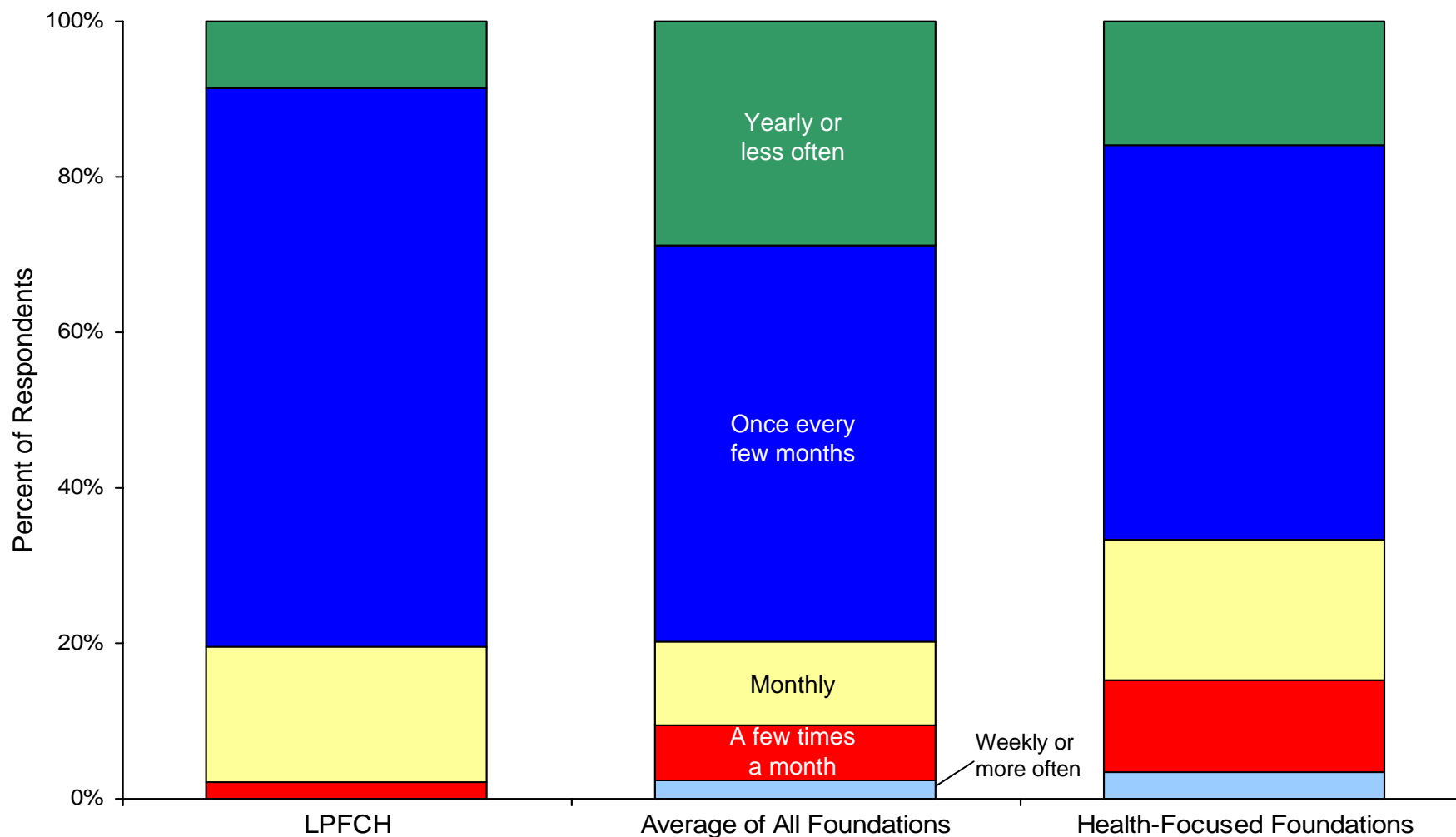
Grantee Comments on Interactions

- ◆ “[Our program officer] has been an invaluable resource, and we appreciate the intelligence, thought, and care she brings to her work.”
- ◆ “We love [our program officer]; she is supportive, clear, and responsive.”
- ◆ “Foundation staff were very helpful, constructively challenging, well-informed, and very thoughtful in doing due diligence.”
- ◆ “Foundation staff was very responsive and supportive at every stage of the process.”
- ◆ “The interactions I have had with the Foundation have been very positive. We do not have a lot of contact with them once the program is funded – this has been my experience over several grants received from them.”
- ◆ “I feel very fortunate to have such an open communication line between me and our monitor. She is easy to talk to and very helpful.”

Frequency of Interactions

The majority of LPFCH grantees report interacting with their program officer once every few months or more frequently.

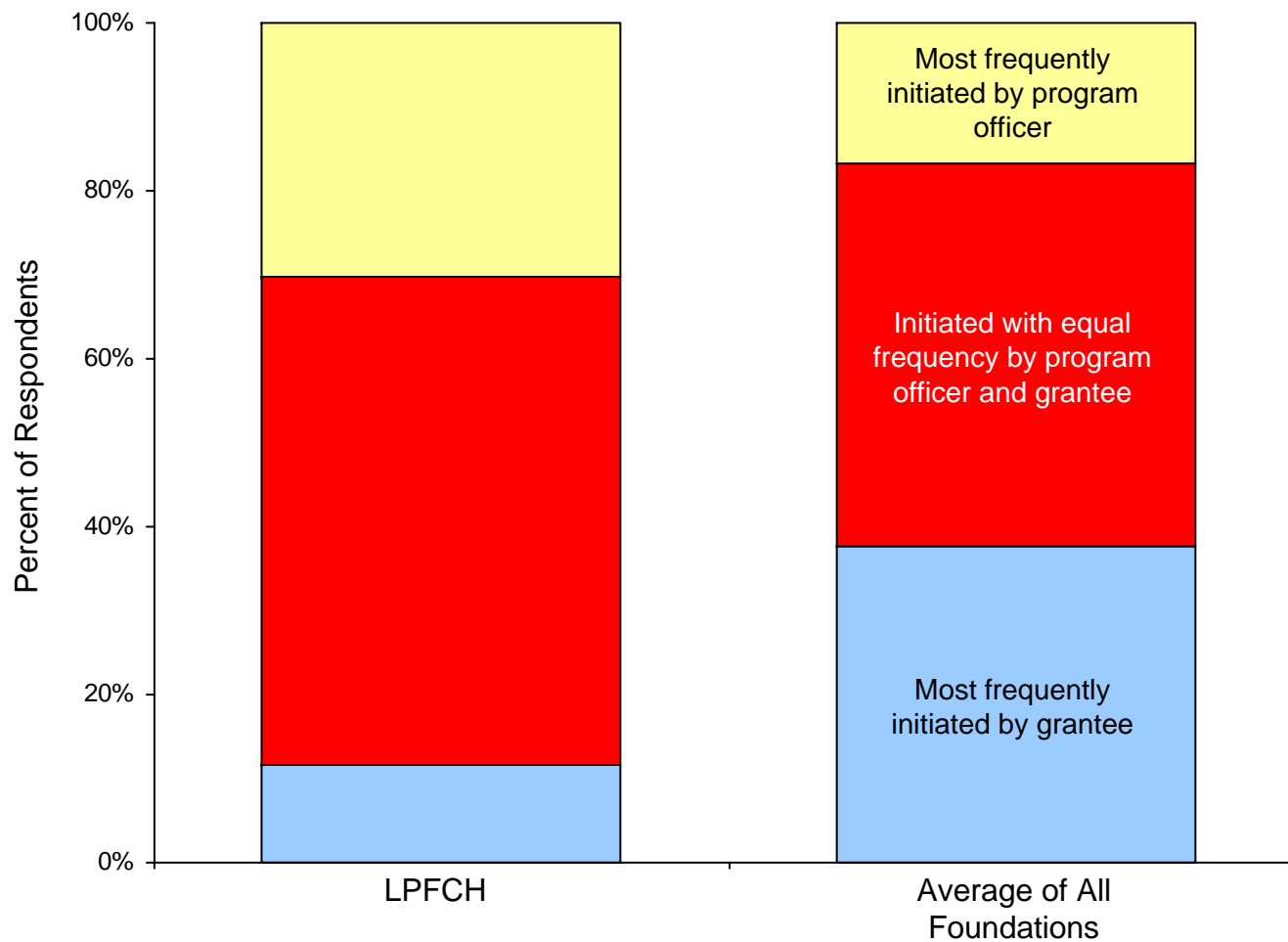
Frequency of Grantee Contact with Program Officers During Grant



Initiation of Interactions

A larger than typical proportion of LPFCH grantees report that interactions with Foundation staff were initiated by their program officer.

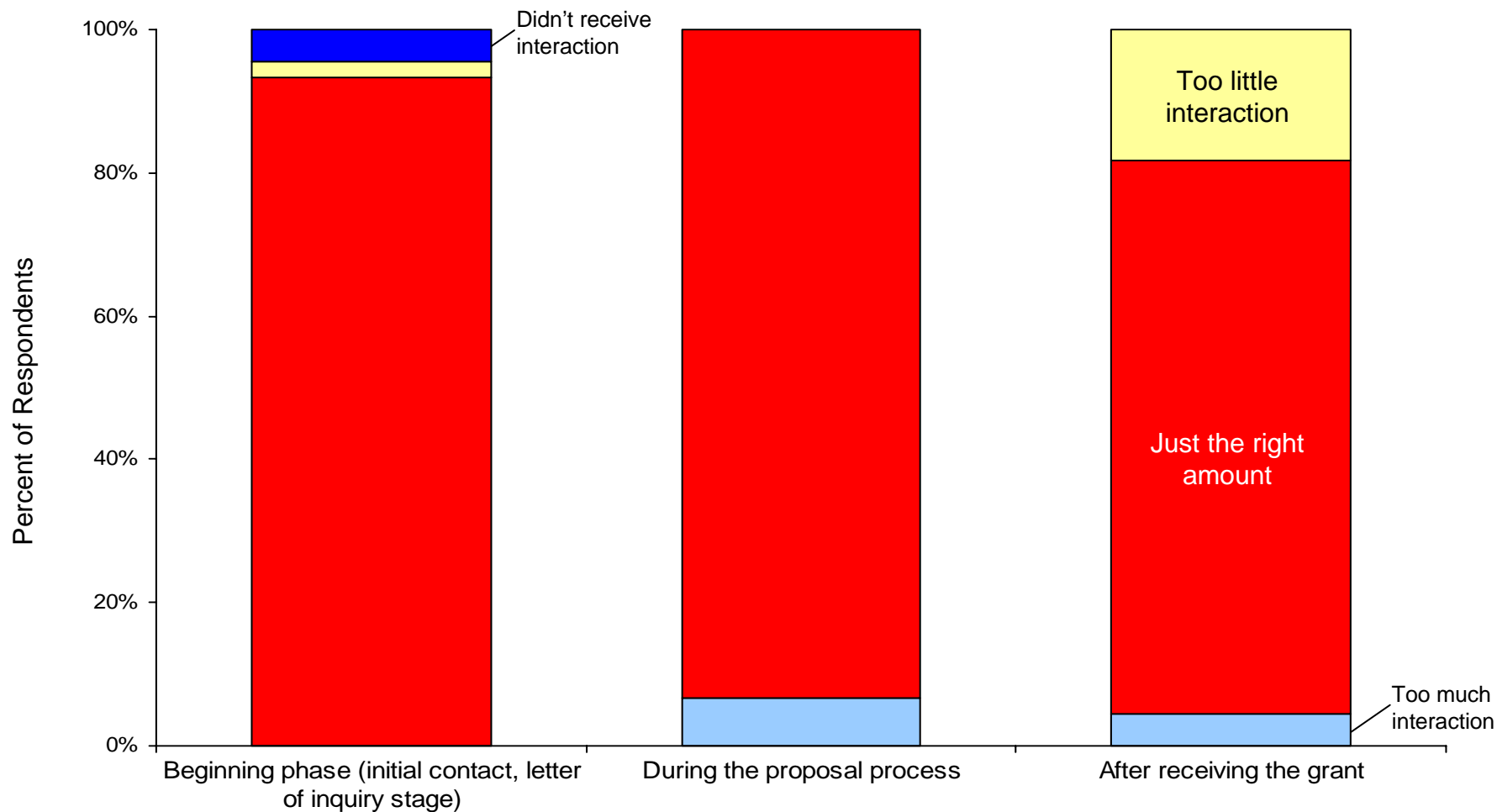
Initiation of Grantee Contact with Program Officers During Grant



Level of Foundation Interaction Throughout Grant Process

The majority of LPFCH grantees report that the level of Foundation interaction they experienced was “just the right amount” at different phases of the grant process, although 18 percent of grantees report receiving “too little interaction” after receiving their grants.

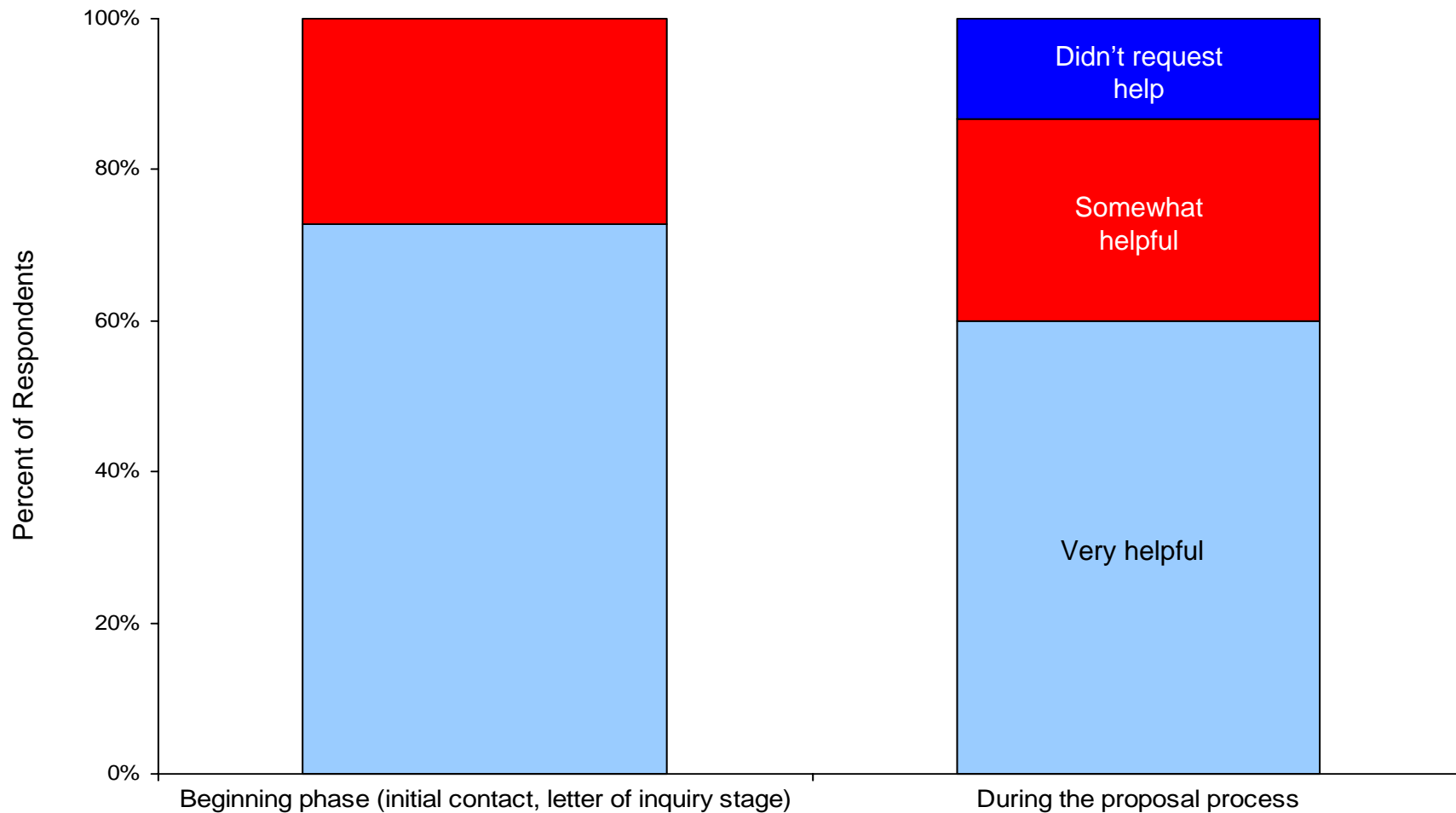
“Please indicate the level of Foundation interaction you experienced at different phases of the grant process.”



Helpfulness of Foundation Interaction Throughout Grant Process

The majority of LPFCH grantees report that interactions with the Foundation were “very helpful” at different phases of the grant process.

“Please indicate the helpfulness of Foundation interaction you experienced at different phases of the grant process.”

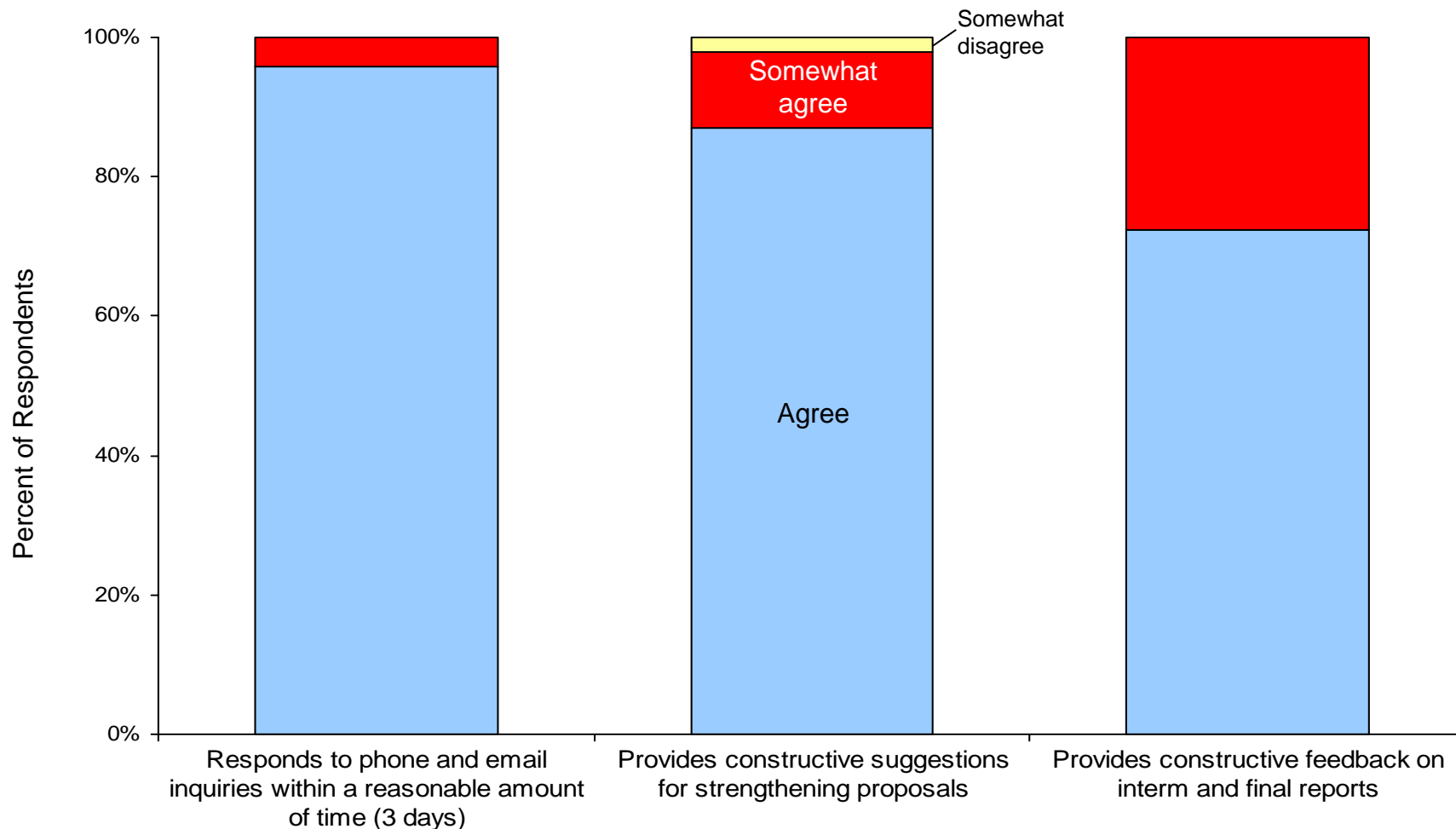


Note: This custom question was only asked of LPFCH grantees. The question had five possible answer choices: “very helpful,” “somewhat helpful,” “not at all helpful,” “didn’t request help,” and “don’t know.” No grantees responded “not at all helpful.”

Helpfulness of Foundation Staff

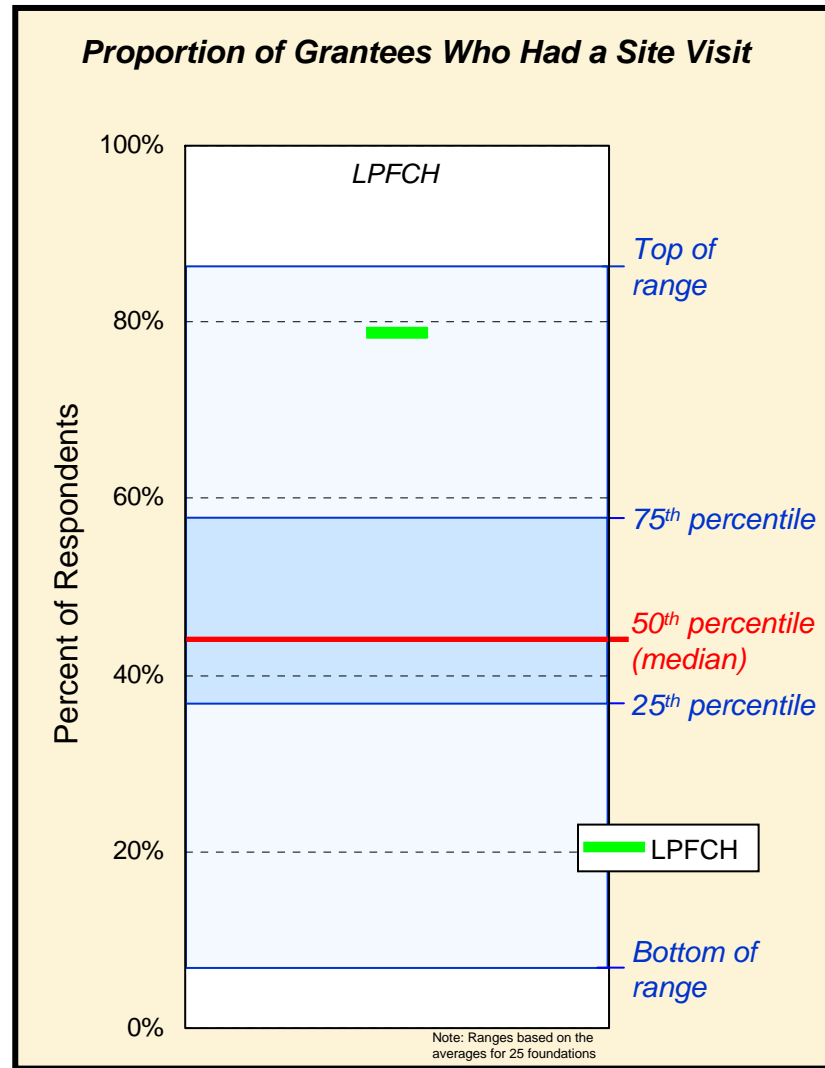
The majority of LPFCH grantees report that Foundation staff are responsive to phone and email inquiries and provide constructive suggestions on the proposal and feedback on interim and final reports.

“Please indicate your level of agreement with the following statements.”



Proportion of Grantees Who Had a Site Visit

LPFCH conducts site visits to a substantially larger proportion of its grantees than is typical.

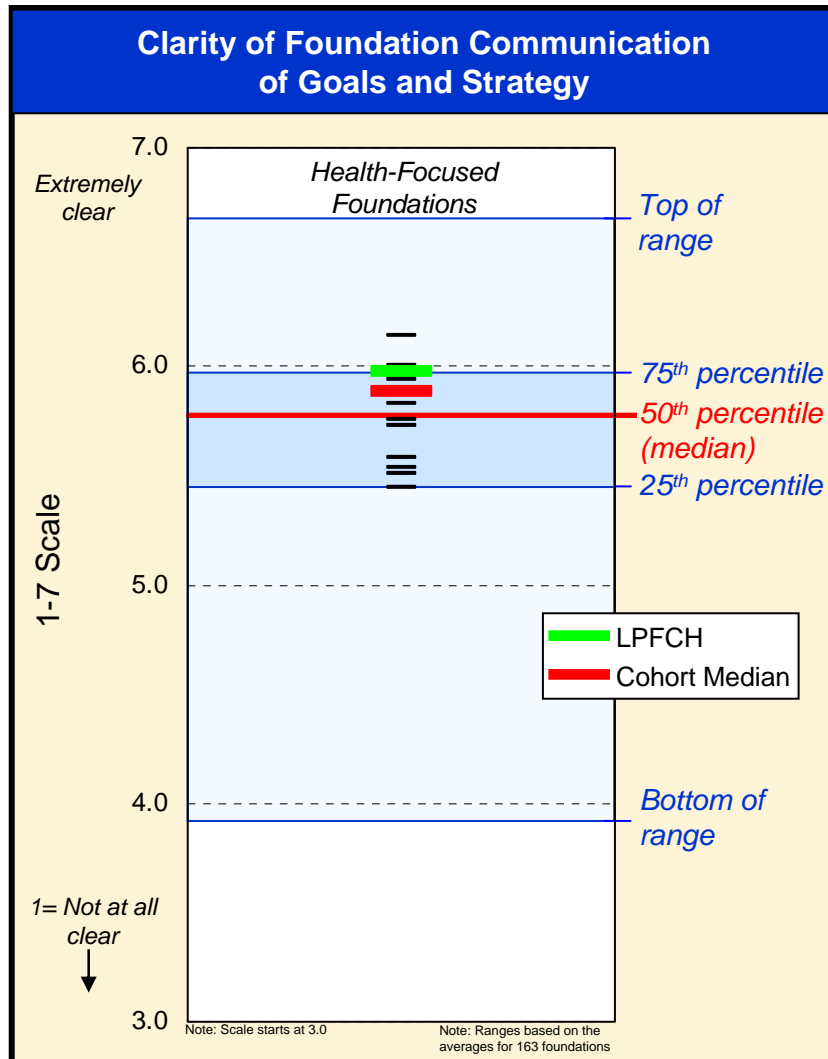


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Communication of Goals and Strategy

LPFCH grantees rate the Foundation's clarity of communication of its goals and strategy above the rating of the median foundation.

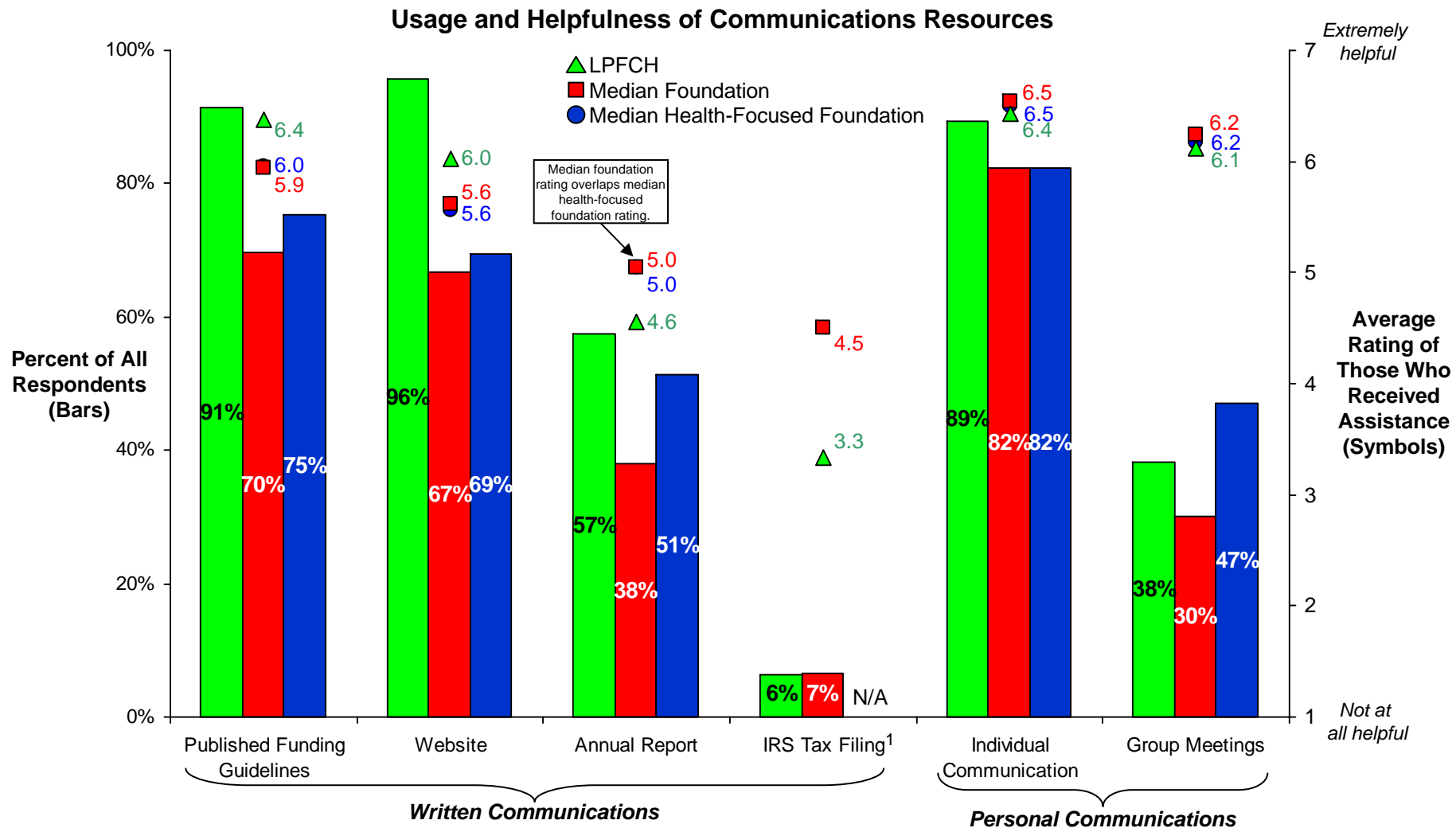


Grantee Comments on Clarity of Communications

- ◆ *“We've been consistently pleased with the helpfulness and straightforward approach Foundation staff have taken in communicating with us. The process of applying for a grant is very clearly outlined on the website, and the Foundation has also regularly provided additional resources.”*
- ◆ *“To me, the communication offered by the Foundation's staff is the most valuable asset. They are always there to answer questions or get back to you within a day if something needs research. Our primary means of communication was by email.”*
- ◆ *“The individual contact with LPFCH was excellent, and the written information was good as well. But, it was most helpful to have clarification and some expanded understanding of the written information.”*
- ◆ *“There is always clarity and a willingness to answer any questions that might arise.”*

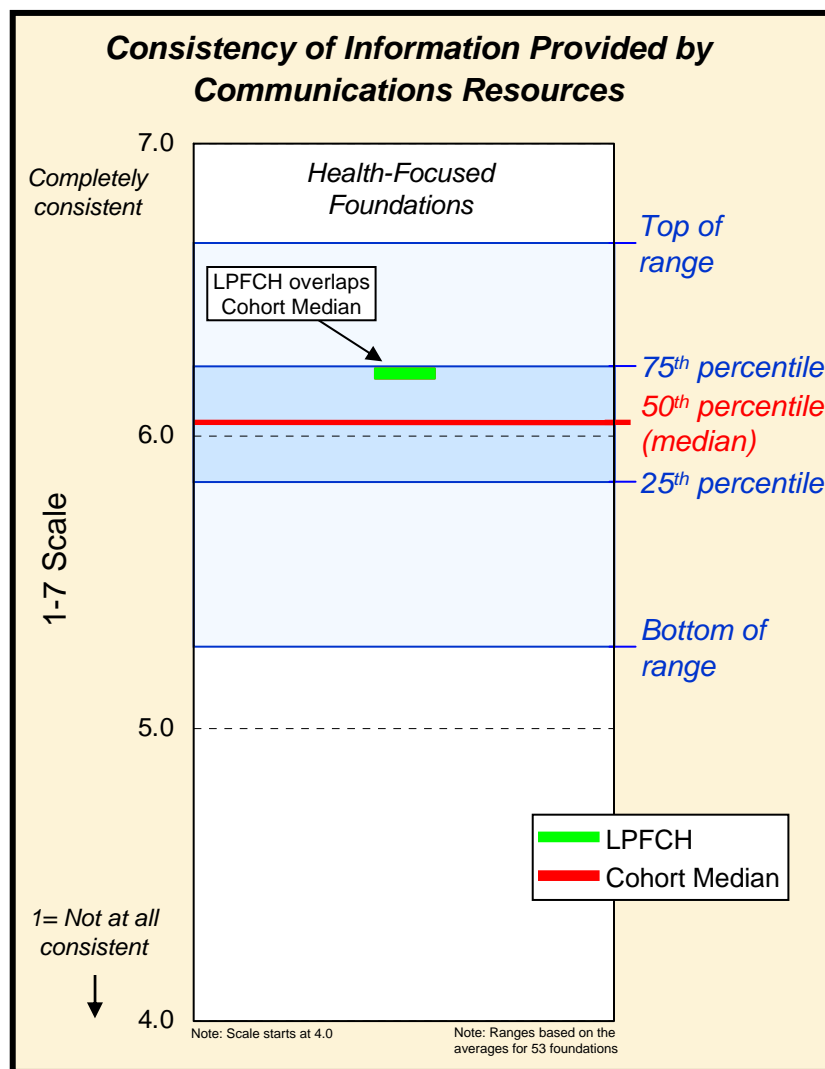
Communications Resources

LPFCH grantees are more likely than grantees of other foundations to utilize both the Foundation's written and personal communications resources when learning about the Foundation. LPFCH's communications resources are seen to vary in their helpfulness relative to the communications resources of the median foundation.



Consistency of Communications

LPFCH grantees rate the Foundation’s written and personal communications as more consistent than the communications resources of the median foundation, and as consistent as the communications resources of the median health-focused foundation.



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Non-Monetary Assistance Summary

The Non-Monetary Assistance Summary describes the frequency and value of a foundation's provision of assistance beyond the grant check.

- ◆ *LPFCH is above the median foundation on this measure, and similarly rated to the median health-focused foundation.*

Non-Monetary Assistance Activities Included in Summary

MANAGEMENT ASSISTANCE

- General management advice
- Strategic planning advice
- Financial planning/accounting
- Development of performance measures

FIELD-RELATED ASSISTANCE

- Encouraged/facilitated collaboration
- Insight and advice on your field
- Introductions to leaders in field
- Provided research or best practices
- Provided seminars/ forums/ convenings

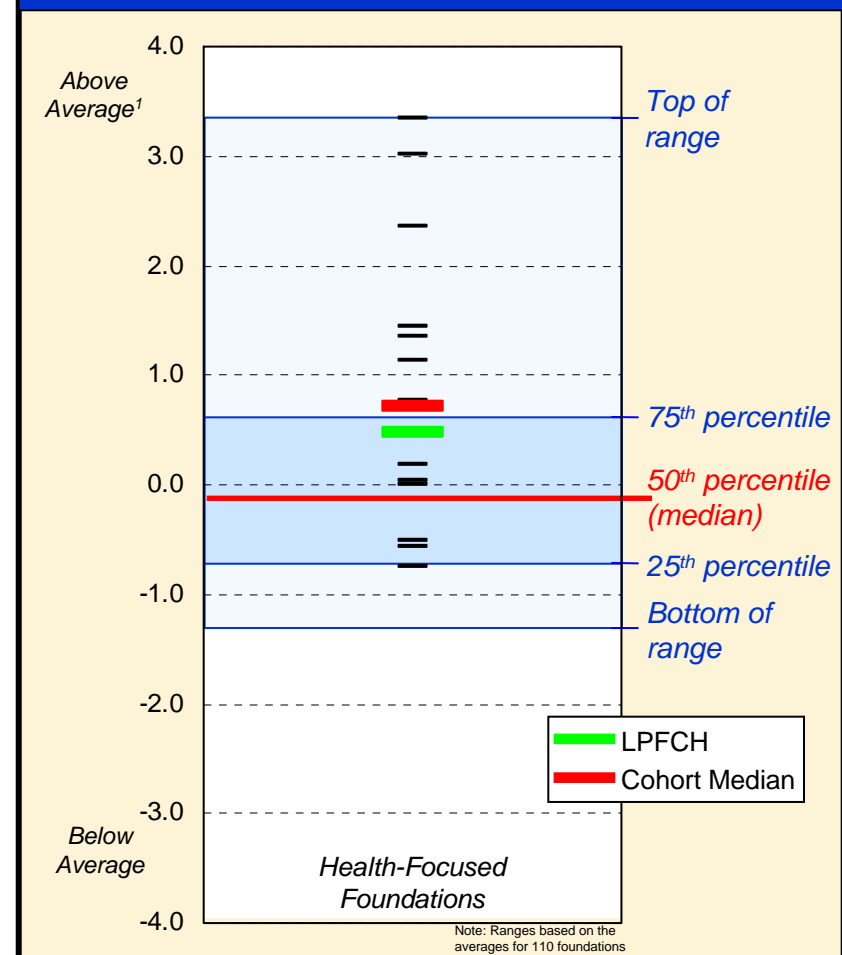
OTHER ASSISTANCE

- Board development/ governance assistance
- Information technology assistance
- Communications/ marketing/ publicity assistance
- Use of Foundation facilities
- Staff/management training

This composite measure includes:

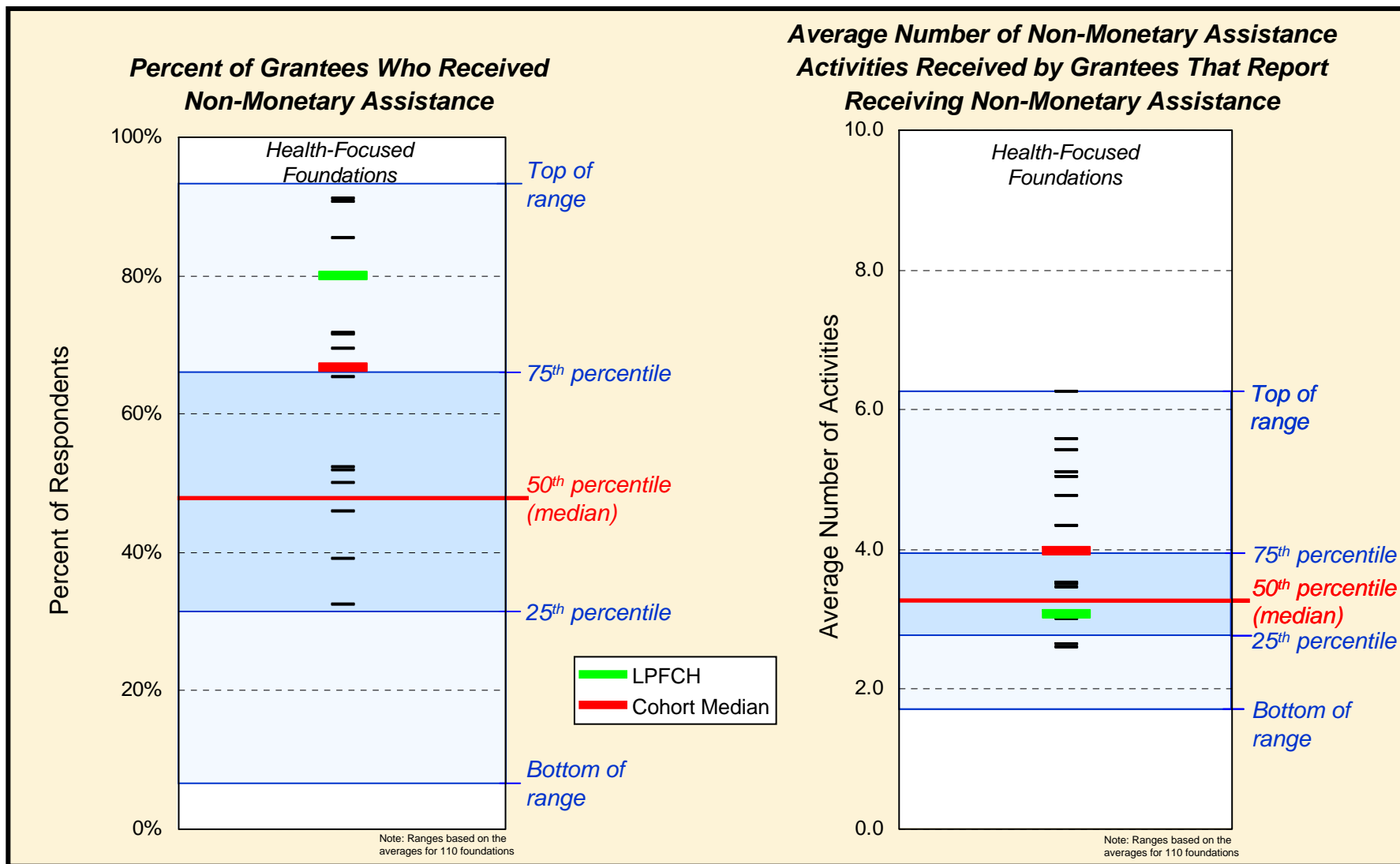
- *Whether grantees received individual assistance activities from the foundation or third parties*
- *Ratings of helpfulness of assistance activities*

Non-Monetary Assistance Summary



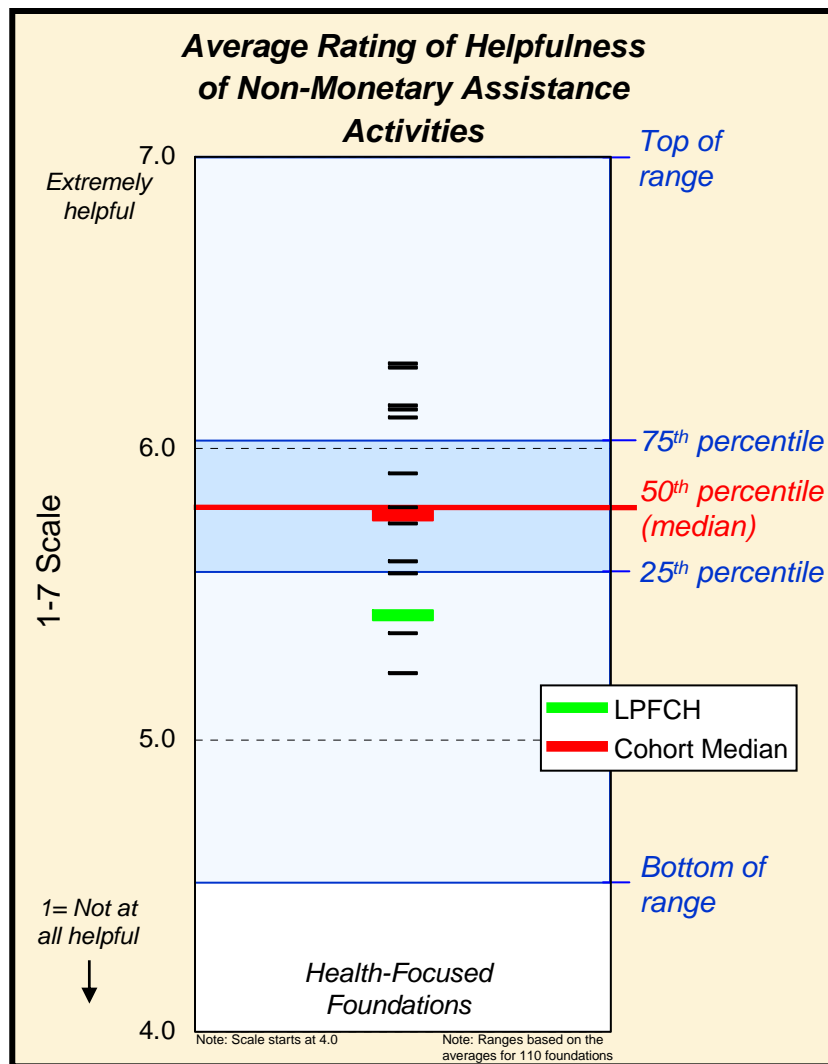
Non-Monetary Assistance (1)

80 percent of LPFCH grantees report receiving non-monetary assistance, a substantially higher proportion than is typical. On average, LPFCH grantees report receiving three discrete types of non-monetary assistance – similar to the median foundation in the sample and fewer than the median health-focused foundation.



Non-Monetary Assistance (2)

LPFCH grantees that receive non-monetary assistance rate assistance activities to be substantially less helpful than the assistance provided by the median foundation.

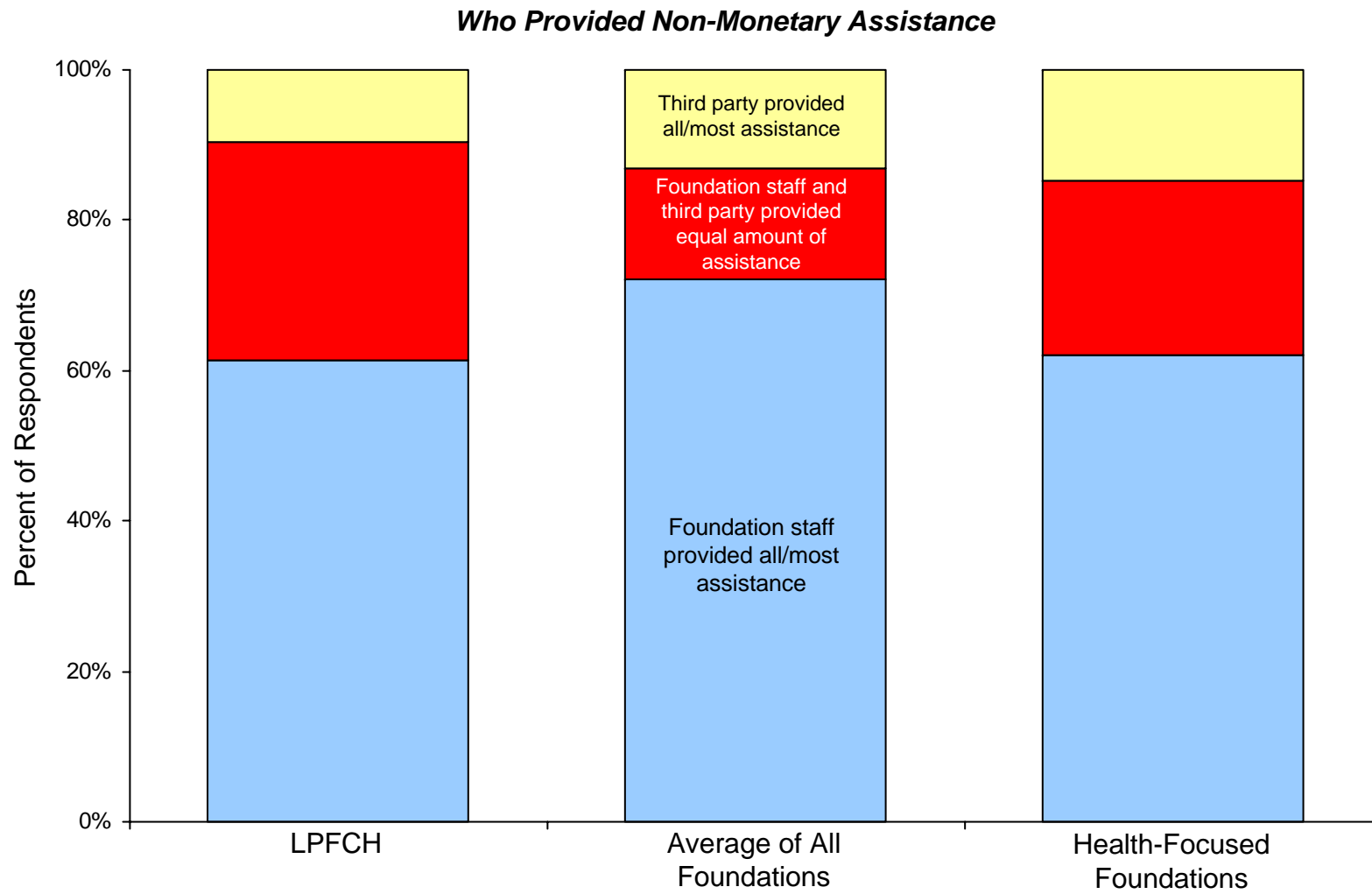


Grantee Comments on Non-Monetary Assistance

- ◆ “There were two seminars offered to Foundation grantees. One was not very helpful. The other gave more of an opportunity to connect with other non-profit providers, which was definitely more helpful.”
- ◆ “The non-monetary assistance we received was mostly in the form of help / advice / introductions / referrals from staff. [Our program officer] went the extra mile to help us grow and strengthen our position – her questions/requests were at times challenging, but they helped us become stronger. We really appreciate that.”
- ◆ “[The] Foundation has gone beyond merely providing funds to partnering in research, dissemination of best practices, and community assessment.”
- ◆ “[The Foundation] provided a grant to an organization that will train my staff and board on evaluations and outcomes.”
- ◆ “The gatherings have provided an opportunity for collaboration as well as access to expertise that we would not otherwise have been able to afford.”

Who Provided Non-Monetary Assistance

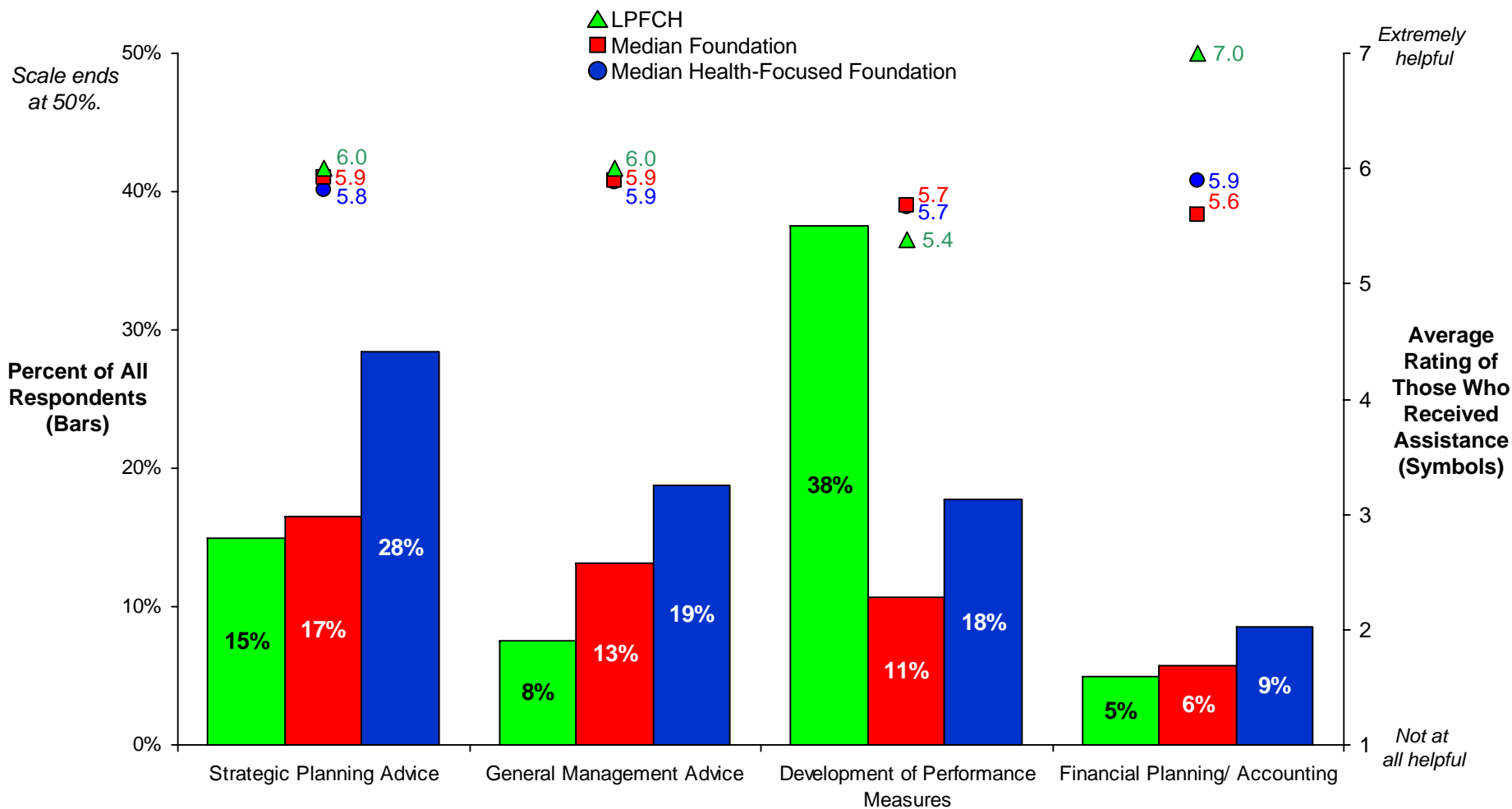
Thirty-nine percent of LPFCH grantees that receive non-monetary assistance identify a third party as a provider of this assistance – a larger than typical proportion compared to other foundations, and consistent with that of other health-focused foundations.



Management Assistance Activities & Helpfulness

A larger than typical proportion of LPFCH grantees report receiving assistance in development of performance measures, and the helpfulness of this assistance is rated below the median. The helpfulness of other management assistance activities is seen to vary relative to the ratings of the median foundation.

Frequency and Helpfulness of Management Assistance Activities

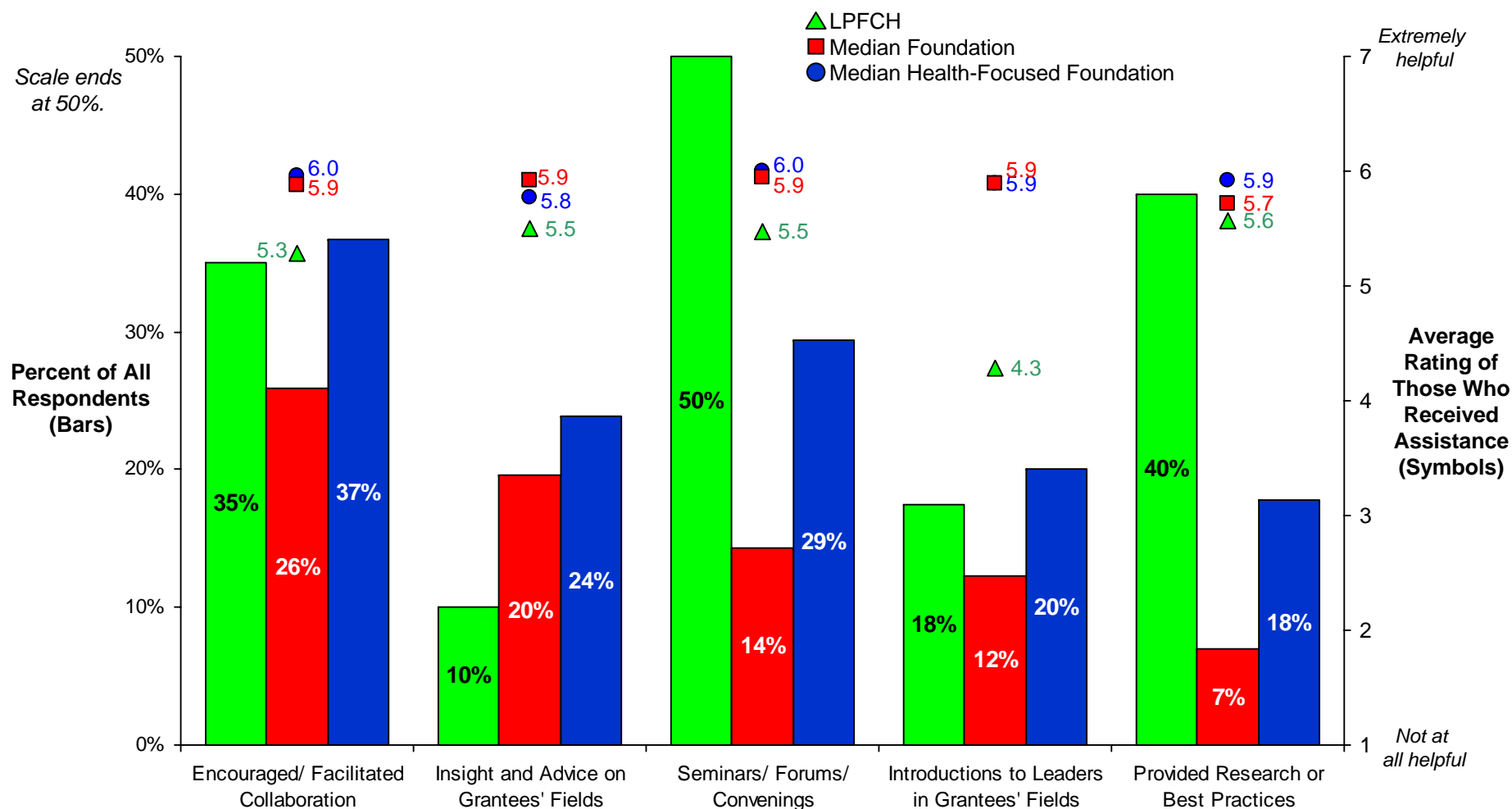


Note: Percent of grantees receiving non-monetary assistance is an overall percentage including those who answered that they did not receive assistance from the foundation. This chart includes data about 110 foundations.

Field-Related Assistance Activities & Helpfulness

A larger than typical proportion of LPFCH grantees report receiving field-related assistance activities, with the exception of insight and advice on grantees' fields. The helpfulness of these activities is rated less positively than the activities provided by the median foundation.

Frequency and Helpfulness of Field-Related Assistance Activities

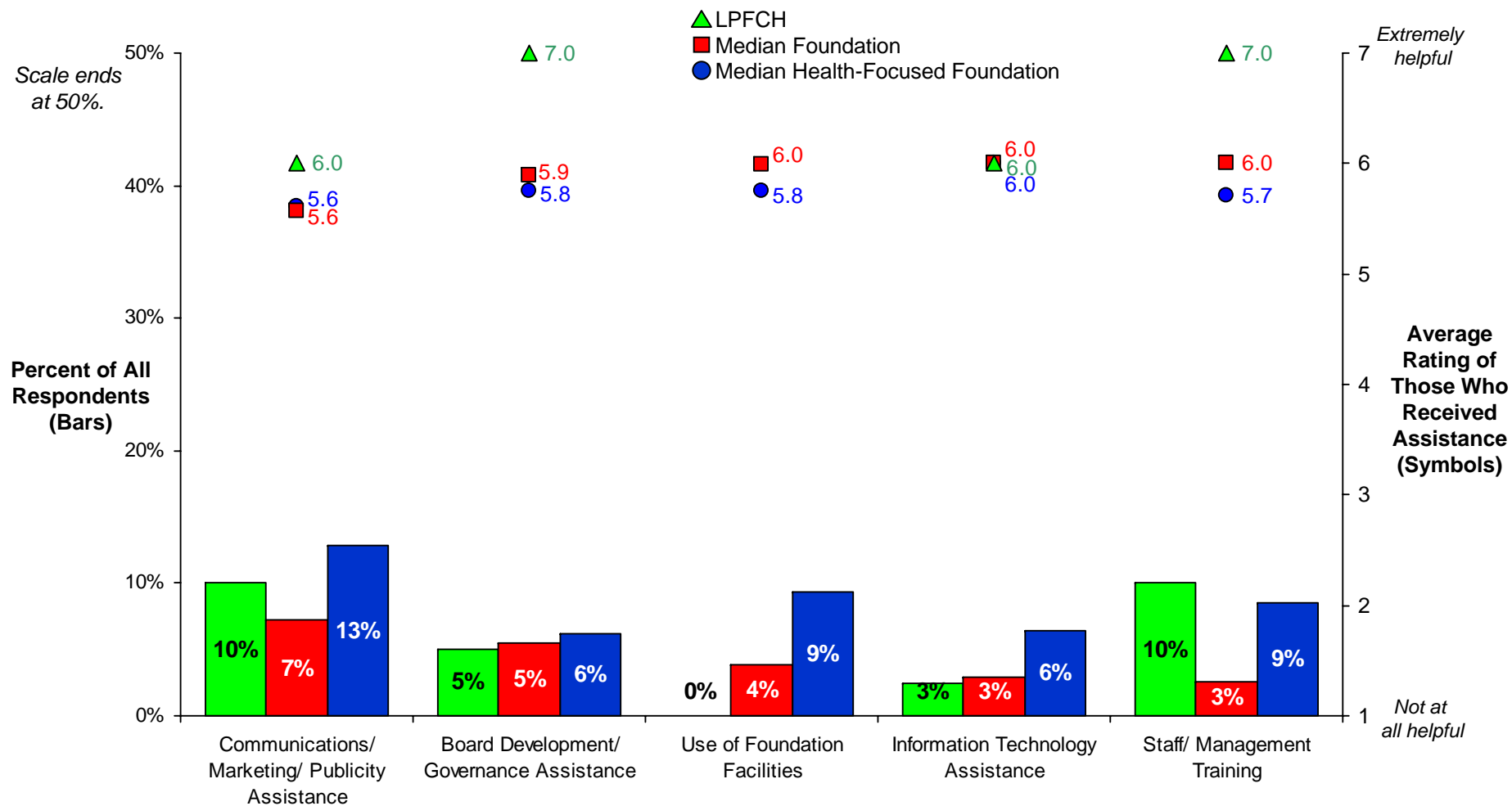


Note: Percent of grantees receiving non-monetary assistance is an overall percentage including those who answered that they did not receive assistance from the foundation. This chart includes data about 110 foundations.

Other Support Activities & Helpfulness

Like other foundations in our sample, LPFCH does not frequently provide other types of non-monetary assistance activities to its grantees.

Frequency and Helpfulness of Other Assistance Activities



Note: Percent of grantees receiving non-monetary assistance is an overall percentage including those who answered that they did not receive assistance from the foundation. This chart includes data about 110 foundations.

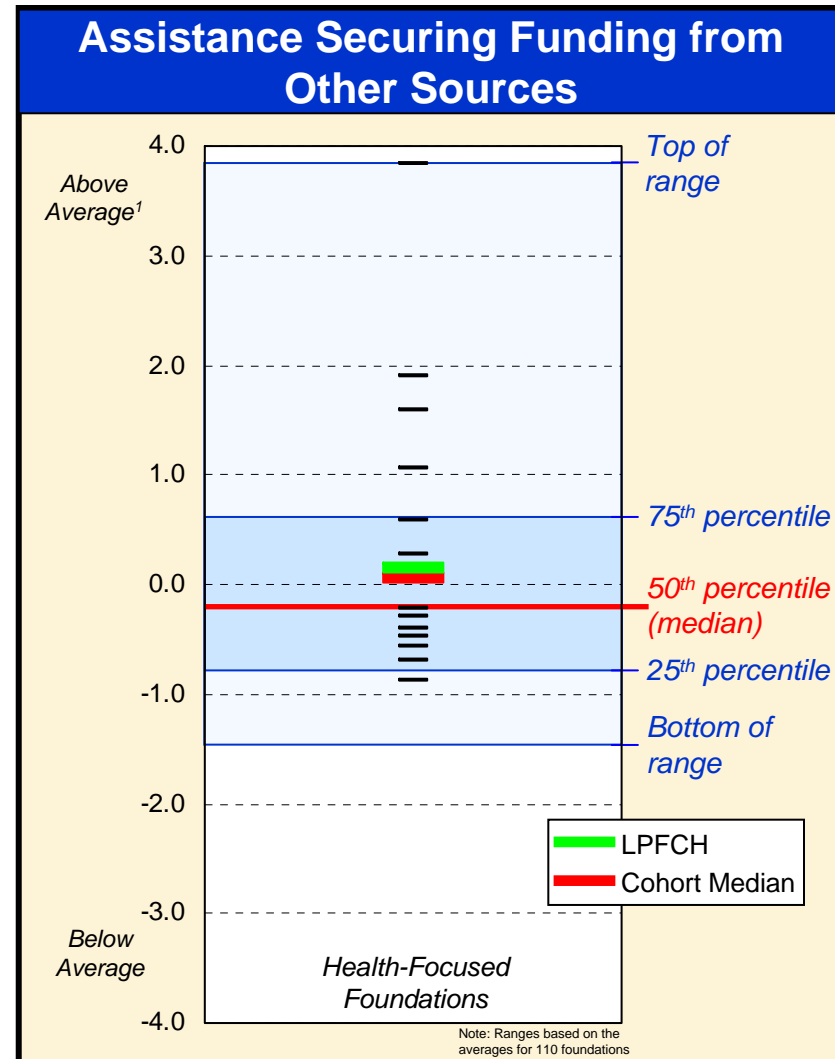
Assistance Securing Funding from Other Sources

This summary highlights grantees' perceptions of a foundation's help in grantees' efforts to secure additional funding from other sources.

- ◆ *LPFCH is rated above the median foundation on this measure, and similar to the median health-focused foundation.*

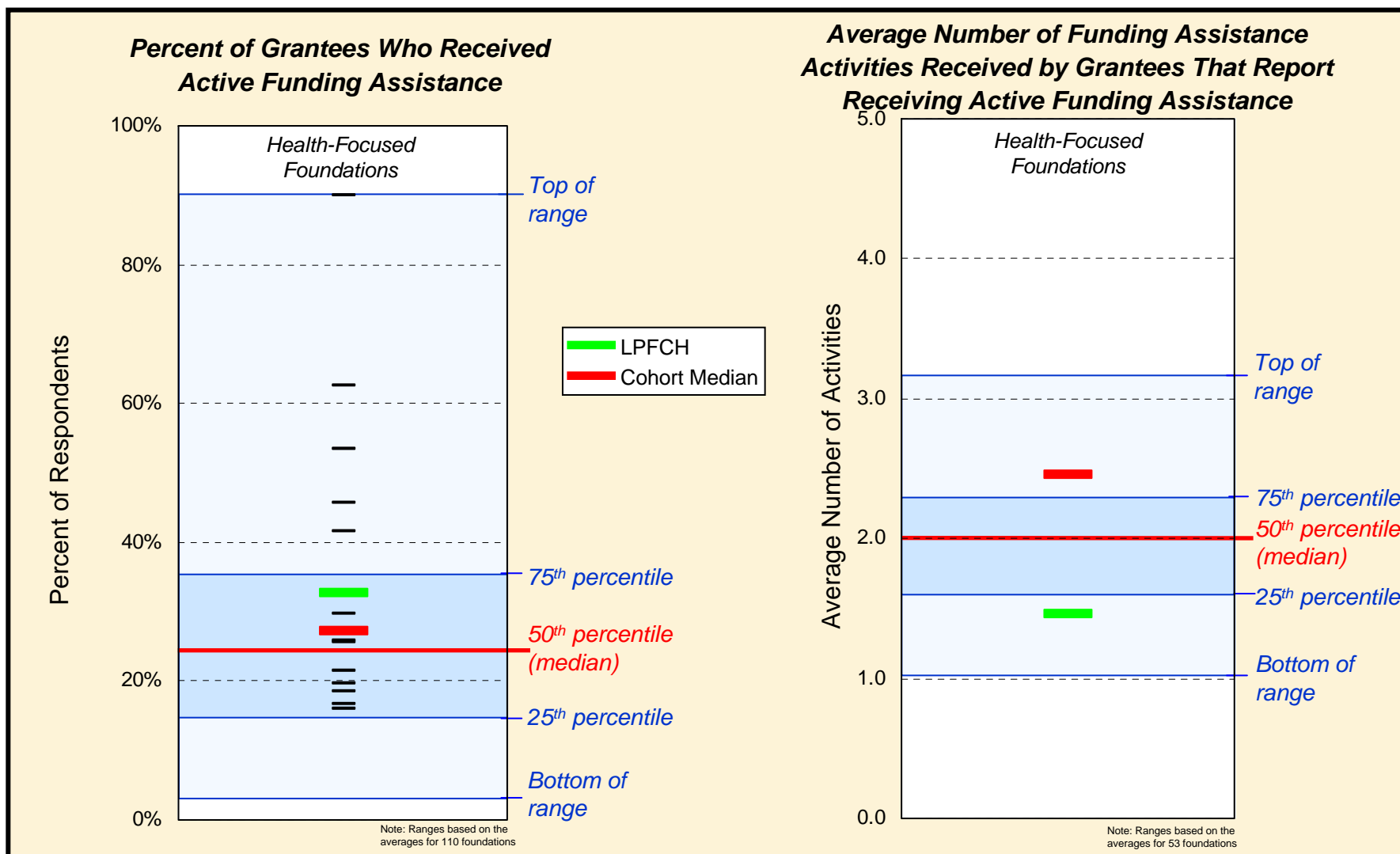
This composite measure includes:

- *Frequency of active foundation assistance in obtaining additional funding from other sources*
- *The impact of those efforts*



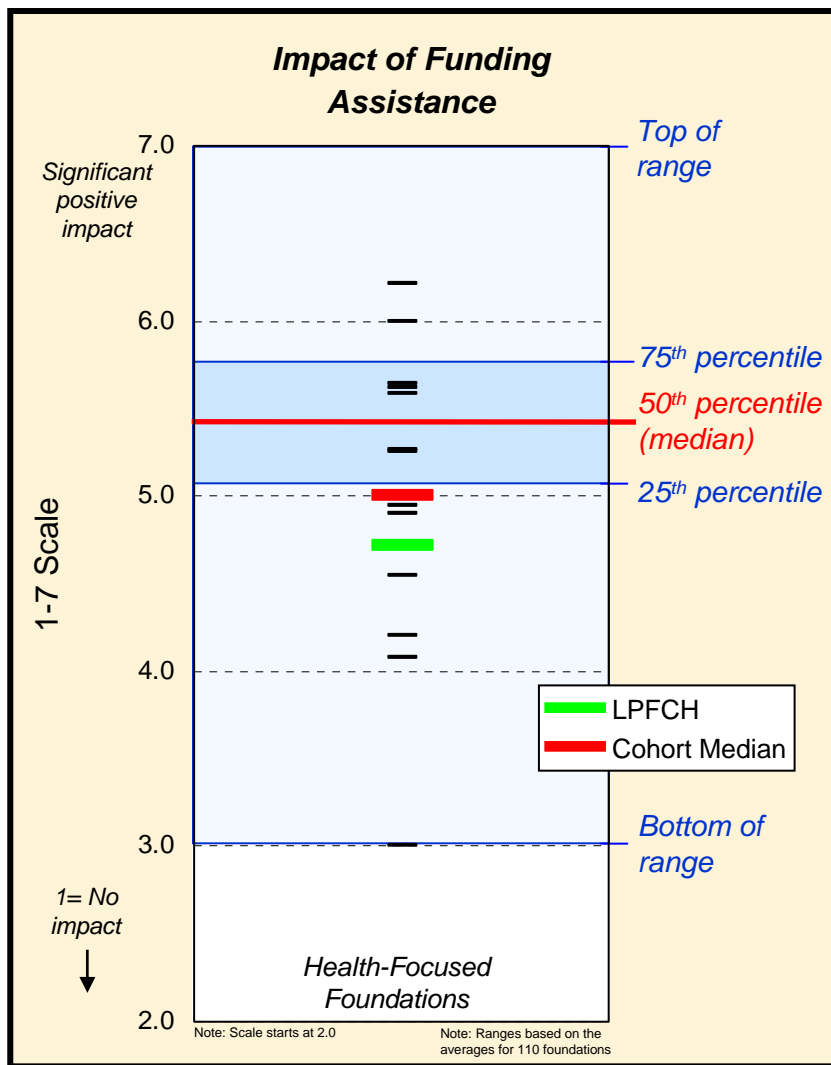
Active Help in Securing Funding from Other Sources (1)

A larger than typical proportion of LPFCH grantees report receiving active funding assistance from the Foundation. LPFCH grantees typically receive between one and two discrete types of funding assistance.



Active Help in Securing Funding from Other Sources (2) Grantee Perception Report®

LPFCH grantees rate the funding assistance provided by the Foundation as having substantially less impact than do grantees receiving funding assistance from the median foundation.



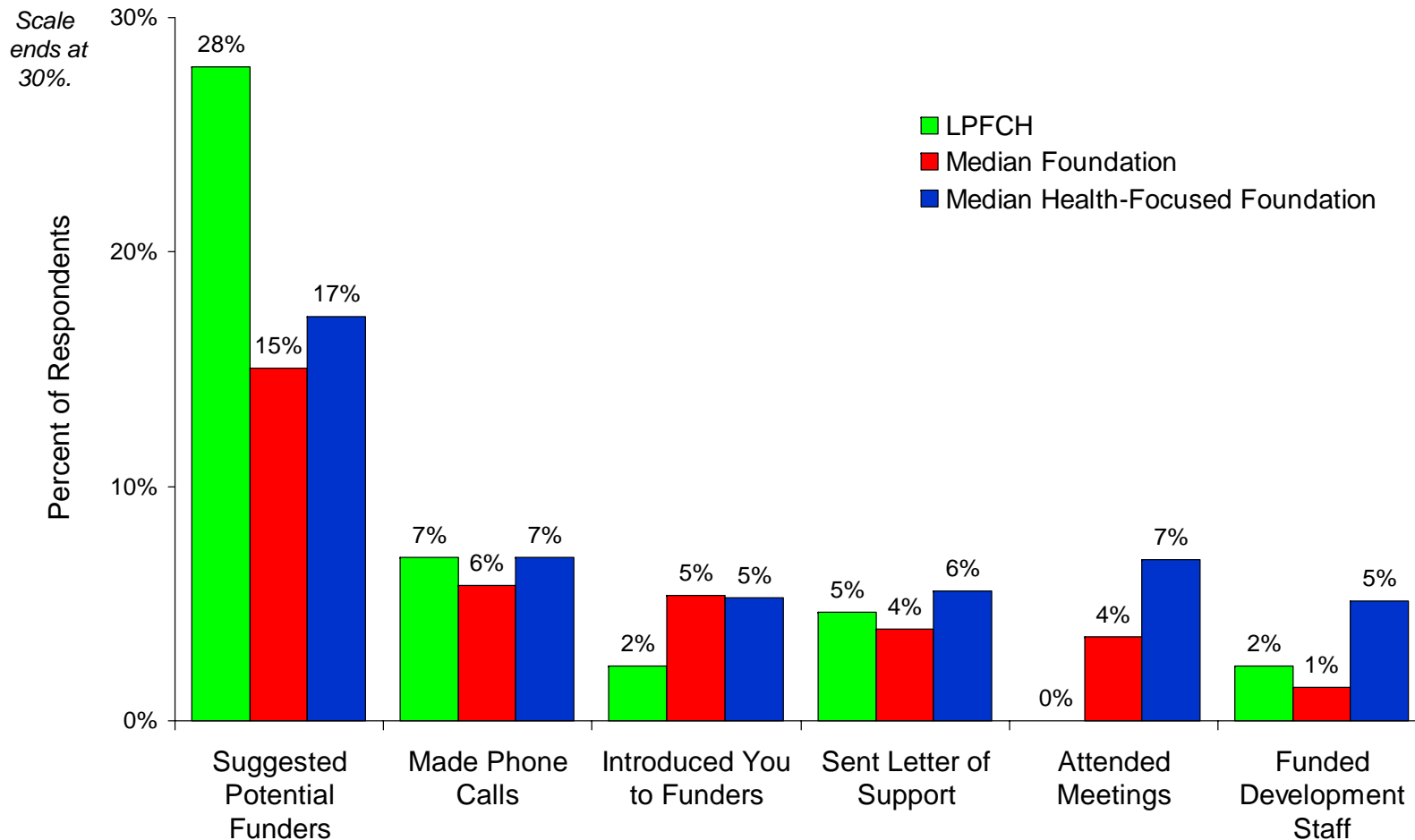
Grantee Comments on Funding Assistance

- ◆ “We use resources [provided by the Foundation] in applying for funding from other foundations/corporations. Though we have not yet received funding, we feel that use of the Foundation [resources] is very helpful and lends great credibility to our project. The Foundation's support has greatly improved our program's self-esteem and self-confidence.”
- ◆ “The support of the Foundation provided significant financial resources, as well as improved the perception of our agency [to] other potential funders — both factors have increased our long-term ability to effectively serve our clients.”
- ◆ “[Foundation staff was] very supportive of our efforts and helped introduce us to other funding sources.”

Active Help in Securing Funding from Other Sources (3)

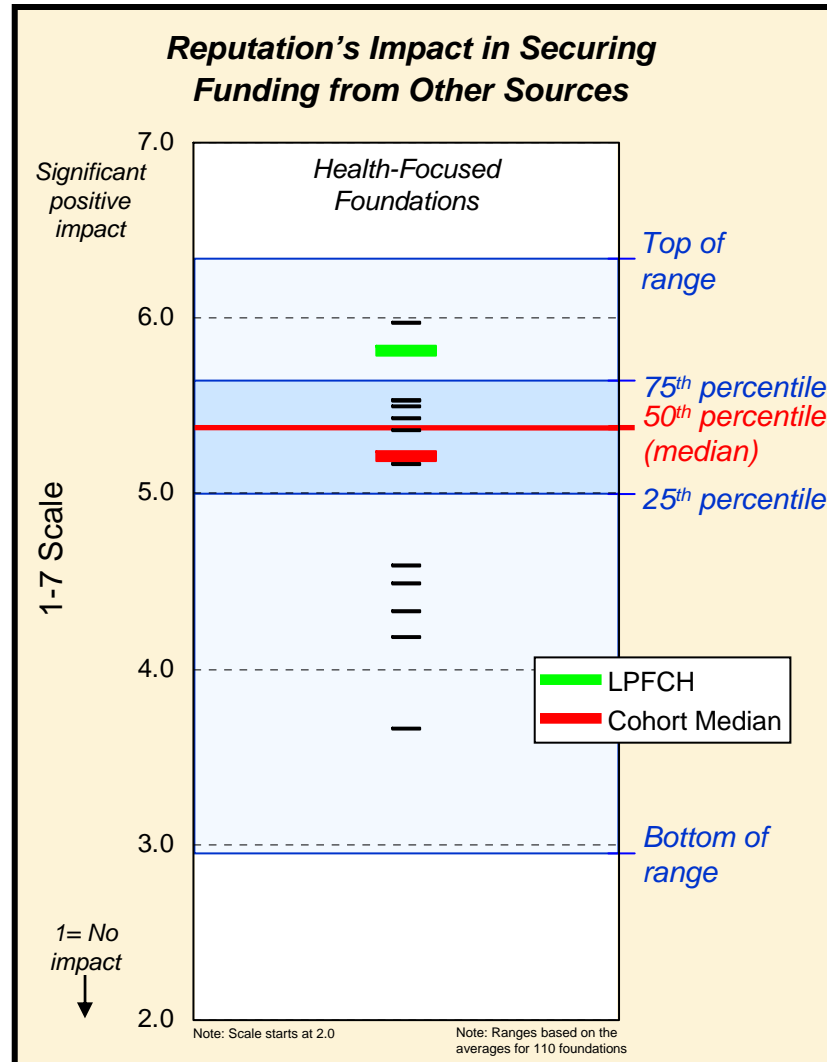
LPFCH suggests more potential funders to its grantees than typical, but is less likely to introduce funders to grantees or attend meetings on behalf of grantees.

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



Impact of Reputation in Securing Funding from Other Sources

LPFCH grantees rate the impact of the Foundation's reputation in securing funding from other sources substantially more positively than the ratings received by the median foundation.

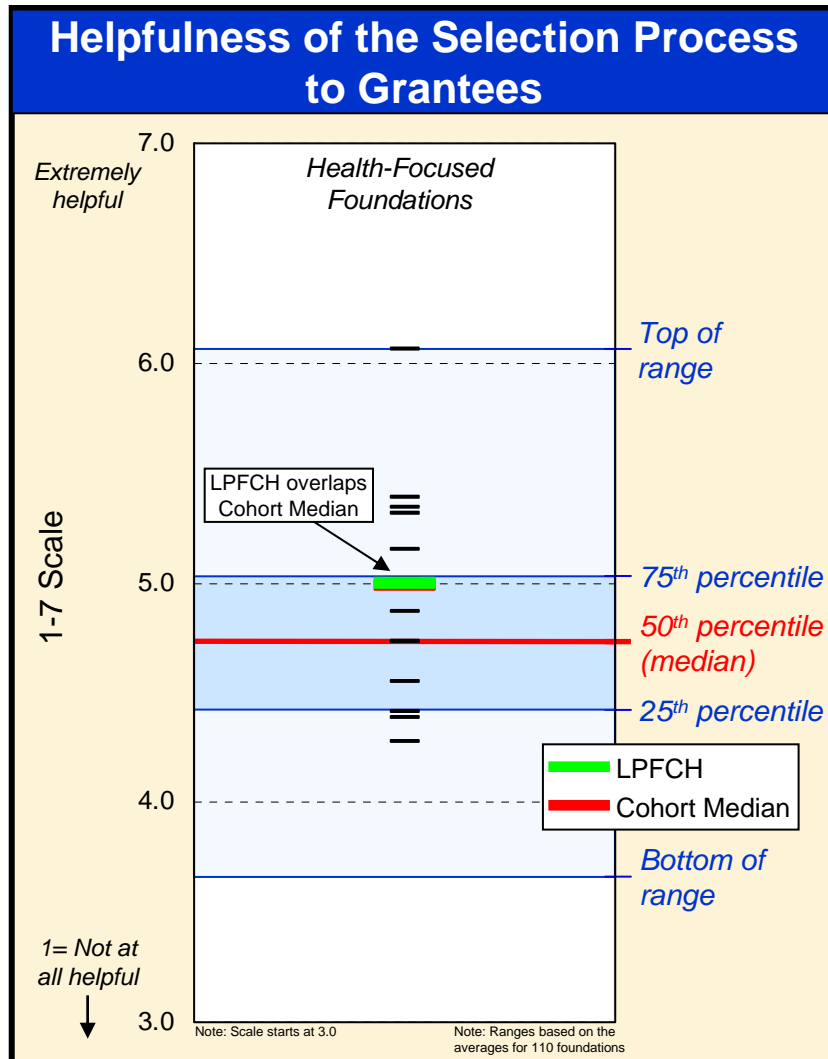


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Helpfulness of Selection Process

Participating in the selection process at LPFCH is seen to be more helpful in strengthening the grantee than the process of the median foundation is perceived to be by its grantees, and as helpful as the process of the median health-focused foundation.

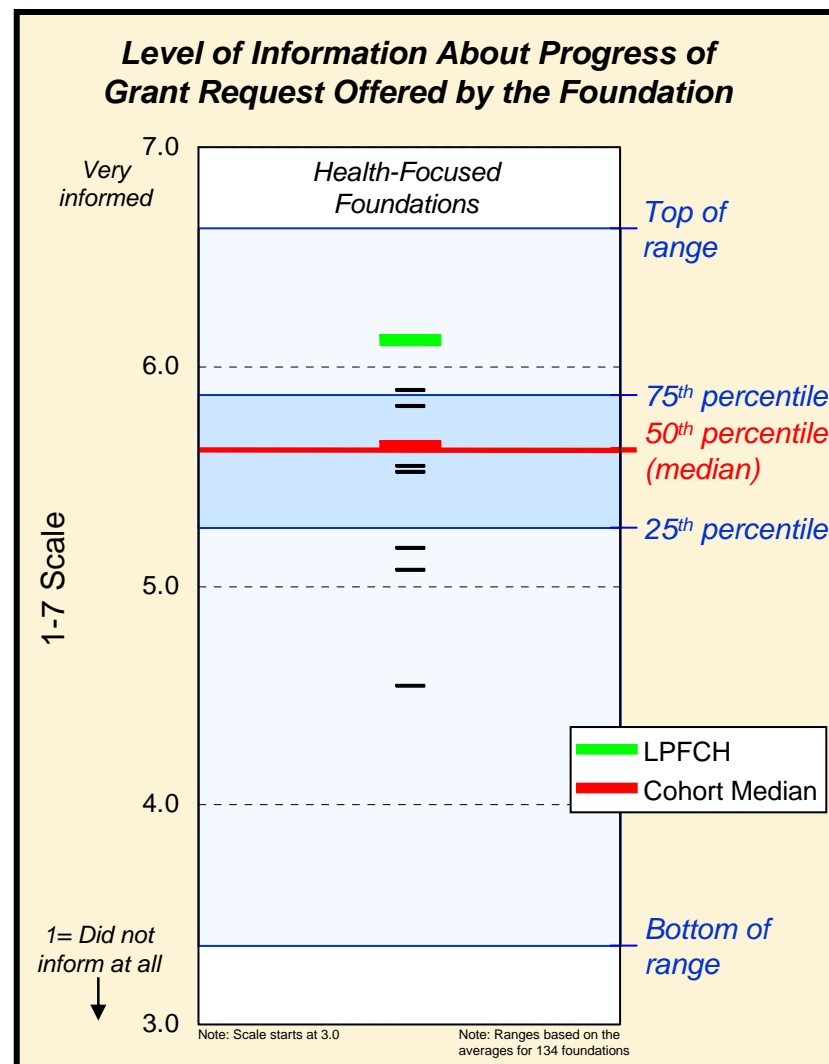


Grantee Comments on the Selection Process

- ◆ *“Foundation staff was extremely helpful in helping agency staff develop a strong proposal.”*
- ◆ *“In my interactions with Foundation staff, I found them to be very professional and straightforward. It was one of the toughest proposals we put together last year, but the staff provided the information and guidance that we needed to get the job done.”*
- ◆ *“Staff are very supportive but forms and procedures [are] the most difficult I have found short of government.”*
- ◆ *“I found [our program officer] to be at all times professional. While information during the course of the proposal process continually needed to be updated and expanded upon, [she] always set clear timelines for each of the requests. [She] always remained positive and forthright.”*
- ◆ *“The budget and financial information part of the grant application was fairly challenging to complete.”*

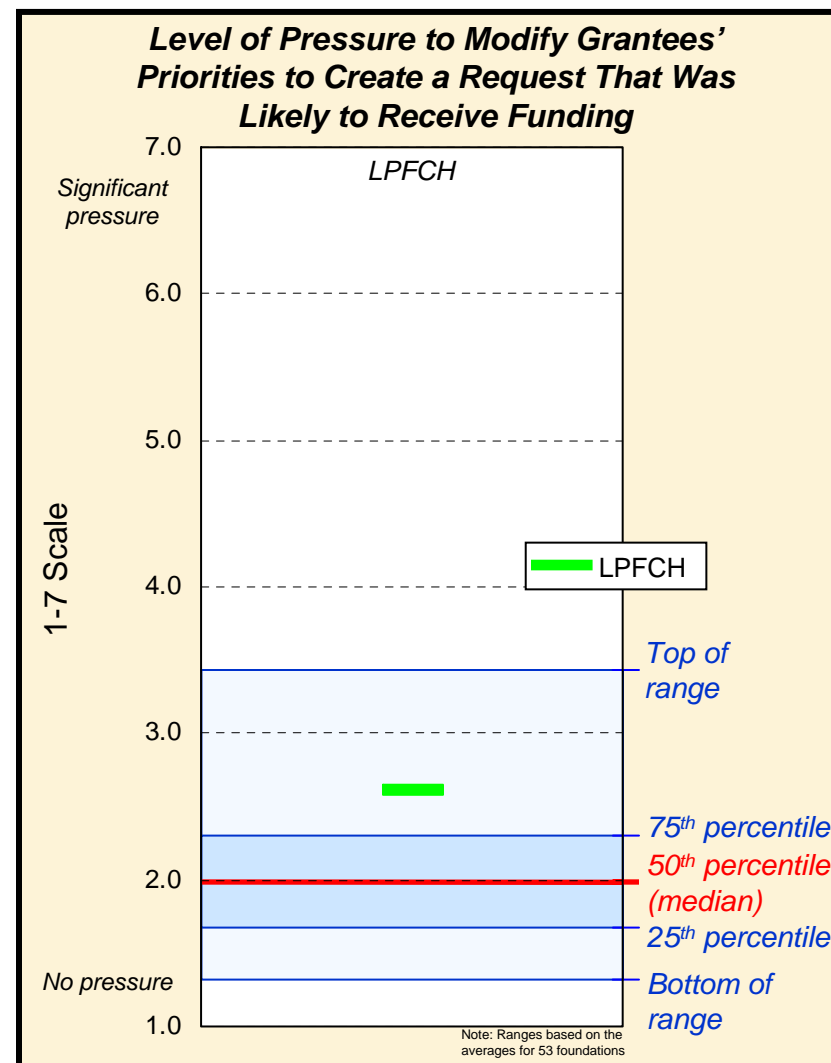
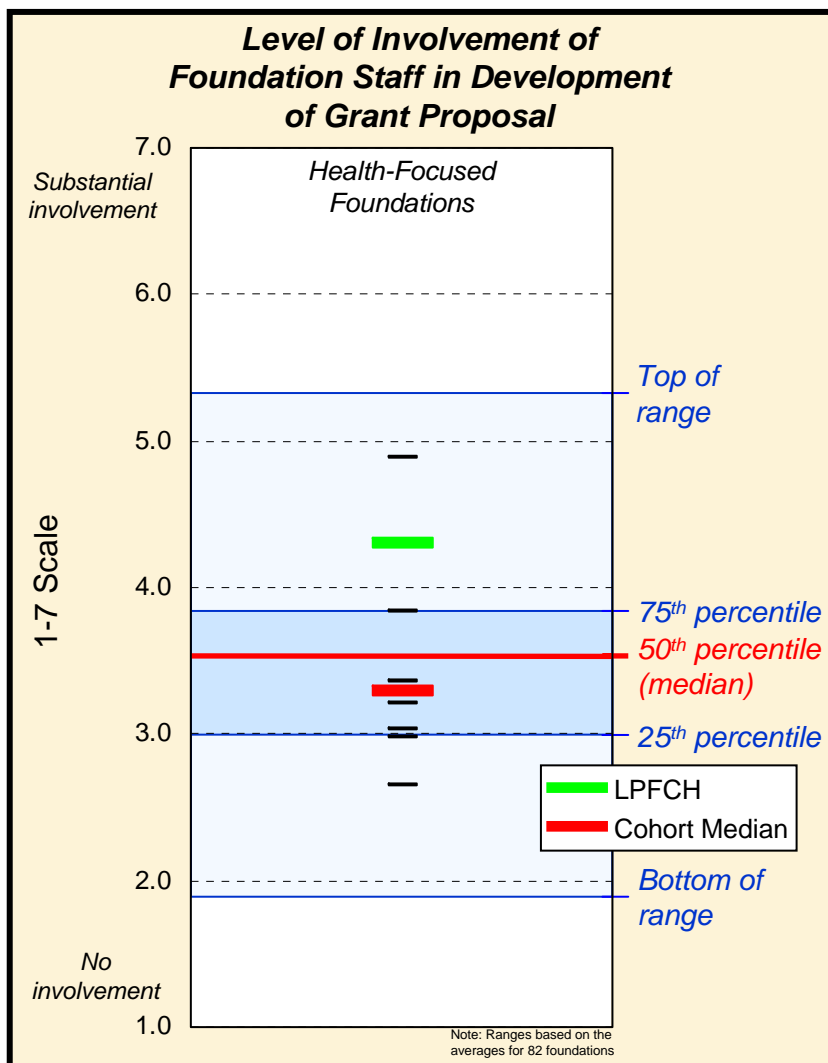
Communication During Selection Process

LPFCH keeps its grantees substantially more informed about the progress of their grant request than typical during the selection process.



Impact of Foundation on Proposal Development

Grantees rate Foundation staff as substantially more involved in proposal development than the median foundation is rated by its grantees. LPFCH grantees' ratings of the level of pressure they perceived to modify their priorities in order to receive funding is substantially above the ratings of the median foundation.

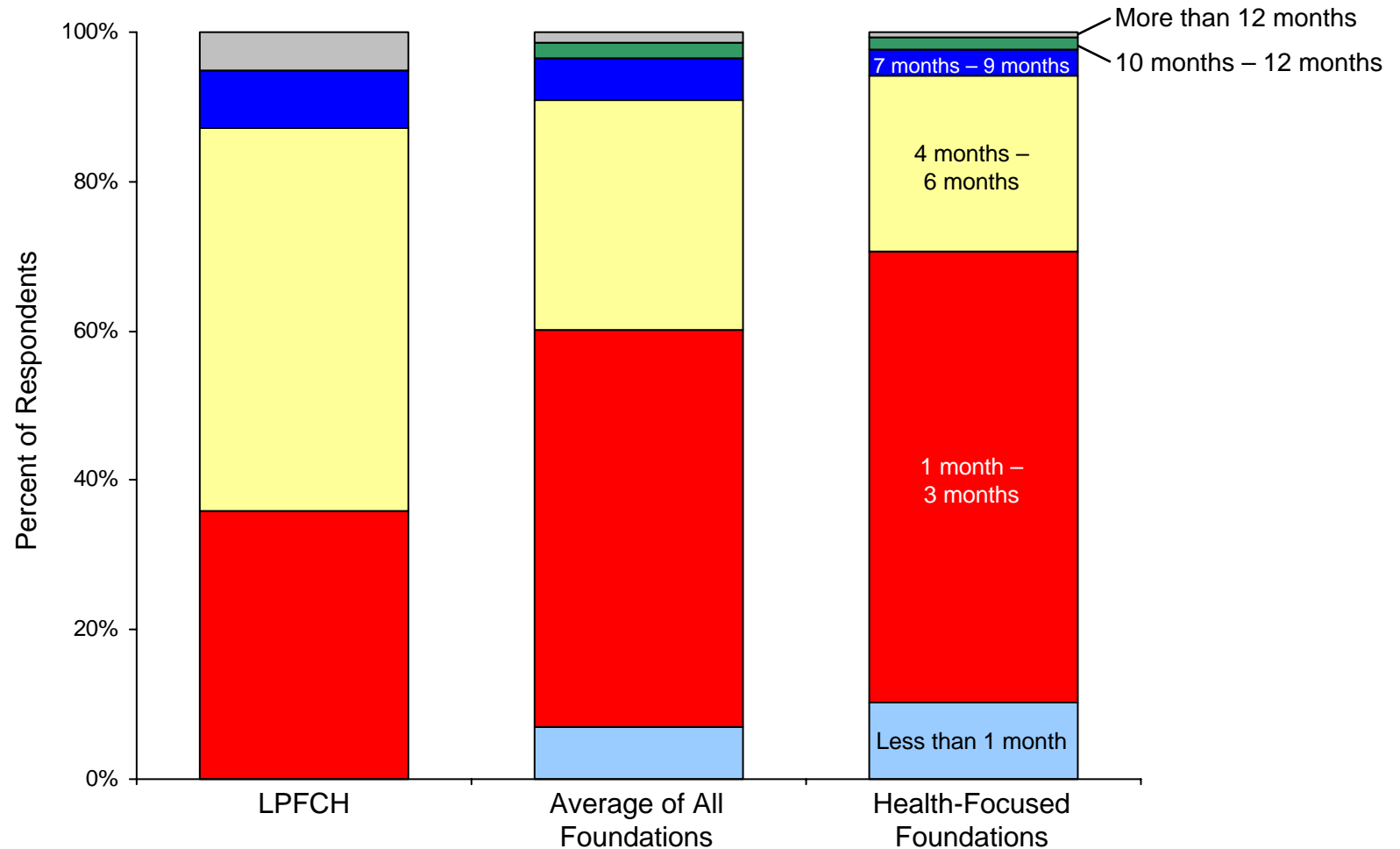


51 Note: Cohort not shown in right-hand chart because of changes to the survey instrument.

Time Between Submission and Clear Commitment

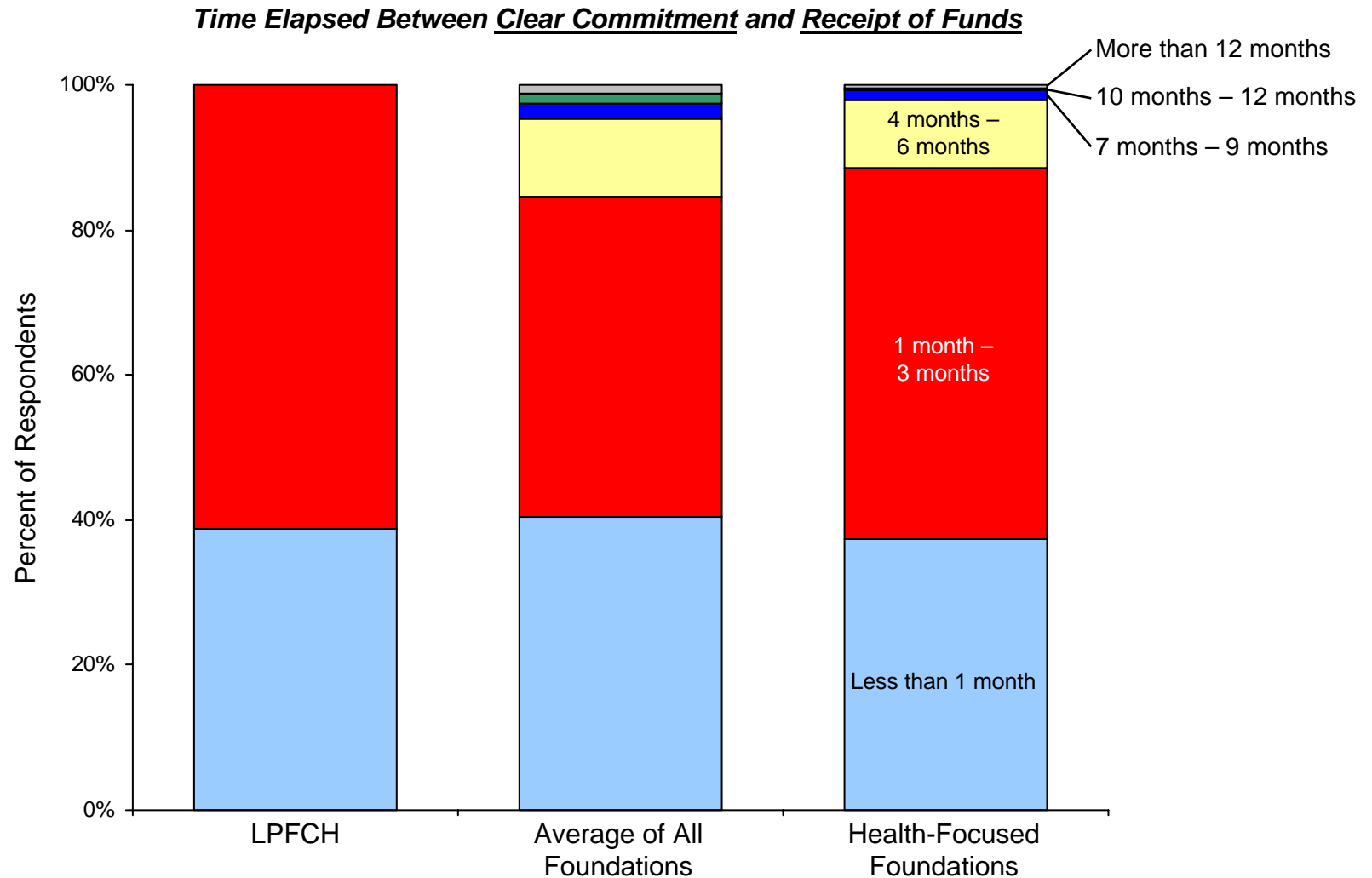
The majority of LPFCH grantees report receiving a clear commitment of funding 4-6 months after submitting a proposal.

Time Elapsed Between Proposal Submission and Clear Commitment



Time Between Clear Commitment and Receipt of Funds

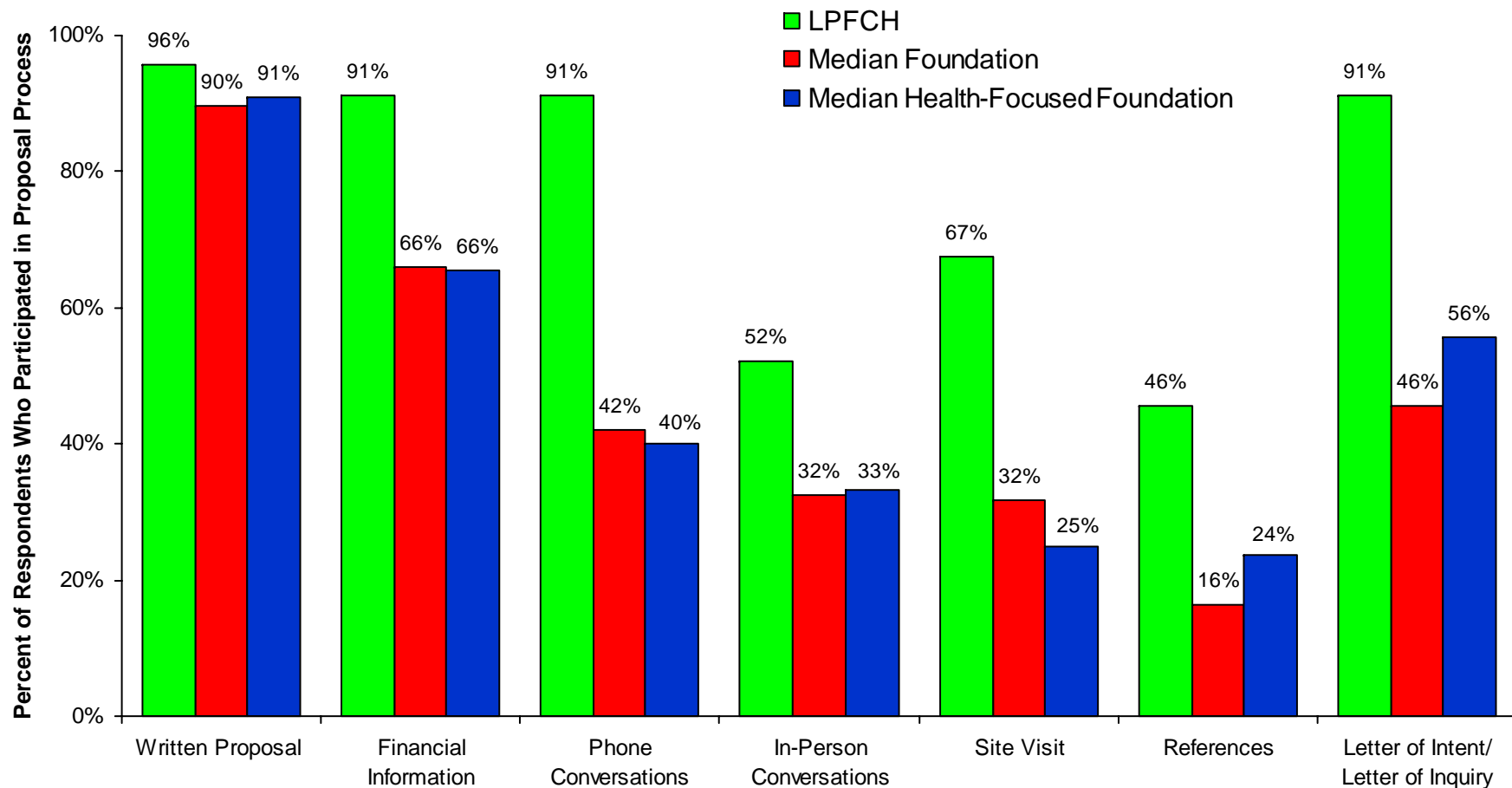
All LPFCH grantees report three months or less elapsing between clear commitment of funding and receipt of funds from the Foundation.



Data Requested During Selection Process

LPFCH grantees more frequently report submitting written documents and interacting with Foundation staff during the selection process than is typical.

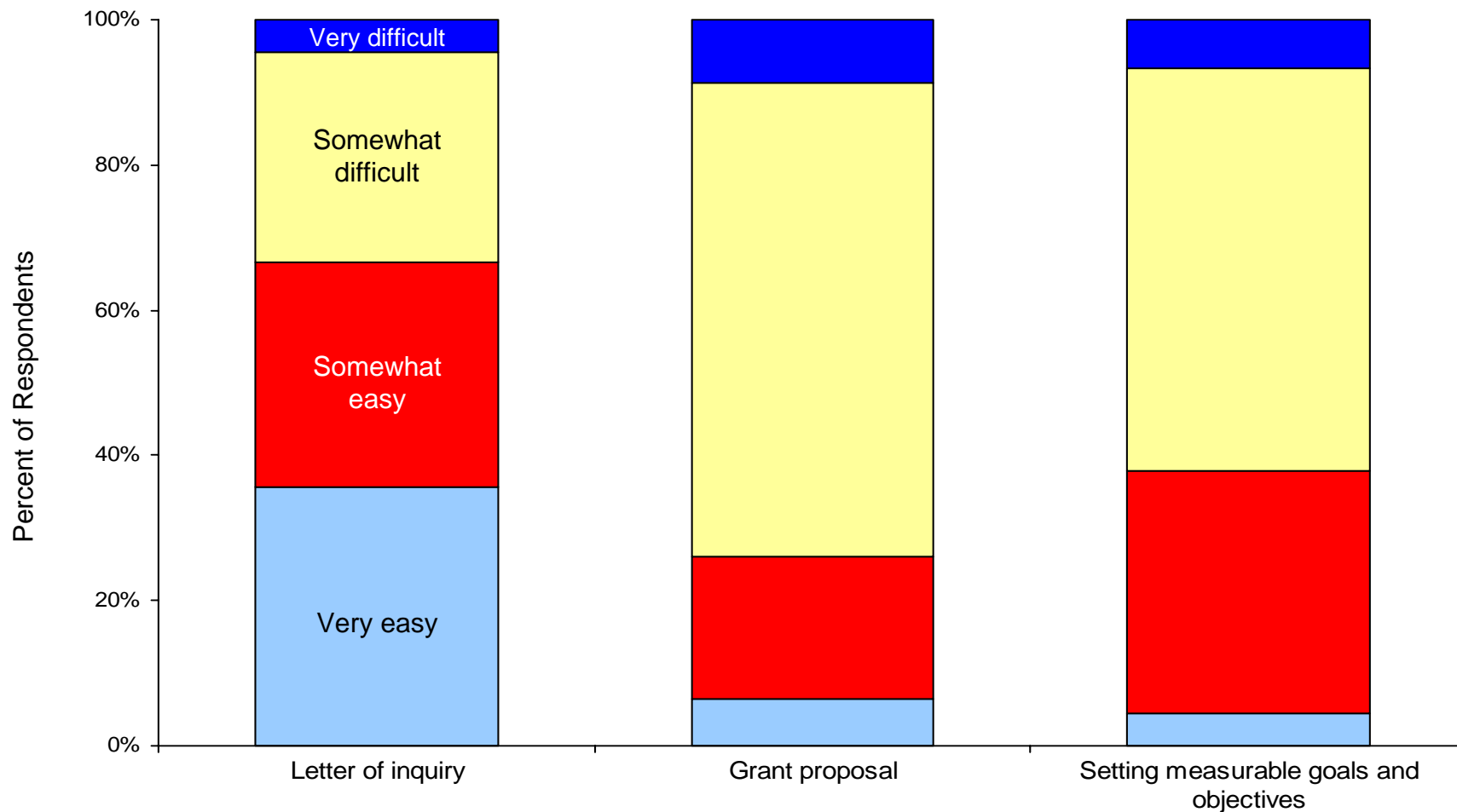
Data Requested by the Foundation During the Selection Process



Grant Application

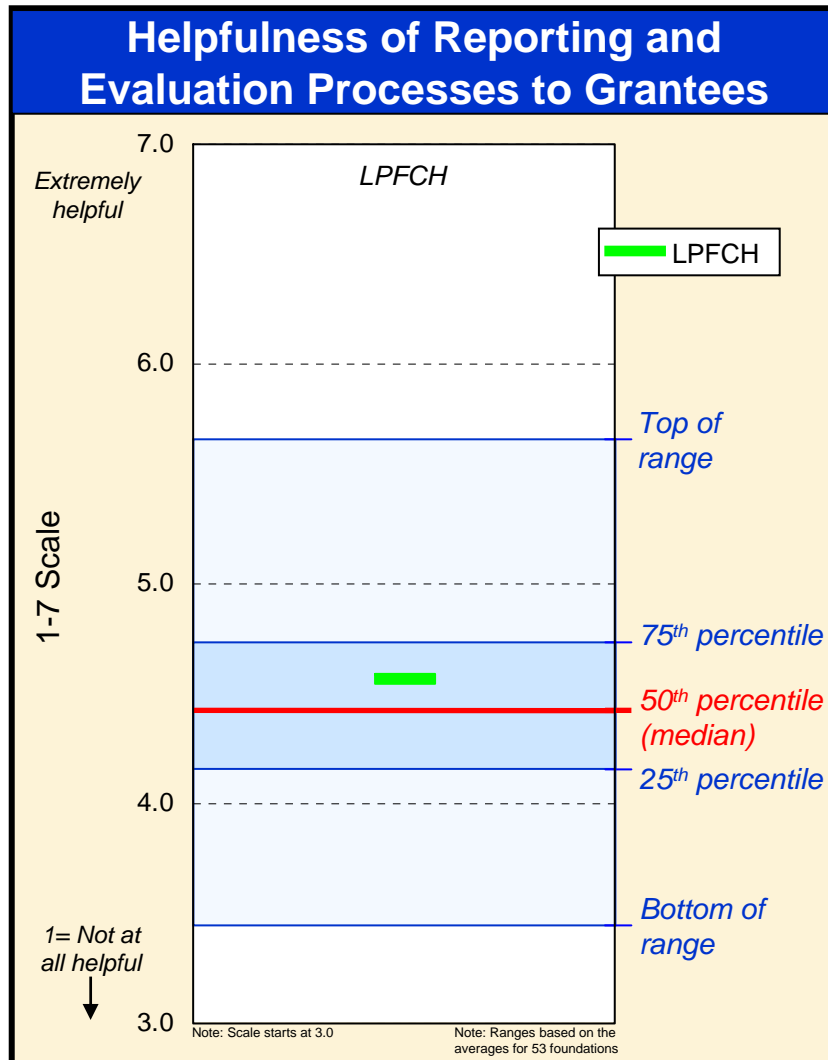
The majority of LPFCH grantees rate the Foundation’s grant proposal and the setting of measurable goals and objectives as “somewhat difficult” or “very difficult.”

“Please rate the difficulty of each part of the grant application.”



Helpfulness of Reporting and Evaluation Processes

LPFCH's reporting and evaluation¹ processes are seen to be more helpful in strengthening grantees than the processes of the median foundation, and as helpful as the processes of the median health-focused foundation.



Grantee Comments on Reporting and Evaluation Processes

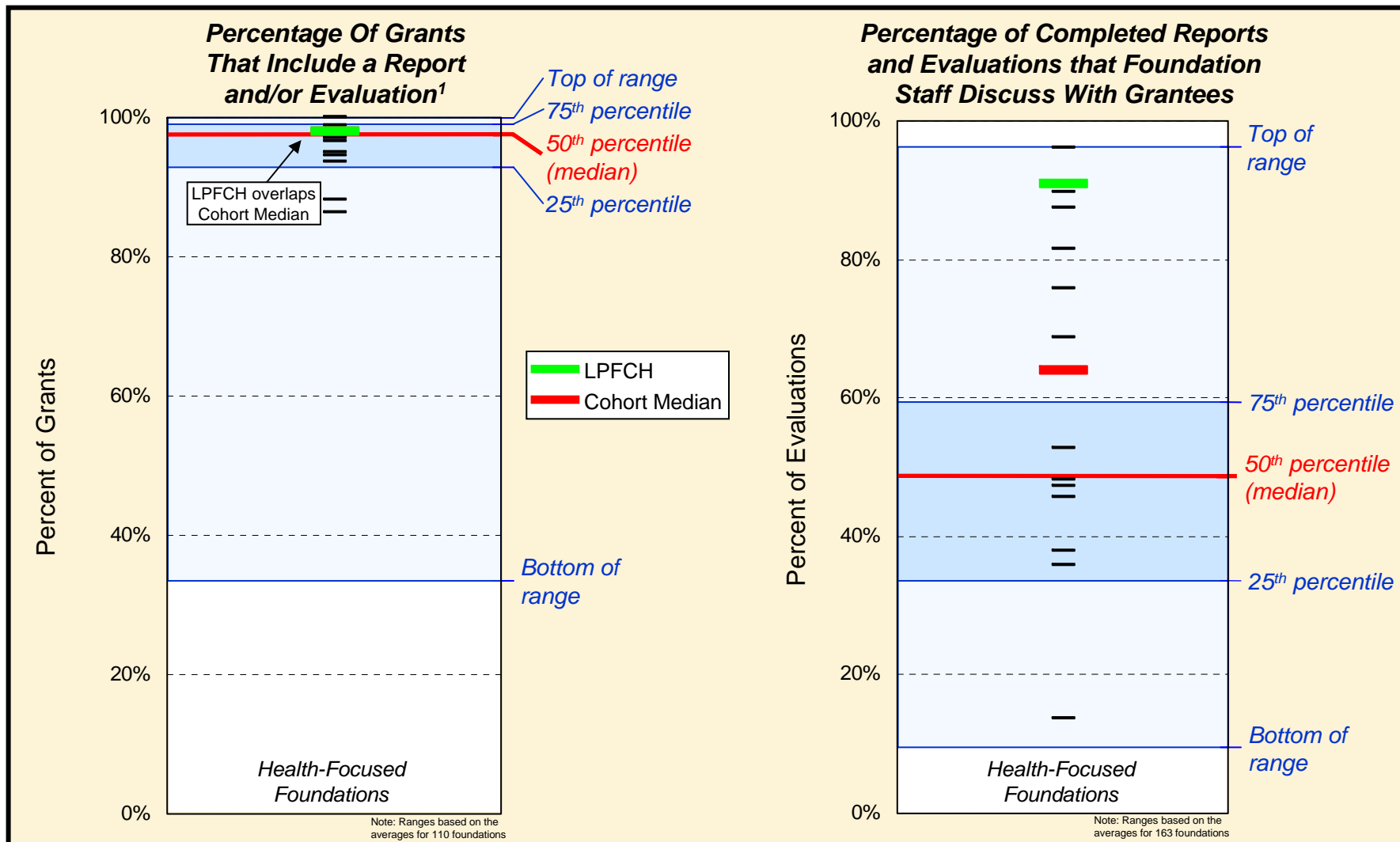
- ◆ *“Program staff was very thorough and challenging in an effort to fine-tune numbers served, specific objectives, and organizational goals.”*
- ◆ *“[We’d prefer] less complicated [forms] – LPFCH forms have a reputation as being the worst!”*
- ◆ *“We have just begun a ... partnership with a Foundation grantee that will be helping us improve our measurement tools and evaluation methods. We believe this will ultimately have a very significant impact on the overall quality of our program.”*

1: “Evaluation” in the survey includes any activity considered by grantees to be part of an evaluation, and does not necessarily correspond to foundation definition.

Note: Cohort not shown because of changes to the survey instrument.

Reporting and Evaluation Processes

Ninety-eight percent of LPFCH grantees report that their grant includes a report/evaluation. Ninety-one percent of those grantees report discussing completed reports/evaluations with Foundation staff, a substantially larger proportion than is typical.

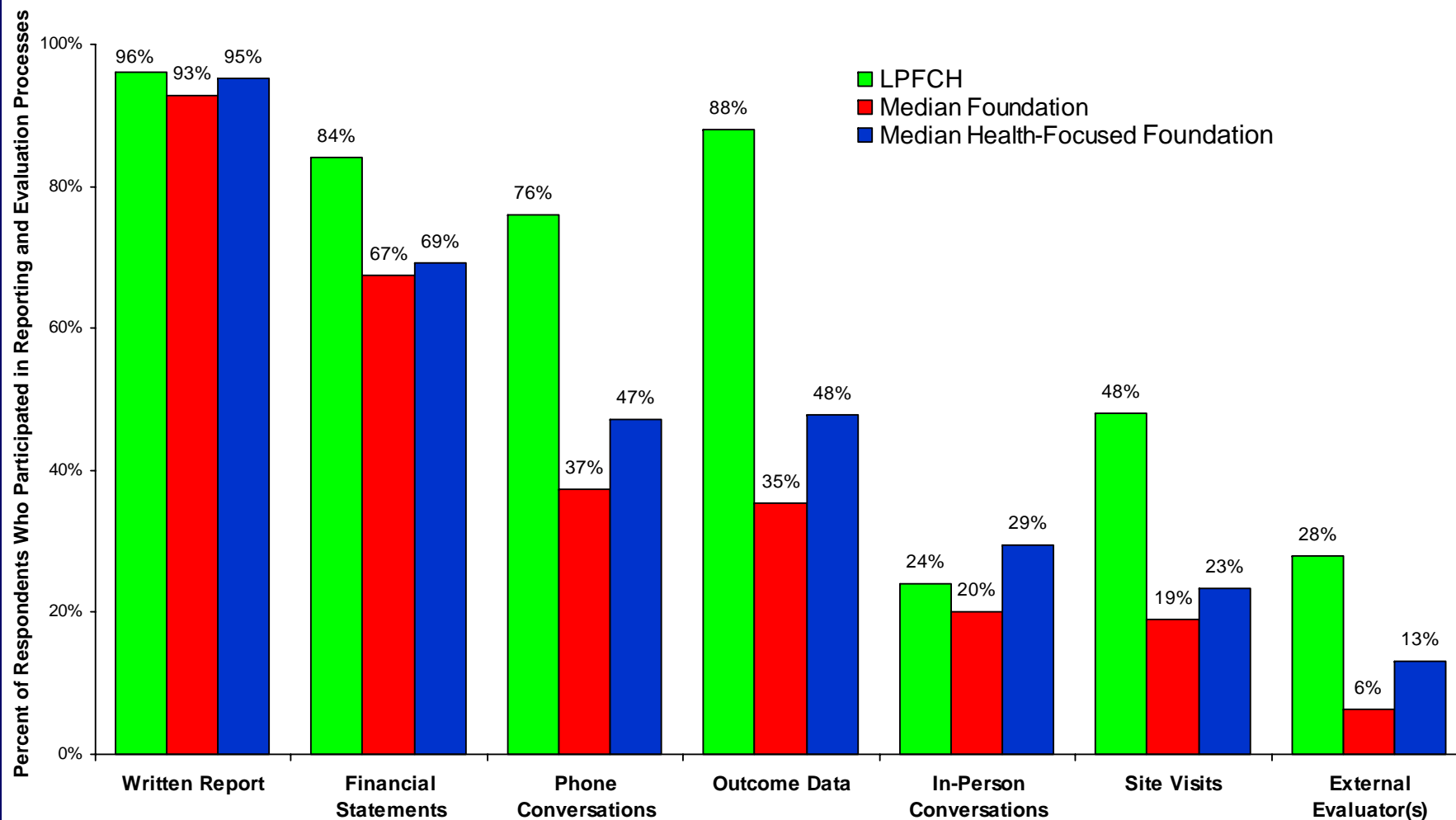


1: "Evaluation" in the survey includes any activity considered by grantees to be part of an evaluation, and does not necessarily correspond to foundation definition.

Data Requested During the Reporting and Evaluation Processes

LPFCH grantees more frequently report submitting outcome data and having phone conversations and site visits during the evaluation process than is typical.

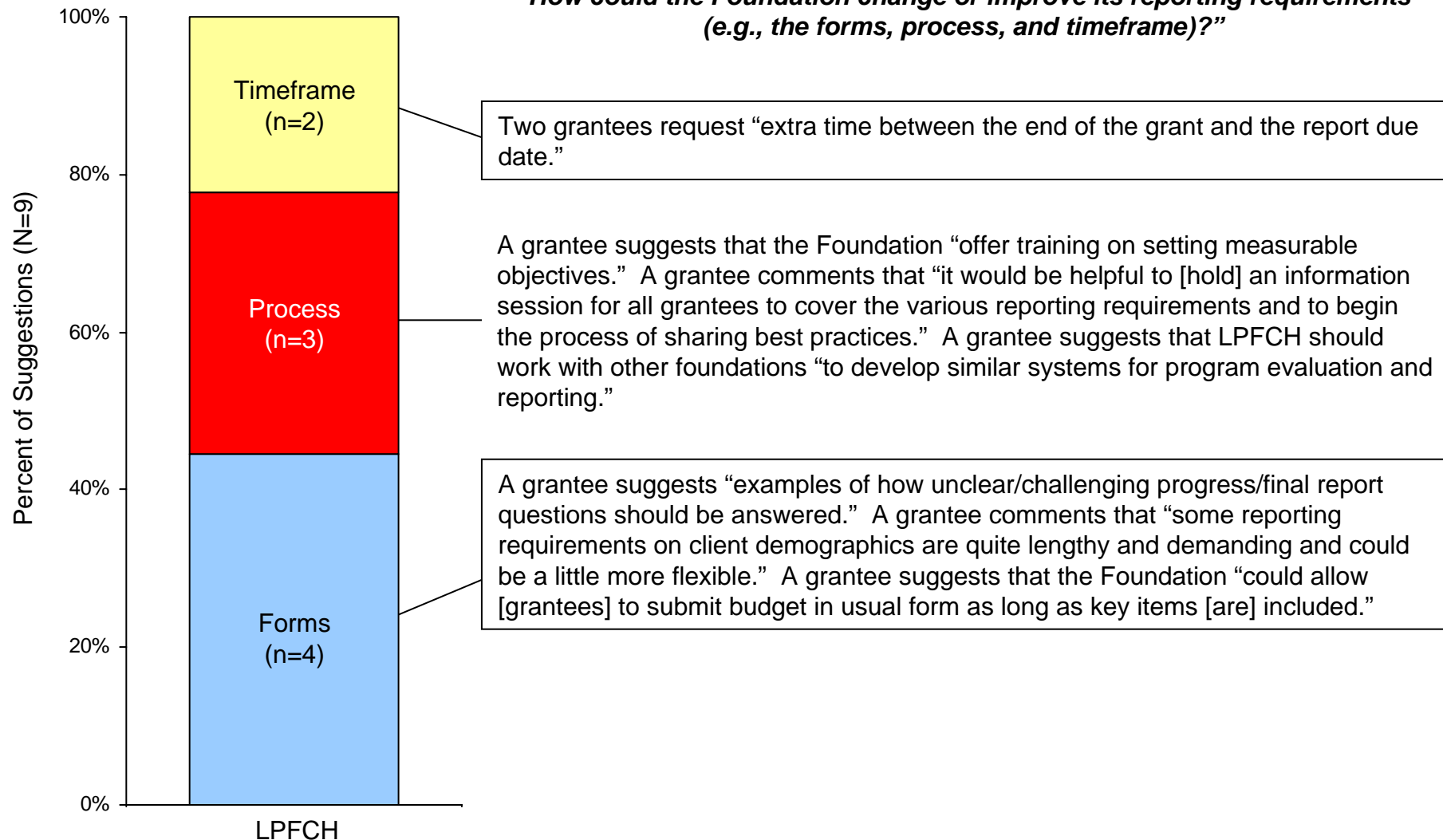
Data Requested by the Foundation During the Reporting and Evaluation Processes



Grantee Suggestions about the Evaluation Process

LPFCH grantees were asked to suggest how the Foundation could change or improve its reporting requirements. Nine grantees provided suggestions, which are summarized below.

“How could the Foundation change or improve its reporting requirements (e.g., the forms, process, and timeframe)?”



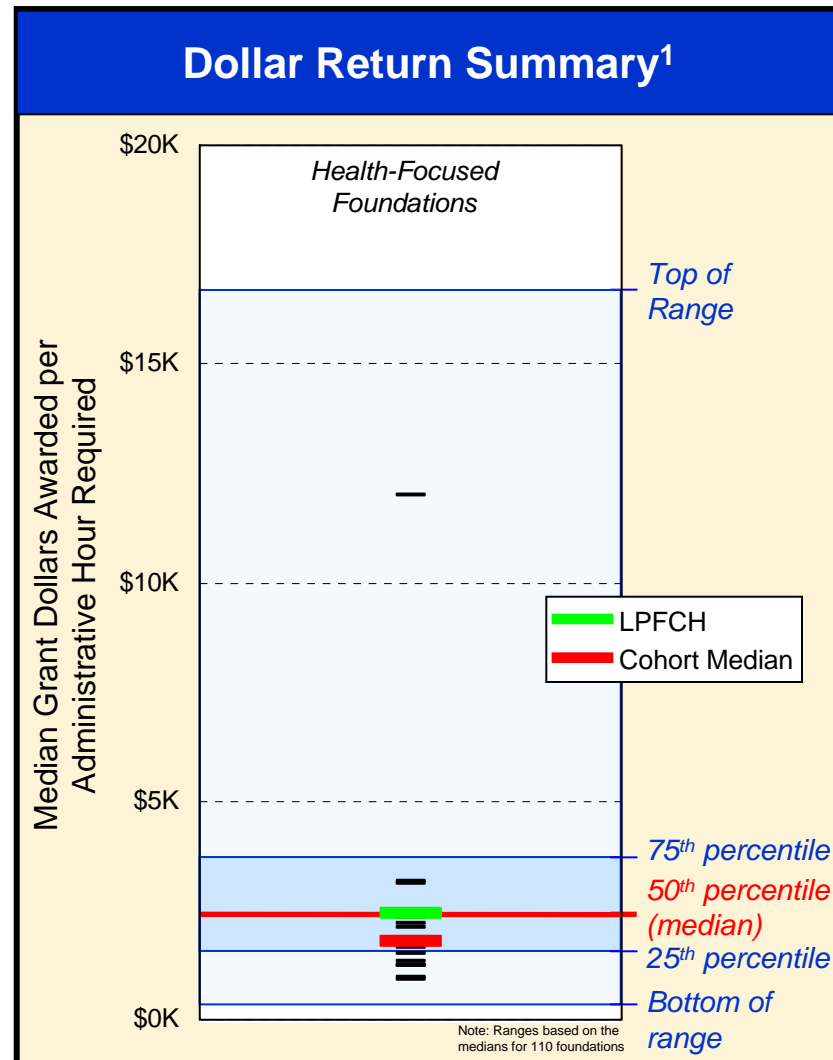
Dollar Return on Grantee Administrative Hours

The Dollar Return Summary describes grant dollars awarded to grantees in comparison to administrative requirements on grantee.

- ◆ *LPFCH awards a typical number of dollars per administrative hour required of grantees relative to all foundations, and a greater number than most health-focused foundations.*

This composite measure includes:

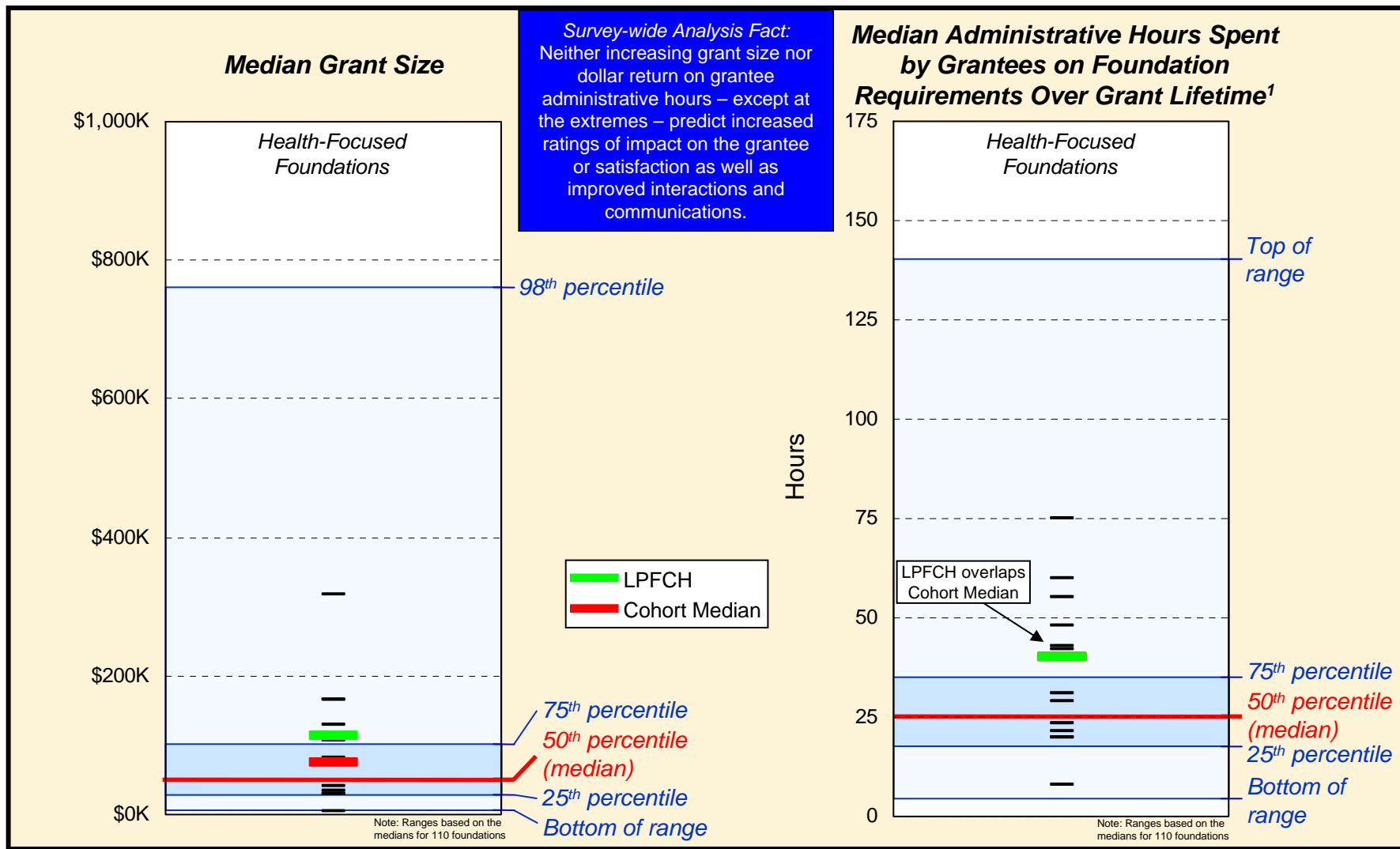
- *The total grant dollars awarded*
- *The total time necessary to fulfill the administrative requirements over the lifetime of the grant.*



¹: Dollar Return on Grantee Administrative Hours is calculated for each grantee and aggregated by foundation for the Dollar Return Summary.

Grant Size and Administrative Time Required

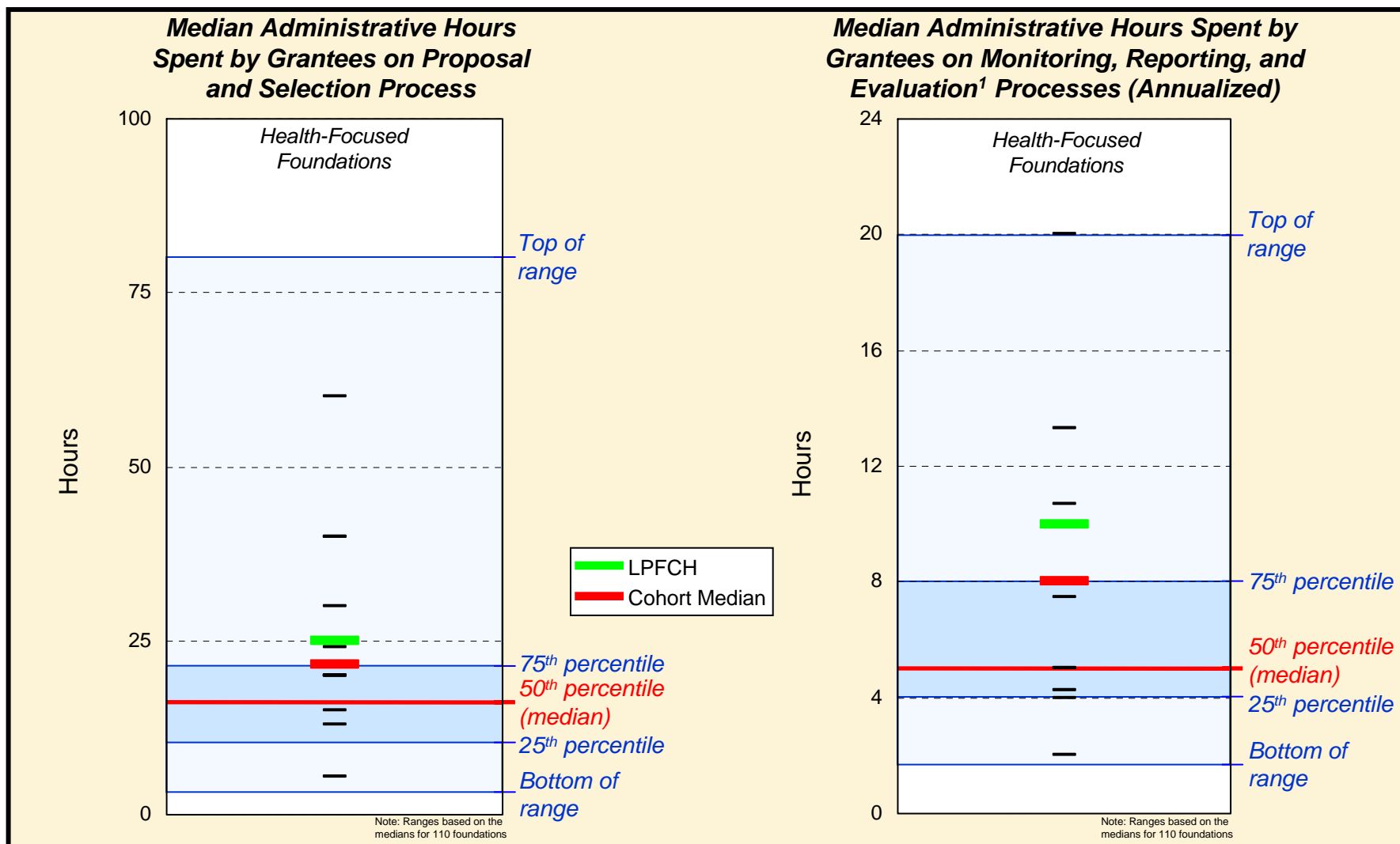
LPFCH awards substantially larger grants (at the median) than the median foundation. The Foundation's grants require substantially more administrative time than the typical grant awarded by other foundations, and a similar amount compared to other health-focused foundations.



1: 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.

Administrative Time

The application process requires substantially more time from LPFCH grantees relative to what is required of grantees of the median foundation. Annual foundation-related monitoring, reporting, and evaluation of grants also are substantially more time-intensive.



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

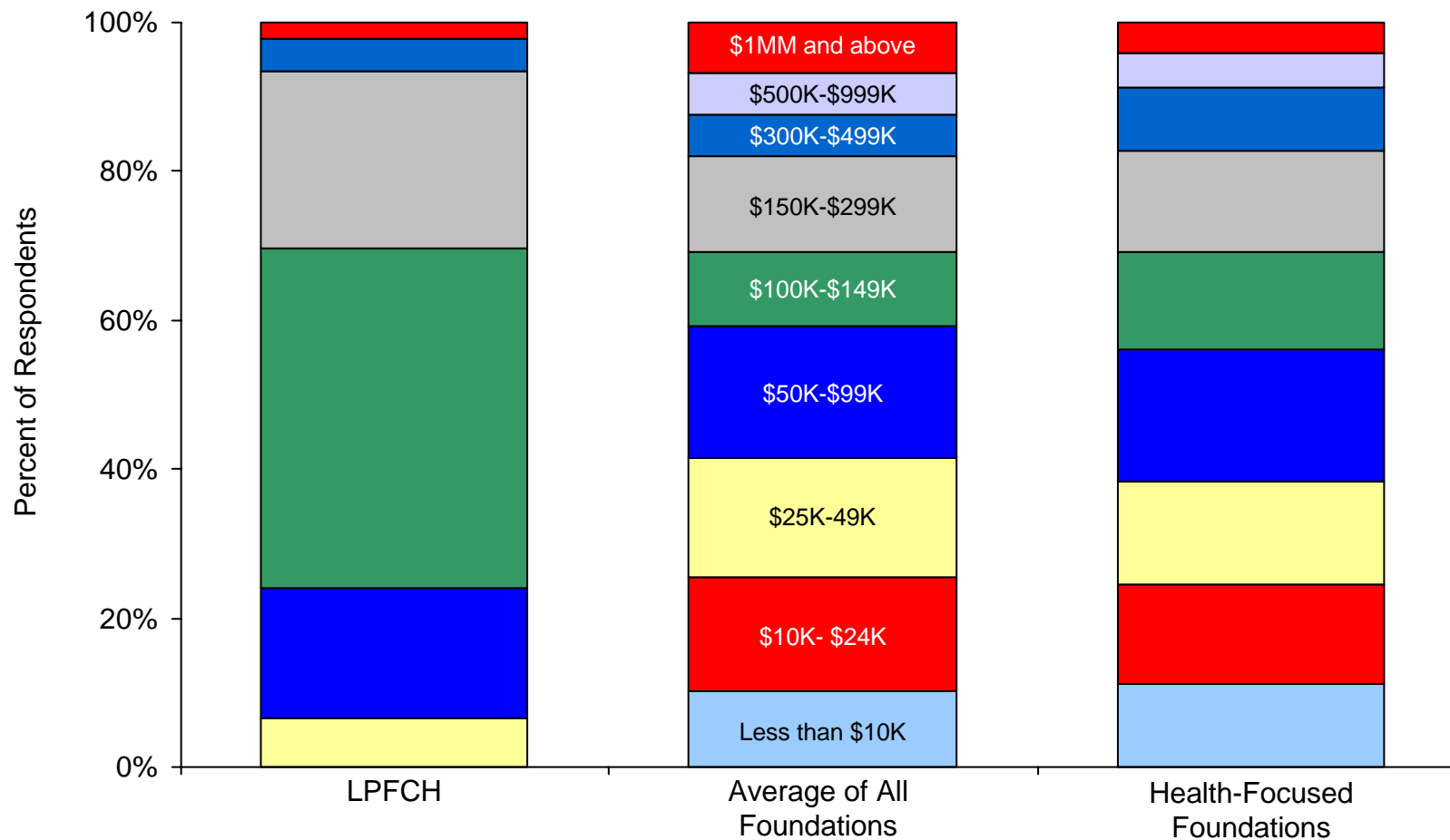
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Size of Foundation Grants

LPFCH grantees receive grants that are larger on average and at the median compared to other grantees in the sample.

Size of Foundation Grants



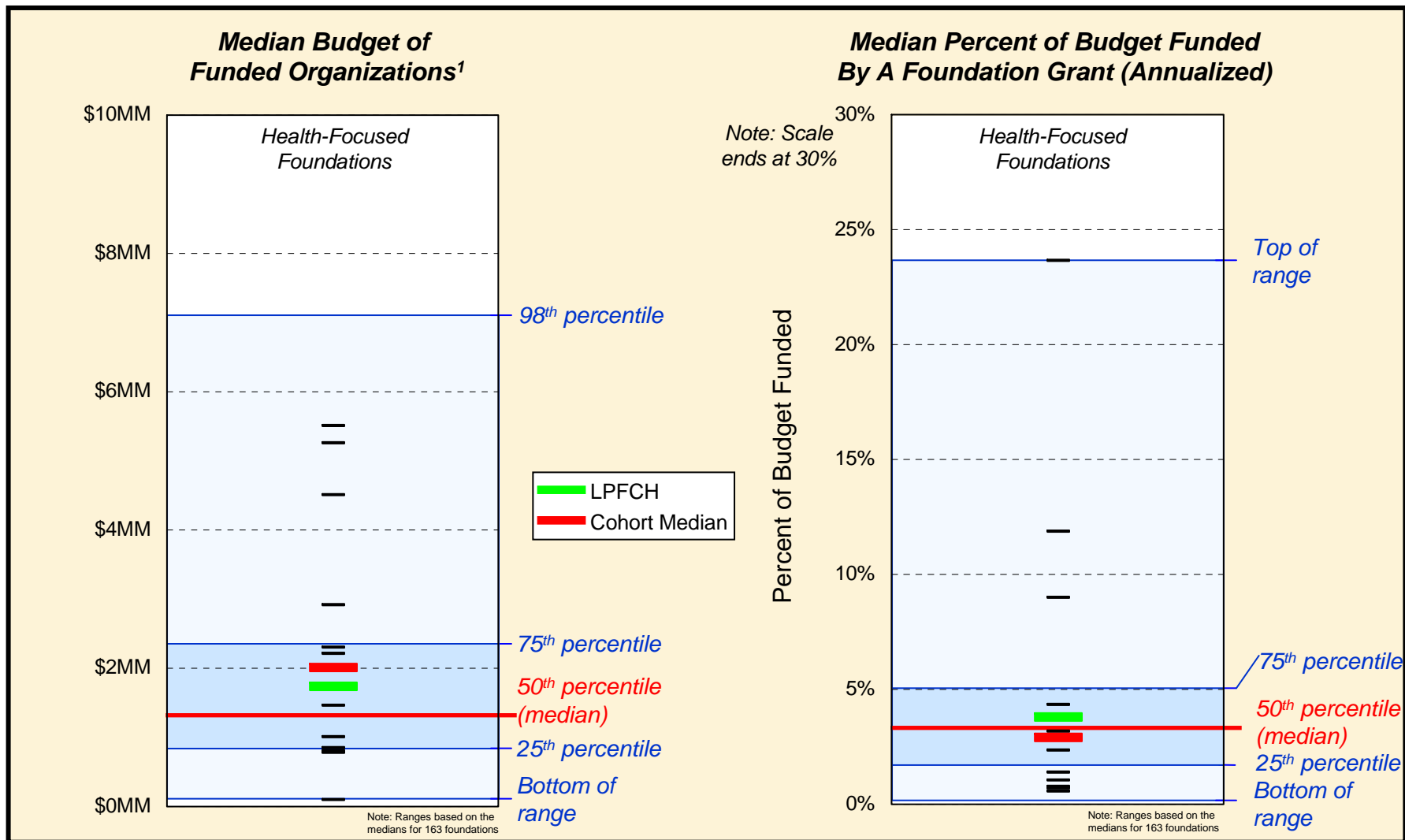
Population Average \$2.5MM
Population Median \$113K

\$420K
 \$60K

\$529K
 \$50K

Size of Organizations Funded Relative to Grant

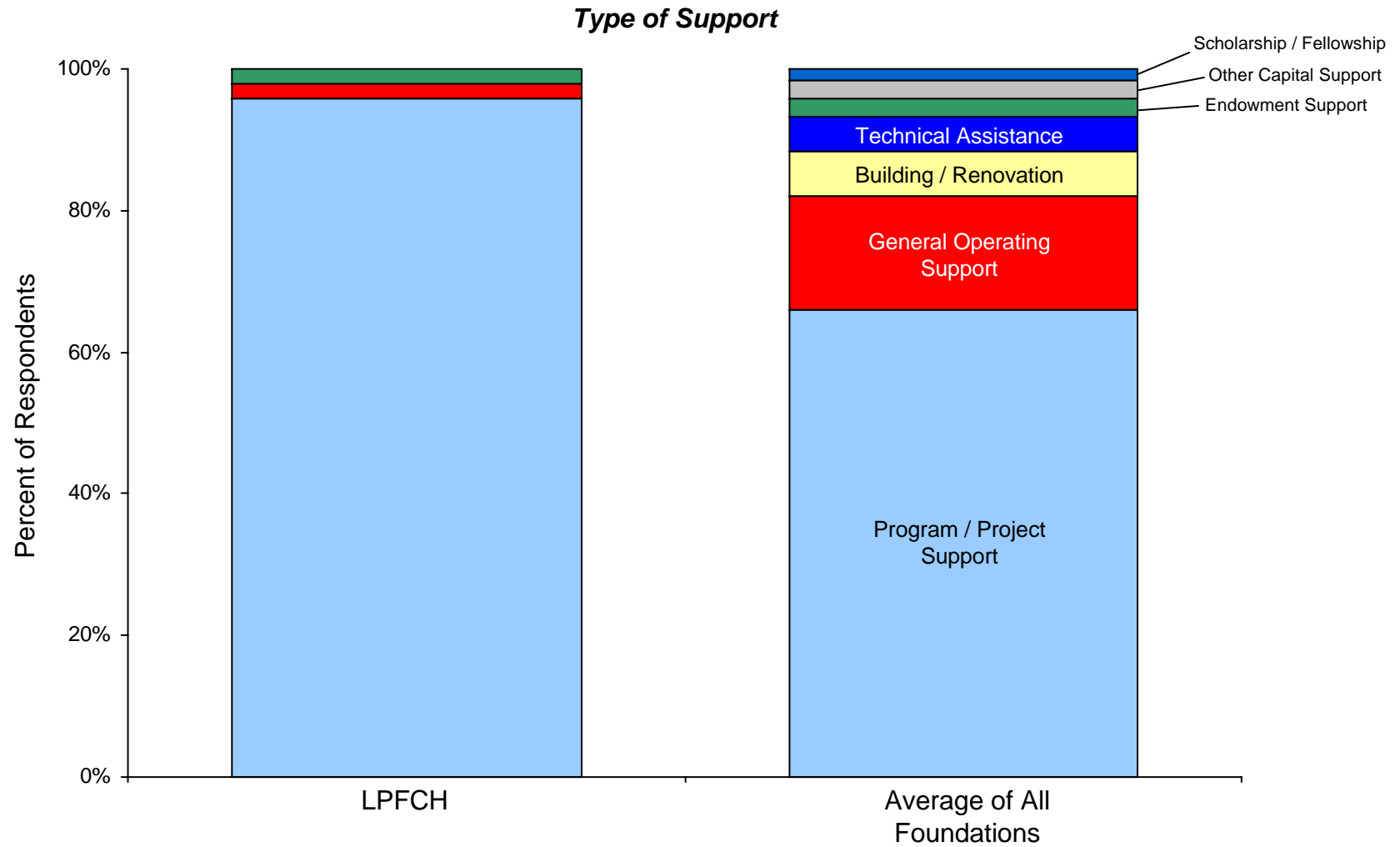
LPFCH funds larger organizations than other foundations in the comparative set, and similar sized organizations as the median health-focused foundation. LPFCH funding represents a typical percentage of grantees' budgets.



1: Chart range does not include four individual foundation medians of more than \$10MM.

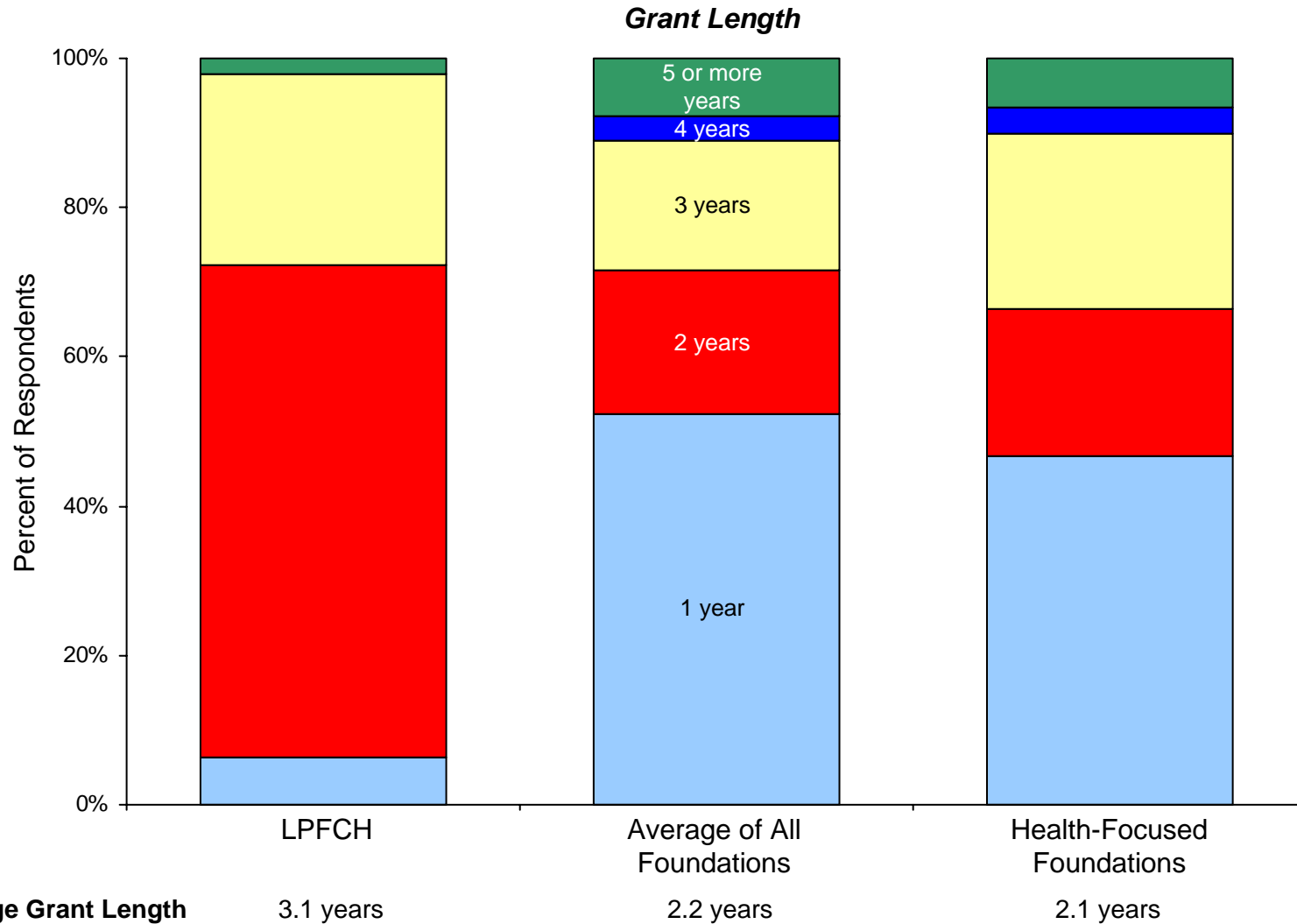
Type of Support

The majority of LPFCH grants are program support grants.



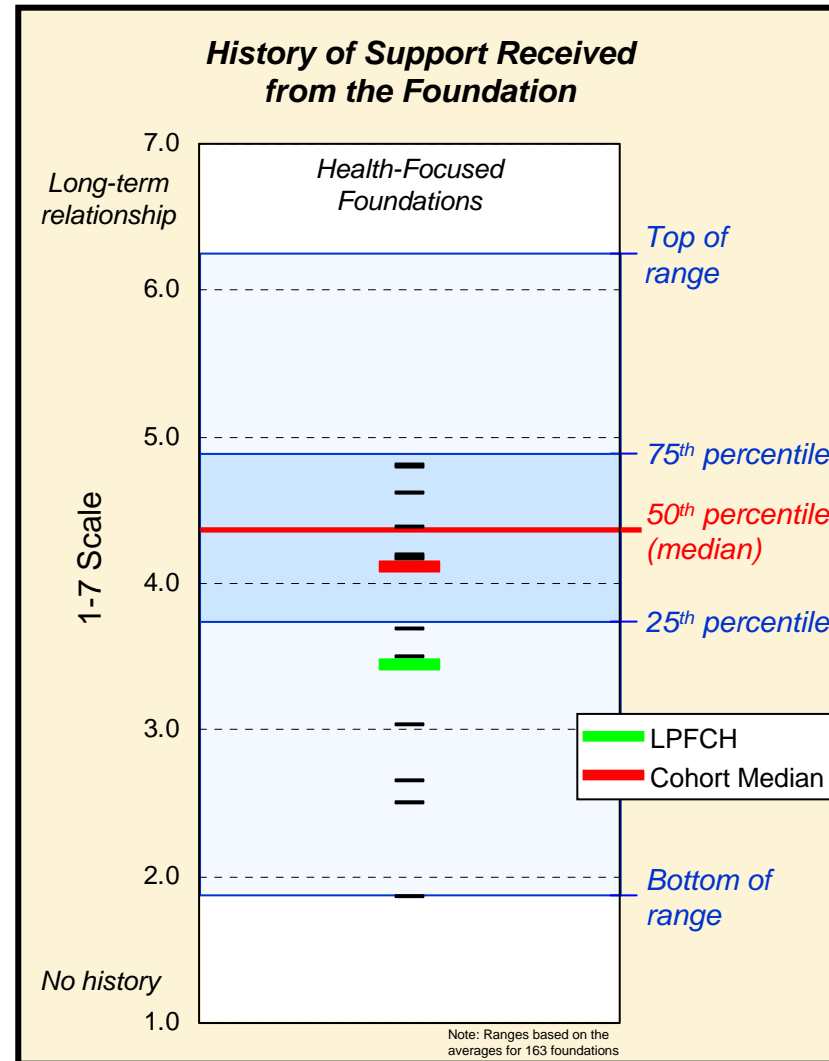
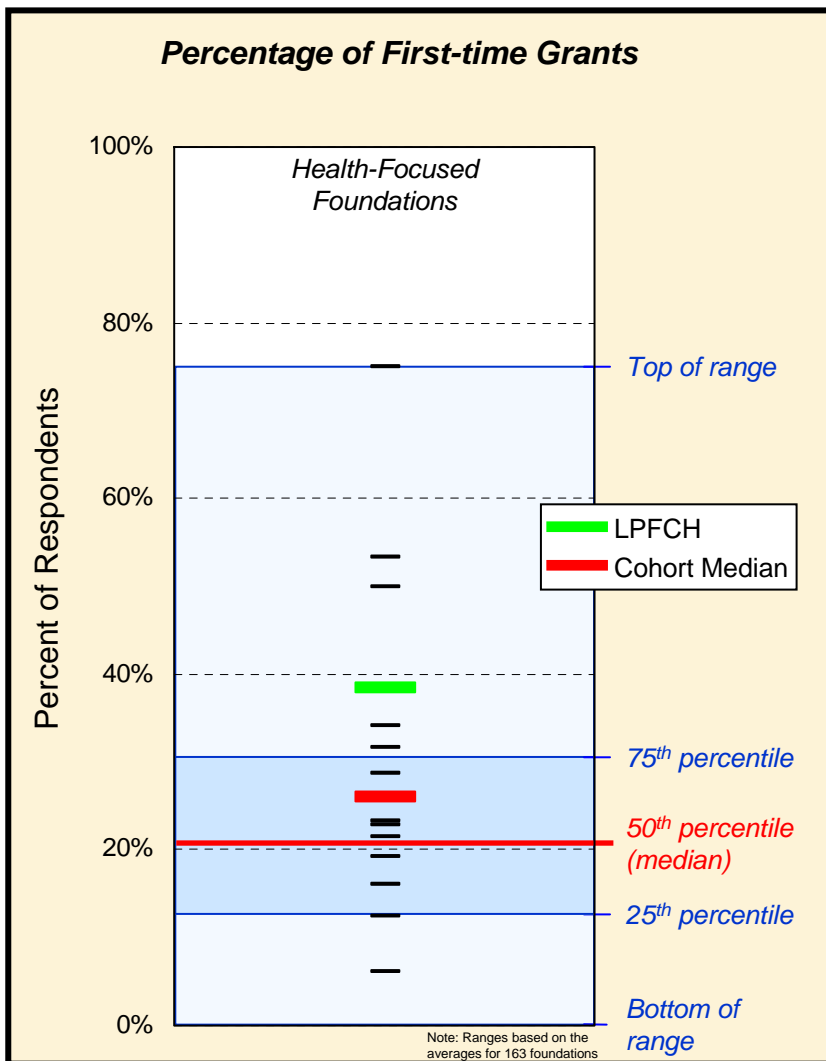
Grant Length

LPFCH awards a larger proportion of multi-year grants than typical.



History of Foundation Support

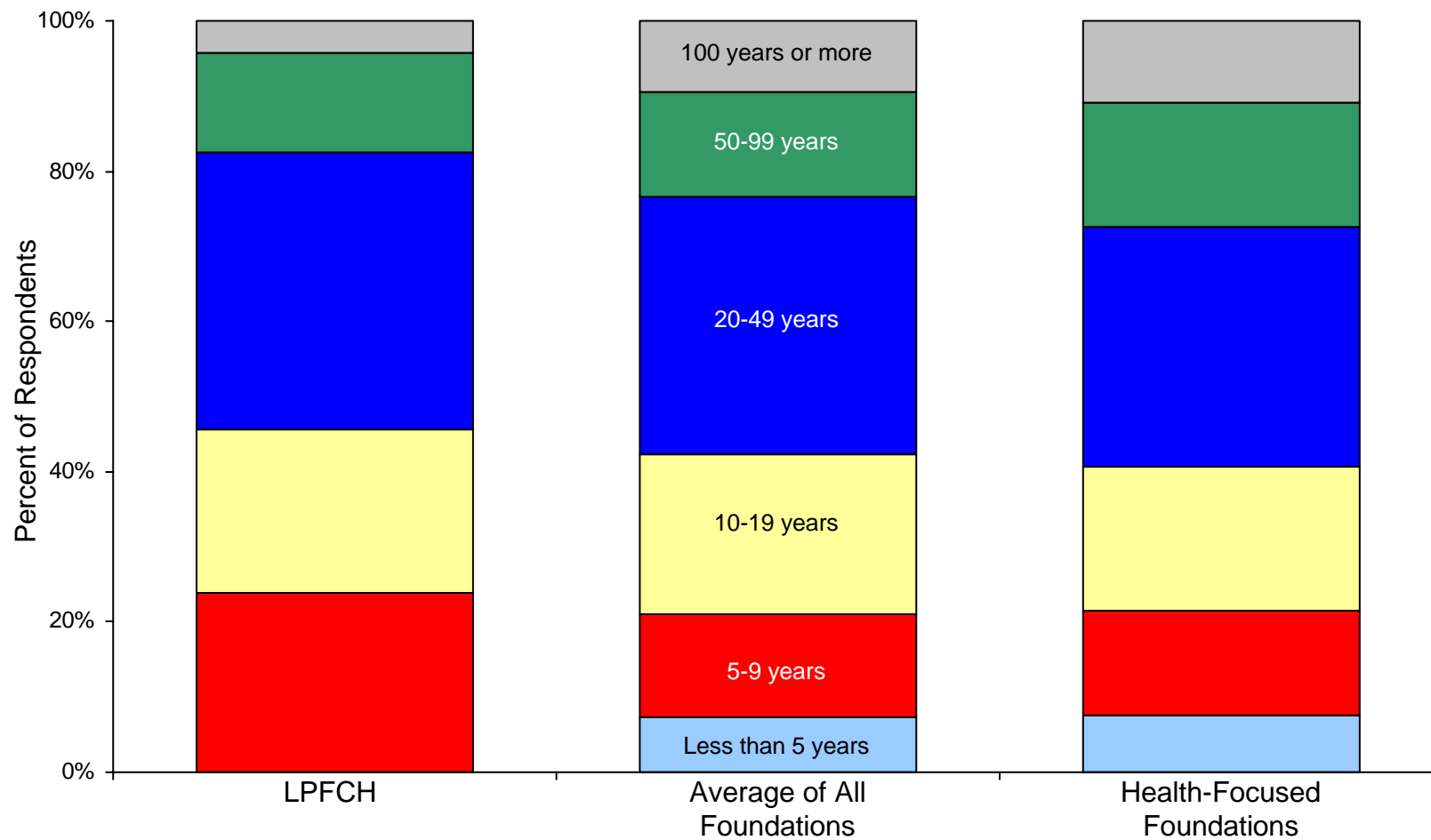
A substantially larger proportion of LPFCH grants are first-time grants than at the median foundation, and the Foundation's history of support is substantially shorter than typical.



Length of Establishment of Grantee Organizations

LPFCH grantees have been established as long as grantees of the median foundation.

Length of Establishment of Grantee Organizations



Average Length of Establishment
Median Length of Establishment

30 years

23 years

37 years

23 years

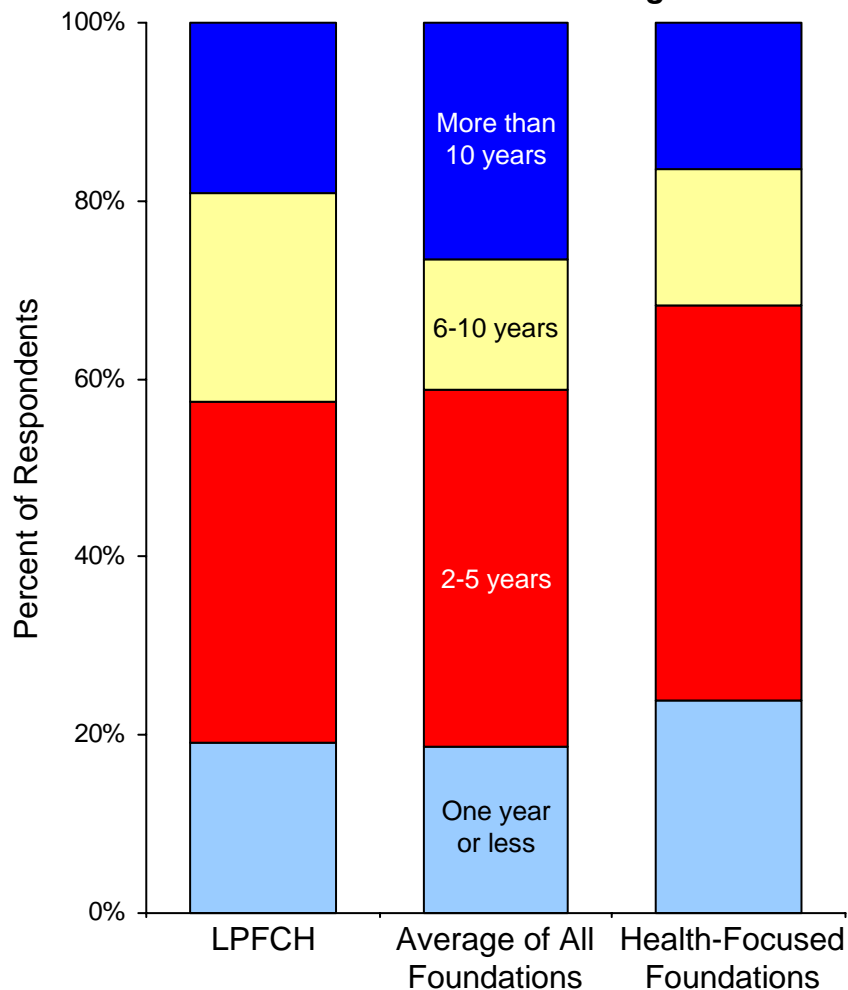
39 years

26 years

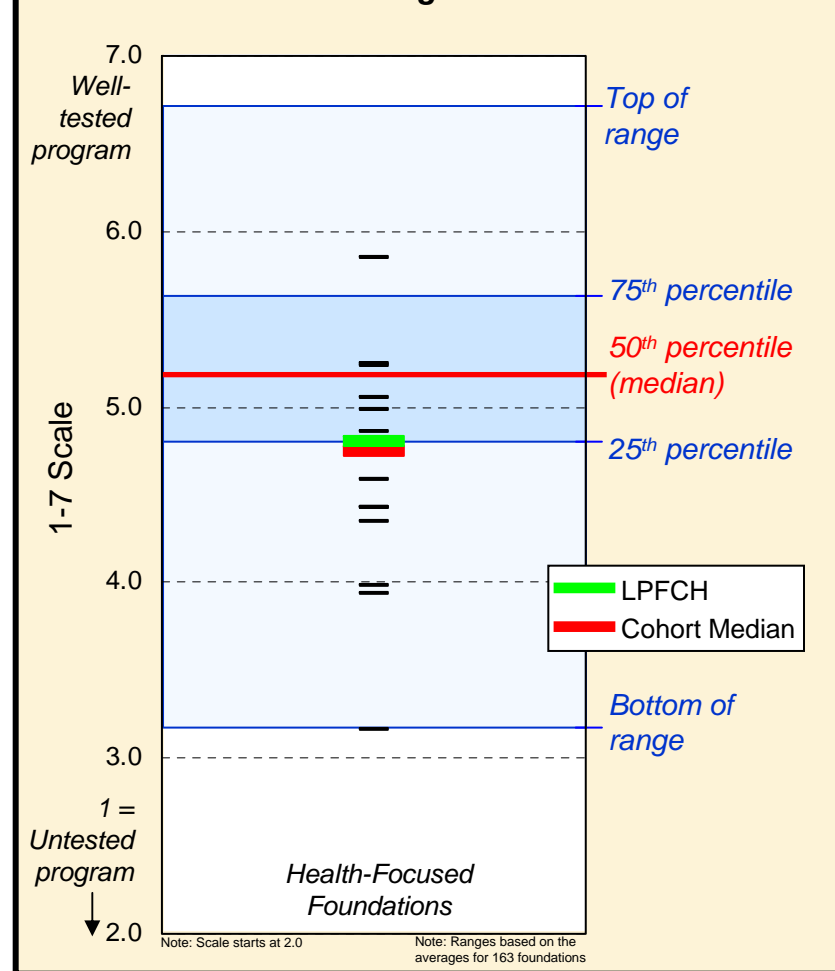
History of Grantee Programs

The majority of LPFCH grantees report that the programs funded by the Foundation are 10 years old or younger. The programs funded are described by grantees as less well-tested than programs funded by other foundations, and as well-tested as programs funded by the median health-focused foundation.

Length of Time Which Grantees Have Regularly Conducted the Funded Programs

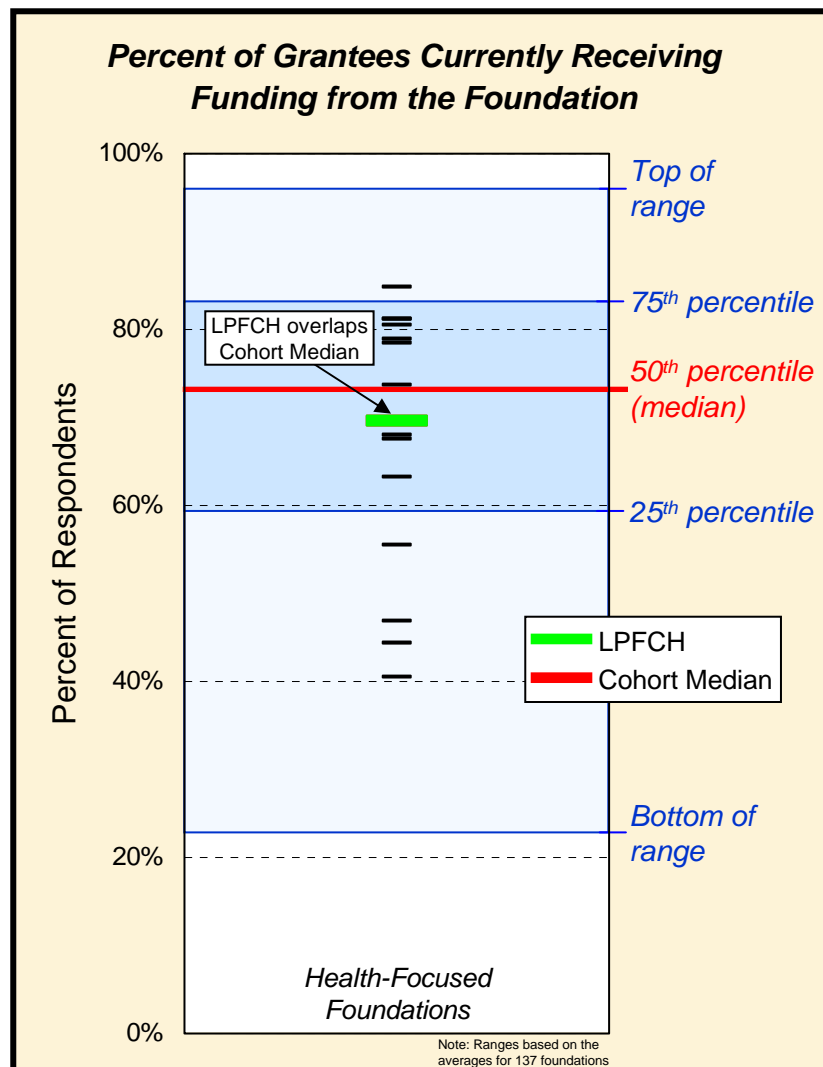


Level of Testing of the Funded Programs



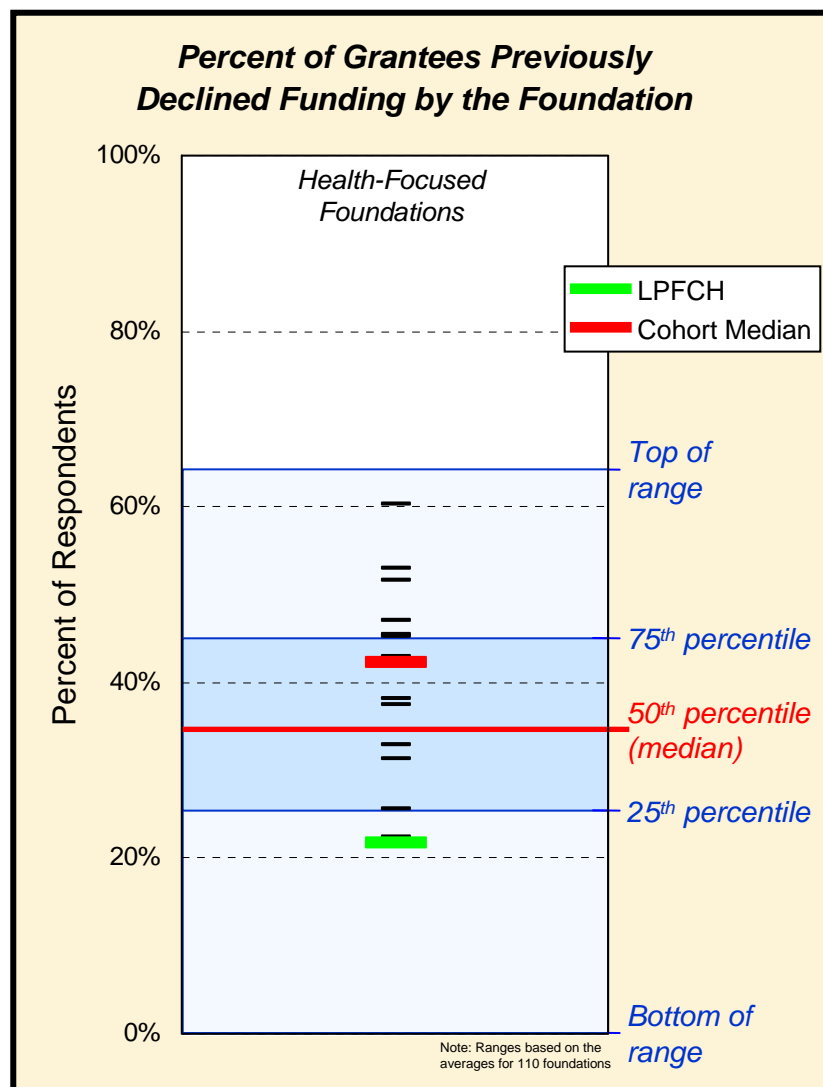
Funding Status

Seventy percent of LPFCH respondents were currently receiving funding from the Foundation at the time they completed the survey.



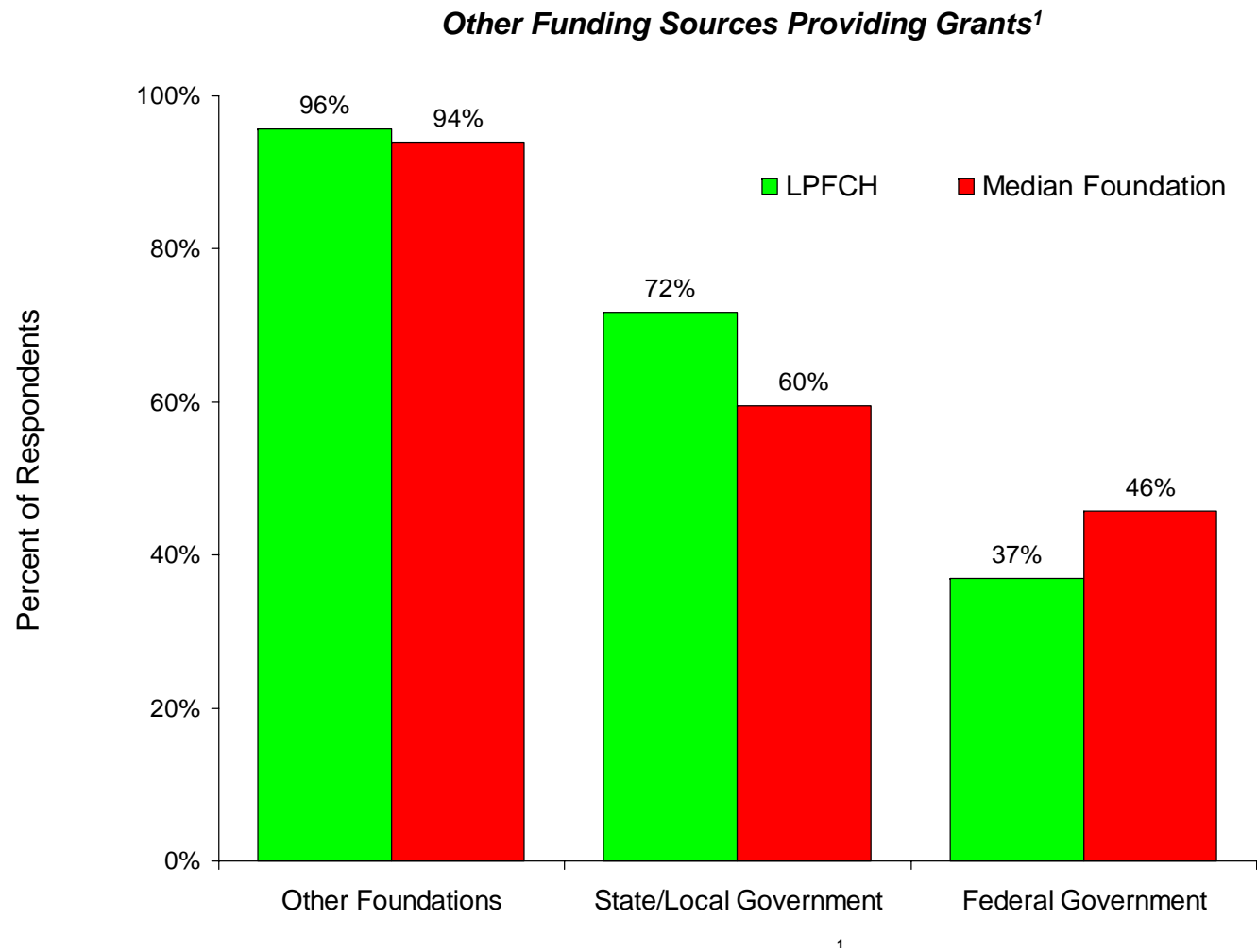
Grantees Previously Declined Funding

Twenty-two percent of LPFCH grantees report having previously been declined funding from the Foundation.



Other Sources of Grants

A higher proportion of LPFCH grantees receive state/local funding than is typical.

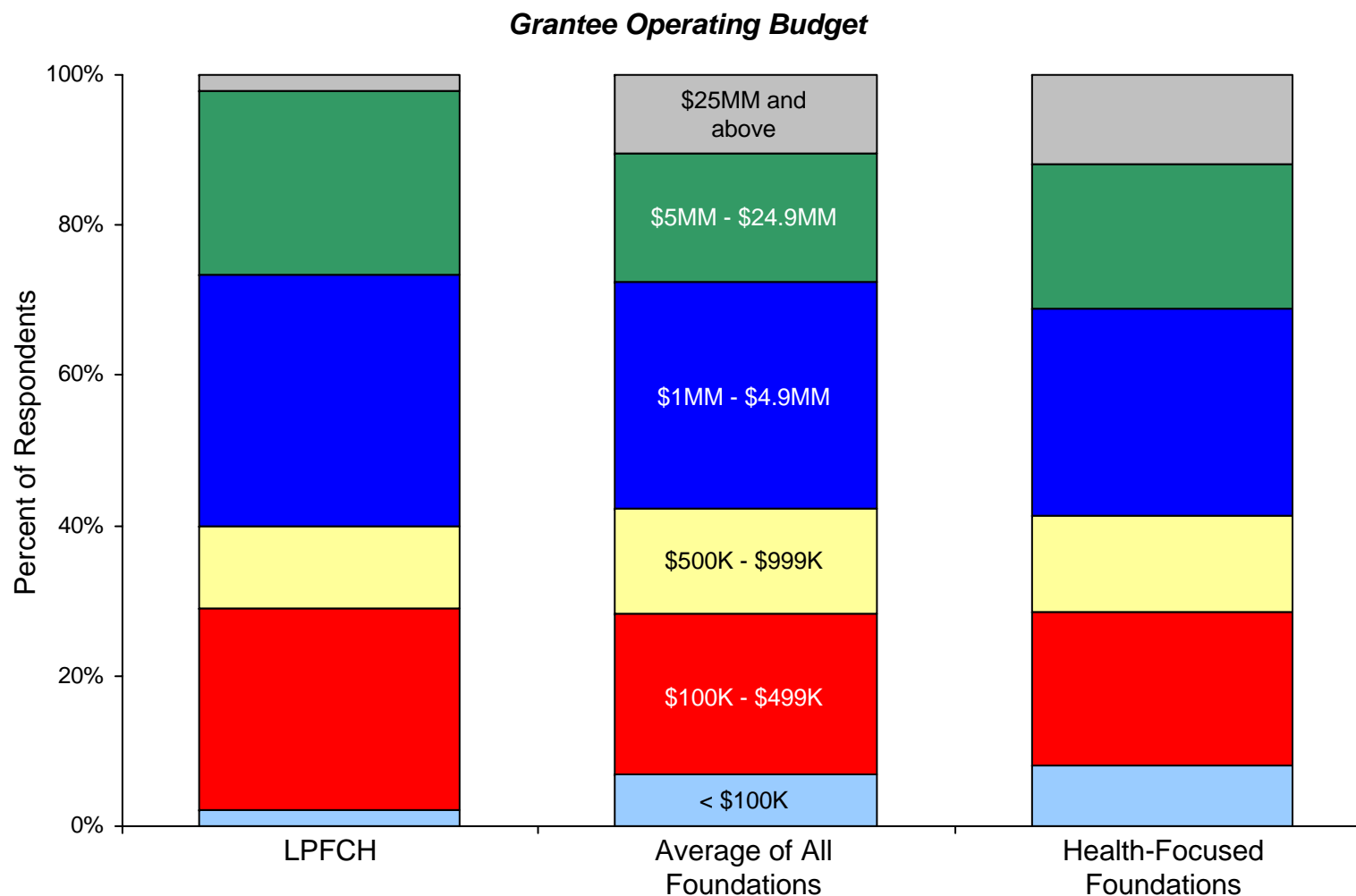


1: Grantees were asked only about these three funding sources.

Note: Cohort not shown because of changes to the survey instrument. This chart includes data about 25 foundations.

Grantee Operating Budget

LPFCH grantees are larger (in terms of median operating budget) than grantees of other foundations in our sample.



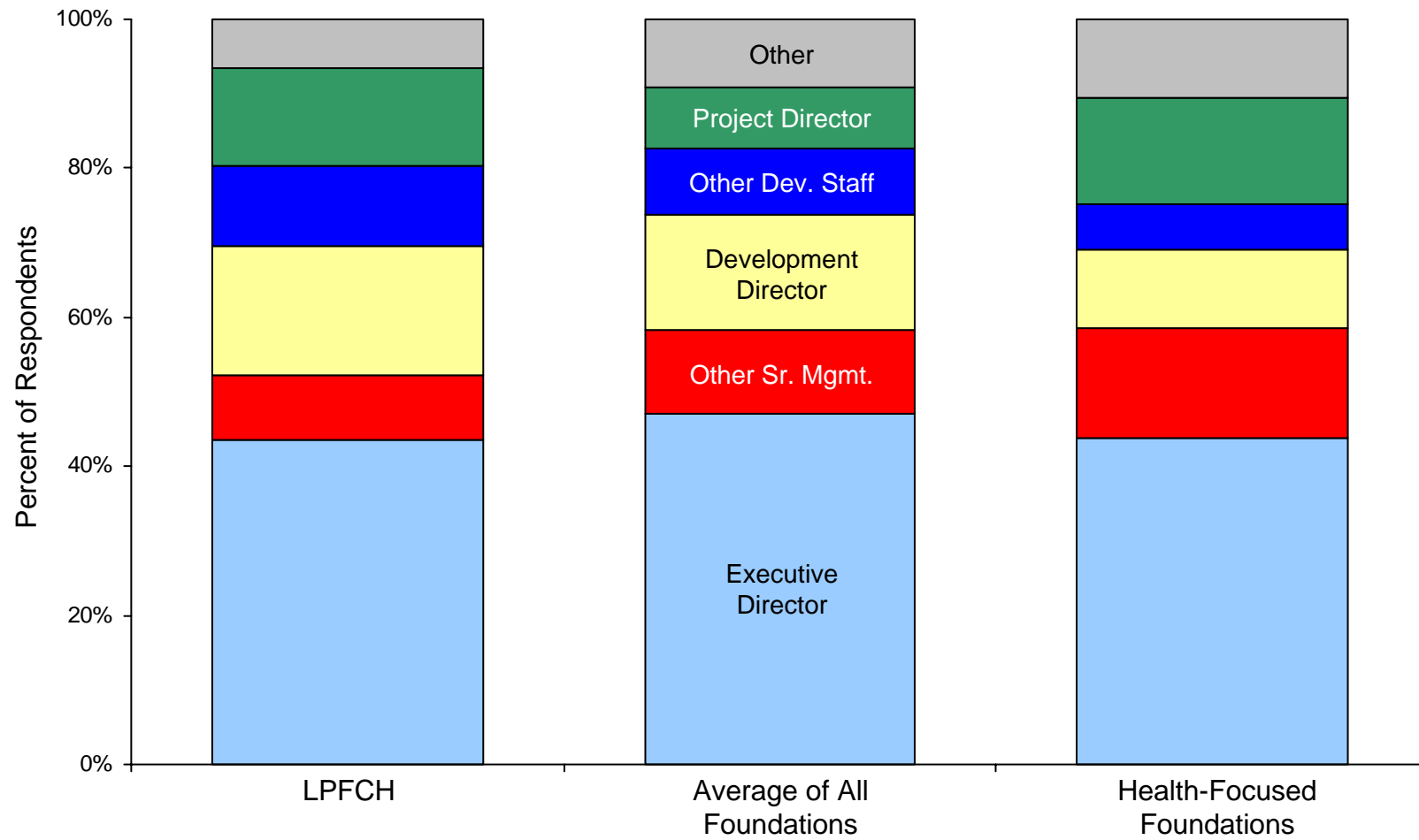
Population Average \$8.6MM
Population Median \$1.7MM

Population Average \$45.7MM
Population Median \$1.2MM

Population Average \$95.5MM
Population Median \$1.3MM

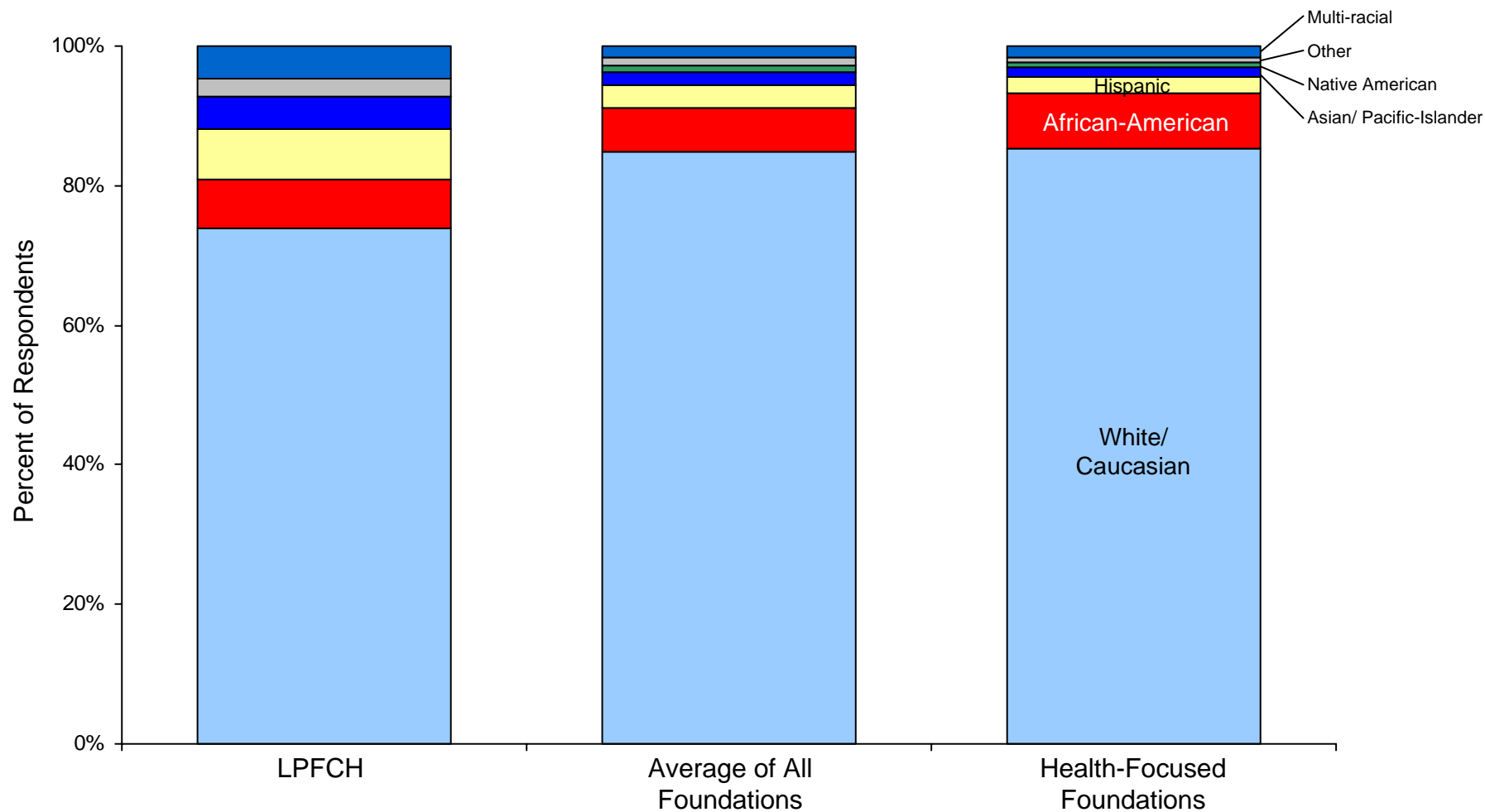
Job Title of Respondents

Job Title of Survey Respondents



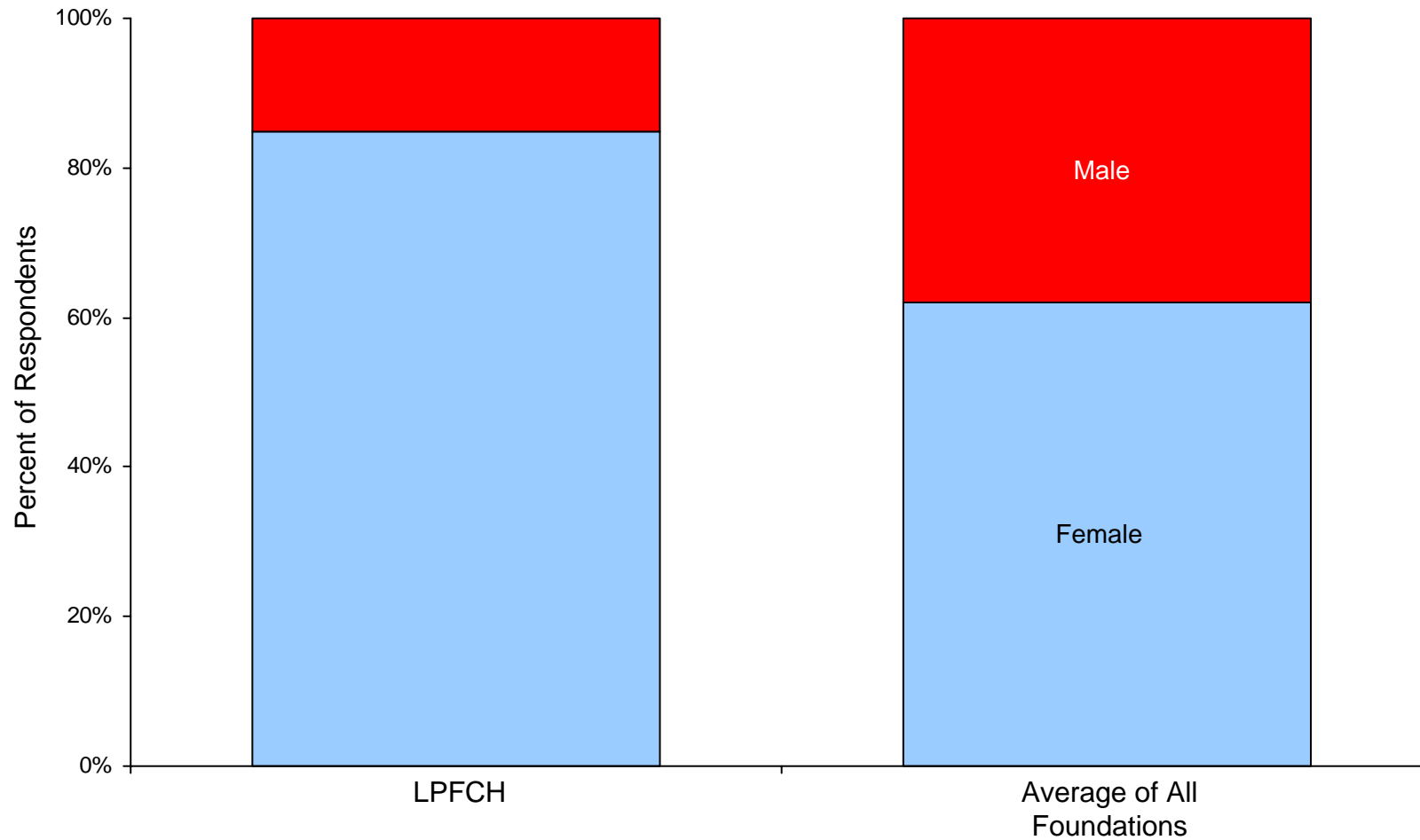
Ethnicity of Respondents

Ethnicity of Survey Respondents



Gender of Respondents

Gender of Survey Respondents



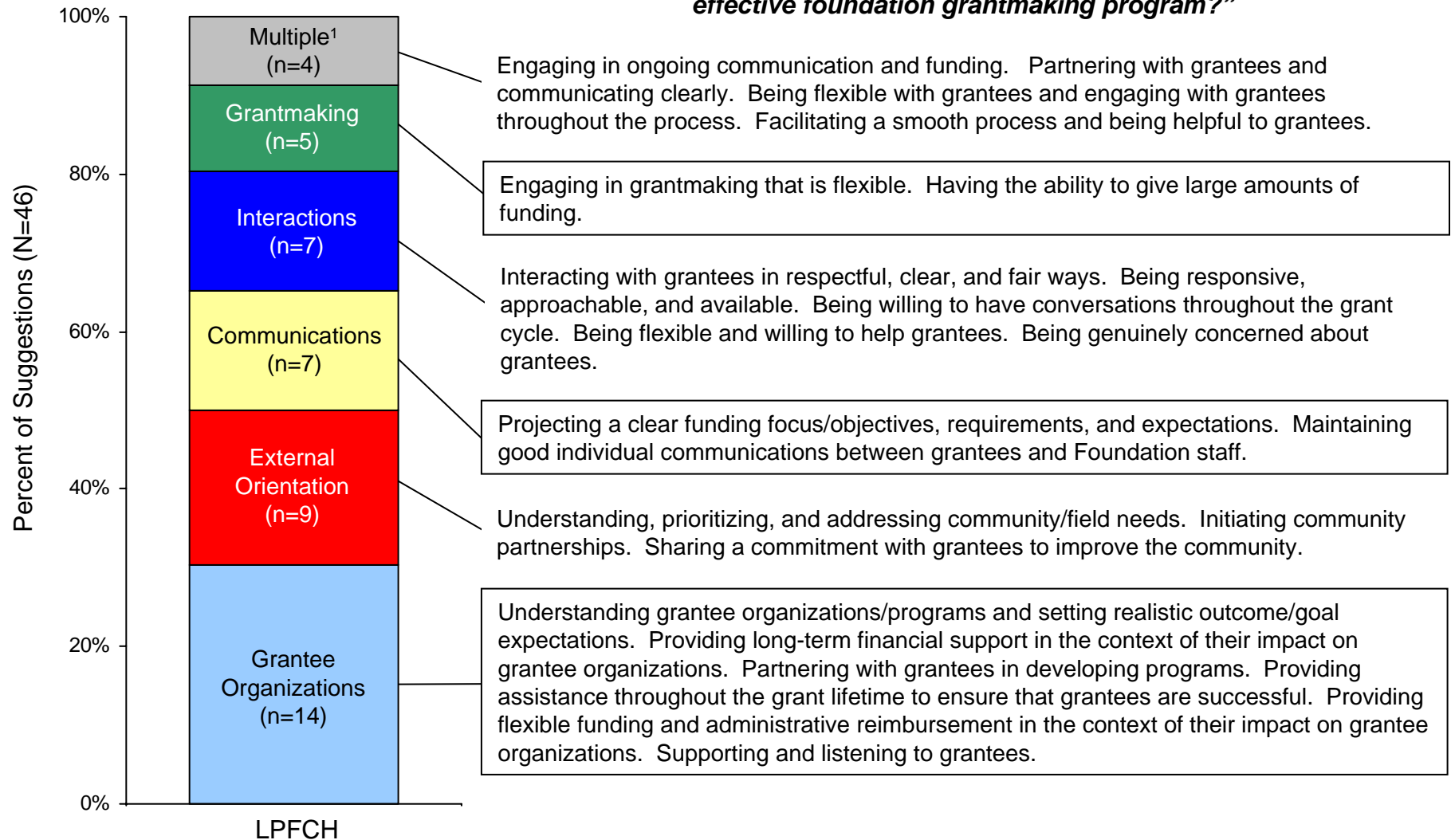
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Characteristics of Effective Foundation Grantmaking Programs (1)

LPFCH grantees were asked to comment on the most important quality or characteristic of an effective foundation grantmaking program. CEP characterized the 46 comments provided by grantees into common areas, and summaries of the comments are presented below.

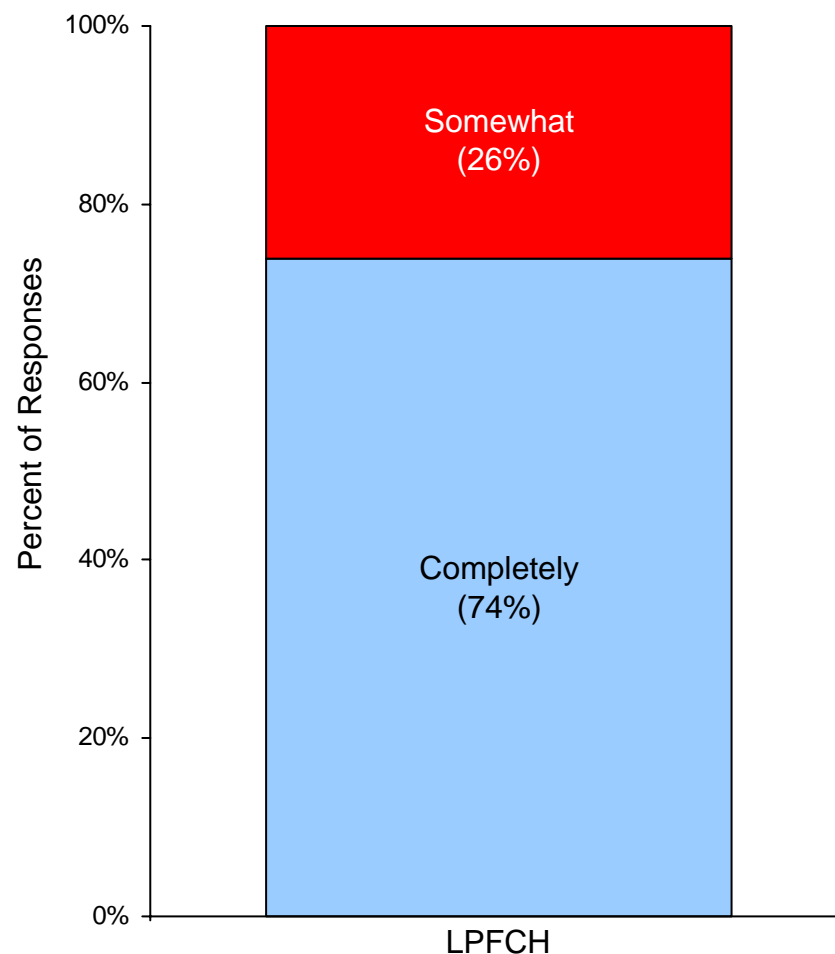
“In general, what is the most important quality or characteristic of an effective foundation grantmaking program?”



Characteristics of Effective Foundation Grantmaking Programs (2) Grantee Perception Report®

LPFCH grantees were asked if the Foundation exemplifies the quality or characteristic they listed as most important for an effective foundation grantmaking program. All LPFCH grantees rate the Foundation as “completely” or “somewhat” exemplary of the characteristic they listed.

“Do you feel the Foundation exemplifies this quality or characteristic?”



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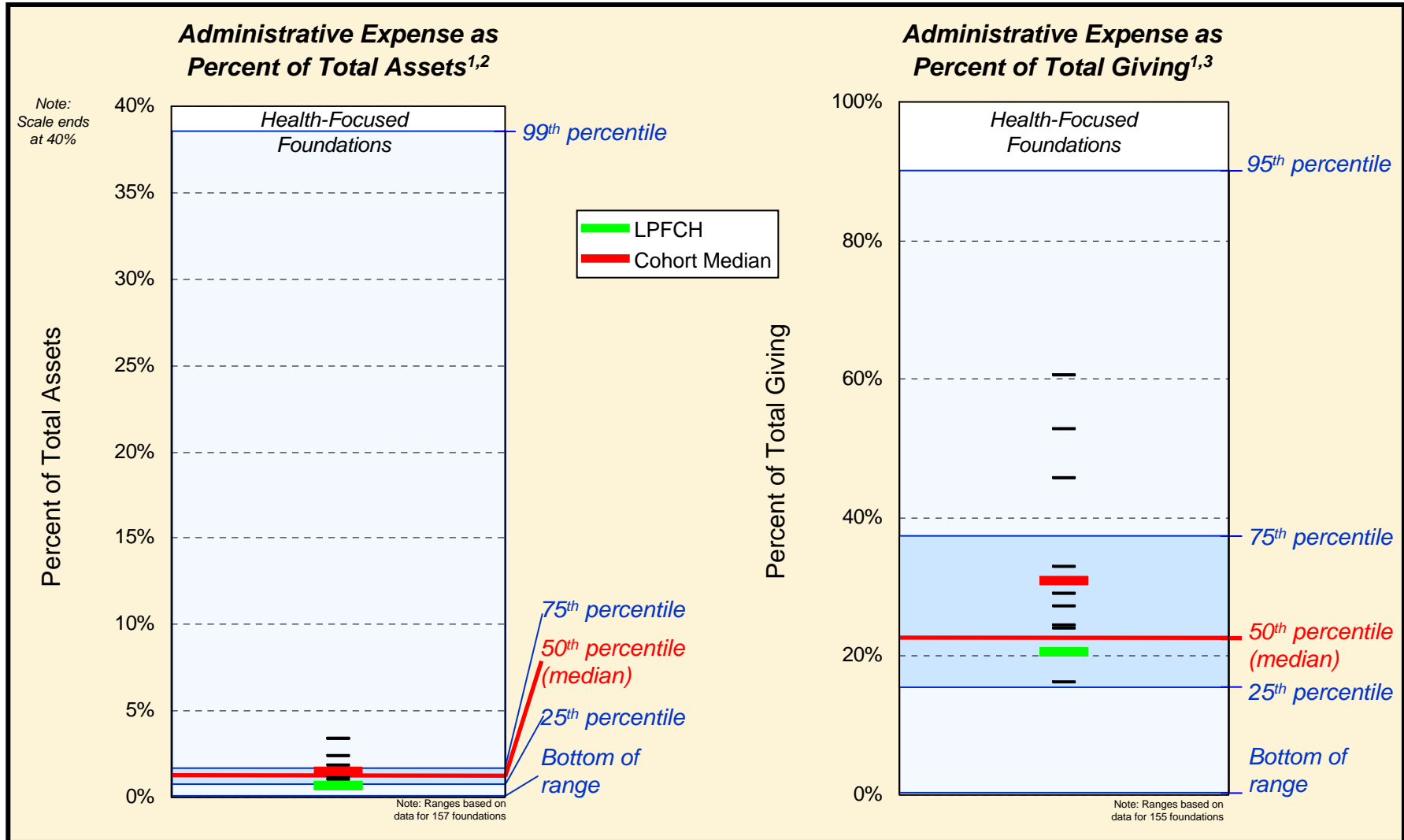
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Foundation Operational Benchmarking

- ◆ The following section is an excerpt of CEP's Operational Benchmarking Report.
 - It contains charts based on data supplied by foundations that subscribe to the GPR and the Operational Benchmarking Report (OBR). This data is both from IRS tax filings as well as self-reported information.
- ◆ These pages are intended to provide context to the foundation in thinking about its GPR results relative to its grantmaking and staffing.
 - Foundations of different sizes and focus choose to structure their foundations differently – so, as with all the information contained in this GPR, the foundation should interpret data in this section in light of its unique goals and strategy.

Total Administrative Expense

LPFCH spends a below median amount on administrative expenses as a percentage of total assets and spends a median amount on administrative expenses as a percentage of total giving, though lower than the median health-focused foundation.



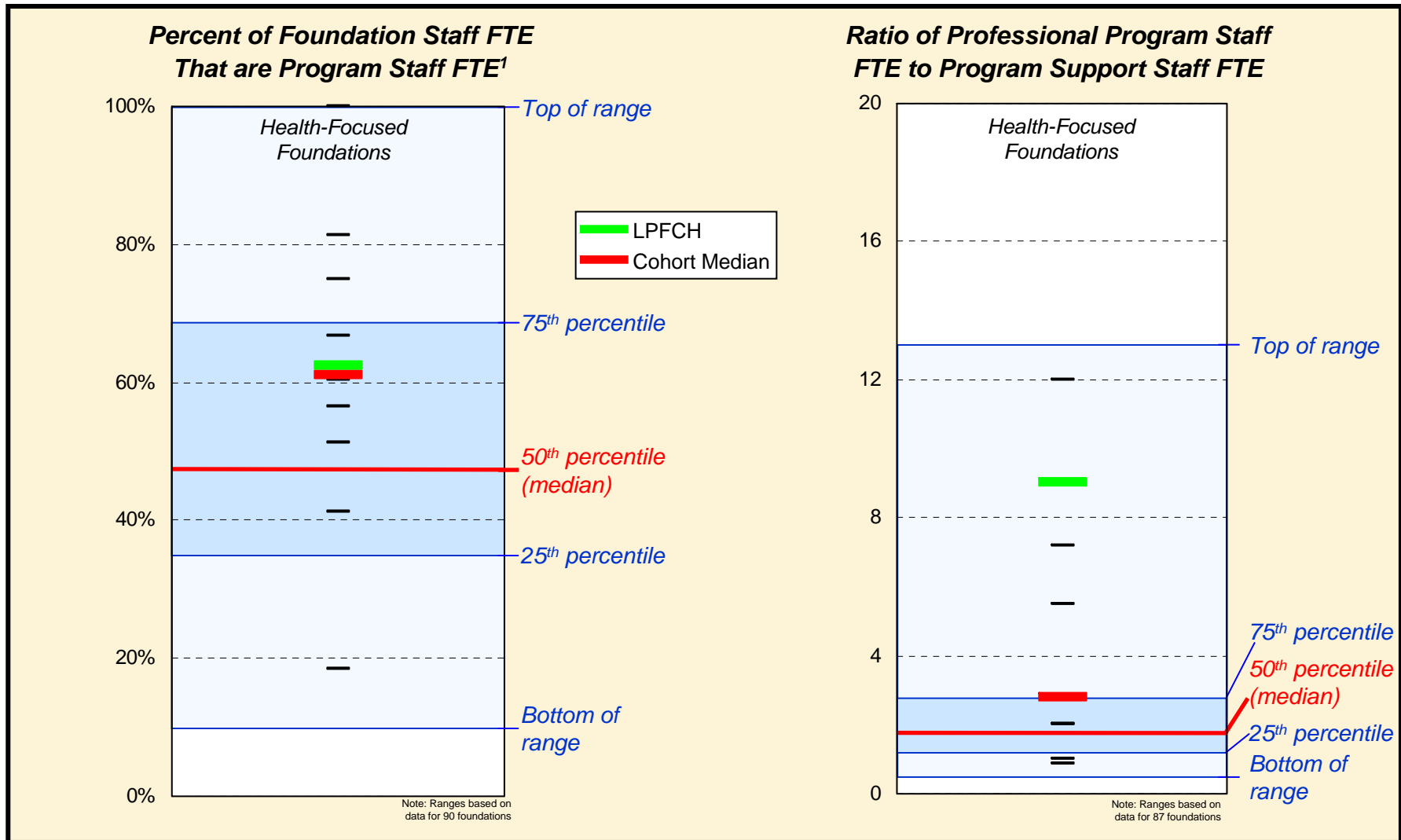
1: Total assets is in Box I on the 990-pf (line 21 on the 990), total administrative expense is line 24a (line 44a subtracting 22a on the 990), and total giving is line 25d (22a on the 990). All data is from most recent tax filings available (2003 and 2004).

2: Excludes two values of over 40%.

3: Excludes seven values of over 100%.

Program Staff

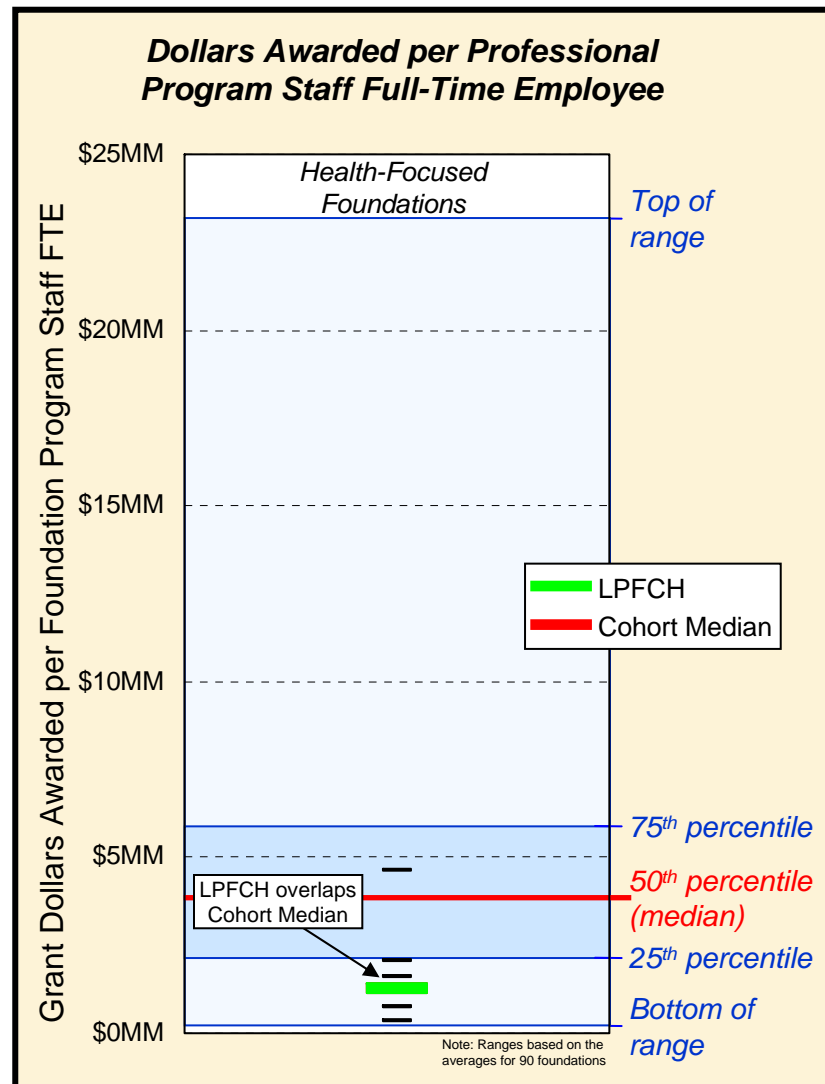
Sixty-three percent of LPFCH staff full-time employees are program staff full-time employees, and there are more professional program staff to program support staff at LPFCH.



1: Program Staff FTE refers to both professional program staff FTE and program support FTE.
Source: Self-reported data provided by LPFCH and other GPR and Operational Benchmarking Report (OBR) subscribers from 2003-2005 survey rounds.

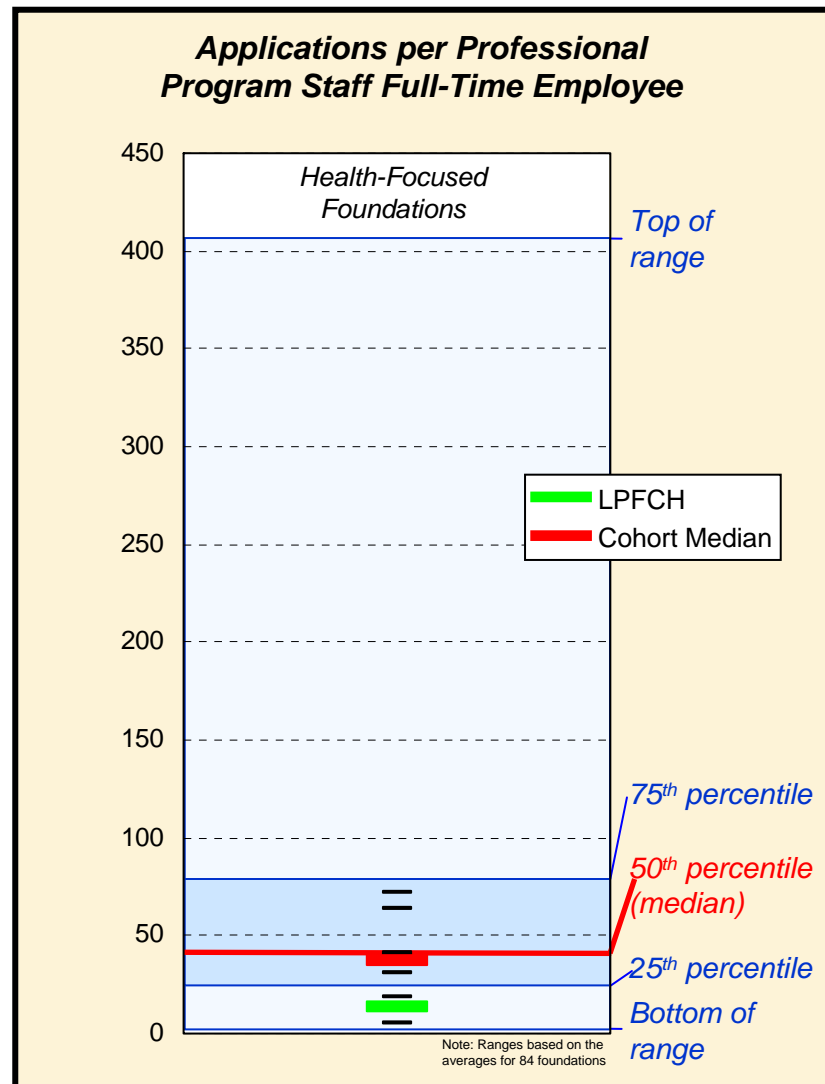
Staff to Giving Ratio

LPFCH awards a below median number of dollars per professional program staff full-time employee.



Program Staff Load (1)

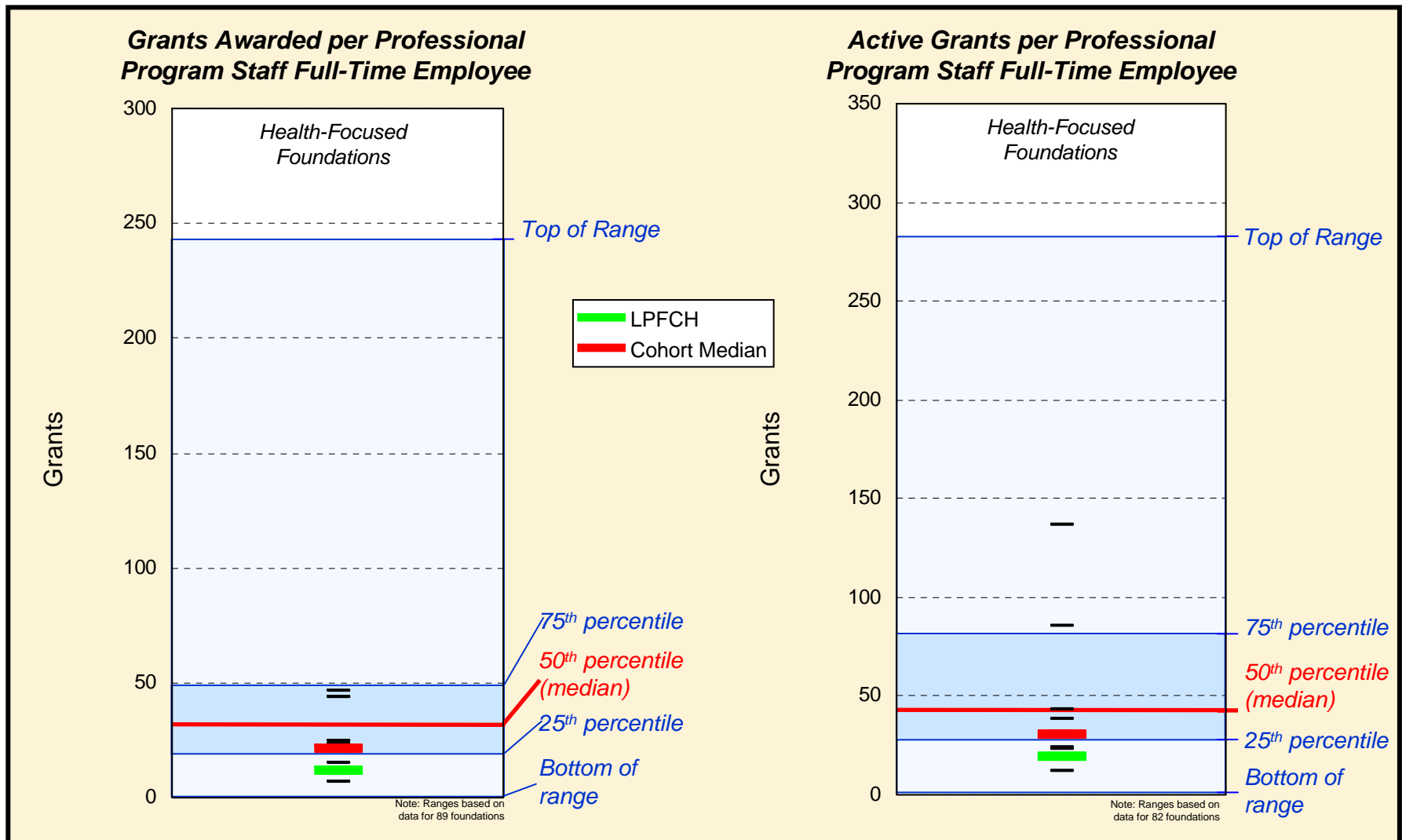
LPFCH staff have a smaller number of applications per professional program staff full-time employee.



Source: Self-reported data provided by LPFCH and other GPR and Operational Benchmarking Report (OBR) subscribers from 2003-2005 survey rounds.

Program Staff Load (2)

LPFCH is below the median in the number of grants awarded per professional program staff full-time employee and active grants per professional program staff full-time employee.



Source: Self-reported data provided by LPFCH and other GPR and Operational Benchmarking Report (OBR) subscribers from 2003-2005 survey rounds.

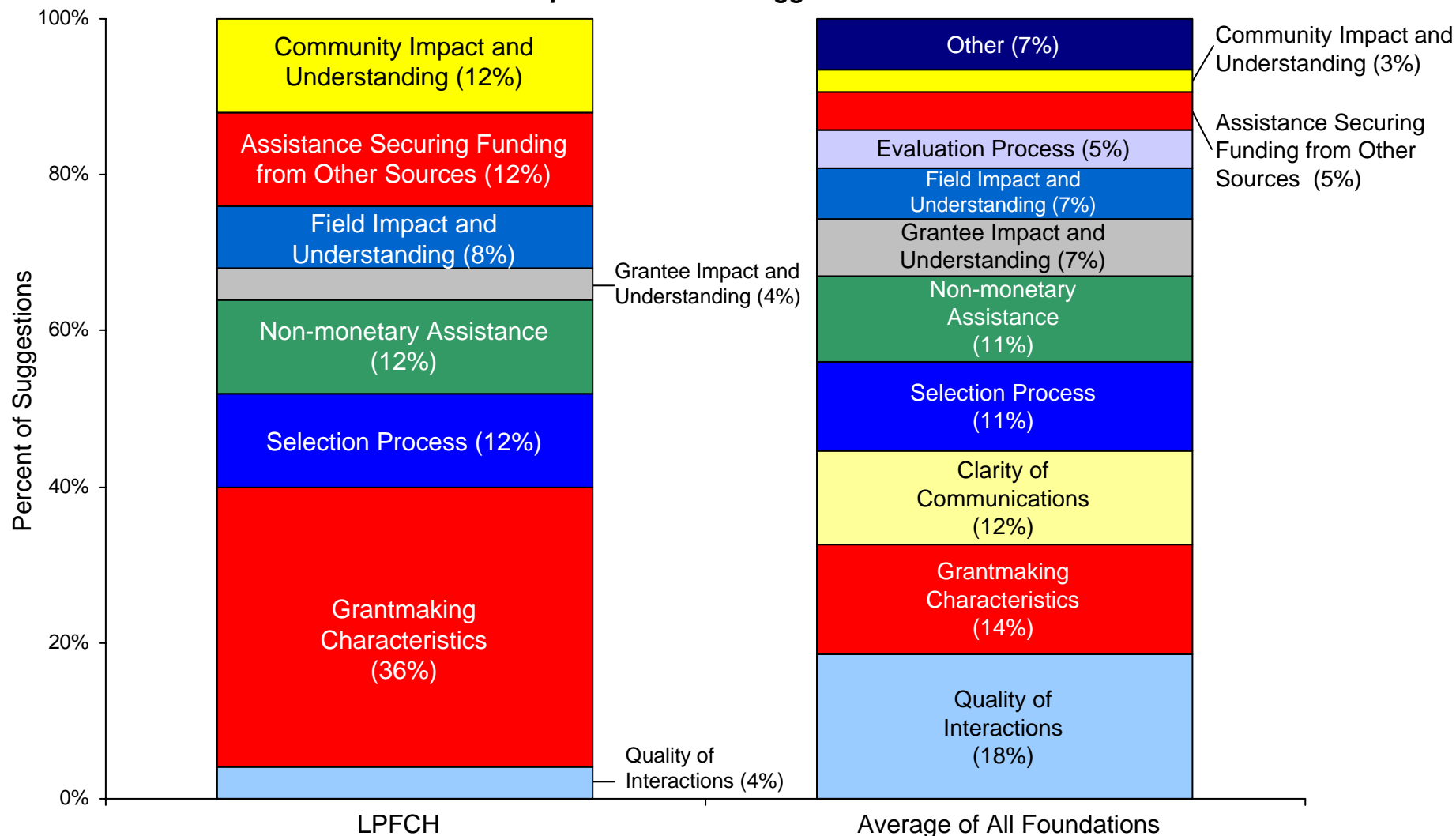
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Grantee Suggestions for the Foundation (1)

Grantees were asked to provide any suggestions for how the Foundation could improve. A greater than typical proportion of LPFCH grantees' suggestions concern grantmaking characteristics.

Topics of Grantee Suggestions



Grantee Suggestions for the Foundation (2)

The chart below shows the areas in which LPFCH grantees made suggestions for the Foundation's improvement.

Topic of Grantee Suggestion	% of LPFCH Grantee Suggestions	% Average Foundation Suggestions	LPFCH Grantee Suggestions
Grantmaking Characteristics	36%	14%	"We only hate that we need to take a year off from our funding – but trust they will return as a significant supporter." "Provide general operating support." "Lift limitations, such as age restriction." "Offer long-term funding for operating costs of critical services..." "[Offer] multi-year funding." "[Offer] funding for technical assistance such as outcomes evaluation and sustainability planning." "It would be nice if the Foundation were to become a sustained funder." "Broaden guidelines, so we can apply again!" "[The Foundation should] review [their] forms."
Selection Process	12%	11%	"A shorter timeframe between LOI to funding decision." "The budget and financial information part of the grant application was fairly challenging to complete." "It would have been helpful if there was flexibility on the date the check was issued. Being able to delay by only a few weeks would have significantly improved our agency's financial standing."
Non-monetary Assistance	12%	11%	"I would love to see gatherings/seminars open to former grantees as well as current grantees." "Think about a collaborative initiative for grantees that could be innovative and 5 years long to document impact." "More convenings of grantees."
Assistance Securing Funding from Other Sources	12%	5%	"It would be nice if the Foundation published like-minded funders that they may know about in the fields that they focus on and fund." "Help organizations identify and leverage grant to obtain additional/sustenance funding from other funders."
Community Impact and Understanding	12%	3%	"Increase funding to San Mateo County agencies." "Reach out more to ethnic communities. Help promote and encourage culturally sensitive services." "Hire staff with experience working in communities that they tend to fund programs in."

Grantee Suggestions for the Foundation (3)

Topic of Grantee Suggestion	% of LPFCH Grantee Suggestions	% Average Foundation Suggestions	LPFCH Grantee Suggestions
Field Impact and Understanding	8%	7%	“The Foundation encourages/supports year-long programming for [the 9 to 12] age group, but the reality is that in low income communities it’s hard to retain youth for this long. There are other models out there that are appropriate for this age group that I think the Foundation could support.” “I would challenge [the Foundation] to think about children in substance abusing families. There are little to no programs or support for them, and they are at so high risk.”
Grantee Impact and Understanding	4%	7%	“Continue funding agencies that perform well under their grant performance measures for longer terms.”
Quality of Interactions	4%	18%	“Follow up with grantees.”

Total number of LPFCH Grantee Suggestions	25
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Review of Findings

Chart shows LPFCH's (◆) percentile rank among all foundations in comparative set. The median of the health-focused foundation cohort is also depicted (◆).

Indicator	Percentile					Description
	0th	25th	50th	75th	100th	
Impact on the Field						Grantees were asked to rate the foundation's impact on their fields.
Impact on the Community						Grantees were asked to rate the foundation's impact on their local communities.
Impact on the Grantee Organization						Grantees were asked to rate the foundation's impact on their organizations.
Satisfaction						Grantees were asked to rate their overall satisfaction with their funder.
Interactions						This summary includes grantee ratings of foundation fairness, responsiveness, and grantee comfort approaching the foundation if a problem arises.
Clarity of Communications of Goals and Strategy						Grantees were asked to rate the clarity of the foundation's communication of its goals and strategy.
Non-Monetary Assistance						This summary includes the frequency of provision and ratings of helpfulness of 14 individual activities, including management and field-related assistance.
Assistance Securing Funding from Other Sources						This summary includes the frequency of provision of foundation assistance in obtaining funding from other sources, and ratings of the impact of those efforts.
Selection Process						Grantees were asked to rate the helpfulness of the foundation's selection process for their organizations.
Reporting and Evaluation Processes ¹						Grantees were asked to rate the helpfulness of the foundation's reporting and evaluation processes for their organizations.
Dollar Return on Grantee Administrative Hours						This summary is calculated by dividing the dollar value of individual grants by the time required of grantees to fulfill the foundation's administrative requirements.

1: Cohort not shown because of changes to the survey instrument.

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Profiles of Foundations Included in Comparative Set (1)

Foundation	Description
The Abell Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2005 • Private, Family Foundation with assets of \$208MM and giving of \$8MM (as of 2003) • The foundation's purpose is to support the enhancement of the quality of life in Baltimore and Maryland.
The Ahmanson Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2004 • Private, Family Foundation with assets of \$832MM and giving of \$32MM (as of 2003) • The foundation gives in the areas of arts and culture, the disadvantaged, education, the environment, and medicine and health care, primarily in California.
Alfred P. Sloan Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2003 • Private, Non-Family Foundation with assets of \$1.4B and giving of \$65MM (as of 2003) • The foundation funds initiatives based on 1) Science and Technology research; 2) Standard of Living and Economic Performance; and 3) Education and Careers in Science and Technology, across the U.S.
Alphawood Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2004 • Private, Family Foundation with assets of \$142MM and giving of \$7MM (as of 2004) • Primary areas of funding include the arts, arts education for children, institutional advocacy, domestic violence intervention programs, architecture, and preservation, primarily in Illinois and Indiana.
Altman Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2004 • Private, Non-Family Foundation with assets of \$235MM and giving of \$11MM (as of 2003) • The foundation focuses on initiatives such as arts and culture, education, health, and strengthening communities, primarily in New York.
The Ambrose Monell Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2005 • Private, Family Foundation with assets of \$221MM and giving of \$10MM (as of 2003) • The foundation's purpose is to support religious, charitable, scientific, literary, and educational uses and purposes in New York, throughout the United States, and around the world.
Amelia Peabody Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2005 • Private, Non-Family Foundation with assets of \$168MM and giving of \$7MM (as of 2003) • The foundation's purpose is to support educational initiatives focused on disadvantaged youth living in Massachusetts.
Amon G. Carter Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2004 • Private, Family Foundation with assets of \$326MM and giving of \$16MM (as of 2003) • The foundation funds the arts, education, health care, social service and youth agencies, programs for the aged, and civic and community endeavors that enhance the quality of life, primarily in Texas.
Andersen Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2005 • Private Foundation with assets of \$552MM and giving of \$25MM (as of 2003) • The foundation's purpose is to support education, medical research, and children and youth, across the U.S.
Ann Arbor Area Community Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2005 • Community Foundation with assets of \$34MM and giving of \$1MM (as of 2004) • The foundation's purpose is to support education, social services, the environment, culture, community development, and health and wellness, primarily in Michigan.
The Annenberg Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2004 • Private, Family Foundation with assets of \$2.7B and giving of \$213MM (as of 2004) • The foundation supports education (including public school restructuring and reform), the arts and culture, and civic affairs, primarily in Pennsylvania and California.
The Anschutz Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2005 • Private, Family Foundation with assets of \$411MM and giving of \$21MM (as of 2003) • The foundation's purpose is to support public policy and traditional family values, across the U.S.
The Assisi Foundation of Memphis	<ul style="list-style-type: none"> • Surveyed in Spring 2004 and Fall 2005 • Health Conversion Foundation with assets of \$203MM and giving of \$7MM (as of 2003) • The foundation funds education, health & human services, community improvement, and religion, primarily in Tennessee.

Profiles of Foundations Included in Comparative Set (2)

Foundation	Description
The AVI CHAI Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2005 • Private, Non-Family Foundation with assets of \$643MM and giving of \$24MM (as of 2004) • The mission of the foundation is to encourage those of the Jewish faith towards greater commitment to Jewish observance and lifestyle by increasing their understanding, appreciation, and practice of Jewish traditions, customs, and laws; and to encourage mutual understanding and sensitivity among Jews of different religious backgrounds and commitments to observance, on an international basis.
Baptist Community Ministries	<ul style="list-style-type: none"> • Surveyed in Spring 2004 • Health Conversion Foundation with assets of \$211MM and giving of \$12MM (as of 2003) • The foundation serves the physical and spiritual needs of the Louisiana community by funding in the areas of education, health, public safety, and government oversight.
Barr Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2003 • Private, Family Foundation with assets of \$803MM and giving of \$3MM (as of 2003) • Primary areas of funding are education and the environment in Massachusetts.
Bill & Melinda Gates Foundation	<ul style="list-style-type: none"> • Education program area grantees surveyed in Fall 2004 • Private, Family Foundation with assets of \$27B and giving of \$1.2B (as of 2003) • The foundation clusters its giving around four program areas: global health, education, libraries, and the Pacific Northwest, on an international basis.
Blandin Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2005 • Private, Non-Family Foundation with assets of \$408MM and giving of \$8MM (as of 2004) • The foundation's purpose is to support and strengthen rural communities throughout Minnesota and the Grand Rapids area.
Blue Cross Blue Shield of Massachusetts Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2004 • Private, Non-Family Foundation with assets of \$50MM and giving of \$4MM (as of 2003) • The mission of the foundation is to expand access to health care by broadening health coverage and reducing barriers to care, primarily in Massachusetts.
The Boston Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2003 and Fall 2005 • Community Foundation with assets of \$572MM and giving of \$48MM (as of 2003) • Key categories of funding include health, education, jobs/income, housing, active citizenship, capacity building, and community fabric, primarily in Massachusetts.
Bradley Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2004 • Private, Non-Family Foundation with assets of \$580MM and giving of \$29MM (as of 2003) • The foundation funds citizenship efforts as reflected in demonstrations with national significance; public policy research; or media and public education undertakings, on an international basis.
Bradley-Turner Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2004 • Private, Family Foundation with assets of \$190MM and giving of \$24MM (as of 2003) • The foundation mainly funds higher education, religious associations, and youth and social service agencies, primarily in Georgia.
The Broad Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2005 • Private, Family Foundation with assets of \$489MM and giving of \$18MM (as of 2003) • The foundation funds primarily in the fields of art, education, science, and civic development.
The Brown Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2003 • Private, Family Foundation with assets of \$1.3B and giving of \$39MM (as of 2004) • The foundation supports the encouragement of and assistance to education, arts, and community service projects focused on the needs of children and youth, primarily in Texas.
Bush Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2004 • Private, Non-Family Foundation with assets of \$651MM and giving of \$33MM (as of 2003) • The foundation supports the arts, education, human services, healthcare, and minority opportunity, primarily in Minnesota, North Dakota and South Dakota.
The California Wellness Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2003 • Health Conversion Foundation with assets of \$1.0B and giving of \$40MM (as of 2003) • The foundation's mission is to improve the health of the people of California by making grants for health promotion, wellness education, and disease prevention.

Profiles of Foundations Included in Comparative Set (3)

Foundation	Description
Carnegie Corporation of New York	<ul style="list-style-type: none"> • Surveyed in Fall 2003 • Private, Non-Family Foundation with assets of \$1.8B and giving of \$75MM (as of 2003) • The foundation funds 1)Education, including teacher education and liberal arts education; 2)International Peace and Security; 3)International Development; and 4)Democracy, on an international basis.
Carrie Estelle Doheny Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2005 • Private, Non-Family Foundation with assets of \$167MM and giving of \$7MM (as of 2003) • The foundation's purpose is to support the advancement of education, medicine, and religion, and to improve health, and social and human services to the disabled, the economically disadvantaged, the ill, and senior citizens, primarily in California.
The Case Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2005 • Private, Family Foundation with assets of \$40MM and giving of \$7MM (as of 2003) • The foundation's goals are to assist poverty-stricken families and children, and improve communities by promoting sustainable economic development, cultural and religious tolerance, civic engagement and volunteerism, and innovative approaches to health care.
The Champlin Foundations	<ul style="list-style-type: none"> • Surveyed in Spring 2005 • Private, Non-Family Foundation with assets of \$395MM and giving of \$17MM (as of 2003) • The foundation primarily gives for conservation; higher, secondary, and other education, including libraries; health and hospitals; cultural activities, including historic preservation; scientific activities; and social and family services, including programs for youth, primarily in Rhode Island.
Charles and Helen Schwab Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2005 • Private, Family Foundation with assets of \$153MM and giving of \$7MM (as of 2004) • The foundation's funding addresses issues such as homelessness, youth development, poverty prevention, substance abuse, and learning disabilities.
Charles and Lynn Schusterman Family Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2004 • Private, Family Foundation with assets of \$80MM and giving of \$3MM (as of 2003) • The foundation primarily emphasizes religion, education, federated giving programs, and international affairs in its giving, which is on an international basis.
Charles Stewart Mott Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2004 • Private, Family Foundation with assets of \$2.4B and giving of \$104MM (as of 2003) • The foundation's mission is to support efforts that promote an equitable and sustainable society in the areas of civil society, the environment, and poverty, on an international basis.
The Clark Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2003 • Private, Family Foundation with assets of \$493MM and giving of \$19MM (as of 2004) • The foundation supports health, educational, youth, cultural, environmental, and community organizations and institutions, primarily in New York.
Claude Worthington Benedum Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2005 • Private, Family Foundation with assets of \$337MM and giving of \$12MM (as of 2003) • The foundation provides funding to the arts & culture, community and economic development, education, and health & human services, to encourage human development in West Virginia and Southwestern Pennsylvania.
The Cleveland Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2003 • Community Foundation with assets of \$1.1B and giving of \$62MM (as of 2003) • The foundation awards grants in seven program areas: arts and culture, civic affairs, economic development, education, the environment, health, and social services, primarily in Ohio.
The Clowes Fund	<ul style="list-style-type: none"> • Surveyed in Fall 2005 • Private, Family Foundation with assets of \$72MM and giving of \$3MM (as of 2003) • The foundation was established to support education and the literary, fine, and performing arts. Social services are now a focus for support as well. Giving is primarily focused in the states of Indiana, Washington, Massachusetts and parts of northern New England.
The Collins Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2005 • Private, Family Foundation with assets of \$166MM and giving of \$7MM (as of 2003) • The foundation supports religious, educational, cultural, and scientific endeavors in the state of Oregon and assists in improving the quality of life in the state.
The Columbus Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2003 • Community Foundation with assets of \$447MM and giving of \$42MM (as of 2003) • The foundation funds the arts & humanities, urban affairs, conservation & environmental protection, education, health, mental health & the developmentally disabled, and social services, primarily in Ohio.

Profiles of Foundations Included in Comparative Set (4)

Foundation	Description
Community Foundation Silicon Valley	<ul style="list-style-type: none"> • Surveyed in Fall 2004 • Community Foundation with assets of \$307MM and giving of \$50MM (as of 2003) • The foundation funds education, health and social services, the fine and performing arts, community development and urban affairs, and the environment, primarily in California.
Connecticut Health Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2004 • Health Conversion Foundation with assets of \$133MM and giving of \$5MM (as of 2003) • The mission is to improve the health status of people by increasing access, promoting wellness, and encouraging the wise use of health care resources, primarily in Connecticut.
Daniels Fund	<ul style="list-style-type: none"> • Surveyed in Fall 2003 • Private, Family Foundation with assets of \$949MM and giving of \$30MM (as of 2003) • The foundation funds programs dealing with early childhood education, the elderly, homelessness and self-sufficiency, health, amateur athletics, and people with physical disabilities, primarily in Colorado, New Mexico, Utah and Wyoming.
The David and Lucile Packard Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2004 • Private, Family Foundation with assets of \$6B and giving of \$278MM (as of 2003) • The foundation gives in the areas of children, families and communities, population, science, and conservation, on an international basis.
Doris Duke Charitable Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2005 • Private, Non-Family Foundation with assets of \$1.6B and giving of \$53MM (as of 2003) • The foundation focuses its giving through four grant program areas: performing arts, medical research, land preservation for wildlife habitat, and child abuse prevention.
Dekko Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2005 • Private, Family Foundation with assets of \$220MM and giving of \$9MM (as of 2004) • The foundation's purpose is to support organizations and programs that concentrate on young people ages 0-18, primarily in Indiana, Iowa, and Alabama.
The Duke Endowment	<ul style="list-style-type: none"> • Surveyed in Fall 2005 • Private, Family Foundation with assets of \$2B and giving of \$105MM (as of 2003) • The foundation's mission is to serve the people of North Carolina and South Carolina by supporting selected programs of higher education, health care, children's welfare, and spiritual life.
Dyson Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2003 • Private, Family Foundation with assets of \$287MM and giving of \$14MM (as of 2003) • The foundation funds nonprofit organizations in the Mid-Hudson Valley of New York in a variety of fields, in addition to a national program in community pediatrics training.
E. Rhodes & Leona B. Carpenter Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2005 • Private Foundation with assets of \$202MM and giving of \$9MM (as of 2003) • The foundation's purpose is to support theological educational, the performing arts, museums, and hospices, across the U.S.
Eden Hall Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2004 • Private, Non-Family Foundation with assets of \$161MM (as of 2003) • The foundation supports programs in higher education, prevention of disease, social welfare, and improvement of the conditions of the poor and needy, primarily in Pennsylvania.
The Educational Foundation of America	<ul style="list-style-type: none"> • Surveyed in Fall 2003 • Private, Family Foundation with assets of \$204MM and giving of \$10MM (as of 2003) • The foundation awards grants for the arts, education, energy and the environment, reproductive health and rights, population, and education programs benefiting Native Americans, across the U.S.
EI Pomar Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2004 • Private, Non-Family Foundation with assets of \$441MM and giving of \$12MM (as of 2003) • The foundation awards grants to nonprofit organizations for public, educational, arts & humanities, health, and welfare (child welfare, the disadvantaged, and housing) purposes, primarily in Colorado.
Endowment for Health	<ul style="list-style-type: none"> • Surveyed in Spring 2004 • Health Conversion Foundation with assets of \$78MM and giving of \$503,703 (as of 2003) • The mission of the foundation is to improve New Hampshire residents' health by funding projects dealing with complete physical, mental, and social well-being.

Profiles of Foundations Included in Comparative Set (5)

Foundation	Description
Evelyn and Walter Haas, Jr. Fund	<ul style="list-style-type: none"> • Surveyed in Spring 2004 • Private, Family Foundation with assets of \$517MM and giving of \$23MM (as of 2003) • The fund's emphasis is on strengthening children, youth, families, the elderly, neighborhoods, as well as promoting diversity and enhancing nonprofit leadership, primarily in California.
The F.B. Heron Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2003 • Private, Non-Family Foundation with assets of \$258MM and giving of \$9MM (as of 2003) • The fund emphasizes wealth-creation strategies for low-income families and communities: access to capital, childcare, community and enterprise development, and home ownership, across the U.S.
F.M. Kirby Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2003 • Private, Family Foundation with assets of \$434MM and giving of \$18MM (as of 2003) • The foundation is dedicated to providing support for education, health, community programs, historic preservation, religious organizations, social services, conservation, public policy organizations, and family planning, across the U.S.
The Fan Fox and Leslie R. Samuels Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2005 • Private, Non-Family Foundation with assets of \$179MM and giving of \$7MM (as of 2004) • The foundation's support is targeted to the betterment of the people of New York, primarily in the performing arts and improving access to healthcare.
Fannie Mae Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2004 • Private, Non-Family Foundation with assets of \$300MM and giving of \$46MM (as of 2003) • The foundation creates affordable homeownership and housing opportunities through innovative partnerships and initiatives that build healthy, vibrant communities, across the U.S.
The Ford Family Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2003 • Private, Family Foundation with assets of \$342MM and giving of \$19MM (as of 2003) • The mission of the foundation is to help individuals, through organized learning opportunities, to be contributing and successful citizens, and to enhance the vitality of rural communities in Oregon and Siskiyou County, California.
The Frist Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2004 • Health Conversion Foundation with assets of \$178MM and giving of \$9MM (as of 2003) • The fund awards grants to strengthen the capacity of Nashville, Tennessee-based nonprofit agencies in order to serve the community.
The GAR Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2004 • Private Foundation with assets of \$164MM and giving of \$6MM (as of 2003) • The foundation funds in the areas of arts, economics, the economically disadvantaged, education, homelessness, and human services, primarily in Ohio.
Gates Family Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2005 • Private, Family Foundation with assets of \$237MM and giving of \$9MM (as of 2003) • The foundation's purpose is to support and enhance the quality of life of those who live and work in Colorado through activities that promote broad education, self-sufficiency, connection to nature, and cultural appreciation.
The George Gund Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2003 • Private, Family Foundation with assets of \$448MM and giving of \$19MM (as of 2003) • The foundation funds (with emphasis on disadvantaged) education, economic development, human services, employment opportunities, housing, ecology, civic affairs, and the arts, primarily in Ohio.
The George S. and Dolores Dore Eccles Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2003 • Private, Family Foundation with assets of \$530MM and giving of \$25MM (as of 2003) • The foundation emphasizes higher education, hospitals and medical research, the performing and visual arts, and social service and youth agencies in its giving, which is primarily in Utah.
Geraldine R. Dodge Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2003 • Private Foundation with assets of \$291MM and giving of \$18MM (as of 2003) • The mission of the foundation is to support and encourage educational, cultural, social, and environmental values, primarily in New Jersey.
The Gill Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2004 • Private, Family Foundation with assets of \$165MM and giving of \$8MM (as of 2003) • The fund gives primarily for gay and lesbian issues, and AIDS education and prevention, across the U.S.

Profiles of Foundations Included in Comparative Set (6)

Foundation	Description
The Goizueta Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2003 • Private, Family Foundation with assets of \$499MM and giving of \$28MM (as of 2003) • The primary focus of the foundation is to assist organizations that empower individuals and families, through educational opportunities, to improve the quality of their lives, primarily in Georgia.
Gordon and Betty Moore Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2004 • Private, Family Foundation with assets of \$4.8B and giving of \$85MM (as of 2003) • The foundation forms and invests in partnerships in order to achieve significant and measurable results in environmental conservation, science, and higher education, on an international basis.
Grable Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2004 • Private, Family Foundation with assets of \$232MM and giving of \$9MM (as of 2003) • The foundation provides funding for organizations that improve educational opportunities, strengthen families, and support community efforts that create an environment in which children can succeed, primarily in Pennsylvania.
Grand Rapids Community Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2004 • Community Foundation with assets of \$159MM and giving of \$6MM (as of 2004) • The foundation provides support through grants for social needs, youth agencies, cultural programs, health, recreation, neighborhood development, the environment, and education, primarily in Michigan.
The Greater Cincinnati Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2003 • Community Foundation with assets of \$341MM and giving of \$29MM (as of 2003) • The foundation funds the arts and culture, community progress, environmental needs, education, health, and social and human services, including youth agencies, primarily in Ohio, Indiana and Kentucky.
Gulf Coast Community Foundation of Venice	<ul style="list-style-type: none"> • Surveyed in Fall 2005 • Community Foundation with assets of \$153MM and giving of \$6MM (as of 2004) • The foundation makes grants in the areas of arts and culture, health and human services, education, civic affairs, and the environment.
Hall Family Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2005 • Private, Family Foundation with assets of \$733MM and giving of \$30MM (as of 2003) • The foundation's purpose is to support the performing and visual arts, education, children, youth and families, and community development, primarily in Missouri.
The Harry and Jeanette Weinberg Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2003 • Private, Family Foundation with assets of \$1.8B and giving of \$101MM (as of 2003) • The foundation contributes to charitable organizations who will benefit those whose financial resources are less than 50% of the members of their relevant community, across the U.S.
Health Foundation of Greater Cincinnati	<ul style="list-style-type: none"> • Surveyed in Spring 2004 • Health Conversion Foundation with assets of \$205MM and giving of \$9MM (as of 2002) • The mission of the foundation is to promote the health of the people of Ohio, Kentucky, and Indiana by funding projects that improve community health, healthcare delivery, and access.
The Heinz Endowments	<ul style="list-style-type: none"> • Surveyed in Spring 2005 • Private, Family Foundation with assets of \$1.3B and giving of \$58MM (as of 2003) • The foundation has five grantmaking programs: Arts & Culture; Children, Youth and Families; Economic Opportunity; Education; and the Environment. The majority of its giving is concentrated within southwestern Pennsylvania, but grants are also made statewide and nationwide.
Horace W. Goldsmith Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2003 • Private Foundation with assets of \$792MM and giving of \$38MM (as of 2003) • The foundation provides support for cultural programs, including the performing arts and museums; Jewish welfare funds and temple support; hospitals and a geriatric center; and education, in the U.S.
Houston Endowment	<ul style="list-style-type: none"> • Surveyed in Spring 2003 • Private, Family Foundation with assets of \$1.4B and giving of \$79MM (as of 2003) • The foundation supports any charitable, educational, or religious undertaking, primarily in Texas.
HRJ Consulting Ltd.	<ul style="list-style-type: none"> • Surveyed in Spring 2005 • HRJ Consulting Ltd. acts as a consultant to a number of related charitable foundations (all funded via an individual now deceased) that operate anonymously in Western Canada and the Mid-West US. • Grant management activity is undertaken on behalf of the foundation by HRJ Consulting and its associated staff.

Profiles of Foundations Included in Comparative Set (7)

Foundation	Description
The Hyams Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2004 • Private, Non-Family Foundation with assets of \$116MM and giving of \$5MM (as of 2003) • The mission of the foundation is to increase economic and social justice and power within low-income communities by supporting civic participation, promoting economic development, etc., primarily in Massachusetts.
J. A. & Kathryn Albertson Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2003 • Private, Family Foundation with assets of \$475MM and giving of \$14MM (as of 2003) • The foundation gives primarily for pre-K-12 education, specifically to improve education in Idaho.
J. Bulow Campbell Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2003 • Private, Family Foundation with assets of \$644MM and giving of \$30MM (as of 2003) • Broad purposes include privately-supported education, human welfare, youth development, the arts, and Christian church-related agencies, primarily in Georgia.
The J. Willard and Alice S. Marriott Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2004 • Private, Family Foundation with assets of \$353MM and giving of \$13MM (as of 2003) • The foundation provides funding for medical research and the treatment of human diseases; education; employment opportunities for disabled and disadvantaged; and the preservation of America's heritage and culture, primarily in Washington, D.C.
James Graham Brown Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2003 • Private, Non-Family Foundation with assets of \$407MM and giving of \$17MM (as of 2003) • The fund gives for higher education, civic organizations, community and economic development, museums, youth, and human service organizations, primarily in Kentucky.
The Jay and Rose Phillips Family Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2004 • Private, Family Foundation with assets of \$191MM and giving of \$10MM (as of 2003) • Primary areas of giving include health, human services, education, programs for people with disabilities, and programs to combat discrimination, primarily in Minnesota.
Jessie Ball duPont Fund	<ul style="list-style-type: none"> • Surveyed in Fall 2003 • Private, Non-Family Foundation with assets of \$279MM and giving of \$11MM (as of 2003) • The fund emphasizes higher and secondary education institutions; cultural and historic preservation programs; social service organizations; hospitals; health agencies; churches; and church-related agencies, primarily in Delaware, Florida and Virginia.
Jessie Smith Noyes Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2005 • Private, Family Foundation with assets of \$61MM and giving of \$3MM (as of 2004) • The foundation focuses its funding on sustainable agriculture, toxics, reproductive rights, and environmental justice in the United States, and also has a funding priority especially for those concerns in New York City.
John D. and Catherine T. MacArthur Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2004 • Private, Non-Family Foundation with assets of \$4.5B and giving of \$195MM (as of 2003) • The foundation fosters the development of knowledge, individual creativity, institutions, public policy, and public-interest media, on an international basis.
John P. McGovern Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2005 • Private, Family Foundation with assets of \$185MM and giving of \$9MM (as of 2004) • The foundation's purpose is to support the activities of established nonprofit organizations, which are of importance to human welfare with special focus on children and family health education and promotion, treatment and disease prevention.
The John R. Oishei Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2005 • Private, Non-Family Foundation with assets of \$245MM and giving of \$12MM (as of 2003) • The foundation places its emphasis in several areas: medical research, health care, education, and the cultural, social, civic and other charitable needs of the Buffalo community.
Kalamazoo Community Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2004 • Community Foundation with assets of \$232MM and giving of \$15MM (as of 2003) • The foundation primarily funds in the areas of economic development, education, and community and youth engagement in greater Kalamazoo, Michigan.
Kansas Health Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2003 and Fall 2005 • Health Conversion Foundation with assets of \$442MM and giving of \$15MM (as of 2003) • The foundation's mission is to improve the health of all residents through strategic grantmaking; funding areas include public health, children's health, and leadership, primarily in Kansas.

Profiles of Foundations Included in Comparative Set (8)

Foundation	Description
Kate B. Reynolds Charitable Trust	<ul style="list-style-type: none"> • Surveyed in Spring 2003 • Private, Non-Family Foundation with assets of \$477MM and giving of \$24MM (as of 2003) • The foundation supports healthcare and projects that benefit poor and needy residents, primarily in North Carolina.
Kronkosky Charitable Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2003 • Private, Non-Family Foundation with assets of \$271MM and giving of \$11MM (as of 2003) • The mission of the foundation is to produce profound good that is tangible and measurable in Texas by funding projects related to health & human services and culture.
Levi Strauss Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2005 • Private, Corporate Foundation with assets of \$77MM and giving of \$10MM (as of 2003) • The foundation's grantmaking programs focus primarily on communities worldwide where Levi Strauss employees and contractors' employees live and work, mainly on the issues of preventing the spread of HIV/AIDS and increasing economic development and education opportunities.
Longwood Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2003 • Private, Family Foundation with assets of \$645MM and giving of \$28MM (as of 2003) • The primary obligation of the fund is the support of Longwood Gardens; limited grants are given to educational institutions, hospitals, social service and youth agencies, and culture, primarily in Delaware.
The Louis Calder Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2005 • Private, Family Foundation with assets of \$146MM and giving of \$6MM (as of 2004) • The Foundation seeks to promote the educational and scholastic development of children and youth in the Greater New York City Metropolitan Area, primarily through capital and operating support grants.
Lucile Packard Foundation for Children's Health	<ul style="list-style-type: none"> • Surveyed in Fall 2005 • Public Charity with assets of \$235MM and giving of \$42MM (as of 2004) • The foundation is devoted exclusively to promoting, protecting, and sustaining the health of children, with a focus on San Mateo and Santa Clara counties in Northern California.
Lumina Foundation for Education	<ul style="list-style-type: none"> • Surveyed in Spring 2003 and Spring 2005 • Private, Non-Family Foundation with assets of \$1.1B and giving of \$28MM (as of 2003) • The fund primarily gives to support access to postsecondary education (access, retention and attainment, and non-traditional learners), across the U.S.
Maine Health Access Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2004 • Health Conversion Foundation with assets of \$102MM (as of 2003) • The foundation's mission is to promote affordable and timely access to quality health care and to improve the health of every Maine resident.
Mathile Family Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2003 • Private, Family Foundation with assets of \$274MM and giving of \$21MM (as of 2003) • The foundation's focus is placed on three main areas: children, education, and the meeting of basic human needs, primarily in Ohio.
The McKnight Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2003 • Private, Family Foundation with assets of \$1.9B and giving of \$75MM (as of 2003) • The fund emphasizes its grantmaking in the areas of human and social services, arts, environment, and housing, primarily in Minnesota; in addition, it supports nationwide scientific research programs.
Meyer Memorial Trust	<ul style="list-style-type: none"> • Surveyed in Spring 2003 • Private, Non-Family Foundation with assets of \$402MM and giving of \$17MM (as of 2003) • The fund provides general purpose grants for education, the arts and humanities, health, and social welfare in Oregon and Washington. In addition, the fund's Support for Teacher Initiatives Program provides awards to teachers.
Michael Reese Health Trust	<ul style="list-style-type: none"> • Surveyed in Spring 2005 • Health Conversion Foundation with assets of \$103MM and giving of \$3MM (as of 2004) • The trust seeks to improve the health of people in Chicago's metropolitan communities through effective grantmaking in health care, health education, and health research.
The Minneapolis Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2003 and Spring 2005 • Community Foundation with assets of \$450MM and giving of \$42MM (as of 2004) • The purpose of the foundation is to join with others to strengthen the community, in measurable and sustainable ways, for the benefit of all citizens, especially those who are disadvantaged, primarily in Minnesota.

Profiles of Foundations Included in Comparative Set (9)

Foundation	Description
Missouri Foundation for Health	<ul style="list-style-type: none"> • Surveyed in Fall 2003 and Fall 2005 • Health Conversion Foundation with assets of \$841MM and giving of \$6MM (as of 2002) • The mission of the foundation is to empower Missouri communities in order to achieve equal access to quality health services that promote prevention and encourage healthy behaviors.
The Morris and Gwendolyn Cafritz Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2004 • Private, Family Foundation with assets of \$353MM and giving of \$16MM (as of 2003) • The foundation is committed to building a stronger community for residents of the Washington, DC area through support of programs in arts and humanities, community services, education, and healthcare.
The Mt. Sinai Health Care Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2004 • Health Conversion Foundation with assets of \$123MM and giving of \$6MM (as of 2003) • The fund supports the purposes of The Jewish Community Federation of Cleveland and activities designed to improve the health status of Ohio residents, as well as support of their needs.
The Nash Family Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2005 • Private, Family Foundation with assets of \$104MM and giving of \$6MM (as of 2004) • The foundation's purpose is to support arts and culture, health, and Jewish organizations.
The Nathan Cummings Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2003 • Private, Family Foundation with assets of \$415MM and giving of \$19MM (as of 2003) • This foundation is rooted in the Jewish tradition and committed to democratic values & social justice, a socially & economically just society, humane health care, and arts & culture, on an international basis.
The New Hampshire Charitable Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2004 • Community Foundation with assets of \$263MM and giving of \$17MM (as of 2003) • The foundation gives for charitable and educational purposes in the arts, humanities, environment, and conservation, primarily in New Hampshire.
The New York Community Trust	<ul style="list-style-type: none"> • Surveyed in Spring 2005 • Community Foundation with assets of \$1.8B and giving of \$116MM (as of 2003) • The foundation's purpose is to help New Yorkers fulfill their charitable goals and make grants that respond to the needs of New York City.
Nina Mason Pulliam Charitable Trust	<ul style="list-style-type: none"> • Surveyed in Fall 2003 • Private, Family Foundation with assets of \$341MM and giving of \$13MM (as of 2003) • The trust seeks to help people in need, especially women, children and families; to protect animals and nature; and to enrich community life in Indianapolis, Indiana and Phoenix, Arizona.
Omidyar Network	<ul style="list-style-type: none"> • Surveyed in Spring 2004 (Was known as "Omidyar Foundation" at the time) • Private, Family Foundation with assets of \$113MM and giving of \$8MM (as of 2003) • The foundation's mission is to provide leadership that will inform, inspire and engage individuals; be a catalyst for connectivity; and create environments to cultivate community effectiveness, primarily in California and Massachusetts.
Partnership for Excellence in Jewish Education (PEJE)	<ul style="list-style-type: none"> • Surveyed in Fall 2005 • Private, Non-Family grantmaker with assets of \$7MM and giving of \$2MM (as of 2003) • The grantmaker focuses on strengthening the Jewish day school movement in North America.
Paul G. Allen Foundations	<ul style="list-style-type: none"> • Surveyed in Spring 2004 • Private, Family Foundation with assets of \$12MM and giving of \$20MM (as of 2002) • The foundation focuses on vulnerable populations, families and the arts in the Northwest, music programs, the environment, education, and health care, across the U.S.
Peninsula Community Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2004 • Community Foundation with assets of \$475MM and giving of \$49MM (as of 2003) • The fund's mission is to support cultural, educational, social service, and health programs, primarily in California.
The Pew Charitable Trusts	<ul style="list-style-type: none"> • Surveyed in Spring 2003 • Private, Family Foundation with assets of \$38MM and giving of \$59MM (as of 2004) • The foundation supports nonprofit activities in the areas of culture, education, the environment, health and human services, public policy, and religion, across the U.S.

Profiles of Foundations Included in Comparative Set (10)

Foundation	Description
The Philadelphia Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2005 • Community Foundation with assets of \$237MM and giving of \$15MM (as of 2003) • The foundation's purpose is to serve as a vehicle and resource for philanthropy in Bucks, Chester, Delaware, Montgomery and Philadelphia Counties in Pennsylvania.
Polk Brothers Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2003 • Private, Family Foundation with assets of \$329MM and giving of \$15MM (as of 2003) • The foundation emphasizes programs that work with populations of need - particularly children; grants are made in four program areas: social services, education, culture and health, primarily in Illinois.
Pritzker Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2003 • Private, Family Foundation with assets of \$314MM and giving of \$20MM (as of 2003) • Grants are awarded largely for higher education, including medical education; religious welfare funds; hospitals; temple support; and cultural programs, across the U.S.
Public Welfare Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2003 • Private Foundation with assets of \$413MM and giving of \$18MM (as of 2003) • The foundation supports organizations that address human needs in disadvantaged communities through advocacy, strategy, services, and public policy, across the U.S.
Quantum Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2004 • Health Conversion Foundation with assets of \$128MM and giving of \$7MM (as of 2002) • The foundation seeks to advance the health, education, and community for every resident of Palm Beach County, Florida.
The Ralph M. Parsons Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2005 • Private, Non-Family Foundation with assets of \$337MM and giving of \$14MM (as of 2003) • The foundation's purpose is to support and facilitate the work of the best non-profit organizations located throughout Southern California.
Rasmuson Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2004 • Private, Family Foundation with assets of \$428MM and giving of \$17MM (as of 2003) • Primary areas of funding include health/human services, arts/cultural programs, organizational capacity building, community development, and education, primarily in Alaska.
The Rhode Island Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2003 • Community Foundation with assets of \$351MM and giving of \$16MM (as of 2003) • The foundation provides funding in education, health care, arts and culture, youth, the aged, social services, urban affairs, historic preservation, and the environment, primarily in Rhode Island.
Richard & Rhoda Goldman Fund	<ul style="list-style-type: none"> • Surveyed in Spring 2003 • Private, Family Foundation with assets of \$371MM and giving of \$26MM (as of 2003) • The fund gives to programs that will have a significant positive impact on the environment, population, Jewish affairs, children and youth, social and human services, and the elderly, on an international basis.
Richard King Mellon Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2003 • Private, Family Foundation with assets of \$1.6B and giving of \$69MM (as of 2003) • Local grants emphasize conservation, education, families and youth, economic development, and system reform in Pennsylvania; in addition, the foundation supports the conservation of natural areas and wildlife in the U.S.
Richard M. Fairbanks Foundation, Inc.	<ul style="list-style-type: none"> • Surveyed in Spring 2005 • Private, Family Foundation with assets of \$300MM and giving of \$10MM (as of 2004) • The foundation's purpose is to support organizations in the areas of health, self-sufficiency, market-based solutions to social problems, and those that improve the vitality of Indianapolis.
Robert R. McCormick Tribune Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2004 • Private, Non-Family Foundation with assets of \$2.0B and giving of \$71MM (as of 2003) • The foundation is dedicated to improving the social and economic environment, encourage free and responsible discussion, enhance the effectiveness of education, and stimulate responsible citizenship, across the U.S.
The Robert Wood Johnson Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2004 and Spring 2005 • Private, Family Foundation with assets of \$7.9B and giving of \$391MM (as of 2003) • The foundation provides funding to health and health care, particularly concentrating on access, quality of care for people with chronic health conditions, healthy communities and lifestyles, and substance abuse, across the U.S.

Profiles of Foundations Included in Comparative Set (11)

Foundation	Description
Rockefeller Brothers Fund	<ul style="list-style-type: none"> • Surveyed in Fall 2004 • Private, Family Foundation with assets of \$710MM and giving of \$20MM (as of 2003) • The fund supports efforts to expand knowledge, clarify values and critical choices, nurture creative expression, shape public policy, and enhance cultural diversity and ecological integrity, on an international basis.
The Rockefeller Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2005 • Private, Non-Family Foundation with assets of \$3.0B and giving of \$141MM (as of 2003) • The foundation makes grants worldwide to help fight poverty, hunger, and disease; improve employment opportunities; increase the availability and quality of housing and schools, and stimulate creativity and cultural expression.
Rose Community Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2004 • Health Conversion Foundation with assets of \$202MM and giving of \$6MM (as of 2003) • The foundation aims to enhance quality of life in the community by supporting programs in the areas of child and family development, education, aging, health, and Jewish life, primarily in Colorado.
The Russell Family Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2005 • Private, Family Foundation with assets of \$139MM and giving of \$12MM (as of 2004) • The foundation's purpose is to support organizations working in the fields of environmental sustainability, primarily in Washington.
Ruth Mott Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2005 • Private, Family Foundation with assets of \$212MM and giving of \$6MM (as of 2004) • The foundation funds community arts, community health promotion, and community beautification, primarily in Michigan.
S & G Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2004 • Private, Family Foundation with assets of \$226MM and giving of \$6MM (as of 2004) • The foundation gives primarily for arts and educational institutions and organizations, across the U.S.
S. H. Cowell Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2004 • Private, Non-Family Foundation with assets of \$159MM and giving of \$4MM (as of 2003) • The mission of the foundation is to improve the quality of life of children and families living in poverty in northern California.
The Saint Paul Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2005 • Community Foundation with assets of \$595MM and giving of \$28MM (as of 2004) • The foundation's purpose is to support the people of the greater Saint Paul area of Minnesota by building permanent charitable capital, making philanthropic grants, and providing services that contribute to the health and vitality of the community.
Santa Barbara Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2004 • Community Foundation with assets of \$149MM and giving of \$6MM (as of 2003) • The foundation supports the arts, children/youth services, community development, education, environment, health care, and human services for Santa Barbara County, California.
SC Ministry Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2003 • Private, Non-Family Foundation with assets of \$185MM and giving of \$7MM (as of 2004) • The mission of this foundation is to promote the mission and ministry of the Sisters of Charity of Cincinnati and the organizations they fund, primarily in Ohio.
Shelton Family Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2005 • Private, Family Foundation with assets of \$137MM and giving of \$5MM (as of 2004) • The foundation's purpose is to support education, health, children and youth, and Christian organizations.
The Sherman Fairchild Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2003 • Private Foundation with assets of \$424MM and giving of \$13MM (as of 2003) • The foundation places an emphasis on higher education, fine arts and cultural institutions, medical research, and social welfare, across the U.S.
The Shubert Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2003 • Private Foundation with assets of \$251MM and giving of \$14MM (as of 2004) • The foundation is dedicated to sustaining and advancing the live performing arts in the United States, with a particular emphasis on theatre and a secondary focus on dance.

Profiles of Foundations Included in Comparative Set (12)

Foundation	Description
The Skillman Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2003 • Private Foundation with assets of \$486MM and giving of \$18MM (as of 2003) • The foundation is a resource for improving the lives of children in metropolitan Detroit, MI. Children in disadvantaged situations are of special concern.
Skoll Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2005 • Private, Family Foundation with assets of \$354MM and giving of \$14MM (as of 2004) • The foundation advances systemic change to benefit communities around the world by investing in, connecting and celebrating social entrepreneurs, primarily in California.
Stuart Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2003 • Private, Family Foundation with assets of \$313MM and giving of \$15MM (as of 2003) • The foundation's mission is to help children and youth become responsible citizens by strengthening public schools, the child welfare system, and communities in order to support families, primarily in California and Washington.
Surdna Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2004 • Private, Family Foundation with assets of \$605MM and giving of \$29MM (as of 2003) • The foundation focuses nationally on the areas of arts, community revitalization, effective citizenry, environment, and nonprofit sector support.
The Vermont Community Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2005 • Community Foundation with assets of \$71MM and giving of \$4MM (as of 2003) • The foundation's purpose is to manage charitable funds, and to make grants to Vermont's nonprofit organizations to address community problems and enhance the quality of life in the state.
Victoria Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2004 • Private, Family Foundation with assets of \$200MM and giving of \$9MM (as of 2003) • The foundation focuses its grantmaking primarily on urban activities and education programs in Newark, New Jersey.
Virginia G. Piper Charitable Trust	<ul style="list-style-type: none"> • Surveyed in Fall 2004 • Private, Family Foundation with assets of \$529MM and giving of \$26MM (as of 2004) • The foundation supports four initiatives: early childhood, youth, the elderly, and arts and culture, primarily in Arizona.
W. K. Kellogg Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2004 • Private, Non-Family Foundation with assets of \$5.7B and giving of \$176MM (as of 2003) • The foundation funds programs in development, health, youth and education, and philanthropy and volunteerism, on an international basis.
Waitt Family Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2004 • Private, Family Foundation with assets of \$157MM and giving of \$7MM (as of 2003) • The foundation's goal is to empower communities, leverage partnerships with other organizations/projects, and to communicate new ideas to communities and families, across the U.S.
The Wallace Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2004 • Private, Non-Family Foundation with assets of \$1.3B and giving of \$49MM (as of 2003) • The mission of the foundation is to develop effective educational leaders in order to improve student learning; provide informal learning opportunities for children and families; and increase participation in the arts, across the U.S.
Wayne & Gladys Valley Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2003 • Private, Family Foundation with assets of \$591MM and giving of \$23MM (as of 2003) • Primary areas of funding include higher, secondary, and other education; medicine; hospitals; youth; and local Catholic schools and charities, primarily in California.
Weingart Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2003 • Private, Non-Family Foundation with assets of \$749MM and giving of \$35MM (as of 2004) • The foundation provides support for community and social services, education, and health care, with strong emphasis on programs for children and youth, primarily in California.
Wilburforce Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2004 • Private, Non-Family Foundation with assets of \$2MM and giving of \$9MM (as of 2003) • The foundation funds environmental issues in Western United States and Western Canada.

Profiles of Foundations Included in Comparative Set (13)

Foundation	Description
The William and Flora Hewlett Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2003 • Private, Non-Family Foundation with assets of \$6.0B and giving of \$258MM (as of 2003) • Funding is given for conflict resolution, the environment, performing arts, education, population studies, family and community development, and U.S.-Latin American relations, on an international basis.
The William K. Warren Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2003 • Private, Family Foundation with assets of \$436MM and giving of \$14MM (as of 2003) • The foundation awards grants for local Catholic health care facilities, education, and social services in Oklahoma; substantial support for a medical research program in OK as well.
The William Penn Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2003 • Private, Family Foundation with assets of \$1.1B and giving of \$56MM (as of 2003) • The foundation provides the funding of efforts that foster rich cultural expression, strengthen children's futures, and deepen connections to nature and community, primarily in Pennsylvania.
The William Randolph Hearst Foundations	<ul style="list-style-type: none"> • Surveyed in Fall 2003 • Private, Family Foundation with assets of \$588MM and giving of \$22MM (as of 2003) • The mission of the foundation is to provide opportunities to underserved and underrepresented populations in the fields of education, health, social services, and culture, across the U.S.
The William Stamps Farish Fund	<ul style="list-style-type: none"> • Surveyed in Spring 2004 • Private, Family Foundation with assets of \$158MM and giving of \$8MM (as of 2003) • The fund gives primarily for education and medical research in Houston, TX.
Winter Park Health Foundation	<ul style="list-style-type: none"> • Surveyed in Fall 2005 • Health Conversion Foundation with assets of \$119MM and giving of \$2MM (as of 2003) • The foundation's primary focus areas are children and youth, older adults and access to health care, as well as ongoing support of Winter Park Memorial Hospital.
Woods Fund of Chicago	<ul style="list-style-type: none"> • Surveyed in Fall 2004 • Private Foundation with assets of \$67MM and giving of \$3MM (as of 2003) • Funding is concentrated into two main program areas: Community Organizing, and Public Policy in Illinois. In addition, a limited number of grants are awarded for Arts and Culture, primarily in Illinois.
Z. Smith Reynolds Foundation	<ul style="list-style-type: none"> • Surveyed in Spring 2003 • Private, Family Foundation with assets of \$17MM and giving of \$18MM (as of 2003) • The foundation provides funding for community building and economic development, environment, governance, public policy and civic engagement, pre-collegiate education, and social justice and equity, primarily in North Carolina.

Grantee Perception Report Subscribers (1)

To date, 96 foundations have commissioned the GPR from CEP. These foundations are:

Ann Arbor Area Community Foundation	The Duke Endowment
The Assisi Foundation of Memphis	Dyson Foundation
The AVI CHAI Foundation	Endowment for Health
Barr Foundation	Evelyn and Walter Haas, Jr. Fund
Bill & Melinda Gates Foundation	The F.B. Heron Foundation
Blandin Foundation	Fannie Mae Foundation
Blue Cross Blue Shield of Massachusetts Foundation	The Ford Family Foundation
The Boston Foundation	The GAR Foundation
The Broad Foundation	The George Gund Foundation
The Brown Foundation	The Goizueta Foundation
Bush Foundation	Gordon and Betty Moore Foundation
Carnegie Corporation of New York	The Grable Foundation
The Case Foundation	Grand Rapids Community Foundation
Charles and Helen Schwab Foundation	The Greater Cincinnati Foundation
Charles and Lynn Schusterman Family Foundation	Gulf Coast Community Foundation of Venice
Charles Stewart Mott Foundation	The Health Foundation of Greater Cincinnati
Claude Worthington Benedum Foundation	The Heinz Endowments
The Cleveland Foundation	Houston Endowment
The Clowes Fund	The Hyams Foundation
The Columbus Foundation	Jessie Ball duPont Fund
Community Foundation Silicon Valley	Jessie Smith Noyes Foundation
Connecticut Health Foundation	John D. and Catherine T. MacArthur Foundation
The David and Lucile Packard Foundation	The John R. Oishei Foundation
Doris Duke Charitable Foundation	Kalamazoo Community Foundation

Grantee Perception Report Subscribers (2)

Kansas Health Foundation
Kronkosky Charitable Foundation
Levi Strauss Foundation
Lucile Packard Foundation for Children's Health
Lumina Foundation for Education
Maine Health Access Foundation
The McKnight Foundation
Michael Reese Health Trust
The Minneapolis Foundation
Missouri Foundation for Health
The Mt. Sinai Health Care Foundation
The Nathan Cummings Foundation
The New Hampshire Charitable Foundation
The New York Community Trust
The Nina Mason Pulliam Charitable Trust
Omidyar Foundation
Paul G. Allen Foundations
Peninsula Community Foundation
The Philadelphia Foundation
Rasmuson Foundation
The Rhode Island Foundation
Richard & Rhoda Goldman Fund
Richard M. Fairbanks Foundation
The Robert Wood Johnson Foundation

Rockefeller Brothers Fund
The Rockefeller Foundation
Rose Community Foundation
The Russell Family Foundation
Ruth Mott Foundation
S. H. Cowell Foundation
The Saint Paul Foundation
Santa Barbara Foundation
SC Ministry Foundation
Skoll Foundation
Stuart Foundation
Surdna Foundation
Vermont Community Foundation
Virginia G. Piper Charitable Trust
W.K. Kellogg Foundation
The Wallace Foundation
Wayne & Gladys Valley Foundation
Wilburforce Foundation
The William and Flora Hewlett Foundation
The William Penn Foundation
Winter Park Health Foundation
Woods Fund of Chicago

About the Center for Effective Philanthropy (CEP)

CEP is a nonprofit, nonpartisan organization that received initial funding in the summer of 2001.

Mission

To improve the practice of philanthropy by providing management and governance tools to define, assess, and improve overall foundation performance.

Vision

A world in which pressing social needs are more effectively addressed. We believe improved performance of funders, and in particular foundations, can have a profoundly positive impact on non-profit organizations and the people and communities they serve.

More information about CEP can be found on our Web site:
www.effectivephilanthropy.org

CEP Funders

CEP is funded through a combination of foundation grants and revenue earned from management tools and seminars. Funders providing support for CEP's work include:

Bill & Melinda Gates
Foundation

Charles Stewart Mott Foundation

The David and Lucile Packard
Foundation

KAUFFMAN
Foundation

LUMINA
FOUNDATION FOR EDUCATION

MACARTHUR

marguerite casey foundation

Nellie Mae
Education
Foundation
Opening Doors to Tomorrow

Rockefeller
Brothers Fund
Philanthropy for an Interdependent World

skoll
FOUNDATION

SURDNA
FOUNDATION

THE WILLIAM
AND FLORA HEWLETT
FOUNDATION

CEP Research

CEP's research and creation of comparative data sets leads to the development of assessment tools, publications serving the foundation field, and programming. CEP's research initiatives focus on several subjects, including:

- **Overall Performance Assessment**
- **Foundation Program Strategy**
- **Foundation Governance**
- **Foundation-Grantee Relationships**
- **Operational Benchmarking**

CEP Assessment Tools

CEP provides foundation leaders with assessment tools – utilizing comparative data – that inform overall performance assessment:

- **Grantee Perception Report® (GPR):** an assessment tool that provides foundation CEOs, boards, and staff with comparative data on grantee perceptions of foundation performance on a variety of dimensions
- **Applicant Perception Report (APR):** a companion to the GPR that provides comparative data from surveys of declined grant applicants
- **Comparative Board Report (CBR):** a self-assessment tool for foundations that provides data on board structure and trustee perceptions of board effectiveness
- **Staff Perception Report (SPR):** explores foundation staff members' perceptions of foundation effectiveness and job satisfaction on a comparative basis
- **Operational Benchmarking Report (OBR):** provides comparative data, relative to a selected peer group of foundations, on aspects of foundation operations – including foundation staffing, program officer workload, grant processing times, and administrative costs

Contact Information

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