

*CONFIDENTIAL*

# Applicant Perception Report™

prepared for the

**Beldon Fund**

Spring 2008

*VERSION 05/30/08*



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* (2004) and *Foundation Communications: The Grantee Perspective* (2006) – and to provide individual foundations with Grantee Perception Reports.
  
- ◆ **CEP developed the Applicant Perception Report (APR) as a companion to the Grantee Perception Report.® Based on a separate, shorter survey, the APR allows foundations to understand the candid perspectives of declined applicants on a number of important dimensions. The APR shows an individual foundation the perceptions of its applicants relative to a set of perceptions of 25 other foundations whose declined applicants were surveyed by CEP.**
  - Applicant perceptions must be interpreted in light of the unique strategy of the foundation.
    - The survey covers many areas in which applicants' perceptions might be useful to a foundation. Each foundation should place emphasis on the areas covered according to the foundation's specific priorities.

# Methodology

- ◆ The Center for Effective Philanthropy (CEP) has surveyed over 5,000 declined applicants of 25 foundations since spring 2004. Please see the Appendix for a list of all foundations whose declined applicants CEP has surveyed.
  
- ◆ This Applicant Perception Report (APR) contains data collected over the last five years, and includes almost 2,400 declined applicant responses.
  - CEP surveyed 140 fiscal year 2007 declined applicants of the Beldon Fund (“Beldon”) during February and March 2008. CEP received 46 completed responses, a 33 percent response rate.<sup>1</sup>
  - The average and/or median rating for these respondents is shown throughout this report.
  - Declined applicants submitted responses via mail and the Web.
  
- ◆ Contact information for declined applicants was provided by Beldon.
  
- ◆ Throughout this report, selected declined applicant comments are shown. This group of comments was selected to be representative of the 85 comments CEP received about Beldon.

# Key Findings

Beldon declined applicants have a mixed view of the Fund, rating it as positively as declined applicants of the typical foundation on some dimensions and on others rating less positively than typical.

Declined applicants' ratings of Beldon's clarity of communication of goals and strategy and the consistency of its communications resources – both personal and written – are similar to those of the median foundation. When learning about Beldon, declined applicants utilized individual communication with Fund staff less frequently than typical. One third indicated that the Fund was not at all clear in its intent to spend down.

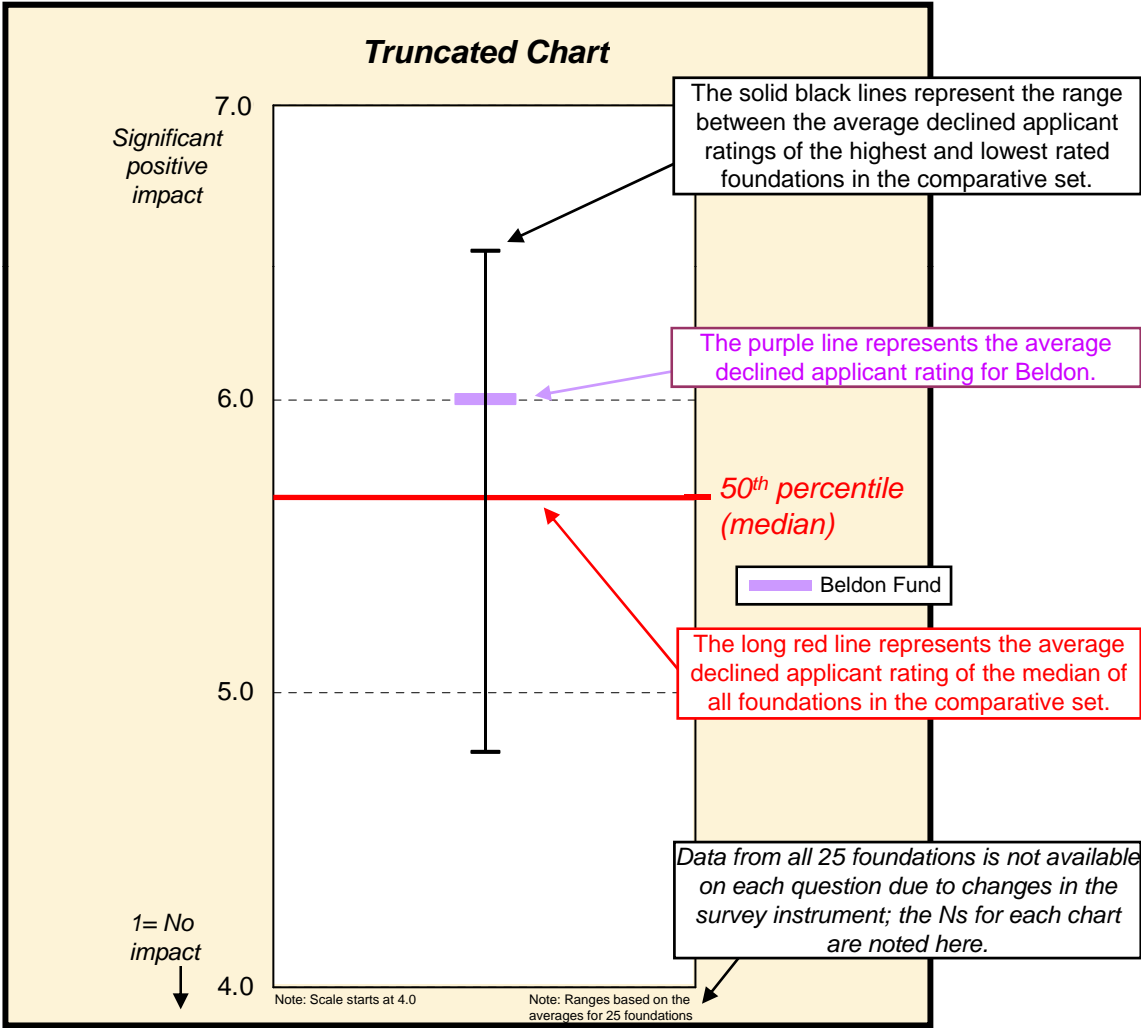
Beldon declined applicants rate the equality of access to the Fund similarly to the rating received by the median foundation in the comparative set. They also rate the Fund's impact on their fields as positively as typical.

Declined applicants rate the Fund's fairness of treatment similarly to the median foundation and the responsiveness of Beldon staff less positively than typical. Only 15 percent of declined applicants, a smaller than typical proportion, reported receiving assistance in the development of their grant proposal. Twenty percent received feedback or advice from the Fund after their proposal was declined and they rated feedback they received less positively than typical for its helpfulness in strengthening future proposals to other funders. Except for an LOA, Beldon declined applicants less frequently report submitting all types of data to the Fund and report spending a smaller than typical number of hours on the proposal and selection process.

When declined applicants were asked to provide the reason given by Beldon for why their grant request was denied, over half reported that there was no reason given or that the Fund was “only able to fund a few of the many worthy [projects] that come [its] way.” The most frequent grantee suggestion was for the Fund to provide more feedback into why applicants were declined funding.

# Reading APR Charts

Much of the declined applicant perception data in the APR is presented in the format below. These graphs show the average of declined applicants responses for Beldon, against the average ratings of the full comparative set of 25 foundations. **Throughout the report, charts in this format are truncated from the full scale because foundation averages fall within the top half of the range.**



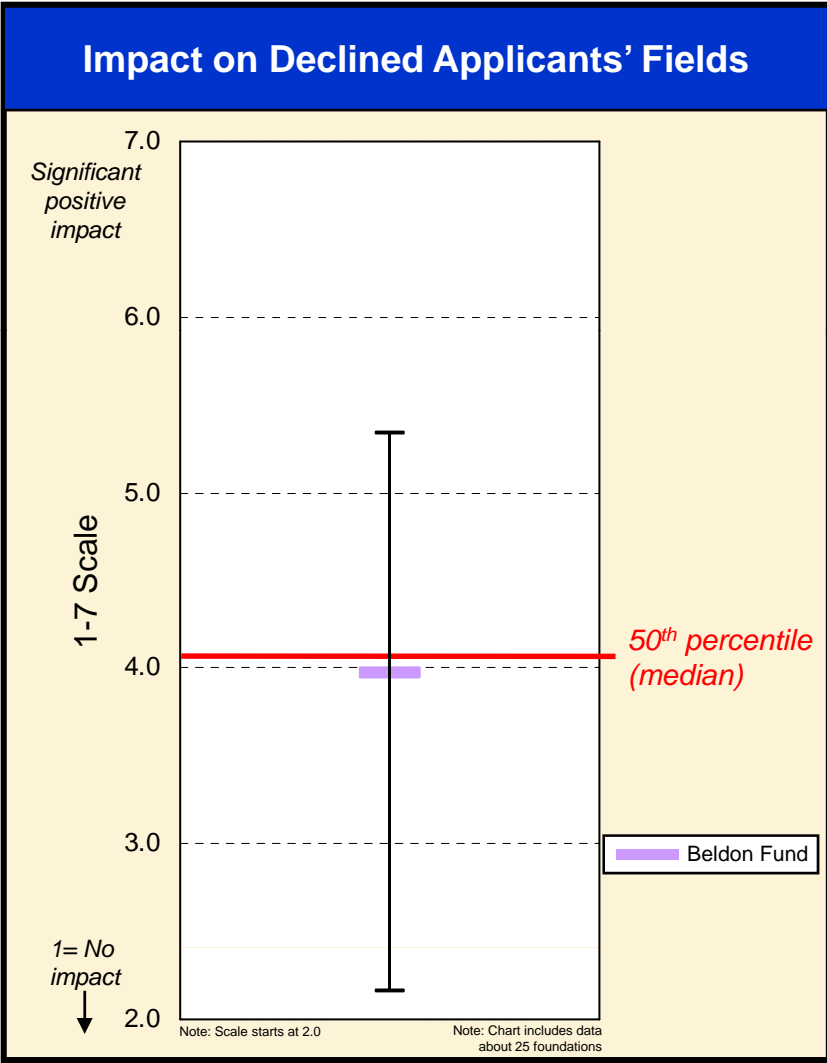
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# Impact on Declined Applicants' Fields

On impact on declined applicants' fields, Beldon is rated:

- similarly to the median foundation



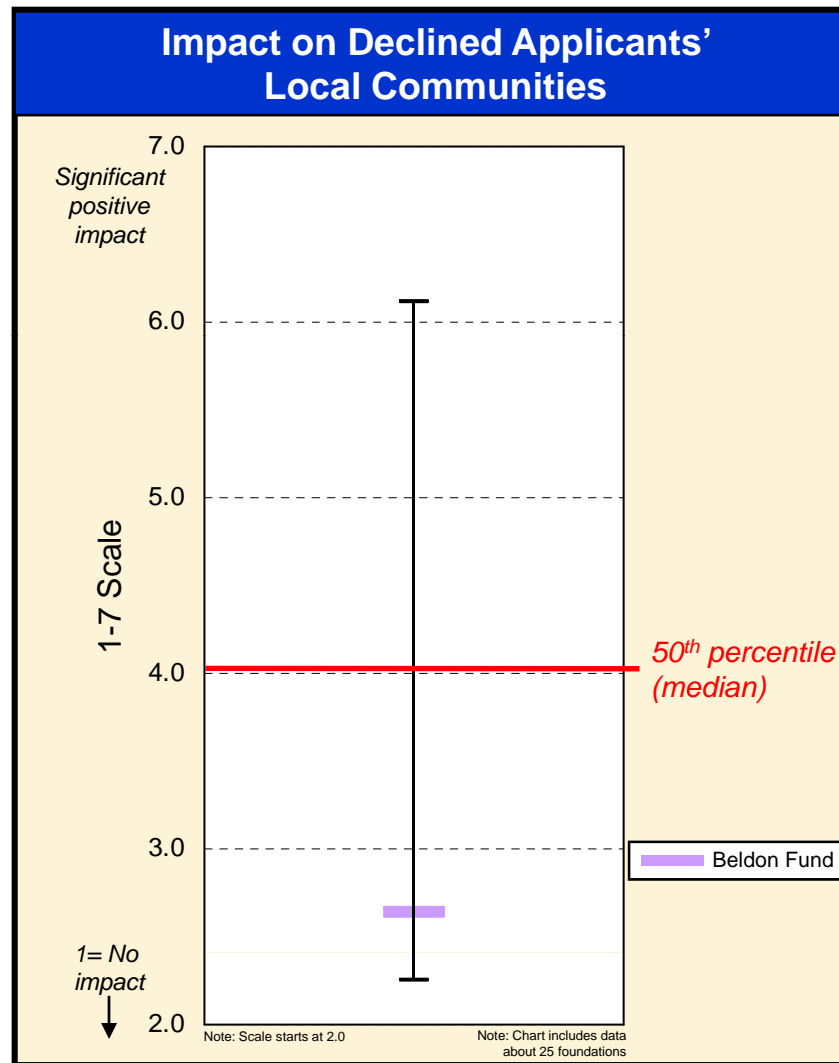
Note: This question includes a “don’t know” response option; 31 percent of Beldon respondents answered “don’t know,” compared to 19 percent at the median foundation.



# Impact on Declined Applicants' Local Communities

On impact on declined applicants' local communities, Beldon is rated:

- below the median foundation



Note: This question includes a "don't know" response option; 33 percent of Beldon respondents answered "don't know," compared to 22 percent at the median foundation.

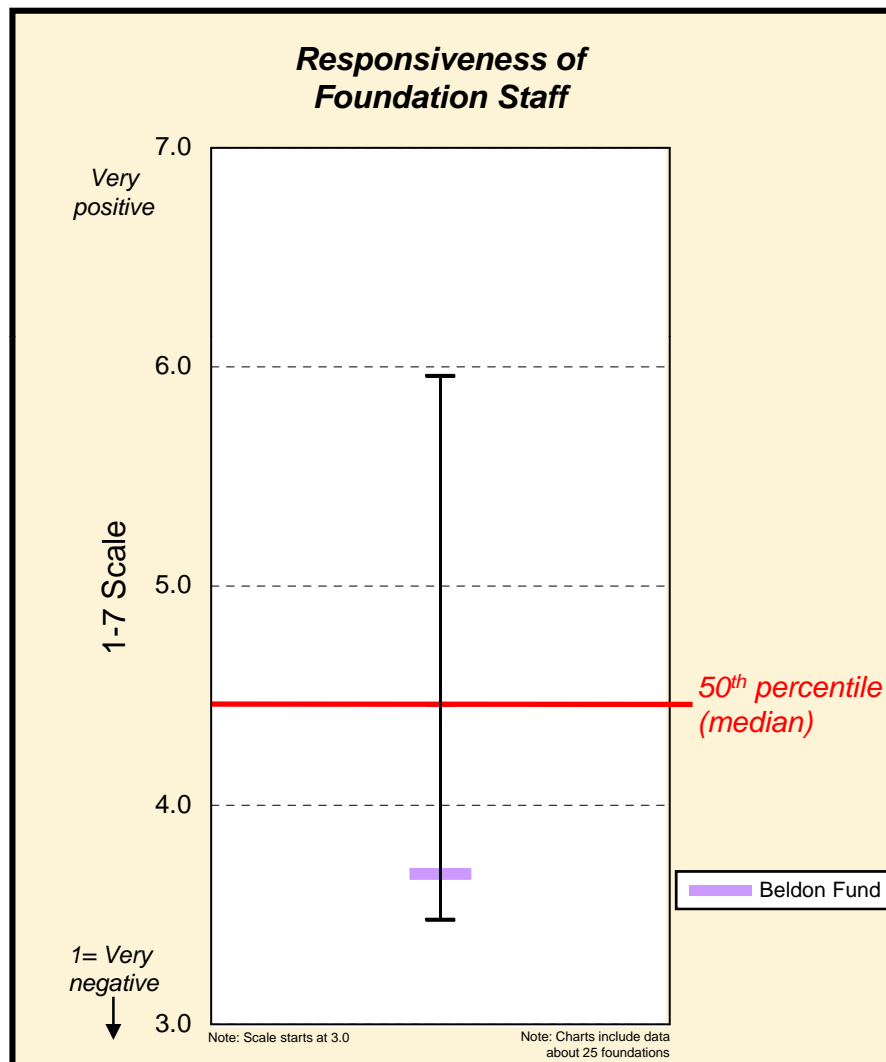
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# Responsiveness of Foundation Staff

On responsiveness of Fund staff to declined applicants, Beldon is rated:

- below the median foundation



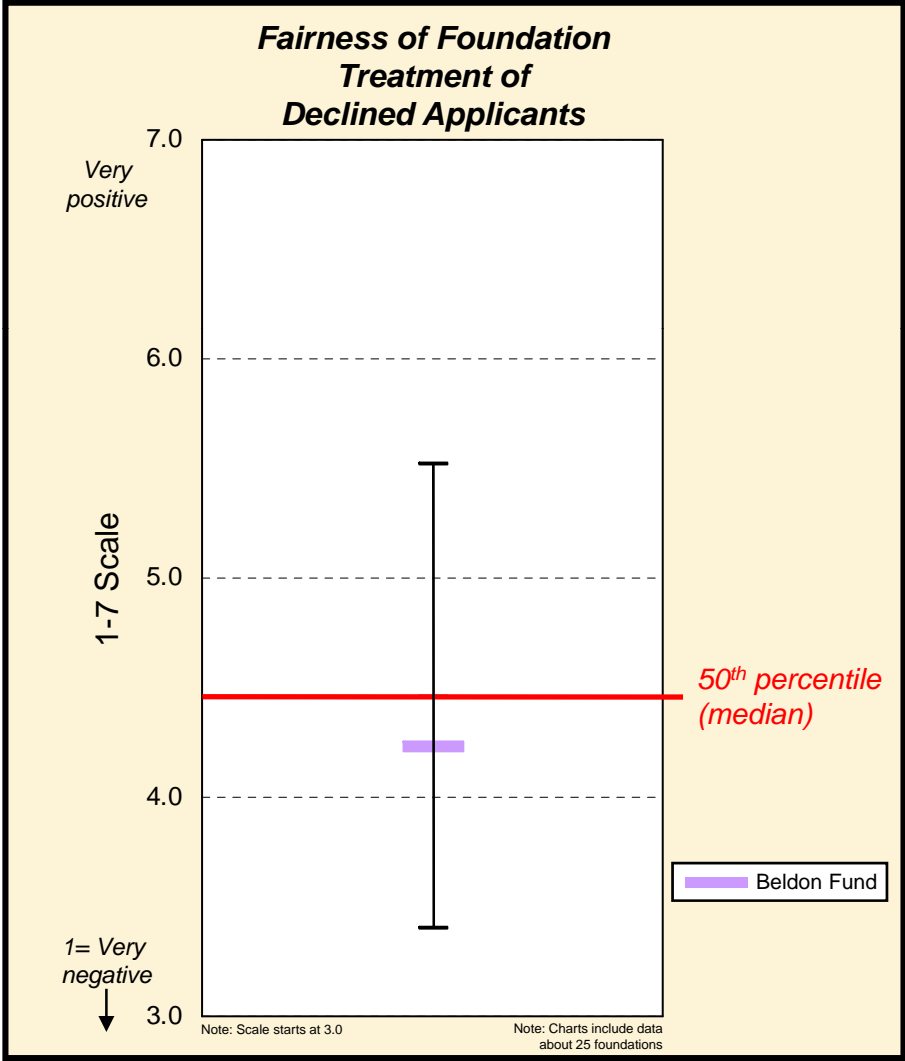
## Selected Declined Applicant Comments

- ♦ *“It was hard to get in touch with foundation staff.”*
- ♦ *“It seemed professional and helpful when we were contacting them.”*
- ♦ *“Call never returned. Reached out to [staff] on many occasions to speak and never received returned calls or follow-up. Our organization is a perfect match for Beldon Fund priorities and we recently reapplied and again can get no response. Very tiresome to write, send proposals and get no response other than a form letter apologizing.”*
- ♦ *“The processes and interactions were very straightforward and easy to follow. However, as a new organization trying to build capacity from an all volunteer staff, we simply do not have the resources for much one-on-one communication with foundation staff.”*

# Fairness of Treatment

On fairness of treatment of declined applicants, Beldon is rated:

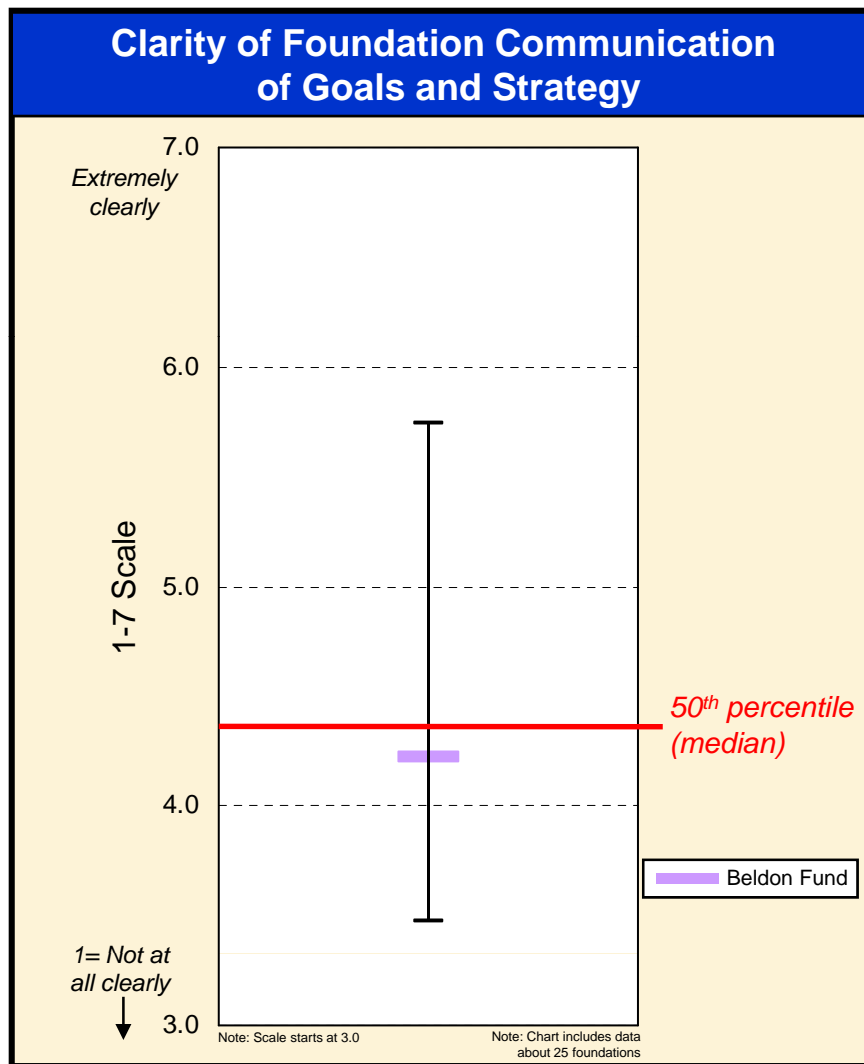
- similarly to the median foundation



# Communication of Goals and Strategy

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

- similarly to the median foundation



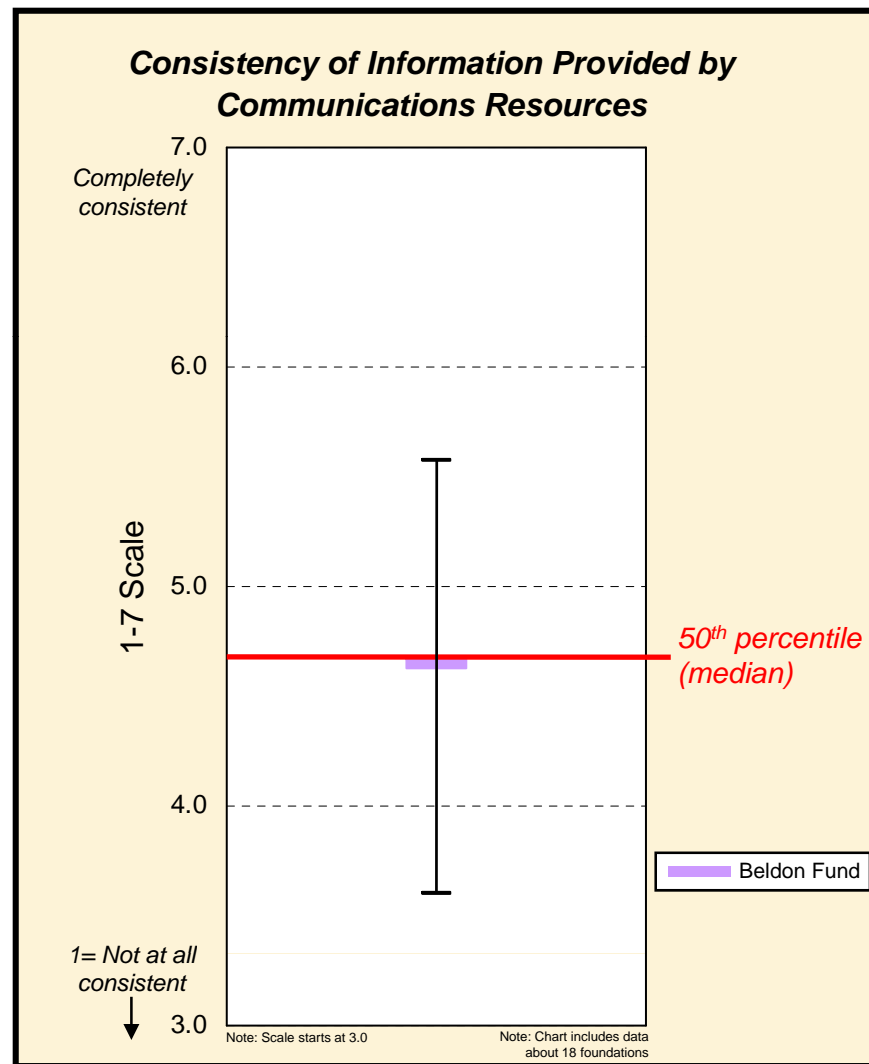
## Selected Declined Applicant Comments

- ♦ *"I found the website to be extremely helpful. All the information I felt I needed was contained on the site."*
- ♦ *"[We were] told to apply but also told that [the] foundation is spending down. What's the point in encouraging applications then?"*
- ♦ *"We knew that the foundation was spending down, but we did not know by when. [They were] clear by the end of 2006 that big changes were happening and there was lack of clarity on what the foundation's priorities were going to be in 2007. [Staff] did provide helpful advice along the way and ... have been as helpful as they could be."*
- ♦ *"The policies and guidelines for spending down were not clear (such as the time it would take to do this [and] what their priorities were for spending down)."*

# Consistency of Communications

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

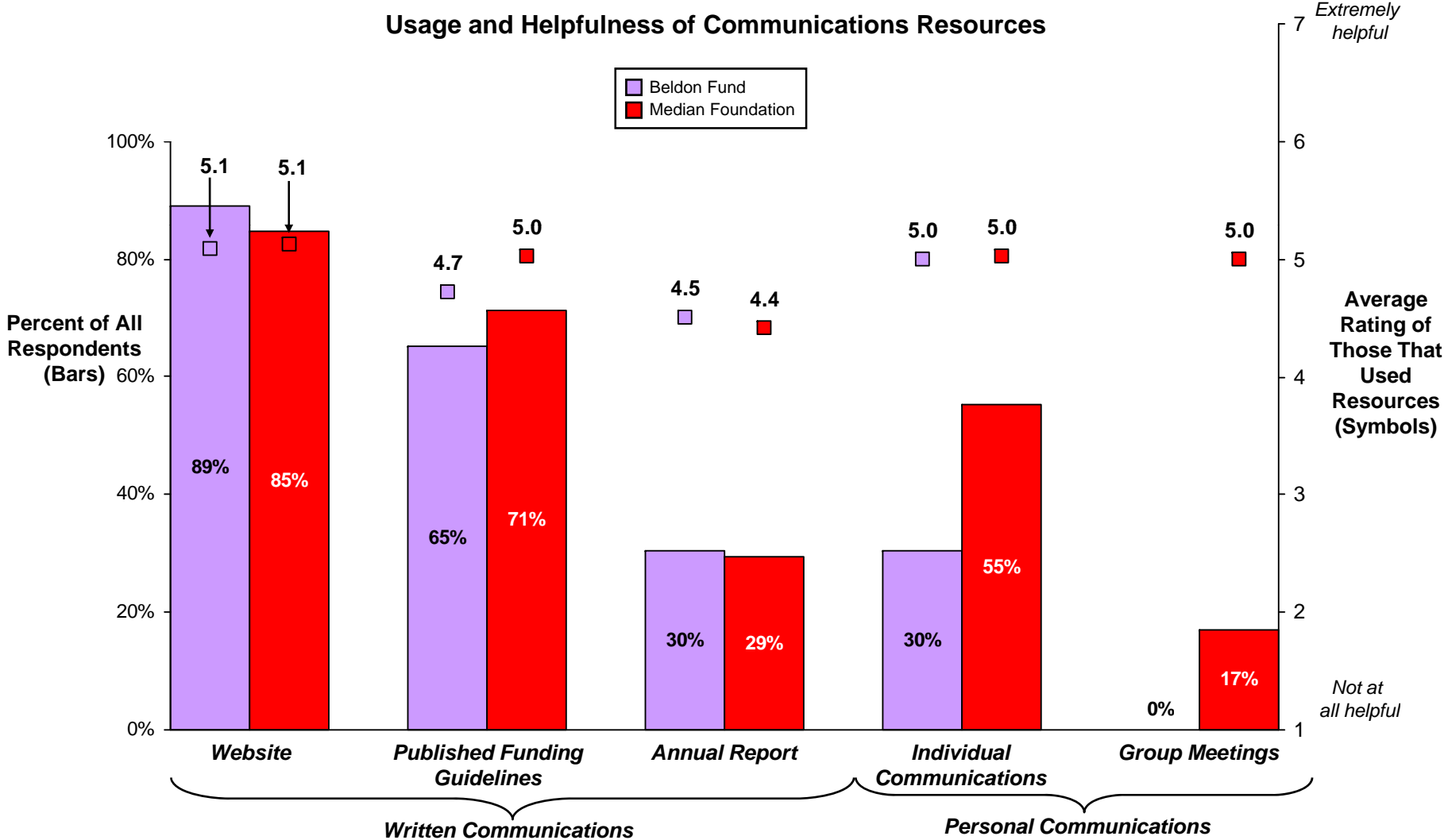
- similarly to the median foundation



# Communications Resources

Compared to the median foundation, a smaller than typical proportion of Beldon’s declined applicants report using individual communications or group meetings with Foundation staff to learn about the Fund.

Usage and Helpfulness of Communications Resources

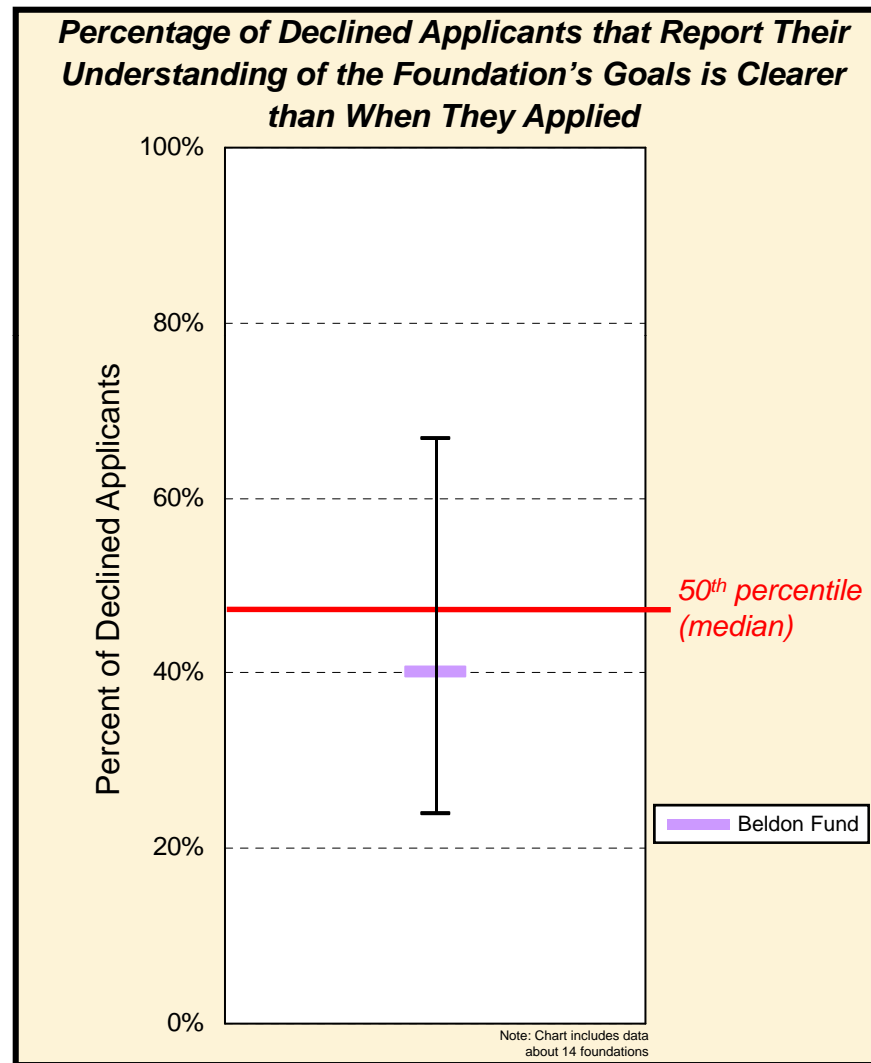


Note: This chart includes data about 18 foundations.

# Change in Understanding of Foundation Goals

The proportion of Beldon declined applicants that indicate that the Fund's goals were clearer at the time they completed this survey than when they applied for funding is:

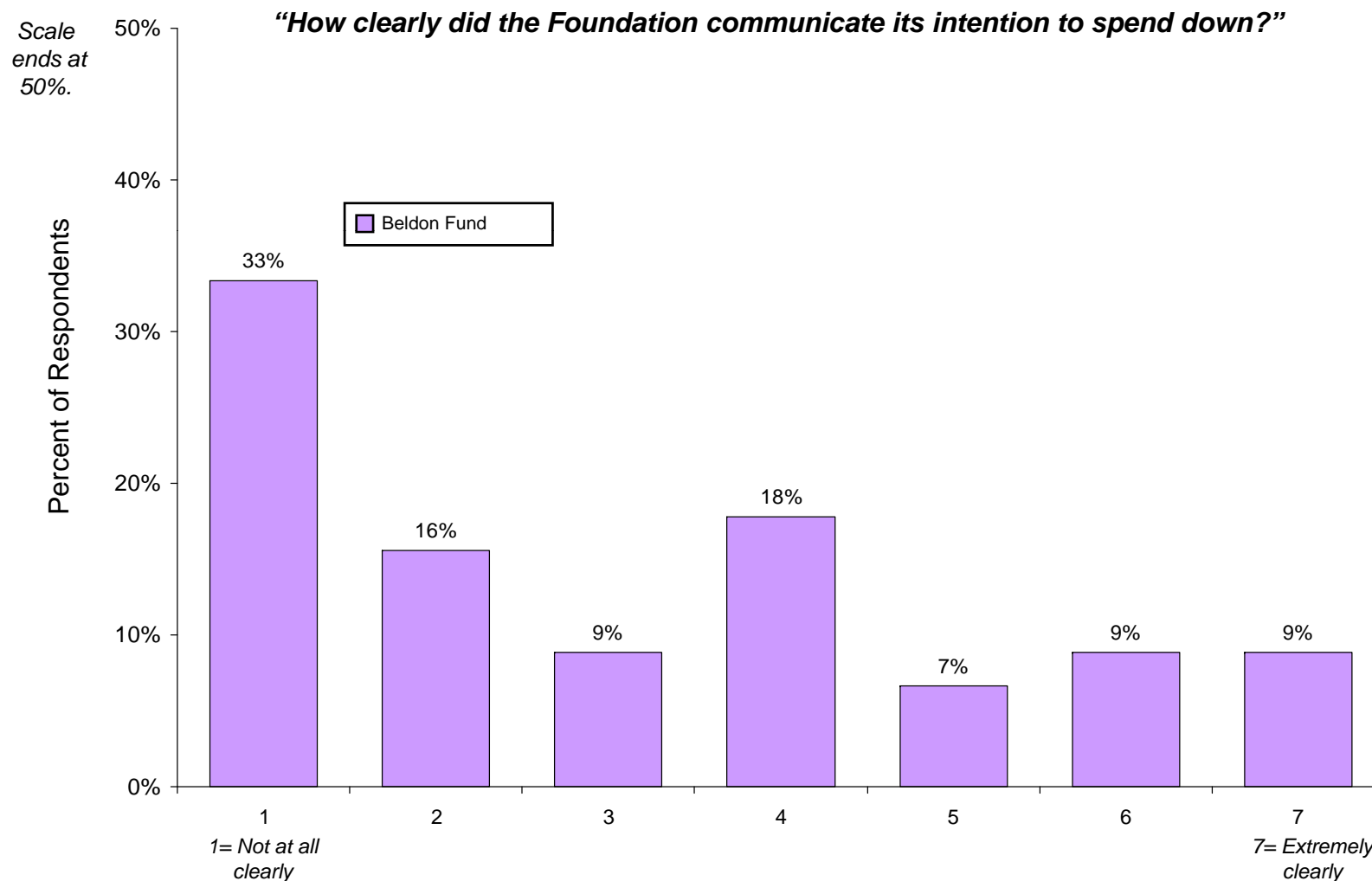
- similar than that of the median foundation





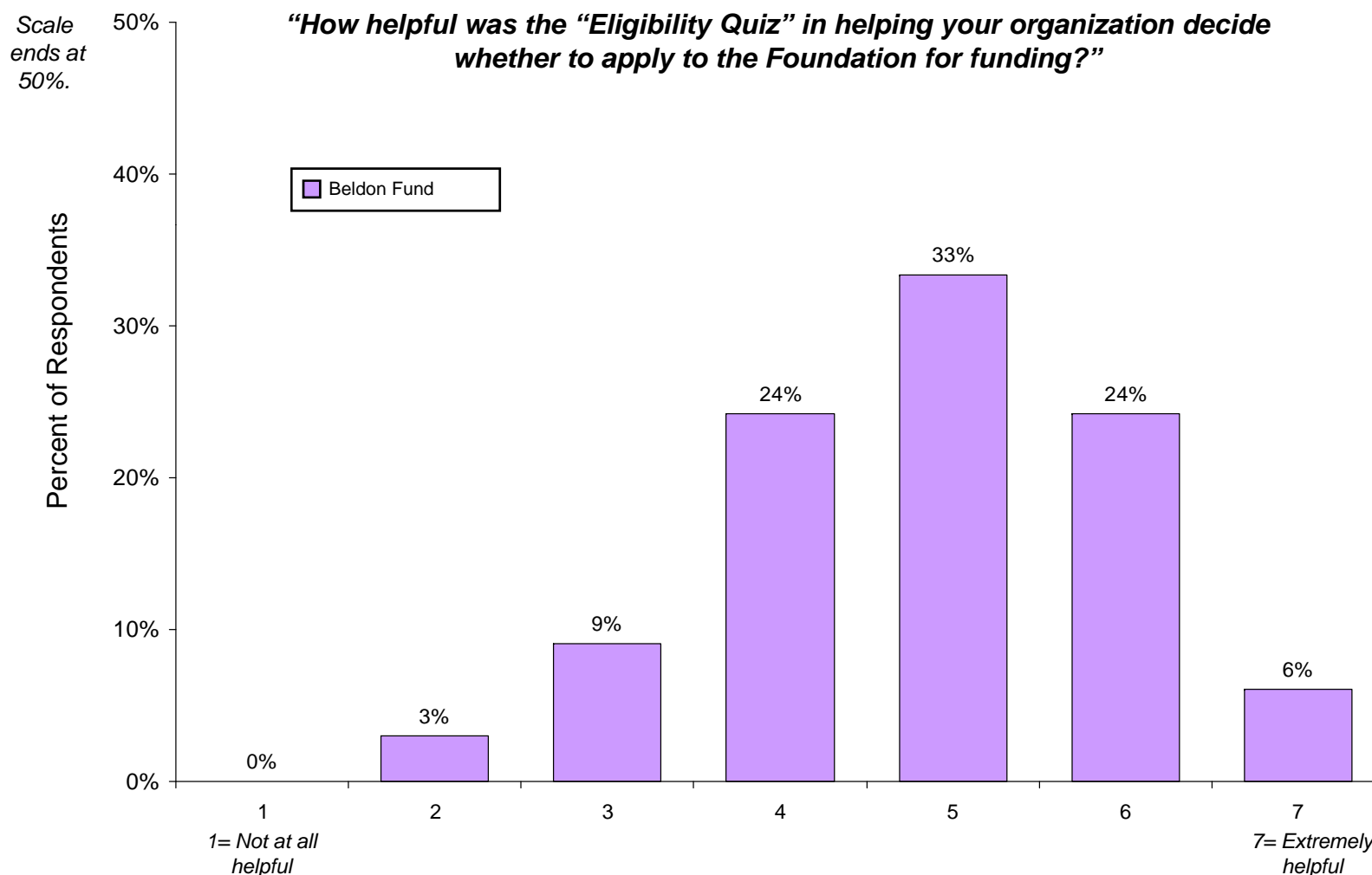
# Communication About Spend Down

At the time they completed the survey, 46 percent of Beldon declined applicants were aware that the Fund will no longer be awarding grants after 2008. Beldon declined applicants were asked to rate the clarity with which the Fund communicated its intention to spend down and gave an average rating of 3.1, where 1= “not at all clearly” and 7 = “extremely clearly.”



# Beldon Eligibility Quiz (1)

Fifty-six percent of Beldon declined applicants used the Fund’s grantee “Eligibility Quiz” to help their organization figure out whether there was a good fit between their work and the Fund’s priorities. Declined applicants that used the “Eligibility Quiz” were asked to rate its helpfulness in helping their organization decide whether to apply for funding and gave an average rating of 4.8, where 1= “not at all helpful” and 7 = “extremely helpful.”



## Beldon Eligibility Quiz (2)

Beldon declined applicants that used the Fund's grantee "Eligibility Quiz" to help their organization figure out whether there was a good fit between their work and the Fund's priorities were asked to provide any comments they had about the utility of the "Eligibility Quiz." The seven responses CEP received are below.

### Positive Comment

- "The eligibility quiz is a great asset to the grant writer. If my project doesn't fit, I don't waste my resources or Beldon's resources."

### Critical Comments

- "The 'EQ' allows for too much wiggle room and will erroneously rule out an organization or, depending on a understanding, include an organization when a short discussion with a Beldon staff person is clearer and most useful."
- "In the end I felt that Beldon has a stable of grantees that is fixed. Although we fit their guidelines, we're never really able to break into their pool of grantees. From our perspective, Beldon is an inside player and not particularly receptive to innovative or new programs or players."
- "Our program seemed to fit within a few of the priorities. I attempted to discuss with a staff member to decide the better fit, to no avail."
- "I routinely take such quizzes; I learned however, that Beldon was spending down when I got the rejection letter. Either that information was not in the eligibility quiz or I overlooked it. As it was, I wasted my time by applying."
- "The quiz clearly showed that our particular vision did not fit with Beldon's guidelines, however, our vision fit with Beldon's vision (our application of the vision was what did not fit) so it seemed as though there should have been another locus for folks in our situation."
- "Seemed like a basic screen but did not give information on types of projects funded."

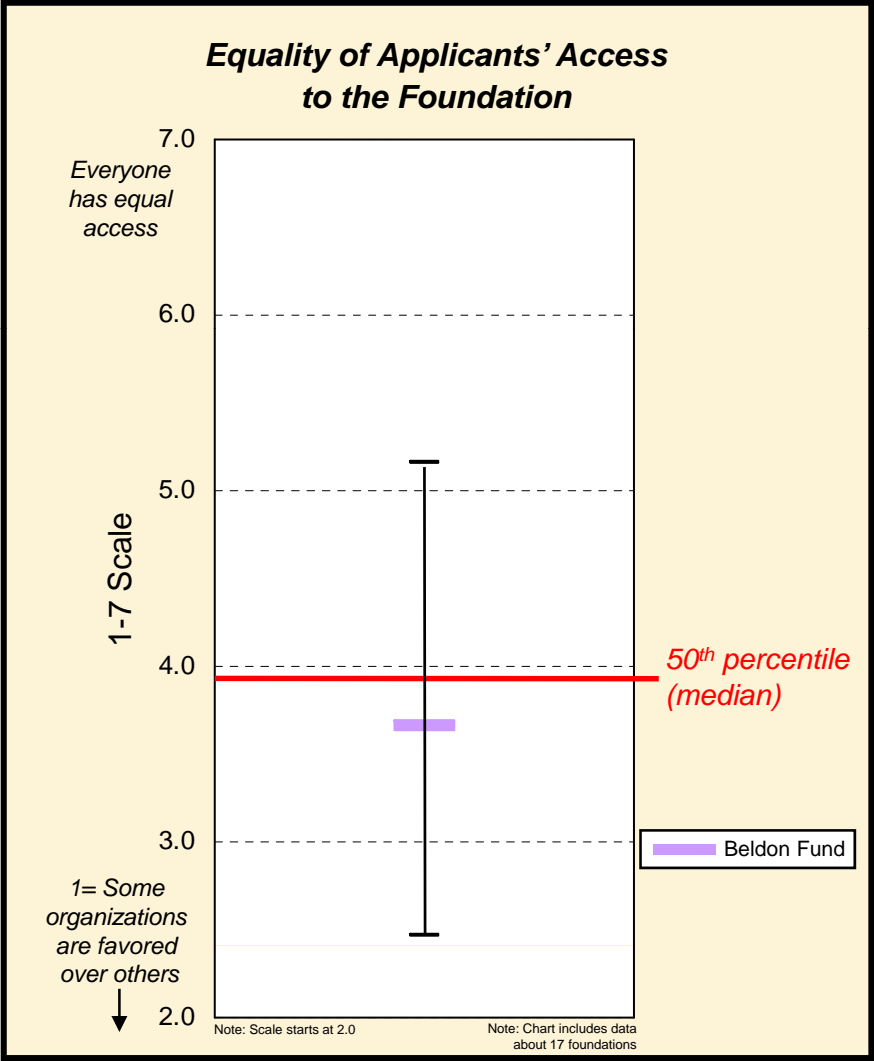
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# Accessibility of the Foundation to Applicants

On equality of access to funding, Beldon is rated:

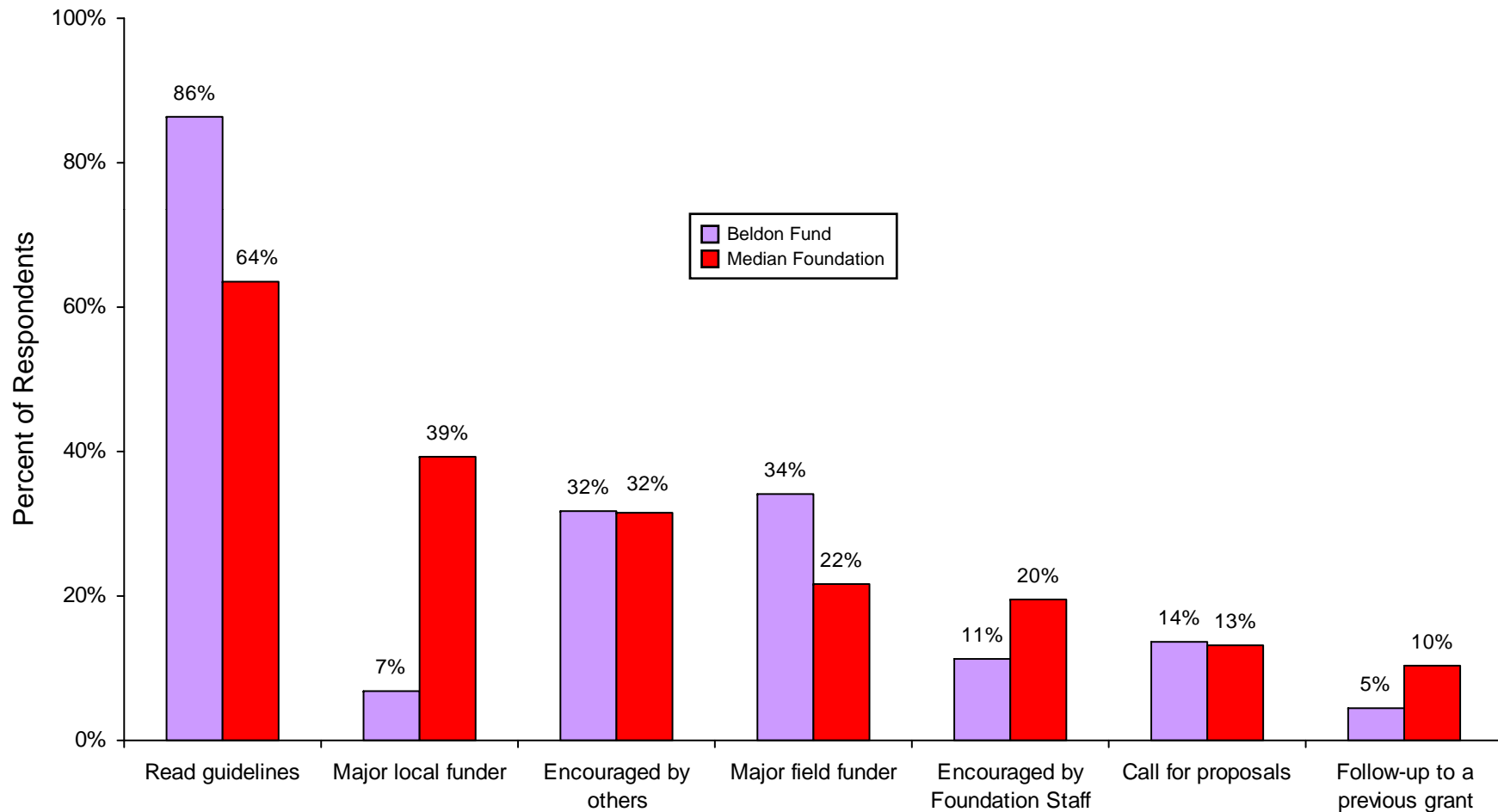
- similarly to the median foundation



# Reasons for Application

A larger than typical proportion of Beldon declined applicants report that a reason for applying for a grant from the Fund was due to reading the Fund's guidelines and thinking that their program fit.

**Reasons for Applying for Funding**

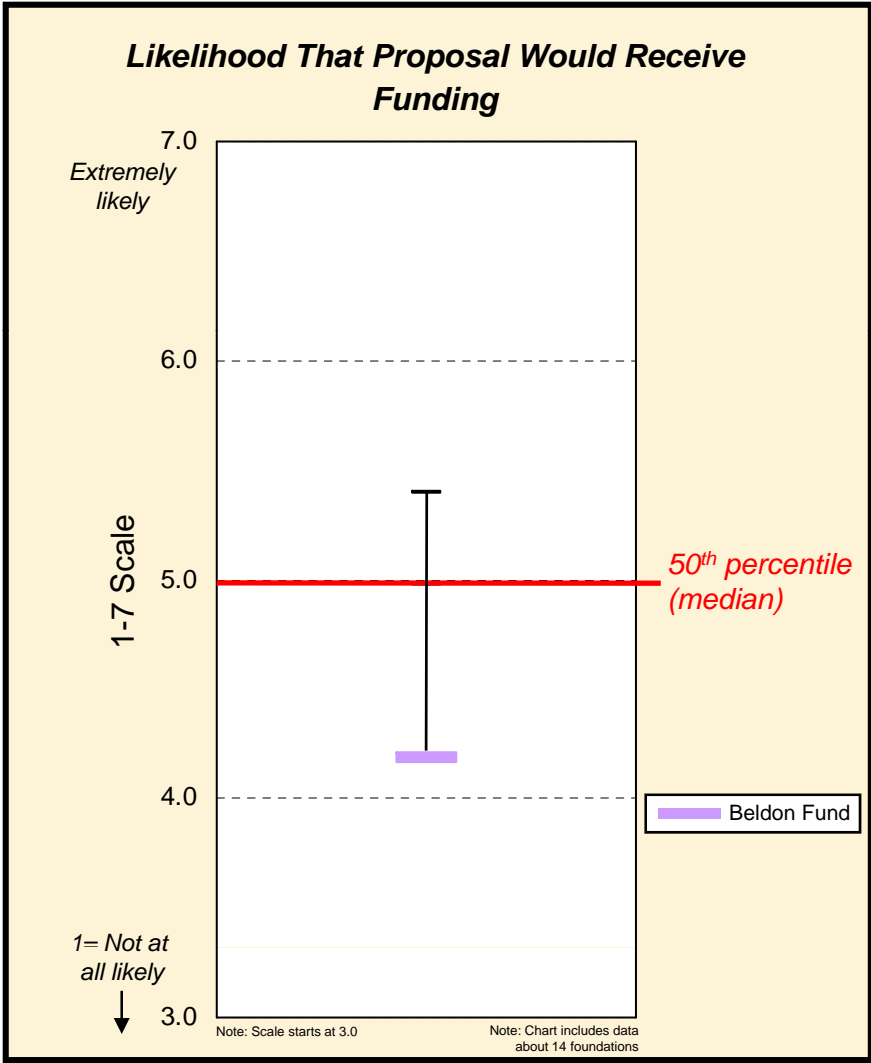


Note: This chart includes data about 25 foundations, with the exception of two categories: "major field funder" and "call for proposals" includes data about 18 foundations.

# Likelihood of Receiving Funding

On declined applicants' belief that their proposal would receive funding, Beldon is rated:

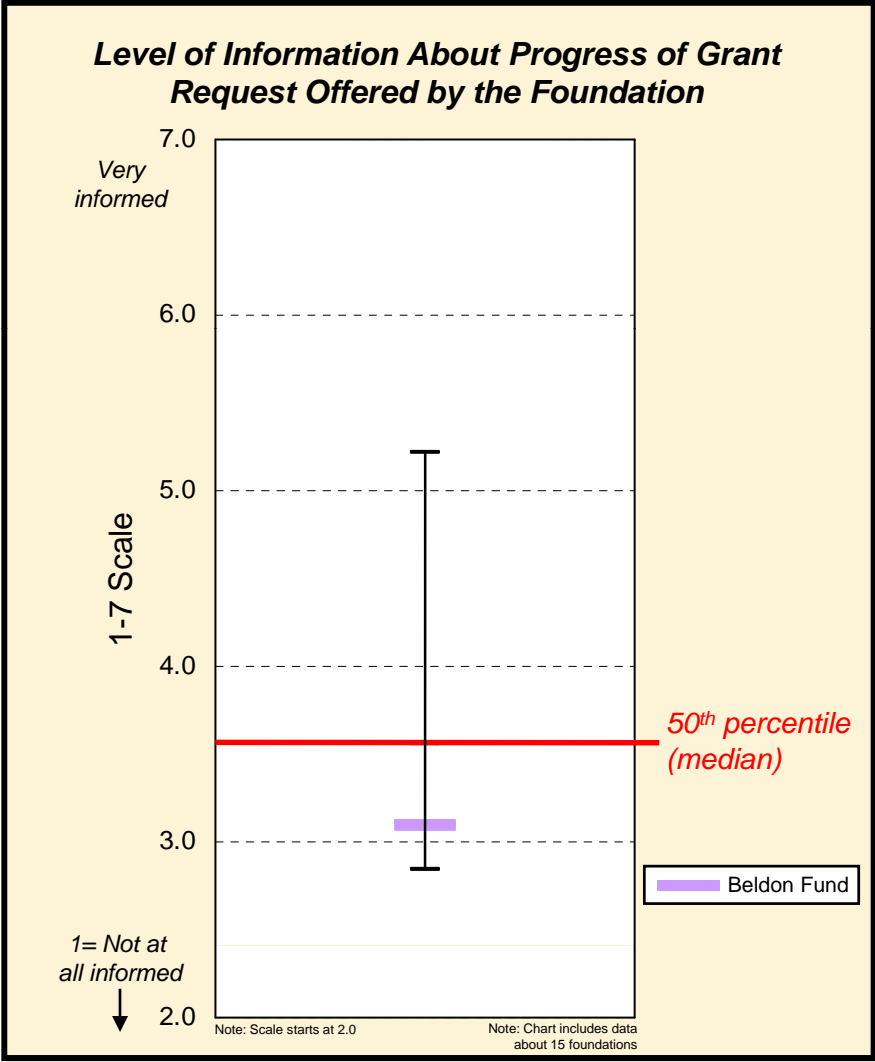
- below all other foundations



# Communication During Selection Process

On level of information about progress of grant request offered by the Fund, Beldon is rated:

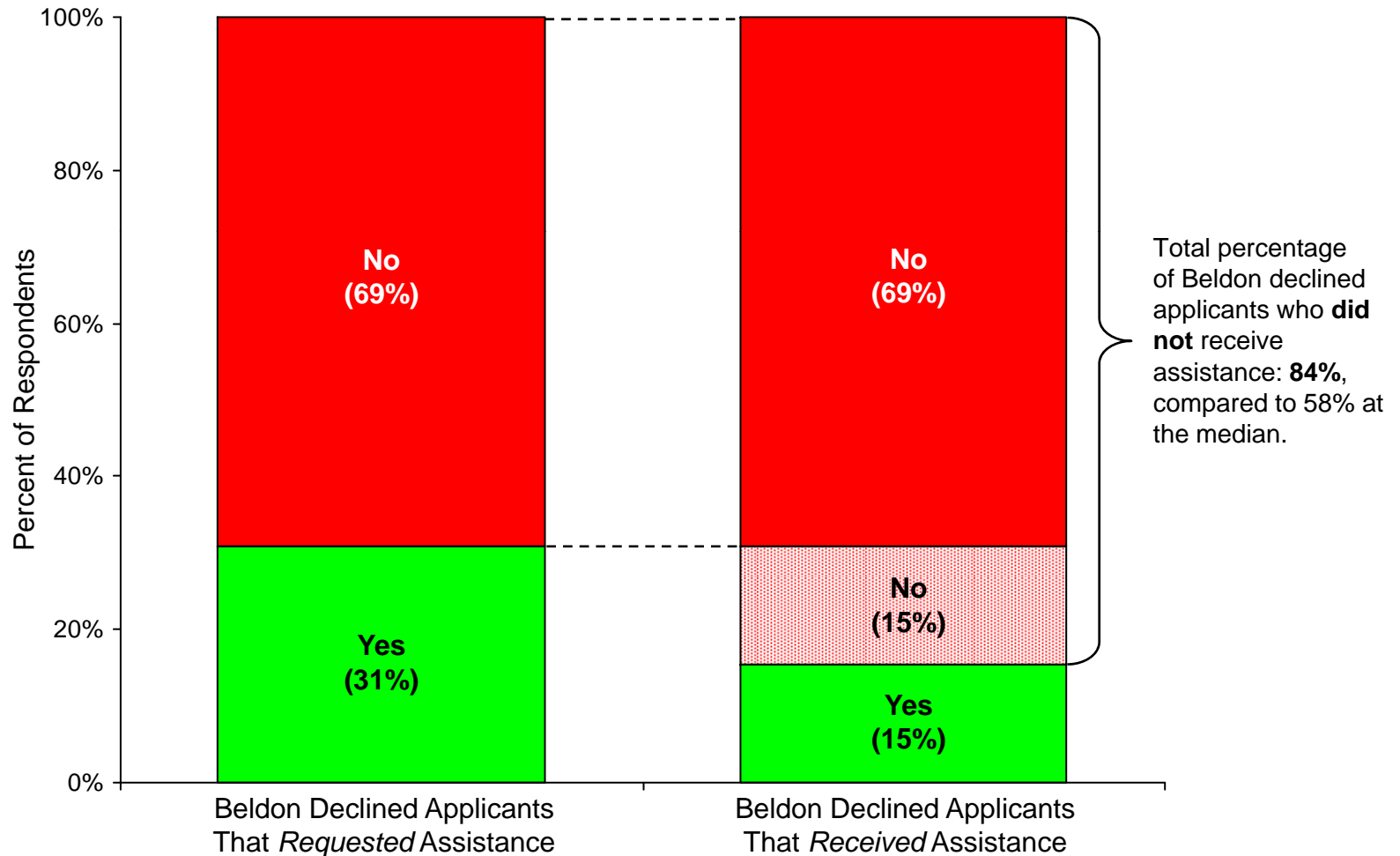
- below to the median foundation





# Foundation Involvement in Proposal Development (1)

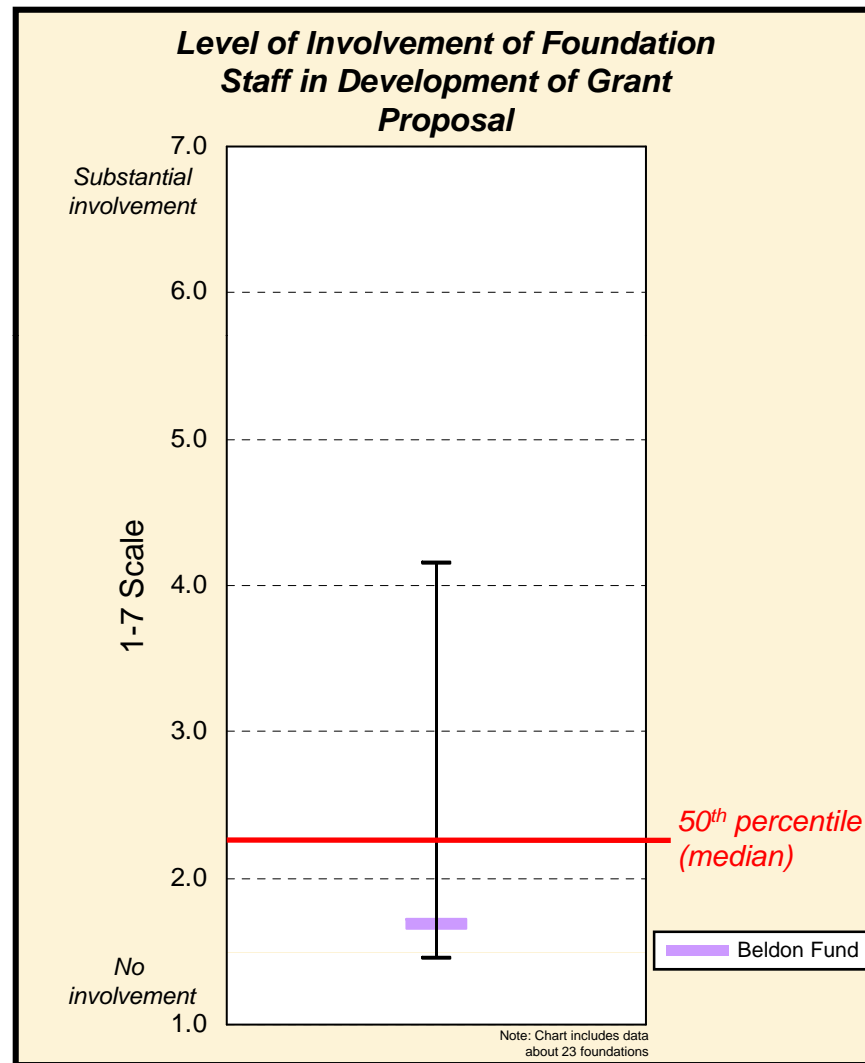
Half of Beldon declined applicants that requested assistance during the development of their grant proposal received it.



# Foundation Involvement in Proposal Development (2)

On the level of staff involvement in the development of declined applicants' proposals, Beldon is rated:

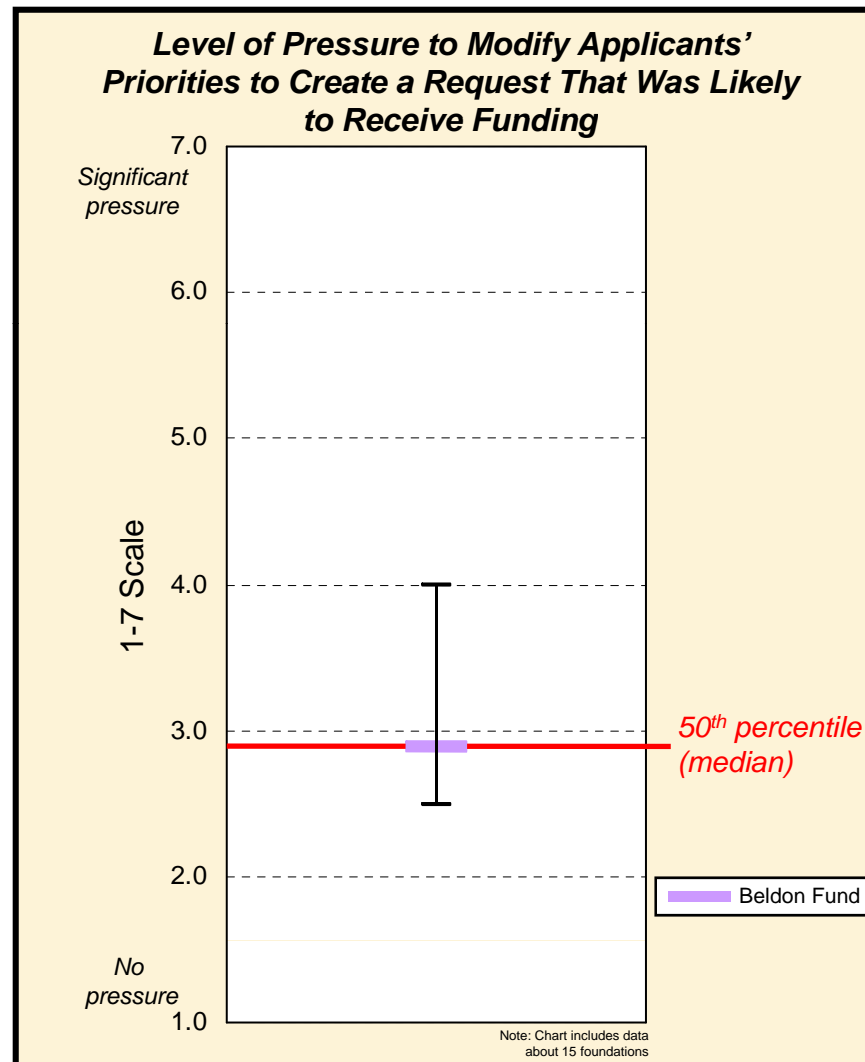
- below the median foundation



# Pressure in Selection Process

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

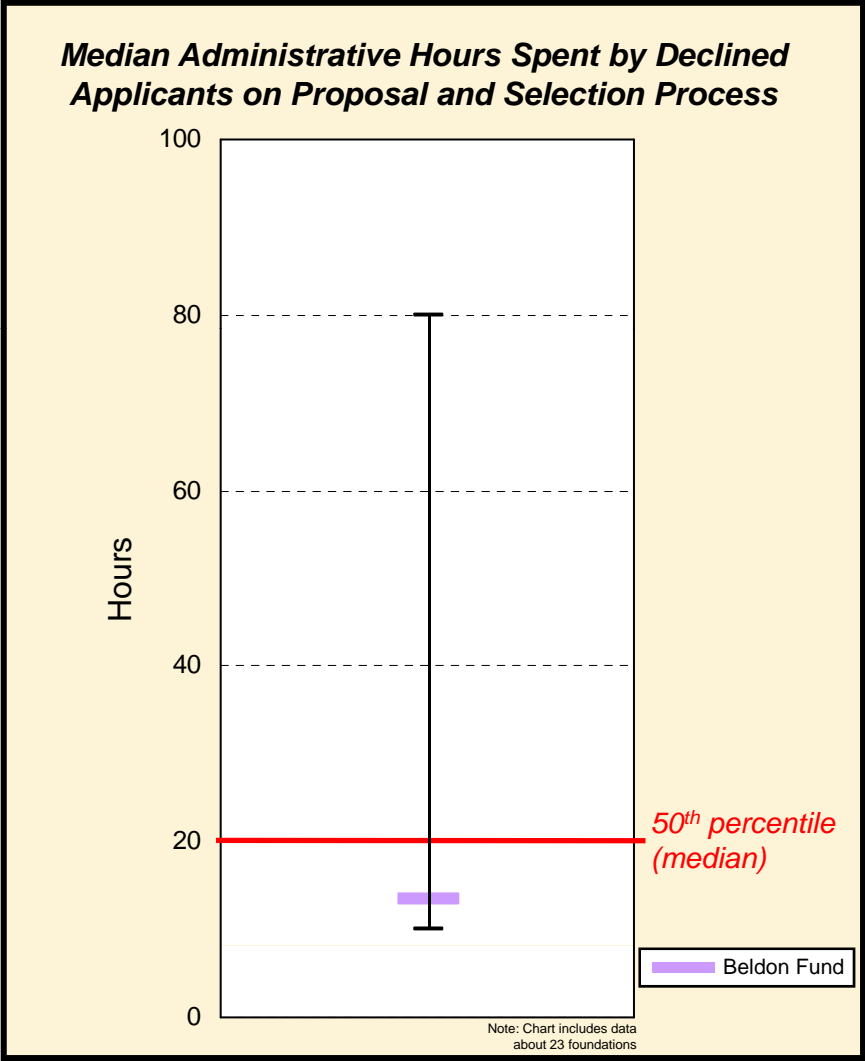
- similarly to the median foundation



# Administrative Time

At the median, the number of hours of administrative time spent by Beldon declined applicants during the selection process is:

- less than the time spent by declined applicants of the median foundation

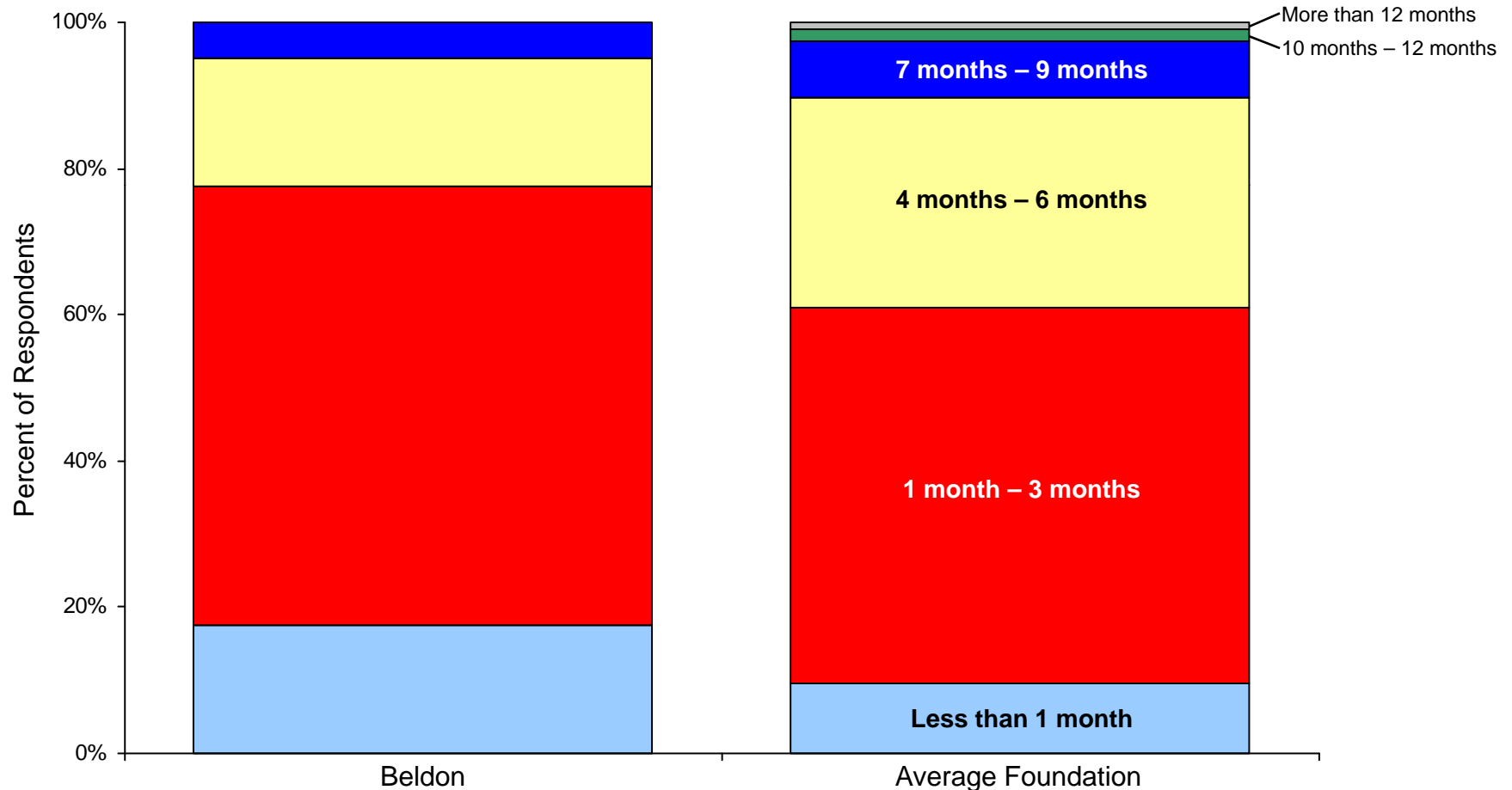


# Time Between Submission and Funding Decision

The proportion of Beldon declined applicants that report that three months or less elapsed between submission of proposal and the decision not to fund the proposal is:

- greater than that of the average foundation

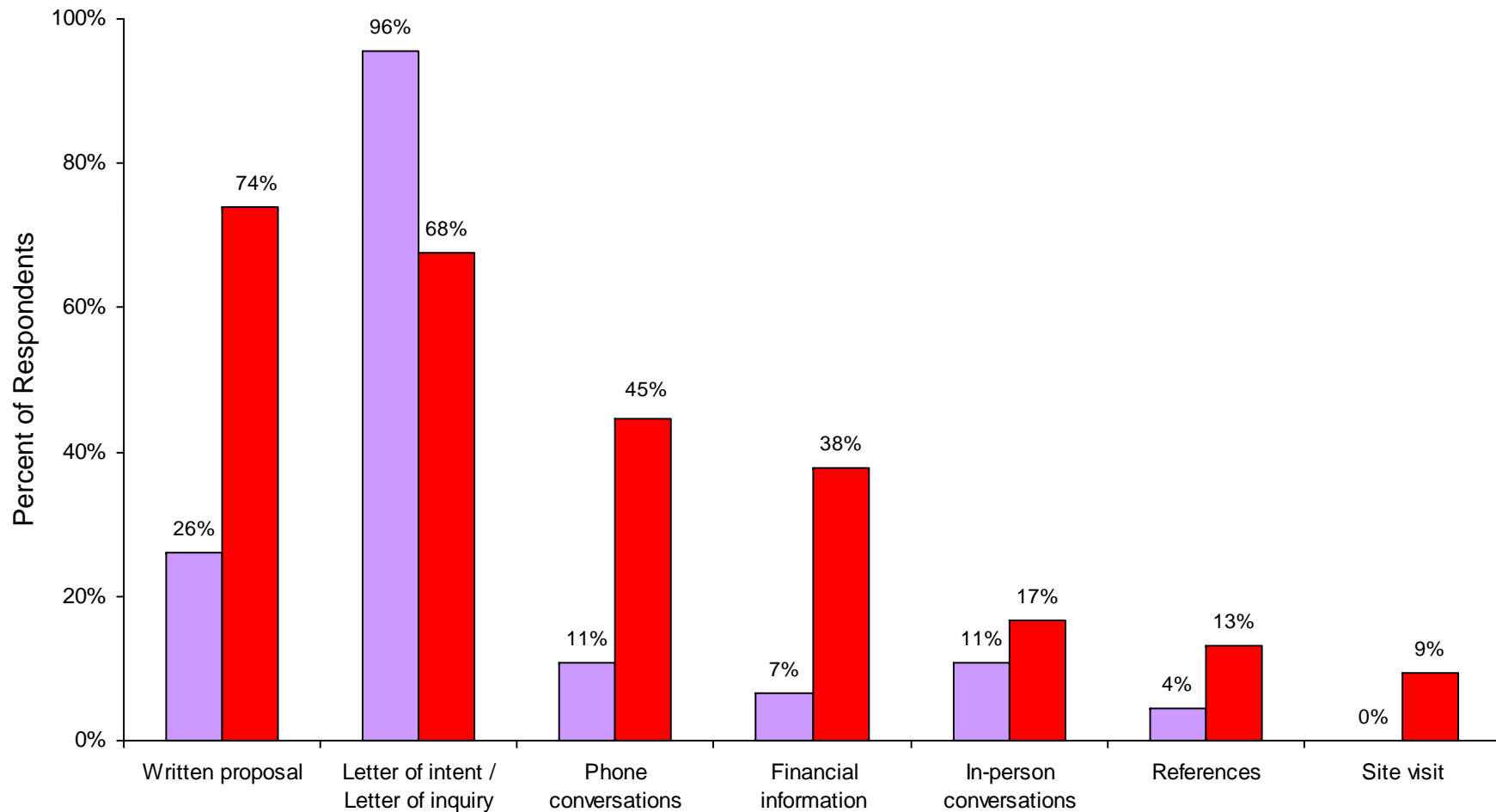
***Time Elapsed Between Proposal Submission and Final Decision Not to Fund Request***



# Data Requested During Selection Process

Compared to declined applicants of the median foundation, Beldon declined applicants more frequently report submitting a letter of intent/inquiry as part of the selection process and less frequently report engaging in other components of the process.

**Data Requested by the Foundation During the Selection Process**



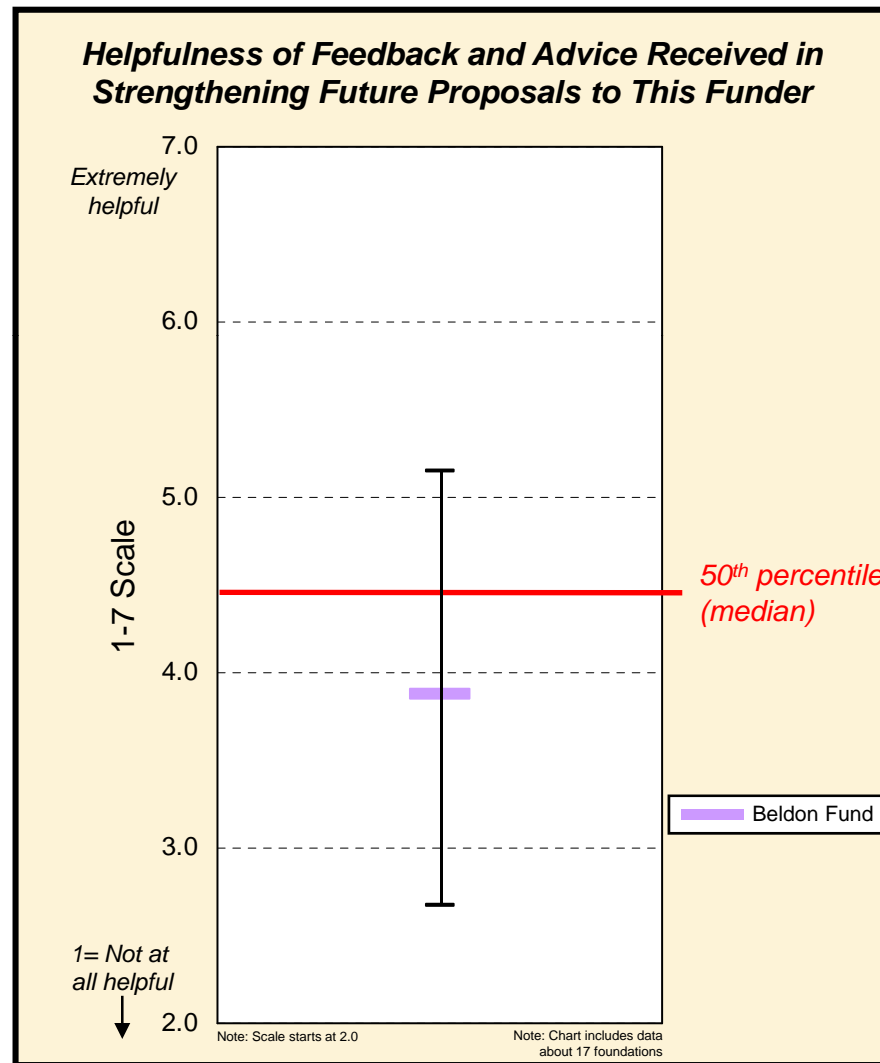
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# Helpfulness of Feedback Received (1)

On the helpfulness of feedback and advice received in strengthening future proposals to the Fund, Beldon is rated:

- below the median foundation

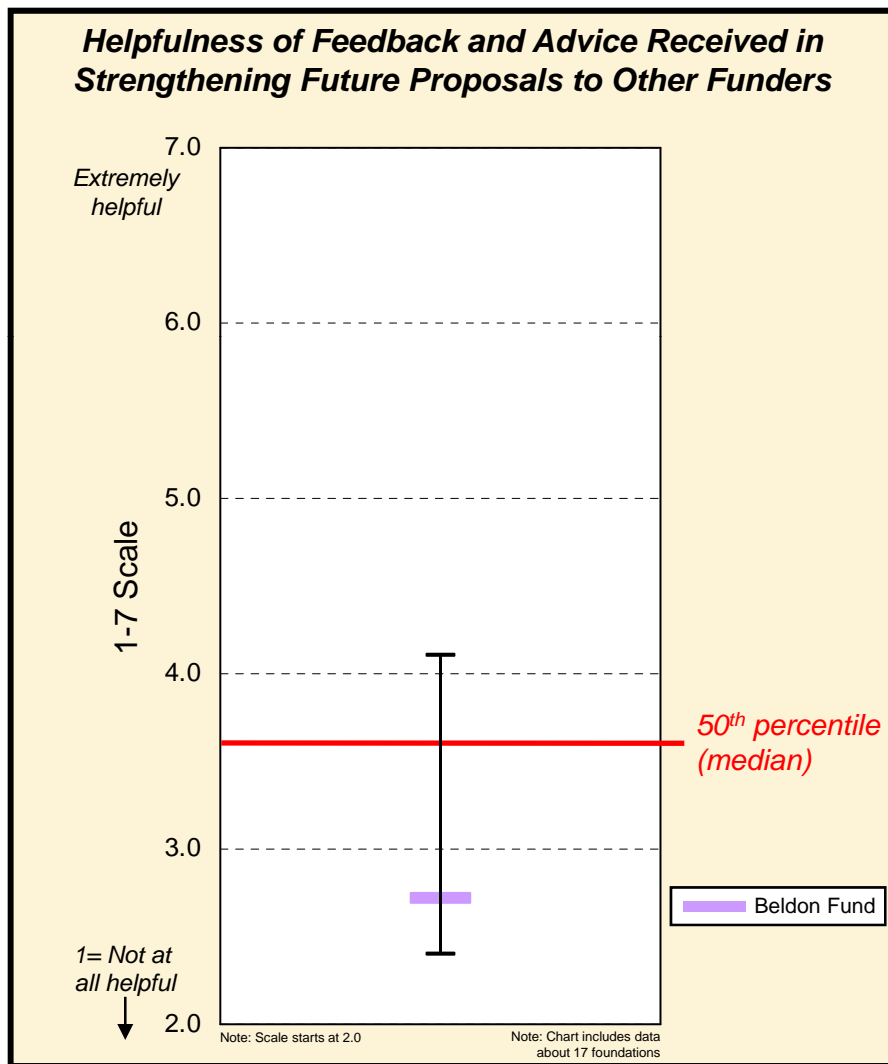




# Helpfulness of Feedback Received (2)

On the helpfulness of feedback and advice received in strengthening future proposals to other funders, Beldon is rated:

- below to the median foundation

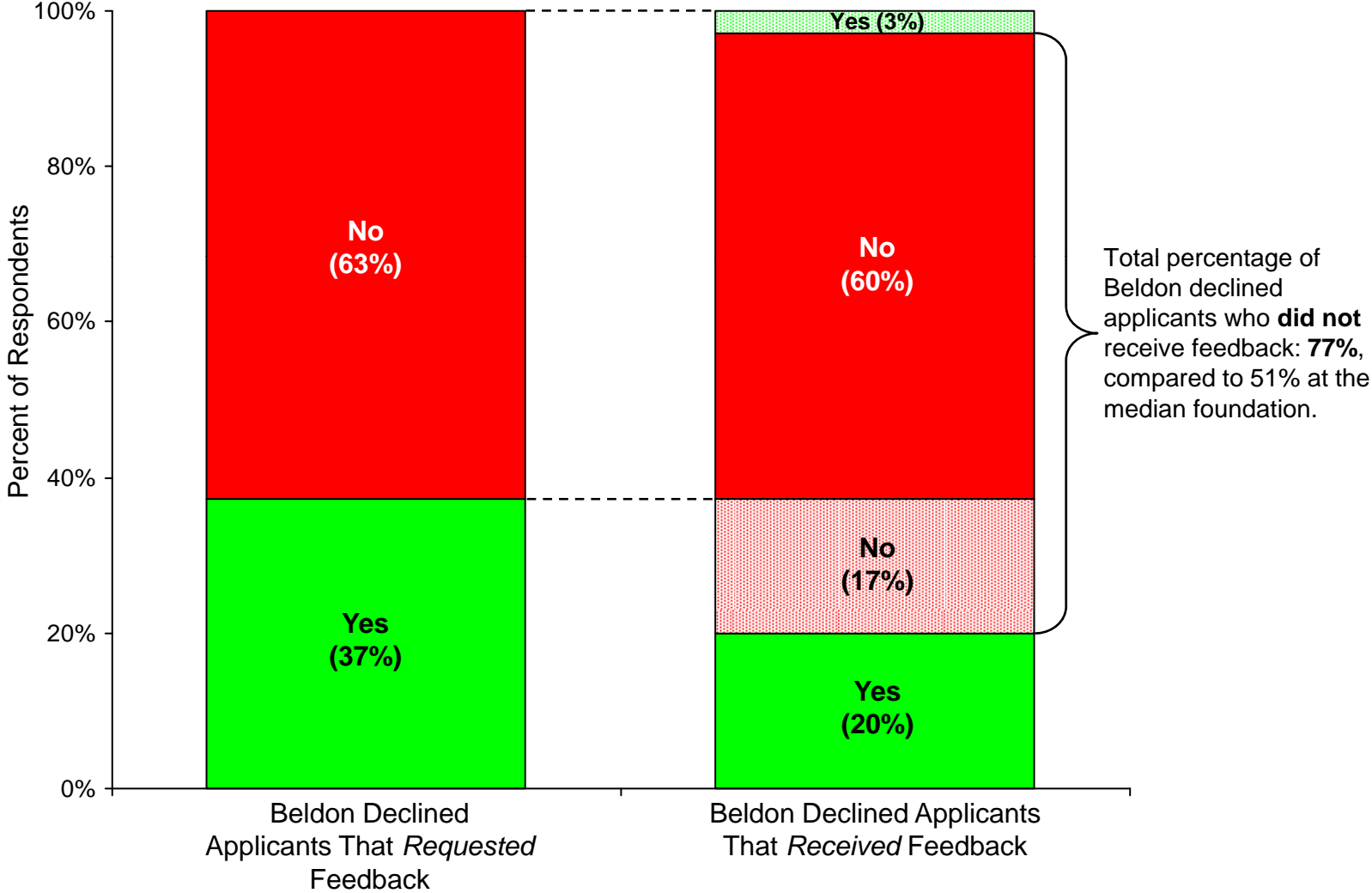


## Selected Declined Applicant Comments

- ♦ “Form letter rejection [was] disappointing, given [the] nature of [the] proposal.”
- ♦ “Feedback on why our letter of inquiry did not qualify us for submitting a proposal would have been nice.”

# Feedback on Declined Applications

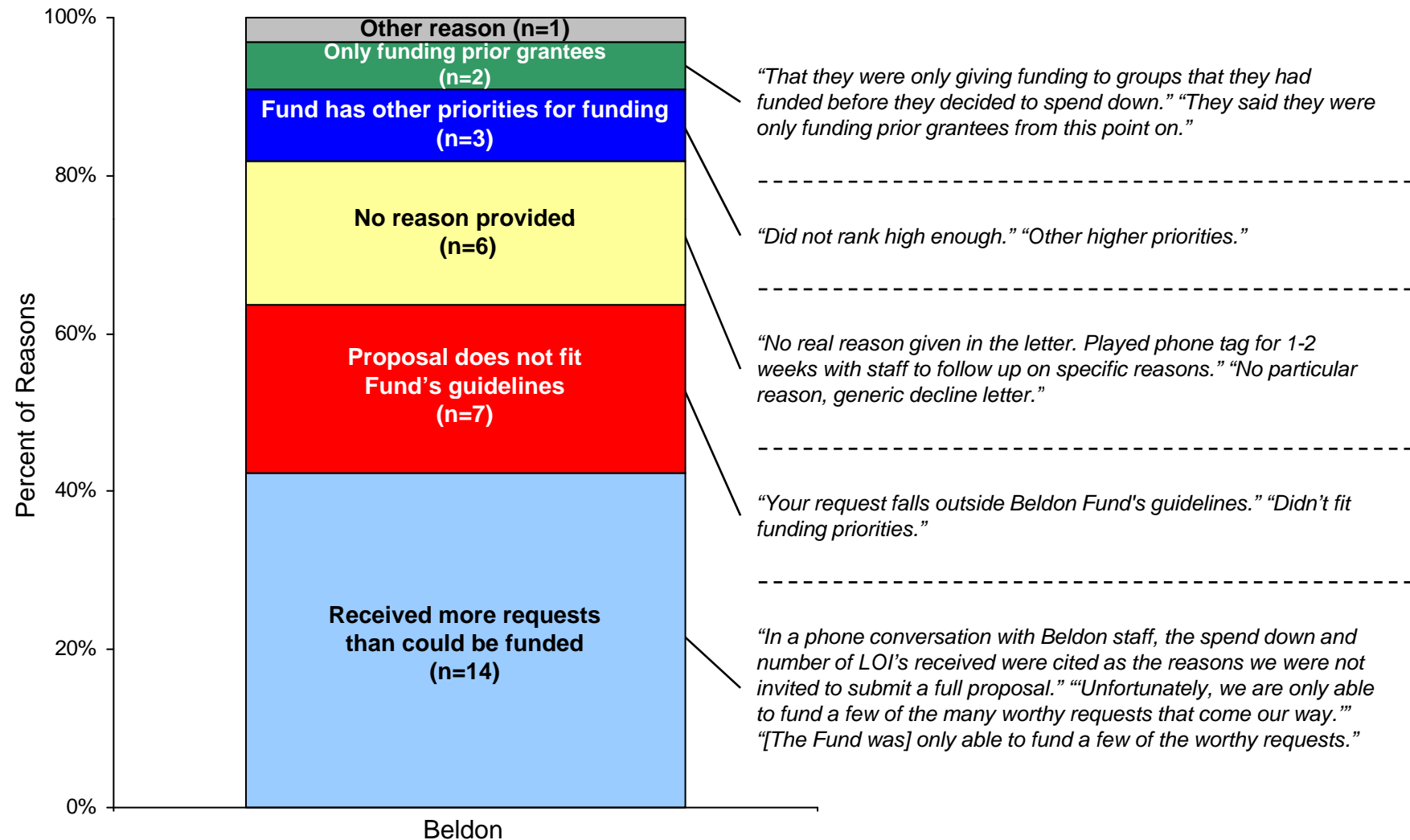
Less than a quarter of Beldon declined applicants received feedback on their applications.



# Reasons Provided for Proposal Declines

Declined applicants were asked to indicate the reason(s) the Fund gave when it declined to fund their proposal. The most frequently mentioned reasons include that the Fund received many requests and could only fund a few or that the grant request fell outside of the Fund's current funding priorities.

**Reasons for Decline Provided by Fund**

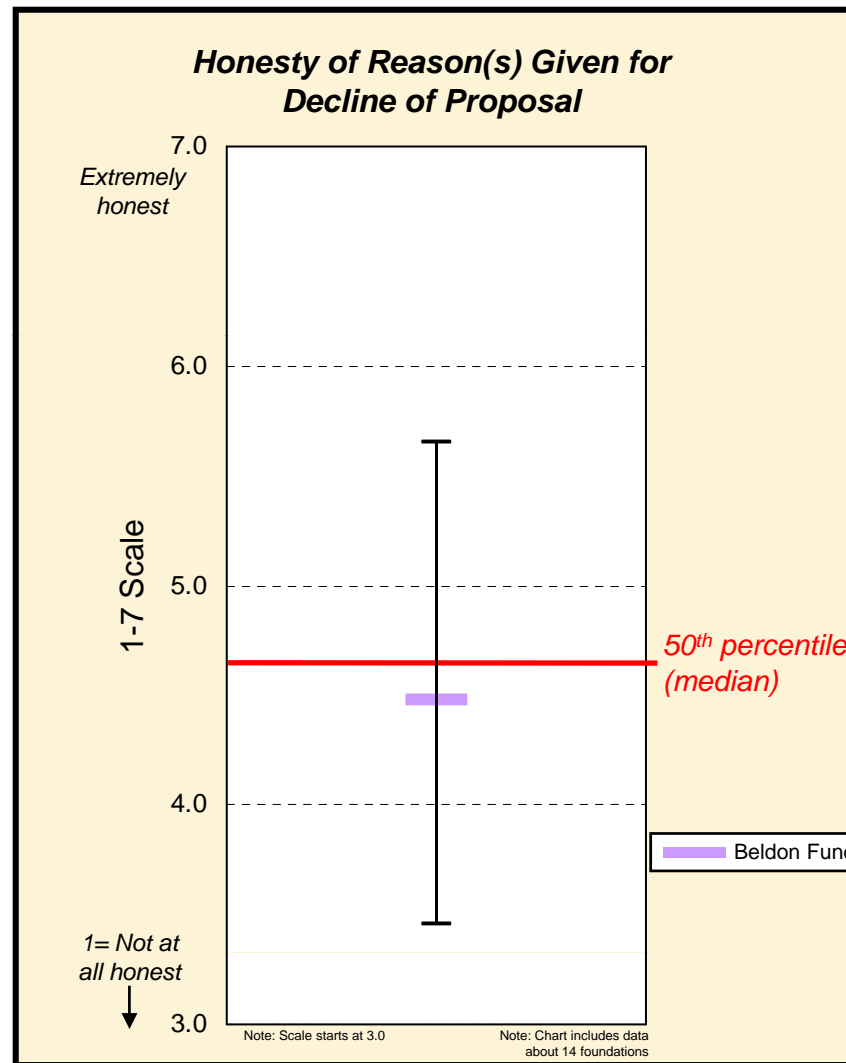


Note: Each applicant provided only one reason for decline provided by the Fund.

# Honesty of Reason Given for Decline of Proposal

On honesty of the reason(s) the Foundation gave for declining applicants' proposals, Beldon is rated:

- similarly to the median foundation



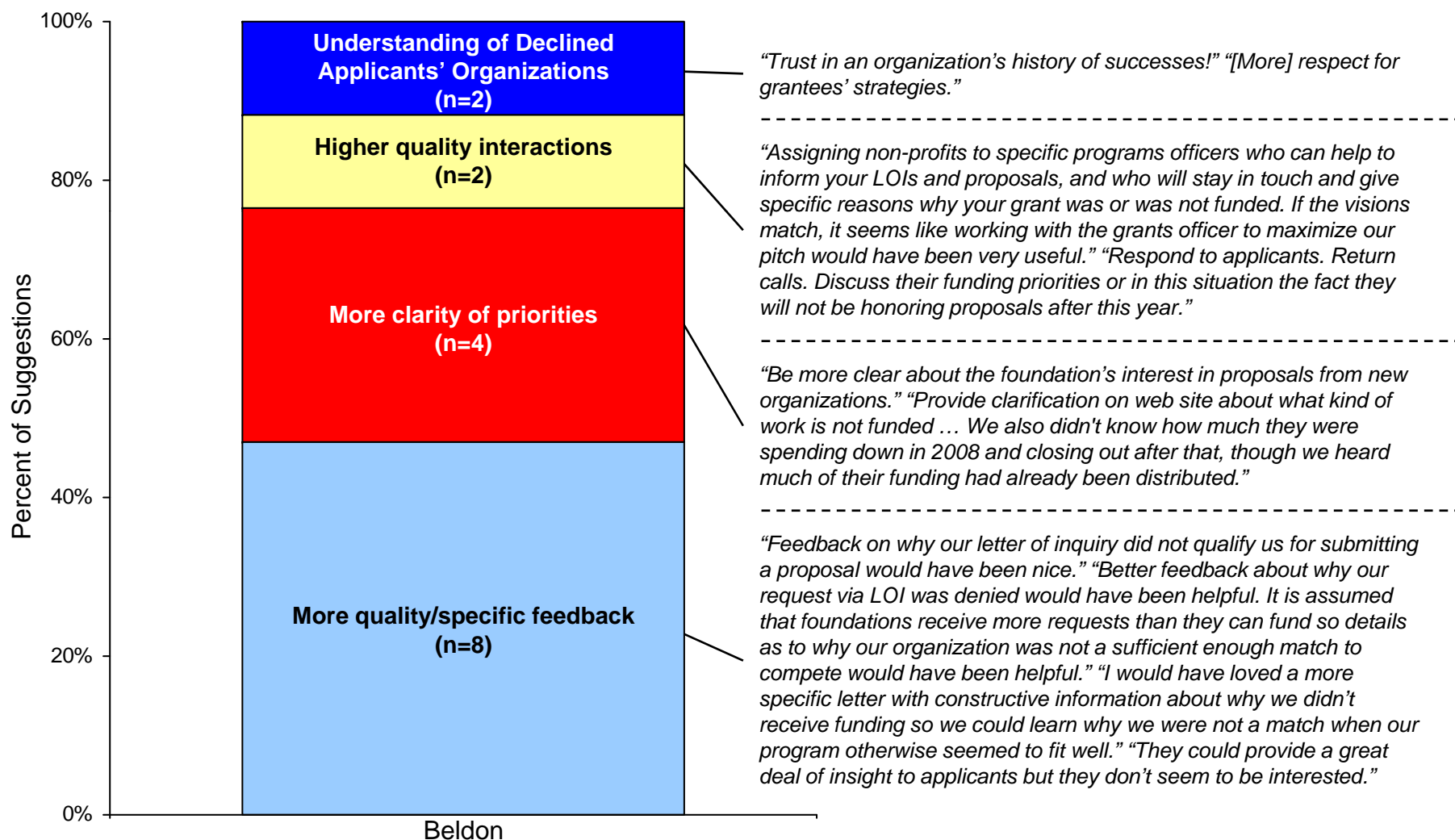
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# Applicant Suggestions for the Foundation (1)

Declined applicants were asked to provide any suggestions for how the Fund could improve. The most frequently mentioned suggestion concerns more specific feedback on why their application was not accepted.

**Topics of Declined Applicant Suggestions**



Note: There were a total of 17 declined applicant suggestions for Beldon.

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# Review of Findings

Chart shows Beldon's percentile rank among all foundations in the comparative set.

Indicator	Percentile					Description
	0th	25th	50th	75th	100th	
Impact on the Field			◆			Declined applicants were asked to rate the foundation's impact on their fields.
Impact on the Community	◆					Declined applicants were asked to rate the foundation's impact on their local communities.
Responsiveness		◆				Declined applicants were asked to rate the responsiveness of foundation staff.
Fairness		◆				Declined applicants were asked to rate the fairness of treatment by foundation staff.
Clarity of Communication of Goals and Strategy			◆			Declined applicants were asked to rate the clarity of the foundation's communication of its goals and strategy.
Helpfulness of Feedback		◆				Declined applicants were asked to rate the helpfulness of the feedback from the foundation in strengthening future proposals to other funders.
Administrative Time		◆				Declined applicants were asked to report the amount of time spent on the application process of the foundation.



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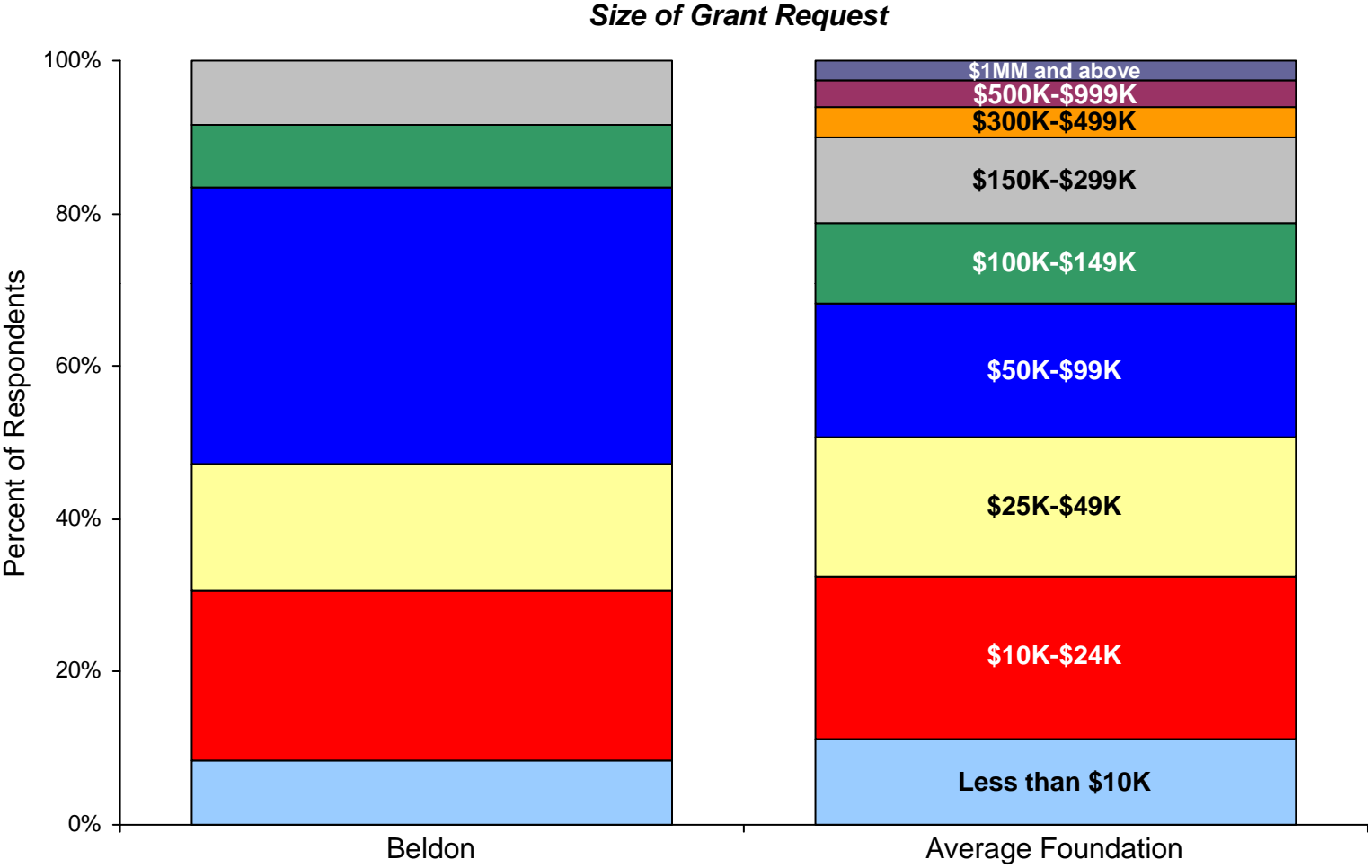
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# Grant Request Size

At the median, the grant request size reported by Beldon declined applicants is:

- similar to that of the average foundation



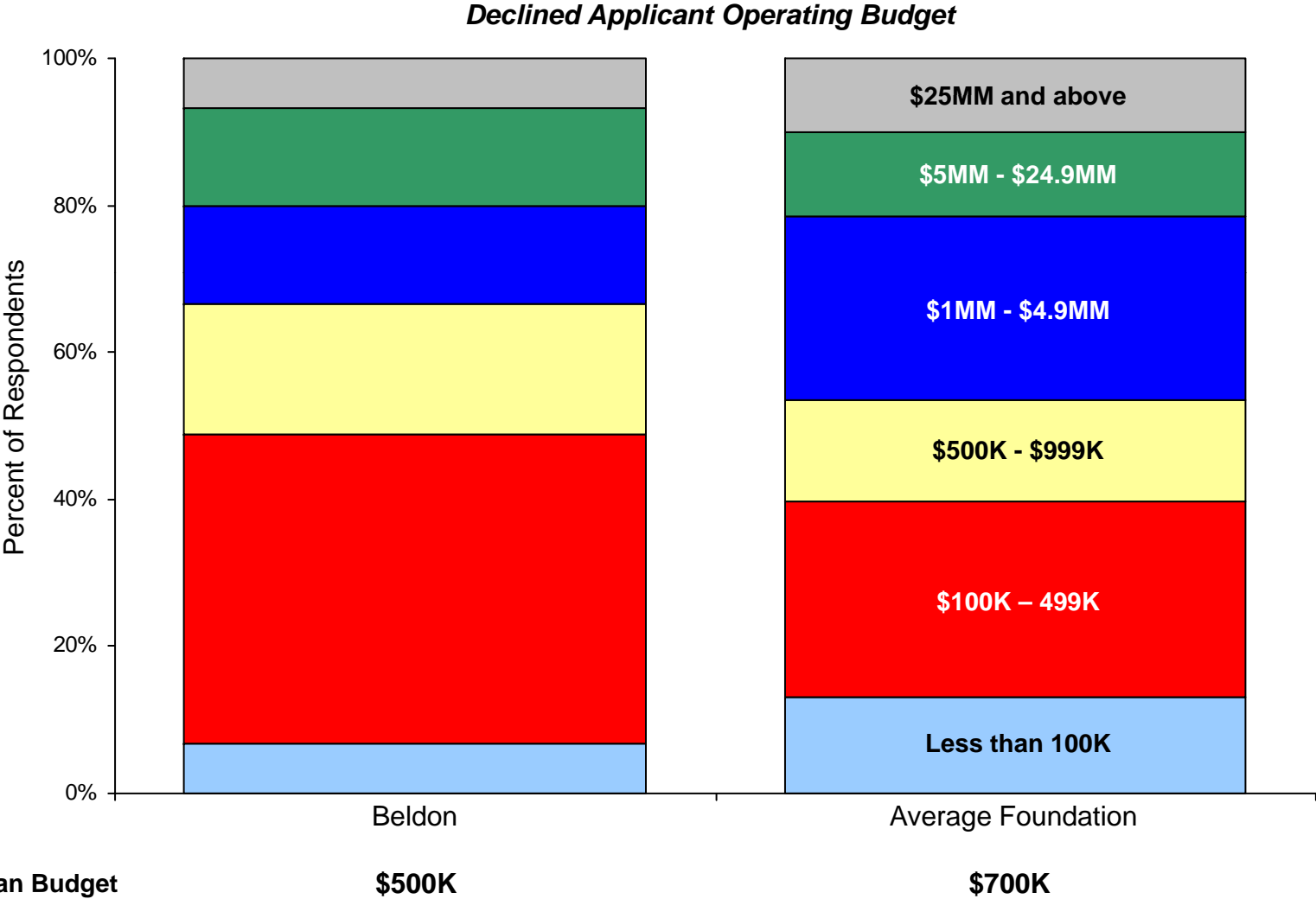
**Median Grant Request** **\$50K**

**\$50K**

# Declined Applicant Operating Budget

The median budget of Beldon declined applicants is:

- smaller than that of the average foundation

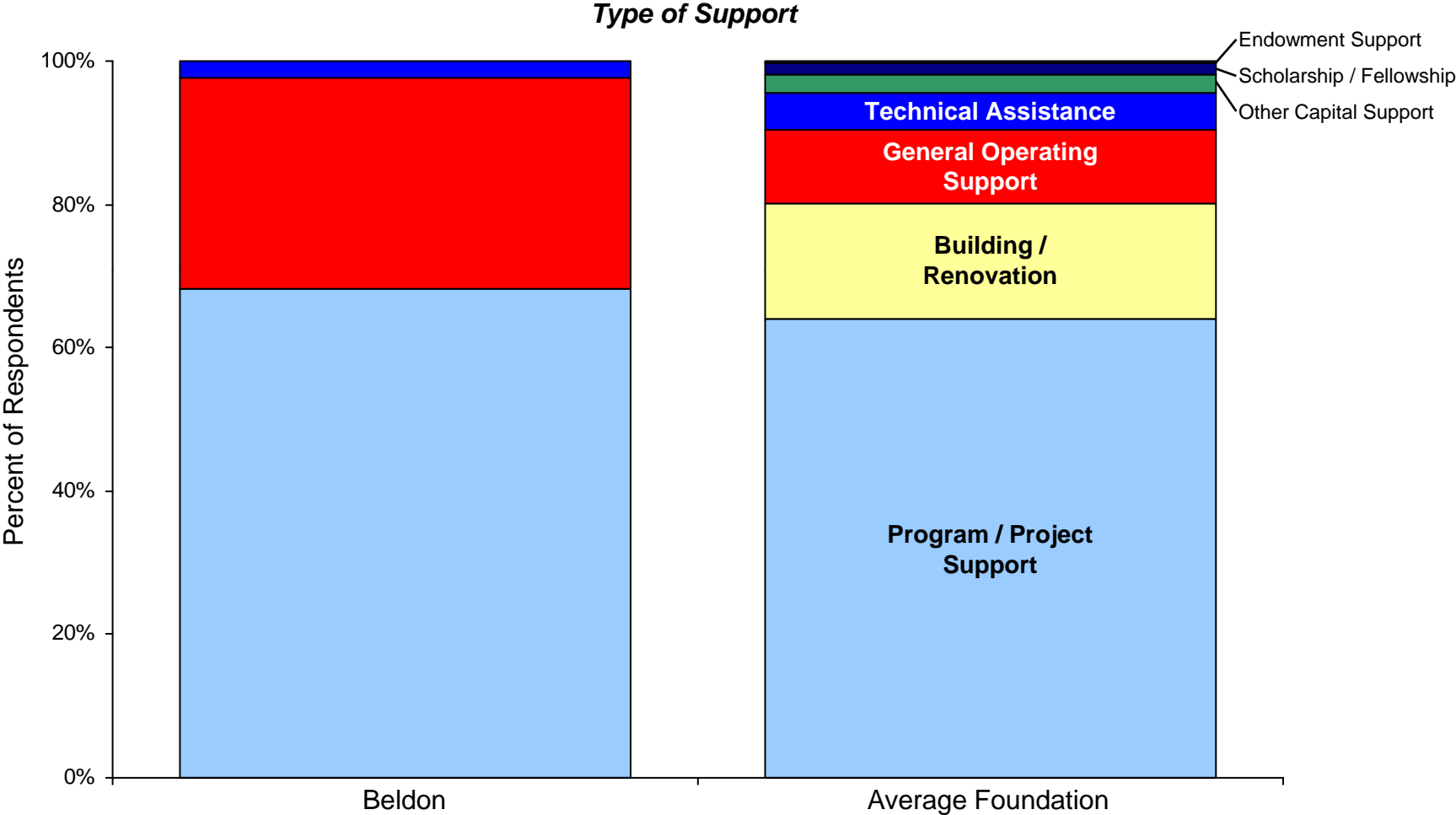


Note: Chart includes data about 25 foundations.

# Type of Support

The proportion of Beldon declined applicants that request general operating support from the Fund is:

- larger than that of the average foundation

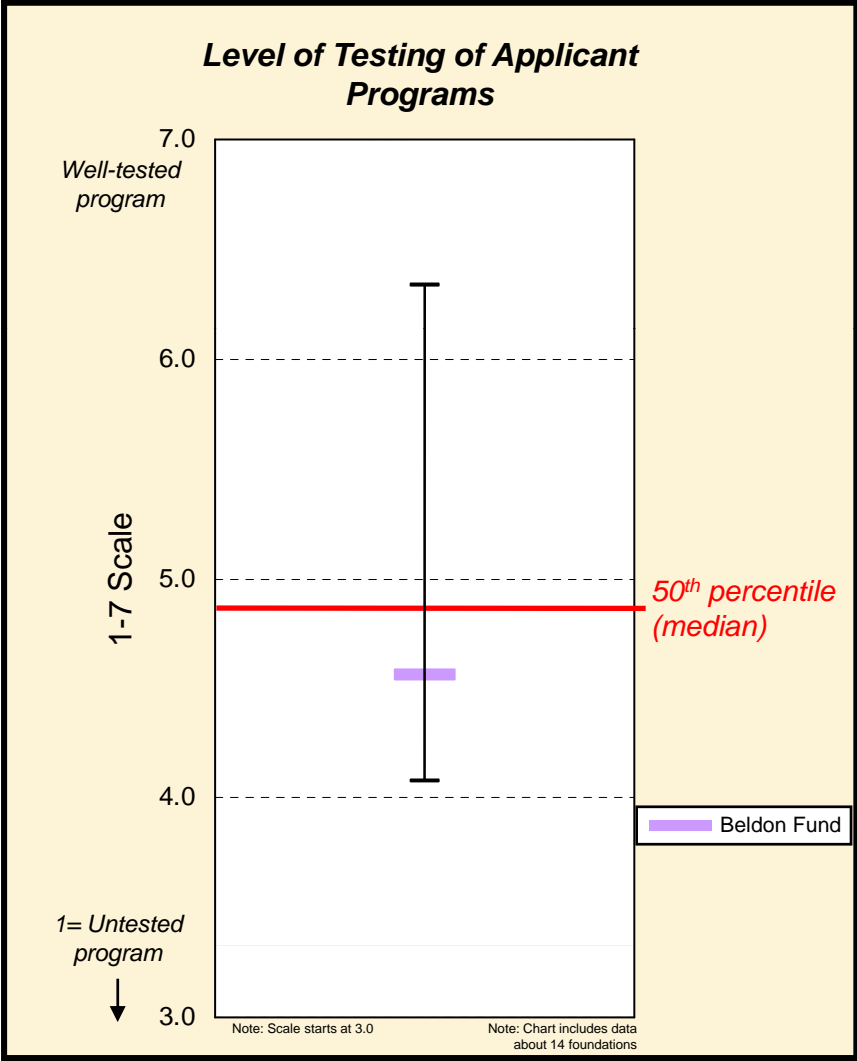


Note: Chart includes data about 14 foundations.

# Level of Testing of Applicant Programs

The average level of testing of projects declined funding by the Fund is:

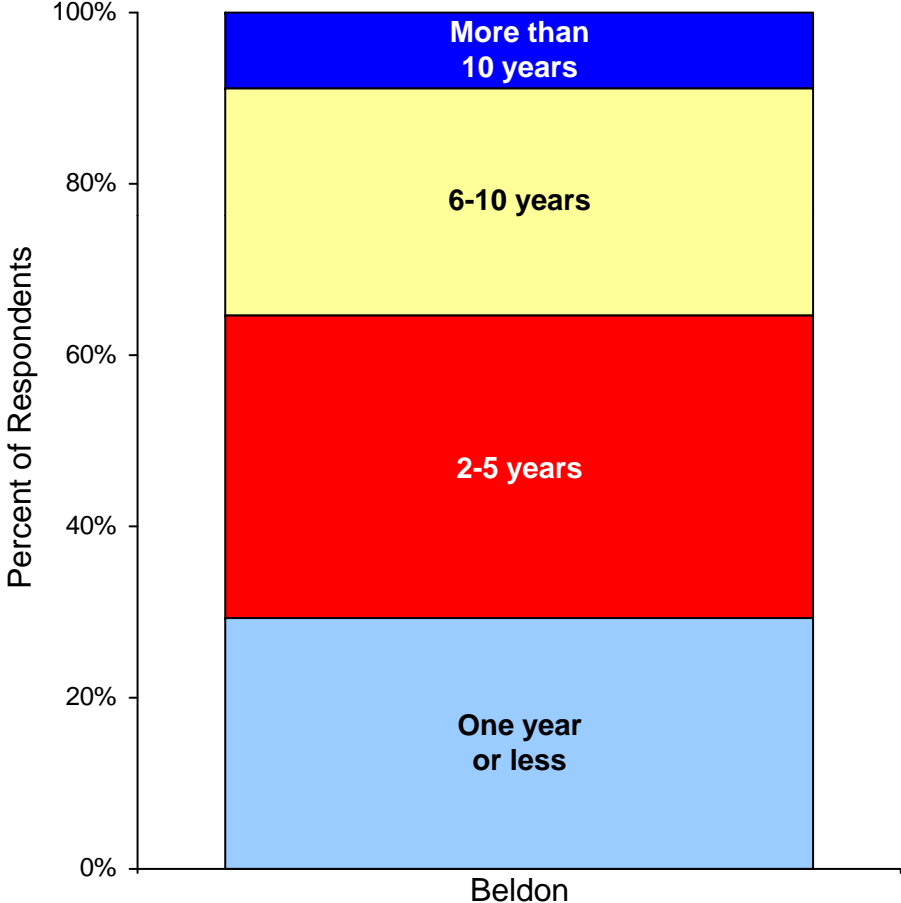
- lower than that of the median foundation



# History of Applicant Programs

More than half of Beldon declined applicants report having conducted the programs for which they were seeking funding for five years or less.

*Length of Time Which Applicants Have Regularly Conducted the Funded Programs*

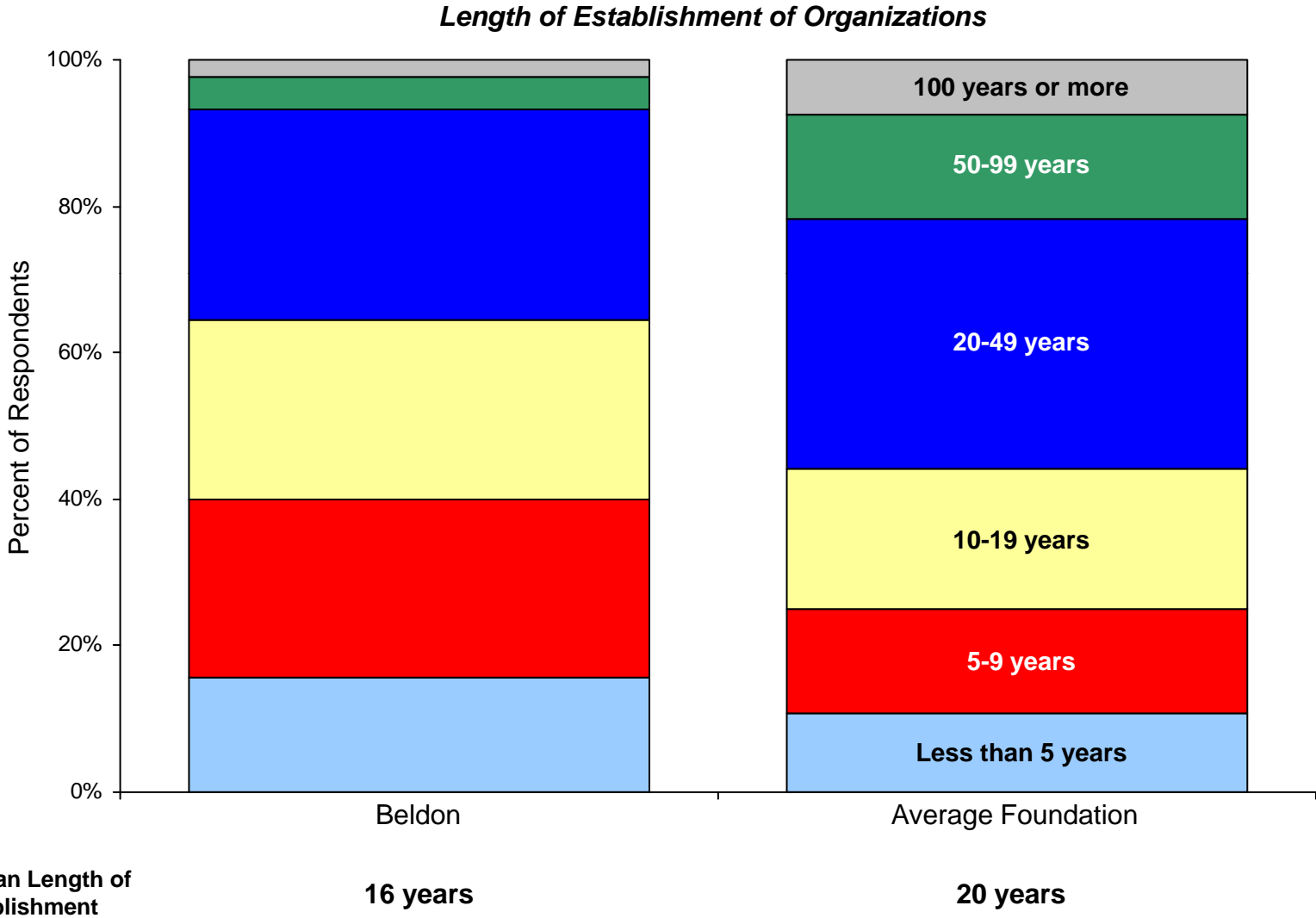


Note: Comparative data not available because of changes to the survey instrument.

# Length of Establishment of Organizations

At the median, the length of establishment of Beldon declined applicants' organizations is:

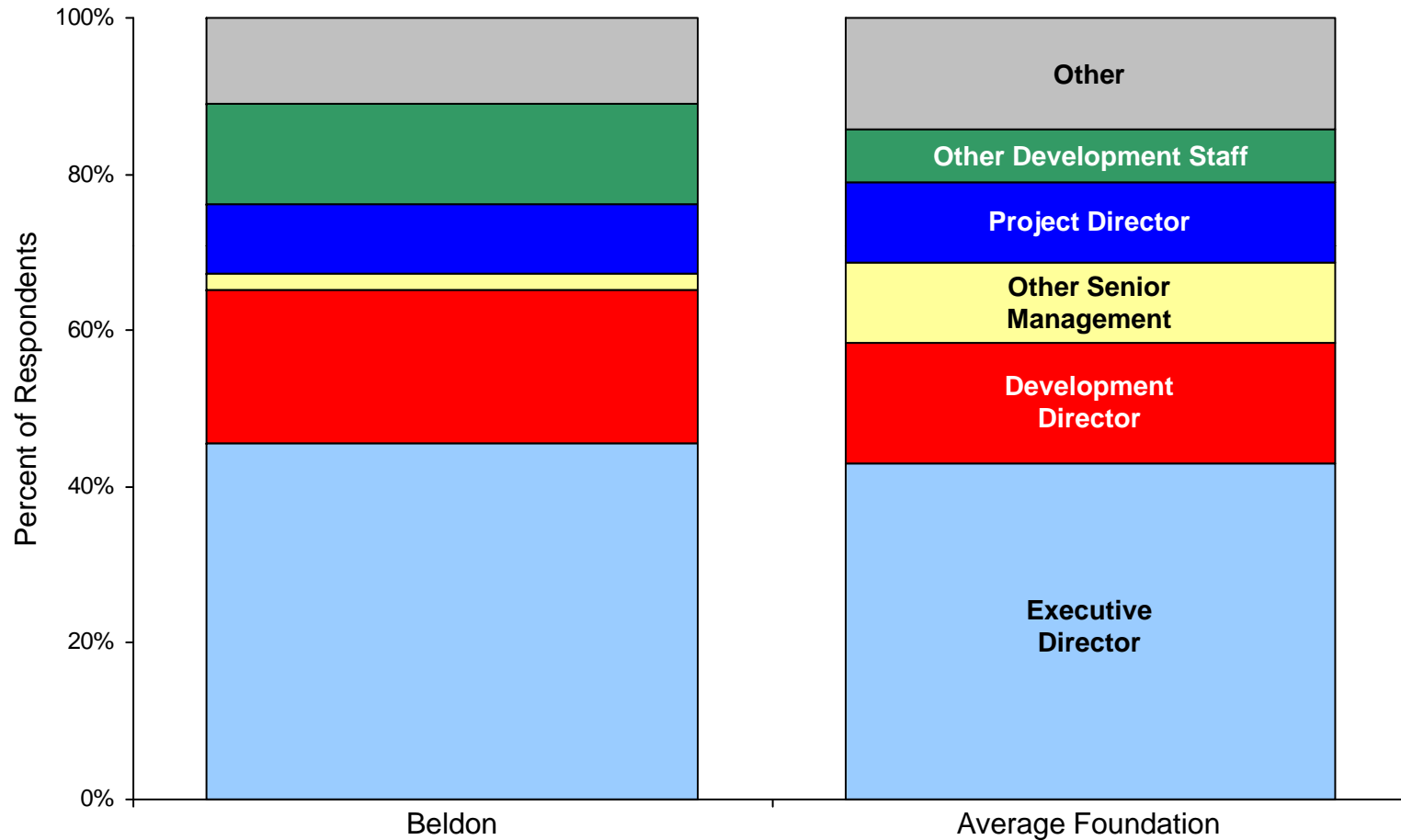
- shorter than that of the median foundation



Note: Chart includes data about 22 foundations.

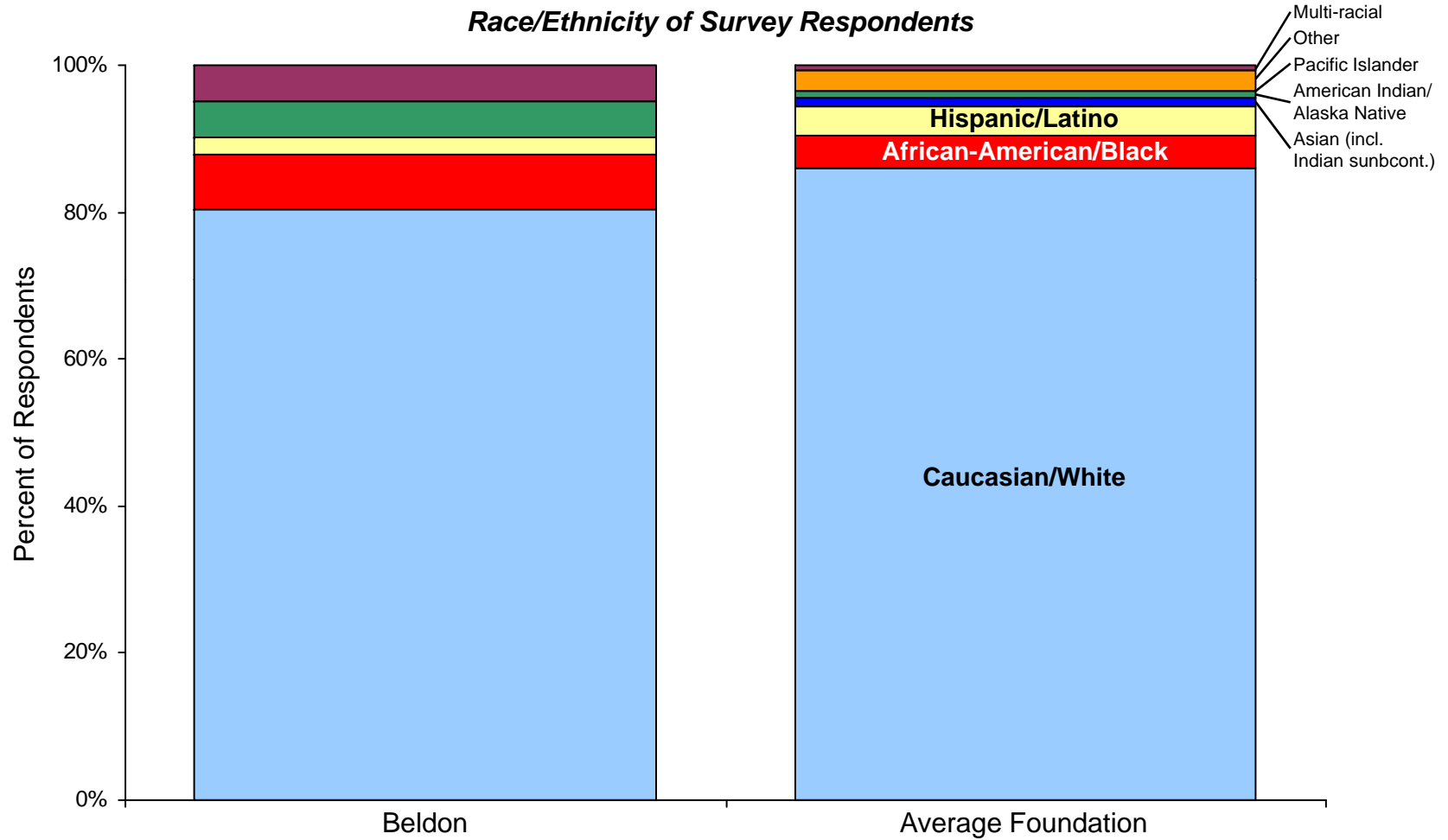
# Job Title of Respondents

Job Title of Survey Respondents



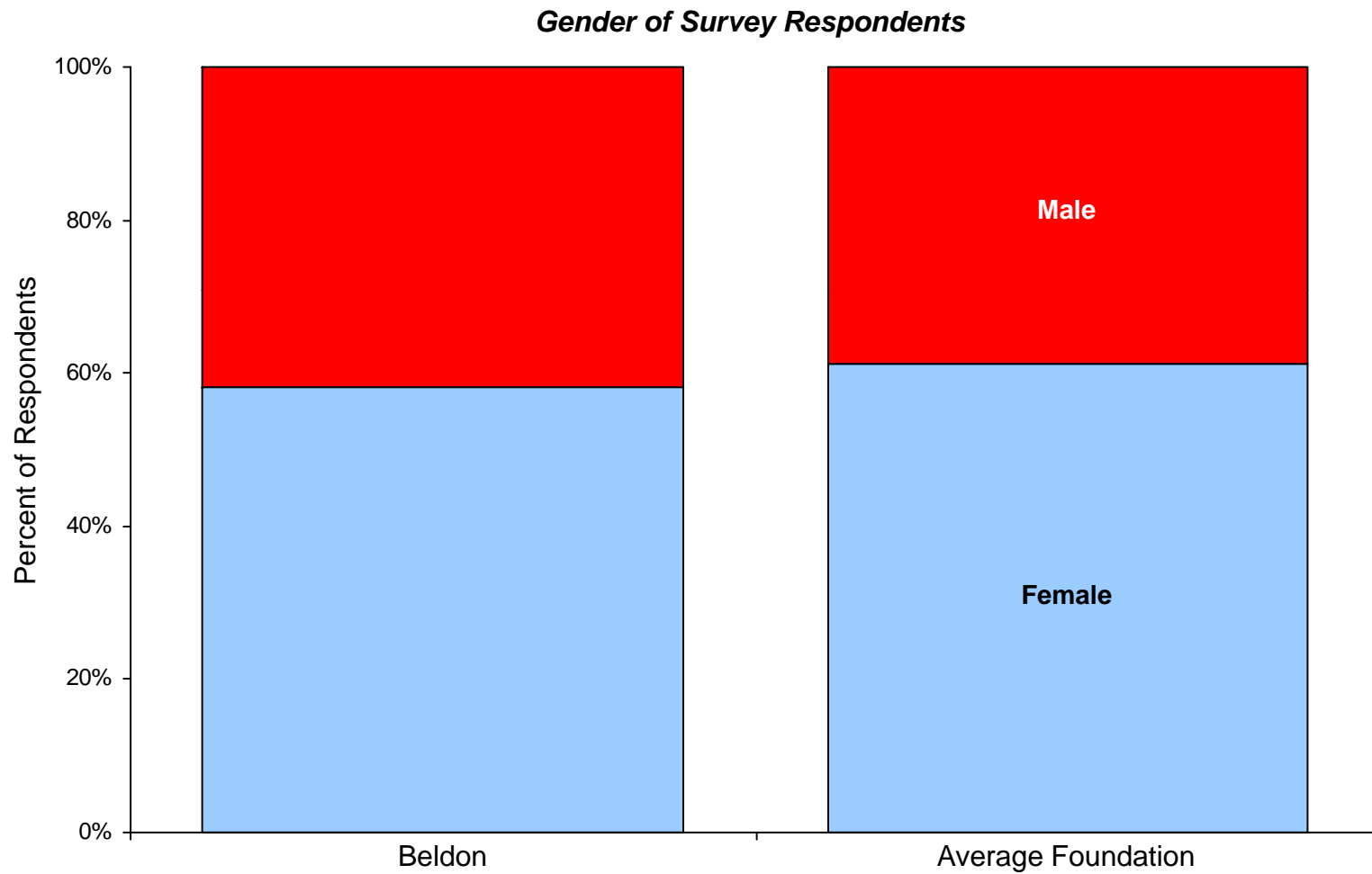


# Race/Ethnicity of Respondents



Note: Chart includes data about 10 foundations.

# Gender of Respondents



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# Foundations Included in Comparative Set

The 25 foundations whose declined applicant ratings are included in the comparative set of this Applicant Perception Report are:

The Assisi Foundation of Memphis  
Bill & Melinda Gates Foundation – Pacific Northwest Program  
Beldon Fund  
The California Endowment  
Community Foundation Silicon Valley  
Connecticut Health Foundation  
East Bay Community Foundation  
Endowment for Health  
Gaylord and Dorothy Donnelley Foundation  
The Harvest Foundation  
The Hyams Foundation  
John S. and James L. Knight Foundation  
Kresge Foundation  
Lucile Packard Foundation for Children’s Health  
Maine Health Access Foundation  
MetroWest Community Health Care Foundation  
New Hampshire Charitable Foundation  
New York State Health Foundation  
The Rhode Island Foundation  
Robert Wood Johnson Foundation  
Rockefeller Brothers Fund  
The Rockefeller Foundation  
Santa Barbara Foundation  
Vancouver Foundation  
The Virginia G. Piper Charitable Trust

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# About the Center for Effective Philanthropy (CEP)

## Mission

**To provide data and create insight so philanthropic funders can better define, assess, and improve their effectiveness and impact.**

## Vision

**We seek a world in which pressing social needs are more effectively addressed. We believe improved effectiveness of philanthropic funders can have a profoundly positive impact on nonprofit organizations and the people and communities they serve.**

# 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

blue  of california

Charles Stewart Mott Foundation

The David and Lucile Packard  
Foundation

THE  
Edna McConnell  
Clark FOUNDATION

the James Irvine foundation  
*Expanding Opportunity for the People of California*

Gordon and Betty  
**MOORE**  
FOUNDATION

KAUFFMAN  
Foundation

  
LUMINA®  
FOUNDATION FOR EDUCATION

MACARTHUR

  
marguerite casey foundation

Robert Wood Johnson Foundation 

 Rockefeller  
Brothers Fund  
Philanthropy for an Interdependent World

STUART FOUNDATION  
INVESTING IN CHILDREN & YOUTH

 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 Strategy**
- **Foundation Governance**
- **Foundation-Grantee Relationships**
- **Managing Operations**



# CEP Assessment Tools

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

- **Grantee Perception Report® (GPR):** provides CEOs, boards, and staff with comparative data on grantee perceptions of funder performance on a variety of dimensions
- **Applicant Perception Report (APR):** a companion to the GPR that provides comparative data from surveys of declined grant applicants
- **Comparative Board Report (CBR):** provides data on board structure and trustee perceptions of board effectiveness on a comparative basis
- **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
- **Stakeholder Assessment Report (STAR):** delivers insight about a funder's effectiveness by surveying stakeholders a funder seeks to influence as part of its strategy
- **Multidimensional Assessment Process (MAP):** provides an integrated assessment of performance, assimilating results and data from all of CEP's assessment tools into key findings, implications, and recommended action steps for greater effectiveness

# Contact Information

- ◆ This report was produced for the Beldon Fund by the Center for Effective Philanthropy in May 2008.
  
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