

CONFIDENTIAL

Grantee Perception Report®

prepared for the

Beldon Fund

Spring 2008

VERSION 05/30/08



THE CENTER FOR
EFFECTIVE PHILANTHROPY

675 Massachusetts Avenue ♦ Seventh Floor ♦ Cambridge, MA 02139
Tel: 617-492-0800 ♦ Fax: 617-492-0888 ♦ www.effectivephilanthropy.org

Contents

I.	Introduction	2
II.	External Orientation	
	a) Field-Focused Measures	7
	b) Community-Focused Measures	10
	c) Effectiveness in Creating Social Impact	12
III.	Impact on Grantee Organizations	14
IV.	Satisfaction	20
V.	Interactions	23
VI.	Communication	30
VII.	Assistance Beyond the Grant Check	
	a) Management and Field-Related Assistance	36
	b) Assistance Securing Funding from Other Sources	42
VIII.	Grant Processes and Administration	
	a) Selection Process	48
	b) Reporting and Evaluation Processes	54
	c) Dollar Return on Grantee Administrative Hours	57
IX.	Grantee Suggestions for the Foundation	62
X.	Review of Findings and Analysis and Discussion	65
	<u>Appendix</u>	
A.	Grantmaking/Grantee Characteristics	68
B.	Excerpt of Operational Benchmarking Report (OBR)	84
C.	List of Foundations in Dataset	91
D.	About the Center for Effective Philanthropy	94

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 broadly useful – forming the basis of research reports such as *Listening to Grantees: What Nonprofits Value in Their Foundation Funders* (2004), *Foundation Communications: The Grantee Perspective* (2006), and *In Search of Impact: Practices and Perceptions in Foundations' Provision of Program and Operating Grants to Nonprofits* (2006) – 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.**
 - Overall, assessing foundation performance is challenging and a range of data sources is required. The GPR provides one set of perspectives that can be particularly useful in understanding foundation performance
 - It is important to note that, on most questions, grantee ratings cluster toward the high end of an absolute scale.
 - Grantee perceptions must be interpreted in light of the unique strategy of the foundation.
 - The survey covers many areas in which grantees' perceptions might be useful 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

- ◆ The Center for Effective Philanthropy (CEP) has surveyed more than 50,000 grantees of 214 foundations since spring 2003. Please see the Appendix for a list of all foundations whose grantees CEP has surveyed.

- ◆ This Grantee Perception Report® (GPR) contains data collected over the last three years, and includes almost 17,000 grantee responses of 111 foundations.¹
 - CEP surveyed 91 fiscal year 2007 grantees of the Beldon Fund (“Beldon”) during February and March 2008. CEP received 77 completed responses, an 85 percent response rate.
 - The average and/or median rating for these respondents is shown throughout this report.
 - Grantees submitted responses via mail and the Web.²

- ◆ Beldon provided grantee contact information.

- ◆ Selected grantee comments are shown throughout this report. This selection of comments highlights major themes and reflects trends in the data. These selected comments over-represent negative comments about the Fund in order to offer foundation leadership a wide range of perspectives.

Key Findings

Across most dimensions on the grantee survey, Beldon Fund is rated highly by its grantees. The Fund is rated above 90 percent of foundations in the comparative set for its impact on grantees' fields, and for its understanding of and ability to advance knowledge in those fields. Grantees' ratings of the Fund's effect on public policy in their fields is the highest in the comparative set.

Grantees rate the Fund's impact on their organizations more positively than typical and ratings of its understanding of grantees' goals and strategies is above those of all other foundations. The impact of the Fund's funding on grantees' ability to sustain their work is rated as positively as the median foundation and over 75 percent of grantees indicated that after 2008 they will continue the work funded by the grant in the same form or slightly modified.

The quality of Beldon's interactions with its grantees – approachability if a problem arises, responsiveness of Fund staff, and fairness of treatment of grantees – is rated above the 75th percentile. Grantees are as satisfied with their experience with the Fund as grantees of the typical foundation.

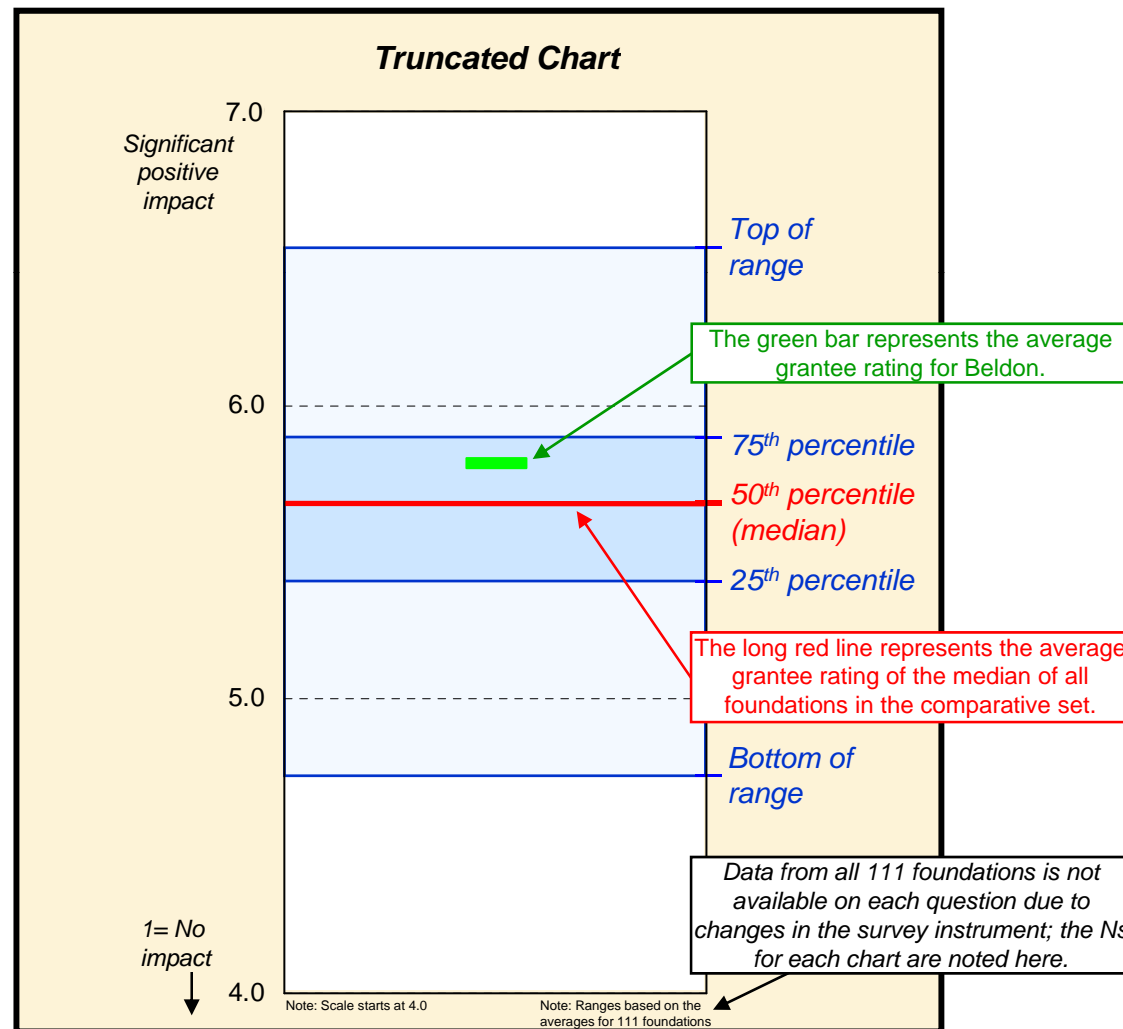
The clarity with which the Fund has communicated its goals and strategy is above the median foundation and in responses to open-ended comments, grantees indicate that the Foundation has been “very clear about the fact that they were spending down.”

The Fund has provided 62 percent of grantees with non-monetary assistance – a larger than typical proportion. Eighty-four percent report that the Fund provided assistance securing funding from other sources – the largest proportion among foundations in the comparative set – and the impact of these efforts is rated more positively than typical.

The helpfulness of the Fund's selection process in strengthening grantees organizations or the program funded by the grant is similar to that of the median foundation and the helpfulness of its evaluation process is rated less positively than typical. The Fund's selection and evaluation processes require as much time of grantees as typical, and Beldon's grants are larger in size than those of the median foundation. This results in a larger than typical number of grant dollars received by grantees for each hour spent on completing the Fund's administrative requirements.

Reading GPR Charts

Much of the grantee perception data in the GPR is presented in the format below. These graphs show the average of grantee responses for Beldon, over a background that shows percentiles for the average ratings for the full comparative set of 111 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 absolute range.**



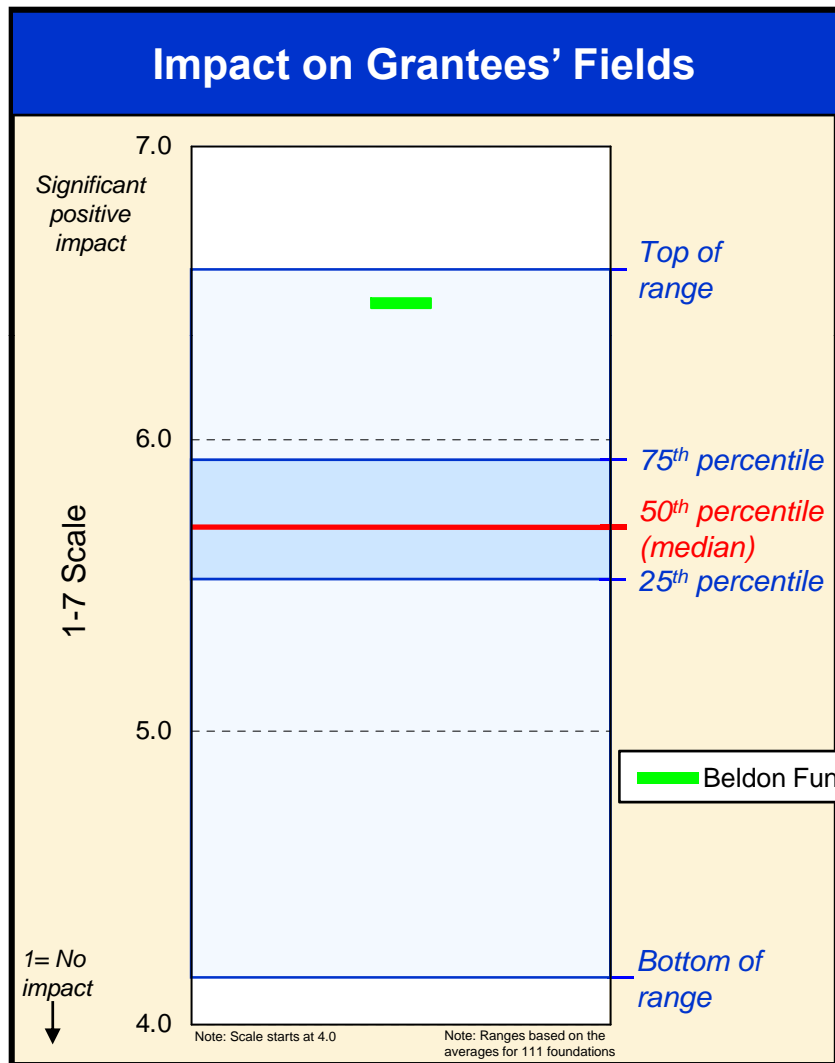
Contents

I.	Introduction	2
II.	External Orientation	
	a) Field-Focused Measures	7
	b) Community-Focused Measures	10
	c) Effectiveness in Creating Social Impact	12
III.	Impact on Grantee Organizations	14
IV.	Satisfaction	20
V.	Interactions	23
VI.	Communication	30
VII.	Assistance Beyond the Grant Check	
	a) Management and Field-Related Assistance	36
	b) Assistance Securing Funding from Other Sources	42
VIII.	Grant Processes and Administration	
	a) Selection Process	48
	b) Reporting and Evaluation Processes	54
	c) Dollar Return on Grantee Administrative Hours	57
IX.	Grantee Suggestions for the Foundation	62
X.	Review of Findings and Analysis and Discussion	65
	<u>Appendix</u>	
A.	Grantmaking/Grantee Characteristics	68
B.	Excerpt of Operational Benchmarking Report (OBR)	84
C.	List of Foundations in Dataset	91
D.	About the Center for Effective Philanthropy	94

Impact on Grantees' Fields

On impact on grantees' fields, Beldon is rated:

- higher than ninety percent of surveyed foundations

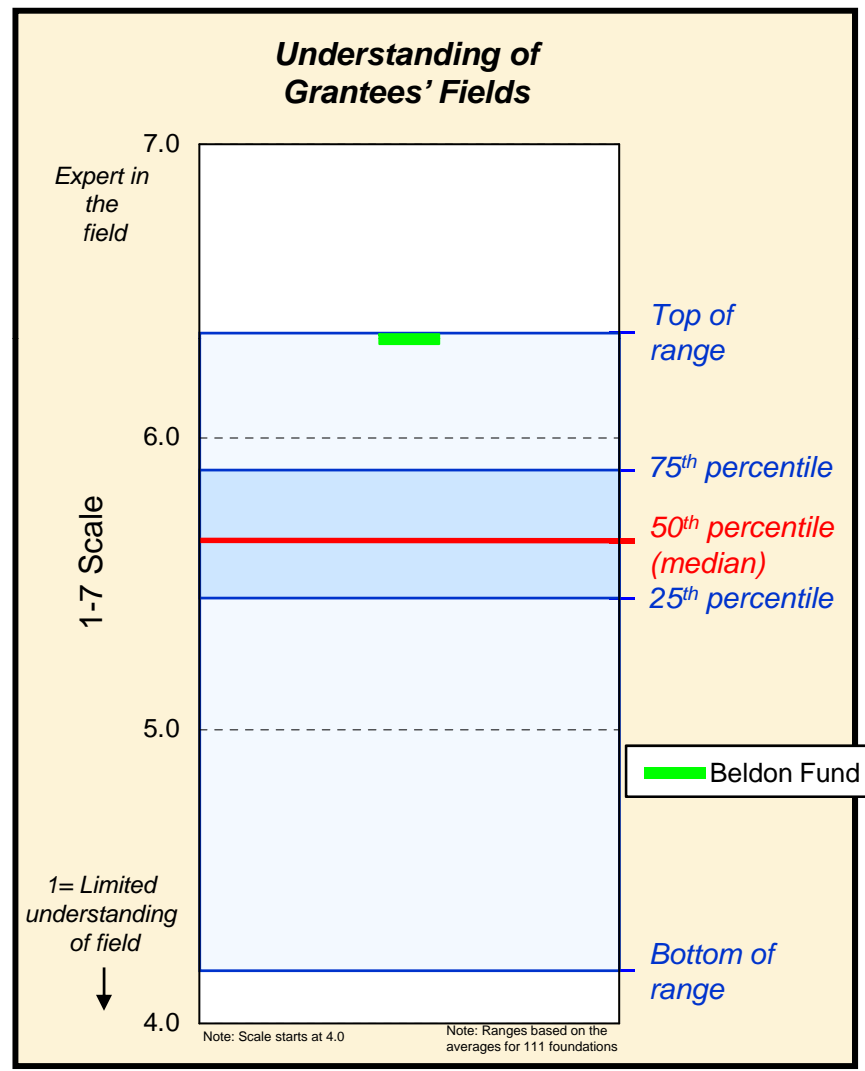


Selected Grantee Comments

- ◆ *“They are the absolute top innovator when it comes to forging collaborative relationship in the ... field. They have no equal and have totally changed the field to be one where collaboration is expected, not just hoped for.”*
- ◆ *“Beldon has mattered enormously in building the environmental health movement and in encouraging true collaboration.”*
- ◆ *“The foundation’s strategy to focus on key states has been very helpful in our efforts to pass public health protective policies. If there is a national policy it must come from the states up and the foundation staff get this! And they helped others in the foundation world get it.”*
- ◆ *“By seeing the big picture and fostering collaboration on market and policy campaigning, Beldon has had a major influence on shaping public policy (or the strategy behind it).”*

Understanding of Grantees' Fields

- On understanding of grantees' fields, Beldon is rated:
- higher than ninety percent of surveyed foundations



Note: This question includes a "don't know" response option; 9 percent of Beldon respondents answered "don't know," compared to 7 percent at the median foundation.

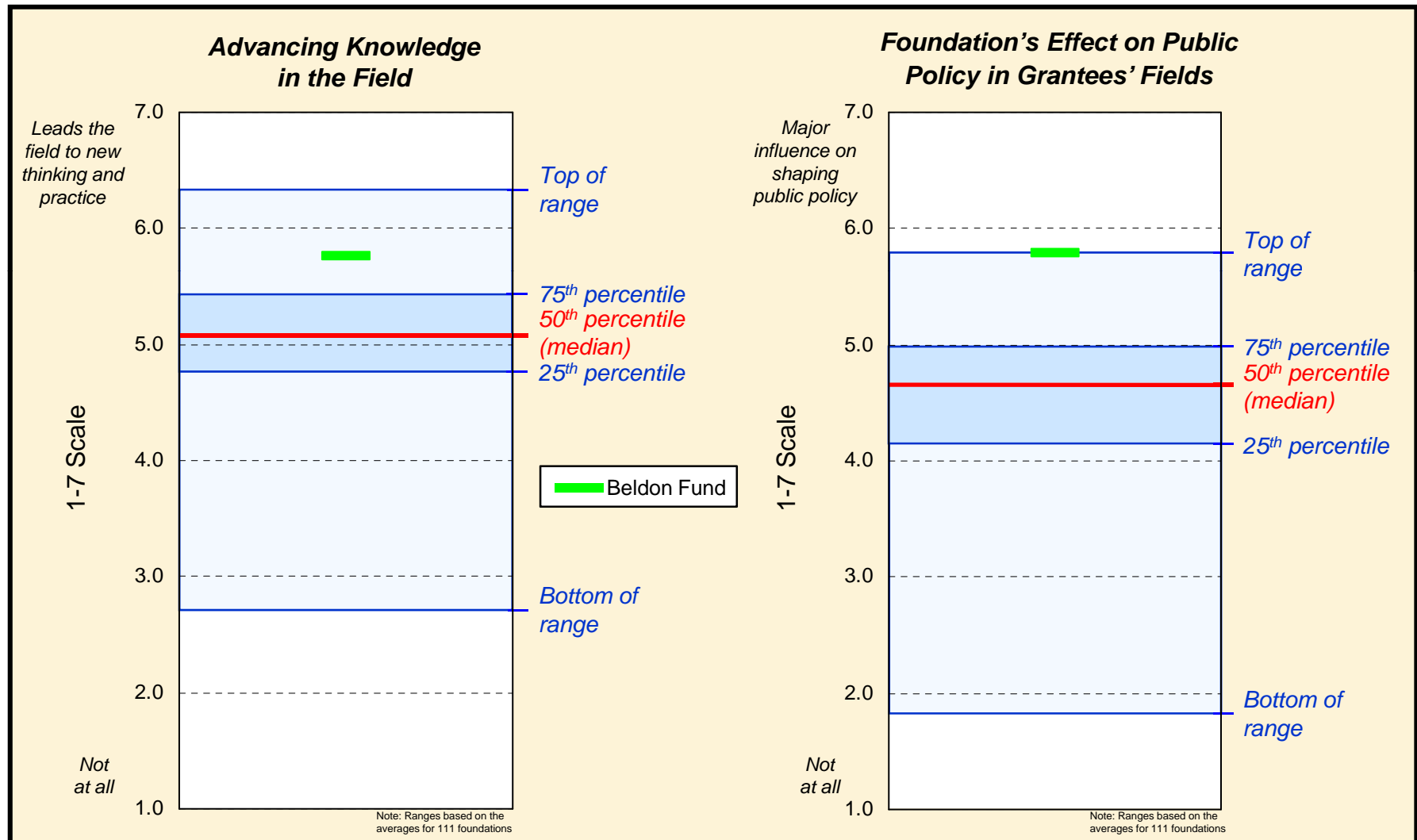
Advancing Knowledge in Fields and Effect on Public Policy

On advancement of knowledge in grantees' fields, Beldon is rated:

- higher than ninety percent of surveyed foundations

On effect on public policy in grantees' fields, Beldon is rated:

- higher than all other surveyed foundations

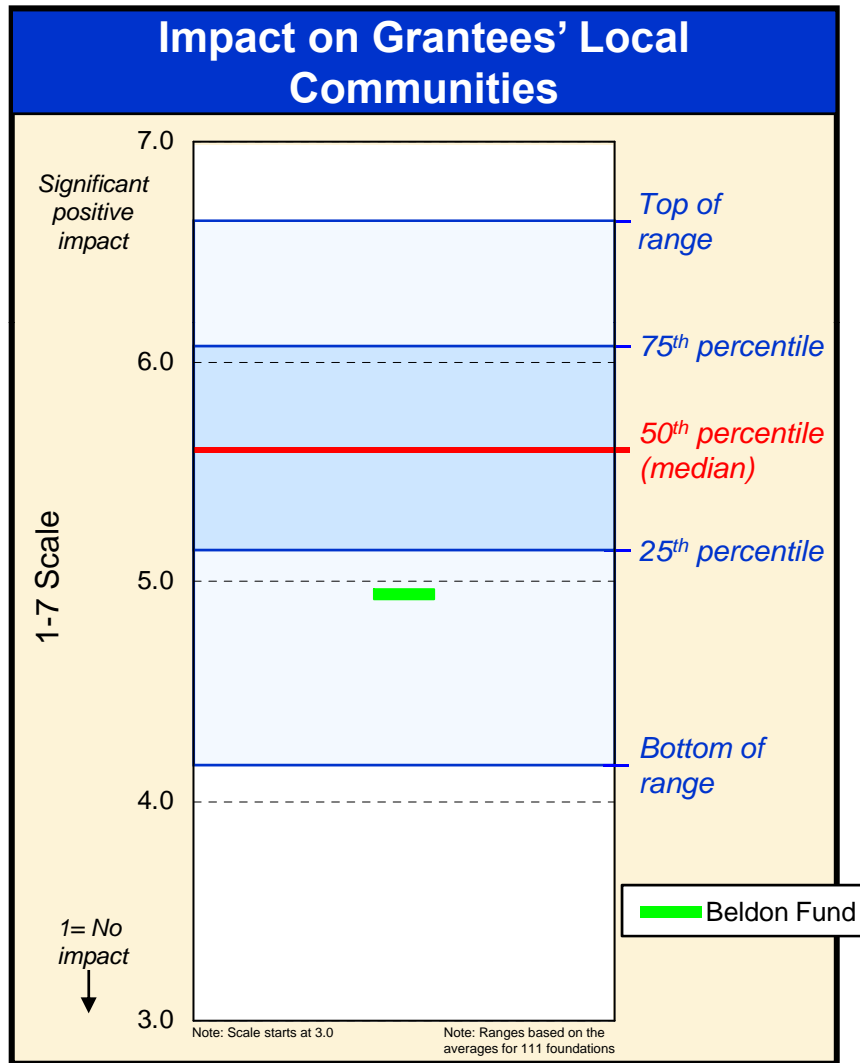


Note: The questions depicted on these charts include a "don't know" response option. In the left-hand chart, 12 percent of Beldon respondents answered "don't know," compared to 23 percent at the median foundation. In the right-hand chart 24 percent of Beldon respondents answered "don't know," compared to 37 percent at the median foundation.

Impact on Grantees' Local Communities

On impact on grantees' local communities, Beldon is rated:

- below the median foundation



Selected Grantee Comments

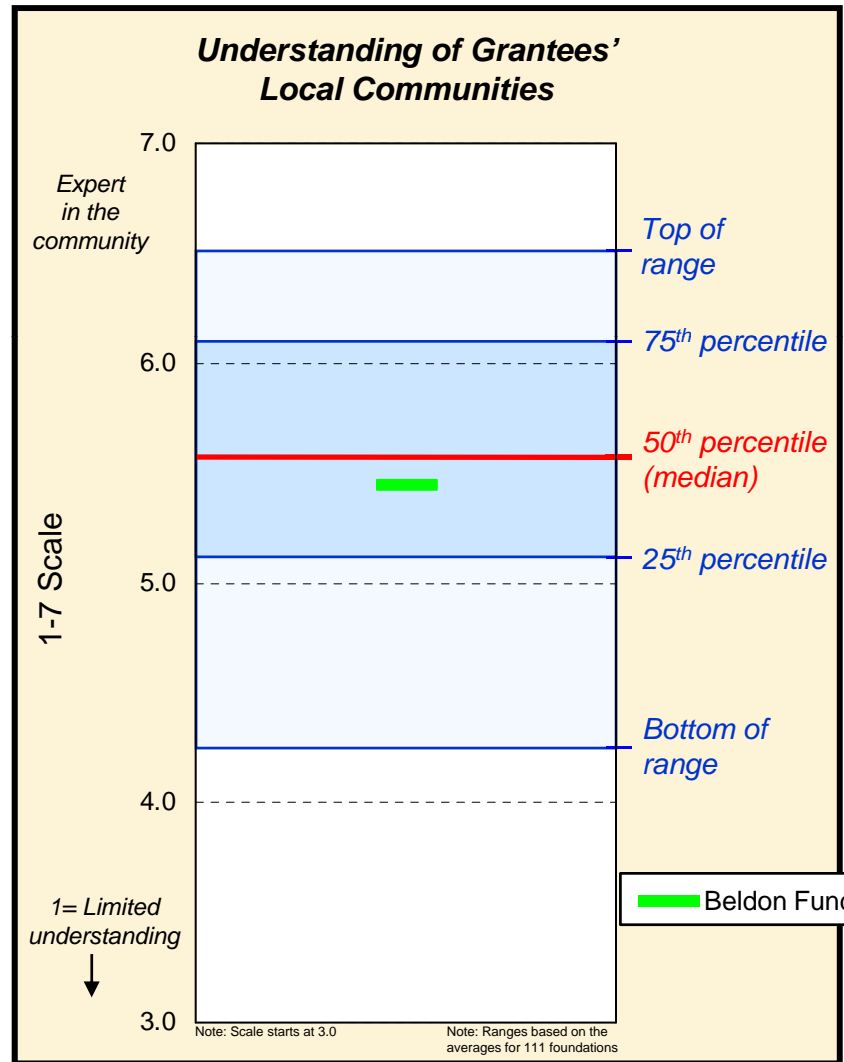
- ♦ “Beldon has built a cohort in our state of organizations that advance policy advocacy and nonpartisan electoral work. Their grants and assistance have resulted in long-term capacity building in the sector.”
- ♦ “The Beldon Fund has significantly advanced ... progress on issues of environmental health in local communities. They have been a very important leader in working to protect communities from the harms that toxics can create.”
- ♦ “[The Fund] has made a difference in helping the NC conservation community become more effective and strategic.”

Note: This question includes a “don’t know” response option; 36 percent of Beldon respondents answered “don’t know,” compared to 11 percent at the median foundation.

Understanding of Grantees' Local Communities

On understanding of grantees' local communities, Beldon is rated:

- similarly to the median foundation

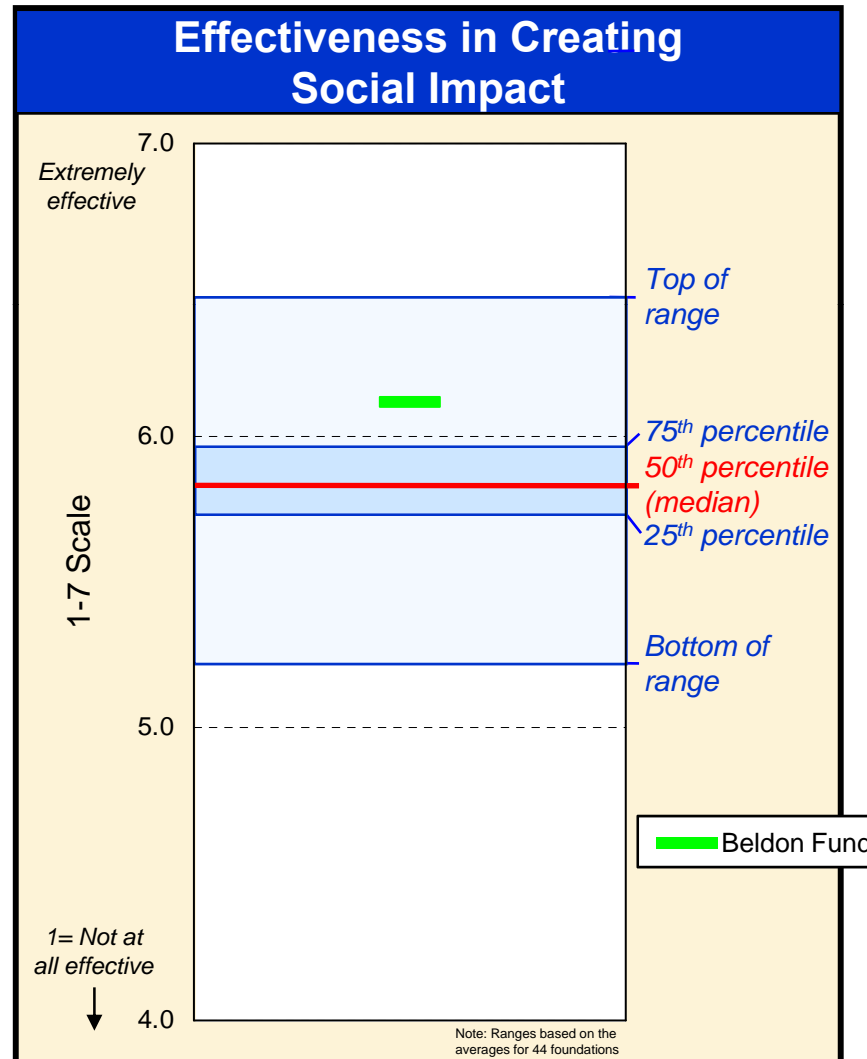


Note: This question includes a "don't know" response option; 43 percent of Beldon respondents answered "don't know," compared to 14 percent at the median foundation.

Effectiveness in Creating Social Impact

On effectiveness in creating social impact, Beldon is rated:

- above the median foundation



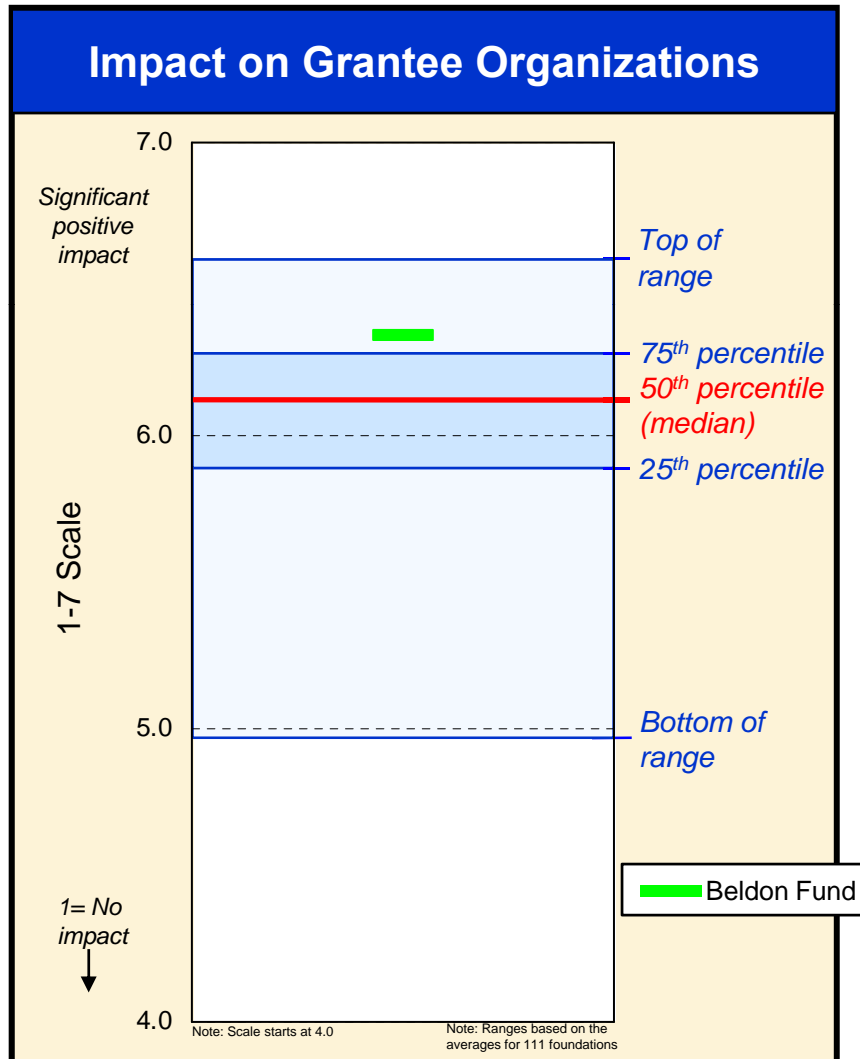
Contents

I.	Introduction	2
II.	External Orientation	
	a) Field-Focused Measures	7
	b) Community-Focused Measures	10
	c) Effectiveness in Creating Social Impact	12
III.	Impact on Grantee Organizations	14
IV.	Satisfaction	20
V.	Interactions	23
VI.	Communication	30
VII.	Assistance Beyond the Grant Check	
	a) Management and Field-Related Assistance	36
	b) Assistance Securing Funding from Other Sources	42
VIII.	Grant Processes and Administration	
	a) Selection Process	48
	b) Reporting and Evaluation Processes	54
	c) Dollar Return on Grantee Administrative Hours	57
IX.	Grantee Suggestions for the Foundation	62
X.	Review of Findings and Analysis and Discussion	65
	<u>Appendix</u>	
A.	Grantmaking/Grantee Characteristics	68
B.	Excerpt of Operational Benchmarking Report (OBR)	84
C.	List of Foundations in Dataset	91
D.	About the Center for Effective Philanthropy	94

Impact on Grantee Organizations

On impact on grantee organizations, Beldon is rated:

- above the median foundation



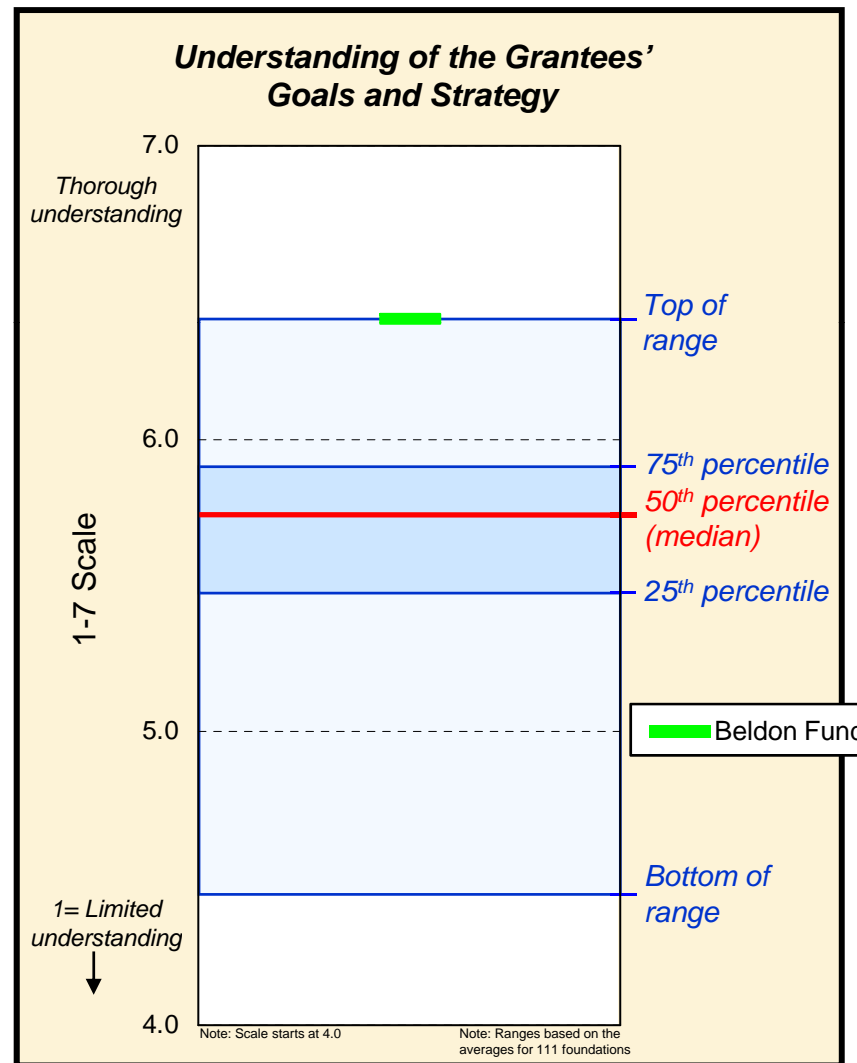
Selected Grantee Comments

- ♦ “Beldon Fund has had a tremendous impact on our organization. Their support has given us the credibility to develop and demonstrate new collaborative approaches that would not have been done without their support. These approaches have resulted in significant real-world progress on the issues that drive our mission.”
- ♦ “Beldon Fund had a profound impact on our ability to expand and grow – through direct funding, excellent trainings, and peer-to-peer meetings.”
- ♦ “The consistent support and multi-year support meant a level of stability. The general support meant flexibility.”
- ♦ “It made the difference. We couldn’t have done it otherwise and would be in a tough position heading into the future. But due to the Beldon Fund’s support, we are ready to charge into the future and are well positioned for future success.”
- ♦ “The program officer was an outstanding resource for conceptualizing our organization’s place in the scheme of environmental change organizations.”
- ♦ “A very good balance between staying informed about progress in the grant without ‘micromanaging’ the grantee!”

Understanding of Grantees' Goals and Strategy

On understanding of grantees' goals and strategies, Beldon is rated:

- higher than all other surveyed foundations

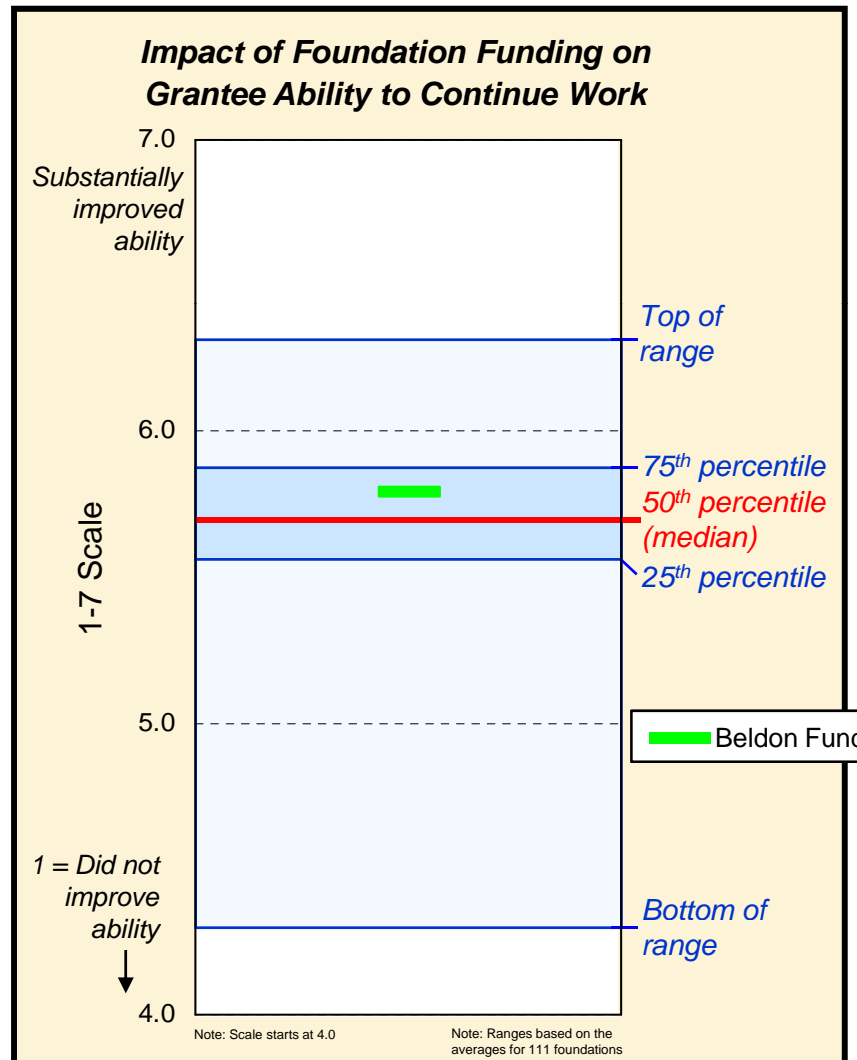


Note: This question includes a "don't know" response option; 8 percent of Beldon respondents answered "don't know," compared to 8 percent at the median foundation.

Impact on Sustainability of Funded Work

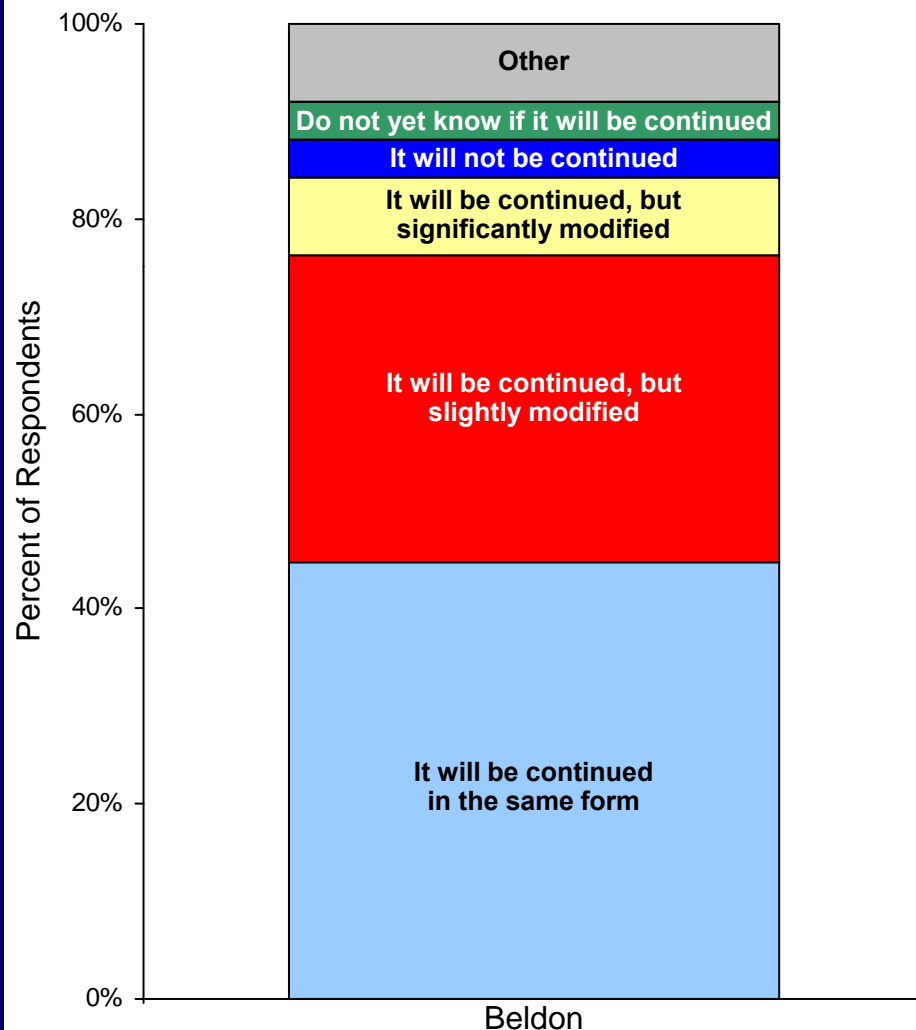
On the effect of the Fund's funding on grantees' ability to sustain their work in the future, Beldon is rated:

- similarly to the median foundation



Continuation of Work Funded by Beldon

Beldon grantees were asked to indicate how their organization is planning to continue the work funded by the Fund’s grant, if at all, after 2008. Forty-five percent of grantees indicated that their work will be continued in the same form. Grantees were also asked to describe how Beldon helped their organization plan for sustainability or if there were opportunities that were missed. A selection of these comments is below.



Selected Grantee Comments

- ♦ *“They gave us ample warning of the spend down. They gave us extra monies to spend on fundraising capacity as part of the planning for the transition. They did everything they could within reason on this front.”*
- ♦ *“They were very helpful with introductions to new donors, however they did push a little late for strategies to develop a small donor base, which would clearly help make the work more sustainable.”*
- ♦ *“Program staff at the Beldon Fund ... were especially supportive and engaged to help us find opportunities to sustain the work after Beldon funding. Both also encouraged us to plan and made the future possibilities very clear.”*
- ♦ *“Beldon Fund asked us what our plan for continued funding was, but didn’t provide technical support or assistance to find new sources of funding which would have been most useful.”*
- ♦ *“[Our program officer] has been phenomenal in her support of our work. She held us accountable for finding matching funds and has arranged calls and meetings with foundations who she believes would be interested in sustaining our work.”*
- ♦ *“We participated in the intensive fundraising training program, which was helpful. It also is helpful that they spent time working to expand the broader foundation community’s understanding of and support for more advocacy based work.”*

Other Comments About Beldon's Spend Down

Beldon grantees were asked to provide any additional comments that relate to Beldon's spend down of its grantmaking assets. A selection of these comments are below.

"Please add any additional comments that relate to Beldon's spend down of its grantmaking assets."

- ◆ *"There is great value in making the decision and sharing it widely that the assets would be spent on intended purposes within an established timeline. Clear expectations are good and have served the foundation and grantees well."*
- ◆ *"There are great stories to tell other funders about the Beldon Fund experience. Ideally we can capture the best stories, package them and get them out to folks. In particular I'm thinking about the Fundraising Program, Peer-to-Peer gatherings, and supporting state tables."*
- ◆ *"Of course because of the unique nature of their support – especially its size and the fact that it evolved into general support – we wish they weren't leaving."*
- ◆ *"They did an excellent job at saving the environment by funding our organization's work and they did a very effective job at communicating with us."*
- ◆ *"I think it was really smart that Beldon Fund made its last two years of funding available in one final grant. This action will make it easier for us to find replacement funding without feeling as desperate as we might have otherwise. I also very much support Beldon's decision to spend down its assets and think more foundations should follow its lead. It's the right and responsible thing to do! Foundations hold onto their money more tightly than they should and, definitely, for too long! Bigger, multi-year grants are most useful to non-profit organizations."*
- ◆ *"Personally, I think it was the wrong decision. The left could have used a small permanent source of funds; this is how the right has succeeded."*
- ◆ *The Beldon Fund will be missed. There are few risk-taking funders willing to give core support for advocacy, right-to-know, and environmental policy work."*
- ◆ *"Although challenging for us organizationally, it's a respectable strategy to pursue."*

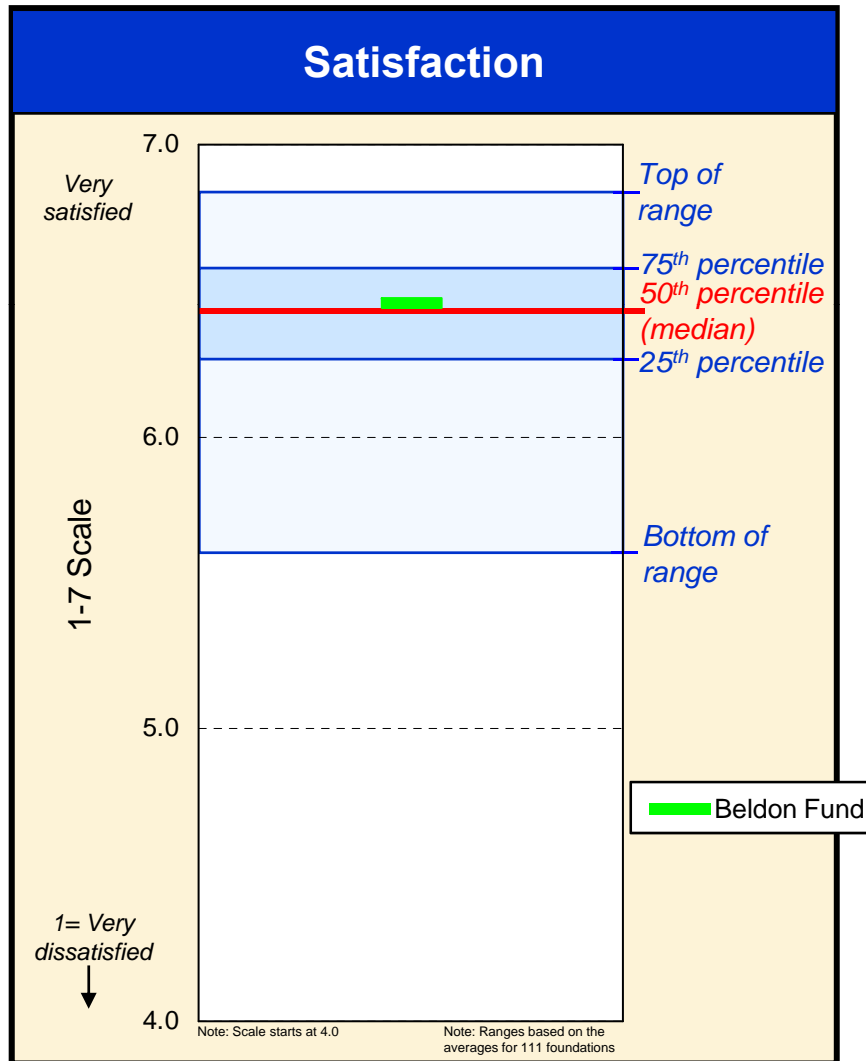
Contents

I.	Introduction	2
II.	External Orientation	
	a) Field-Focused Measures	7
	b) Community-Focused Measures	10
	c) Effectiveness in Creating Social Impact	12
III.	Impact on Grantee Organizations	14
IV.	Satisfaction	20
V.	Interactions	23
VI.	Communication	30
VII.	Assistance Beyond the Grant Check	
	a) Management and Field-Related Assistance	36
	b) Assistance Securing Funding from Other Sources	42
VIII.	Grant Processes and Administration	
	a) Selection Process	48
	b) Reporting and Evaluation Processes	54
	c) Dollar Return on Grantee Administrative Hours	57
IX.	Grantee Suggestions for the Foundation	62
X.	Review of Findings and Analysis and Discussion	65
 <u>Appendix</u>		
A.	Grantmaking/Grantee Characteristics	68
B.	Excerpt of Operational Benchmarking Report (OBR)	84
C.	List of Foundations in Dataset	91
D.	About the Center for Effective Philanthropy	94

Satisfaction

On overall satisfaction, a measure on which grantees at all foundations rate positively on an absolute scale, Beldon is also rated positively and:

- similarly to the median foundation



Selected Grantee Comments

- ◆ “[Beldon is] one of our most involved and thoughtful funders providing financial support, but also excellent suggestions for program work, funding strategies, support through major personnel shifts – truly helpful. We felt our program officer was almost on staff – we felt comfortable discussing pretty much anything.”
- ◆ “By far among the most helpful, civil, supportive, interested, and approachable foundations. Their assistance in remembering grant-related deadlines shows an appreciation of the busy lives and important roles of their grantees. They act like partners instead of judges, which makes the work much better.”
- ◆ “Honestly, it is the best foundation I have ever worked with in more than 20 years of doing advocacy work. Really knowledgeable, very supportive, [and a] great partner.”

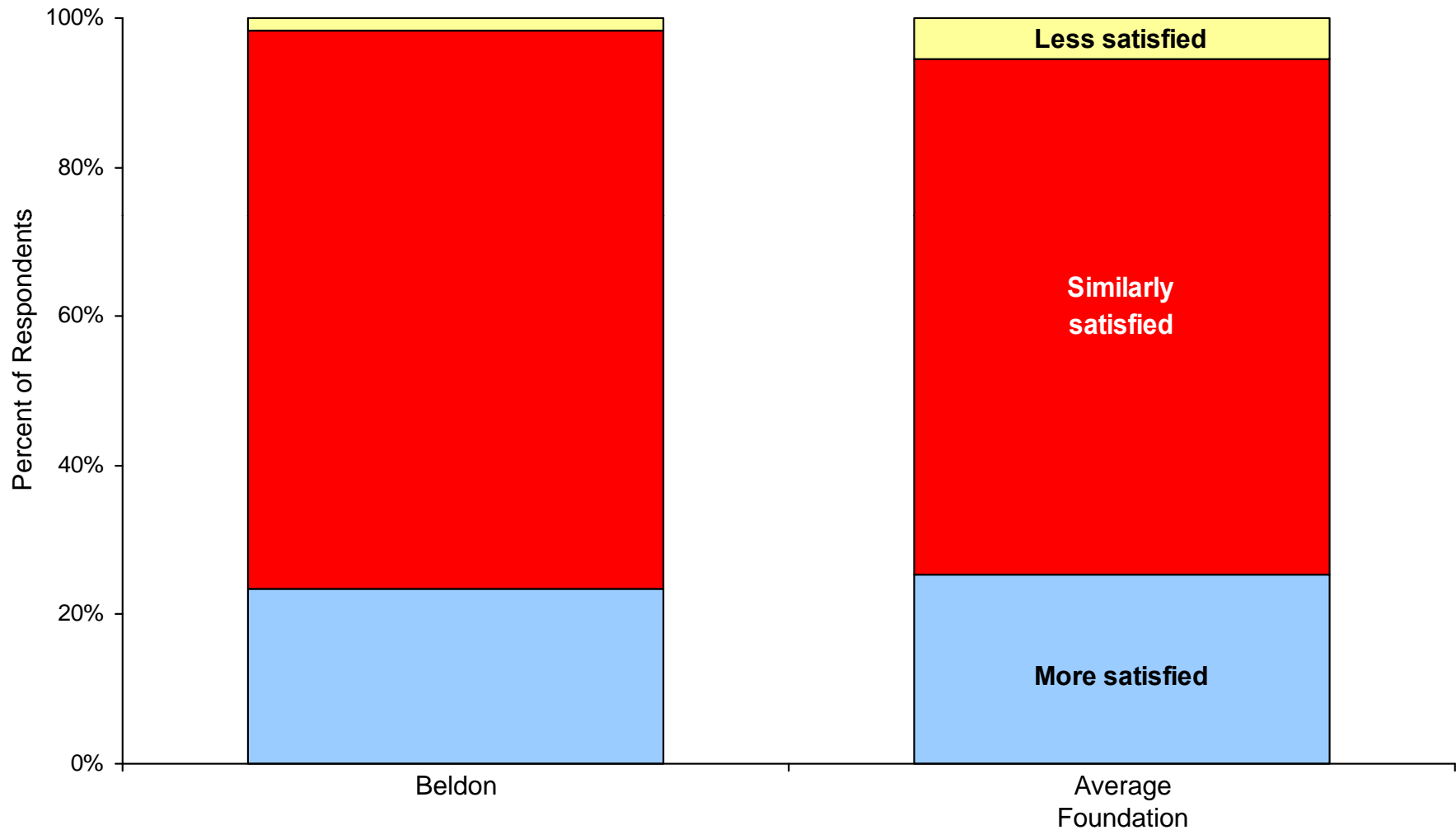
Survey-Wide Analysis Fact: Three dimensions best predict grantee perceptions of satisfaction with their foundation funders: 1) *Quality of Interactions with Foundation Staff:* fairness, responsiveness, approachability; 2) *Clarity of Communication of a Foundation’s Goals and Strategy:* clear and consistent 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 proportion of Beldon grantees that are more satisfied this year with the Fund than they were last year is:

- similar to that of the average foundation

Change in Satisfaction with the Foundation from Last Year



Note: Question asked of grantees that were receiving funding from the foundation last year as well as this year. This chart includes data about 111 foundations.

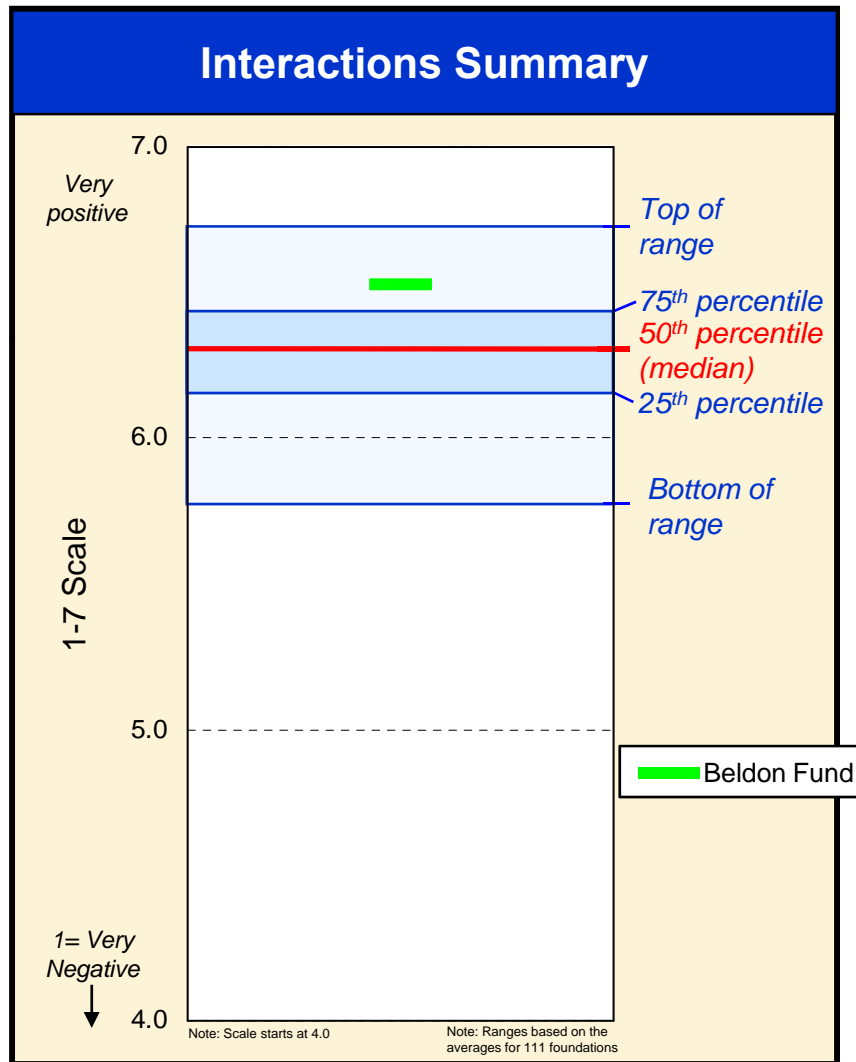
Contents

I.	Introduction	2
II.	External Orientation	
	a) Field-Focused Measures	7
	b) Community-Focused Measures	10
	c) Effectiveness in Creating Social Impact	12
III.	Impact on Grantee Organizations	14
IV.	Satisfaction	20
V.	Interactions	23
VI.	Communication	30
VII.	Assistance Beyond the Grant Check	
	a) Management and Field-Related Assistance	36
	b) Assistance Securing Funding from Other Sources	42
VIII.	Grant Processes and Administration	
	a) Selection Process	48
	b) Reporting and Evaluation Processes	54
	c) Dollar Return on Grantee Administrative Hours	57
IX.	Grantee Suggestions for the Foundation	62
X.	Review of Findings and Analysis and Discussion	65
 <u>Appendix</u>		
A.	Grantmaking/Grantee Characteristics	68
B.	Excerpt of Operational Benchmarking Report (OBR)	84
C.	List of Foundations in Dataset	91
D.	About the Center for Effective Philanthropy	94

Grantee Interactions Summary

On this summary that includes grantees' comfort approaching the Fund if a problem arises, responsiveness of Fund staff, and fairness of the Fund's treatment of grantees Beldon is rated:

- above the median foundation



Selected Grantee Comments

- ♦ “The interactions that I had with [Beldon’s staff] were extremely helpful, professional, and insightful. The staff quickly responded to all requests, provided helpful feedback and suggestions and kept me in the loop for upcoming needs/decisions.”
- ♦ “In every aspect, I feel I was treated with respect and understanding and provided with any and all guidance I needed. My experience with [my program officer] has assisted me in all other foundation requests I have developed.”
- ♦ “I always found the staff no matter what level of the structure to be very welcoming and helpful. I never left feeling that there was a hidden message or I was unclear about their programs and if my organization fit within their priorities.”
- ♦ “Interaction with foundation officials was always respectful and helpful. We had no trouble accessing foundation officials – they were always a huge help throughout the grant writing and reporting process.”

Note: Index created by averaging grantee ratings of comfort approaching the foundation if a problem arises, responsiveness of the foundation staff, and fairness of the foundation's treatment of grantees – ratings that are highly correlated.

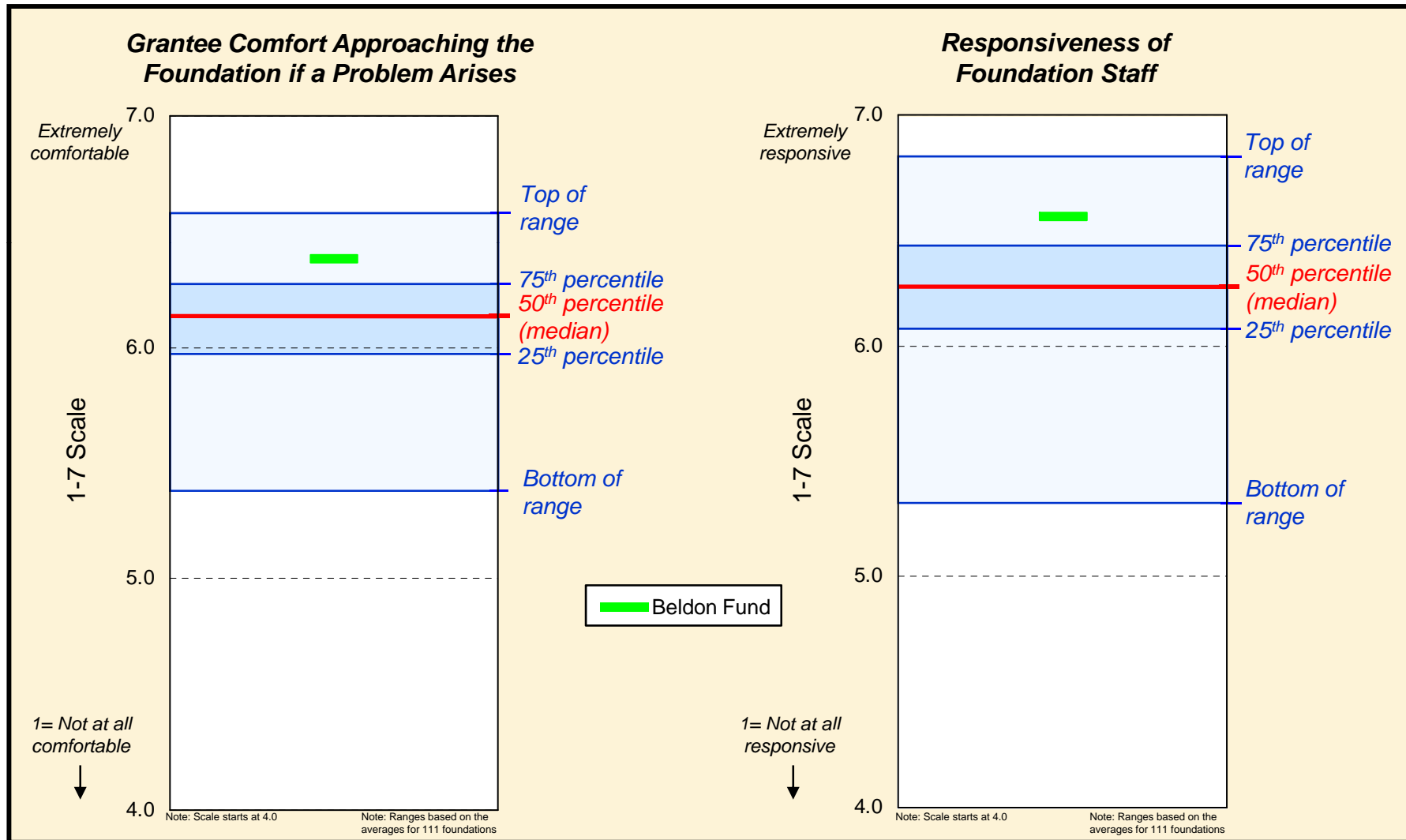
Interactions Measures (1)

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

- higher than ninety percent of surveyed foundations

On responsiveness of Fund staff to grantees, Beldon is rated:

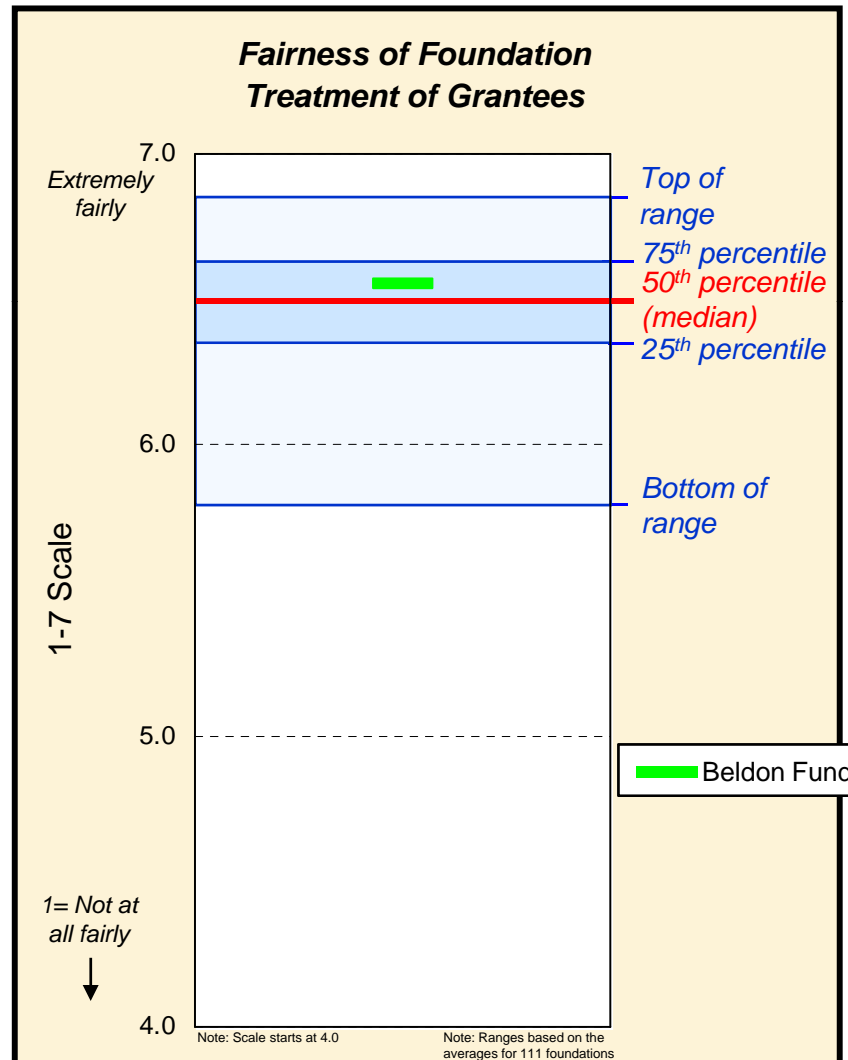
- above the median foundation



Interactions Measures (2)

On fairness of treatment of grantees, a measure on which grantees at all foundations rate positively on an absolute scale, Beldon is also rated positively and:

- similarly to the median foundation

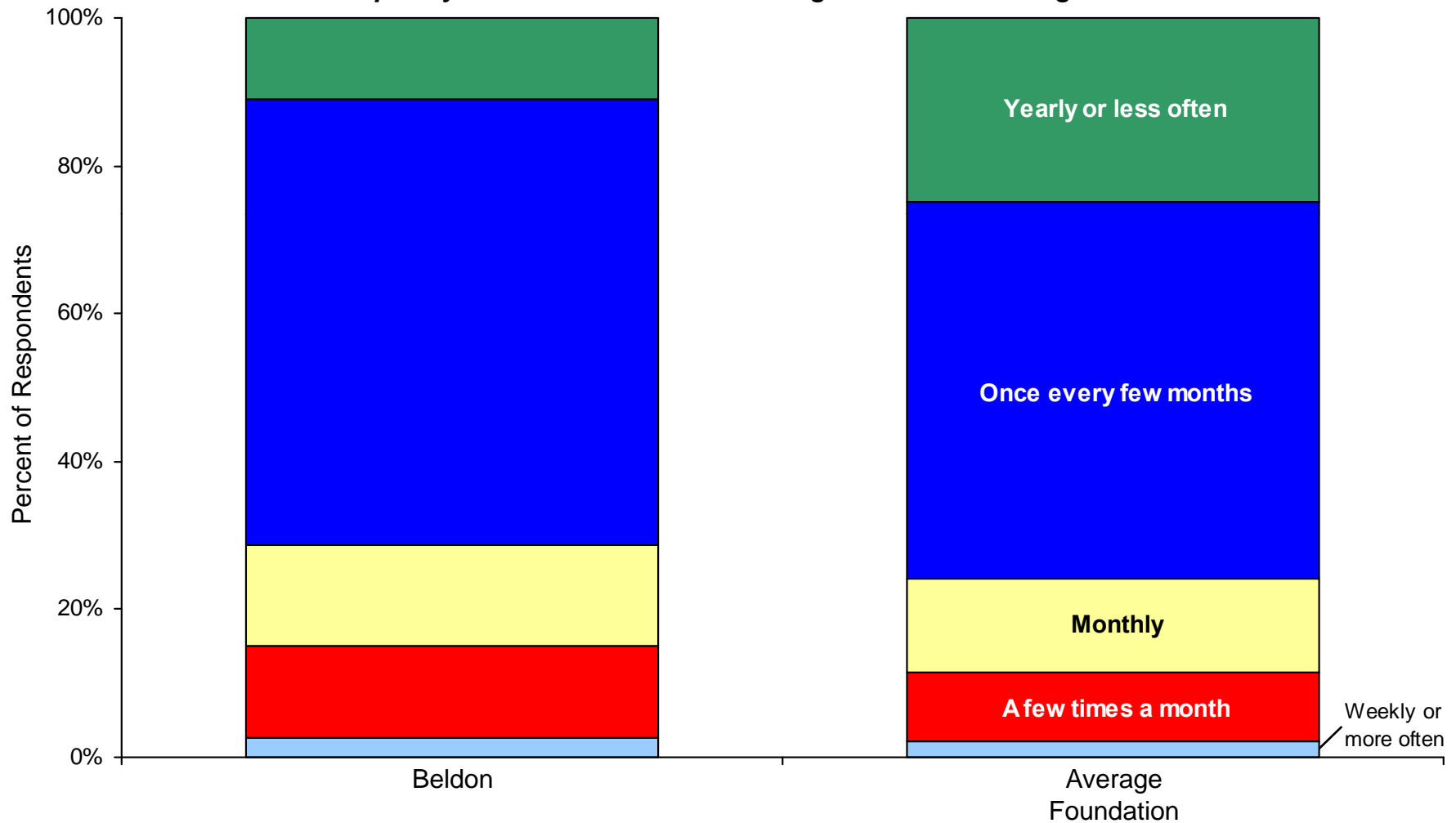


Frequency of Interactions

The proportion of Beldon grantees that report interacting with their program officers once every few months or more frequently is:

- larger than that of the average foundation

Frequency of Grantee Contact with Program Officers During Grant

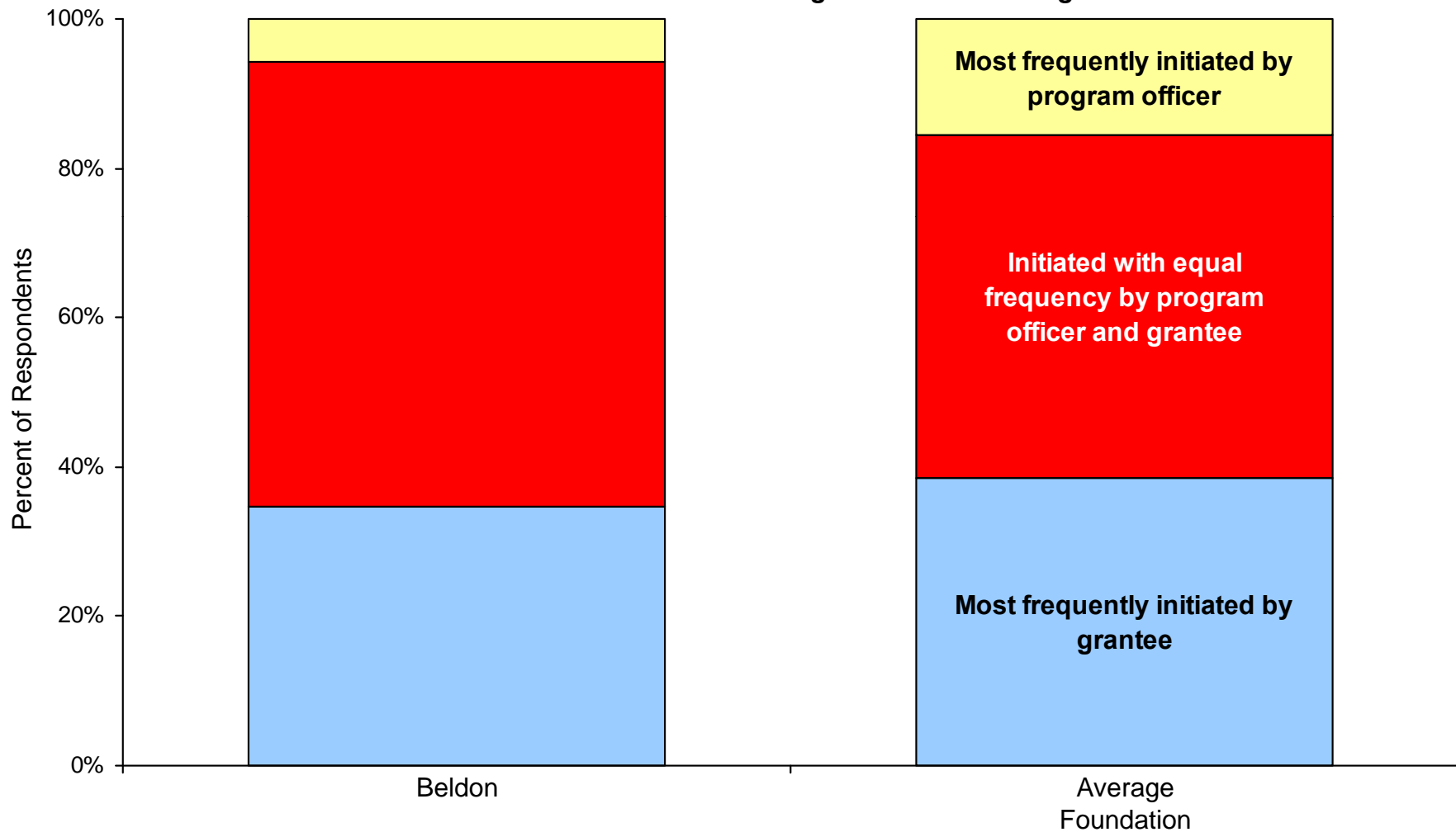


Initiation of Interactions

The proportion of Beldon grantees that report that interactions were initiated with equal frequency by themselves and the their program officer is:

- larger to that of the average foundation

Initiation of Grantee Contact with Program Officers During Grant

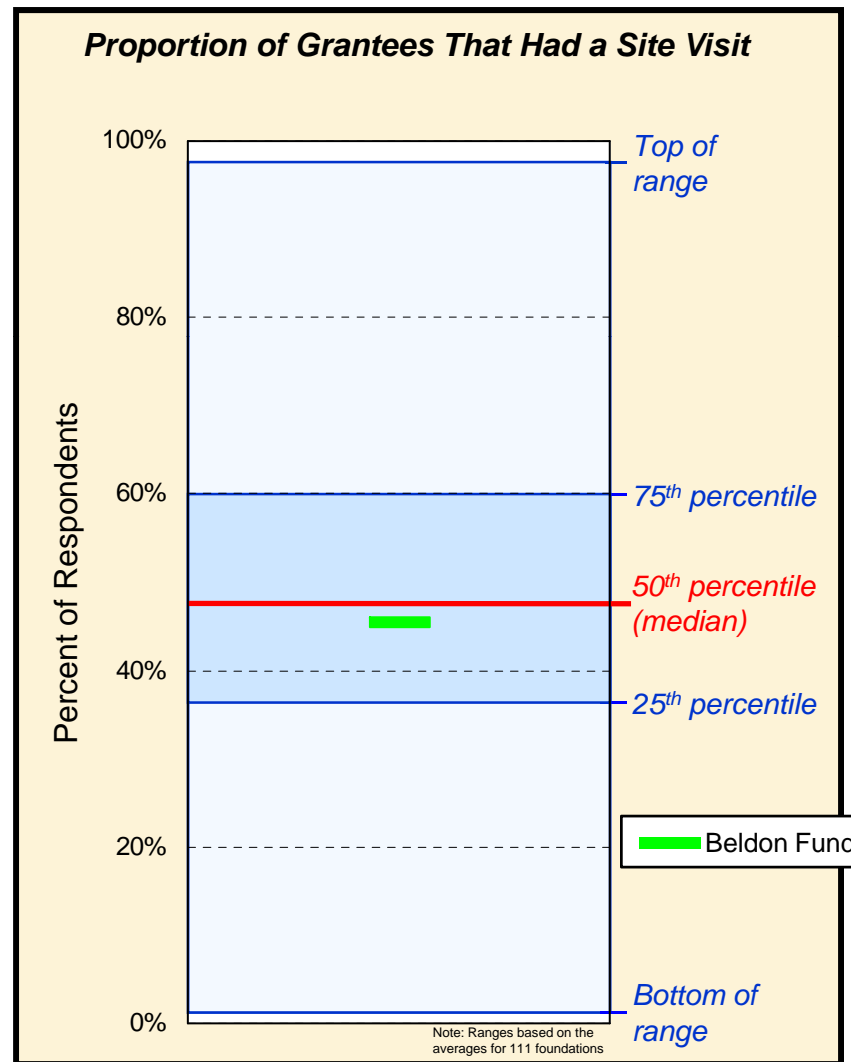


Note: This chart includes data about 111 foundations.

Proportion of Grantees That Had a Site Visit

The proportion of Beldon grantees receiving a site visit during the course of this grant is:

- similar to that of the median foundation



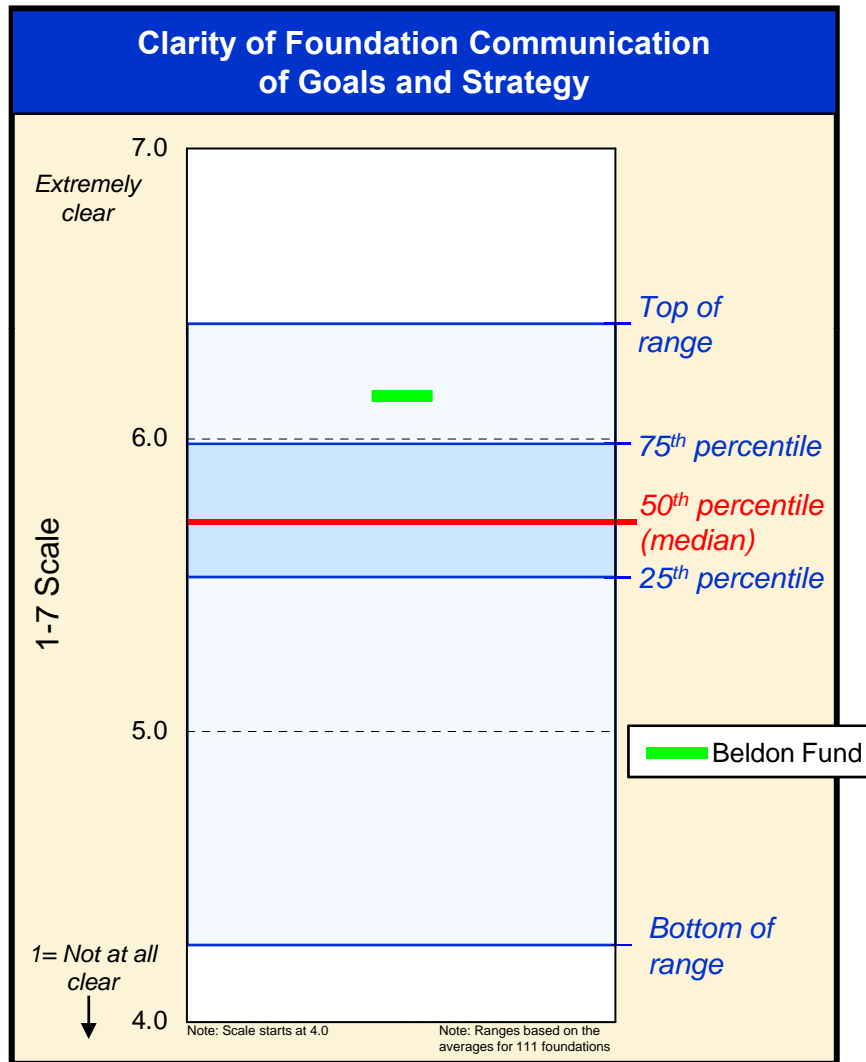
Contents

I.	Introduction	2
II.	External Orientation	
	a) Field-Focused Measures	7
	b) Community-Focused Measures	10
	c) Effectiveness in Creating Social Impact	12
III.	Impact on Grantee Organizations	14
IV.	Satisfaction	20
V.	Interactions	23
VI.	Communication	30
VII.	Assistance Beyond the Grant Check	
	a) Management and Field-Related Assistance	36
	b) Assistance Securing Funding from Other Sources	42
VIII.	Grant Processes and Administration	
	a) Selection Process	48
	b) Reporting and Evaluation Processes	54
	c) Dollar Return on Grantee Administrative Hours	57
IX.	Grantee Suggestions for the Foundation	62
X.	Review of Findings and Analysis and Discussion	65
 <u>Appendix</u>		
A.	Grantmaking/Grantee Characteristics	68
B.	Excerpt of Operational Benchmarking Report (OBR)	84
C.	List of Foundations in Dataset	91
D.	About the Center for Effective Philanthropy	94

Communication of Goals and Strategy

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

- higher than ninety percent of surveyed foundations



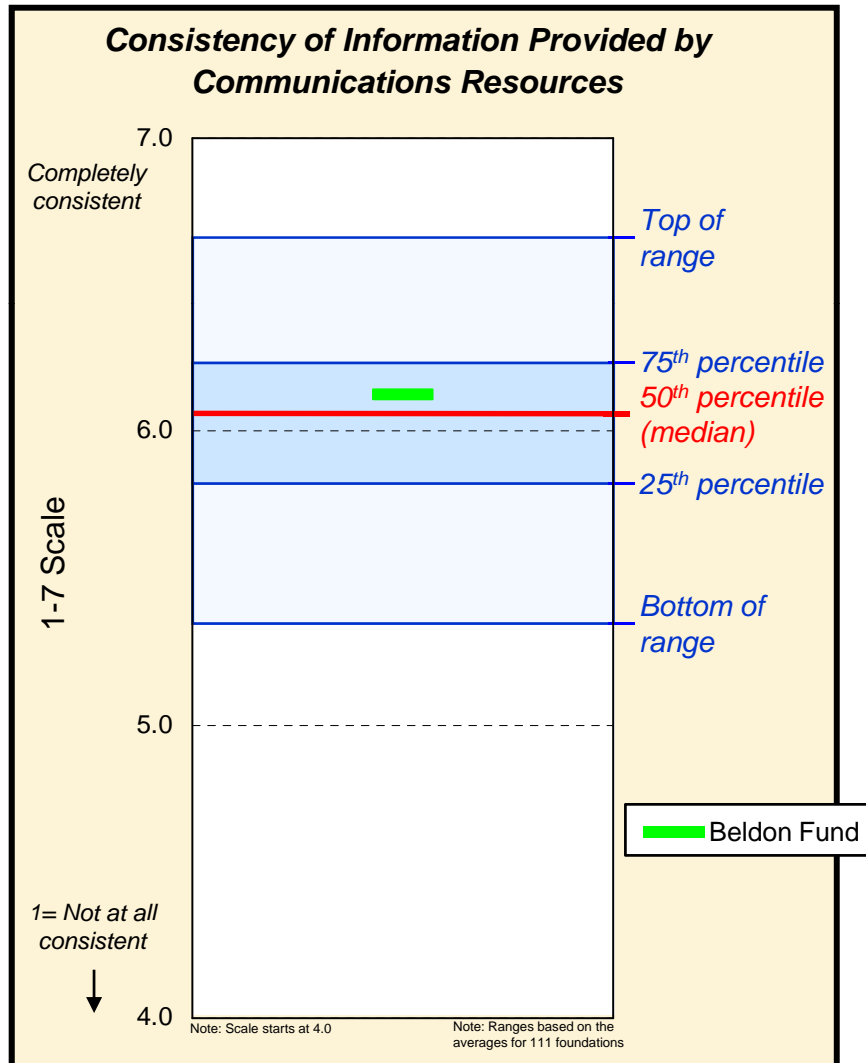
Selected Grantee Comments

- ♦ “They made the job easy: they were clear about what they were looking for and had regular communications with us about our proposal and the funding timeline. Beldon has a great staff.”
- ♦ “Direct, accurate, candid, and extremely helpful. I wish all foundations were as clear as Beldon. It was a pleasure to work with them.”
- ♦ “Strong, for the most part. Sometimes in the past [the Fund] was less clear or less consistent between staff/written communications.”
- ♦ “We’ve always been very happy with the level and quality of communication with all Beldon Fund staff. The advice we’ve received has been consistent with their written communication information.”

Consistency of Communications

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

- similarly to the median foundation

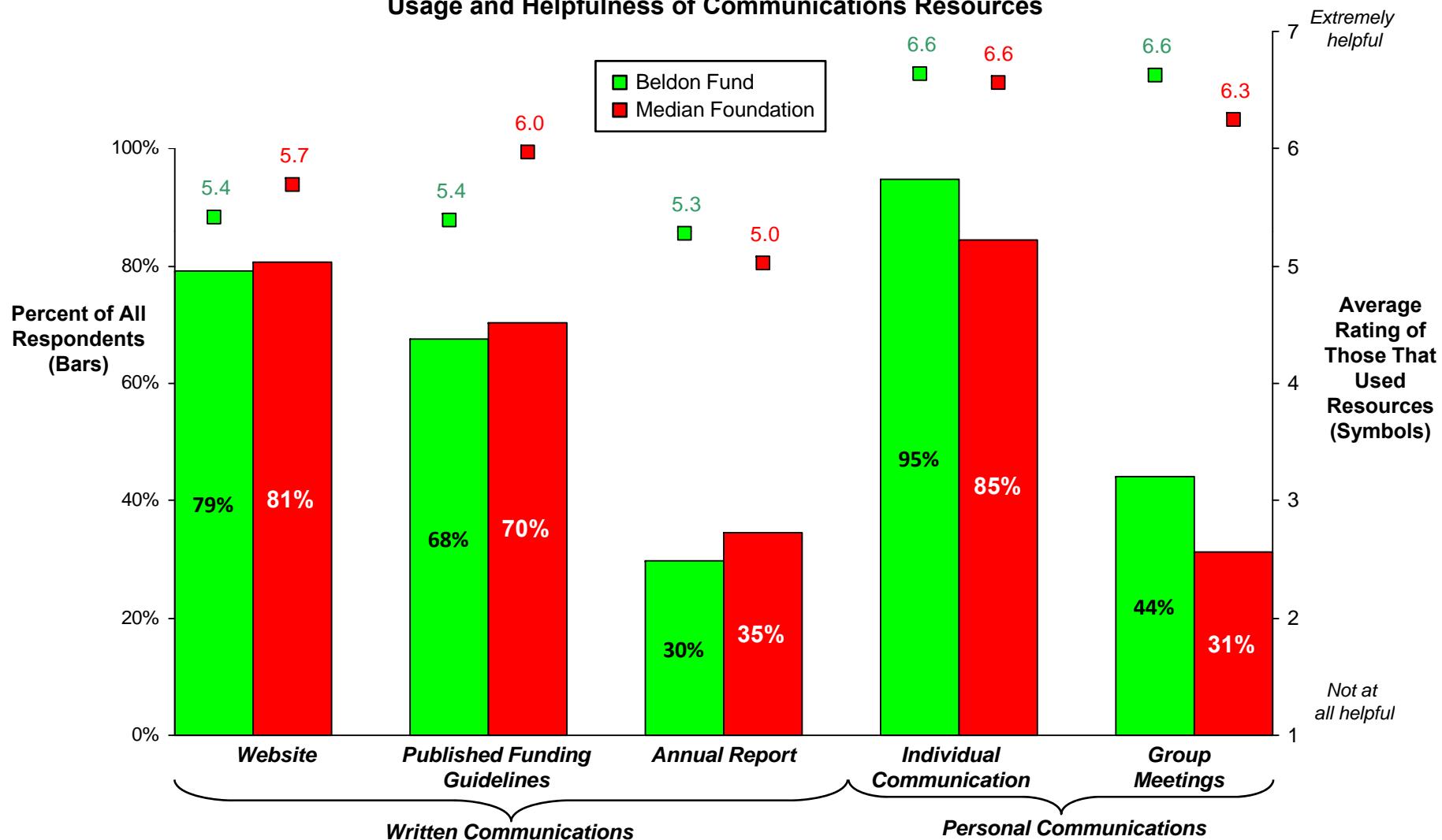


*Survey-Wide Analysis Fact: Consistency of Communications, both personal and written, is the best predictor of grantee ratings of a foundation's clarity of communication of its goals and strategy. Other predictors are 1) Quality of Interactions with Foundation Staff: fairness, responsiveness, approachability and 2) The helpfulness of a foundation's selection and reporting/evaluation processes in strengthening grantees' programs and/or organizations – key moments that can reinforce or undermine foundation messages. For more on these findings, key resources most valued by grantees, and management implications, please see CEP's report, *Foundation Communications: The Grantee Perspective*.*

Communications Resources

Compared to the median foundation, a larger than typical proportion of Beldon grantees report using personal communications with Fund staff to learn about the Fund. The helpfulness of the Fund's communications resources vary relative to the ratings of the median foundation.

Usage and Helpfulness of Communications Resources

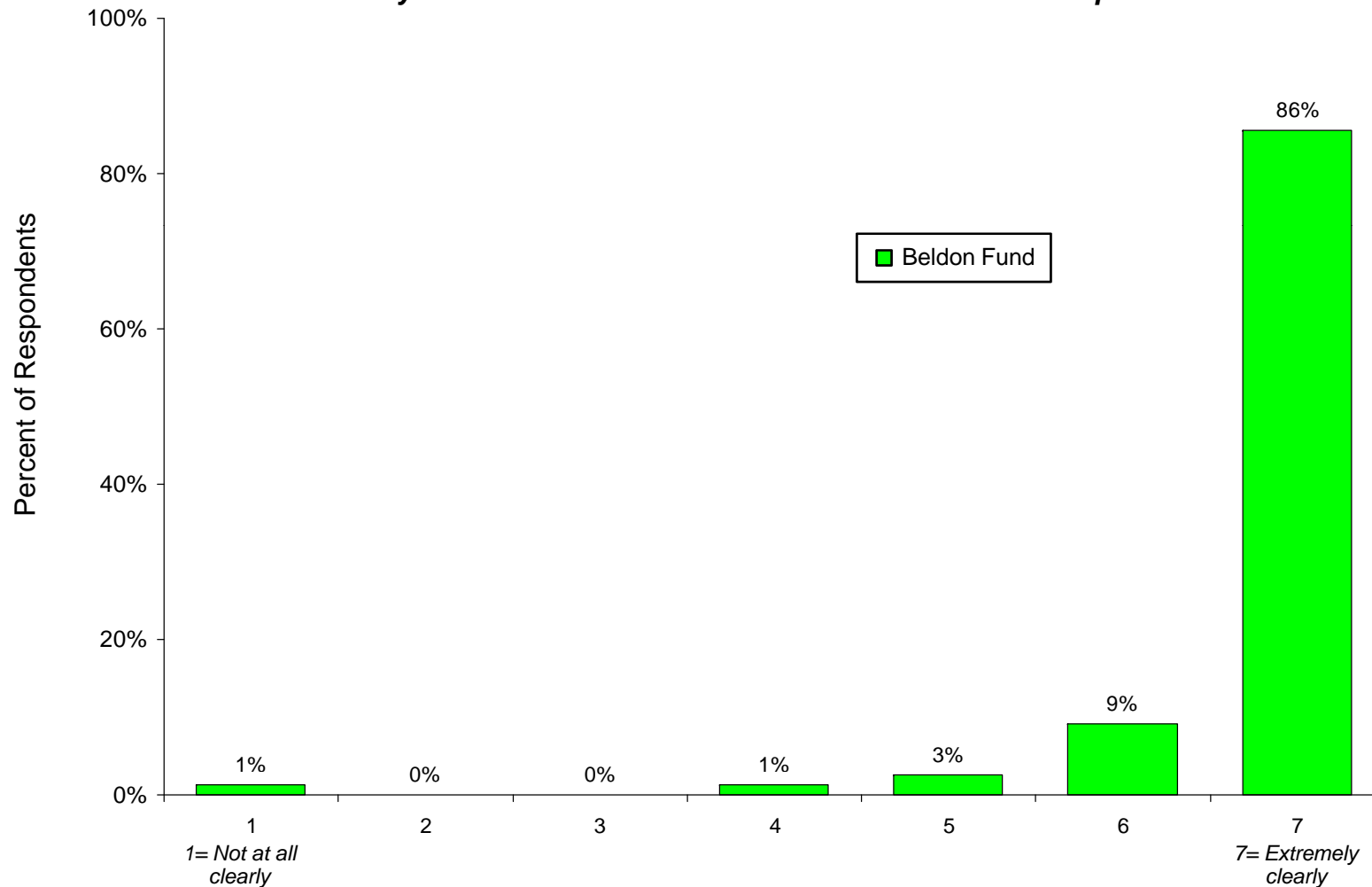


Note: This chart includes data about 111 foundations.

Communication About Spend Down

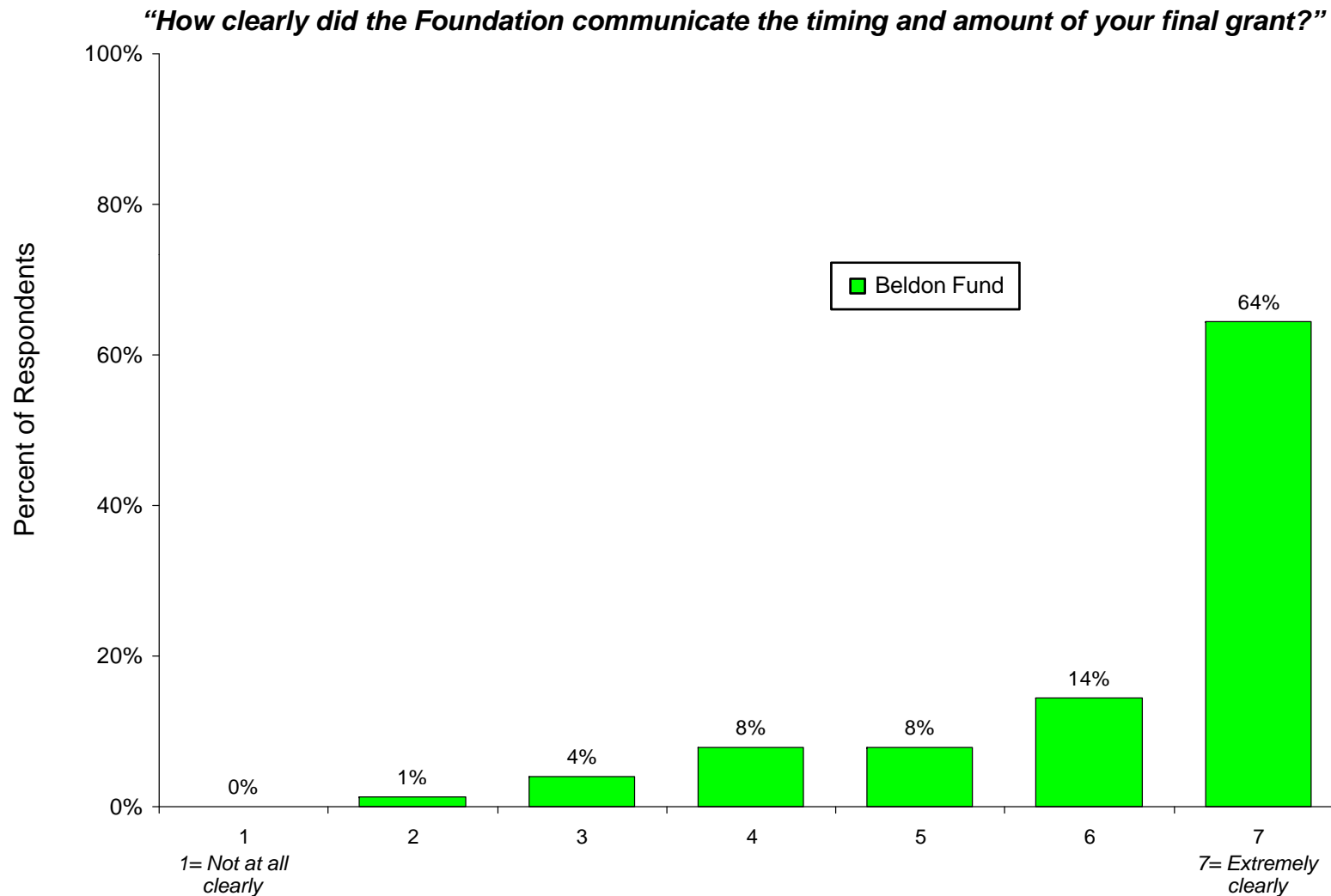
At the time they completed the survey, 99 percent of Beldon grantees were aware that the Fund will no longer be awarding grants after 2008. Beldon grantees were asked to rate the clarity with which the Fund communicated its intention to spend down, with 1= “not at all clearly” and 7 = “extremely clearly” and gave an average rating of 6.7.

“How clearly did the Foundation communicate its intention to spend down?”



Communication About Timing of Final Grant

Beldon grantees were asked to rate the clarity with which the Fund communicated the timing and amount of their final grant, with 1= “not at all clearly” and 7 = “extremely clearly” and gave an average rating of 6.2.



Contents

I.	Introduction	2
II.	External Orientation	
	a) Field-Focused Measures	7
	b) Community-Focused Measures	10
	c) Effectiveness in Creating Social Impact	12
III.	Impact on Grantee Organizations	14
IV.	Satisfaction	20
V.	Interactions	23
VI.	Communication	30
VII.	Assistance Beyond the Grant Check	
	a) Management and Field-Related Assistance	36
	b) Assistance Securing Funding from Other Sources	42
VIII.	Grant Processes and Administration	
	a) Selection Process	48
	b) Reporting and Evaluation Processes	54
	c) Dollar Return on Grantee Administrative Hours	57
IX.	Grantee Suggestions for the Foundation	62
X.	Review of Findings and Analysis and Discussion	65
	<u>Appendix</u>	
A.	Grantmaking/Grantee Characteristics	68
B.	Excerpt of Operational Benchmarking Report (OBR)	84
C.	List of Foundations in Dataset	91
D.	About the Center for Effective Philanthropy	94

Non-Monetary Assistance Summary

On this summary that includes whether grantees received individual assistance activities from the Fund or third parties and ratings of helpfulness of assistance activities Beldon is:

- above the median foundation

Non-Monetary Assistance Activities Included in Summary

MANAGEMENT ASSISTANCE

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

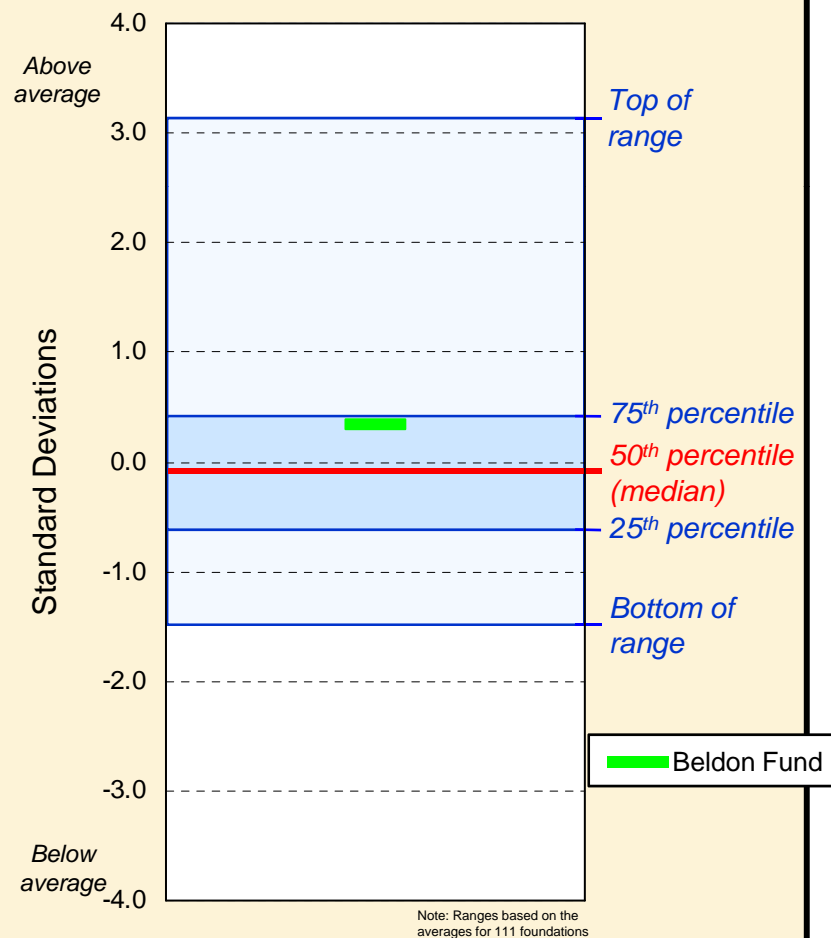
FIELD-RELATED ASSISTANCE

- 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

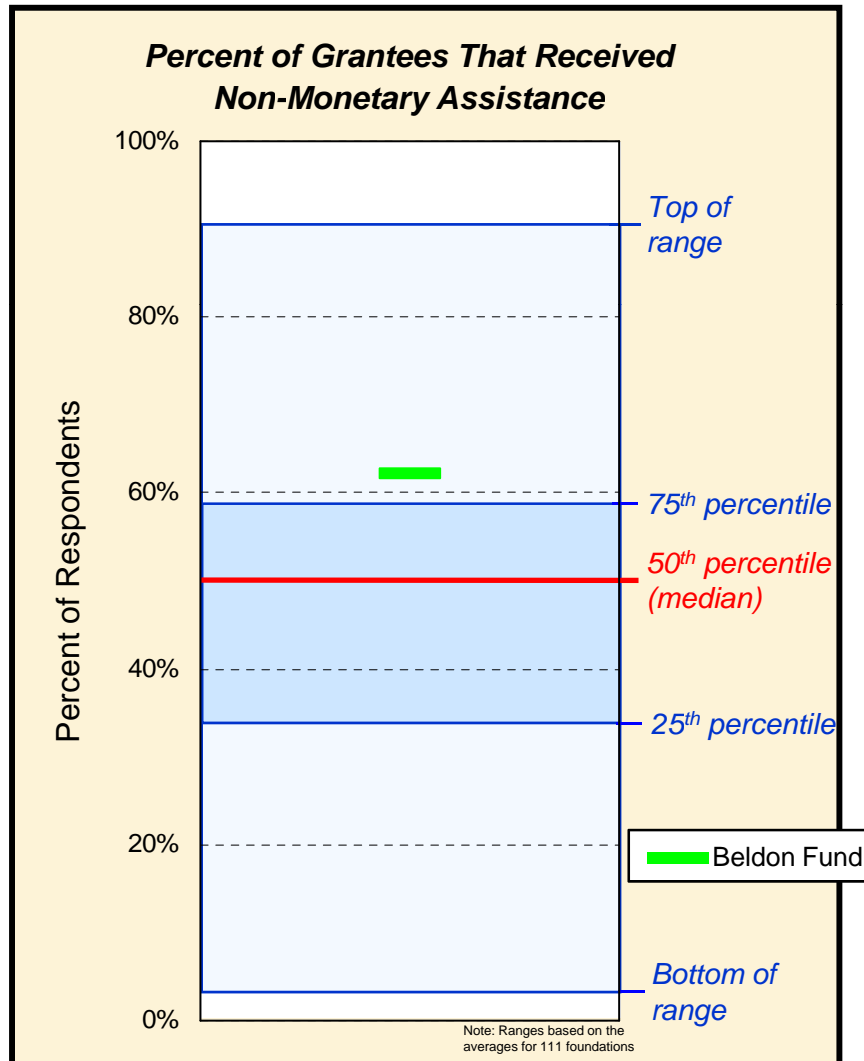
Non-Monetary Assistance Summary



Non-Monetary Assistance

The proportion of Beldon grantees receiving any non-monetary assistance is:

- larger than that of the median foundation



Selected Grantee Comments

- ♦ “Their support of our exploring collaborative alliances with other organizations was a very useful exercise, even though the result was not what they expressed the strongest interest in. As a result of that conversation, we have continued to focus our work and improve our strategies and relationships across our community.”
- ♦ “Beldon, and especially [our program officer], provided insights about related projects nationally, included us in network building, connected us to additional resources, and advised us on informational resources and good models.”
- ♦ “Our program director’s experience in the field – both funding and environmental health – were invaluable. She freely shared helpful information and was supportive through a major staffing change – providing guidance based on her knowledge of all involved.”
- ♦ “They know everyone and it’s my impression they’re as helpful to others as they’ve been to us. They routinely suggest partnerships to extend the reach of each group individually.”

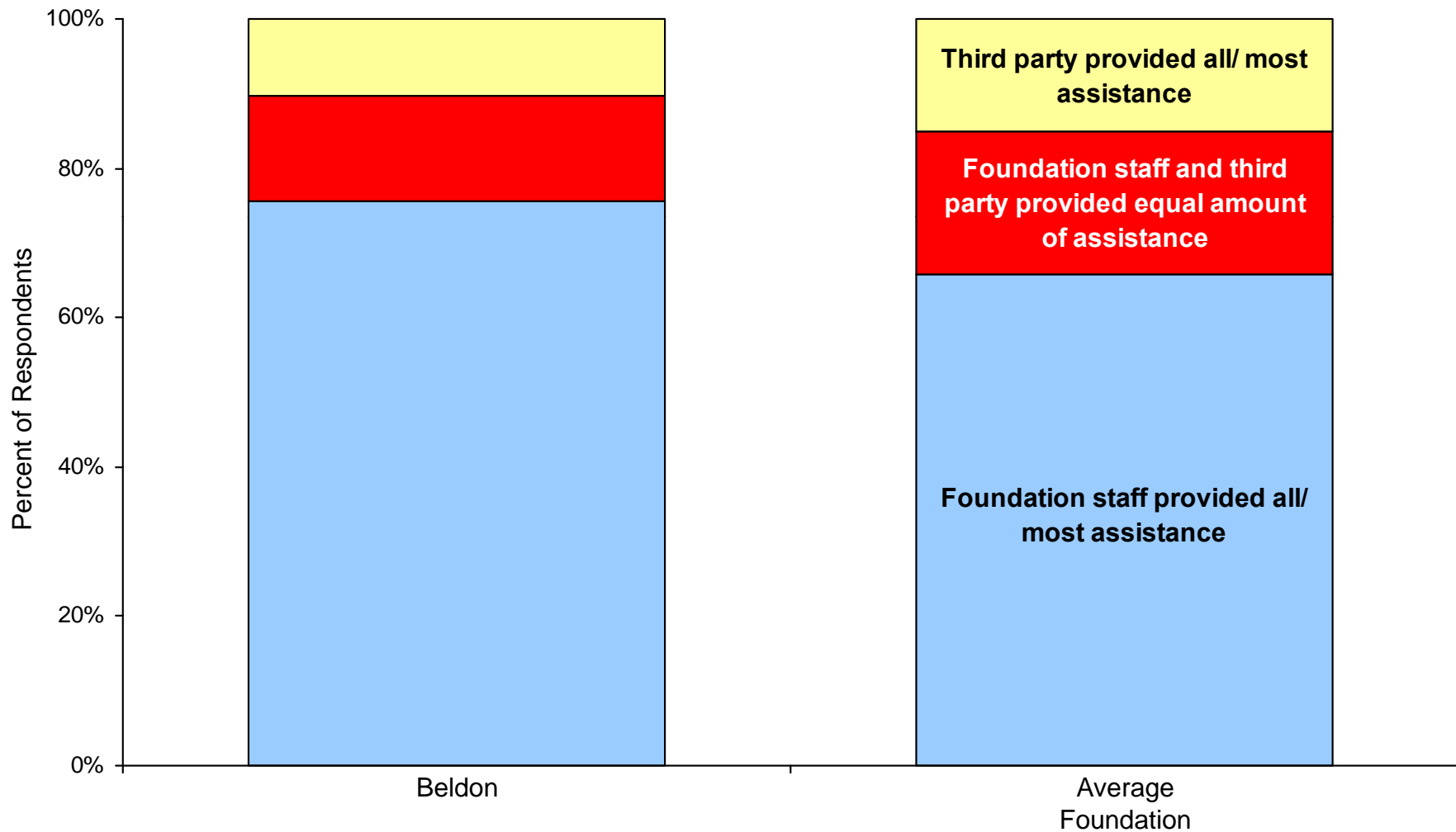
Who Provided Non-Monetary Assistance

The proportion of Beldon grantees that report that program staff provided all or most of the assistance they received is:

- greater than that of the average foundation

foundation

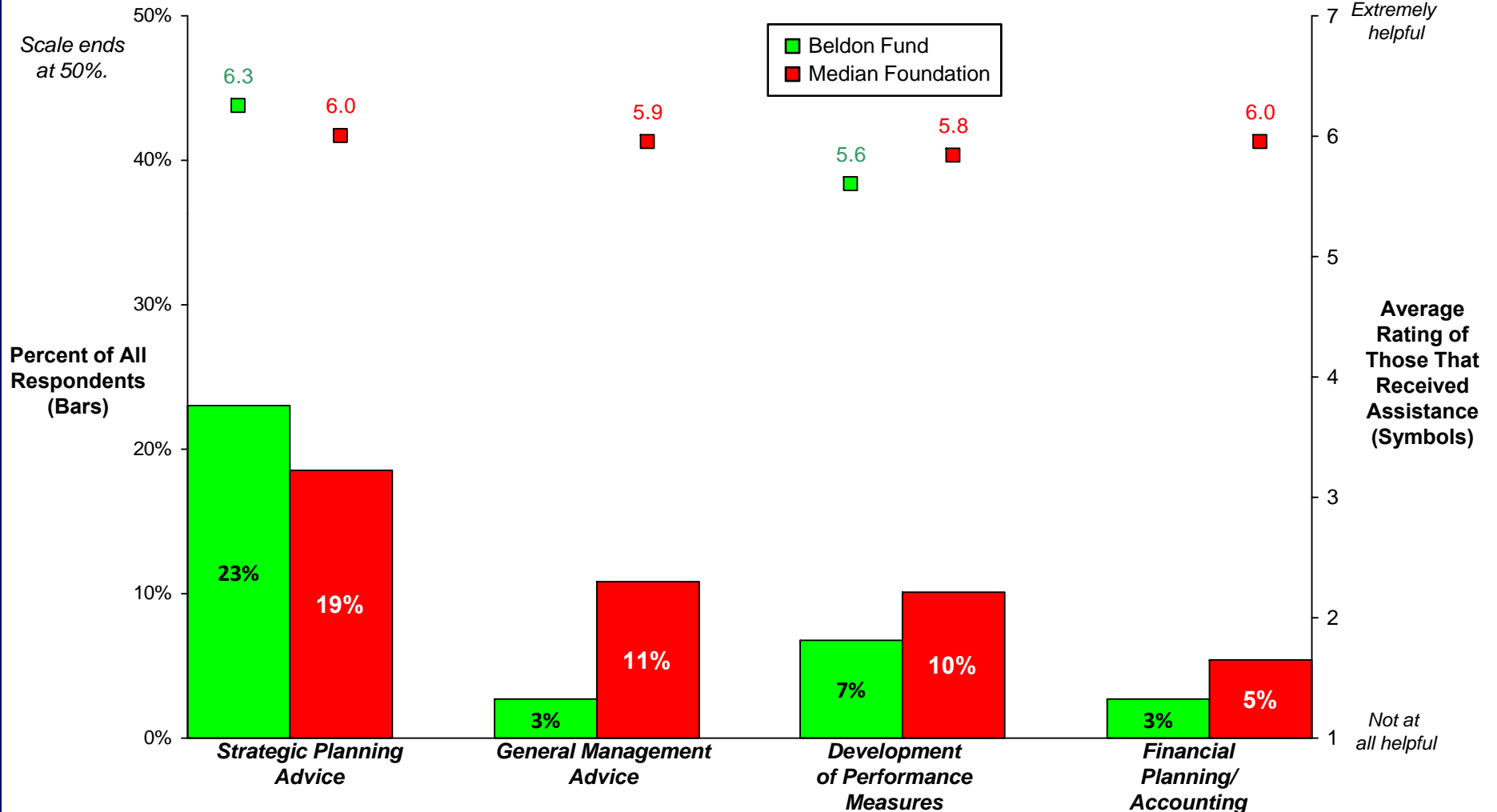
Who Provided Non-Monetary Assistance



Management Assistance Activities & Helpfulness

A larger proportion of Beldon grantees report receiving strategic planning advice than grantees of other foundations. The helpfulness of different management assistance activities is seen to vary relative to the ratings received by the median foundation.

Frequency and Helpfulness of Management Assistance Activities

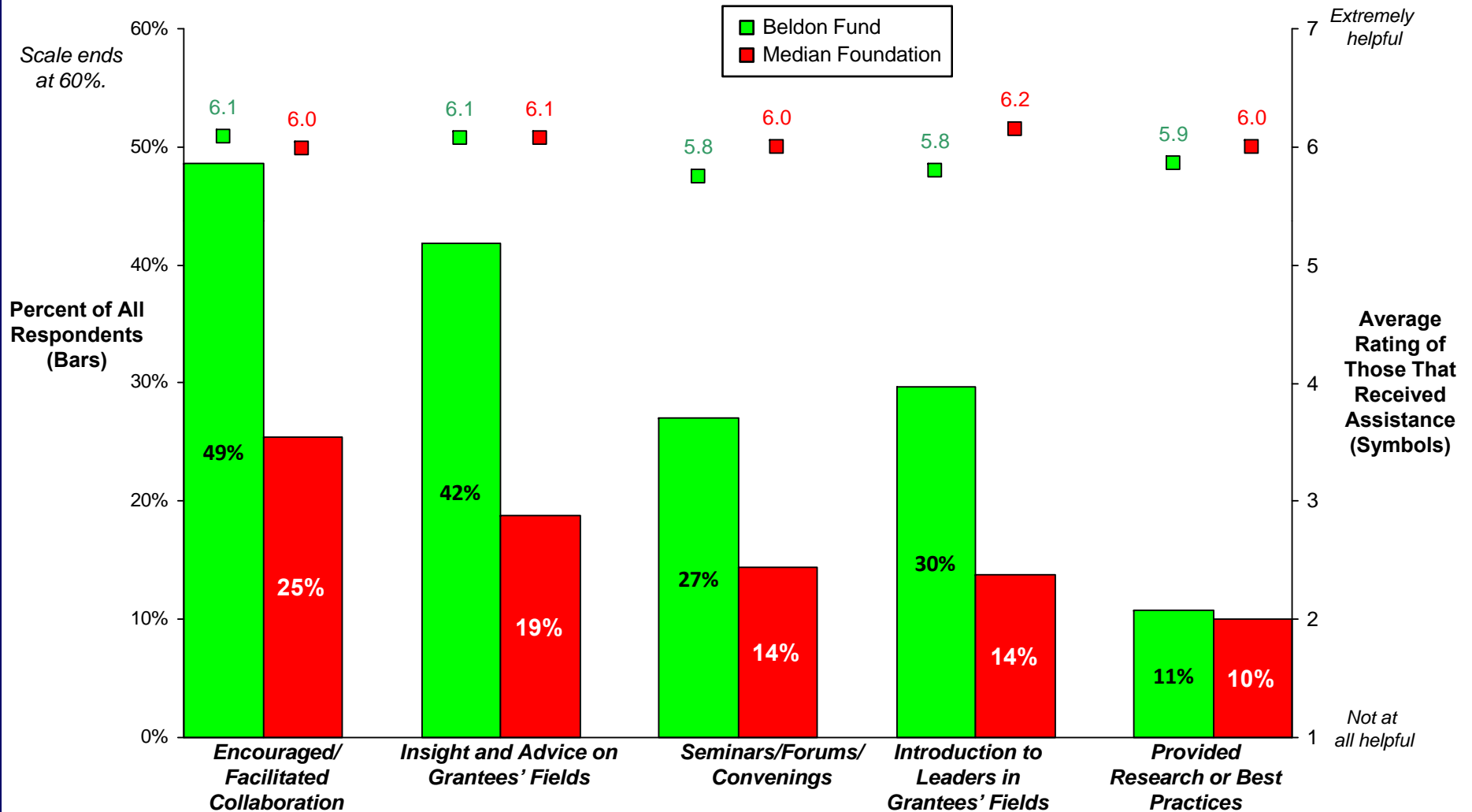


Note: This chart includes data about 111 foundations. Individual helpfulness ratings not shown when fewer than five responses were received.

Field-Related Assistance Activities & Helpfulness

A larger than typical proportion of Beldon grantees are provided field-related assistance. The helpfulness of these activities is rated similarly to or below the activities provided by the median foundation.

Frequency and Helpfulness of Field-Related Assistance Activities

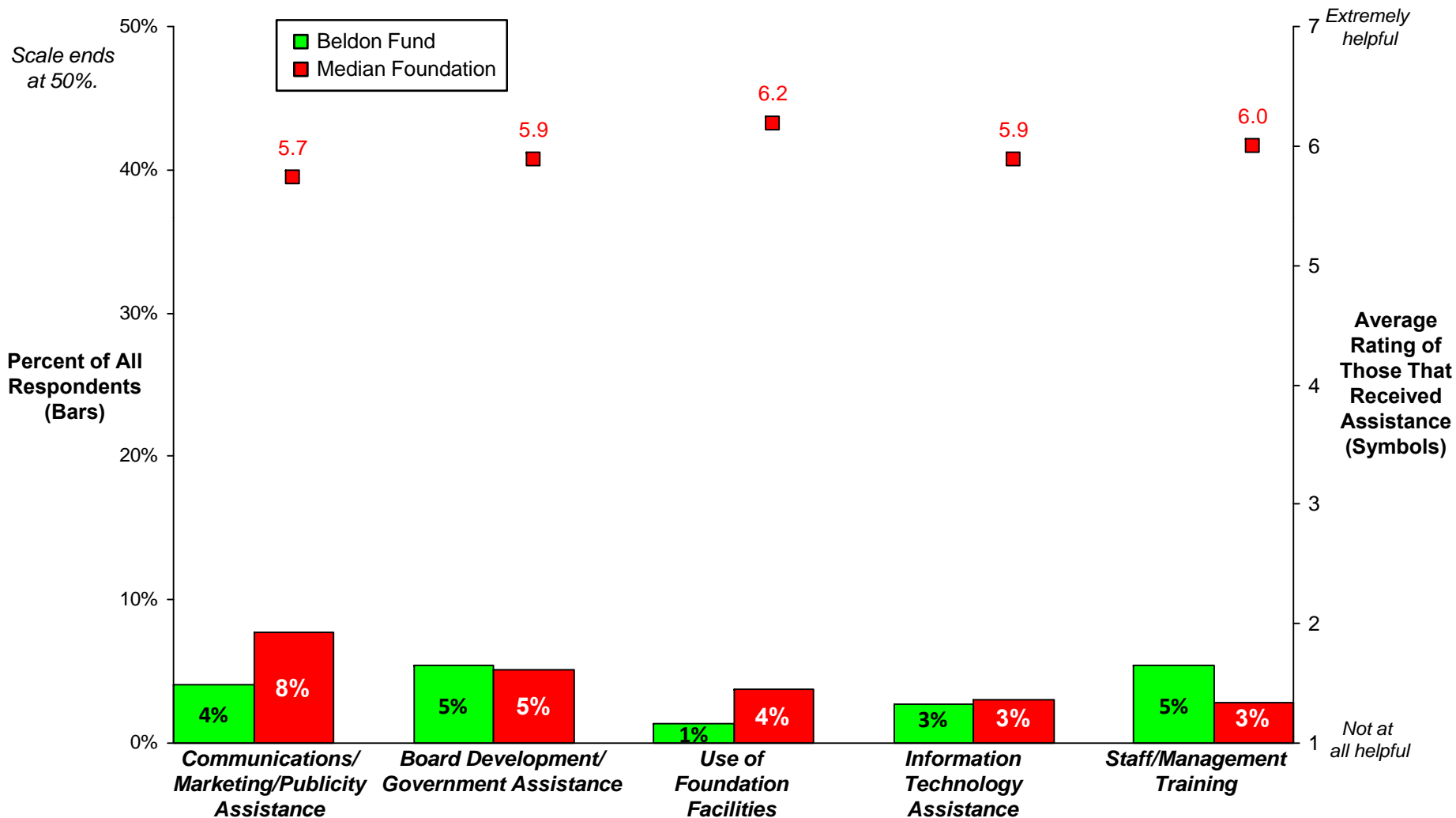


Note: This chart includes data about 111 foundations.

Other Support Activities & Helpfulness

Beldon provides a typical proportion of grantees with board development/governance assistance and staff/management training.

Frequency and Helpfulness of Other Assistance Activities



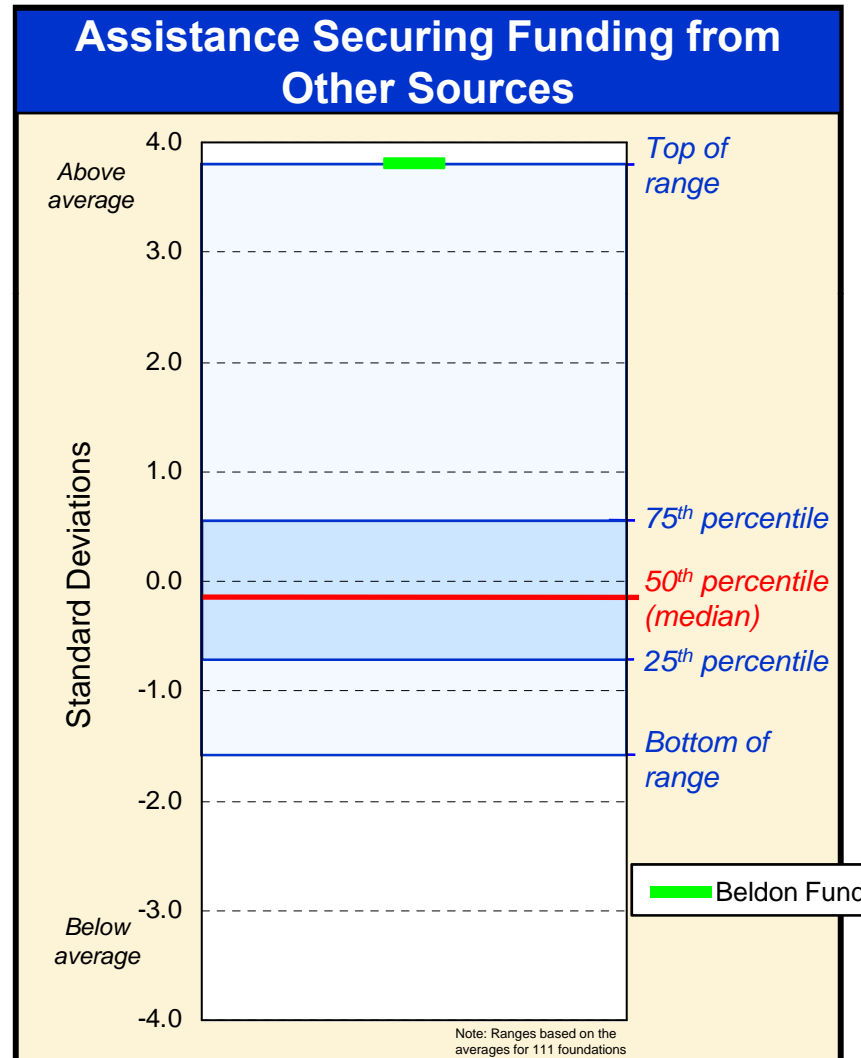
41 VII. Assistance Beyond the Grant Check

Note: This chart includes data about 111 foundations. Individual helpfulness ratings not shown when fewer than five responses were received.

Assistance Securing Funding from Other Sources

On this summary that includes the frequency of active foundation assistance in obtaining additional funding from other sources and the impact of those efforts Beldon is:

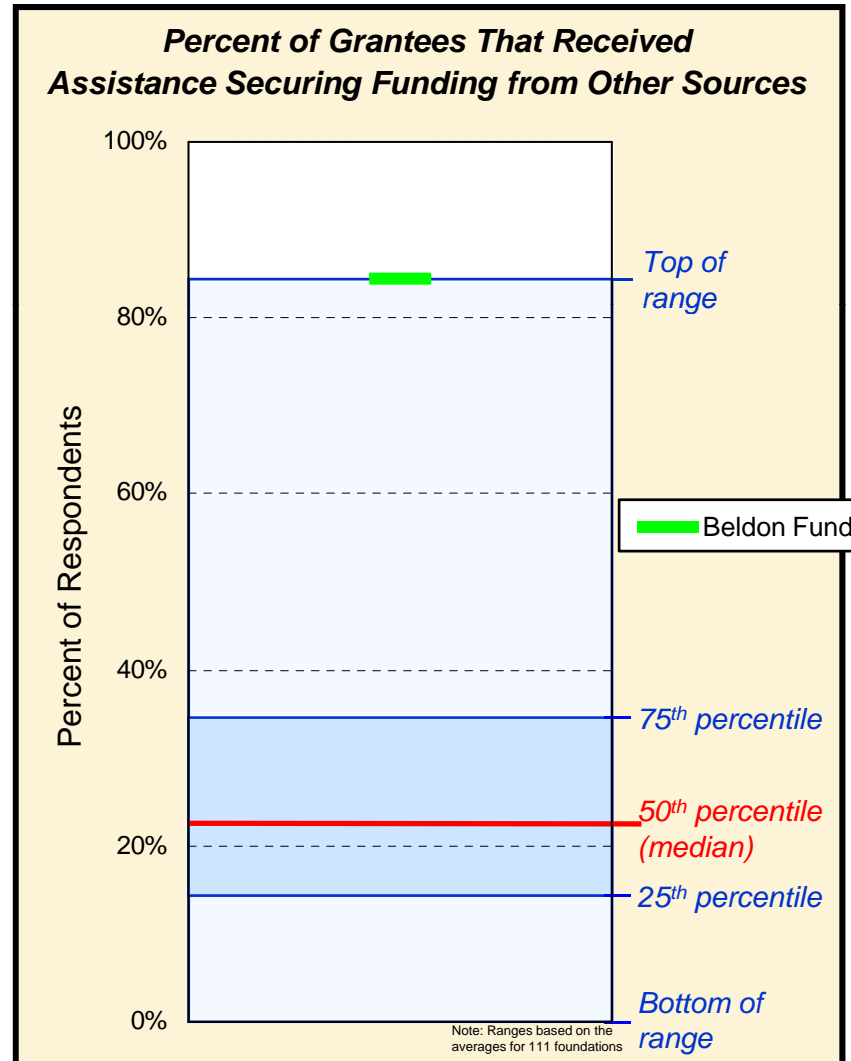
- higher than all other surveyed foundations



Proportion of Grantees Obtaining Assistance Securing Funding from Other Sources

The proportion of Beldon grantees receiving active assistance from the Fund in securing funding from other sources is:

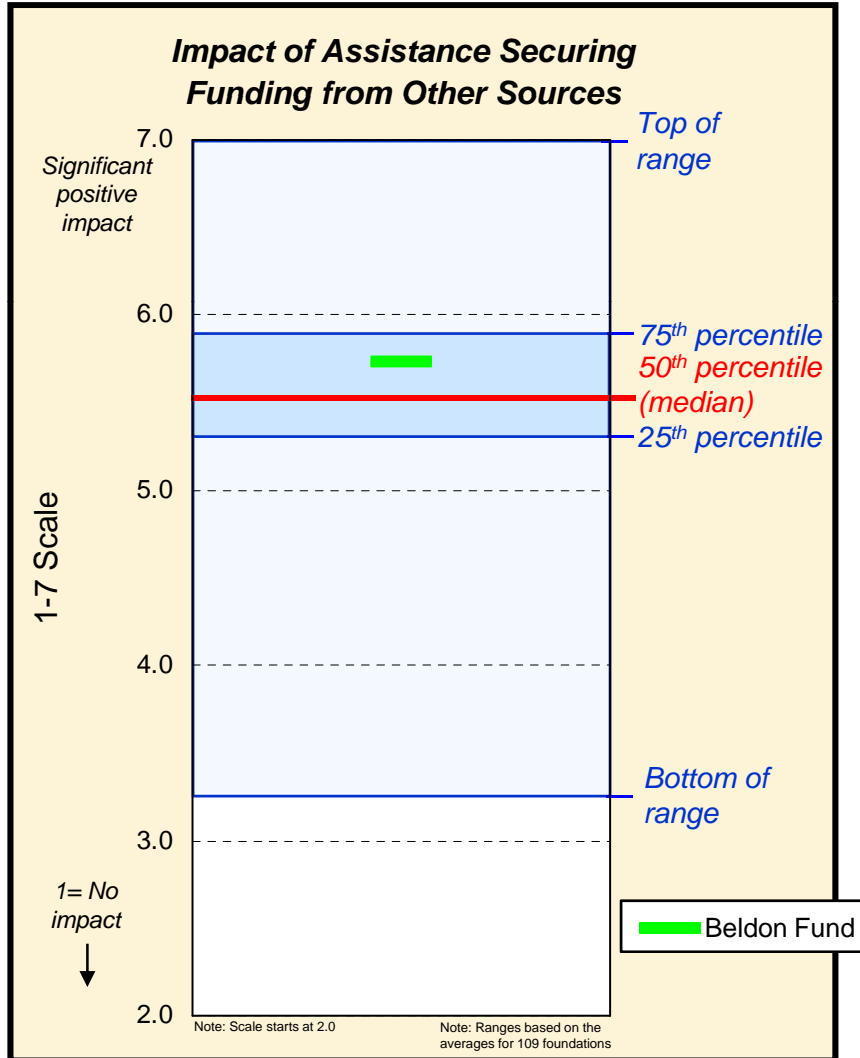
- larger than that of all other surveyed foundations



Impact of Assistance Securing Funding from Other Sources

On impact of the Fund's assistance in securing funding from other sources, Beldon is rated:

- above the median foundation

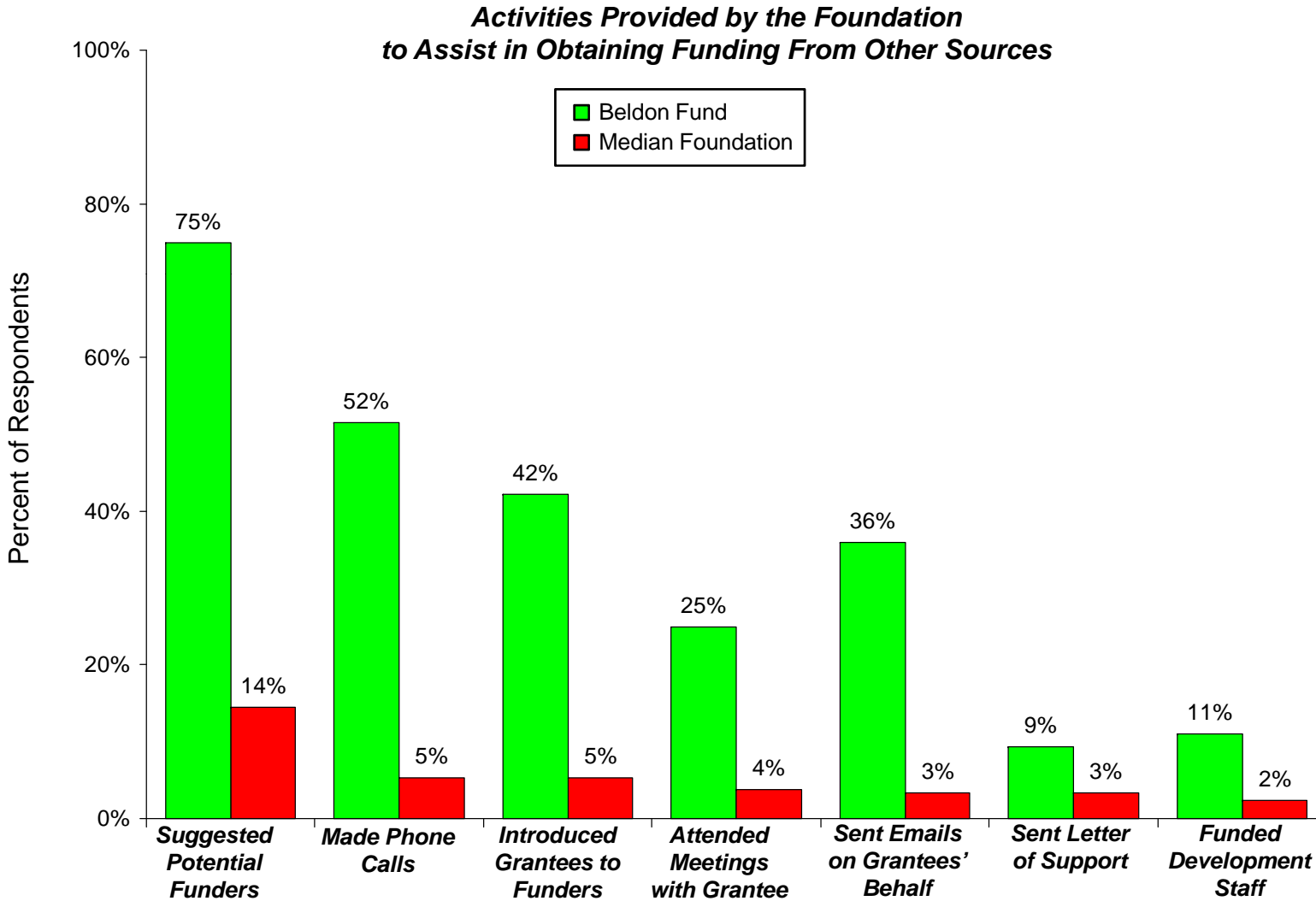


Selected Grantee Comments

- ♦ “Beldon’s support has been instrumental in raising the profile of our work, opening doors to other funders.”
- ♦ “Foundation staff were helpful with rallying other foundation supporters for the work.”
- ♦ “Beldon introduced us to other organizations and funders [and] gave us the opportunity to create new partnerships. We can build upon these relationships into the future.”
- ♦ “Beldon had a big impact by seeding some of our projects which then made other foundations feel less nervous. The staff was wonderful at bringing other funders to the table and helping to provide a sense of urgency and importance to their (and our) change-related goals.”
- ♦ “[Beldon’s] contribution was helpful in gaining credibility with other donors in the field.”

Frequency of Assistance Securing Funding from Other Sources

Beldon grantees report receiving a larger than typical amount of assistance securing funding from other sources from the Fund.

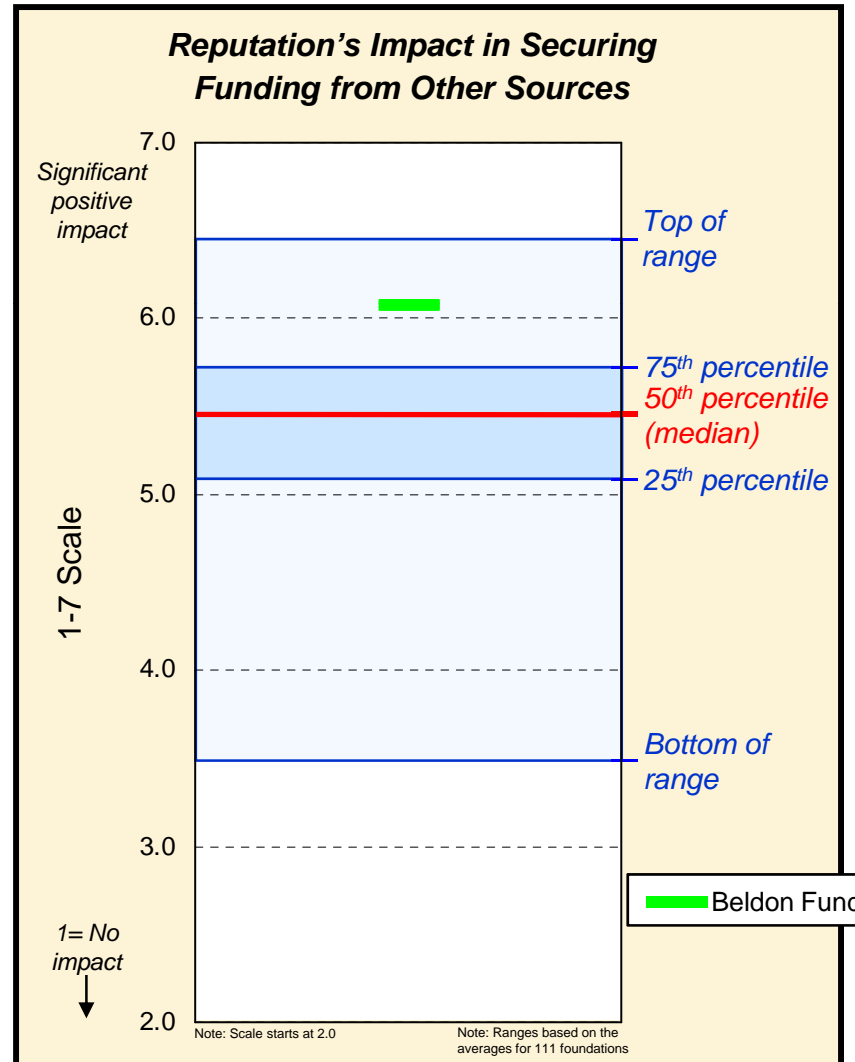


Note: This chart includes data about 111 foundations, with the exception of "sent emails on grantees' behalf" which includes data about 88 foundations.

Impact of Reputation

On impact of the Fund's reputation on grantees' ability to secure funding from other sources, Beldon is rated:

- higher than ninety percent of surveyed foundations



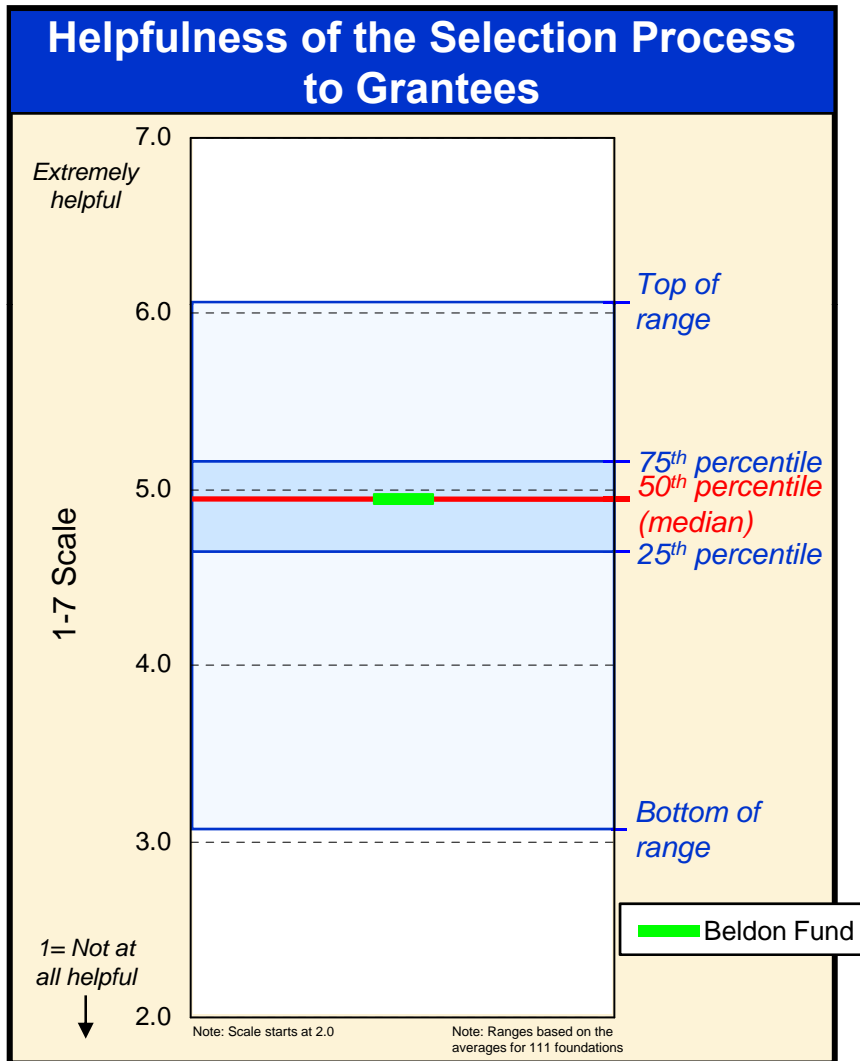
Contents

I.	Introduction	2
II.	External Orientation	
	a) Field-Focused Measures	7
	b) Community-Focused Measures	10
	c) Effectiveness in Creating Social Impact	12
III.	Impact on Grantee Organizations	14
IV.	Satisfaction	20
V.	Interactions	23
VI.	Communication	30
VII.	Assistance Beyond the Grant Check	
	a) Management and Field-Related Assistance	36
	b) Assistance Securing Funding from Other Sources	42
VIII.	Grant Processes and Administration	
	a) Selection Process	48
	b) Reporting and Evaluation Processes	54
	c) Dollar Return on Grantee Administrative Hours	57
IX.	Grantee Suggestions for the Foundation	62
X.	Review of Findings and Analysis and Discussion	65
 <u>Appendix</u>		
A.	Grantmaking/Grantee Characteristics	68
B.	Excerpt of Operational Benchmarking Report (OBR)	84
C.	List of Foundations in Dataset	91
D.	About the Center for Effective Philanthropy	94

Helpfulness of Selection Process

On helpfulness of the Foundation’s selection process in strengthening the grantee, Beldon is rated:

- similarly to the median foundation



Selected Grantee Comments

- ♦ “The foundation is wonderful at returning calls, emails and any other inquiries. The staff is knowledgeable and helps you focus your proposal without losing your organization’s personal vision.”
- ♦ “When it comes to [our organization’s] proposals, I feel like the communication is great.”

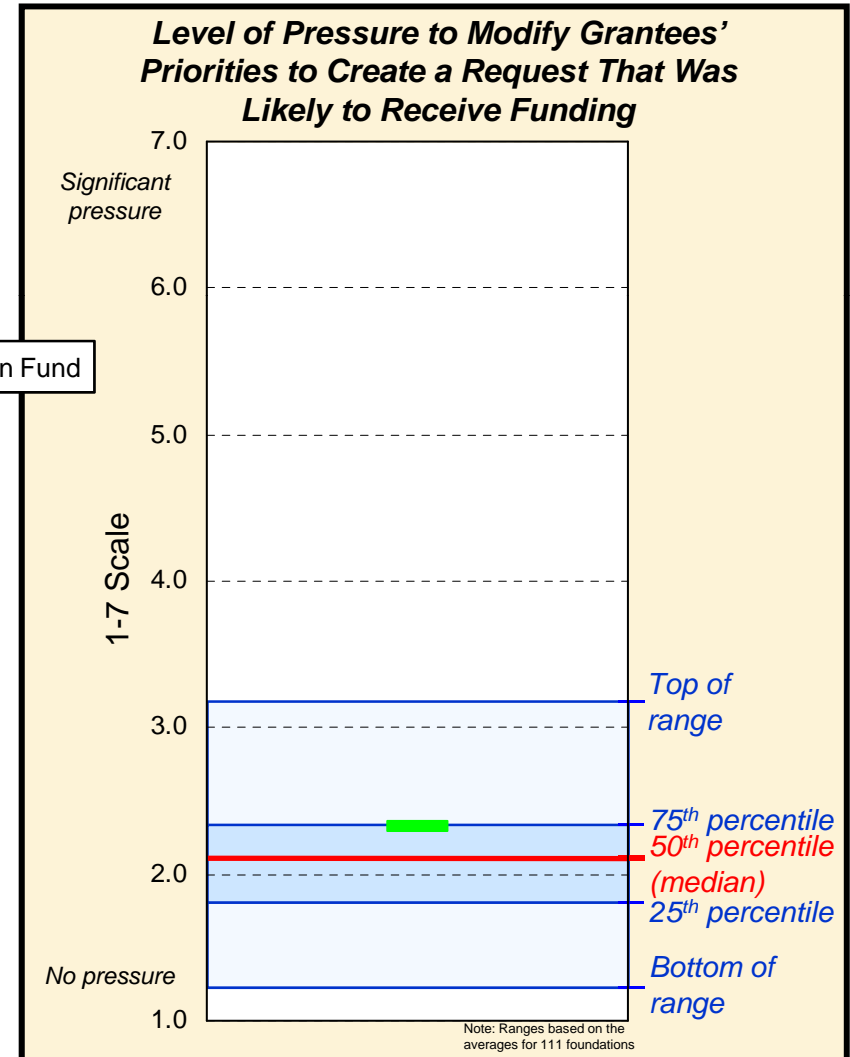
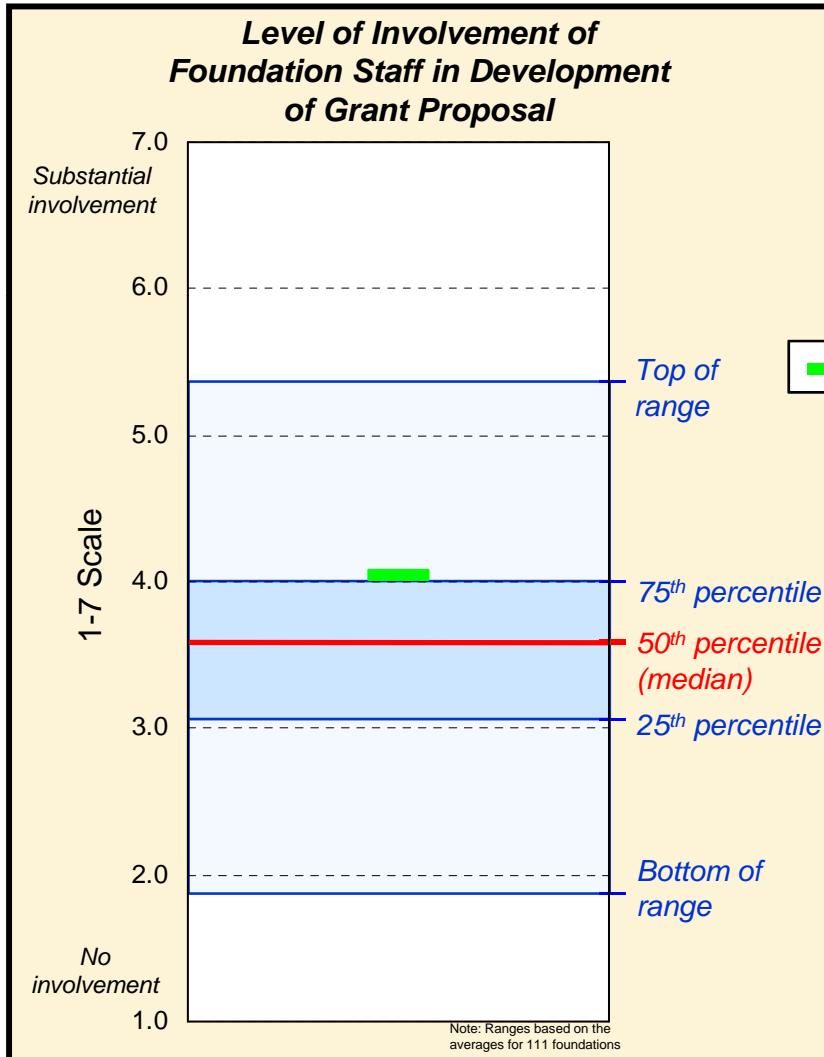
Foundation Involvement and Pressure in Selection Process

On the level of involvement in the development of grantees' proposals, Beldon is rated:

- above the median foundation

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

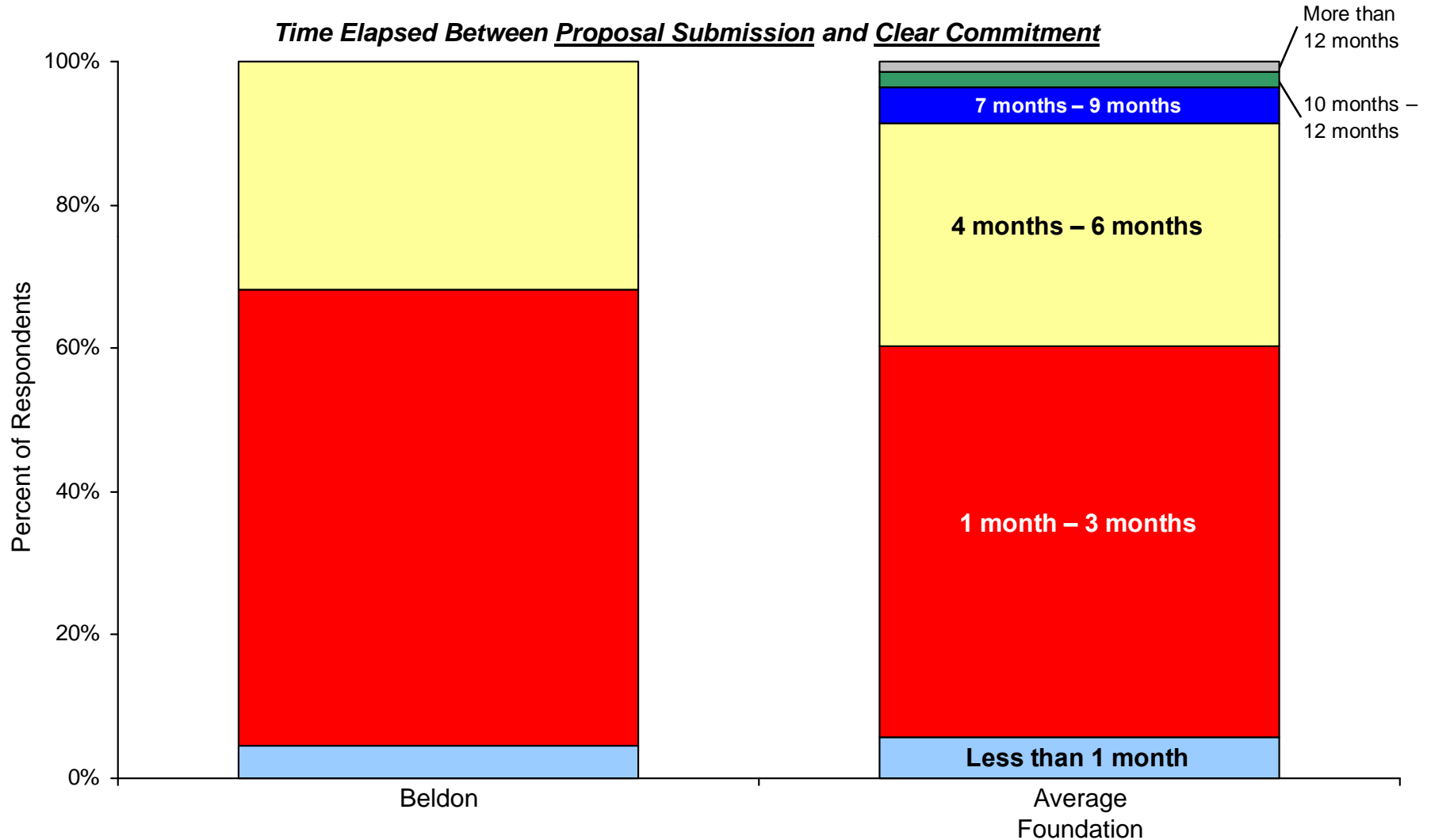
- slightly above the median foundation



Time Between Submission and Clear Commitment

The proportion of Beldon grantees that report that six months or less elapsed between submission of proposal and clear commitment of funding is:

- greater than that of the average foundation

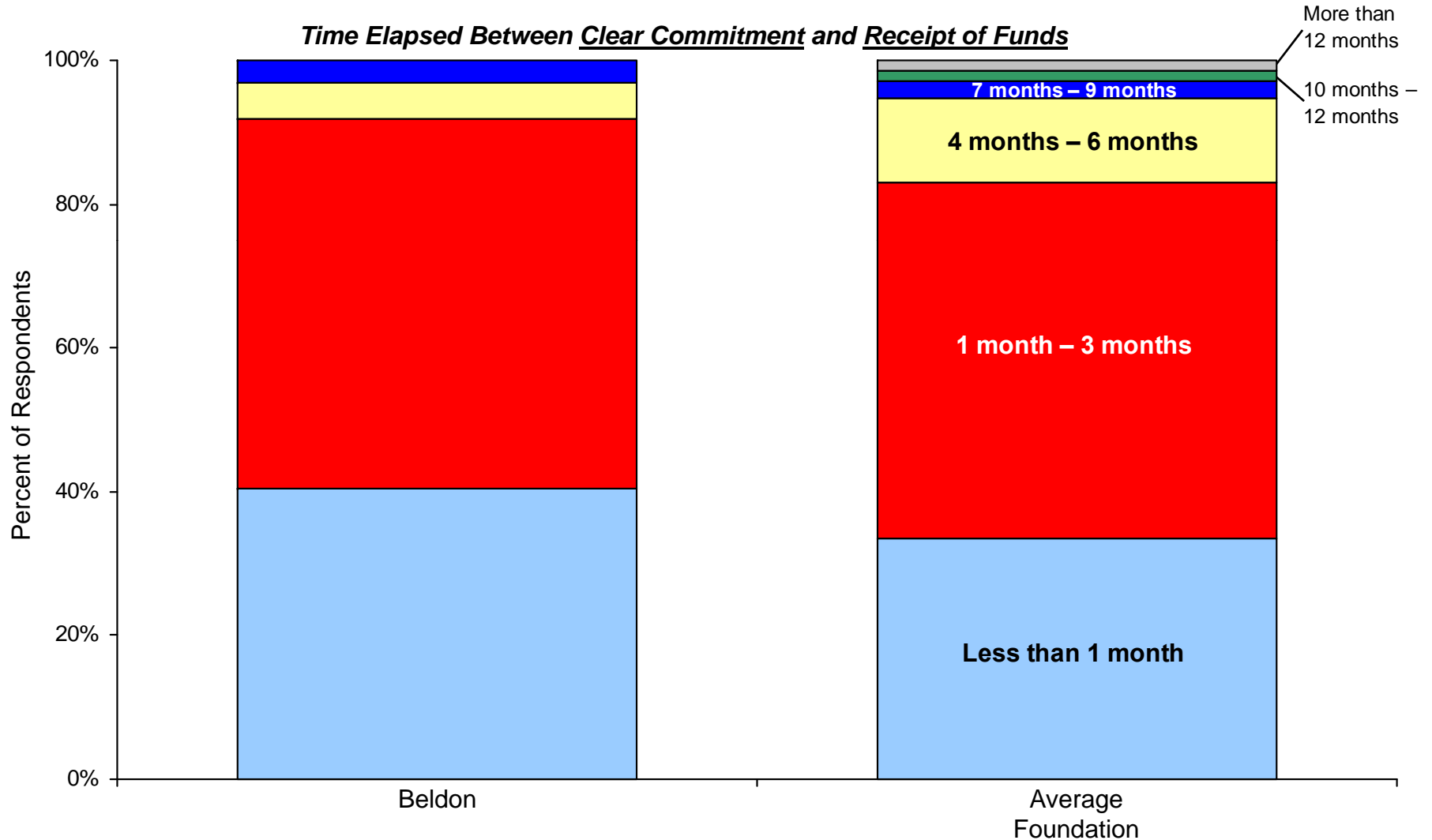


Note: This chart includes data about 111 foundations.

Time Between Clear Commitment and Receipt of Funds

The proportion of Beldon grantees that report four months or more elapsing between clear commitment of funding and receipt of funds from the Fund is:

- smaller than that of the average foundation

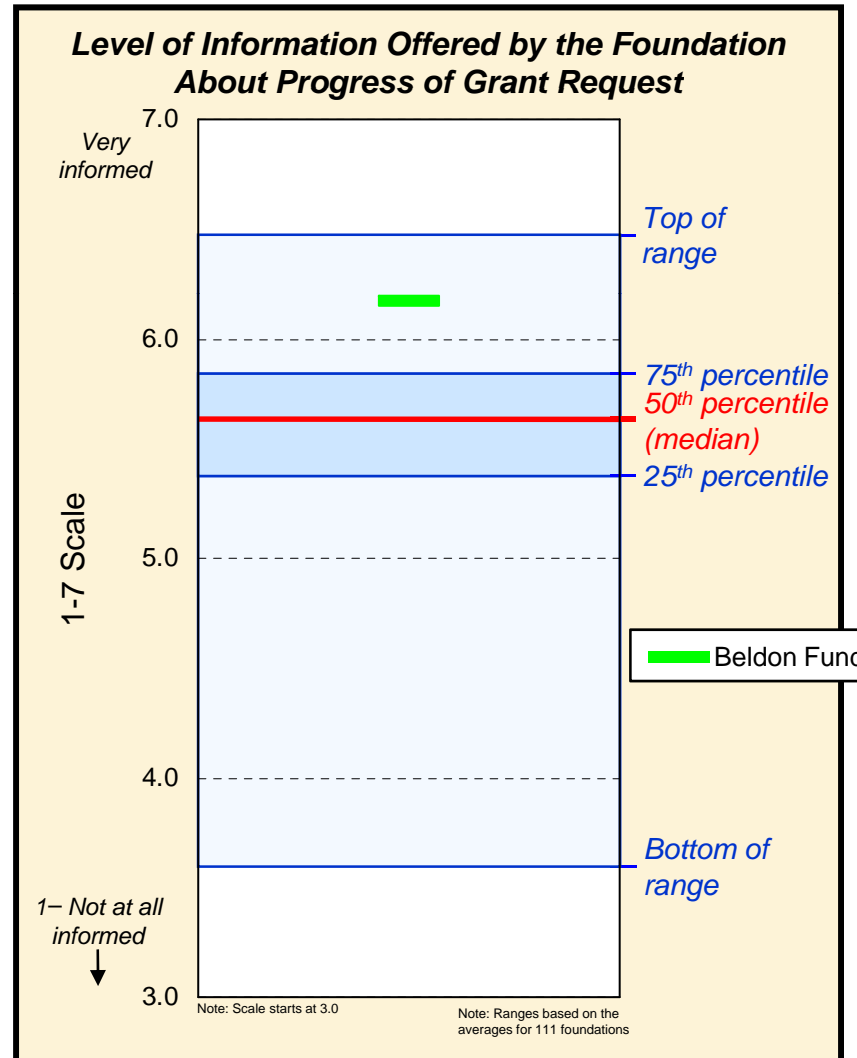


Note: This chart includes data about 111 foundations.

Communication During Selection Process

On the level of information that the Fund provides about the progress of the grant request, Beldon is rated:

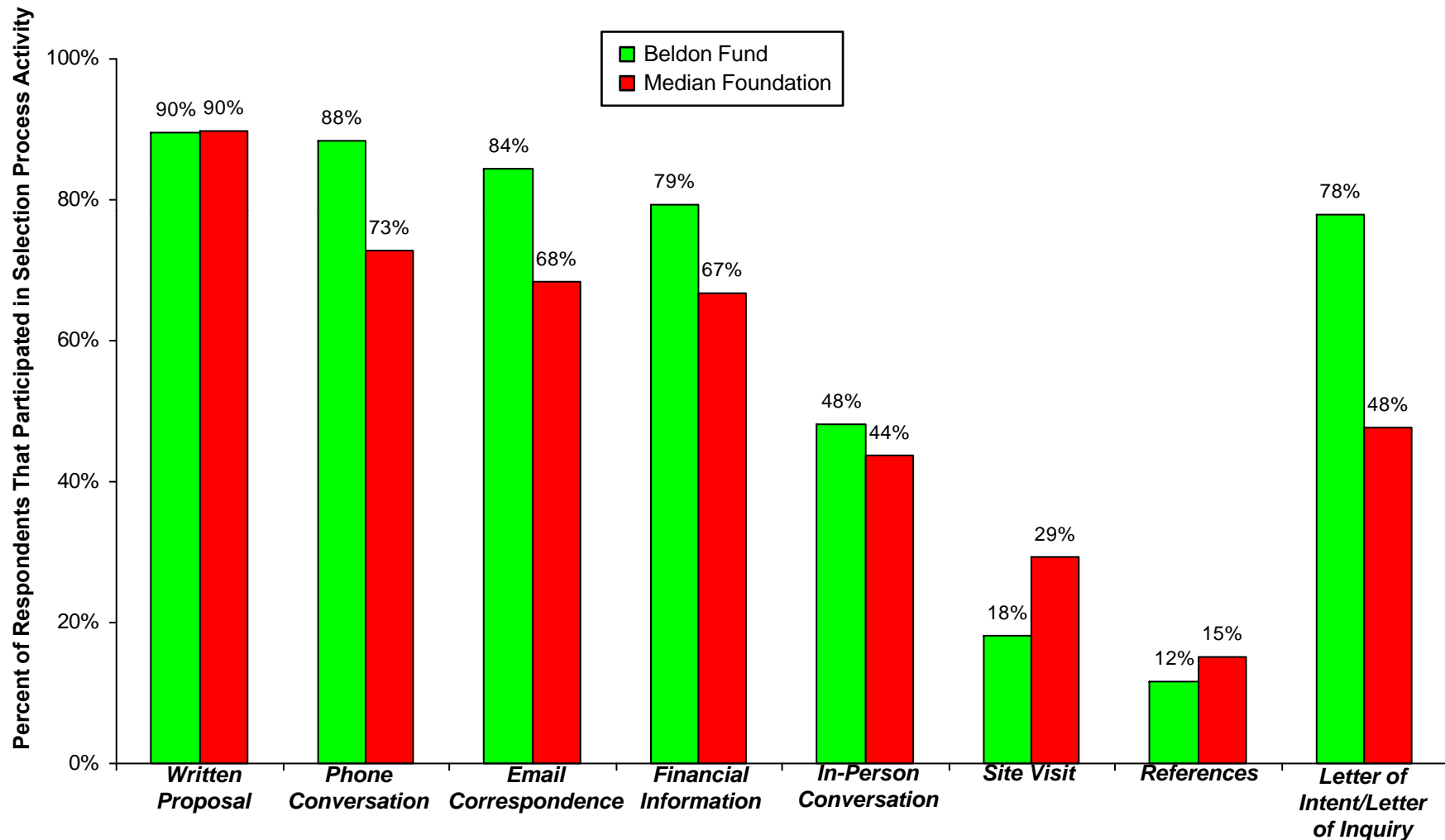
- higher than ninety percent of surveyed foundations



Selection Process Activities

Compared to grantees of the median foundation, Beldon grantees more frequently report engaging in phone, in-person conversations, and email correspondence with Fund staff. Beldon grantees also more frequently report submitting financial information as part of the selection process.

Selection Process Activities

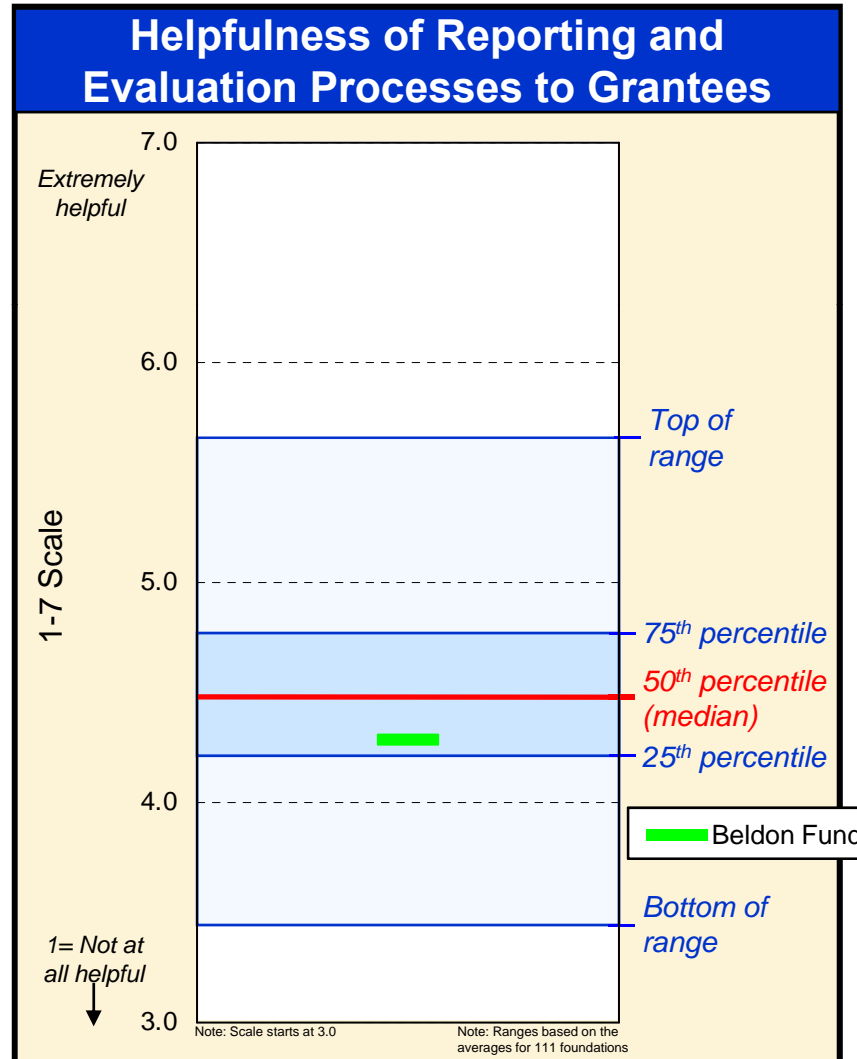


Note: This chart includes data about 111 foundations, with the exception of "email correspondence" which includes data about 69 foundations.

Helpfulness of Reporting and Evaluation Processes

On helpfulness of the Fund's reporting/evaluation process in strengthening the grantee, Beldon is rated:

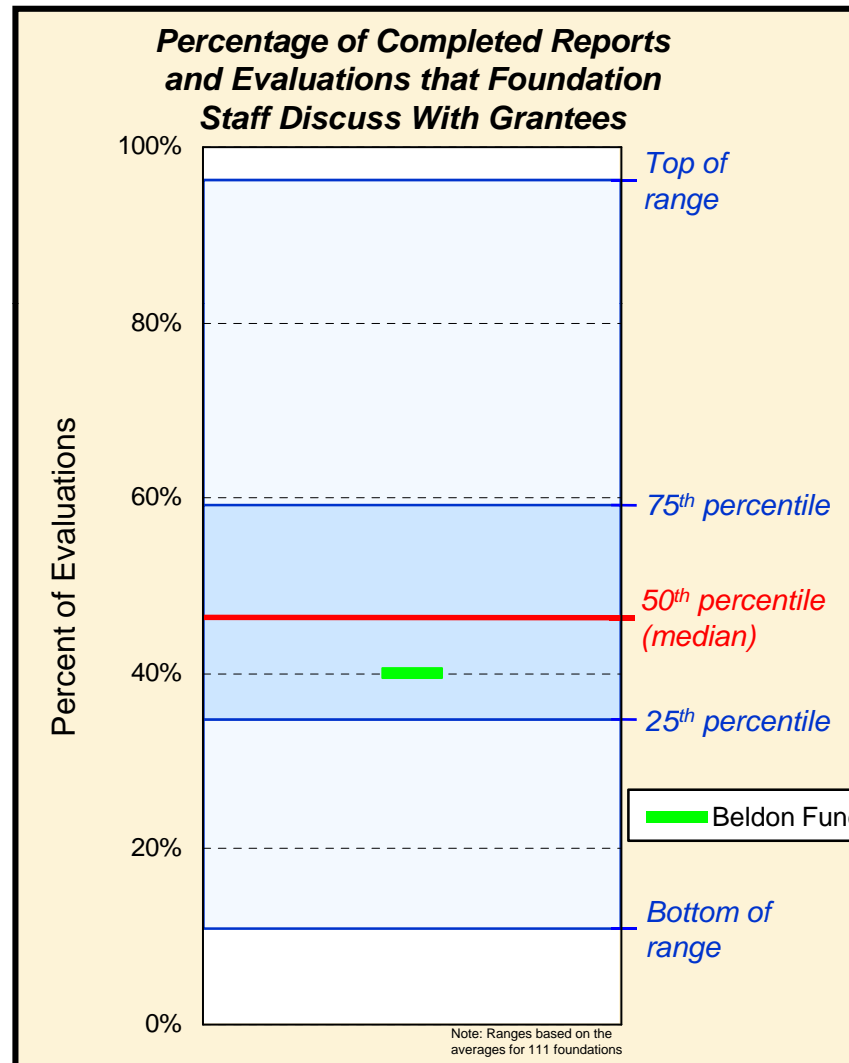
- below the median foundation



Reporting and Evaluation Processes

The proportion of Beldon grantees that reported discussing their completed reports or evaluations with Foundation staff is:

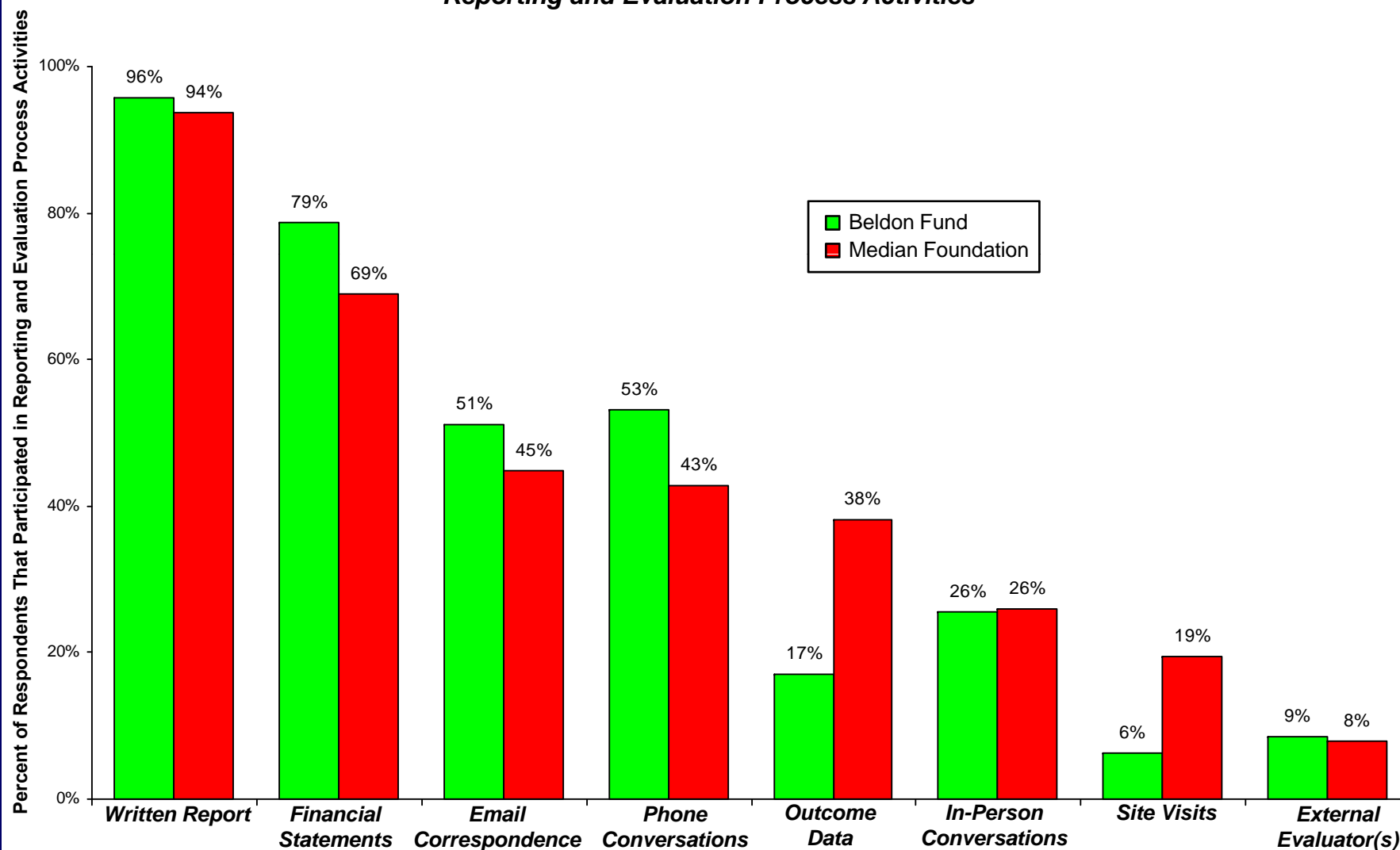
- similar to that of the median foundation



Reporting and Evaluation Process Activities

Beldon grantees more frequently report engaging in phone conversations and email correspondence with Fund staff than is typical.

Reporting and Evaluation Process Activities

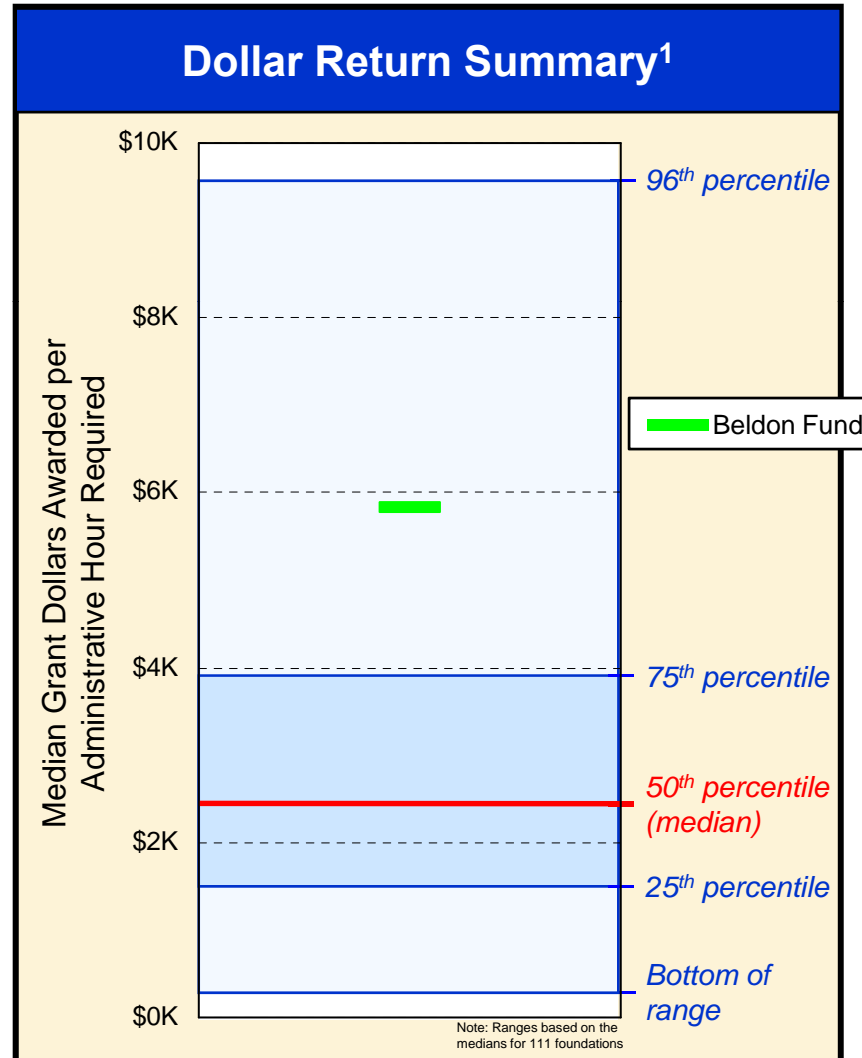


Note: This chart includes data about 111 foundations, with the exception of "email correspondence" which includes data about 69 foundations.

Dollar Return Summary

This summary measure shows the total grant dollars awarded relative to the total time necessary to fulfill the Fund's administrative requirements over the lifetime of the grant. At the median, the number of dollars awarded per hour of administrative time spent by Beldon grantees is:

- greater than that of ninety percent of surveyed foundations



¹: Dollar Return on Grantee Administrative Hours is calculated for each grantee and aggregated by foundation for the Dollar Return Summary. Chart does not show data from four foundations whose Dollar Return on Grantee Administrative Hours exceeds \$10K.

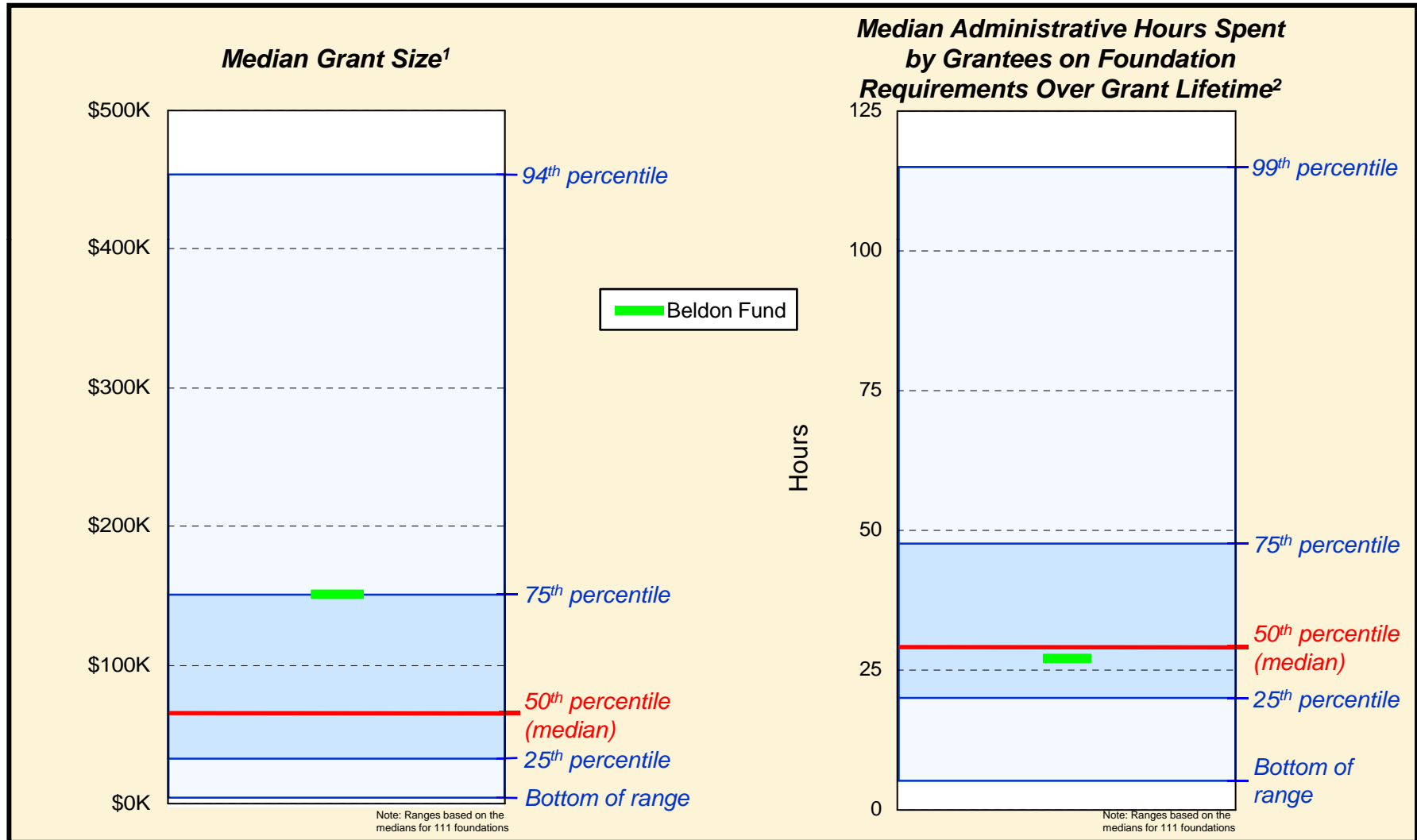
Grant Size and Administrative Time

At the median, the grant size reported by Beldon grantees is:

- larger than that of the median foundation

At the median, the number of hours of administrative time spent by Beldon grantees during the course of the grant is:

- similar to the time spent by grantees of the median foundation



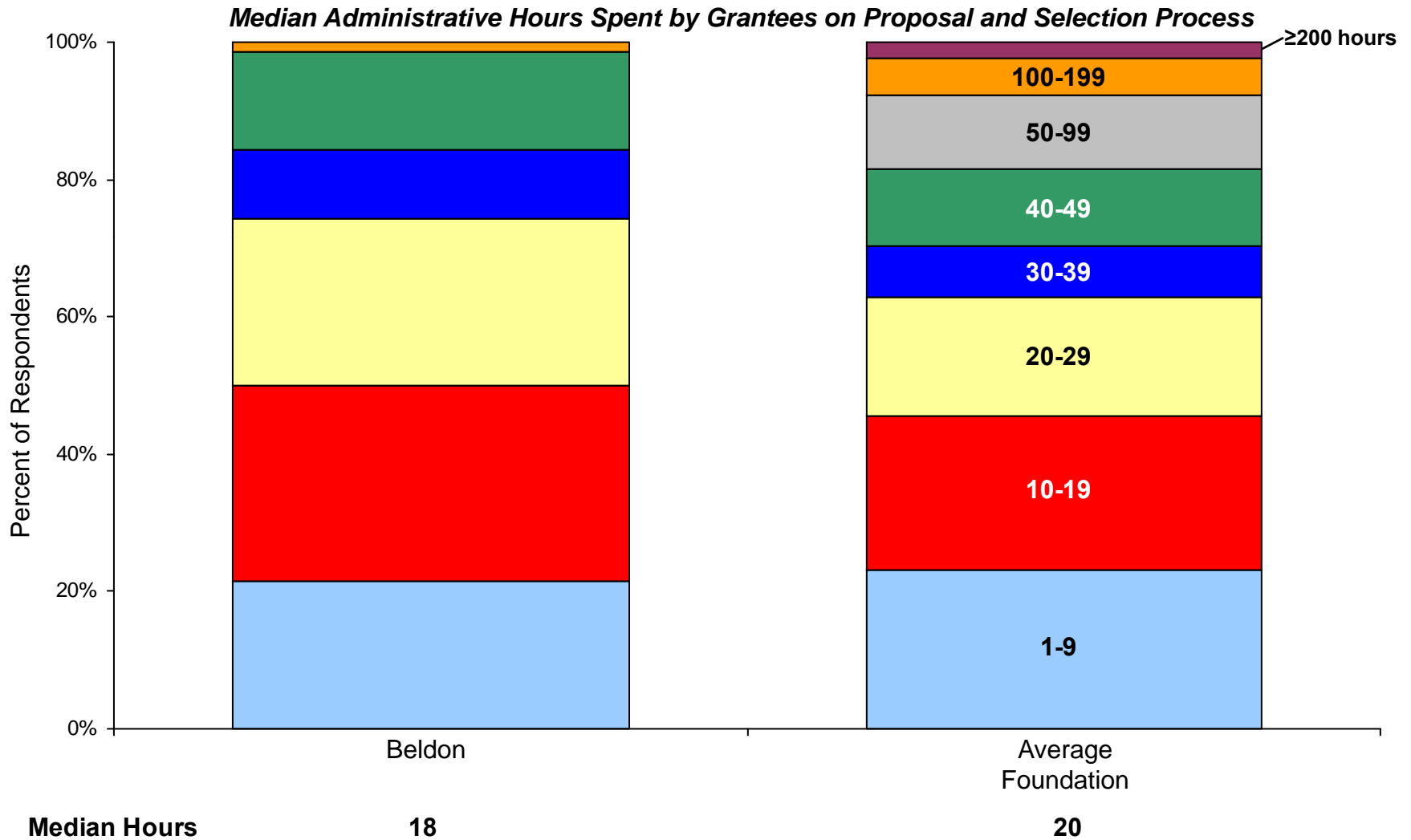
1: Chart does not show data from seven foundations whose median grant size exceeds \$500K.

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

Administrative Time – Proposal and Selection Process

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

- similar to the time spent by grantees of the median foundation

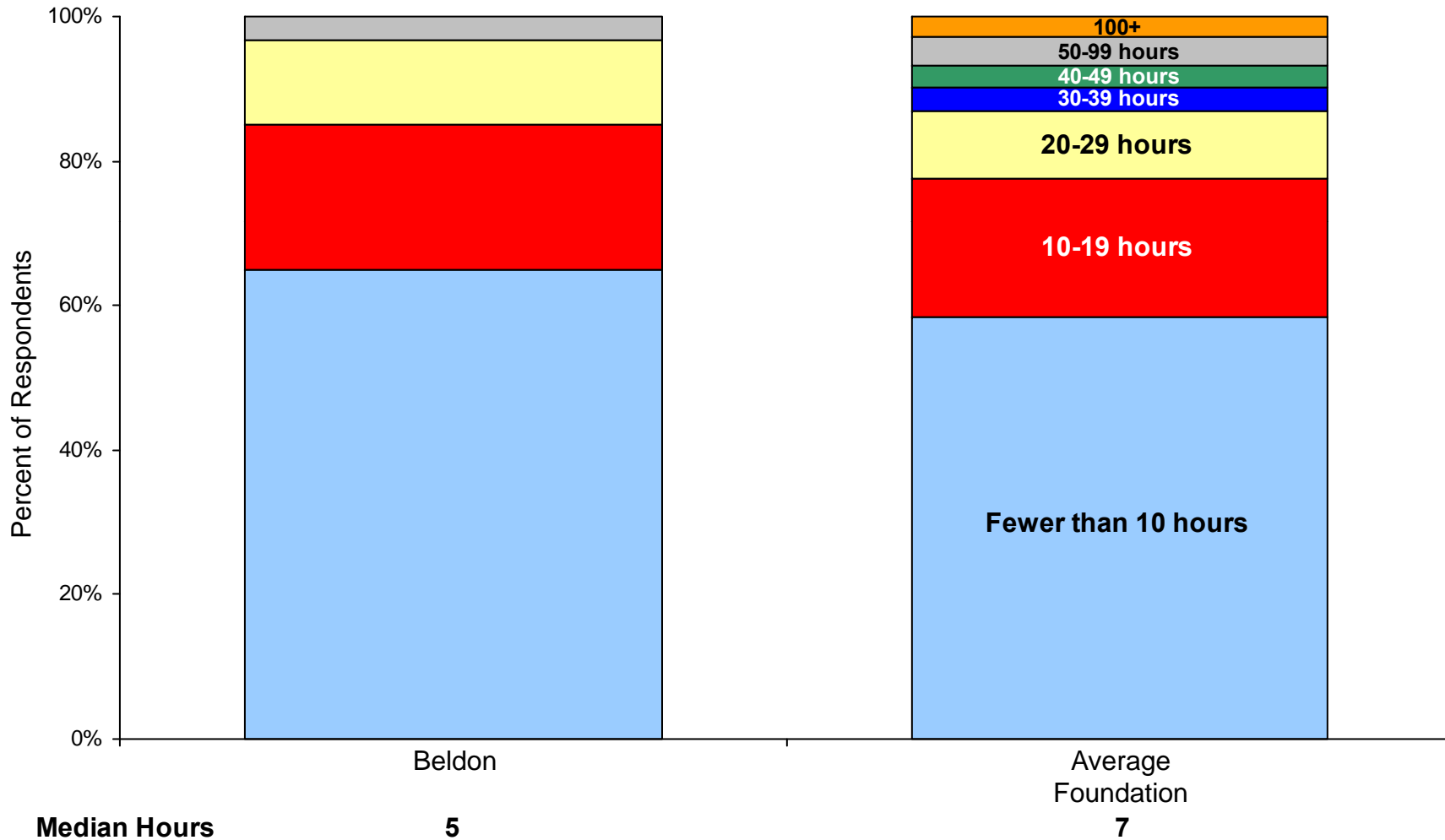


Administrative Time – Reporting and Evaluation Processes

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

- similar to than the time spent by grantees of the median foundation

Median Administrative Hours Spent by Grantees on Monitoring, Reporting, and Evaluation Processes (Annualized)¹



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

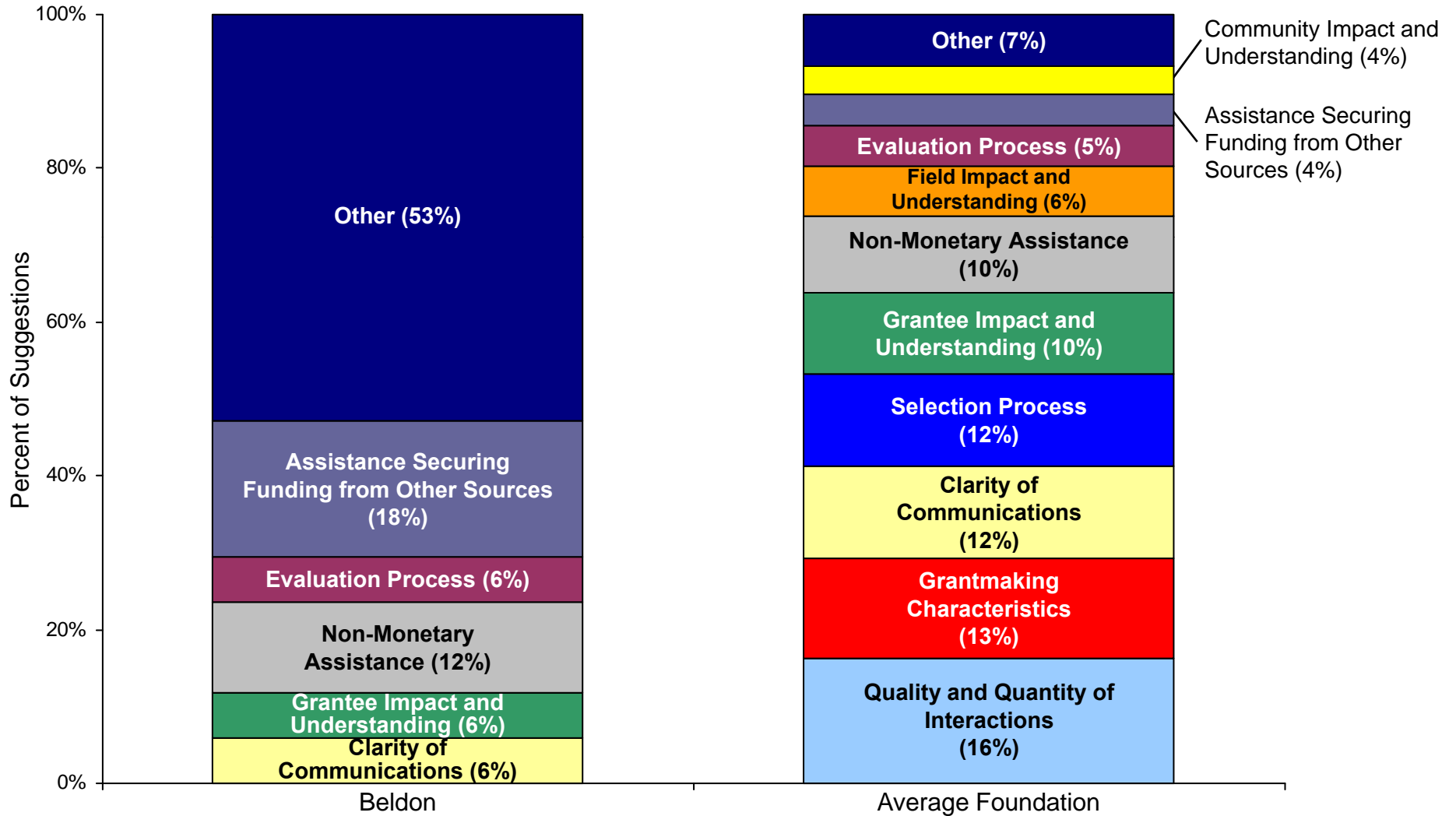
Contents

I.	Introduction	2
II.	External Orientation	
	a) Field-Focused Measures	7
	b) Community-Focused Measures	10
	c) Effectiveness in Creating Social Impact	12
III.	Impact on Grantee Organizations	14
IV.	Satisfaction	20
V.	Interactions	23
VI.	Communication	30
VII.	Assistance Beyond the Grant Check	
	a) Management and Field-Related Assistance	36
	b) Assistance Securing Funding from Other Sources	42
VIII.	Grant Processes and Administration	
	a) Selection Process	48
	b) Reporting and Evaluation Processes	54
	c) Dollar Return on Grantee Administrative Hours	57
IX.	Grantee Suggestions for the Foundation	62
X.	Review of Findings and Analysis and Discussion	65
 <u>Appendix</u>		
A.	Grantmaking/Grantee Characteristics	68
B.	Excerpt of Operational Benchmarking Report (OBR)	84
C.	List of Foundations in Dataset	91
D.	About the Center for Effective Philanthropy	94

Grantee Suggestions for the Foundation (1)

Grantees were asked to provide any suggestions for how the Fund could improve. A larger than typical proportion of Beldon's suggestions concern assistance securing funding from other sources.

Topics of Grantee Suggestions



Note: This chart includes data about 111 foundations. There were a total of 17 grantee suggestions for Beldon.

Grantee Suggestions for the Foundation (2)

Beldon grantees made a total of 17 suggestions for the Fund's improvement.

Topic of Grantee Suggestion	% of Beldon Grantee Suggestions	% Average Foundation Suggestions	Beldon Grantee Suggestions
Assistance Securing Funding From Other Sources	18%	5%	"It would be useful to introduce past grantees to potential new funders." "Helping us connect with other foundations would have been helpful." "An earlier emphasis and funding encouragement around the development of small, internet donor strategies would have been great to see."
Non-Monetary Assistance	12%	10%	"More focus on the difficulties of building multiracial coalitions and building those bridges between organizations and individuals – Beldon cannot do everything, but many of the organizations it supports need strengthening in this area, and leadership from the Fund could really help them a great deal." "I think the longest lasting feeling I've had in all of our interactions with the Fund, both as an individual organization, and as a member of Beldon supported collaborations, is that you can't always force a collaboration or impose a structure for such collaborations, even if it seems to make the most sense from some perspectives."
Clarity of Communications	6%	12%	"Working the ideas and importance of shared services among voter and civic engagement groups into the ideas and materials of Beldon would have helped us communicate our work better to others."
Grantee Impact and Understanding	6%	10%	"Trust the leadership of the organization, rather than related consultants."
Evaluation Process	6%	5%	"We weren't thrilled to have to deal with third-party consultants evaluating our grant. We felt like there were too many phone calls with the consultant and program staff, which inevitably led to more work for us in revamping the proposal. The consultant felt too hands-on."
Other	53%	7%	<u>Don't spend down:</u> "Don't close shop and keep going." "My only regret is that this funder is sunseting leaving a major void in the field of environmental health and justice funders as well as the programmatic leadership provided by ... Beldon [staff]. An improvement would be to keep going!" I would only ask that the Fund consider extending its philanthropy into the next decade to fund strategic environmental enforcement opportunities when they arise." <u>Educate other funders:</u> "Make sure to capture the best stories and share with key funders." "I would love to see an analysis of the impact the foundation was attempting to make and how well they did it. Lastly, what lessons they learned from that analysis and a strategy to share those lessons with others." "Keeping an open mind to new ideas/approaches."

Contents

I.	Introduction	2
II.	External Orientation	
	a) Field-Focused Measures	7
	b) Community-Focused Measures	10
	c) Effectiveness in Creating Social Impact	12
III.	Impact on Grantee Organizations	14
IV.	Satisfaction	20
V.	Interactions	23
VI.	Communication	30
VII.	Assistance Beyond the Grant Check	
	a) Management and Field-Related Assistance	36
	b) Assistance Securing Funding from Other Sources	42
VIII.	Grant Processes and Administration	
	a) Selection Process	48
	b) Reporting and Evaluation Processes	54
	c) Dollar Return on Grantee Administrative Hours	57
IX.	Grantee Suggestions for the Foundation	62
X.	Review of Findings and Analysis and Discussion	65
<u>Appendix</u>		
A.	Grantmaking/Grantee Characteristics	68
B.	Excerpt of Operational Benchmarking Report (OBR)	84
C.	List of Foundations in Dataset	91
D.	About the Center for Effective Philanthropy	94

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	[Progress bar with diamond at 100th]					Grantees were asked to rate the foundation's impact on their fields.
Impact on the Community	[Progress bar with diamond at 25th]					Grantees were asked to rate the foundation's impact on their local communities.
Overall Effectiveness in Creating Social Impact	[Progress bar with diamond at 85th]					Grantees were asked to rate the foundation's overall effectiveness in creating social impact.
Impact on the Grantee Organization	[Progress bar with diamond at 75th]					Grantees were asked to rate the foundation's impact on their organizations.
Satisfaction	[Progress bar with diamond at 50th]					Grantees were asked to rate their satisfaction with their funder.
Quality of Interactions	[Progress bar with diamond at 85th]					This summary includes grantee ratings of foundation fairness, responsiveness, and grantee comfort approaching the foundation if a problem arises.
Clarity of Communication of Goals and Strategy	[Progress bar with diamond at 85th]					Grantees were asked to rate the clarity of the foundation's communication of its goals and strategy.
Non-Monetary Assistance	[Progress bar with diamond at 60th]					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	[Progress bar with diamond at 95th]					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	[Progress bar with diamond at 50th]					Grantees were asked to rate the helpfulness of the foundation's selection process for their organizations.
Reporting and Evaluation Processes	[Progress bar with diamond at 30th]					Grantees were asked to rate the helpfulness of the foundation's reporting and evaluation processes for their organizations.
Dollar Return on Grantee Administrative Hours	[Progress bar with diamond at 85th]					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.

Analysis and Discussion

Opportunities for Communication and Teaching

- ♦ As Beldon Fund spends down, it may want to consider how it communicates its strategy, challenges, and successes with other funders.
 - Grantees rate the Fund very positively on a variety of measures including measures related to its impact on grantees' fields, the clarity of its communications, and its impact on and understanding of their organizations.
 - Grantees perceive the Fund as having spent down its assets very responsibly.
 - The Fund is rated as positively as typical for its impact on grantees' ability to sustain their work in the future.
 - When asked to comment on how Beldon has helped their organizations plan for the sustainability of their Beldon-funded work, the majority of grantees indicated that Beldon has worked hard to ensure that its spend down would not negatively impact its grantees: "Beldon staff worked hard to convince other funders to support the campaign" and "provided extremely helpful fundraising trainings ... that helped us prepare for their phase out." Very few mentioned missed opportunities to strengthen their organizations.
- » *To what extent has Beldon shared what it has learned from its tenure as a foundation with other funders?*
- » *Can Beldon share what it has learned while spending down its assets so that other foundations can learn from its experience?*
- ♦ The Fund has provided 84 percent of its grantees with assistance securing funding from other sources – the largest proportion in the comparative set. The median foundation in the comparative set provides only 22 percent of its grantees with this type of assistance. Overall the impact of this assistance is rated more positively than typical for it's impact on grantees' ability to secure funds from other sources.
 - » *Is there any advice the Fund would have for other foundations that may be trying to provide a large proportion of their grantees with assistance securing funding from other sources?*

Contents

I.	Introduction	2
II.	External Orientation	
	a) Field-Focused Measures	7
	b) Community-Focused Measures	10
	c) Effectiveness in Creating Social Impact	12
III.	Impact on Grantee Organizations	14
IV.	Satisfaction	20
V.	Interactions	23
VI.	Communication	30
VII.	Assistance Beyond the Grant Check	
	a) Management and Field-Related Assistance	36
	b) Assistance Securing Funding from Other Sources	42
VIII.	Grant Processes and Administration	
	a) Selection Process	48
	b) Reporting and Evaluation Processes	54
	c) Dollar Return on Grantee Administrative Hours	57
IX.	Grantee Suggestions for the Foundation	62
X.	Review of Findings and Analysis and Discussion	65

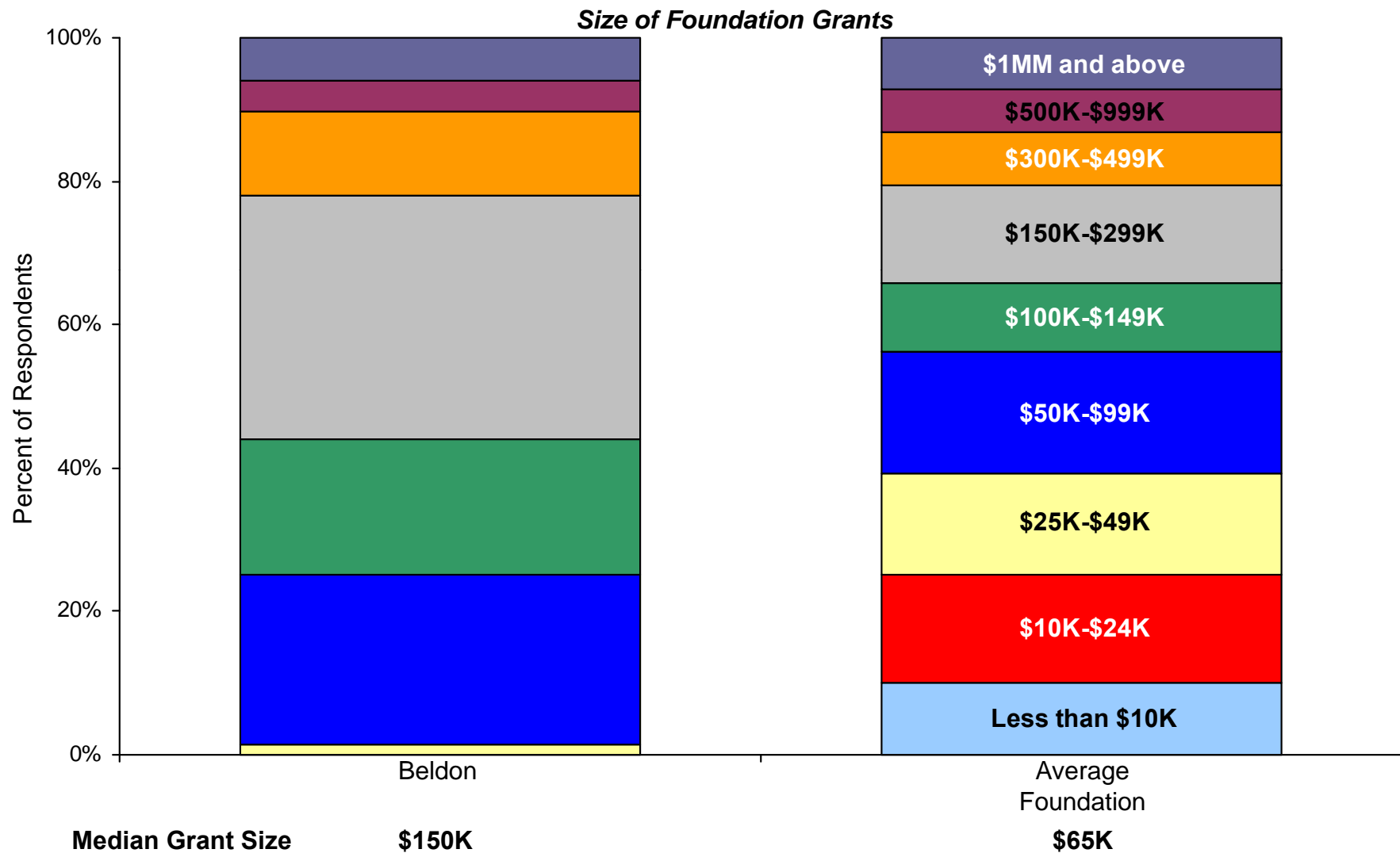
Appendix

A.	Grantmaking/Grantee Characteristics	68
B.	Excerpt of Operational Benchmarking Report (OBR)	84
C.	List of Foundations in Dataset	91
D.	About the Center for Effective Philanthropy	94

Grant Amount

At the median, the grant size reported by Beldon grantees is:

- larger than that of the median foundation



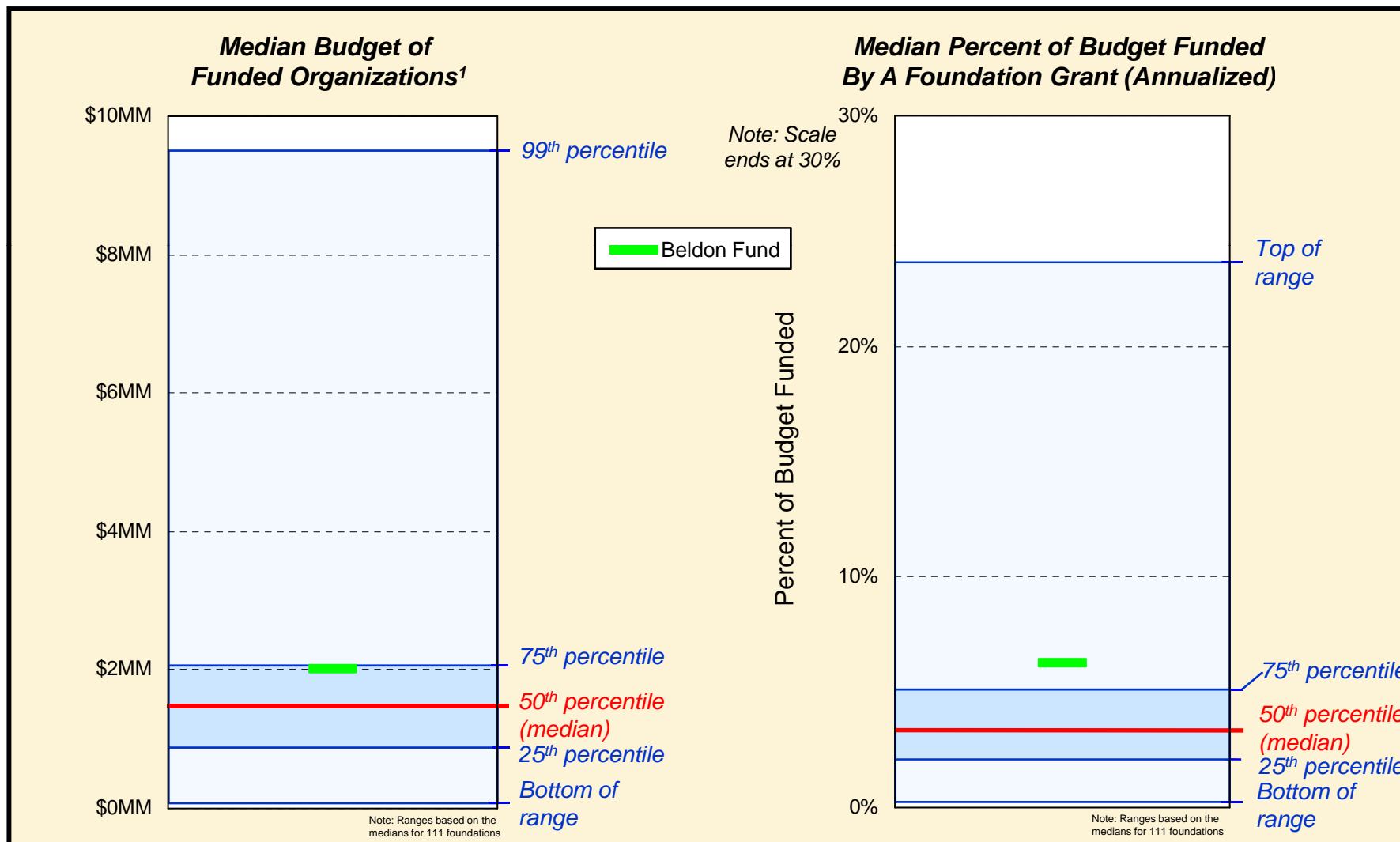
Size of Grantee Budget Relative to Size of Grant

The median budget of Beldon grantees is:

- larger than that of the median foundation

The median proportion of grantees' budgets funded by Beldon is:

- greater than that of the median foundation

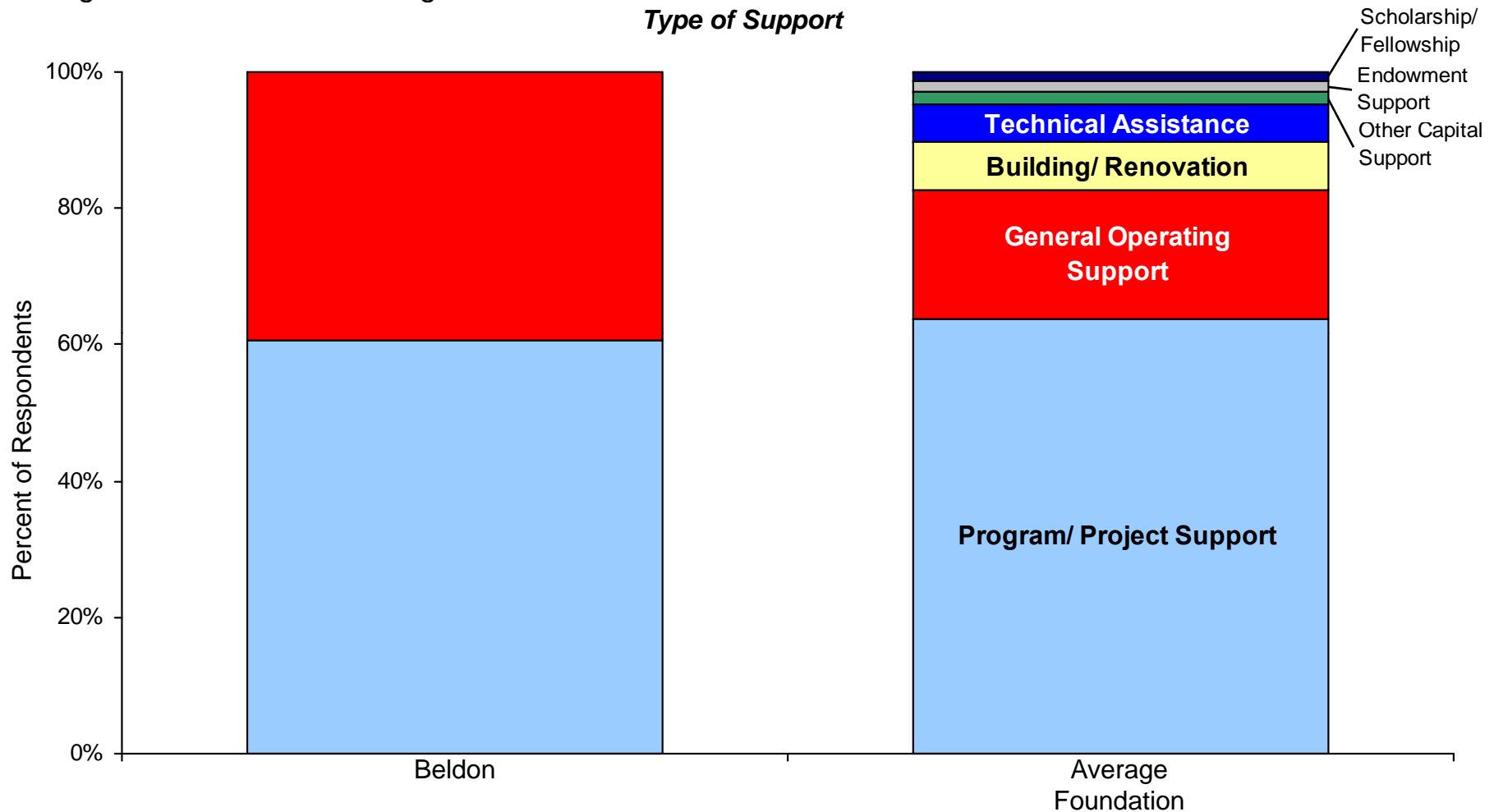


1: Chart range does not show one individual foundation median of more than \$10MM.

Type of Support

The proportion of Beldon grantees that were awarded a general operating support grant is:

- larger than that of the average foundation

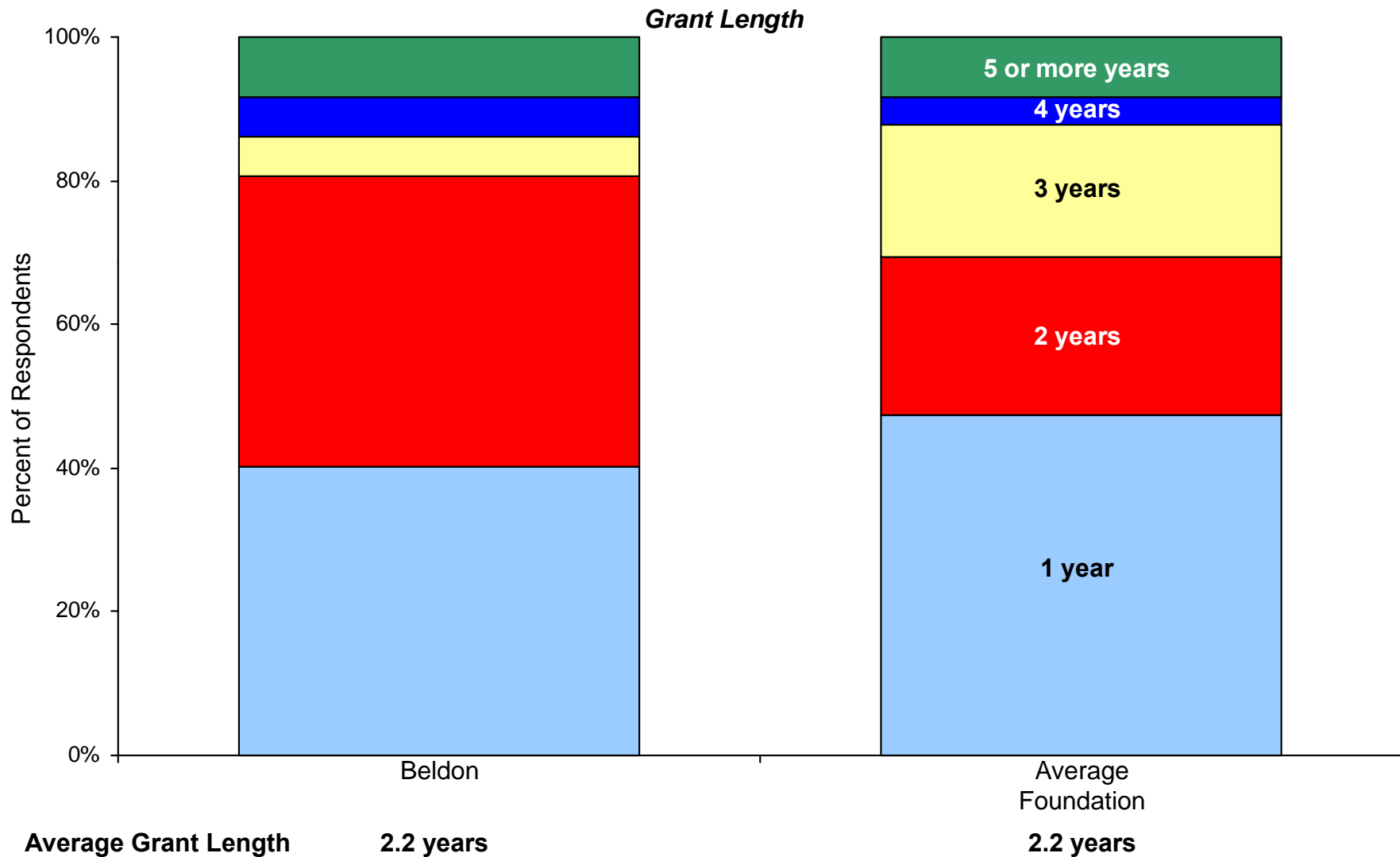


Survey-Wide Analysis Fact: By itself, type of grant awarded is not an important predictor of grantees' ratings of a foundation's impact on their organizations. However, ratings of impact on the grantee organization are higher for operating than program support grantees when those operating support grants are larger and longer term than what foundations typically provide. For more information on these findings, please see CEP's report, *In Search of Impact: Practices and Perceptions in Foundations' Provision of Program and Operating Grants to Nonprofits.*

Grant Length

The proportion of Beldon grantees that were awarded multi-year grants is:

- larger than that of the average foundation



Note: This chart includes data about 111 foundations. Grant lengths in chart are rounded to the nearest year.

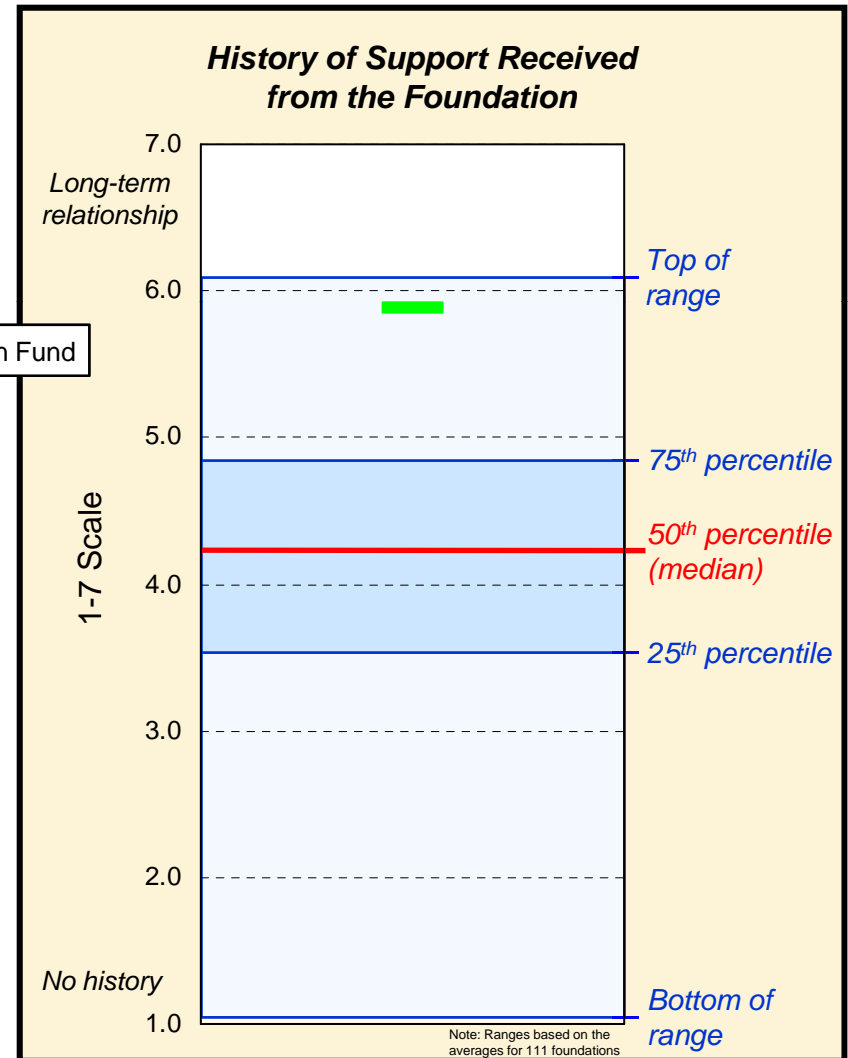
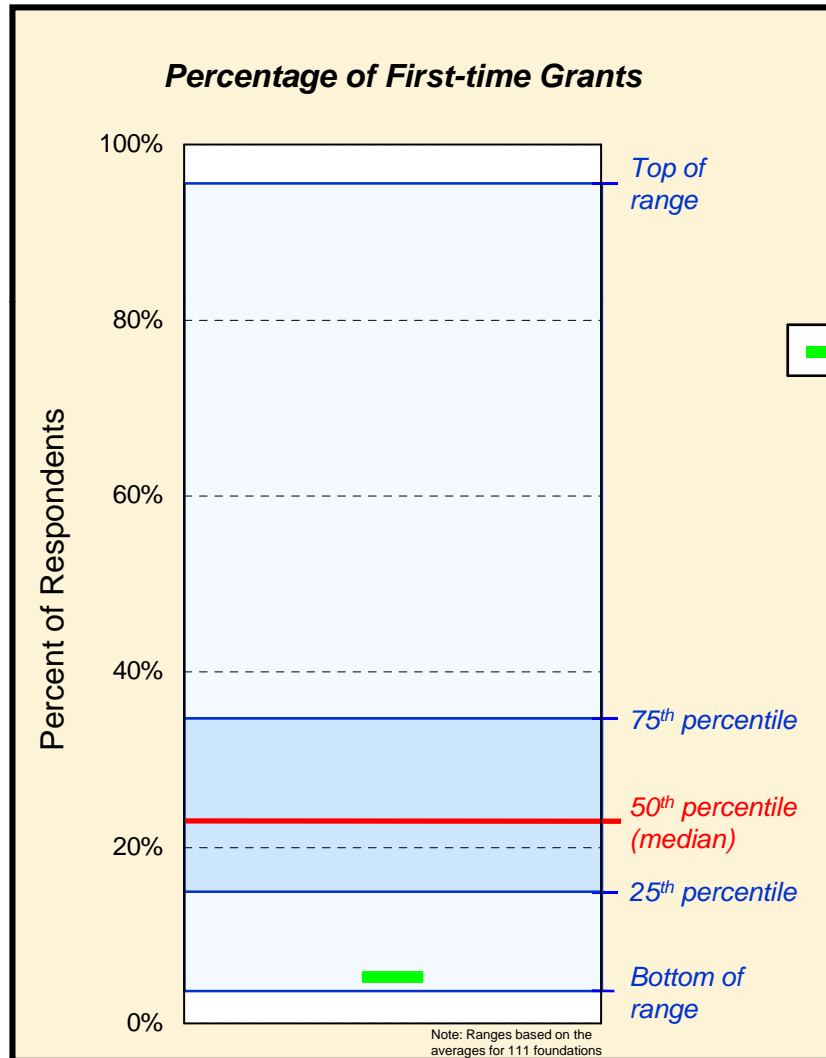
History of Foundation Support

The proportion of first-time grant recipients of Beldon is:

- smaller than that of ninety percent of surveyed foundations

The history of the support provided to grantees at Beldon is:

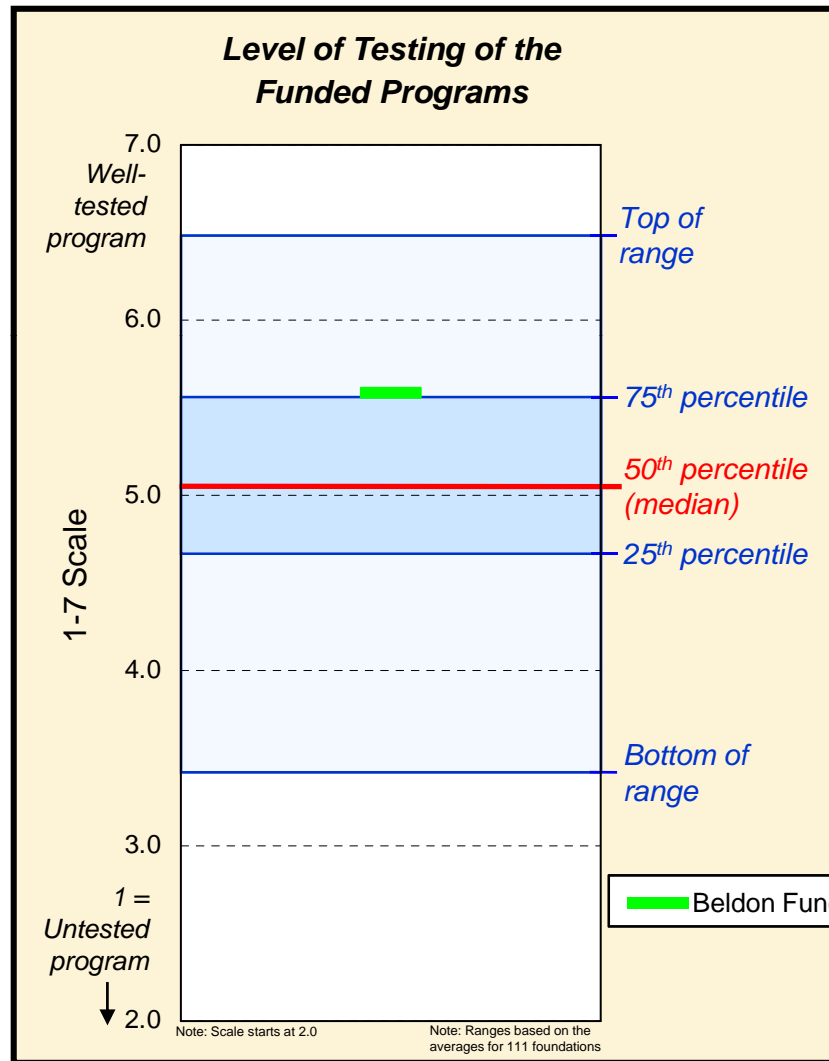
- longer than that of ninety percent of surveyed foundations



Level of Testing of Funded Programs

The average level of testing of programs funded by the Fund is:

- greater than that of the median foundation

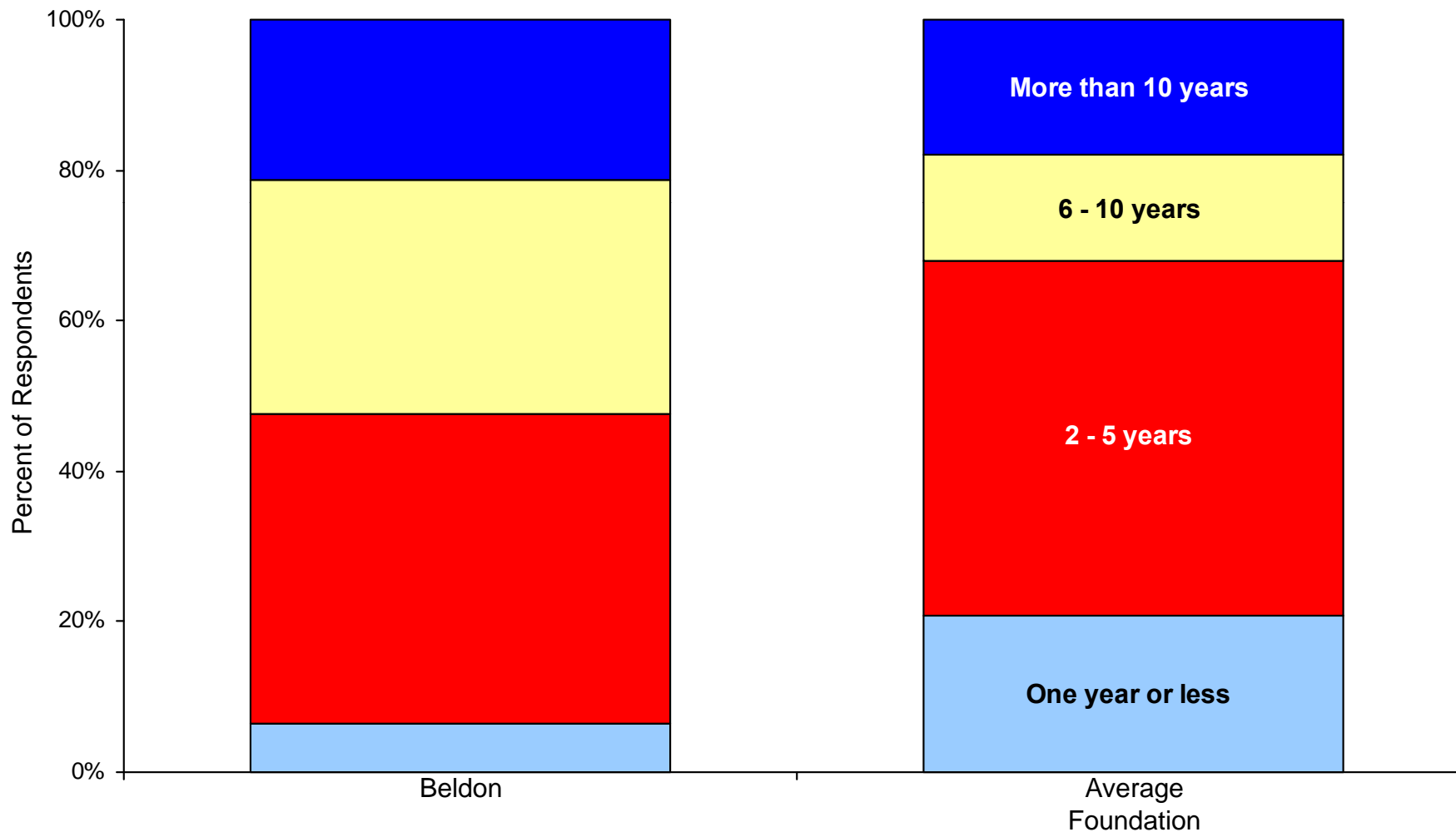


History of Funded Programs

The proportion of Beldon grantees that report having conducted funded programs for six years or more is:

- larger than that of the average foundation

Length of Time Which Grantees Have Regularly Conducted the Funded Programs

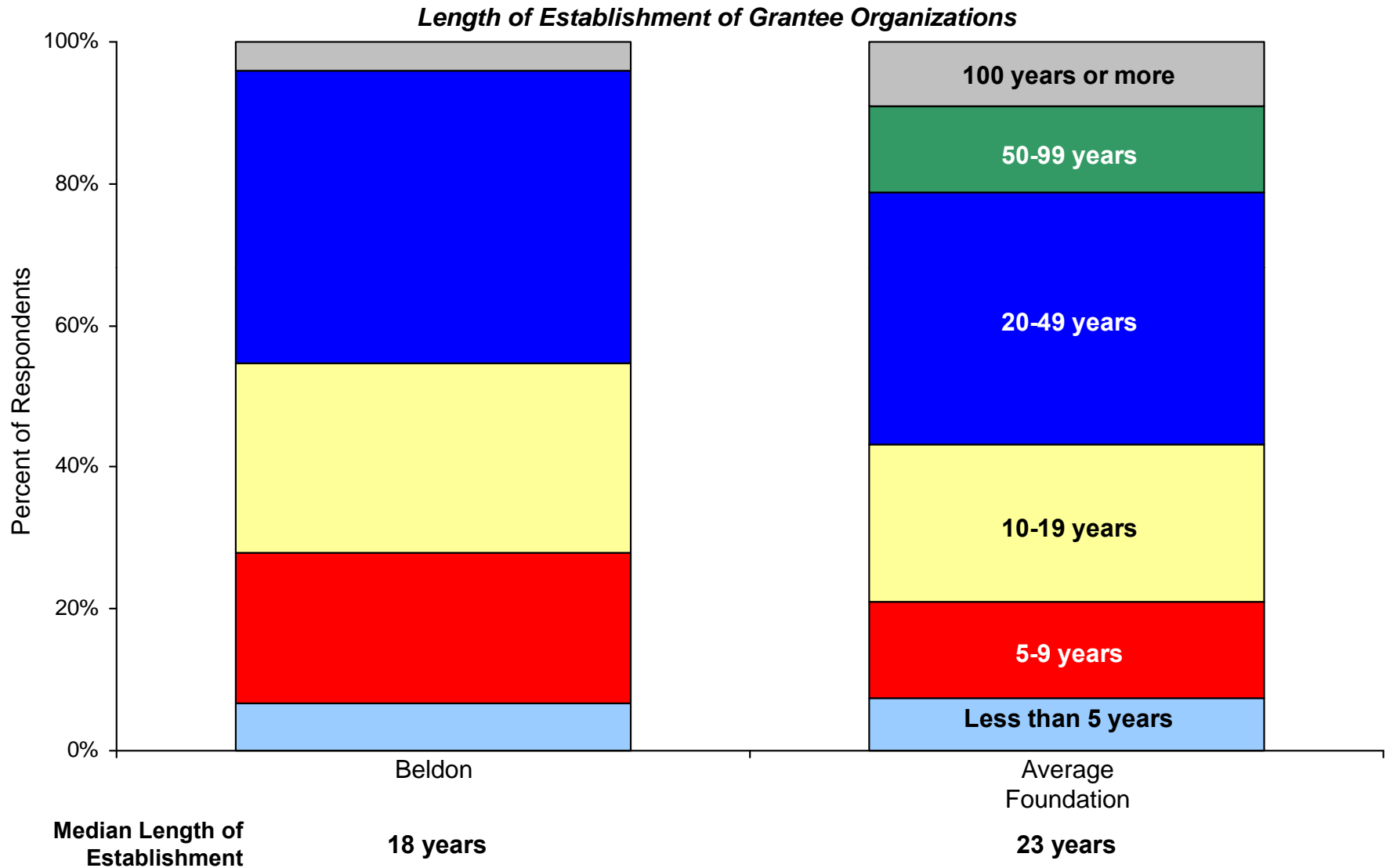


Note: This chart includes data about 17 foundations.

Length of Establishment of Grantee Organizations

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

- shorter than that of the median foundation

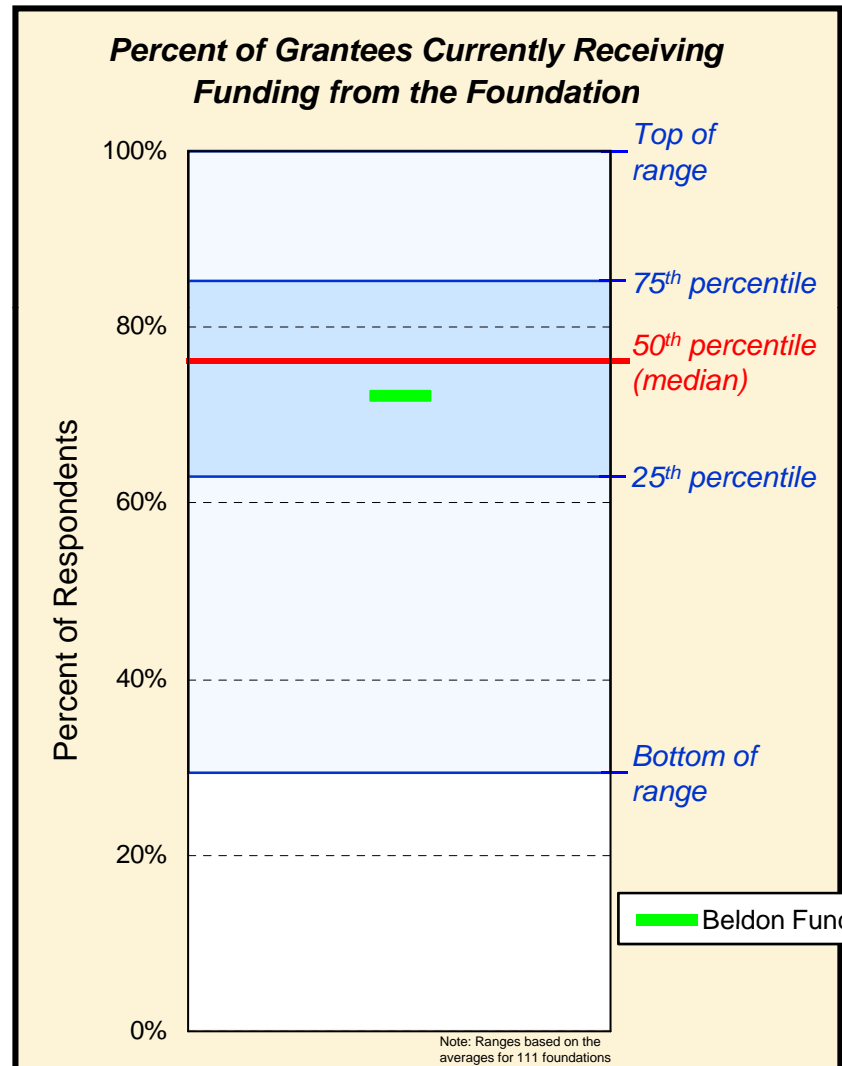


Note: This chart includes data about 111 foundations.

Funding Status

The proportion of Beldon grantees that were currently receiving funding at the time of the survey is:

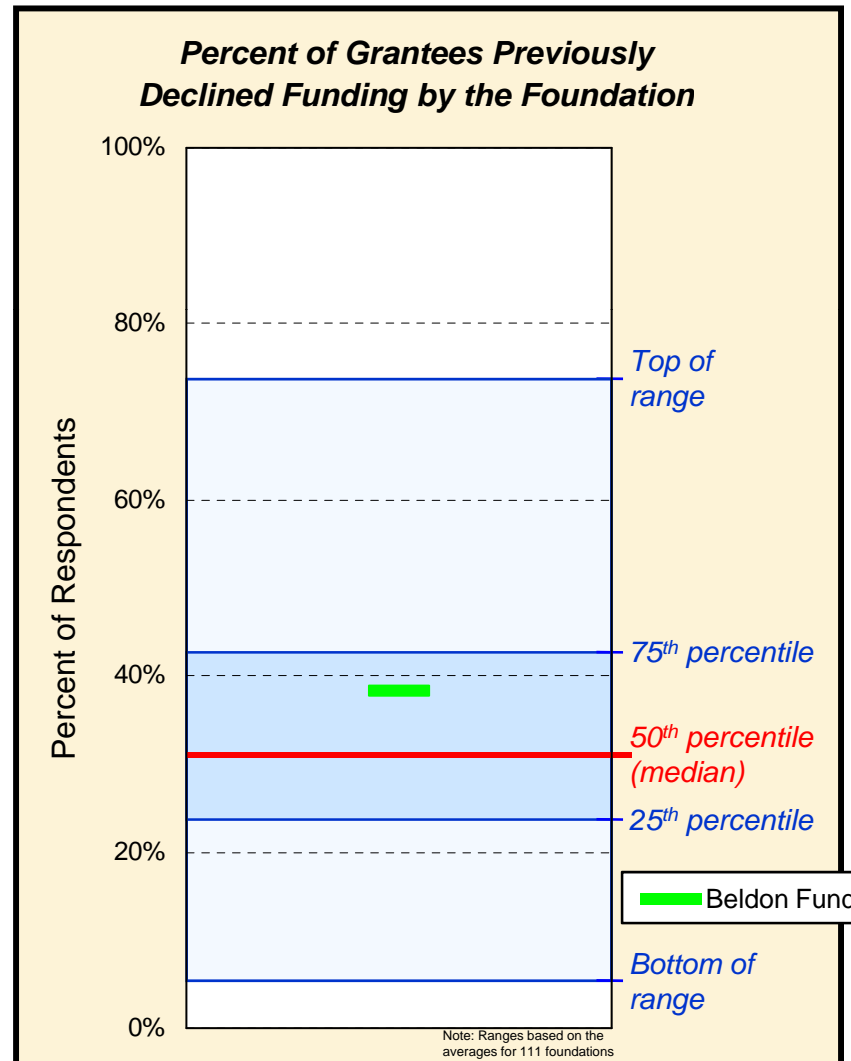
- similar to that of the median foundation



Grantees Previously Declined Funding

The proportion of Beldon grantees that had previously been declined funding from the Fund is:

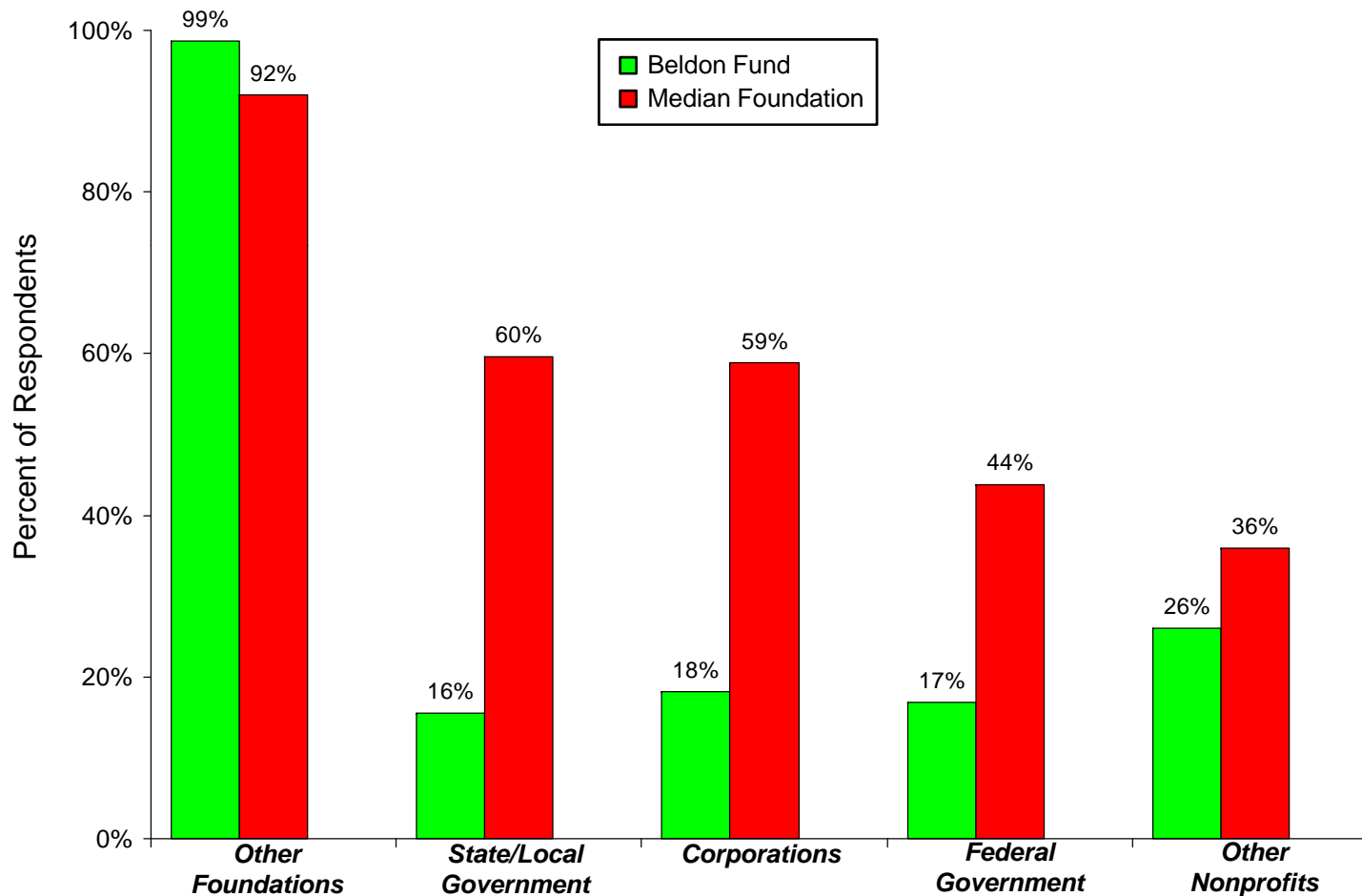
- larger than that of the median foundation



Other Sources of Grants

A smaller than typical proportion of Beldon grantees report receiving funding from state/local and federal governments and corporations.

Other Funding Sources Providing Grants

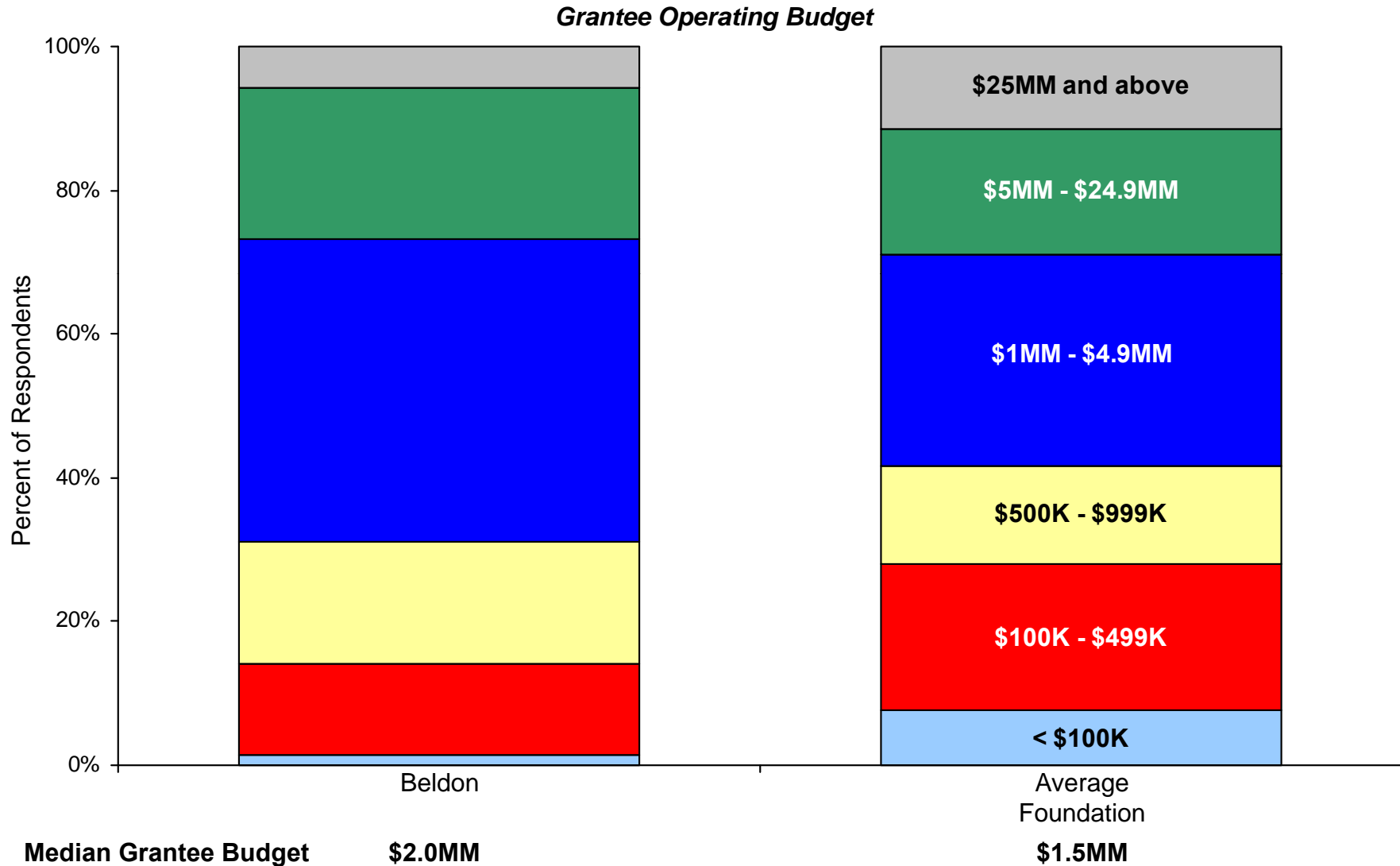


Note: This chart includes data about 111 foundations, with the exception of “corporations” and “other nonprofits” which both include data about 33 foundations.

Grantee Operating Budget

The median budget of Beldon grantees is:

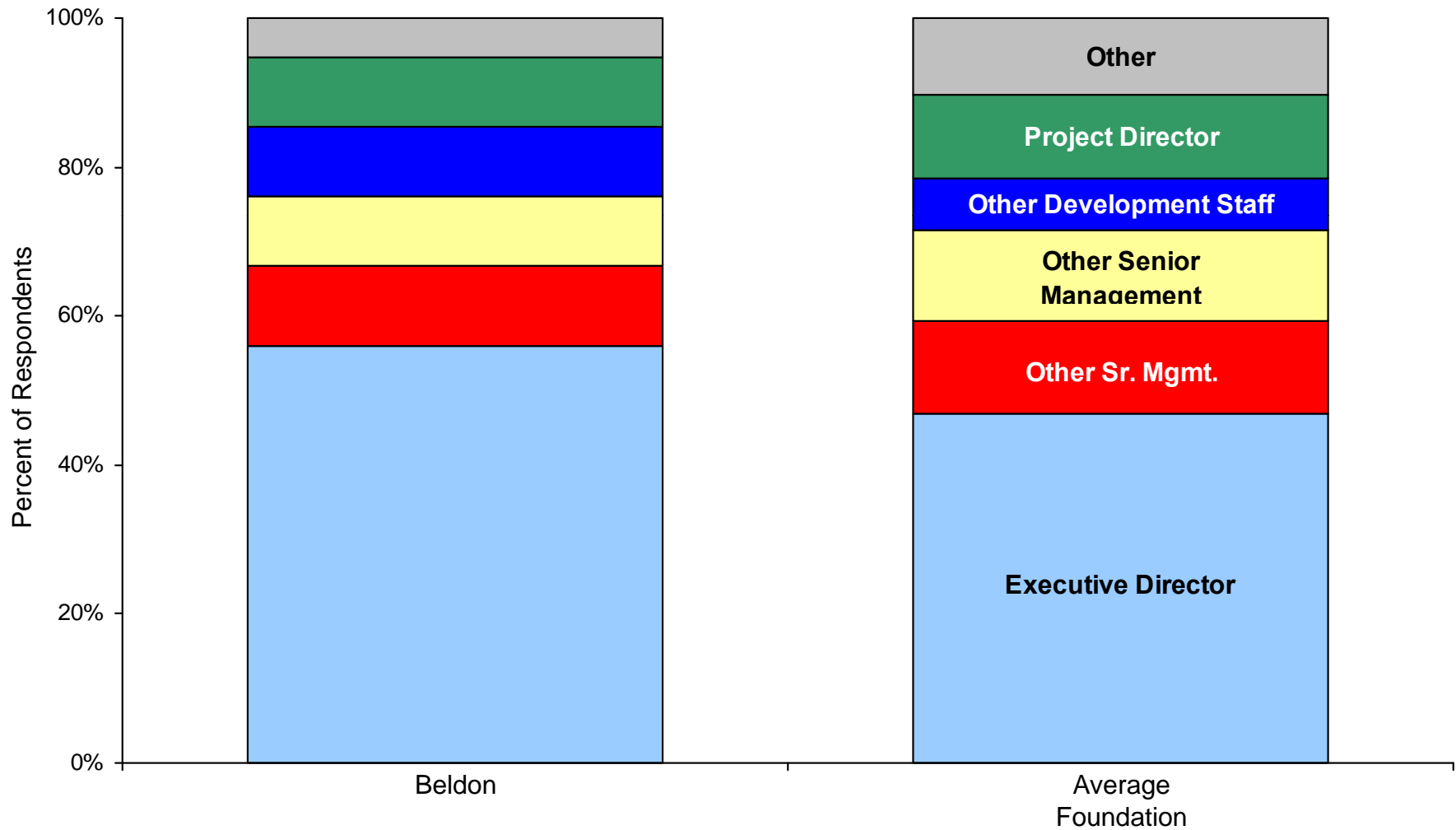
- larger than that of the median foundation



Note: This chart includes data about 111 foundations.

Job Title of Respondents

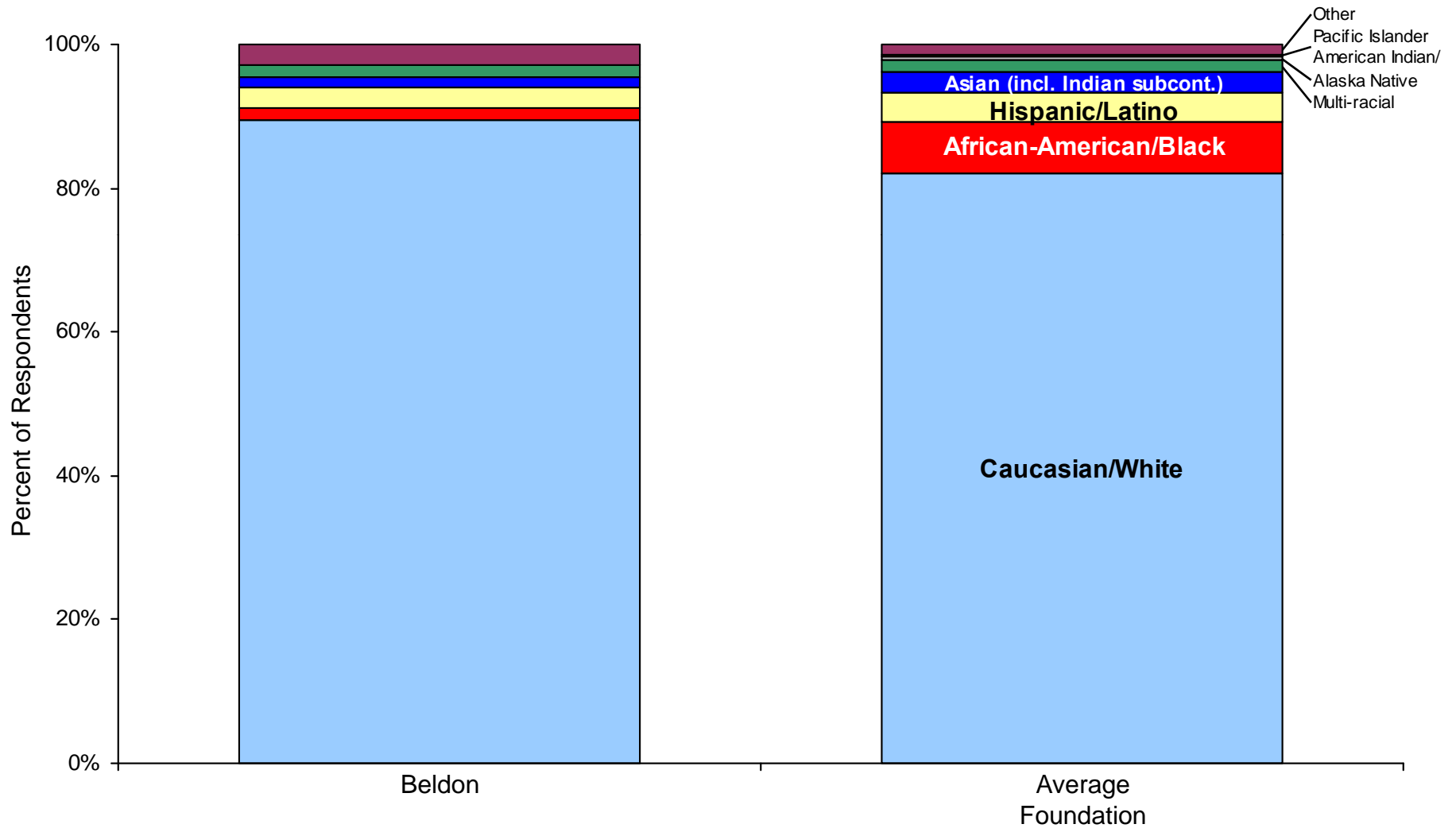
Job Title of Survey Respondents



Note: This chart includes data about 111 foundations.

Race/Ethnicity of Respondents

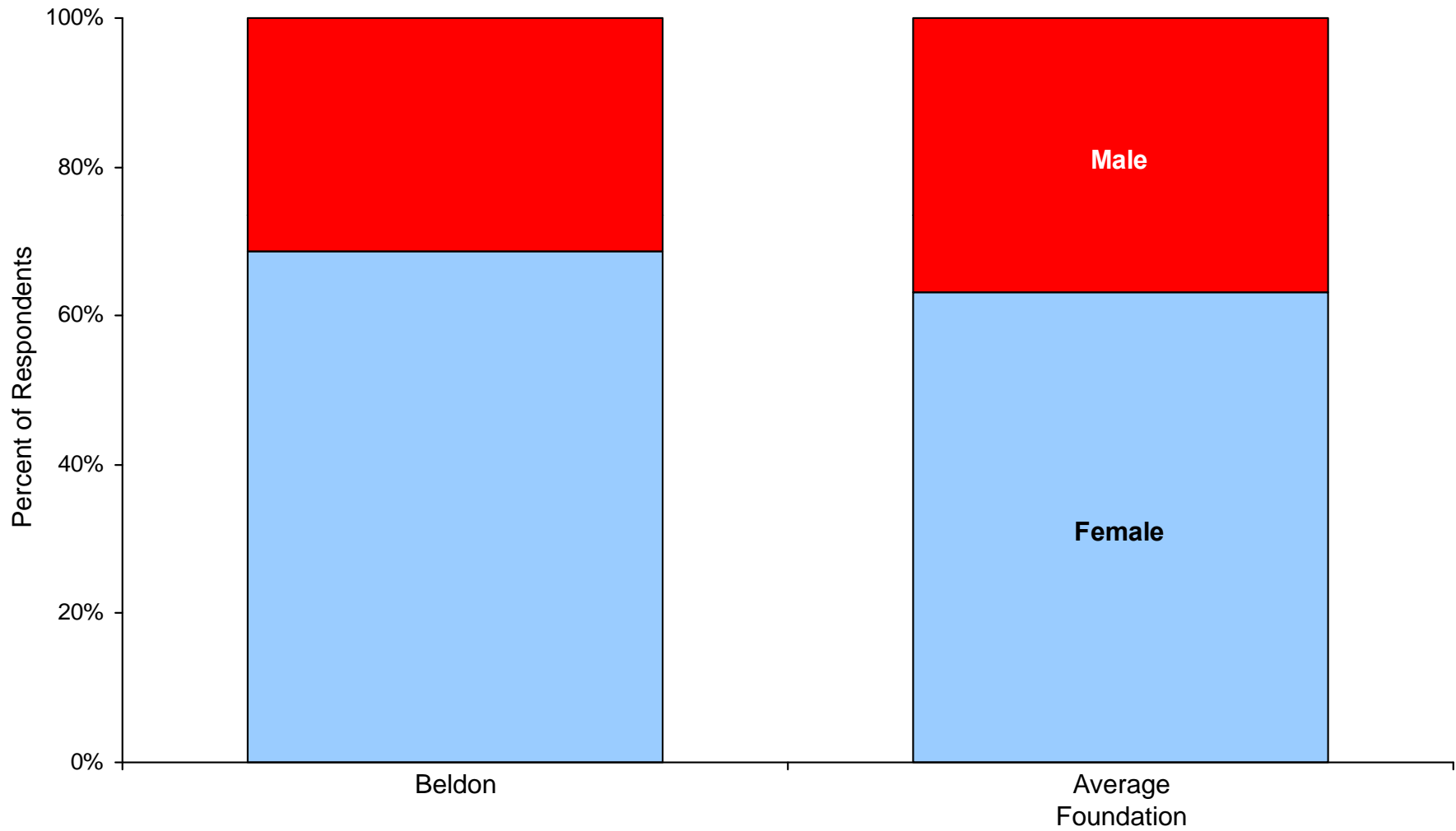
Race/Ethnicity of Survey Respondents



Note: This chart includes data about 54 foundations.

Gender of Respondents

Gender of Survey Respondents



Note: This chart includes data about 111 foundations.

Contents

I.	Introduction	2
II.	External Orientation	
	a) Field-Focused Measures	7
	b) Community-Focused Measures	10
	c) Effectiveness in Creating Social Impact	12
III.	Impact on Grantee Organizations	14
IV.	Satisfaction	20
V.	Interactions	23
VI.	Communication	30
VII.	Assistance Beyond the Grant Check	
	a) Management and Field-Related Assistance	36
	b) Assistance Securing Funding from Other Sources	42
VIII.	Grant Processes and Administration	
	a) Selection Process	48
	b) Reporting and Evaluation Processes	54
	c) Dollar Return on Grantee Administrative Hours	57
IX.	Grantee Suggestions for the Foundation	62
X.	Review of Findings and Analysis and Discussion	65
	<u>Appendix</u>	
A.	Grantmaking/Grantee Characteristics	68
B.	Excerpt of Operational Benchmarking Report (OBR)	84
C.	List of Foundations in Dataset	91
D.	About the Center for Effective Philanthropy	94

Excerpt of Operational Benchmarking Report (OBR) Operational Benchmarking Report Excerpt



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

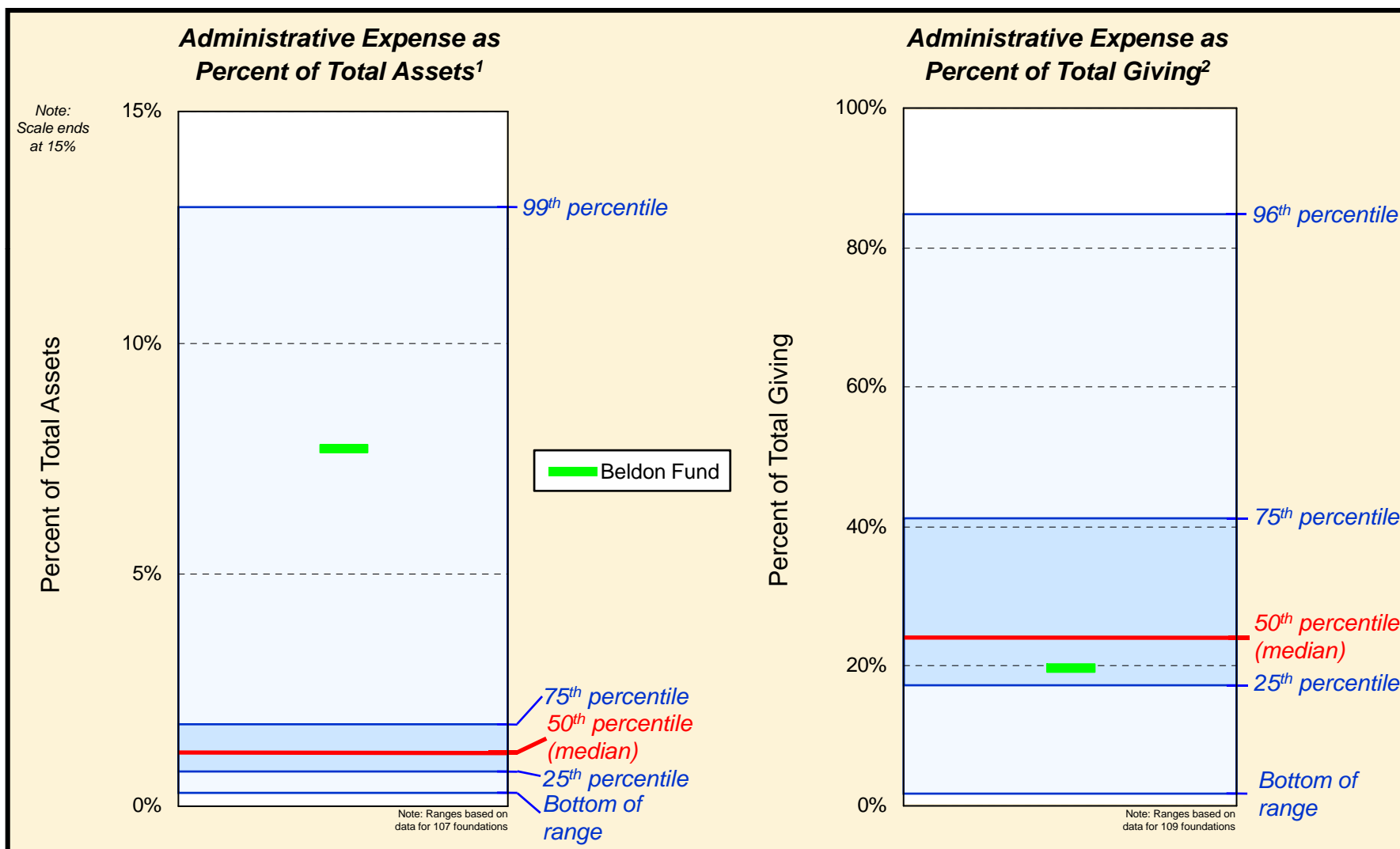
Total Administrative Expense

Beldon's administrative expenses as a proportion of its assets are:

- larger than those of ninety percent of surveyed foundations

Beldon's administrative expenses as a proportion of its giving are:

- similar to those of the median foundation



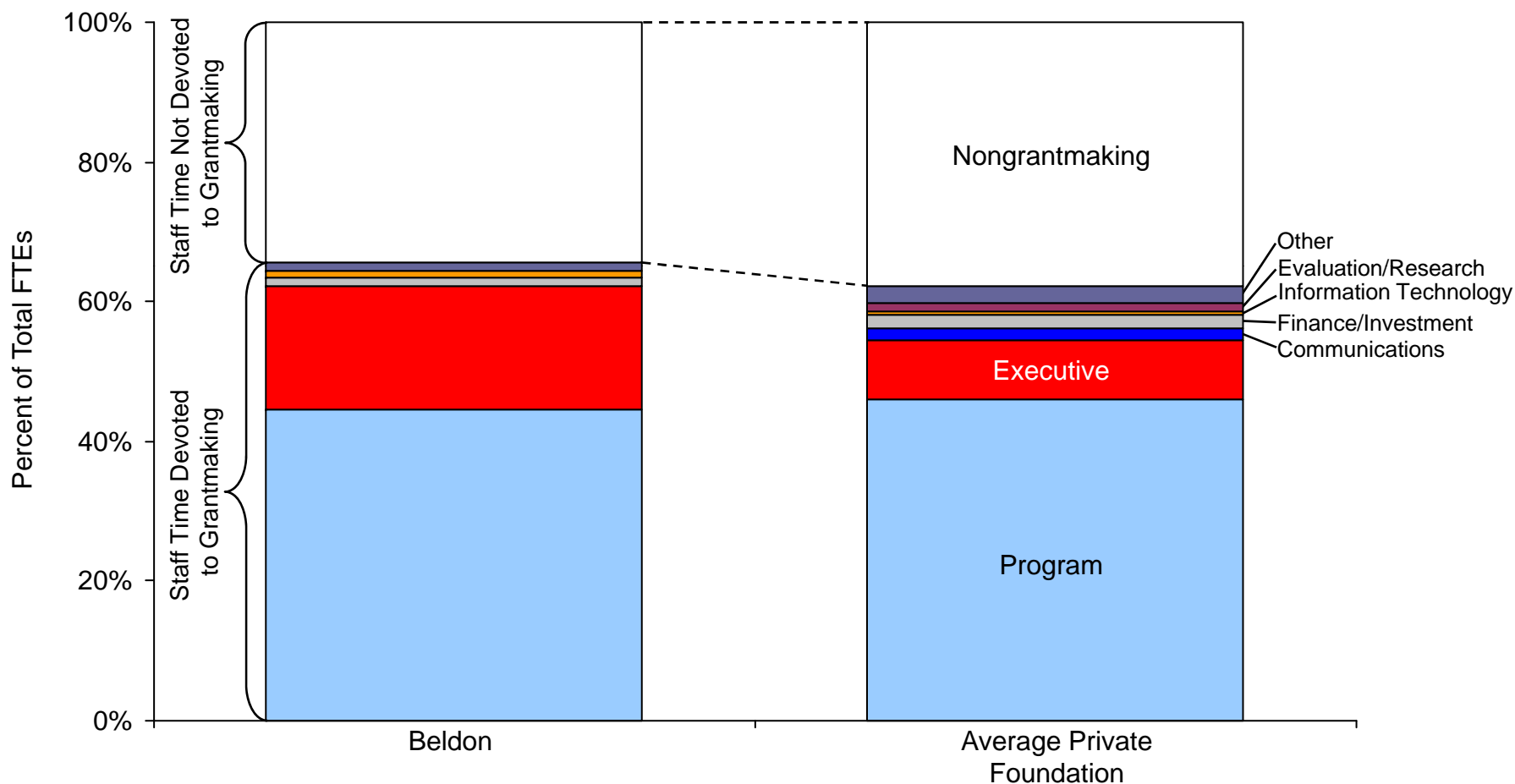
1: Total assets is in Box I on the 990-pf (line 21 on the 990), total administrative expense is line 24a (line 44a subtracting 22a on the 990), and total giving is line 25d (22a on the 990).

2: On the left-hand chart, one value over 15% is not shown. On the right-hand chart, four values over 100% are not shown.

Foundation Staffing

Beldon staff devote a similar proportion of their time to grantmaking compared to other foundation staffs in our sample.

Proportion of Staff Time Spent on Grantmaking vs. Nongrantmaking Activities



Proportion of Staff Time Devoted to Grantmaking

66%

62%

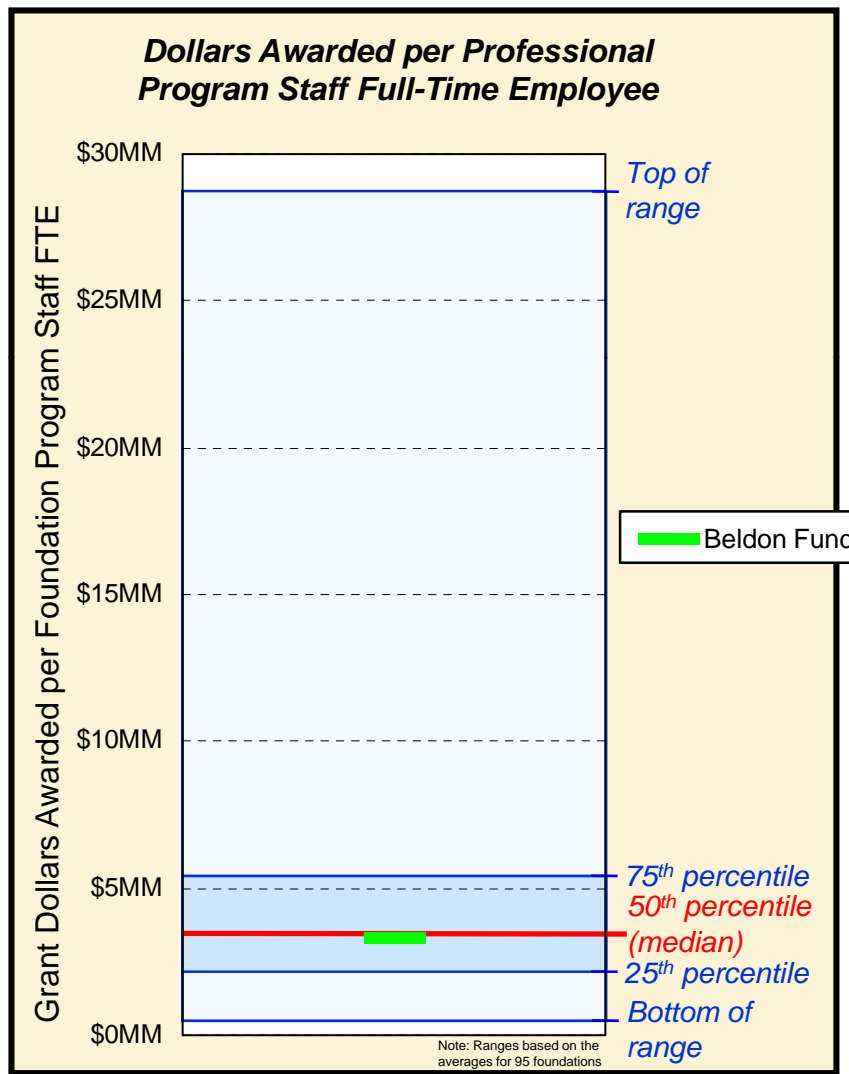
Note: Excludes FTEs devoted to the operation of foundation charitable programs. This chart includes data about 69 foundations.

Source: Self-reported data provided by Beldon and other GPR and Operational Benchmarking Report (OBR) subscribers from 2005-2008 survey rounds.

Staff to Giving Ratio

The number of dollars awarded per professional program staff full-time employee at Beldon is:

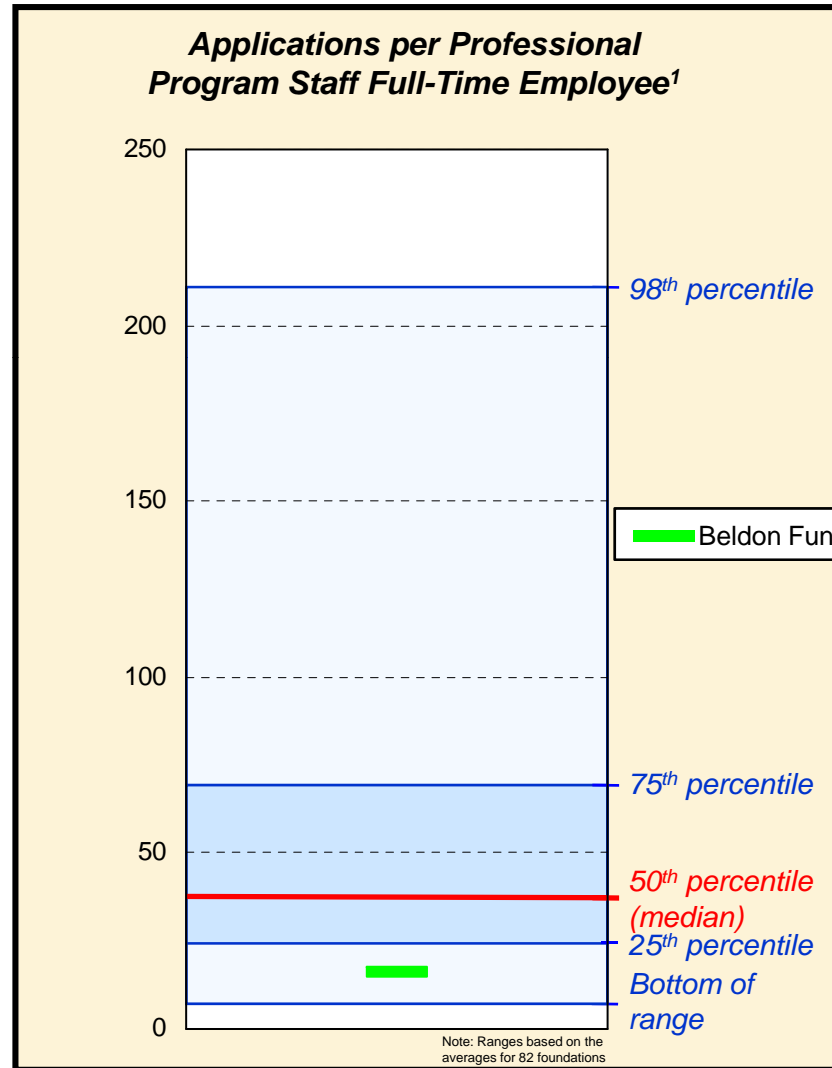
- similar to that of the median foundation



Program Staff Load (1)

The number of grant applications processed per professional program staff full-time employee at Beldon is:

- smaller than that of the median foundation



1: Two values over 250 are not shown.

Source: Self-reported data provided by Beldon and other GPR and Operational Benchmarking Report (OBR) subscribers from 2005-2008 survey rounds.

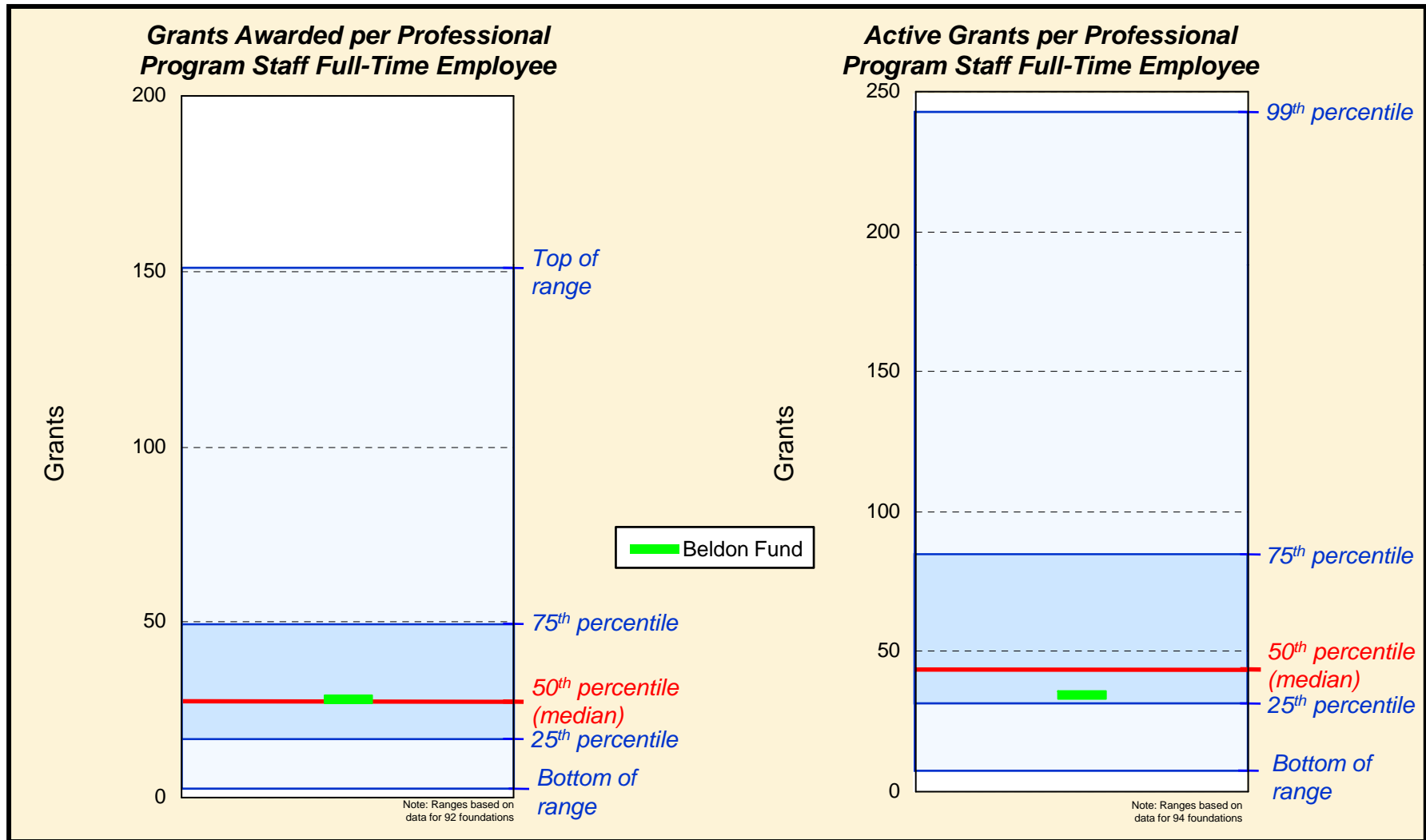
Program Staff Load (2)

The number of grants awarded per professional program staff full-time employee at Beldon is:

- similar to that of the median foundation

The number of active grants per professional program staff full-time employee at Beldon is:

- smaller than that of the median foundation



1: One value over 250 is not shown on the left-hand chart.

Source: Self-reported data provided by Beldon and other GPR and Operational Benchmarking Report (OBR) subscribers from 2005-2008 survey rounds.

Contents

I.	Introduction	2
II.	External Orientation	
	a) Field-Focused Measures	7
	b) Community-Focused Measures	10
	c) Effectiveness in Creating Social Impact	12
III.	Impact on Grantee Organizations	14
IV.	Satisfaction	20
V.	Interactions	23
VI.	Communication	30
VII.	Assistance Beyond the Grant Check	
	a) Management and Field-Related Assistance	36
	b) Assistance Securing Funding from Other Sources	42
VIII.	Grant Processes and Administration	
	a) Selection Process	48
	b) Reporting and Evaluation Processes	54
	c) Dollar Return on Grantee Administrative Hours	57
IX.	Grantee Suggestions for the Foundation	62
X.	Review of Findings and Analysis and Discussion	65
 <u>Appendix</u>		
A.	Grantmaking/Grantee Characteristics	68
B.	Excerpt of Operational Benchmarking Report (OBR)	84
C.	List of Foundations in Dataset	91
D.	About the Center for Effective Philanthropy	94

Foundations Included in Comparative Set (1)

The 111 foundations whose grantee ratings are included in the comparative set of this Grantee Perception Report are:

Adolph Coors Foundation	The David and Lucile Packard Foundation*
The Atlantic Philanthropies*	Dekko Foundation*
The Assisi Foundation of Memphis*	Doris Duke Charitable Foundation*
Barr Foundation*	The Duke Endowment*
Bill & Melinda Gates Foundation*	East Bay Community Foundation*
Beldon Fund*	The Educational Foundation of America*
Blandin Foundation*	Endowment for Health*
Blue Cross Blue Shield of Massachusetts Foundation*	The Erie Community Foundation*
Blue Shield of California Foundation*	Eugene and Agnes E. Meyer Foundation*
The Boston Foundation*	Evelyn and Walter Haas, Jr. Fund*
The Broad Foundation*	The Fan Fox and Leslie R. Samuels Foundation
The California Endowment*	France-Merrick Foundation
The Cannon Foundation	Gaylord and Dorothy Donnelley Foundation*
The Case Foundation*	General Mills Foundation*
Charles and Helen Schwab Foundation*	The George Gund Foundation*
The Chicago Community Trust*	The Gill Foundation*
The Christensen Fund*	Grand Rapids Community Foundation*
Claude Worthington Benedum Foundation*	Gulf Coast Community Foundation of Venice*
The Clowes Fund*	Harold K.L. Castle Foundation*
The Collins Foundation	Hartford Foundation for Public Giving*
The Colorado Health Foundation*	The Harvest Foundation of the Piedmont*
The Colorado Trust*	The Heinz Endowments*
Community Memorial Foundation*	Hess Foundation
Community Technology Foundation of California*	Houston Endowment, Inc.*
Connecticut Health Foundation*	The Jacob and Valeria Langeloth Foundation*
Conrad N. Hilton Foundation*	The James Irvine Foundation*

Foundations Included in Comparative Set (2)

Jessie Smith Noyes Foundation*
The John A. Hartford Foundation*
The John D. and Catherine T. MacArthur Foundation*
John P. McGovern Foundation
The John R. Oishei Foundation*
The John S. and James L. Knight Foundation*
Kalamazoo Community Foundation*
Kansas Health Foundation*
The Kresge Foundation*
The Lenfest Foundation
Levi Strauss Foundation/Levi Strauss & Co.*
The Louis Calder Foundation
Lucile Packard Foundation for Children's Health*
Lumina Foundation for Education*
Maine Community Foundation*
Marguerite Casey Foundation*
The McKnight Foundation*
Medina Foundation*
MetroWest Community Health Care Foundation*
Missouri Foundation for Health*
The Nathan Cummings Foundation*
Nellie Mae Education Foundation*
The New Hampshire Charitable Foundation*
New York State Health Foundation*
Nina Mason Pulliam Charitable Trust*
Nord Family Foundation*
Northwest Health Foundation*
The Overbrook Foundation
Partnership for Excellence in Jewish Education (PEJE)*

The Peter and Elizabeth C. Tower Foundation*
PetSmart Charities*
Polk Bros. Foundation*
The Rhode Island Foundation*
Robert Wood Johnson Foundation*
Robin Hood Foundation*
The Rockefeller Foundation*
Rollin M. Gerstacker Foundation
The Saint Paul Foundation*
SC Ministry Foundation
Shelton Family Foundation
The Skillman Foundation*
Stuart Foundation*
Surdna Foundation, Inc.*
T.L.L. Temple Foundation
Thrivent Financial For Lutherans Foundation*
Vancouver Foundation*
Virginia G. Piper Charitable Trust
W.K. Kellogg Foundation*
Wachovia Regional Foundation*
The Wallace Foundation*
Walter & Elise Haas Fund*
Wellington Management Charitable Fund*
Wilburforce Foundation*
The William and Flora Hewlett Foundation*
The William Penn Foundation*
William T. Kemper Foundation
Windgate Charitable Foundation
Winter Park Health Foundation*
Z. Smith Reynolds Foundation*

Contents

I.	Introduction	2
II.	External Orientation	
	a) Field-Focused Measures	7
	b) Community-Focused Measures	10
	c) Effectiveness in Creating Social Impact	12
III.	Impact on Grantee Organizations	14
IV.	Satisfaction	20
V.	Interactions	23
VI.	Communication	30
VII.	Assistance Beyond the Grant Check	
	a) Management and Field-Related Assistance	36
	b) Assistance Securing Funding from Other Sources	42
VIII.	Grant Processes and Administration	
	a) Selection Process	48
	b) Reporting and Evaluation Processes	54
	c) Dollar Return on Grantee Administrative Hours	57
IX.	Grantee Suggestions for the Foundation	62
X.	Review of Findings and Analysis and Discussion	65
	<u>Appendix</u>	
A.	Grantmaking/Grantee Characteristics	68
B.	Excerpt of Operational Benchmarking Report (OBR)	84
C.	List of Foundations in Dataset	91
D.	About the Center for Effective Philanthropy	94

About the Center for Effective Philanthropy (CEP)

Mission

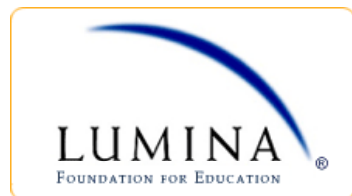
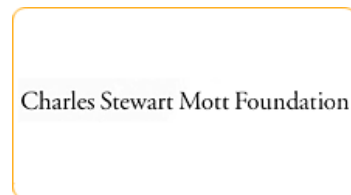
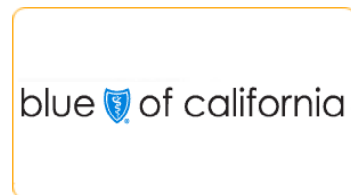
To provide data and create insight so philanthropic funders can better define, assess, and improve their effectiveness and impact.

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:



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.

- ◆ Please contact CEP if you have any questions:
 - Kevin Bolduc, Vice President – Assessment Tools
617-492-0800 ext. 202
kevinb@effectivephilanthropy.org

 - Kelly Chang, Research Analyst
617-492-0800 ext. 220
kellyc@effectivephilanthropy.org