Grantee Perception Report®

PREPARED FOR

The William and Flora Hewlett Foundation

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TABLE OF CONTENTS

HOW TO READ CHARTS **3**

EXECUTIVE SUMMARY 4
GPR Ratings Summary 5
Word Cloud 8

SURVEY POPULATION **9**

GRANTMAKING CHARACTERISTICS **13**

IMPACT ON GRANTEES' FIELDS AND LOCAL COMMUNITIES **16**
Field-Focused Measures 16
Community-Focused Measures 20

IMPACT ON GRANTEES' ORGANIZATIONS **23**

FUNDER-GRANTEE RELATIONSHIPS **32**
Interactions Measures 33
Communications Measures 39

GRANT PROCESSES **59**
Selection Process 61
Reporting and Evaluation Process 67

DOLLAR RETURN AND TIME SPENT ON PROCESSES **75**
Time Spent on Processes 77

NON-MONETARY ASSISTANCE **81**

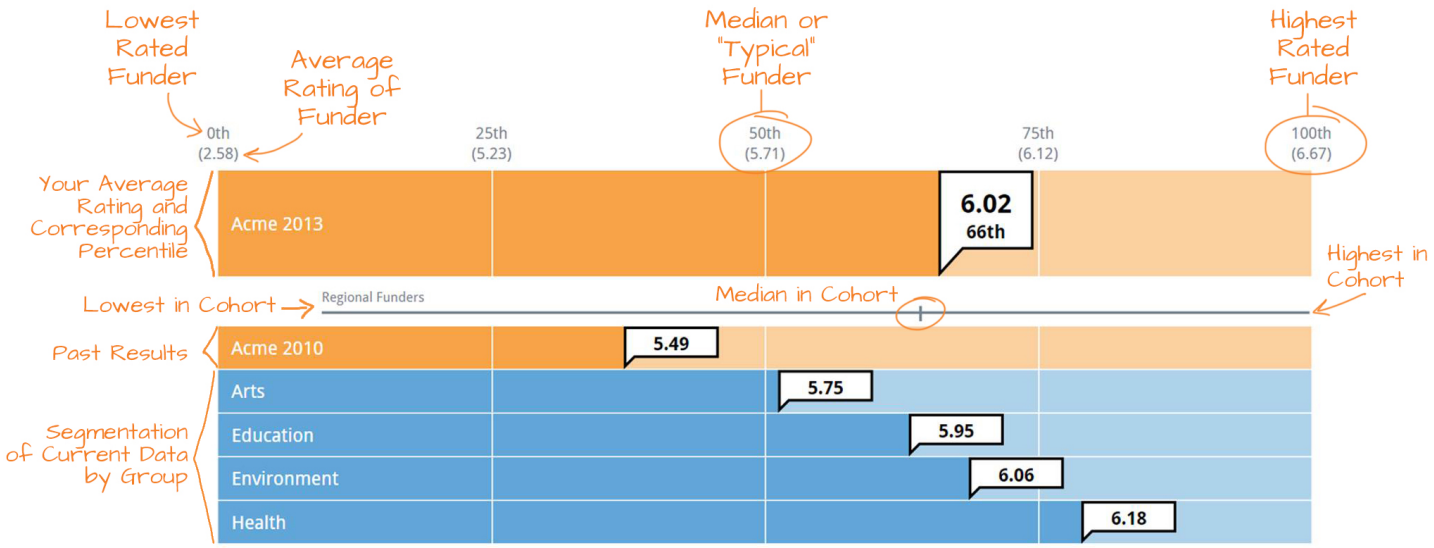
GRANTEE SUGGESTIONS FOR THE FOUNDATION 91

CONTEXTUAL DATA **95**
Grant Length, Type, and Size 96
Grantee Characteristics 99
Funder Characteristics 102

ADDITIONAL SURVEY INFORMATION **103**

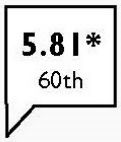
ABOUT CEP **105**

INTERPRETING YOUR CHARTS



STATISTICAL SIGNIFICANCE OF CHANGES OVER TIME

CEP compares your past ratings to your current ratings, testing for statistically significant differences. An asterisk in your current results denotes a statistically significant difference between your current rating and the previous rating.



EXECUTIVE SUMMARY

The following summary highlights key findings about grantees' perceptions of The William and Flora Hewlett Foundation compared to other foundations whose grantees CEP has surveyed.

Throughout this report, results are described as 'more positive' when an average rating is higher than that of 65 percent of funders in CEP's dataset, and 'less positive' when a rating is lower than that of 65 percent of funders.

- Overall, Hewlett grantees continue to have very positive perceptions of the Foundation compared to grantees of the typical funder. The Foundation has maintained or improved on many of the ratings it received in 2013.
    - Hewlett receives ratings that are statistically significantly higher than in 2013 for its overall transparency.

- Hewlett's understanding of grantees' fields, advancement of knowledge, and effect on public policy continue to be areas of strength for the Foundation, with grantees providing ratings that are higher than those of 80 percent of funders in CEP's dataset.

- Particularly compared to other large foundations, Hewlett continues to be rated more positively than typical for the strength of its relationships with grantees.

- As in 2013, Hewlett grantees rate the Foundation's impact on their organizations and the helpfulness of its selection and reporting/evaluation processes similar to the typical funder.
    - Grantees express appreciation for general operating support provided and those grantees receiving general operating support rate significantly higher for the Foundation's impact on their organizations, among other measures.

- Grantees suggestions also mirror those in past surveys, most frequently requesting changes to the quality and quantity of interactions with the Foundation, additional assistance beyond the grant, and adjustments to Hewlett's selection process.

SUMMARY OF DIFFERENCES BY SUBGROUPS

Program Area: Similar to 2013, Performing Arts grantees rate higher than other program areas for more than half of the major measures tested in the report.

Funding Pattern: Hewlett grantees who report receiving consistent funding from Hewlett rate significantly more positively than grantees who have received inconsistent or no past funding for the Foundation's impact on grantees' fields, communities, organizations, and overall funder-grantee relationships.

Type of Funding: Grantees who receive general operating support rate Hewlett higher than other grantees for more than half of the major measures tested in the report.

Number of Grants Received: Hewlett grantees who have received three or more grants from the Foundation rate the Foundation's impact on and understanding of their organizations significantly more positively than grantees who have received one or two grants from the Foundation.

OE Recipient: Grantees receiving supplemental OE capacity building grants rate higher than grantees not receiving OE grants on more than half of the major measures tested in the report, a finding similar to 2013.

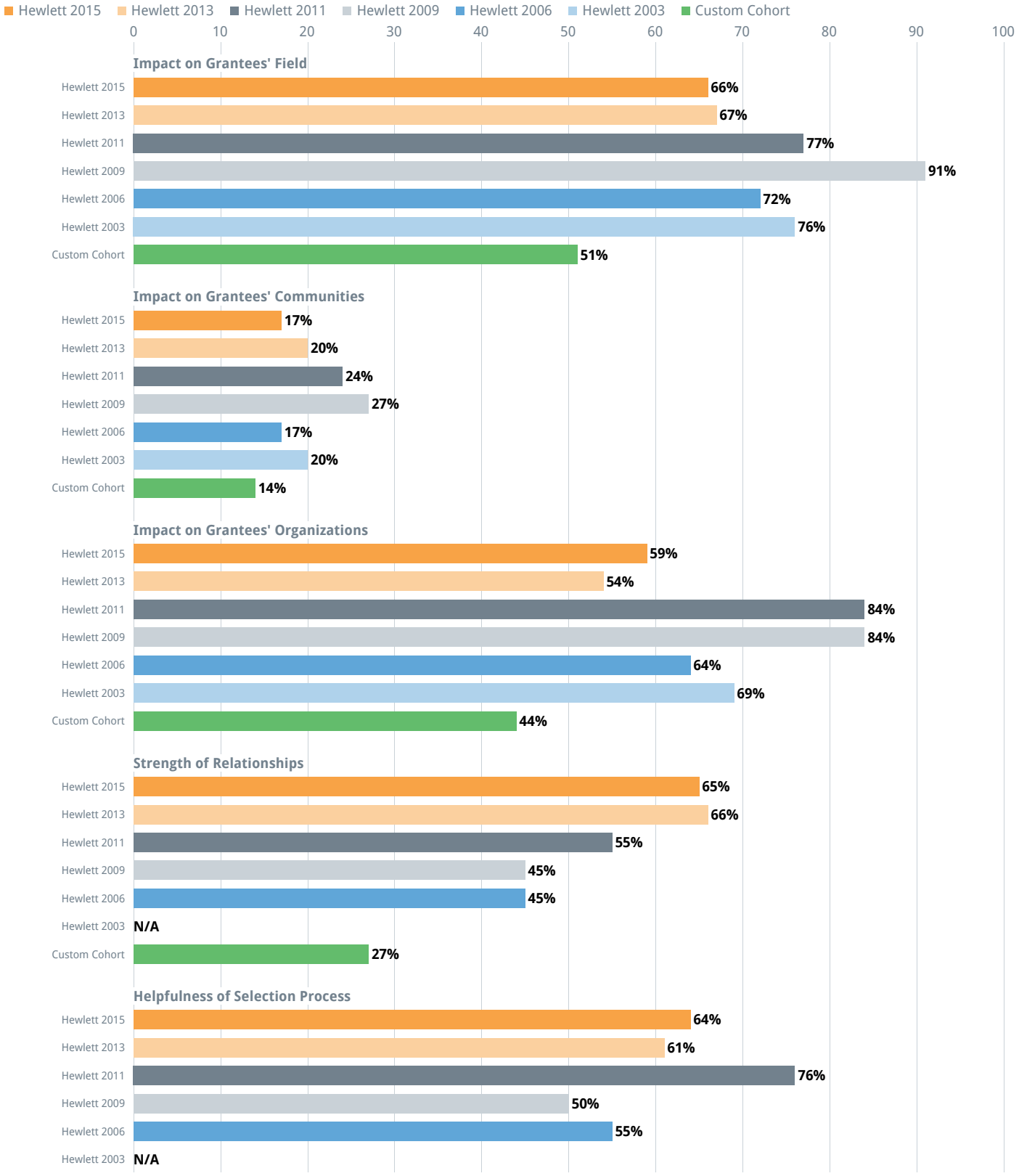
Primary Geography Served: Domestic grantees rate the Foundation's impact on and understanding of their communities and clarity and consistency of the Foundation's communications significantly more positively than other grantees.

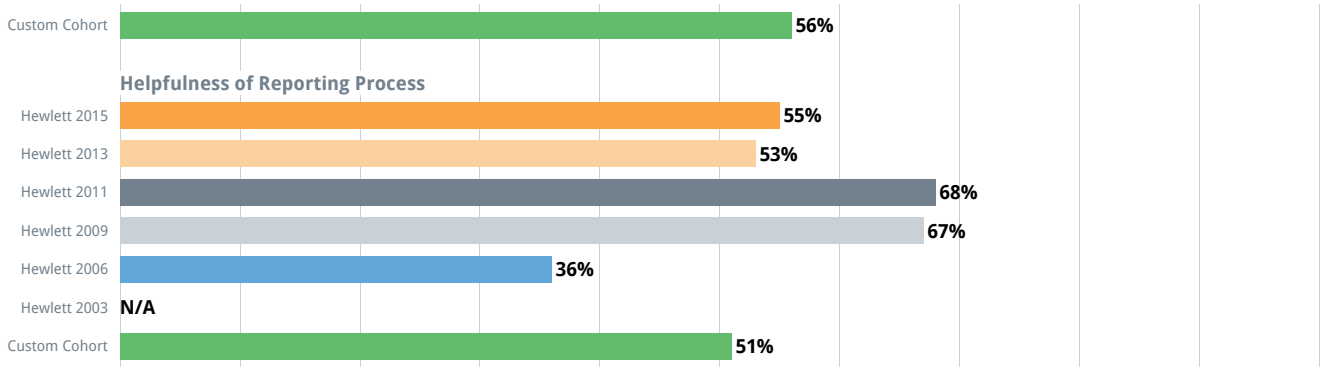
Final Renewal: Final renewal grantees rate the Foundation's impact on their fields and organizations and the clarity of the Foundation's communications significantly lower than other grantees.

GPR Ratings Summary

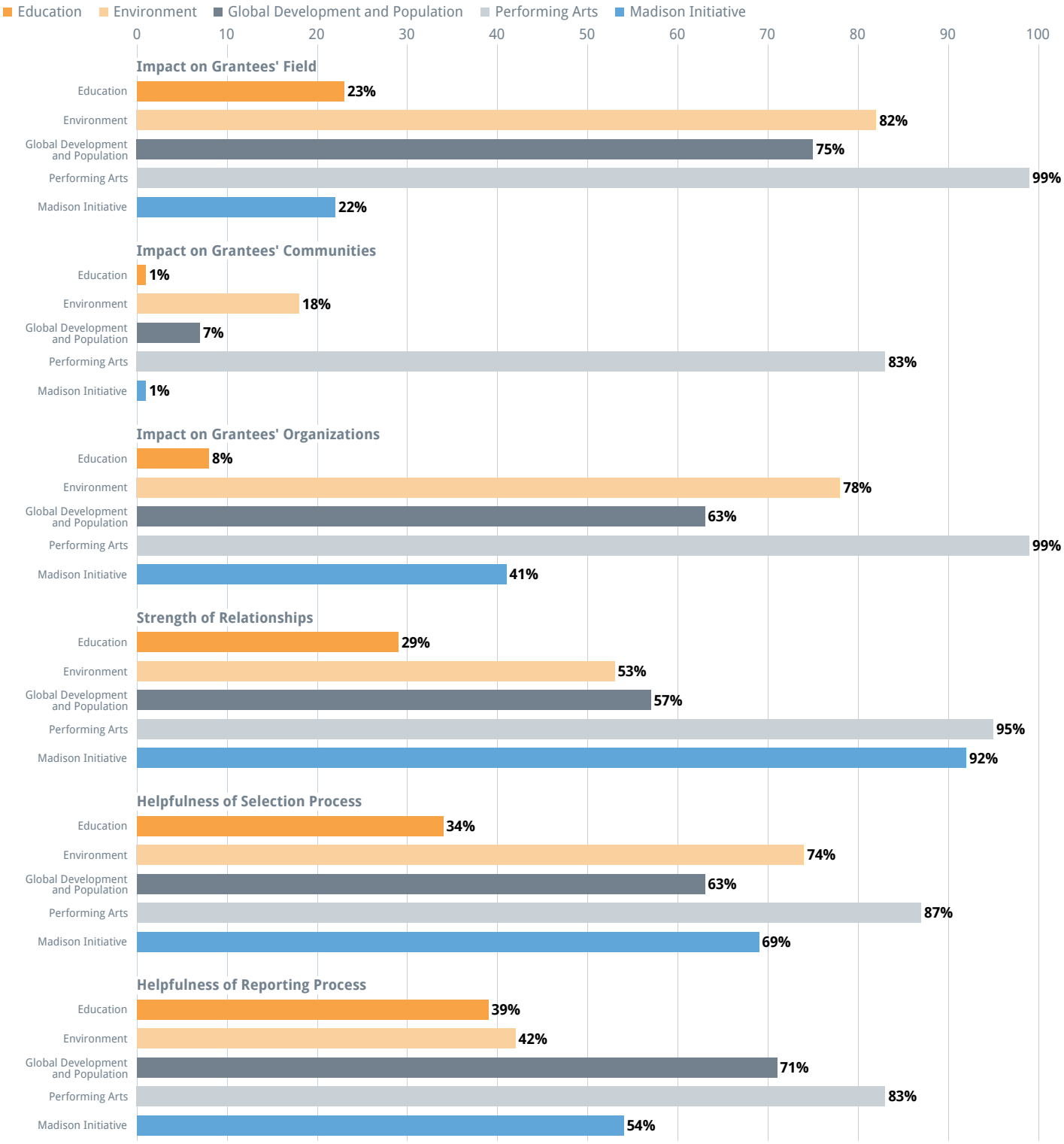
The chart below shows The William and Flora Hewlett Foundation's percentile ranking on key areas of the GPR relative to CEP's overall comparative dataset, where 0% indicates the lowest rated funder, and 100% indicates the highest rated funder. Rankings are also shown for Hewlett's previous GPR data and the median funder in the selected peer cohort.

Percentile Rank on Key Measures




Custom Cohort
56%
Helpfulness of Reporting Process
Hewlett 2015
55%
Hewlett 2013
53%
Hewlett 2011
68%
Hewlett 2009
67%
Hewlett 2006
36%
Hewlett 2003
N/A
Custom Cohort
51%

Percentile Rank on Key Measures by Subgroup



Word Cloud

Grantees were asked, “At this point in time, what is one word that best describes the Foundation?” In the “word cloud” below, the size of each word indicates the frequency with which it was written by grantees. The color of each word is stylistic and not indicative of its frequency. Seventy grantees described Hewlett as “supportive,” the most commonly used word.

This image was produced using a free tool available at www.tagxedo.com. Copyright (c) 2006, ComponentAce. http://www.componentace.com.

SURVEY POPULATION

Survey	Survey Fielded	Year of Active Grants	Number of Responses Received	Survey Response Rate
Hewlett 2015	September and October 2015	June 2014 - May 2015	707	62%
Hewlett 2013	September and October 2013	2012	693	66%
Hewlett 2011	September and October 2011	2010	535	69%
Hewlett 2009	May and June 2009	2008	570	70%
Hewlett 2006	September and October 2006	2005	504	69%
Hewlett 2003	September and October 2003	2002	271	70%

Throughout this report, The William and Flora Hewlett Foundation's survey results are compared to CEP's broader dataset of more than 40,000 grantees built up over more than a decade of grantee surveys of more than 250 funders. The full list of participating funders can be found at http://www.effectivephilanthropy.org/assessment-tools/gpr-apr.

In order to protect the confidentiality of respondents results are not shown when CEP received fewer than five responses to a specific question.

SUBGROUPS

In addition to showing Hewlett's overall ratings, this report shows ratings segmented by Program Area. The online version of this report also shows ratings segmented by Subprogram, Funding Pattern, Type of Funding, Number of Grants Received, OE Recipient, Primary Geography Served and Final Renewal.

Program Area	Number of Responses
Education	104
Environment	116
Global Development and Population	181
Performing Arts	164
Madison Initiative	39

Number of Grants Received	Number of Responses
1	411
2	207
3 or more	89

OE Recipient	Number of Responses
Non-OE	451
OE Recipient	200

Primary Geography Served	Number of Responses
Domestic	483
International	203
Developing Countries	21

Final Renewal	Number of Responses
Other Grant	679
Final Renewal Grant	27

Funding Pattern	Number of Responses
First-Time Grantee	137
Consistently Funded in Past	456
Inconsistently Funded in Past	90

Type of Funding	Number of Responses
General Operating Support	308
Program/Project Support	360
Scholarship or research fellowship	11
Technical assistance/capacity building	11
Event/sponsorship funding	10

CUSTOMIZED COHORT

Hewlett selected a set of 15 funders to create a smaller comparison group that more closely resembles Hewlett in scale and scope.

Custom Cohort
Bill & Melinda Gates Foundation
Carnegie Corporation of New York
Doris Duke Charitable Foundation
Ford Foundation
Gordon and Betty Moore Foundation
John D. and Catherine T. MacArthur Foundation
John S. and James L. Knight Foundation
Robert Wood Johnson Foundation
The Children's Investment Fund Foundation
The David and Lucile Packard Foundation
The James Irvine Foundation
The Kresge Foundation
The Rockefeller Foundation
The William and Flora Hewlett Foundation
W.K. Kellogg Foundation

STANDARD COHORTS

CEP also included 16 standard cohorts to allow for comparisons to a variety of different types of funders. A full list of standard cohorts and descriptions is below.

Strategy Cohorts

Cohort Name	Count	Description
Small Grant Providers	44	Funders with median grant size of $20K or less
Large Grant Providers	48	Funders with median grant size of $200K or more
High Touch Funders	21	Funders for which a majority of grantees report having contact with their primary contact monthly or more often
Intensive Non-Monetary Assistance Providers	30	Funders that provide at least 30% of grantees with comprehensive or field-focused assistance as defined by CEP
Proactive Grantmakers	45	Funders that make at least 90% of grants proactively
Reactive Grantmakers	44	Funders that make at most 10% of grants proactively
International Funders	37	Funders with an international scope of work

Annual Giving Cohorts

Cohort Name	Count	Description
Funders Giving Less Than $5 Million	52	Funders with annual giving of less than $5 million
Funders Giving $50 Million Or More	47	Funders with annual giving of $50 million or more

Foundation Type Cohorts

Cohort Name	Count	Description
Private Foundations	125	All private foundations in the GPR dataset
Family Foundations	43	All family foundations in the GPR dataset
Community Foundations	31	All community foundations in the GPR dataset
Health Conversion Foundations	25	All health conversation foundations in the GPR dataset
Corporate Foundations	16	All corporate foundations in the GPR dataset

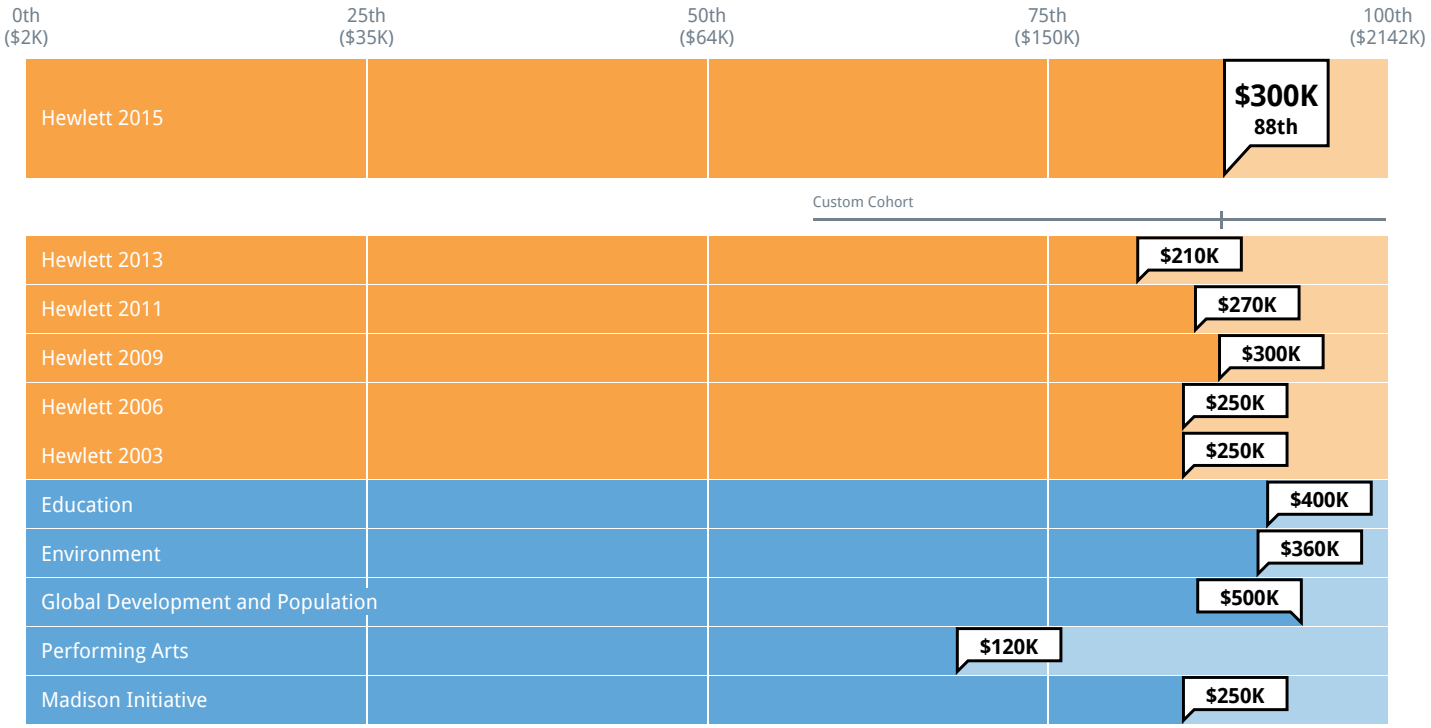
Other Cohorts

Cohort Name	Count	Description
Funders Outside the United States	20	Funders that are primarily based outside the United States
Recently Established Foundations	41	Funders that were established in 2000 or later

GRANTMAKING CHARACTERISTICS

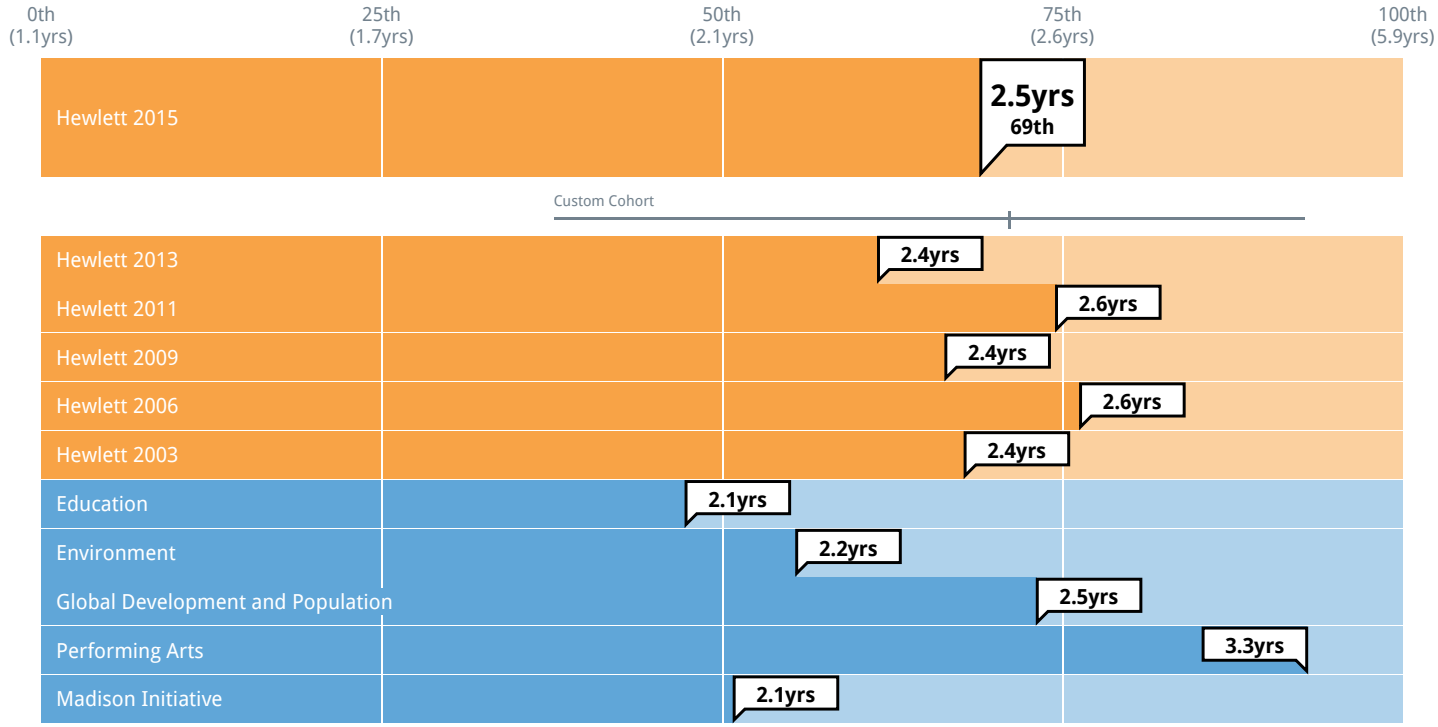
Foundations make different choices about the ways they organize themselves, structure their grants, and the types of grantees they support. The following charts and tables show some of these important characteristics. The information is based on self-reported data from funders and grantees, and further detail is available in the Contextual Data section of this report.

Median Grant Size



Cohort: Custom Cohort ▼ Past results: On Off Subgroup: Program Area ▼

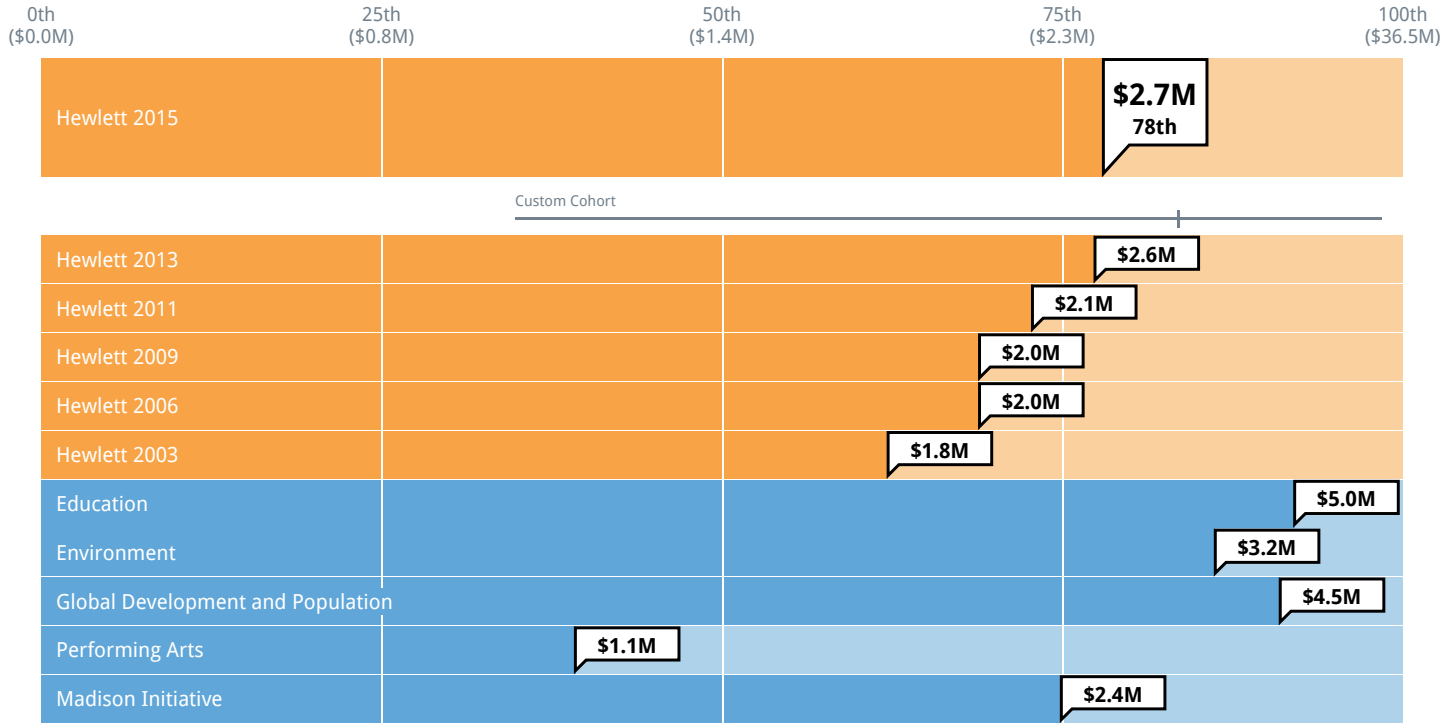
Average Grant Length



Cohort: Custom Cohort ▼ Past results: On Off Subgroup: Program Area ▼

Type of Support (Overall)	Hewlett 2015	Hewlett 2013	Hewlett 2011	Hewlett 2009	Hewlett 2006	Average Funder	Custom Cohort
Percent of grantees receiving general operating/core support	44%	40%	43%	43%	39%	20%	14%
Percent of grantees receiving program/project support	51%	55%	51%	53%	56%	64%	75%
Percent of grantees receiving other types of support	5%	5%	7%	4%	5%	15%	10%

Typical Organizational Budget



Cohort: Custom Cohort ▼ Past results: On Off Subgroup: Program Area ▼

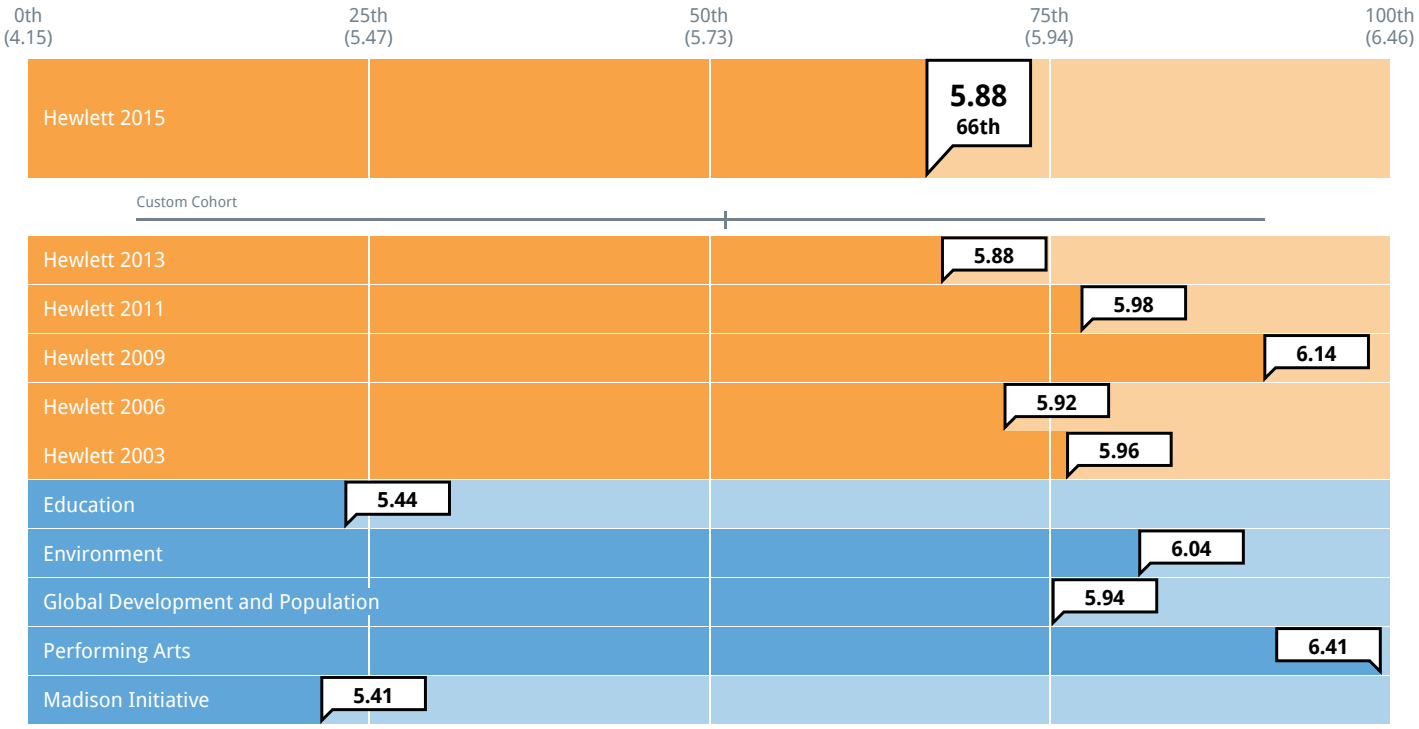
Grant History (Overall)	Hewlett 2015	Hewlett 2013	Hewlett 2011	Average Funder	Custom Cohort
Percentage of first-time grants	20%	16%	20%	29%	34%

Program Staff Load (Overall)	Hewlett 2015	Hewlett 2013	Hewlett 2011	Hewlett 2009	Hewlett 2006	Hewlett 2003	Median Funder	Custom Cohort
Dollars awarded per program staff full-time employee	$9.2M	$7.8M	$7.8M	$7.2M	$6.6M	$8.6M	$2.7M	$5.4M
Applications per program full-time employee	16	13	12	12	14	25	30	16
Active grants per program full-time employee	27	26	32	37	23	44	33	25

IMPACT ON AND UNDERSTANDING OF GRANTEES' FIELDS

"Overall, how would you rate the Foundation's impact on your field?"

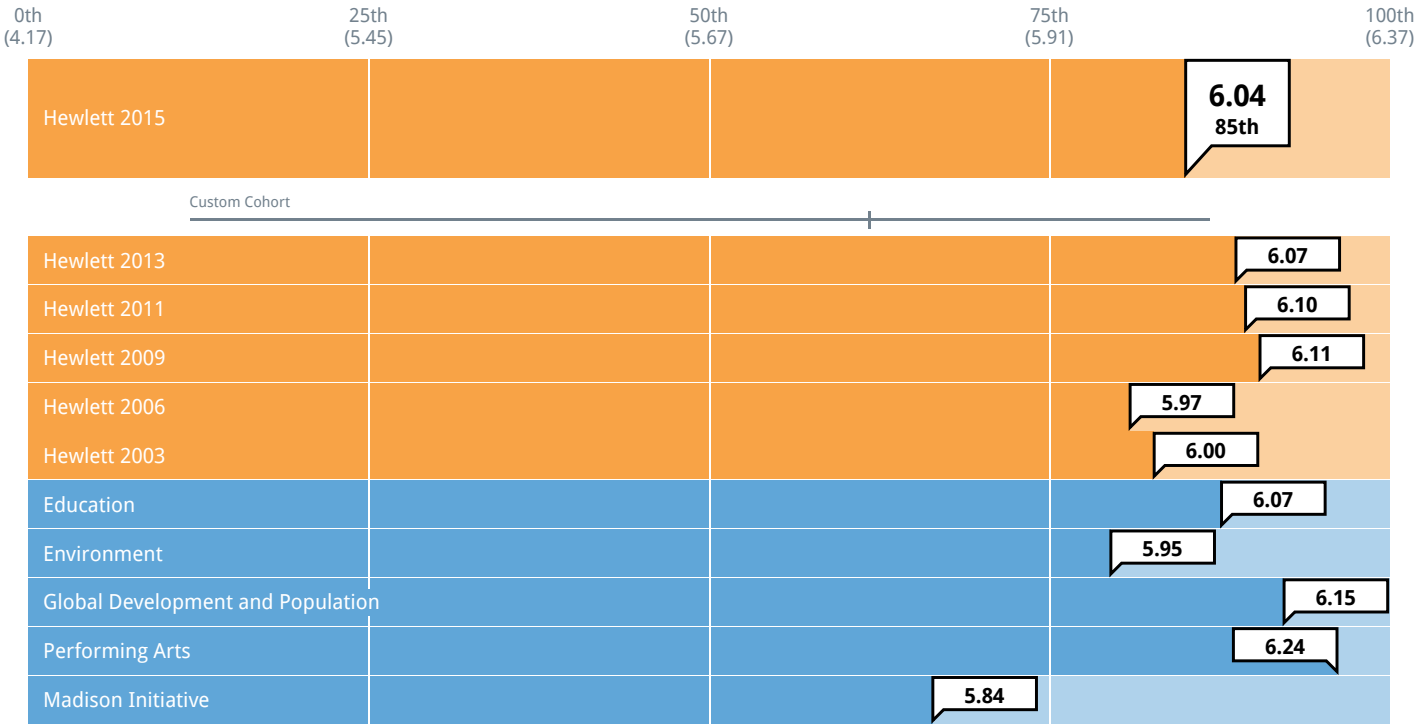
1 = No impact **7** = Significant positive impact



Cohort: Custom Cohort ▼ Past results: On Off Subgroup: Program Area ▼

"How well does the Foundation understand the field in which you work?"

1 = Limited understanding of the field **7** = Regarded as an expert in the field

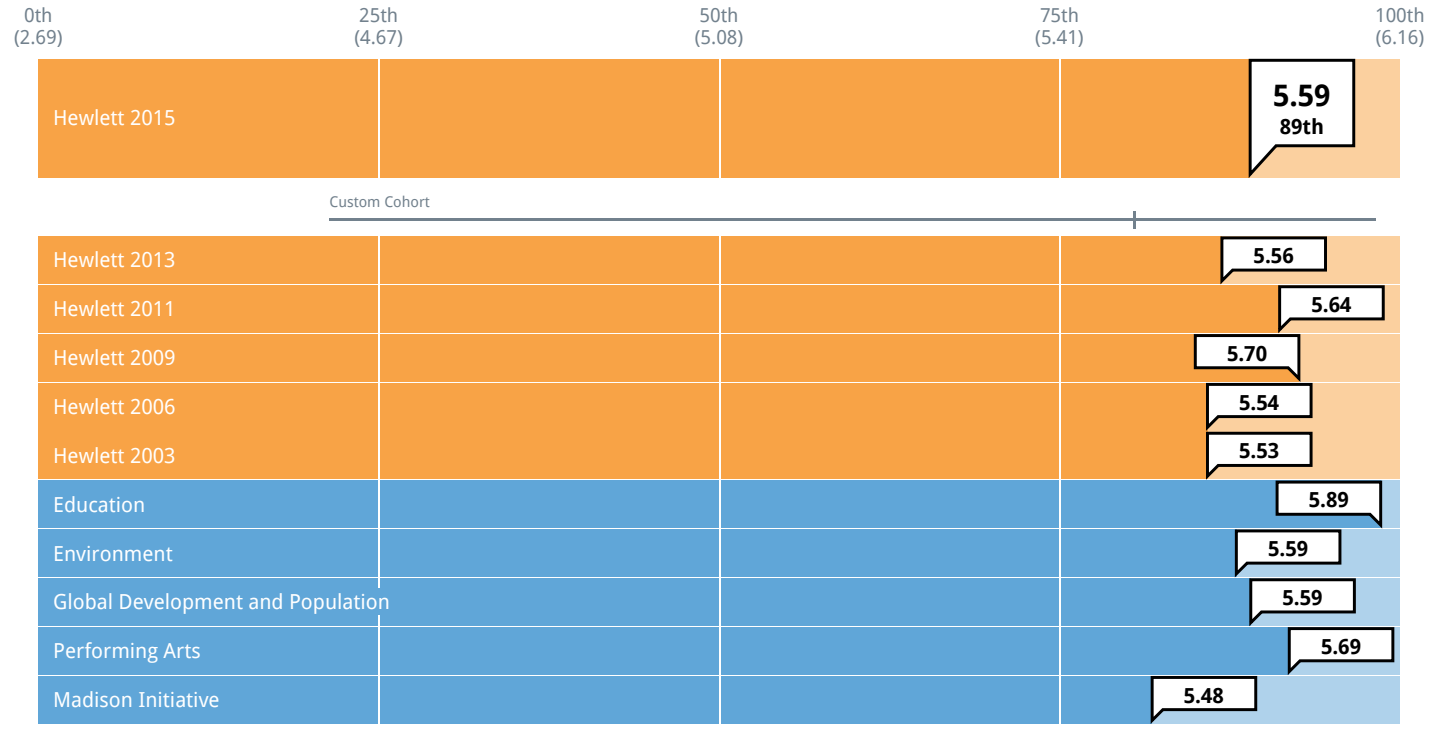


Cohort: Custom Cohort ▼ Past results: On Off Subgroup: Program Area ▼

Advancing Knowledge and Public Policy

"To what extent has the Foundation advanced the state of knowledge in your field?"

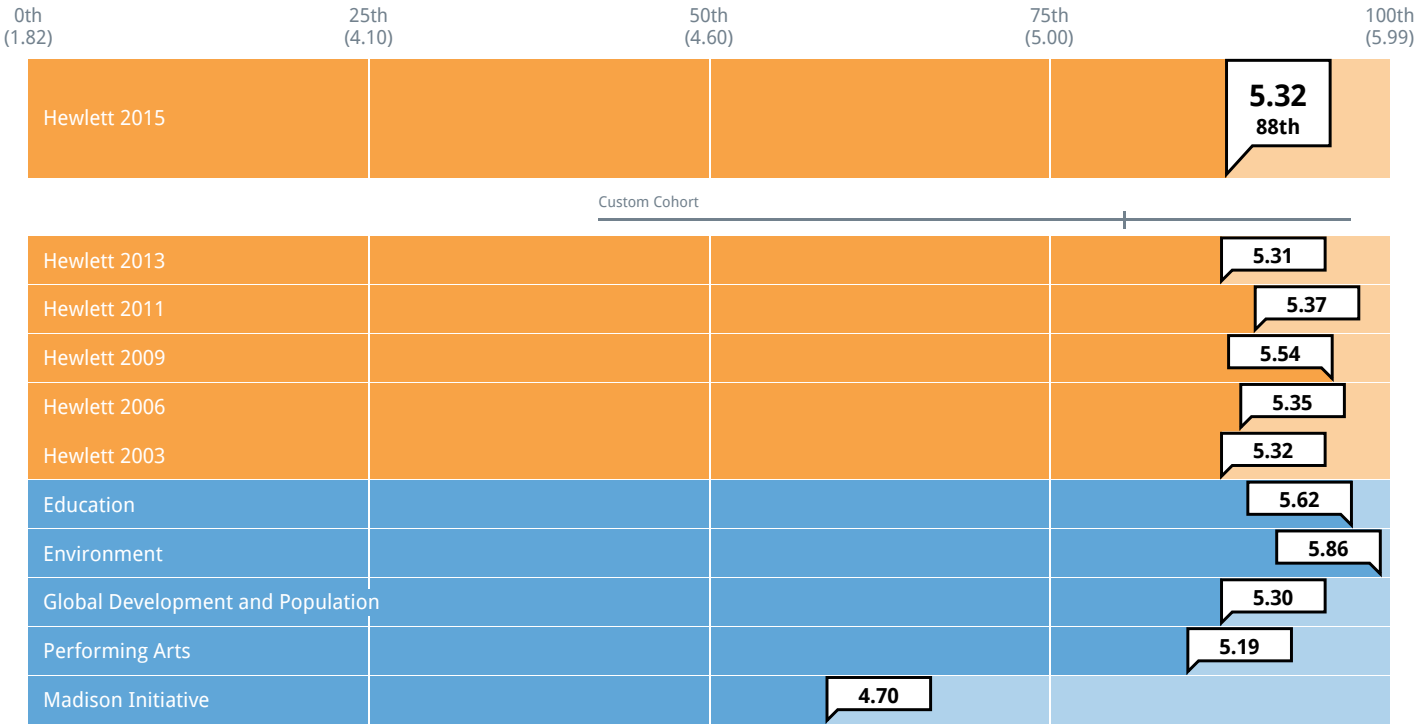
1 = Not at all **7** = Leads the field to new thinking and practice



Cohort: Custom Cohort ▼ Past results: On Off Subgroup: Program Area ▼

"To what extent has the Foundation affected public policy in your field?"

1 = Not at all **7** = Major influence on shaping public policy

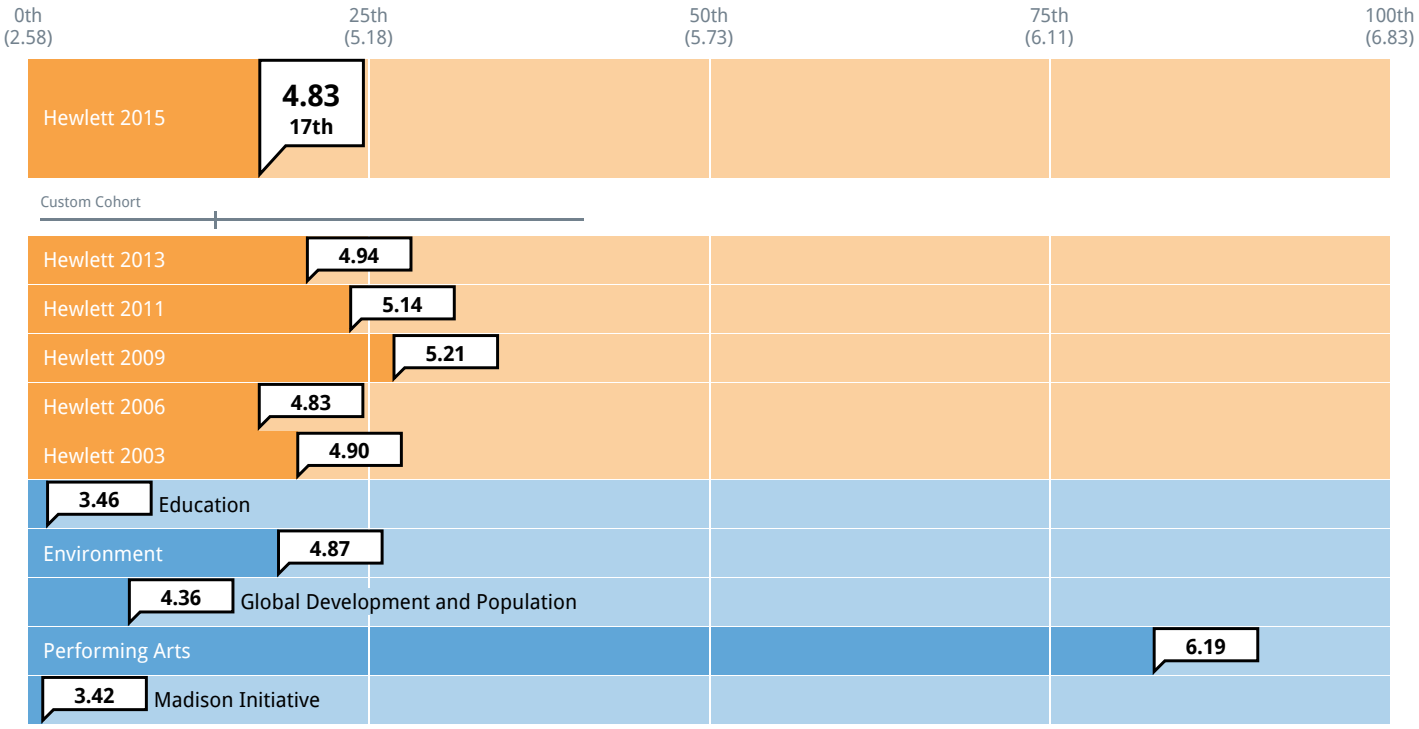


Cohort: Custom Cohort ▼ Past results: On Off Subgroup: Program Area ▼

IMPACT ON AND UNDERSTANDING OF GRANTEES' LOCAL COMMUNITIES

"Overall, how would you rate the Foundation's impact on your local community?"

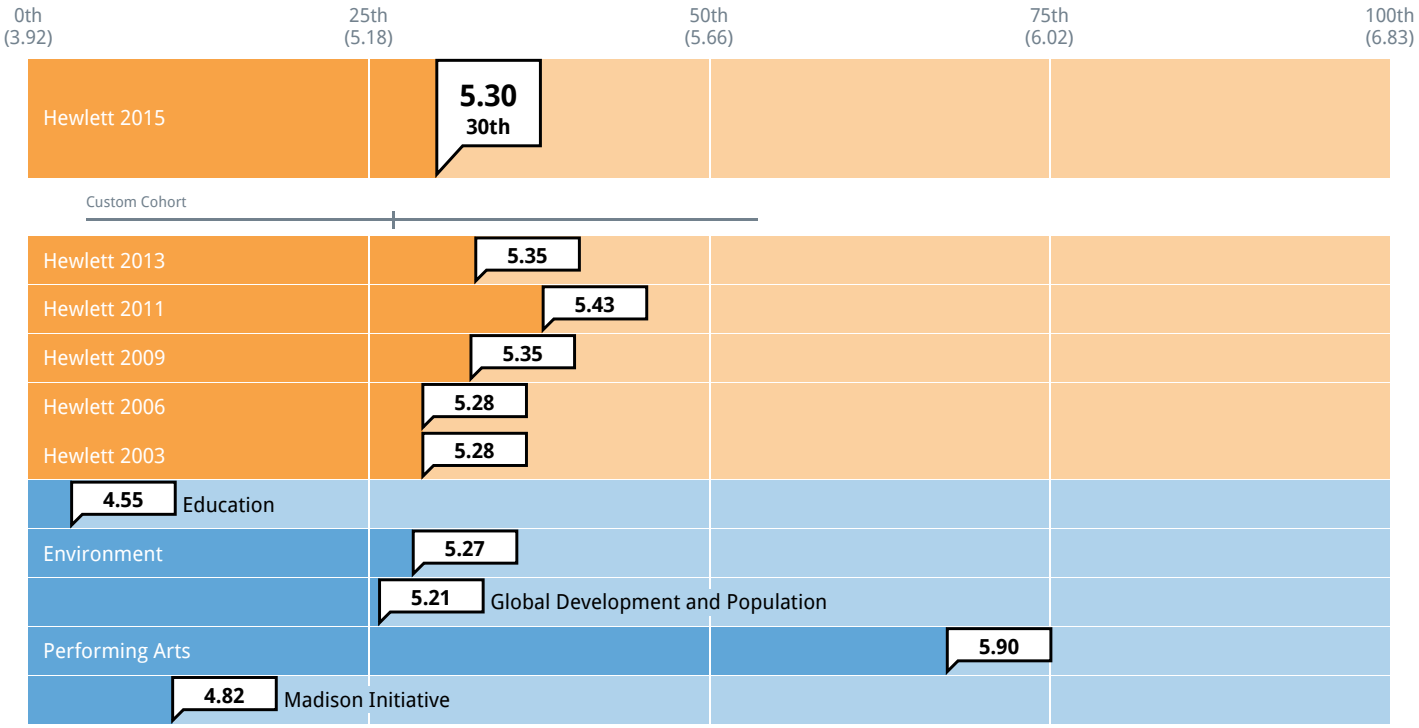
1 = No impact **7** = Significant positive impact



Cohort: Custom Cohort ▼ Past results: On Off Subgroup: Program Area ▼

"How well does the Foundation understand the local community in which you work?"

1 = Limited understanding of the community **7** = Regarded as an expert on the community

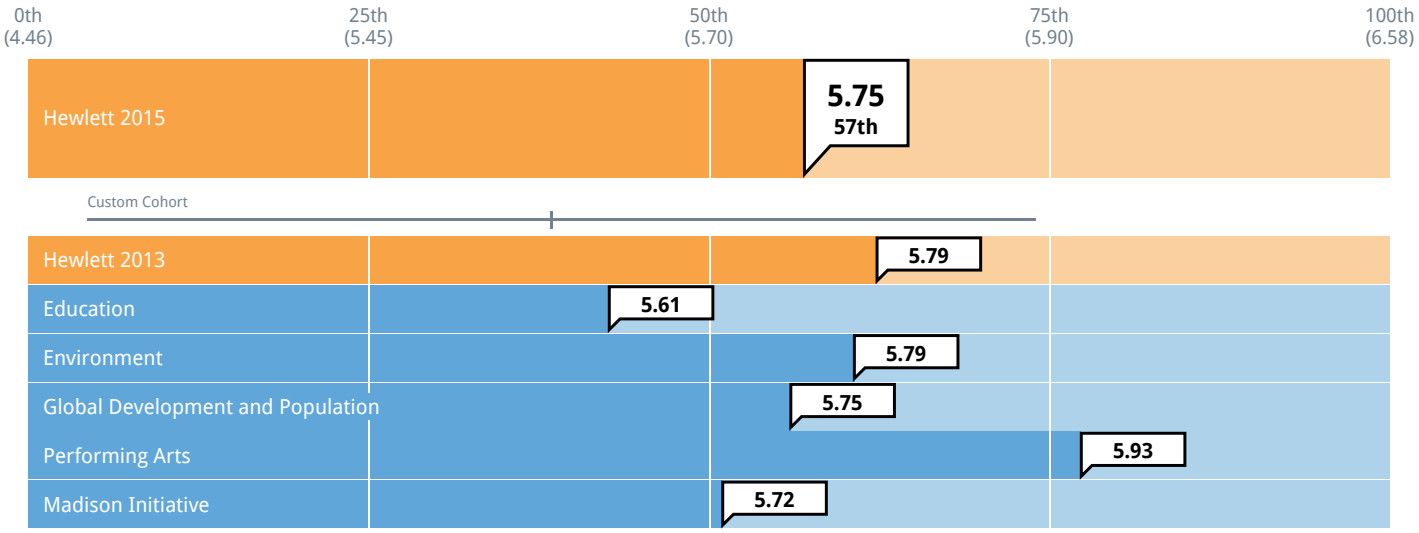


Cohort: Custom Cohort ▼ Past results: On Off Subgroup: Program Area ▼

Understanding of Contextual Factors

"How well does the Foundation understand the social, cultural, or socioeconomic factors that affect your work?"

1 = Limited understanding **7** = Thorough understanding

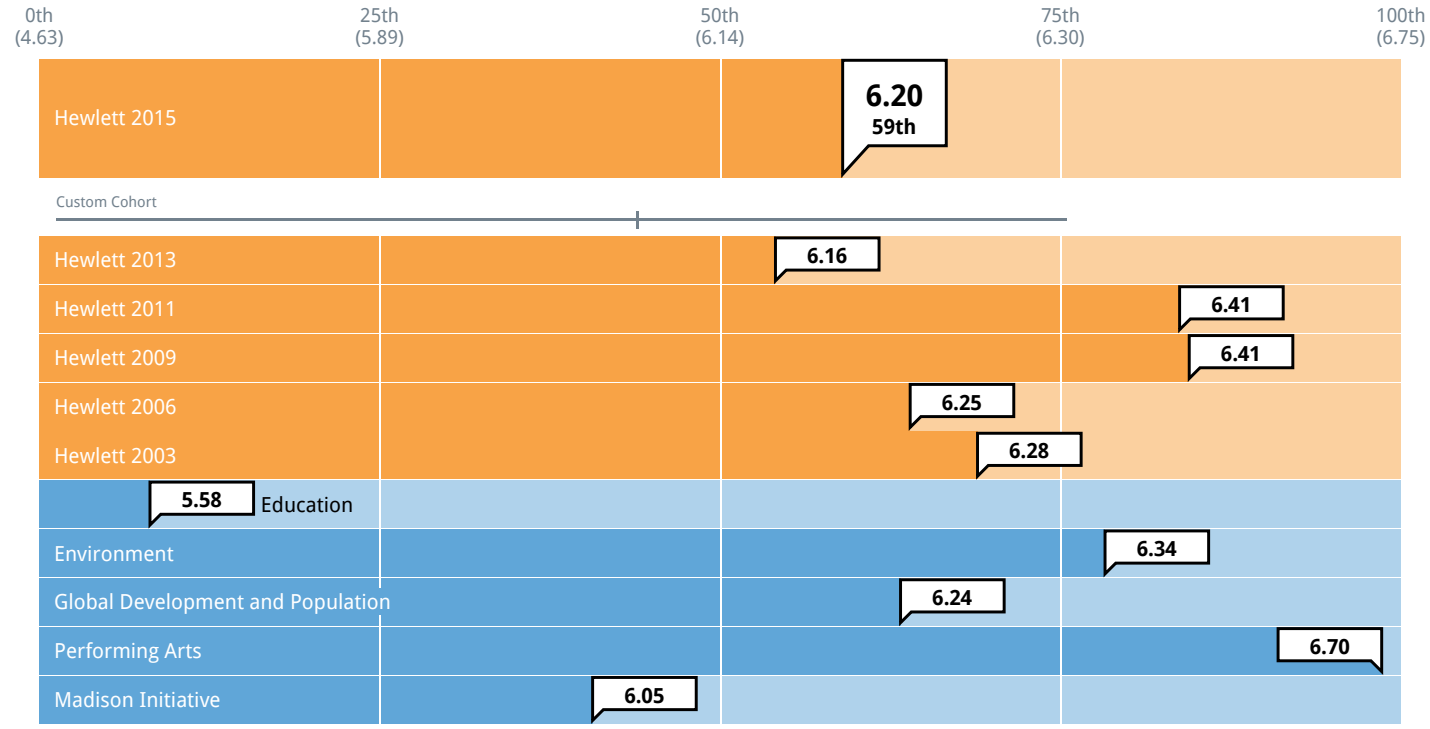


Cohort: Custom Cohort ▼ Past results: On Off Subgroup: Program Area ▼

IMPACT ON AND UNDERSTANDING OF GRANTEES' ORGANIZATIONS

"Overall, how would you rate the Foundation's impact on your organization?"

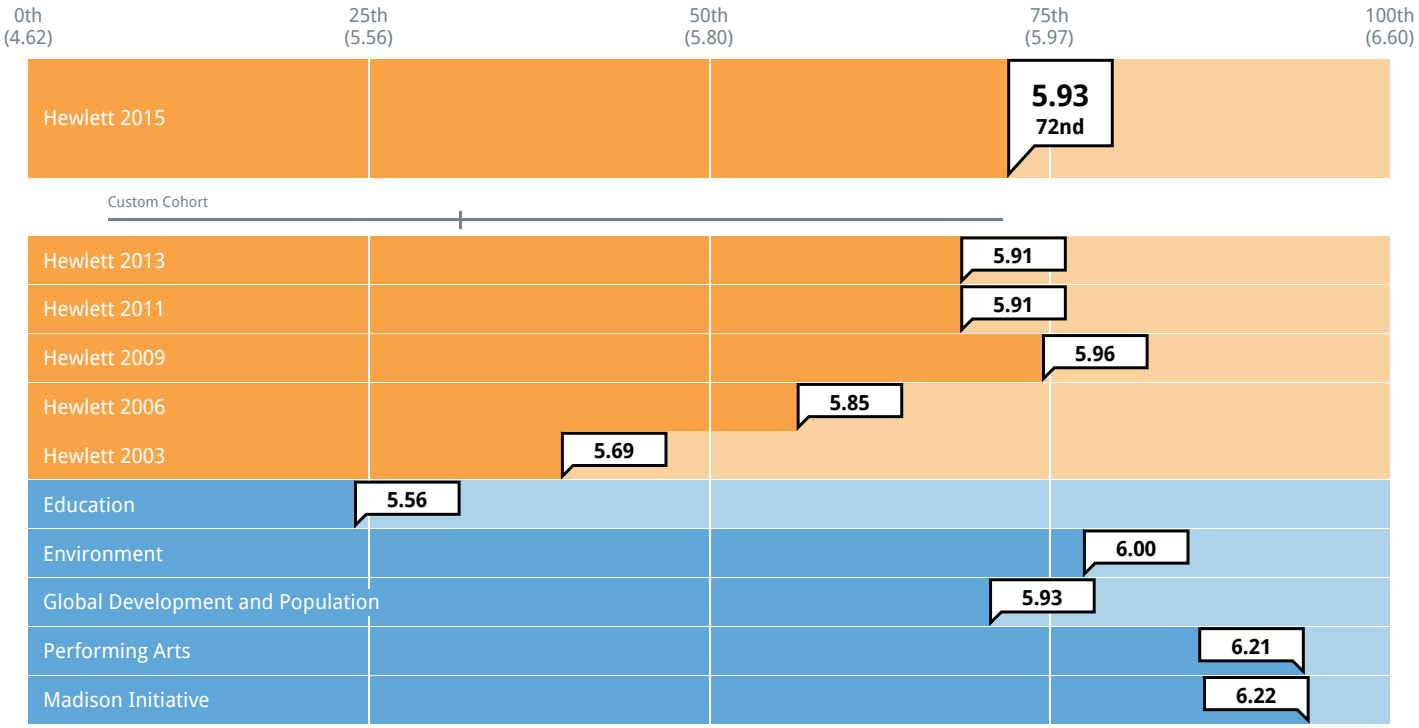
1 = No impact **7** = Significant positive impact



Cohort: Custom Cohort ▼ Past results: On Off Subgroup: Program Area ▼

"How well does the Foundation understand your organization's strategy and goals?"

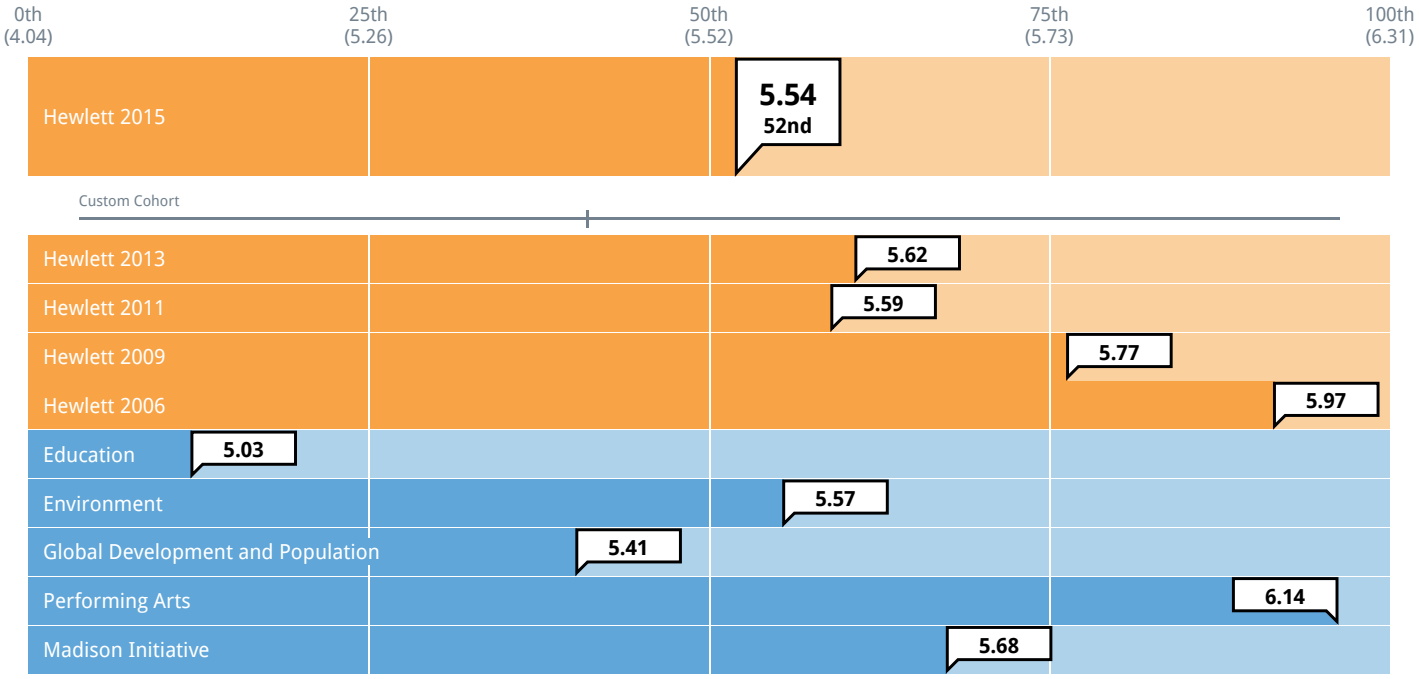
1 = Limited understanding **7** = Thorough understanding



Cohort: Custom Cohort ▼ Past results: On Off Subgroup: Program Area ▼

"How much, if at all, did the Foundation improve your ability to sustain the work funded by this grant in the future?"

1 = Did not improve ability **7** = Substantially improved ability

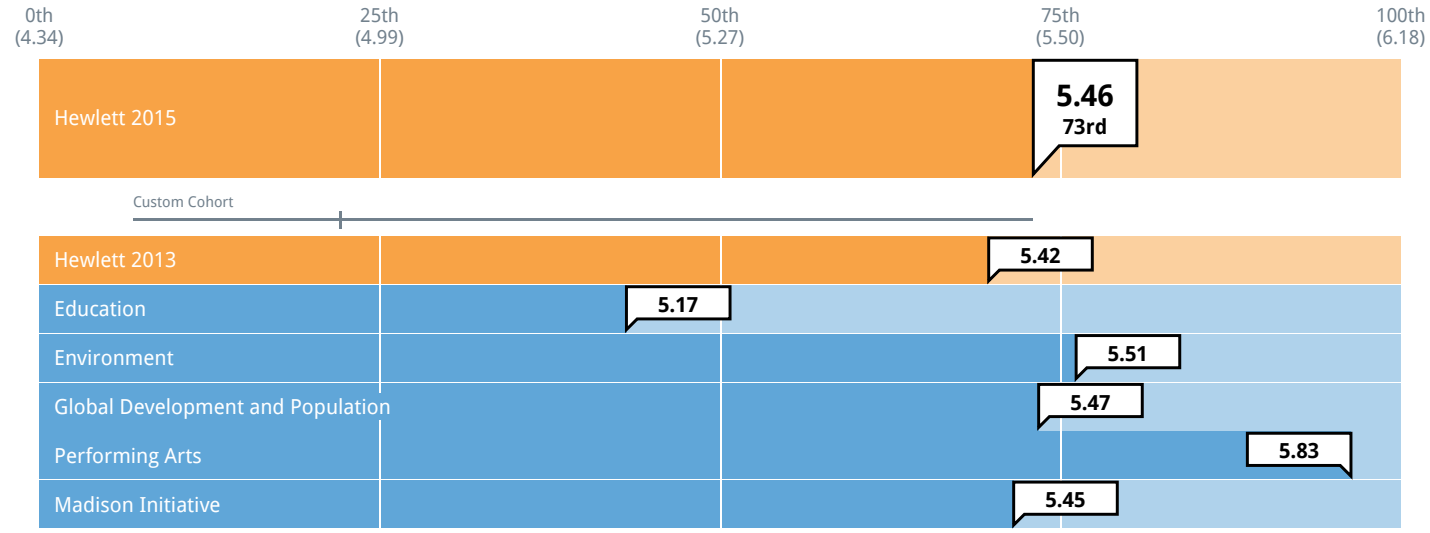


Cohort: Custom Cohort ▼ Past results: On Off Subgroup: Program Area ▼

Grantee Challenges

"How aware is the Foundation of the challenges that your organization is facing?"

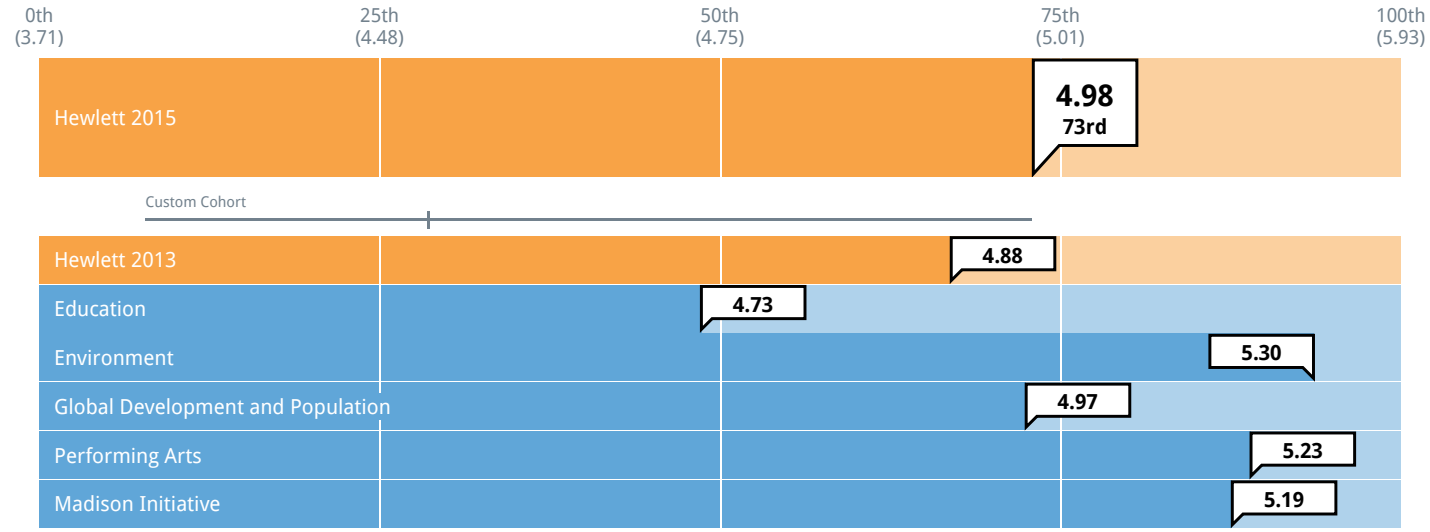
1 = Not at all aware **7** = Extremely aware



Cohort: Custom Cohort ▼ Past results: On Off Subgroup: Program Area ▼

"To what extent does the Foundation take advantage of its various resources to help your organization address its challenges?"

1 = Not at all **7** = To a very great extent



Cohort: Custom Cohort ▼ Past results: On Off Subgroup: Program Area ▼

Effect of Grant on Organization

"Which of the following statements best describes the primary effect the receipt of this grant had on your organization's programs or operations?"

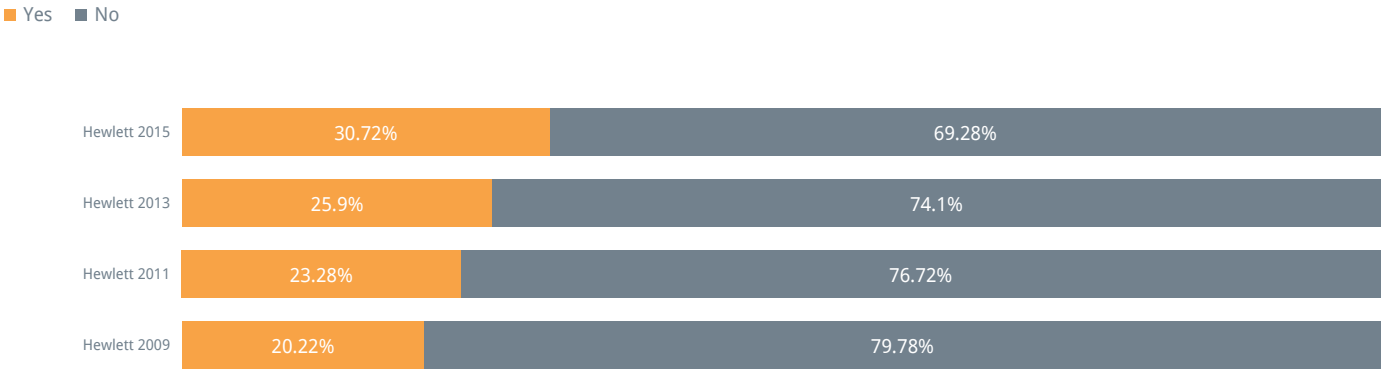
Primary Effect of Grant on Grantee's Organization (Overall)	Hewlett 2015	Hewlett 2013	Hewlett 2011	Hewlett 2009	Average Funder	Custom Cohort
Enhanced Capacity	40%	35%	39%	42%	29%	22%
Expanded Existing Program Work	23%	23%	20%	21%	26%	30%
Maintained Existing Program	18%	22%	16%	14%	20%	13%
Added New Program Work	19%	20%	25%	23%	25%	35%

Primary Effect of Grant on Grantee's Organization (By Subgroup)	Education	Environment	Global Development and Population	Performing Arts	Madison Initiative
Enhanced Capacity	23%	31%	29%	65%	33%
Expanded Existing Program Work	31%	35%	27%	6%	19%
Maintained Existing Program	14%	21%	21%	24%	6%
Added New Program Work	33%	13%	23%	4%	42%

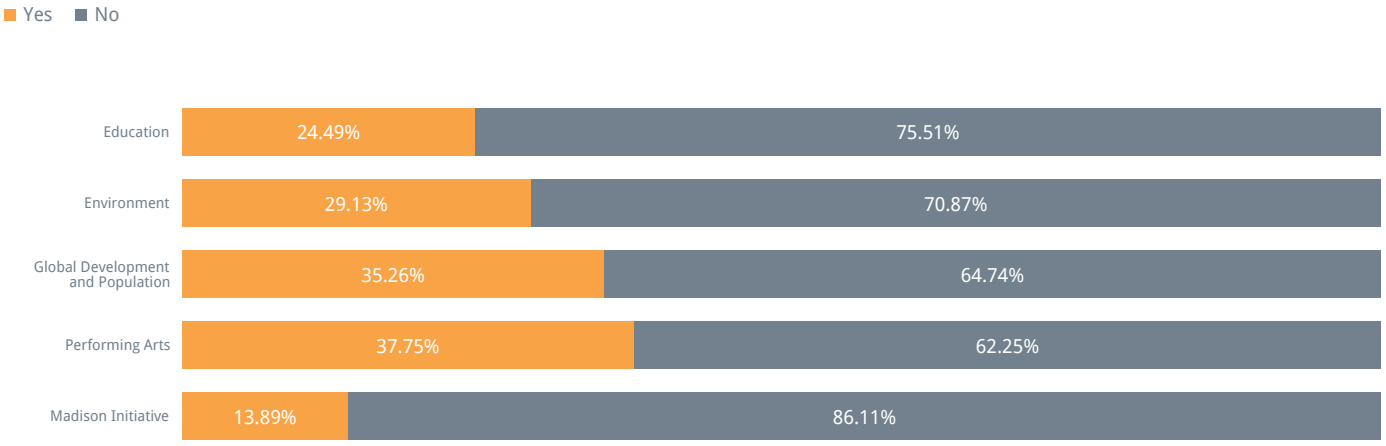
OE Capacity Building Grants

"Have you received a supplemental Organizational Effectiveness capacity building grant in addition to your primary grant from Hewlett?"

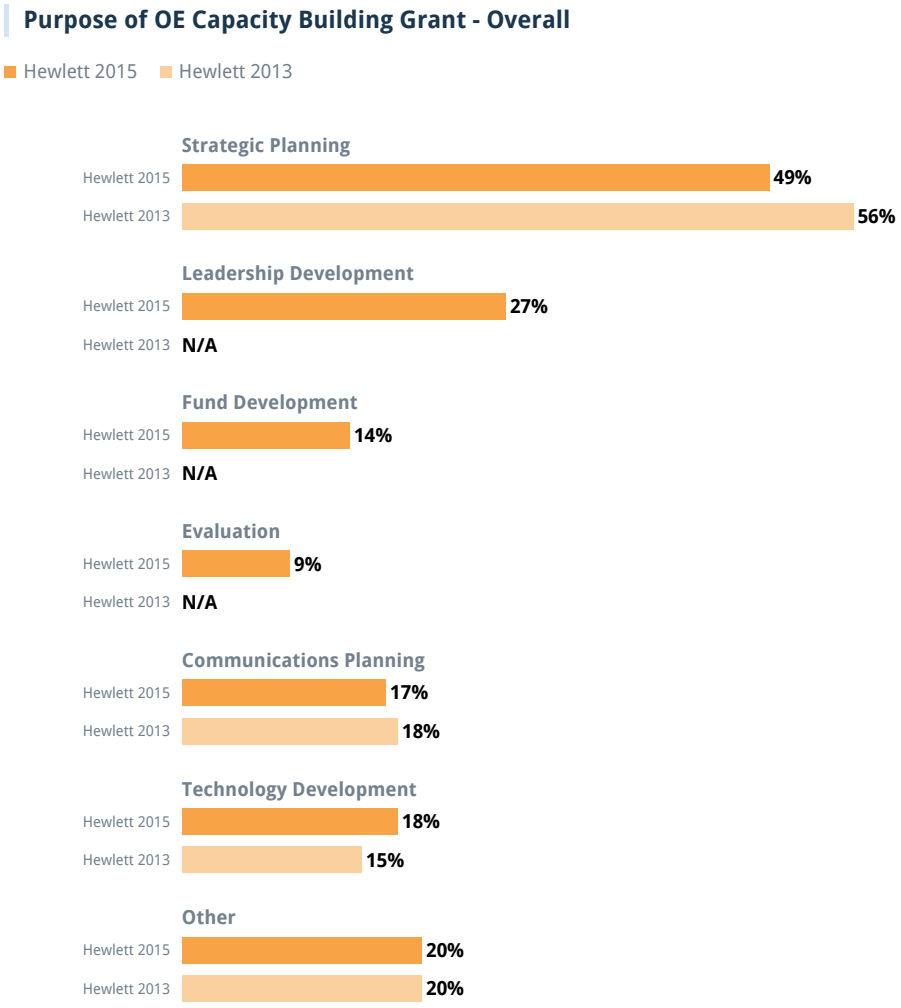
OE Recipients - Overall



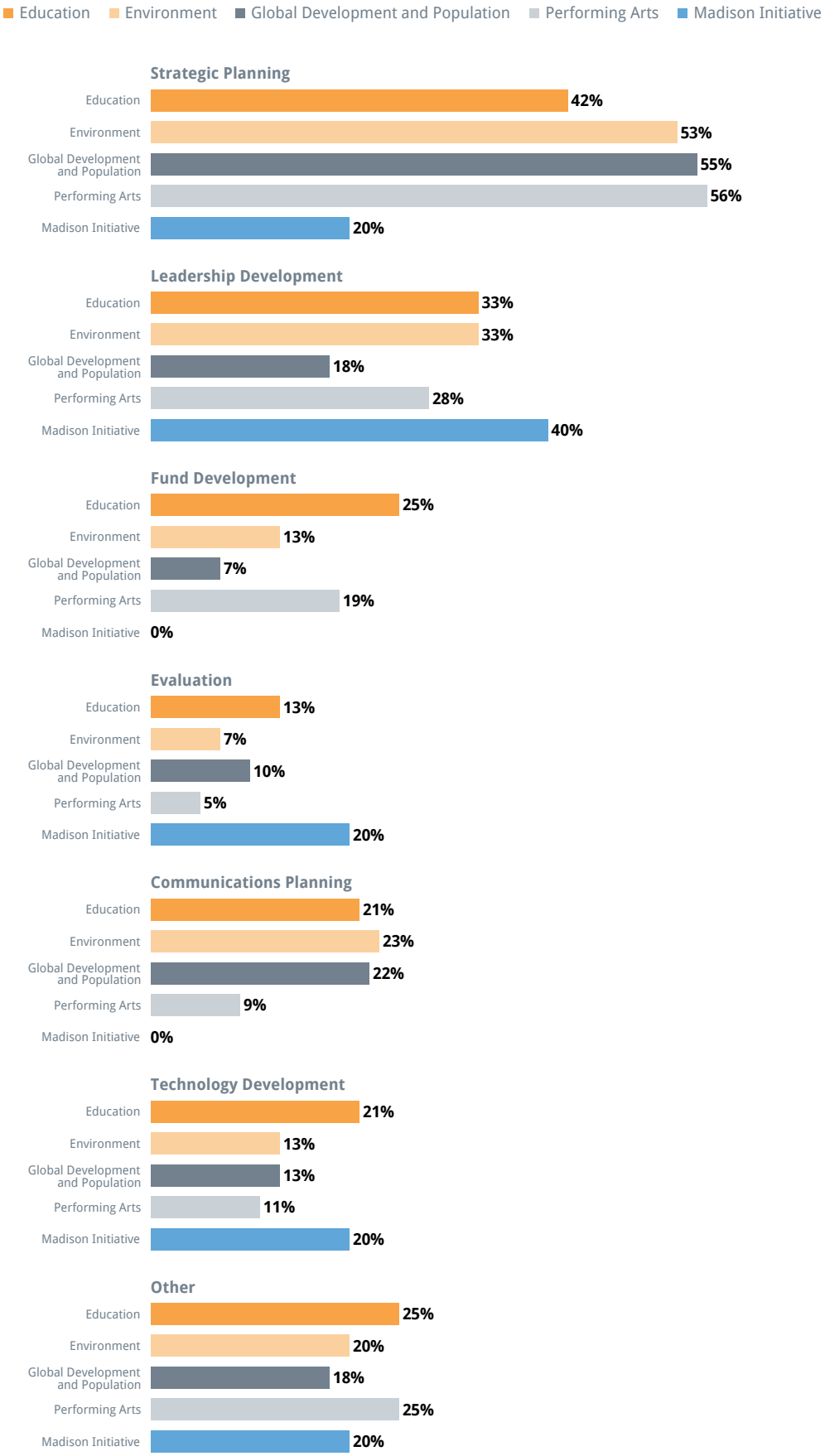
OE Recipients - By Subgroup



"What was the purpose of the Organizational Effectiveness capacity building grant?"

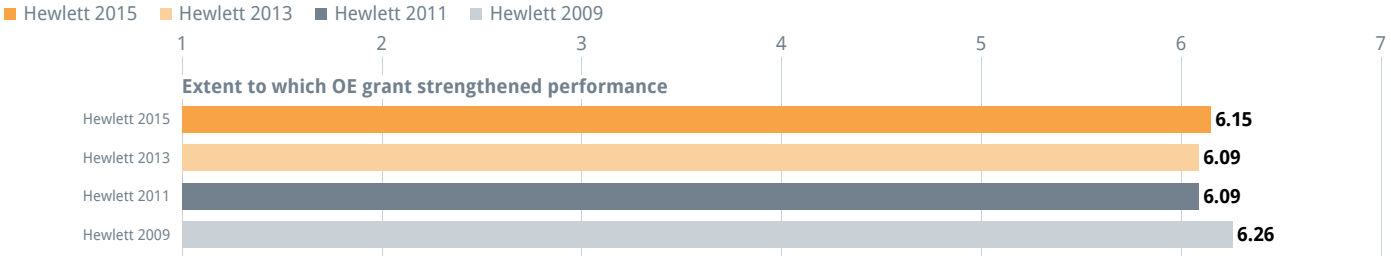


Purpose of OE Capacity Building Grant - By Subgroup

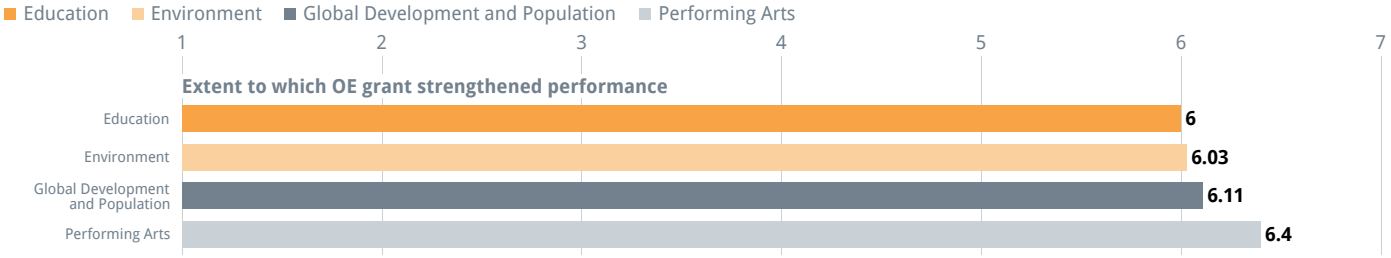


"To what extent has the Organizational Effectiveness grant strengthened the performance of your organization?"
(1 = Not at all, 7 = To a great extent)

OE Contribution to Organizations' Performance - Overall



OE Contribution to Organizations' Performance - By Subgroup



FUNDER-GRANTEE RELATIONSHIPS

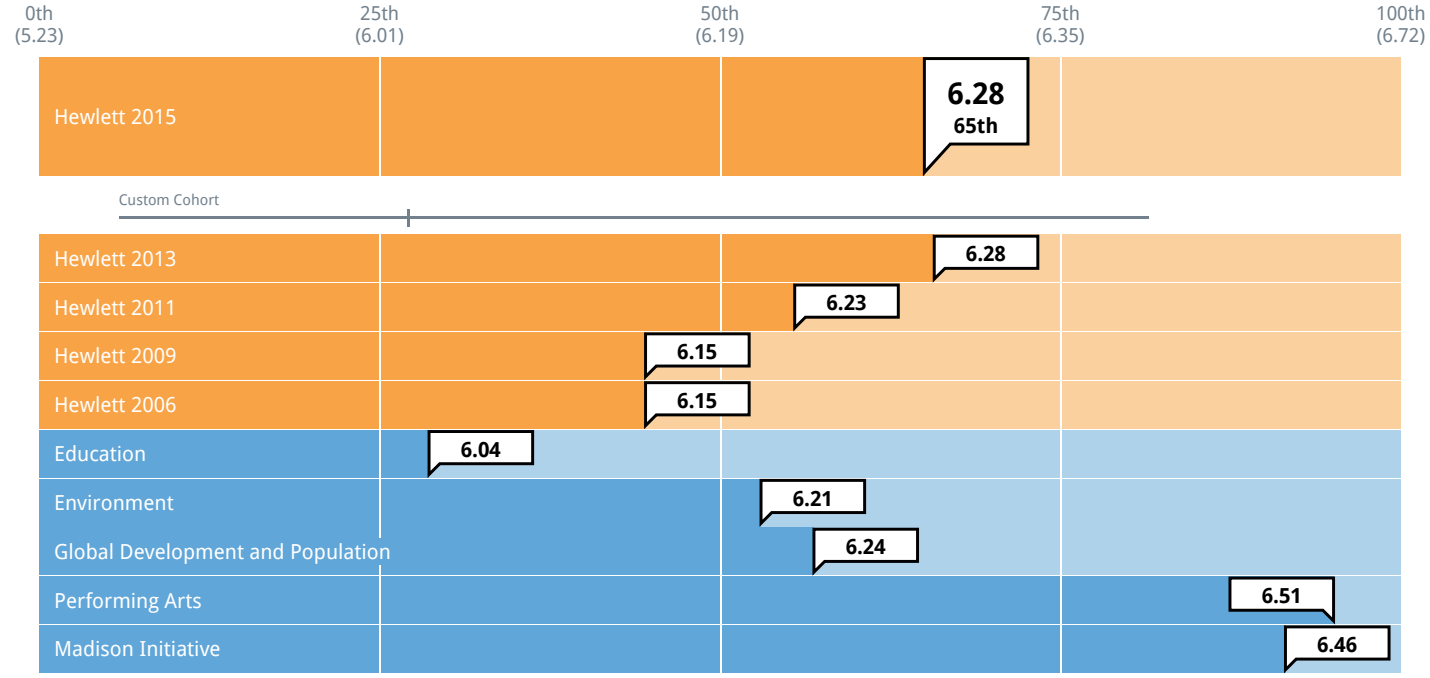
Funder-Grantee Relationships Summary Measure

The quality of interactions and the clarity and consistency of communications together create the larger construct that CEP refers to as "relationships." The relationships measure below is an average of grantee ratings on the following measures:

1. Fairness of treatment by the foundation
2. Comfort approaching the foundation if a problem arises
3. Responsiveness of foundation staff
4. Clarity of communication of the foundation's goals and strategy
5. Consistency of information provided by different communications

Funder-Grantee Relationships Summary Measure

1 = Very negative **7** = Very positive

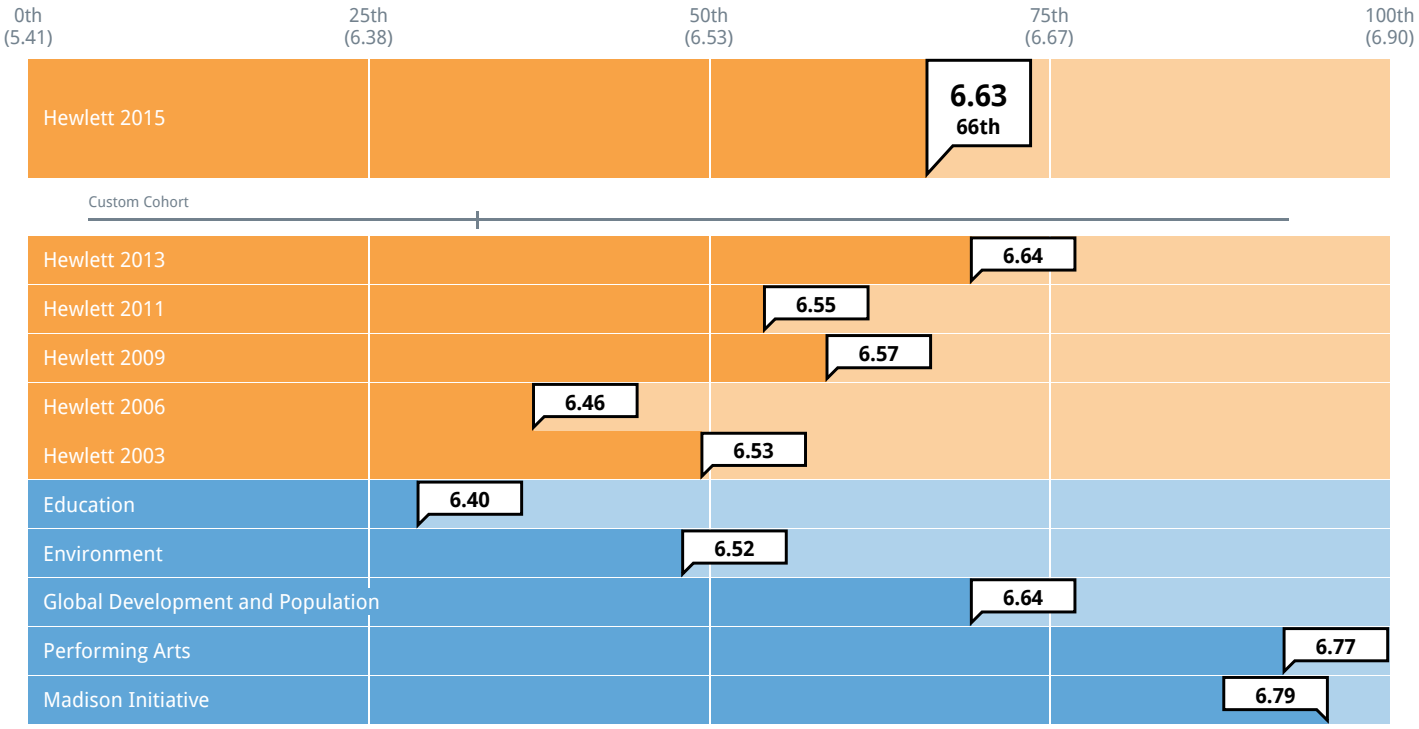


Cohort: Custom Cohort ▼ Past results: On Off Subgroup: Program Area ▼

Quality of Interactions

"Overall, how fairly did the Foundation treat you?"

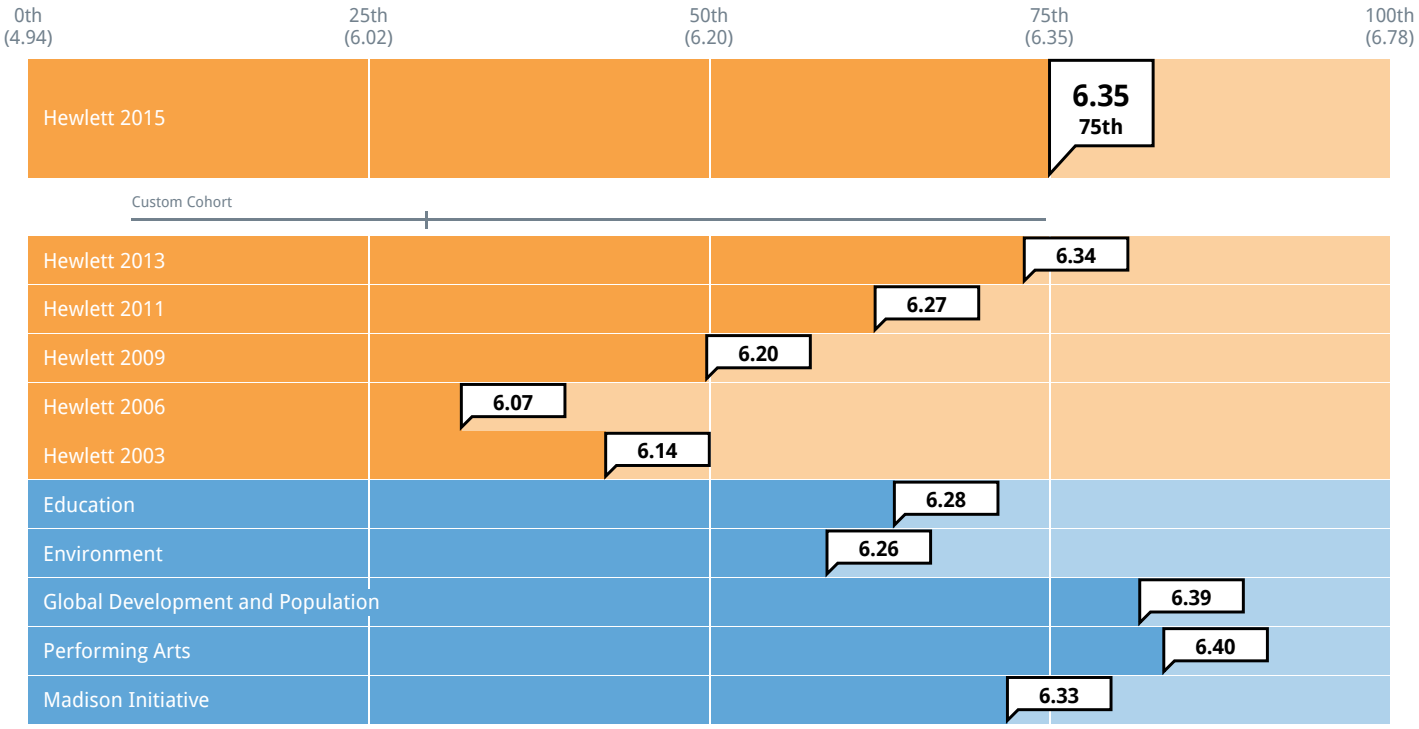
1 = Not at all fairly **7** = Extremely fairly



Cohort: Custom Cohort ▼ Past results: On Off Subgroup: Program Area ▼

"How comfortable do you feel approaching the Foundation if a problem arises?"

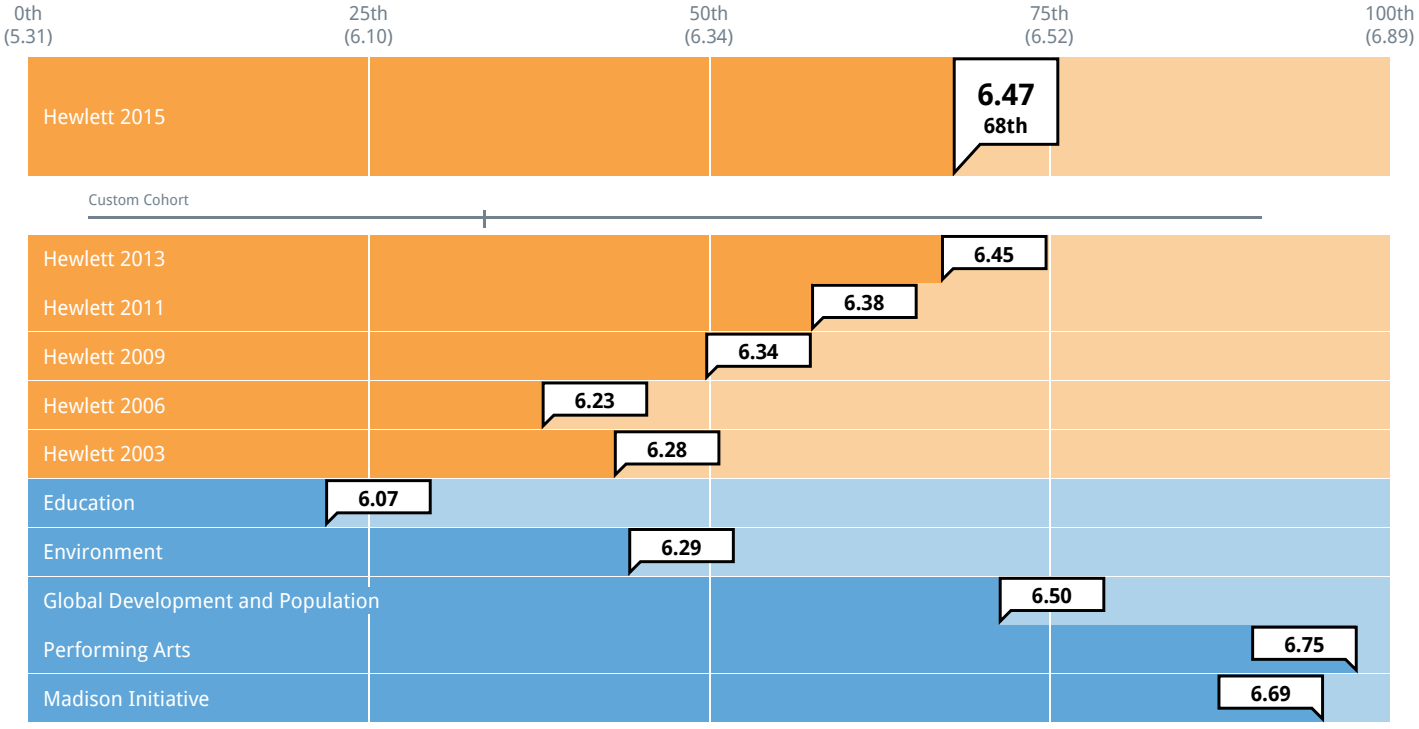
1 = Not at all comfortable **7** = Extremely comfortable



Cohort: Custom Cohort ▼ Past results: On Off Subgroup: Program Area ▼

"Overall, how responsive was the Foundation staff?"

1 = Not at all responsive **7** = Extremely responsive



Cohort: Custom Cohort ▼ Past results: On Off Subgroup: Program Area ▼

"HOW OFTEN DO/DID YOU HAVE CONTACT WITH YOUR PROGRAM OFFICER DURING THIS GRANT?"

Frequency of Contact with Program Officer (Overall)	Hewlett 2015	Hewlett 2013	Hewlett 2011	Hewlett 2009	Hewlett 2006	Hewlett 2003	Average Funder	Custom Cohort
Weekly or more often	1%	2%	1%	2%	2%	2%	3%	3%
A few times a month	9%	8%	12%	11%	10%	9%	11%	14%
Monthly	18%	17%	15%	13%	13%	12%	14%	19%
Once every few months	63%	64%	57%	57%	56%	60%	51%	52%
Yearly or less often	10%	9%	15%	16%	19%	16%	22%	12%

Frequency of Contact with Program Officer (By Subgroup)	Education	Environment	Global Development and Population	Performing Arts	Madison Initiative
Weekly or more often	0%	3%	1%	1%	0%
A few times a month	13%	12%	7%	3%	10%
Monthly	27%	22%	19%	9%	26%
Once every few months	55%	56%	65%	74%	64%
Yearly or less often	5%	7%	8%	14%	0%

"WHO MOST FREQUENTLY INITIATED THE CONTACT YOU HAD WITH YOUR PROGRAM OFFICER?"

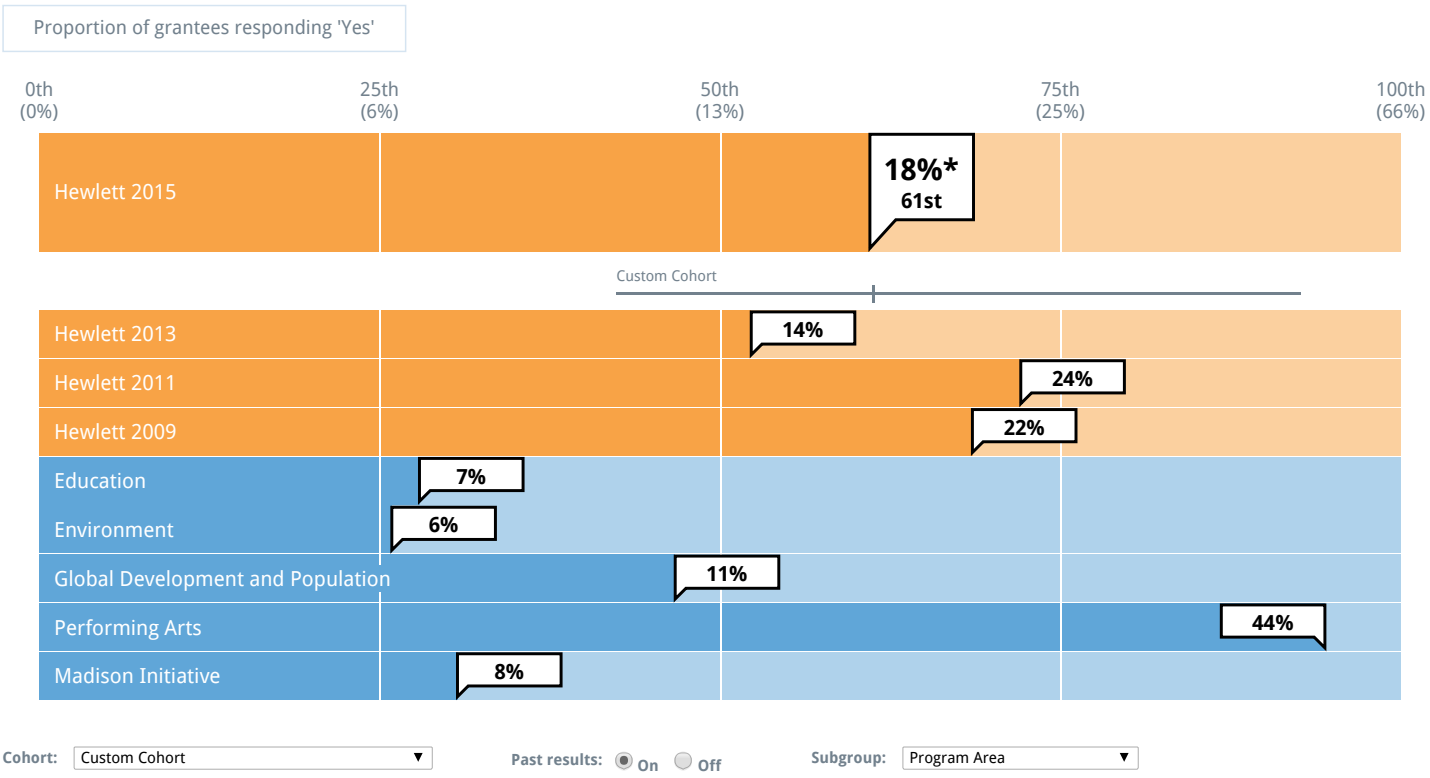
Initiation of Contact with Program Officer (Overall)	Hewlett 2015	Hewlett 2013	Hewlett 2011	Hewlett 2009	Hewlett 2006	Average Funder	Custom Cohort
Program Officer	11%	11%	10%	9%	9%	15%	12%
Both of equal frequency	59%	58%	61%	51%	52%	49%	52%
Grantee	31%	31%	29%	40%	39%	36%	36%

Initiation of Contact with Program Officer (By Subgroup)	Education	Environment	Global Development and Population	Performing Arts	Madison Initiative
Program Officer	7%	3%	15%	12%	14%
Both of equal frequency	63%	53%	59%	60%	70%
Grantee	30%	44%	26%	28%	16%

Behind the numbers: Hewlett grantees who are in contact with their program officer monthly or more frequently rate the Foundation significantly more positively than grantees who are in contact with the Foundation every few months or less frequently for the quality of the funder-grantee relationship and overall funder transparency.

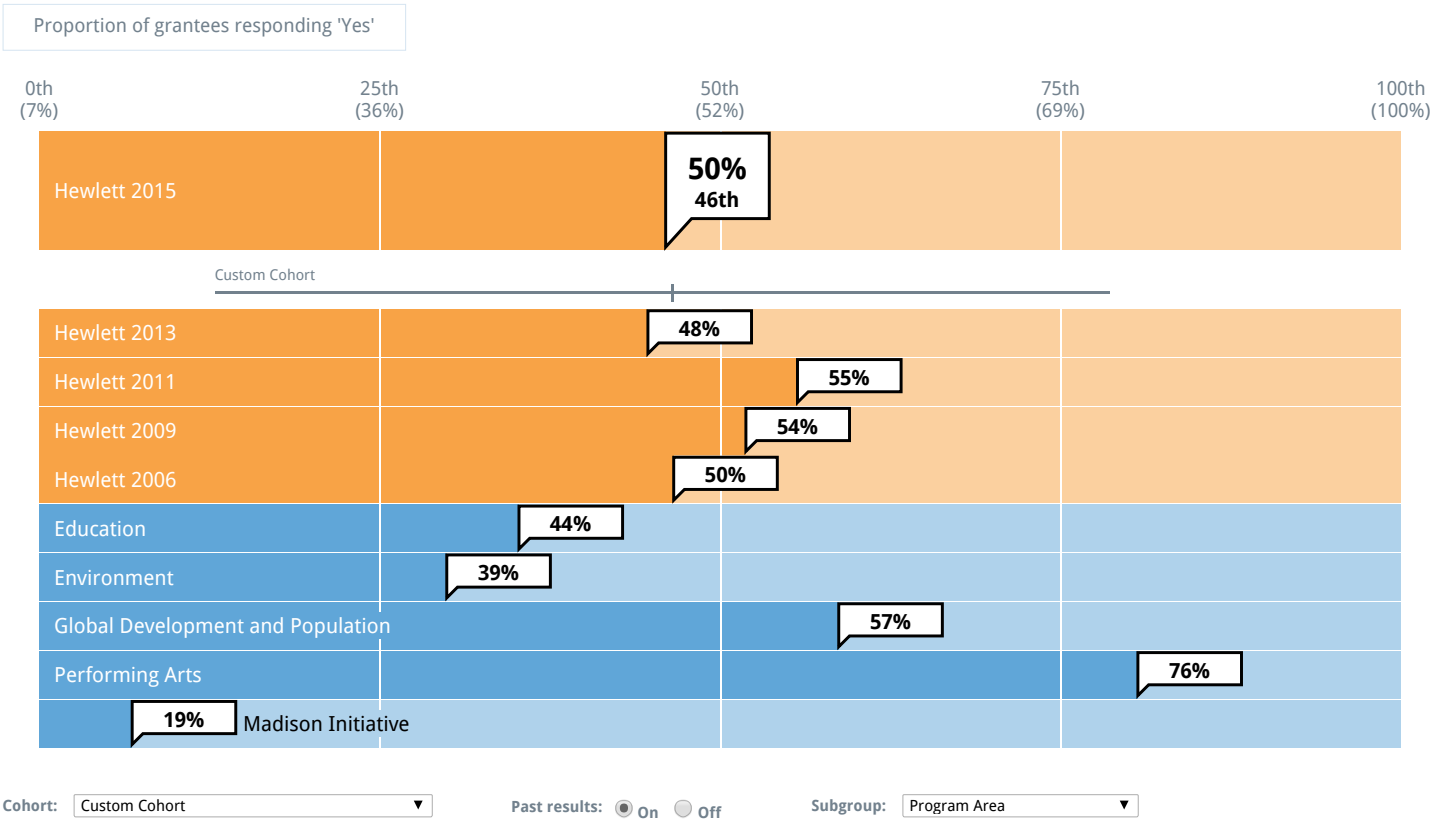
Contact Change and Site Visits

"Has your main contact at the Foundation changed in the past six months?"



Cohort: Custom Cohort ▼ Past results: On Off Subgroup: Program Area ▼

"Did the Foundation conduct a site visit during the course of this grant?"



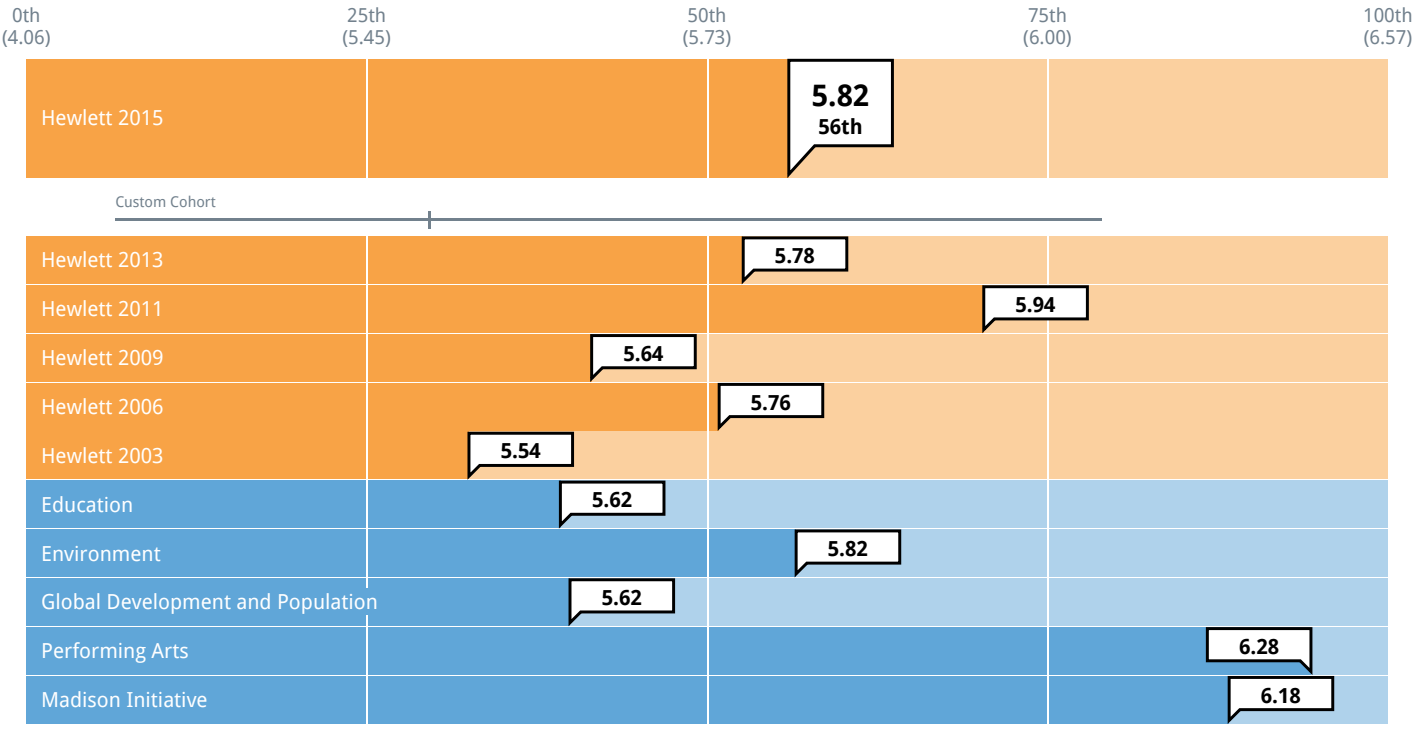
Cohort: Custom Cohort ▼ Past results: On Off Subgroup: Program Area ▼

Behind the numbers: Hewlett grantees that report receiving a site visit rate the Foundation significantly more positively than grantees that did not have a site visit for the quality of the funder-grantee relationship.

Foundation Communication

"How clearly has the Foundation communicated its goals and strategy to you?"

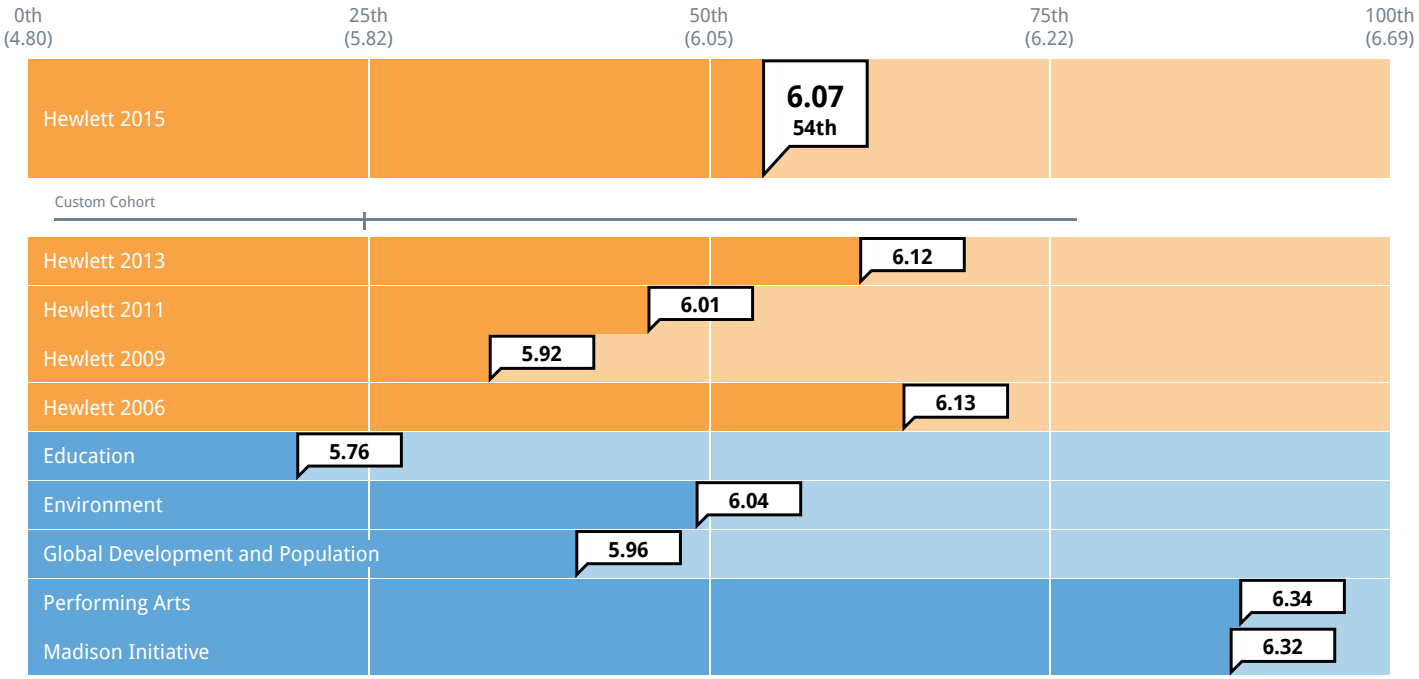
1 = Not at all clearly **7** = Extremely clearly



Cohort: Custom Cohort ▼ Past results: On Off Subgroup: Program Area ▼

"How consistent was the information provided by different communications resources, both personal and written, that you used to learn about the Foundation?"

1 = Not at all consistent **7** = Completely consistent



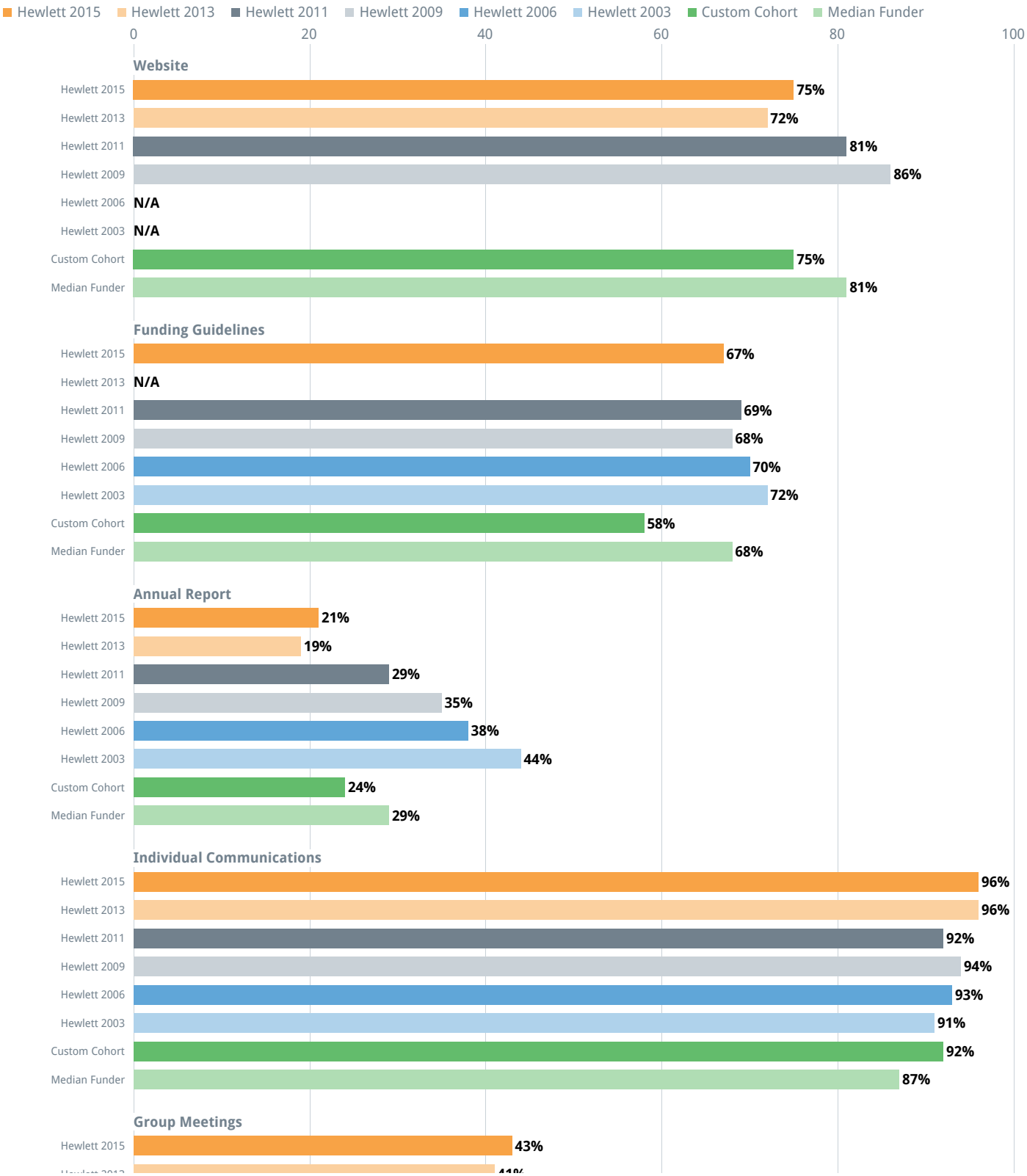
Cohort: Custom Cohort ▼ Past results: On Off Subgroup: Program Area ▼

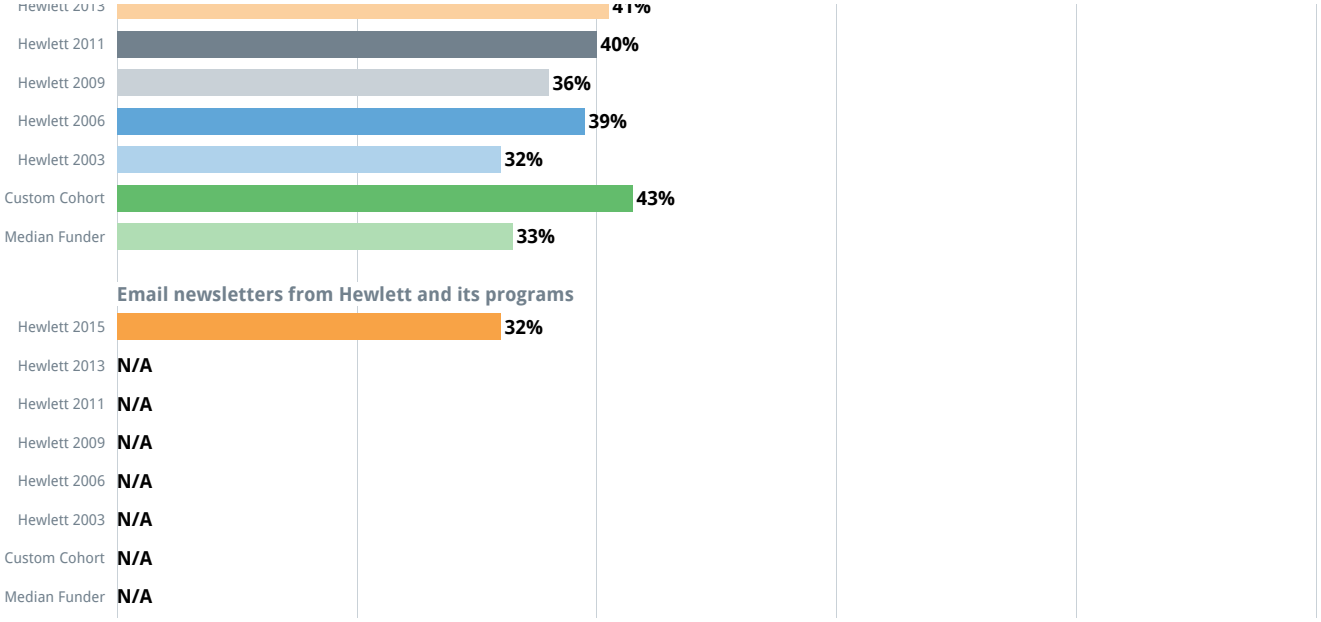
Communication Resources

Grantees were asked whether they used each of the following communications resources from Hewlett and how helpful they found each resource. This chart shows the proportion of grantees who have used each resource.

"Please indicate whether you used any of the following resources, and if so how helpful you found each."

Usage of Communication Resources - Overall

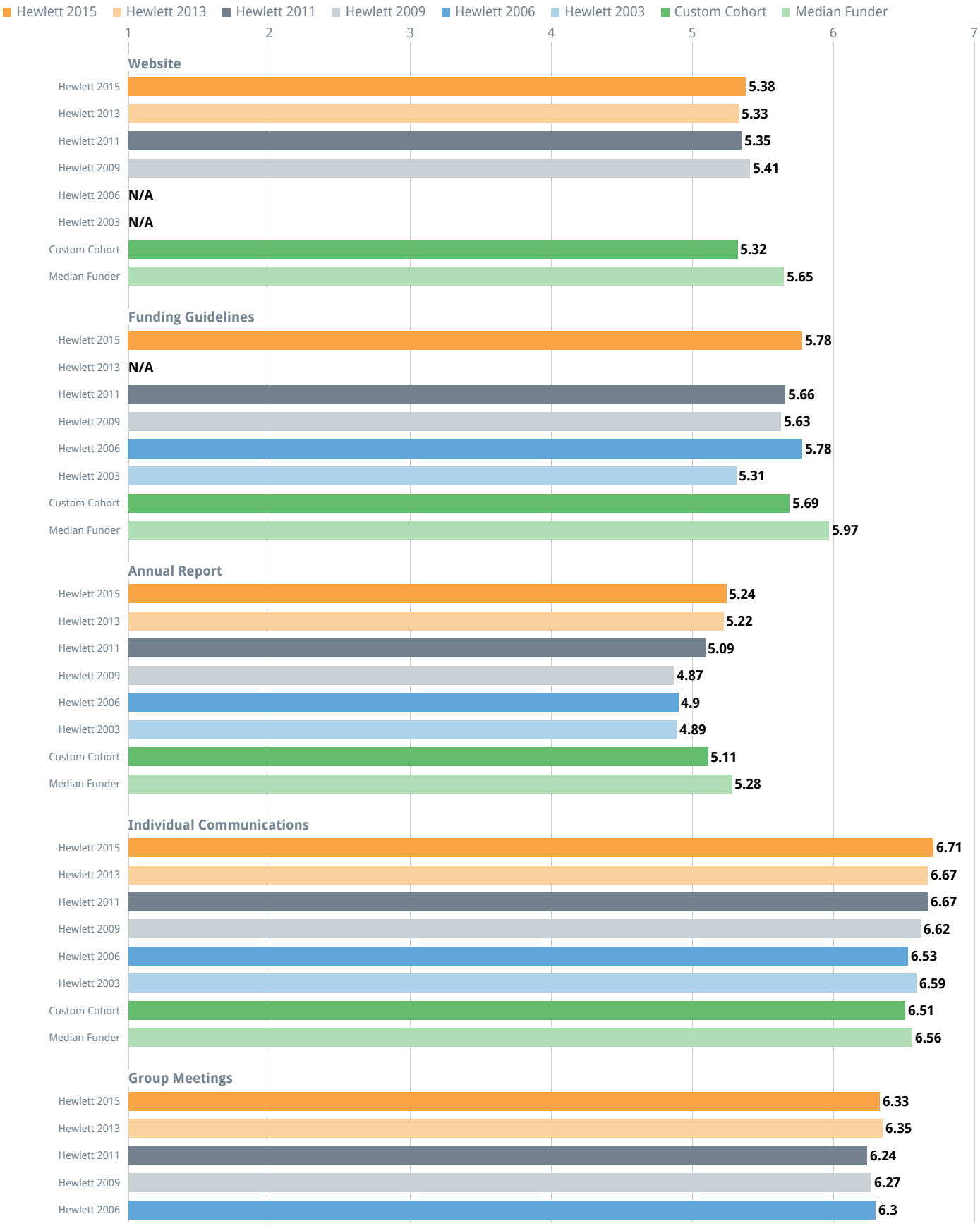


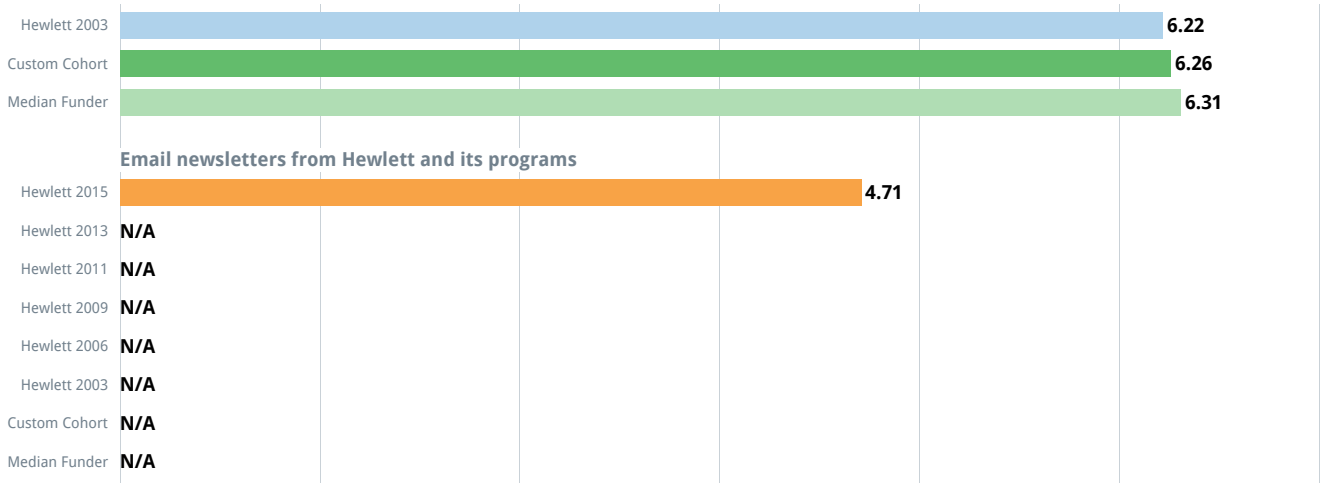


Email newsletters from Hewlett and its programs

The chart below shows the perceived helpfulness of each resource, where 1 = "Not at all helpful" and 7 = "Extremely helpful."

Helpfulness of Communication Resources - Overall

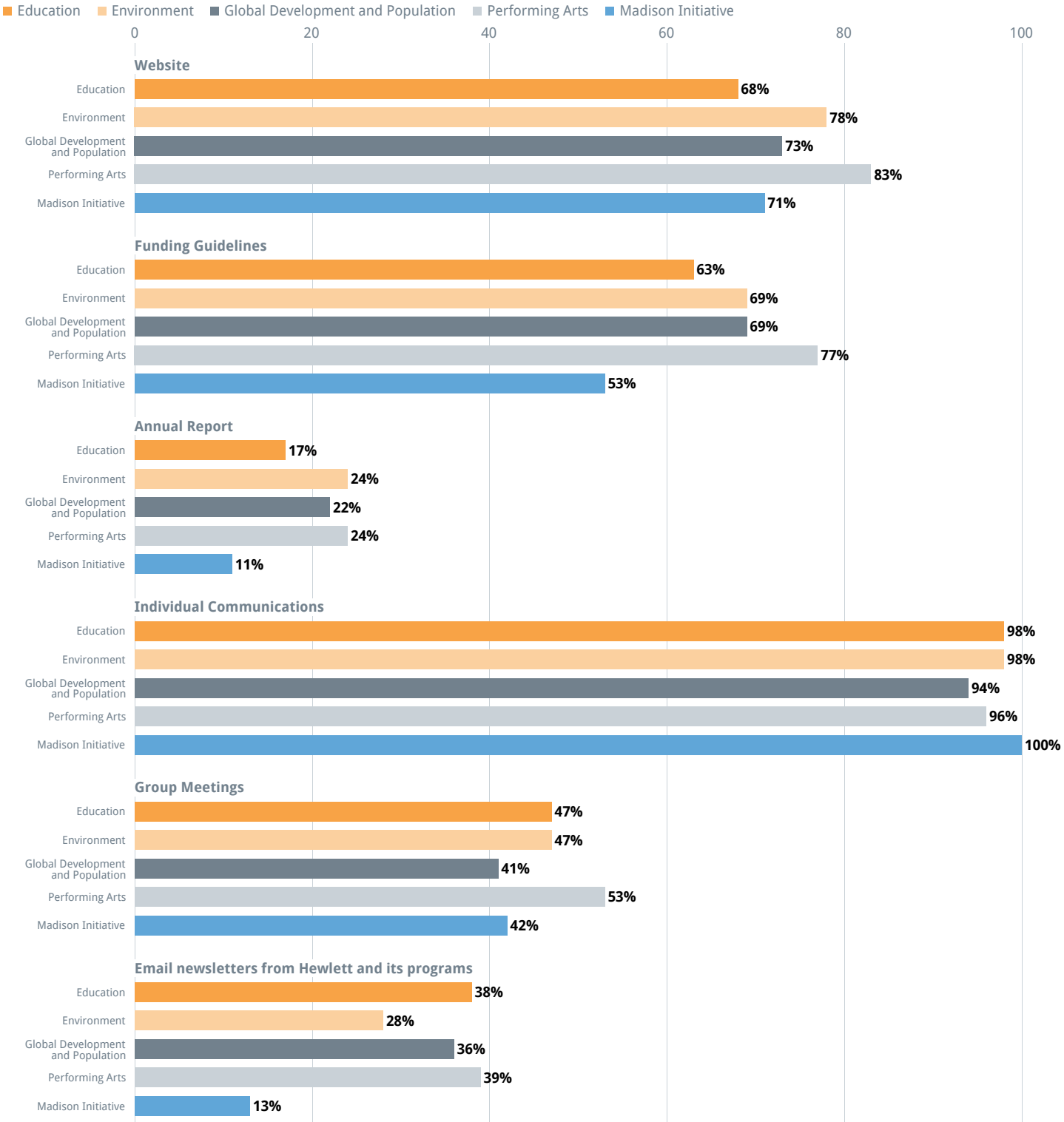



Hewlett 2003
6.22
Custom Cohort
6.26
Median Funder
6.31
Email newsletters from Hewlett and its programs
Hewlett 2015
4.71
Hewlett 2013
N/A
Hewlett 2011
N/A
Hewlett 2009
N/A
Hewlett 2006
N/A
Hewlett 2003
N/A
Custom Cohort
N/A
Median Funder
N/A

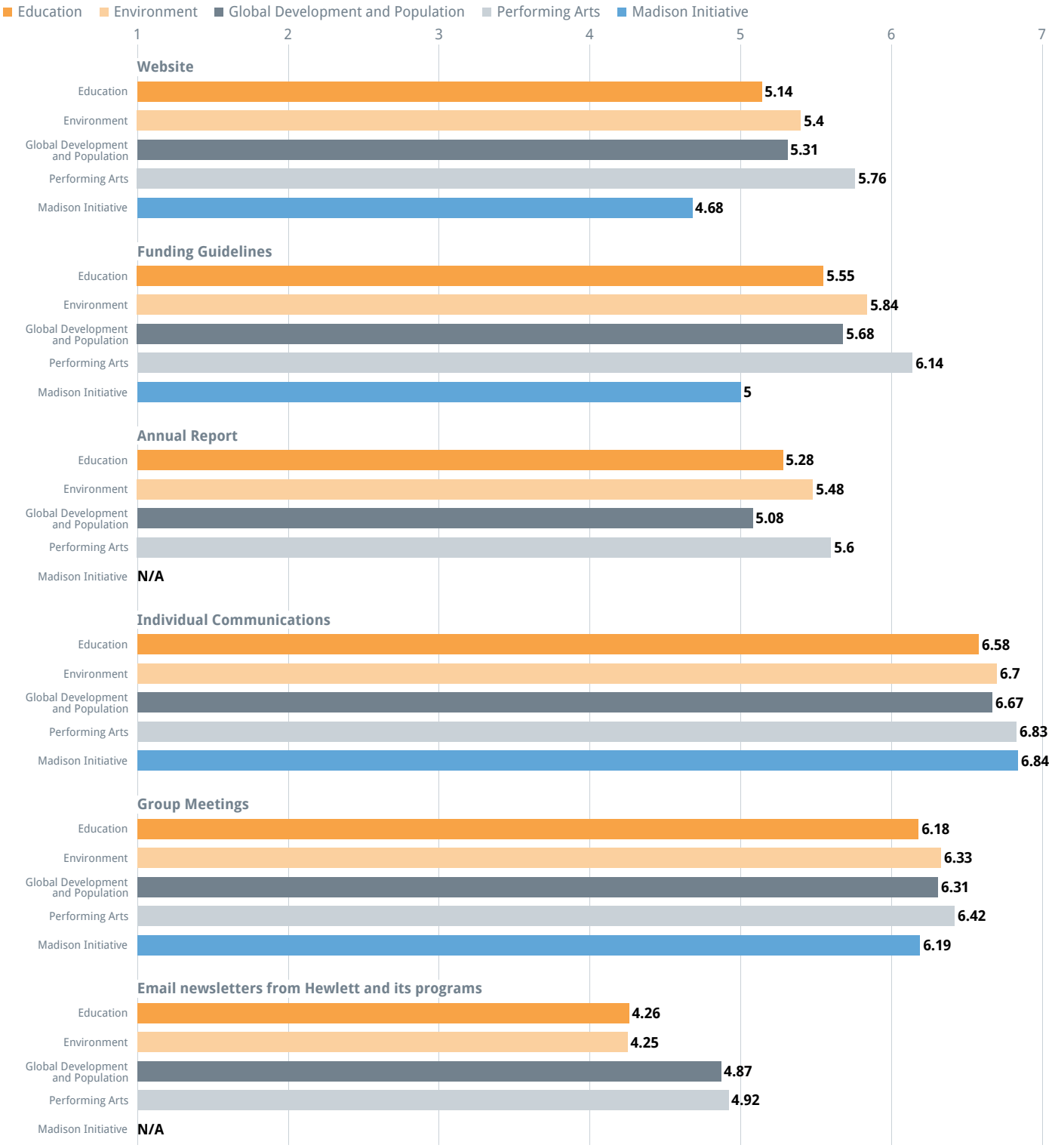
The following charts show the usage and helpfulness of communications resources segmented by subgroup.

"Please indicate whether you used any of the following resources, and if so how helpful you found each."

Usage of Communication Resources - By Subgroup



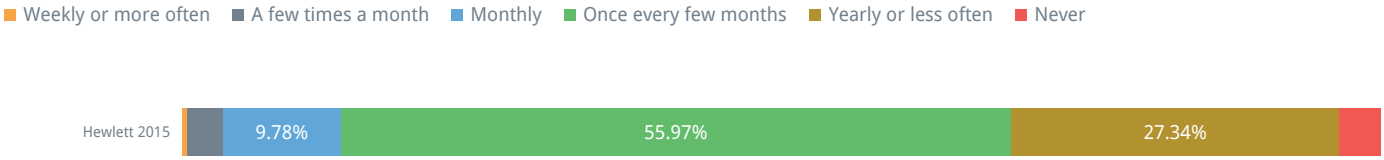
Helpfulness of Communication Resources - By Subgroup



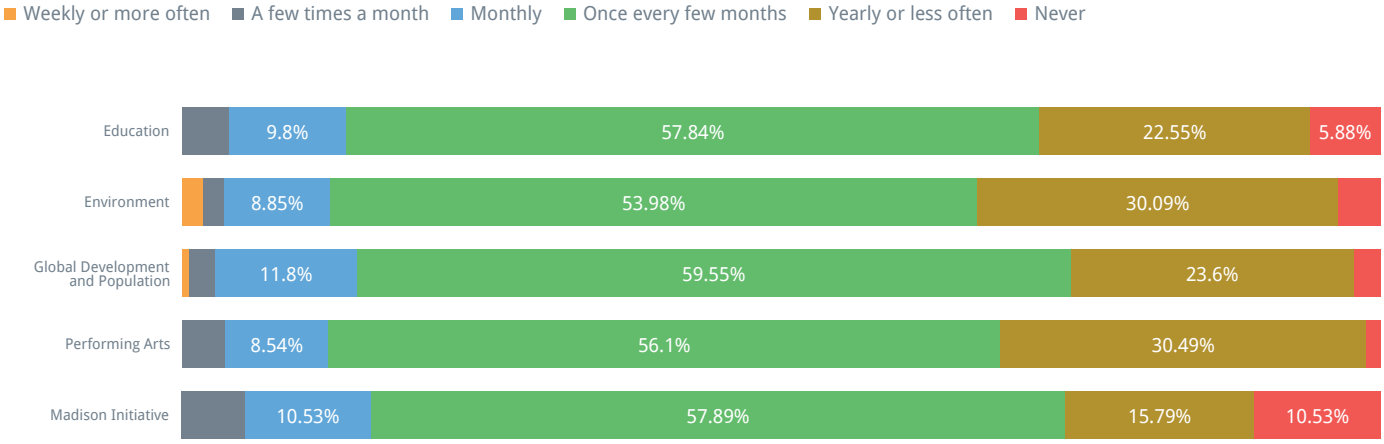
Additional Questions Related to Communication and Resources

"How often do you visit the Hewlett website?"

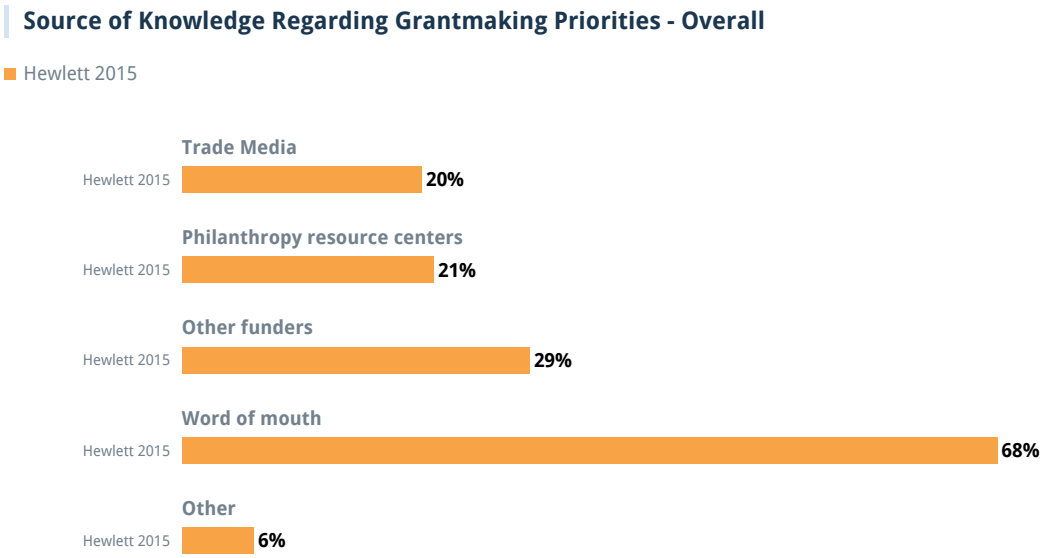
Frequency of Website Usage - Overall



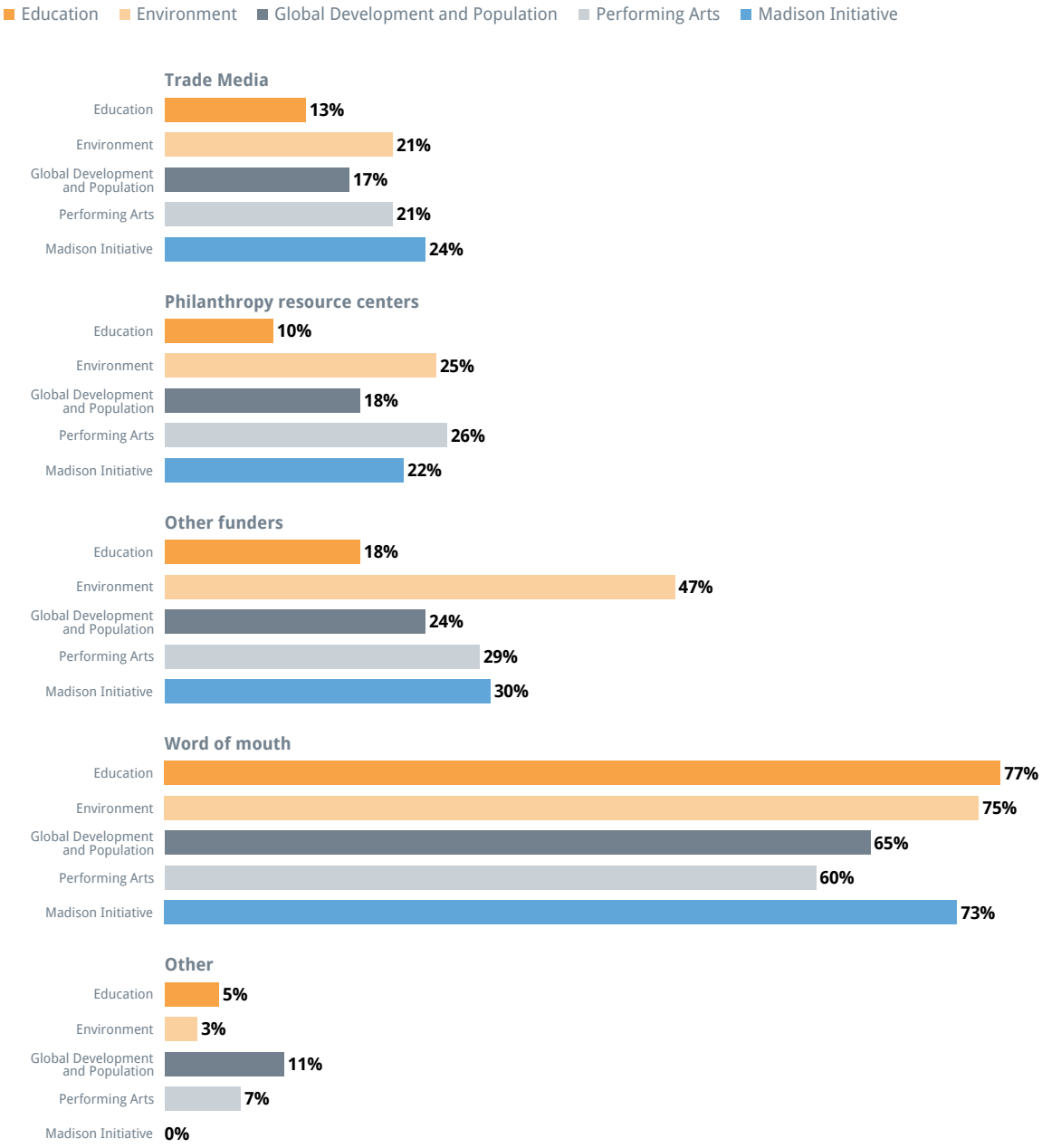
Frequency of Website Usage - By Subgroup



"Apart from direct interaction with Hewlett staff, how do you learn about the Foundation's grantmaking priorities?"



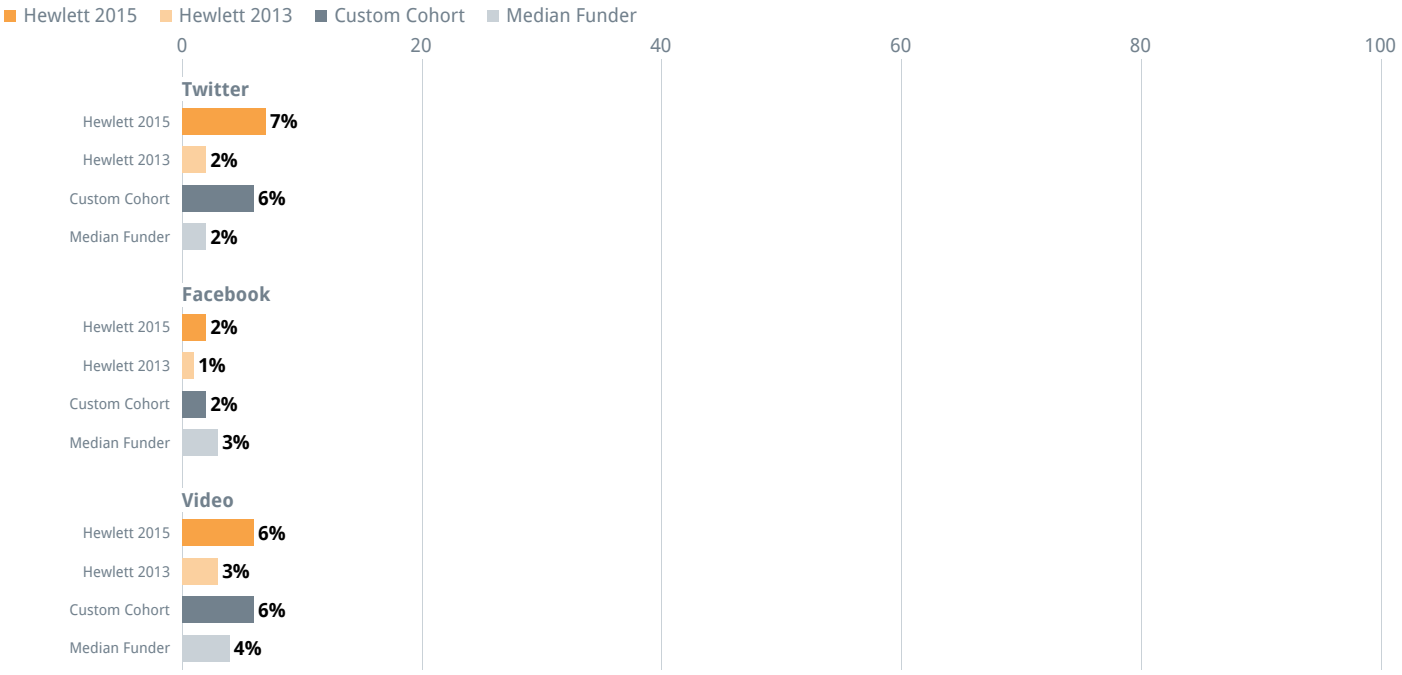
Source of Knowledge Regarding Grantmaking Priorities - By Subgroup



Social Media

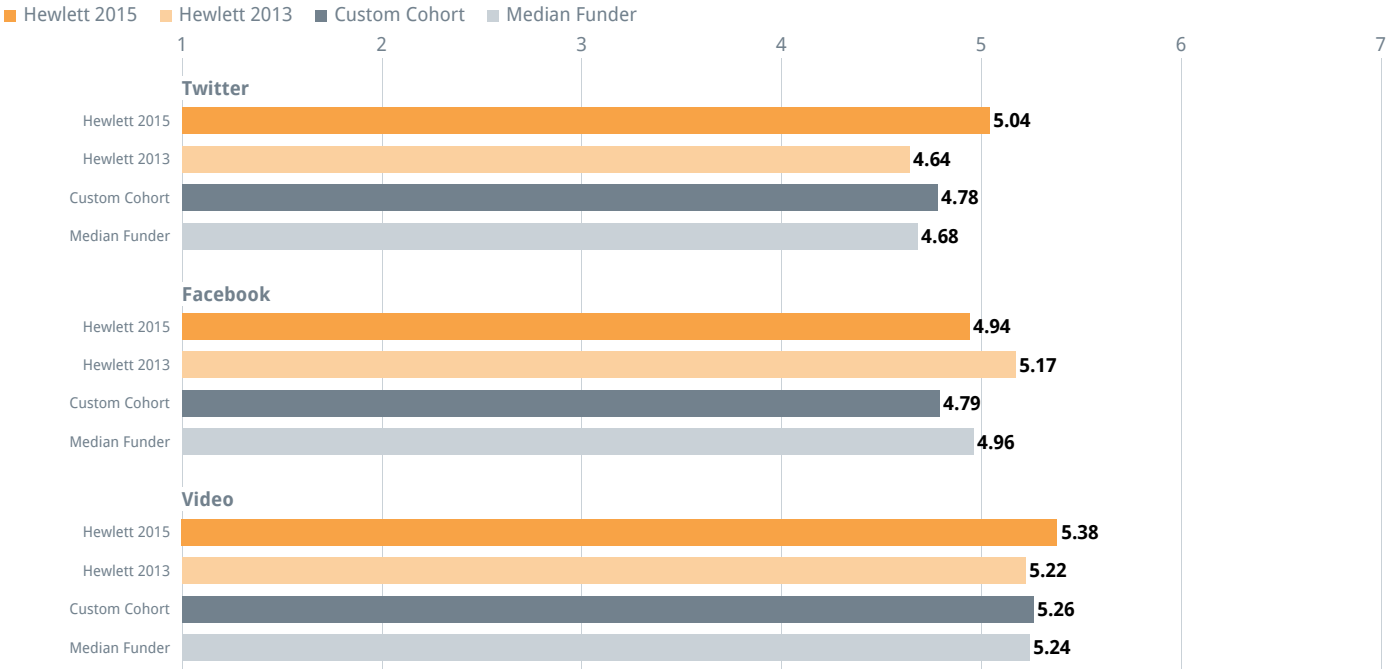
Grantees were asked whether they used each of the following communications resources from Hewlett and how helpful they found each resource. This chart shows the proportion of grantees who have used each resource.

Usage of Communication Resources - Overall



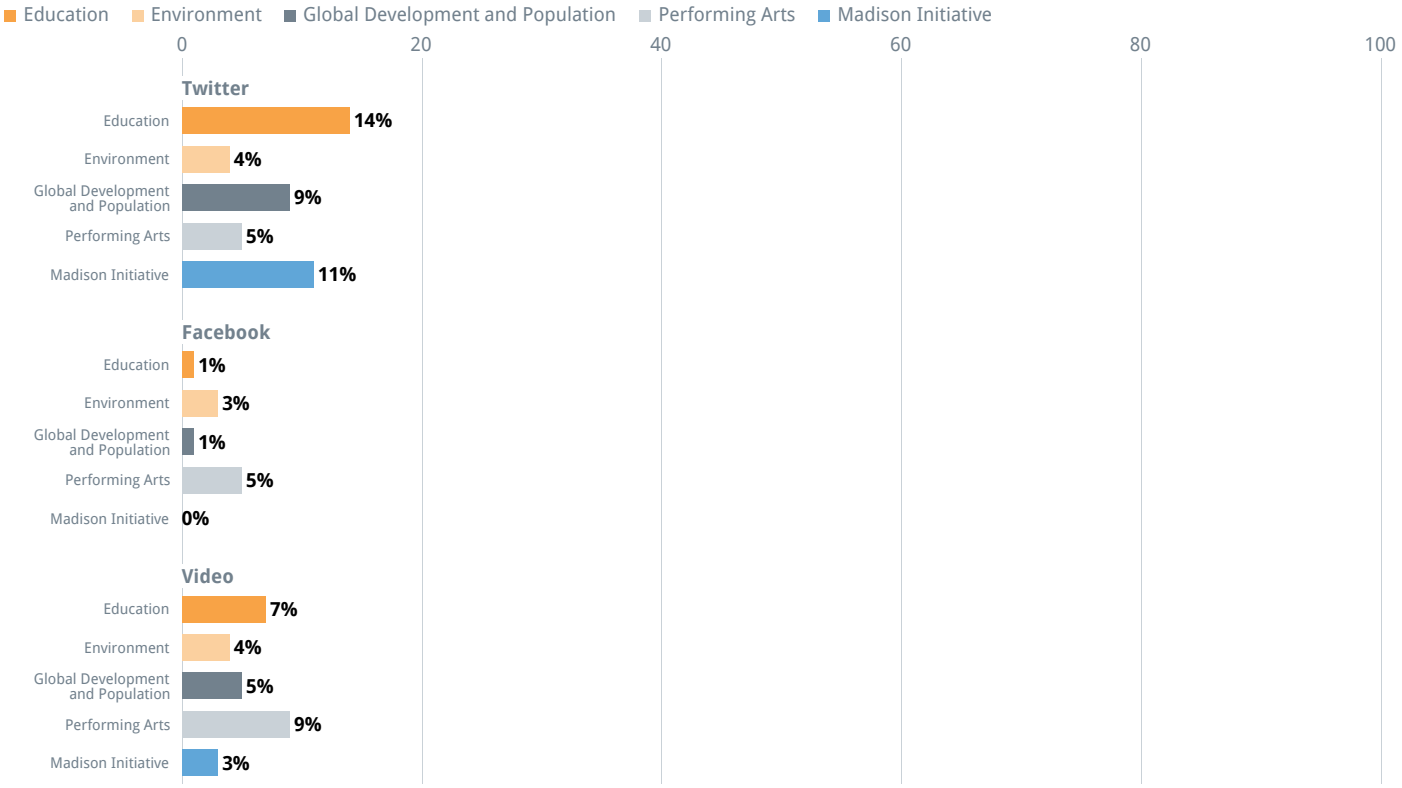
The chart below shows the perceived helpfulness of each resource, where 1 = "Not at all helpful" and 7 = "Extremely helpful."

Helpfulness of Communication Resources - Overall

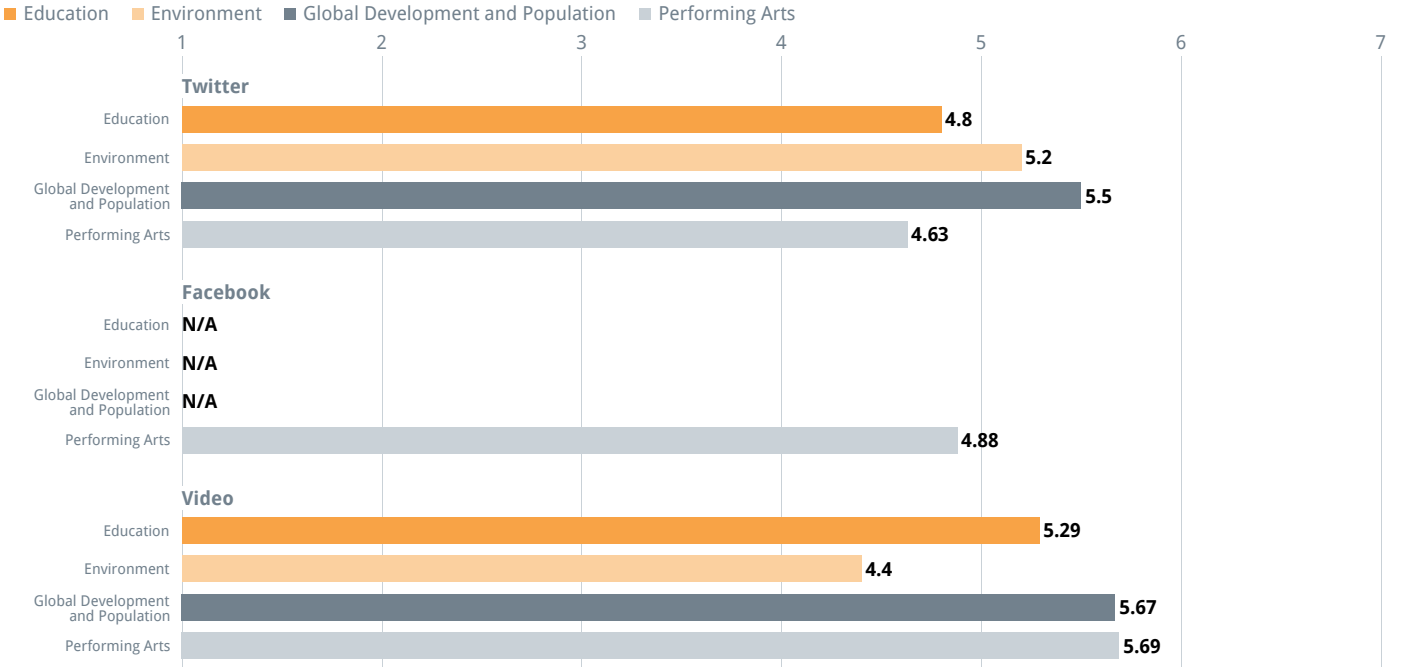


The charts below show the usage and perceived helpfulness of social media segmented by subgroup.

Usage of Communication Resources - By Subgroup



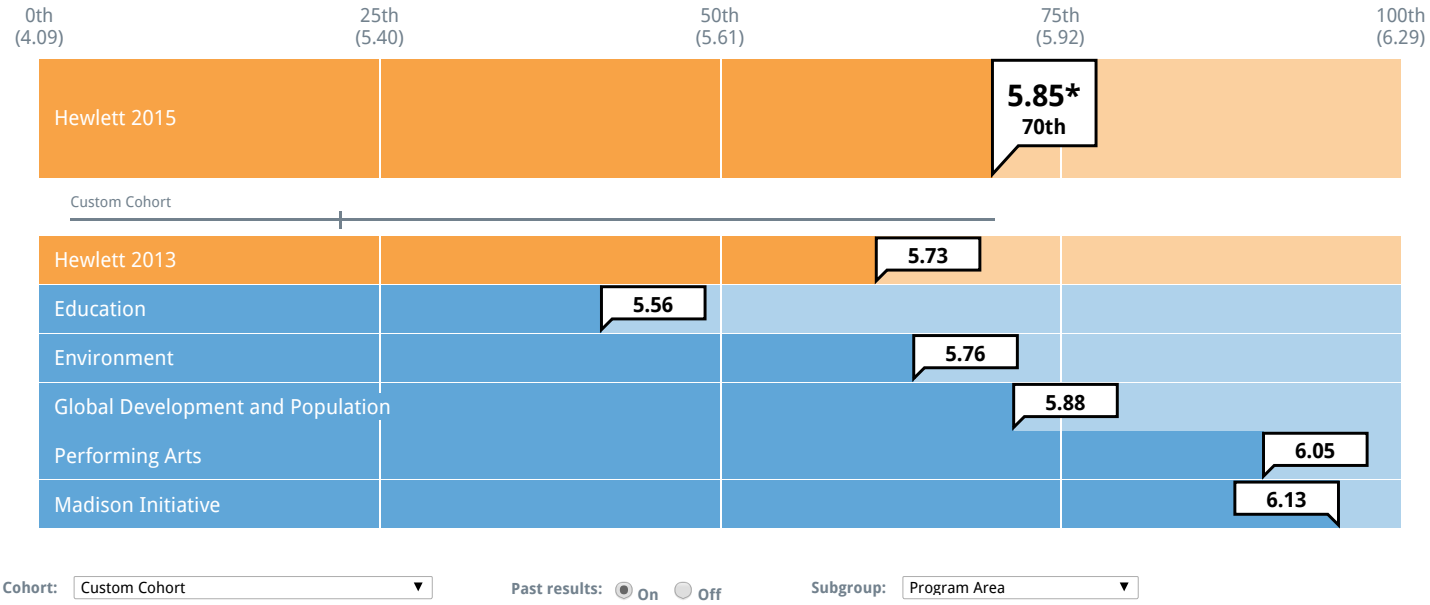
Helpfulness of Communication Resources - By Subgroup



Funder Transparency

"Overall how transparent is the Foundation with your organization?"

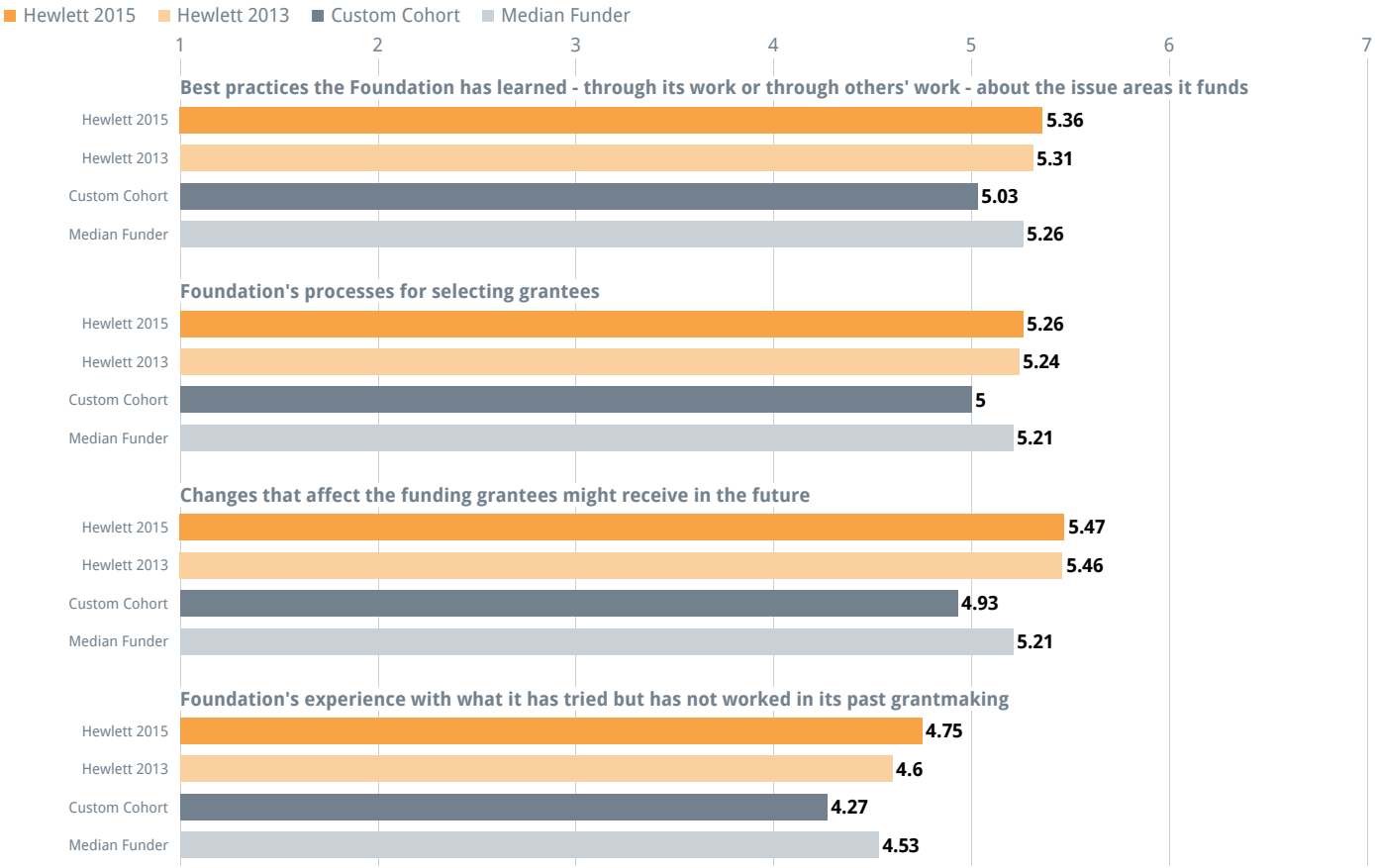
1 = Not at all transparent **7** = Extremely transparent



Cohort: Custom Cohort ▼ Past results: On Off Subgroup: Program Area ▼

Grantees were asked to rate how transparent Hewlett is in the following areas, where 1 = "Not at all transparent" and 7 = "Extremely transparent."

Foundation Transparency - Overall

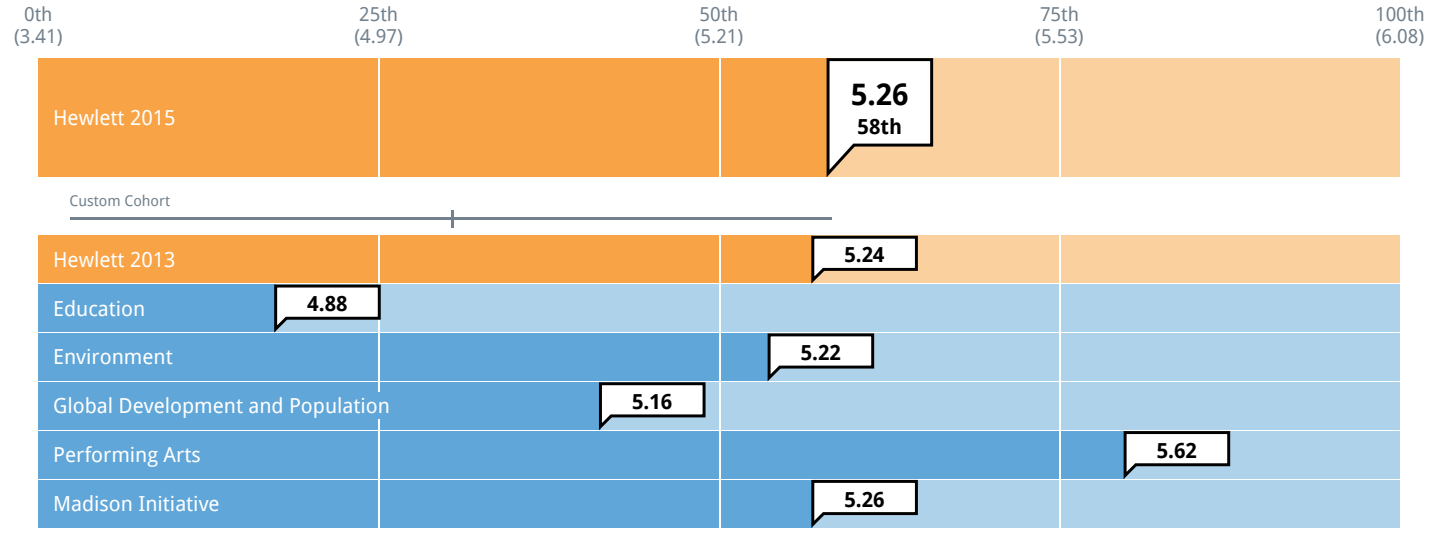


Aspects of Funder Transparency

The charts below show grantee ratings of Hewlett's transparency in specific areas of its work.

The Foundation's processes for selecting grantees

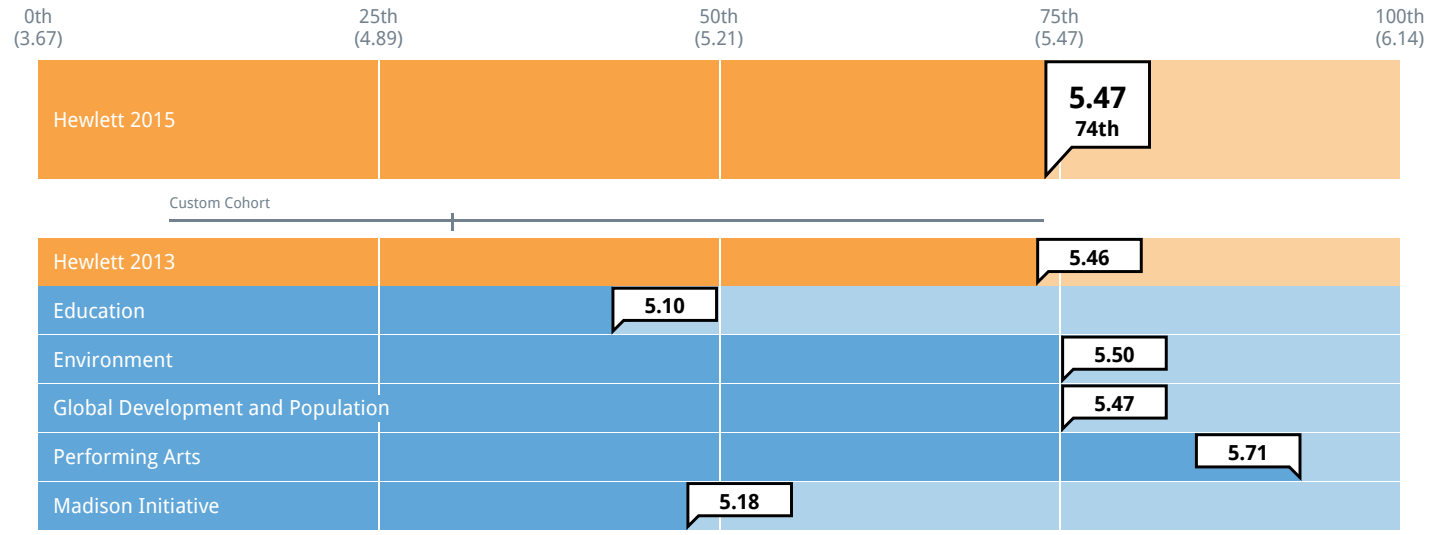
1 = Not at all transparent **7** = Extremely transparent



Cohort: Custom Cohort ▼ Past results: On Off Subgroup: Program Area ▼

Any changes that affect the funding your organization might receive in the future

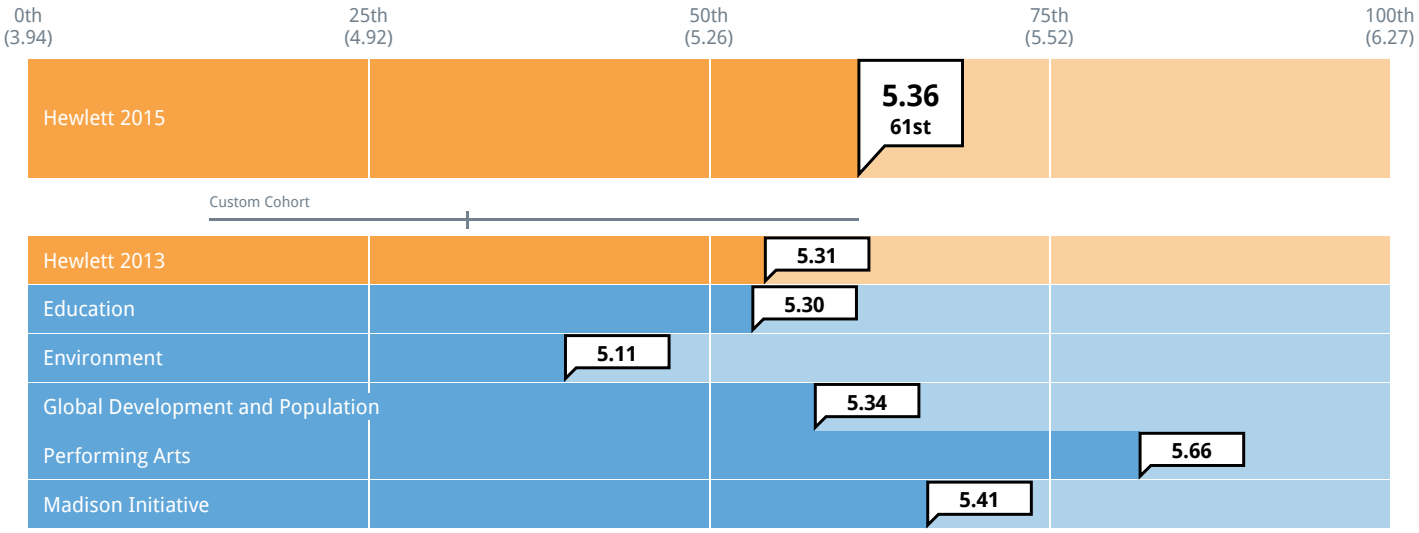
1 = Not at all transparent **7** = Extremely transparent



Cohort: Custom Cohort ▼ Past results: On Off Subgroup: Program Area ▼

Best practices the Foundation has learned - through its work or through others' work - about the issue areas it funds

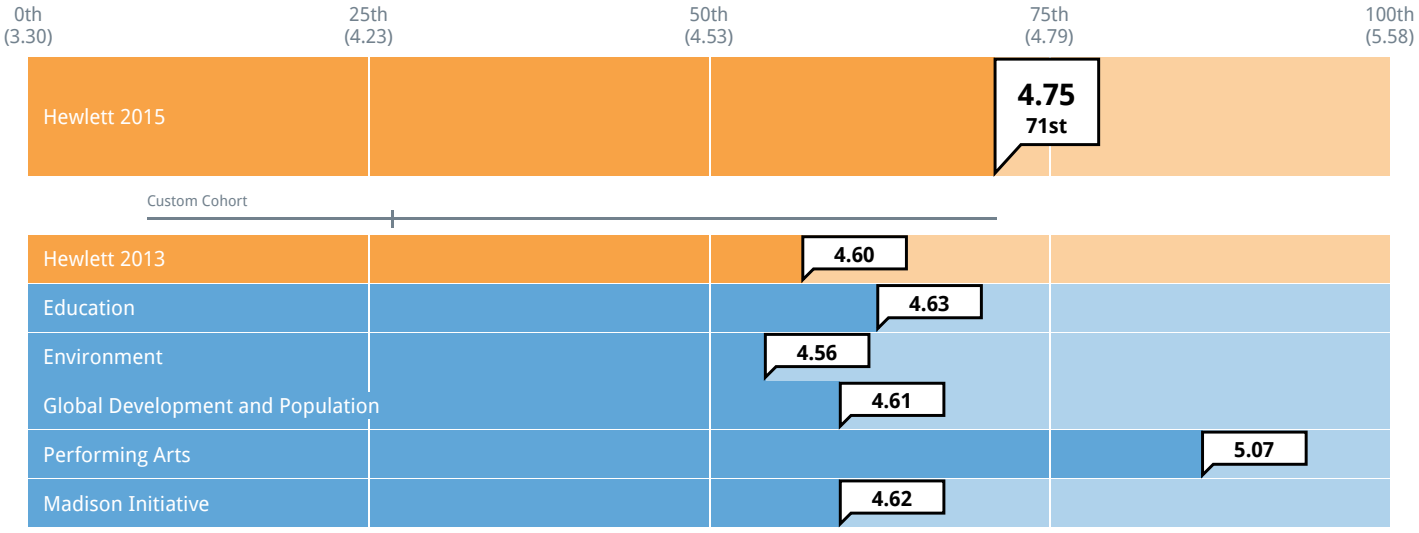
1 = Not at all transparent **7** = Extremely transparent



Cohort: Custom Cohort ▼ Past results: On Off Subgroup: Program Area ▼

The Foundation's experiences with what it has tried but has not worked in its past grantmaking

1 = Not at all transparent **7** = Extremely transparent

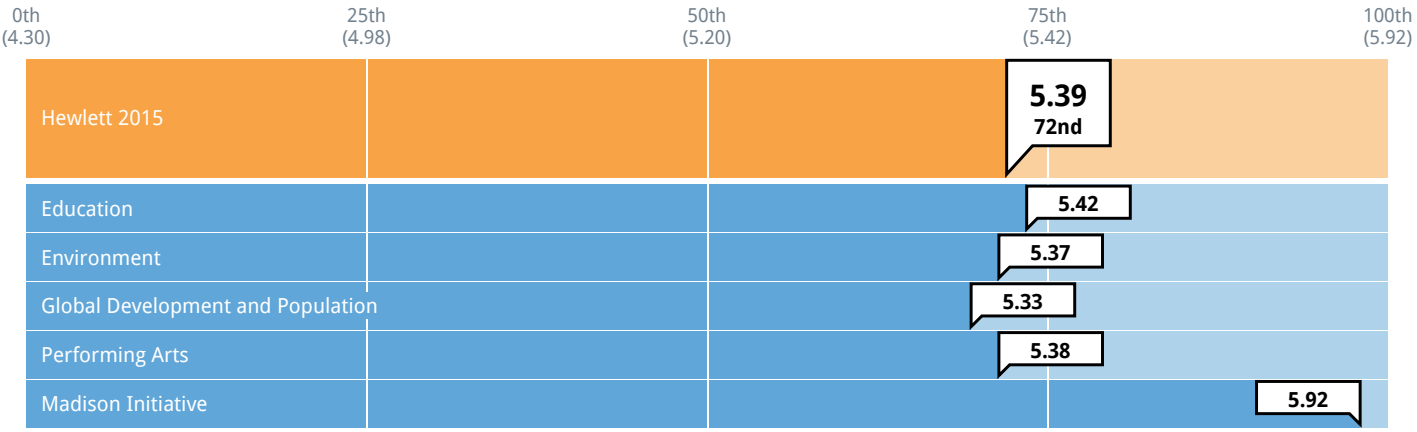


Cohort: Custom Cohort ▼ Past results: On Off Subgroup: Program Area ▼

Openness to Ideas from Grantees

"To what extent is the Foundation open to ideas from grantees about its strategy?"

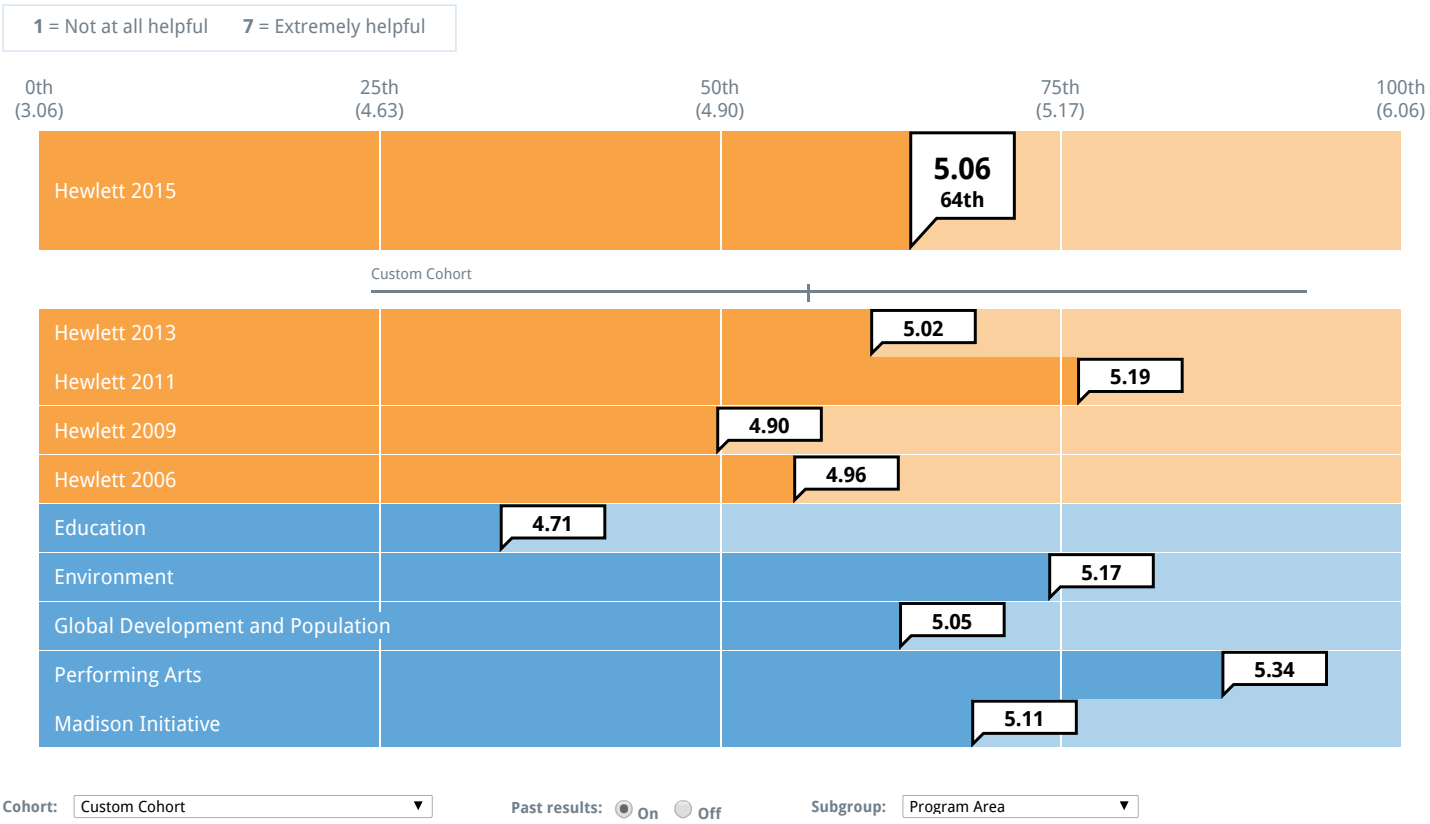
1 = Not at all **7** = To a great extent



Cohort: None ▼ Past results: On Off Subgroup: Program Area ▼

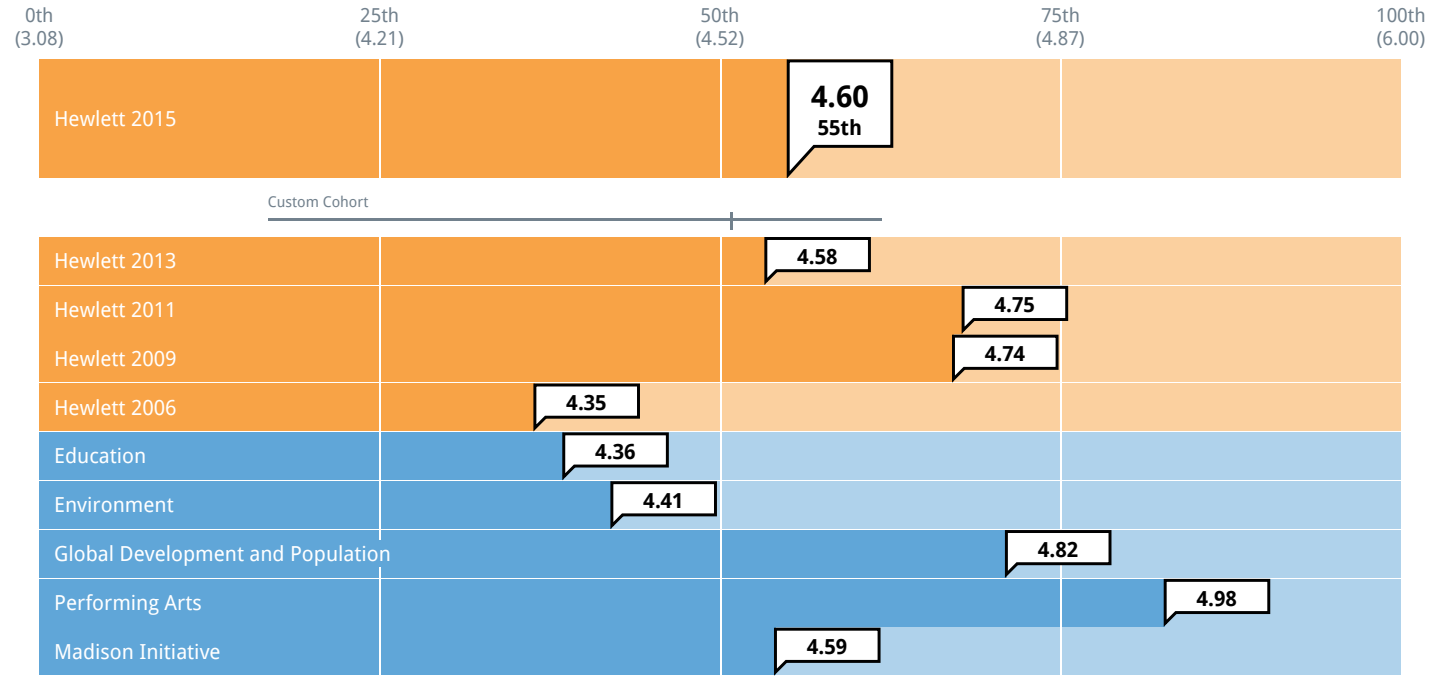
GRANT PROCESSES

"How helpful was participating in the Foundation's selection process in strengthening the organization/ program funded by the grant?"



"How helpful was participating in the Foundation's reporting/evaluation process in strengthening the organization/program funded by the grant?"

1 = Not at all helpful **7** = Extremely helpful



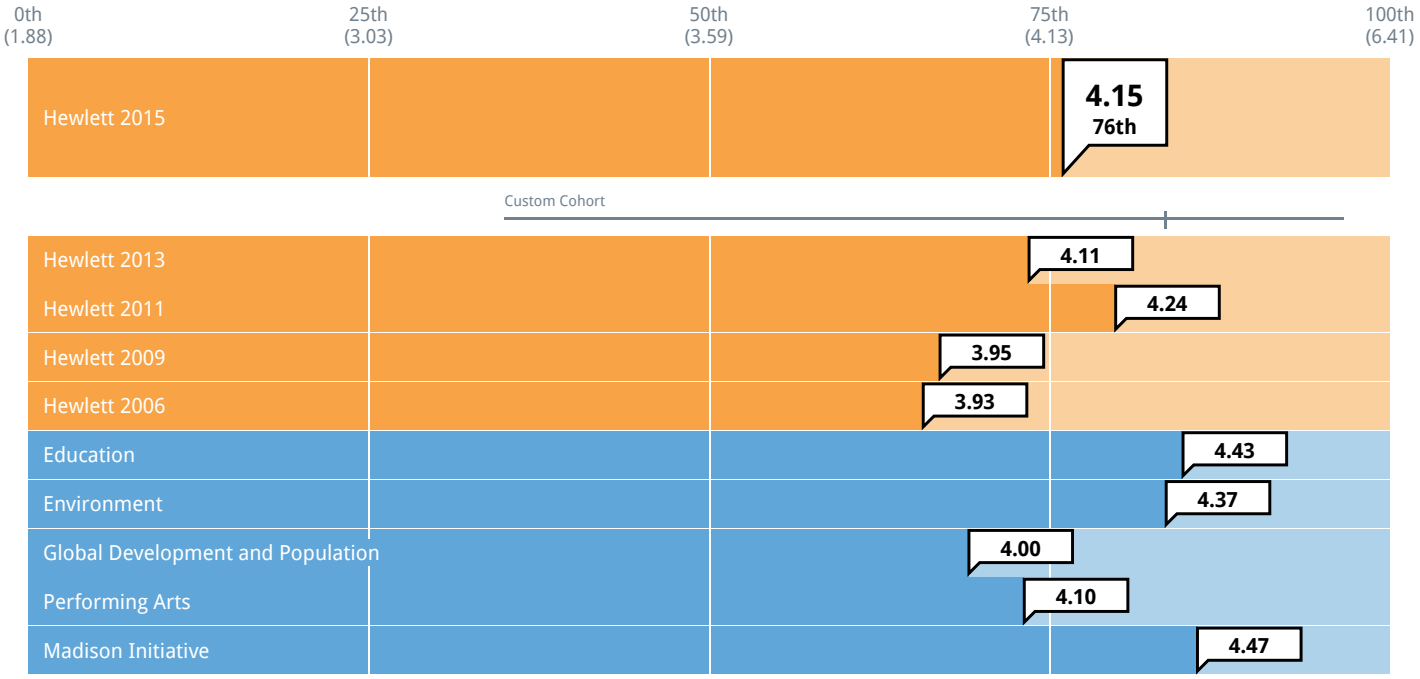
Cohort: Custom Cohort ▼ Past results: On Off Subgroup: Program Area ▼

Selection Process

Did you submit a proposal for this grant? (Overall)	Hewlett 2015	Hewlett 2013	Hewlett 2011	Hewlett 2009	Hewlett 2006	Hewlett 2003	Average Funder	Custom Cohort
Submitted a Proposal	98%	97%	96%	97%	98%	98%	93%	96%
Did Not Submit a Proposal	2%	3%	4%	3%	2%	2%	7%	4%

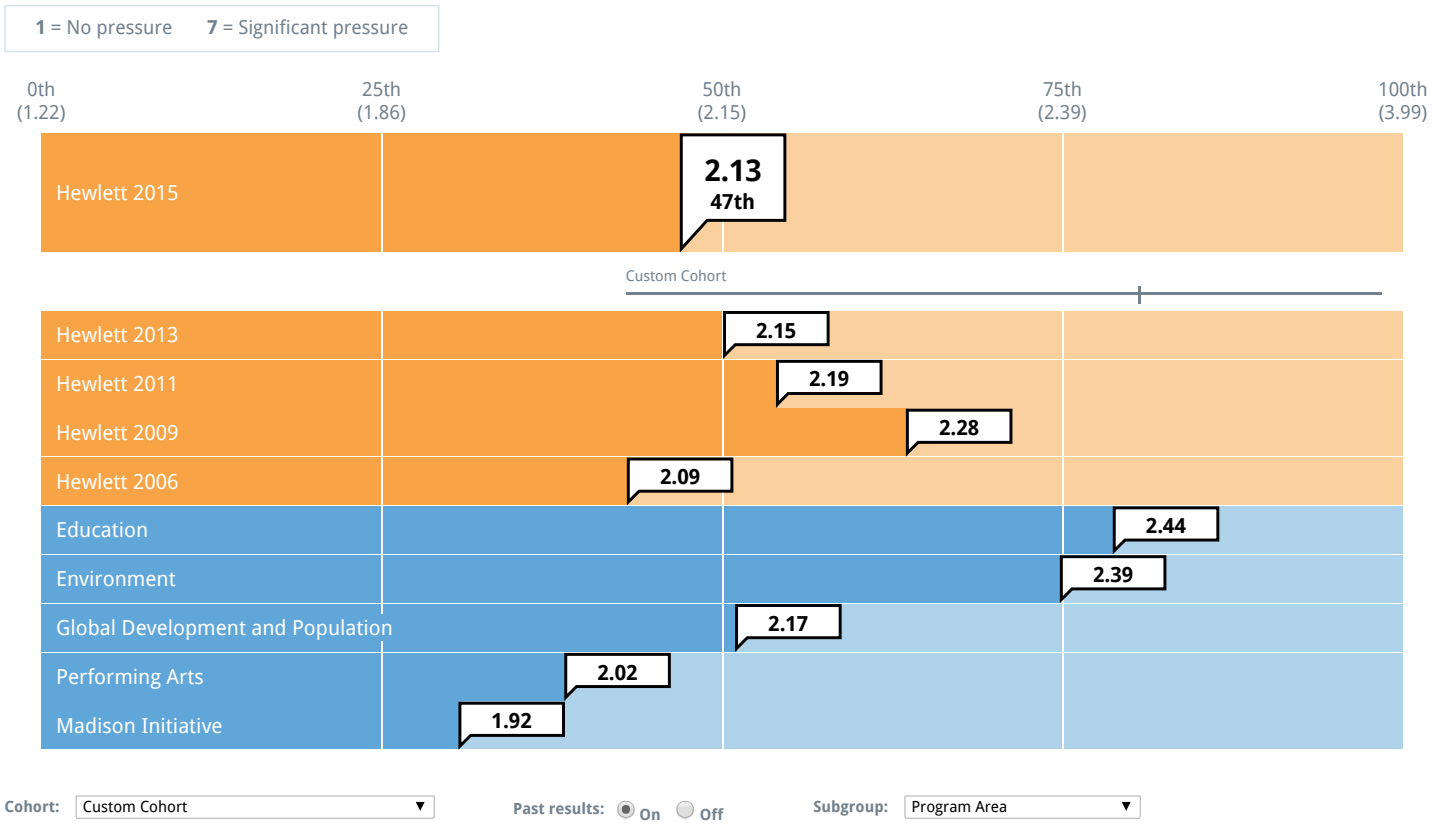
"How involved was the Foundation staff in the development of your proposal?"

1 = No involvement **7** = Substantial involvement



Cohort: Custom Cohort ▼ Past results: On Off Subgroup: Program Area ▼

"As you developed your grant proposal, how much pressure did you feel to modify your organization's priorities in order to create a grant proposal that was likely to receive funding?"



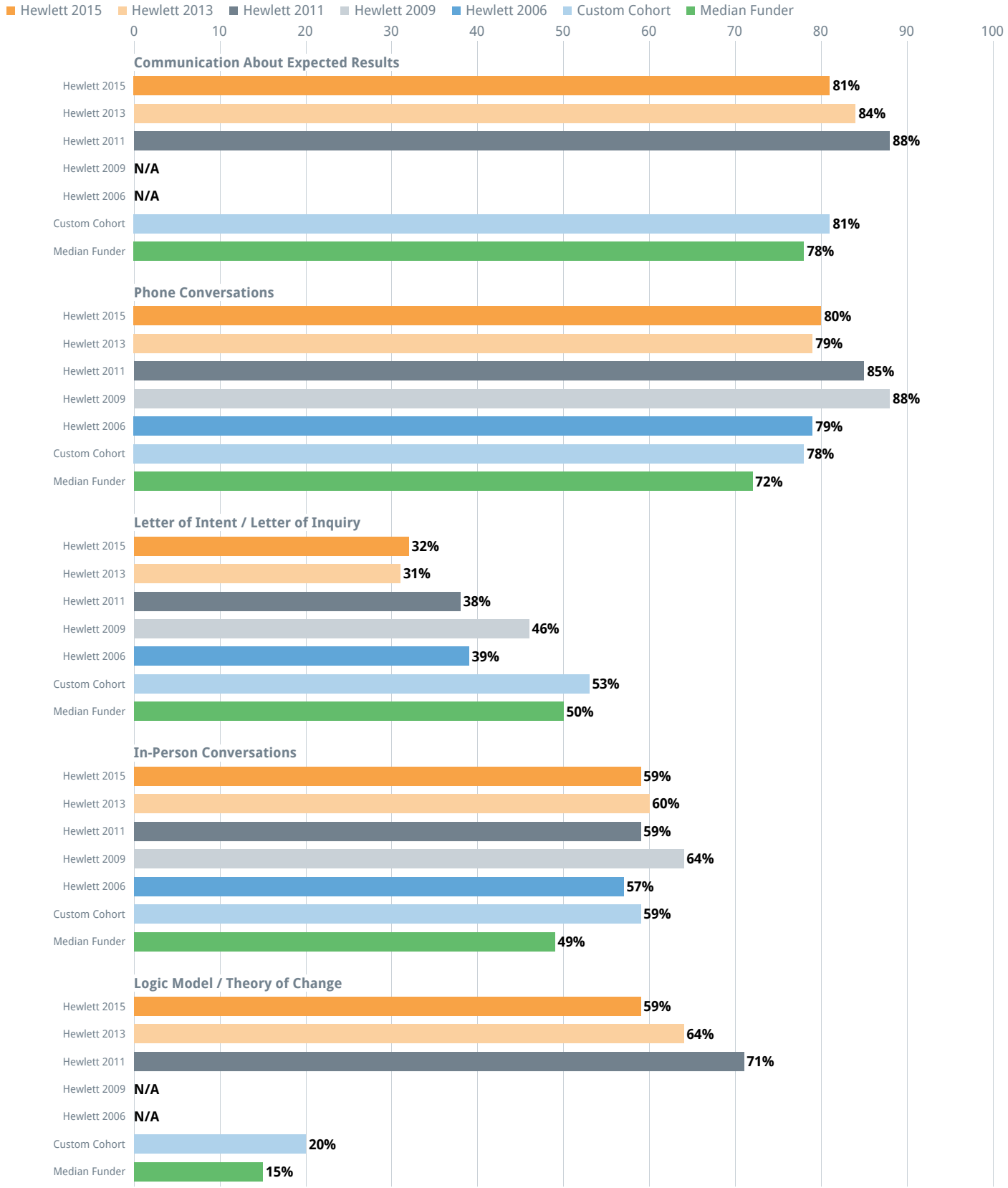
"HOW MUCH TIME ELAPSED FROM THE SUBMISSION OF THE GRANT PROPOSAL TO CLEAR COMMITMENT OF FUNDING?"

Time Elapsed from Submission of Proposal to Clear Commitment of Funding (Overall)	Hewlett 2015	Hewlett 2013	Hewlett 2011	Hewlett 2009	Hewlett 2006	Hewlett 2003	Average Funder	Custom Cohort
Less than 1 month	6%	8%	5%	5%	5%	8%	6%	5%
1 - 3 months	64%	62%	50%	47%	53%	58%	55%	48%
4 - 6 months	24%	26%	39%	41%	37%	31%	30%	32%
7 - 9 months	3%	2%	4%	5%	3%	2%	5%	8%
10 - 12 months	1%	1%	2%	2%	2%	0%	2%	4%
More than 12 months	1%	0%	1%	1%	0%	1%	2%	3%

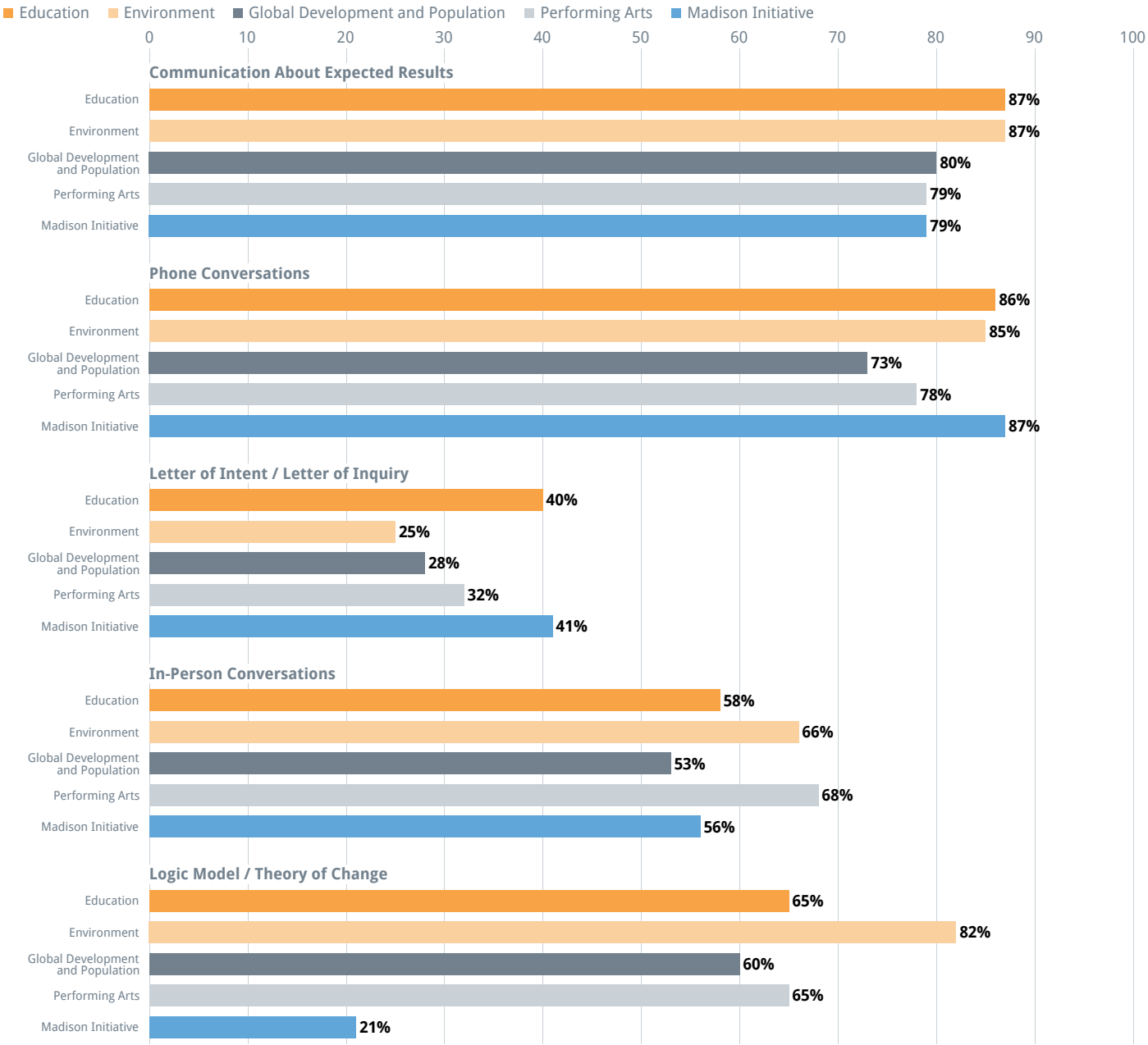
Time Elapsed from Submission of Proposal to Clear Commitment of Funding (By Subgroup)	Education	Environment	Global Development and Population	Performing Arts	Madison Initiative
Less than 1 month	3%	9%	4%	2%	16%
1 - 3 months	66%	68%	74%	48%	62%
4 - 6 months	19%	20%	16%	46%	16%
7 - 9 months	5%	2%	3%	3%	5%
10 - 12 months	5%	1%	1%	1%	0%
More than 12 months	2%	1%	1%	0%	0%

"WHICH SELECTION/PROPOSAL PROCESS ACTIVITIES WERE A PART OF YOUR PROCESS?"

> **Selection Process Activities**

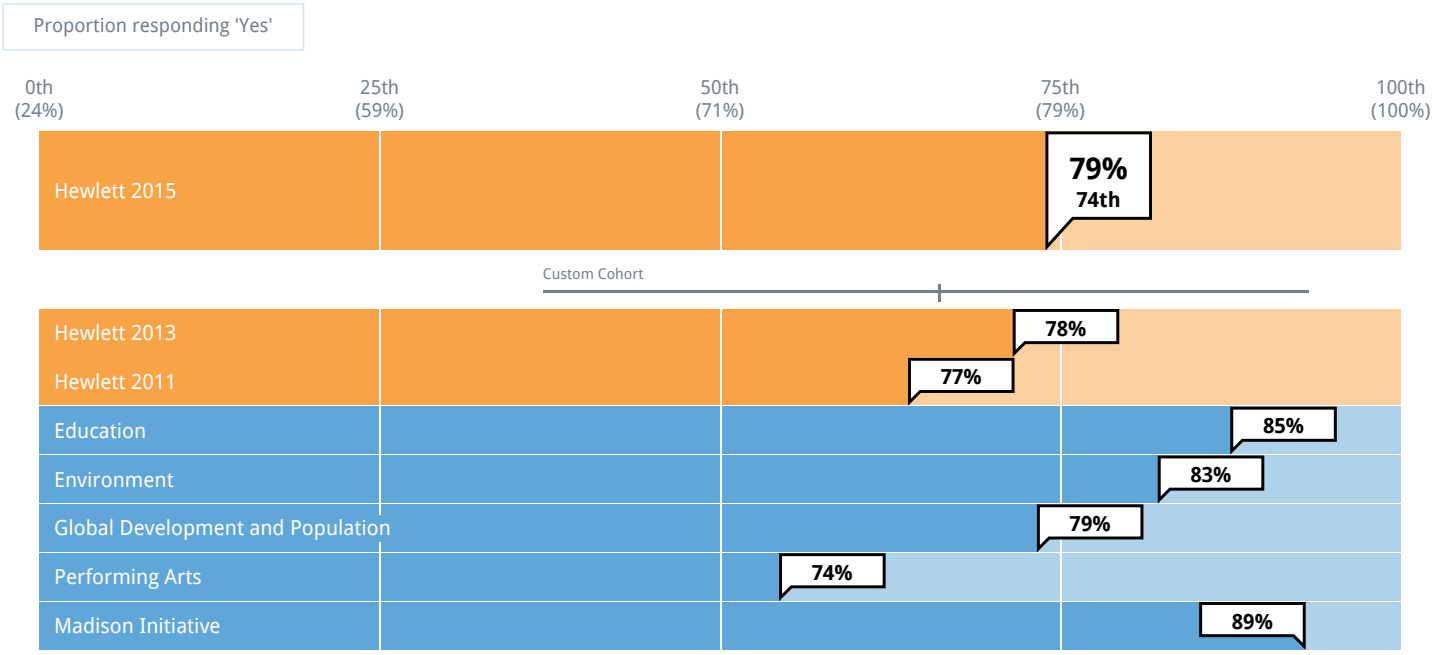

Hewlett 2015
Hewlett 2013
Hewlett 2011
Hewlett 2009
Hewlett 2006
Custom Cohort
Median Funder
0
10
20
30
40
50
60
70
80
90
100
Communication About Expected Results
Hewlett 2015 81%
Hewlett 2013 84%
Hewlett 2011 88%
Hewlett 2009 N/A
Hewlett 2006 N/A
Custom Cohort 81%
Median Funder 78%
Phone Conversations
Hewlett 2015 80%
Hewlett 2013 79%
Hewlett 2011 85%
Hewlett 2009 88%
Hewlett 2006 79%
Custom Cohort 78%
Median Funder 72%
Letter of Intent / Letter of Inquiry
Hewlett 2015 32%
Hewlett 2013 31%
Hewlett 2011 38%
Hewlett 2009 46%
Hewlett 2006 39%
Custom Cohort 53%
Median Funder 50%
In-Person Conversations
Hewlett 2015 59%
Hewlett 2013 60%
Hewlett 2011 59%
Hewlett 2009 64%
Hewlett 2006 57%
Custom Cohort 59%
Median Funder 49%
Logic Model / Theory of Change
Hewlett 2015 59%
Hewlett 2013 64%
Hewlett 2011 71%
Hewlett 2009 N/A
Hewlett 2006 N/A
Custom Cohort 20%
Median Funder 15%

Selection Process Activities - By Subgroup



Reporting and Evaluation Process

"At any point during the application or the grant period, did the Foundation and your organization exchange ideas regarding how your organization would assess the results of the work funded by this grant?"



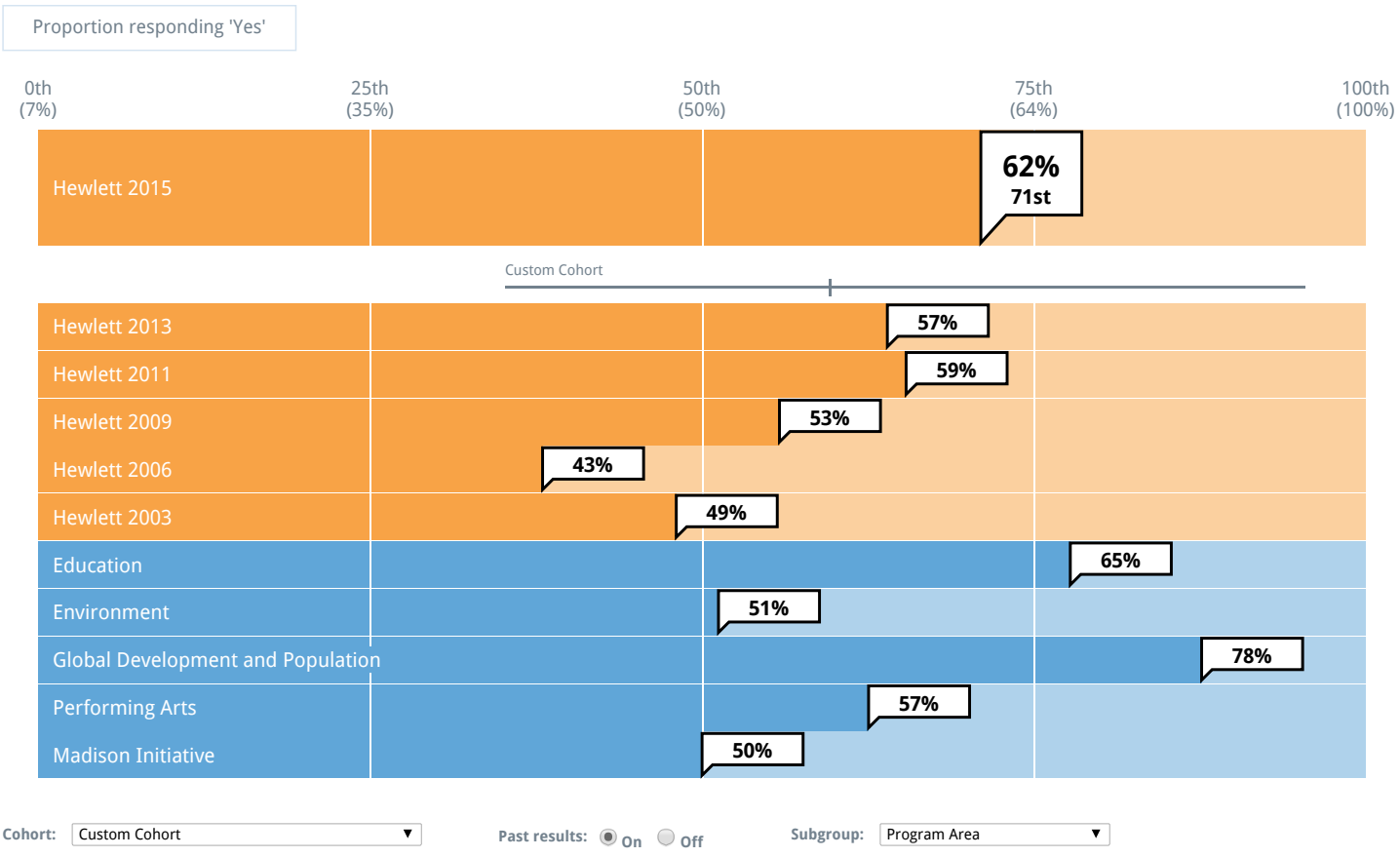
Cohort: Custom Cohort ▼ Past results: On Off Subgroup: Program Area ▼

Participation in Reporting and/or Evaluation Processes (Overall)	Hewlett 2015	Hewlett 2013	Hewlett 2011	Hewlett 2009	Hewlett 2006	Average Funder	Custom Cohort
Participated in a reporting and/or evaluation process	62%	61%	68%	54%	64%	57%	61%
There will be a report/evaluation but it has not occurred yet	34%	35%	30%	40%	32%	34%	35%
There was/will be no report/evaluation	2%	2%	1%	2%	2%	5%	3%
Don't know	2%	1%	1%	4%	1%	4%	2%

Involved External Evaluator in Reporting/Evaluation Process (Overall)	Hewlett 2015	Hewlett 2013	Hewlett 2011	Average Funder	Custom Cohort
Yes	13%	15%	20%	20%	29%
No	87%	85%	80%	80%	71%

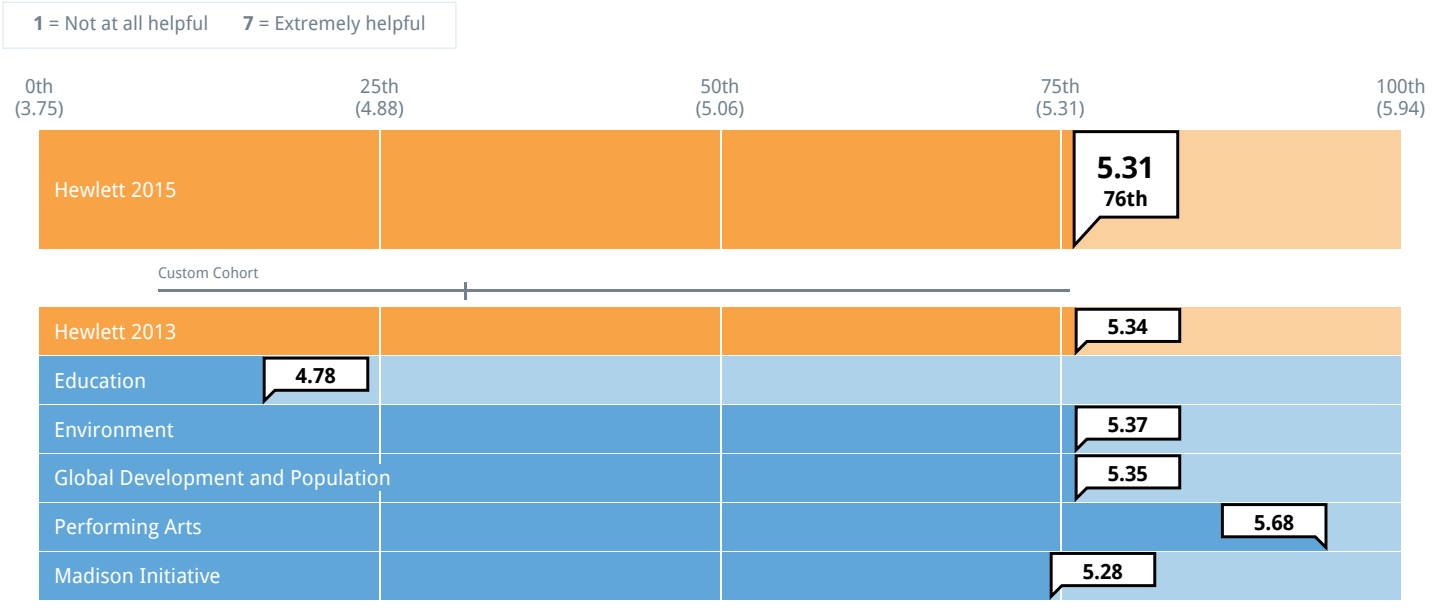
Involved External Evaluator in Reporting/Evaluation Process (By Subgroup)	Education	Environment	Global Development and Population	Performing Arts	Madison Initiative
Yes	24%	15%	17%	4%	0%
No	76%	85%	83%	96%	100%

"After submission of your report/evaluation, did the Foundation or the evaluator discuss it with you?"



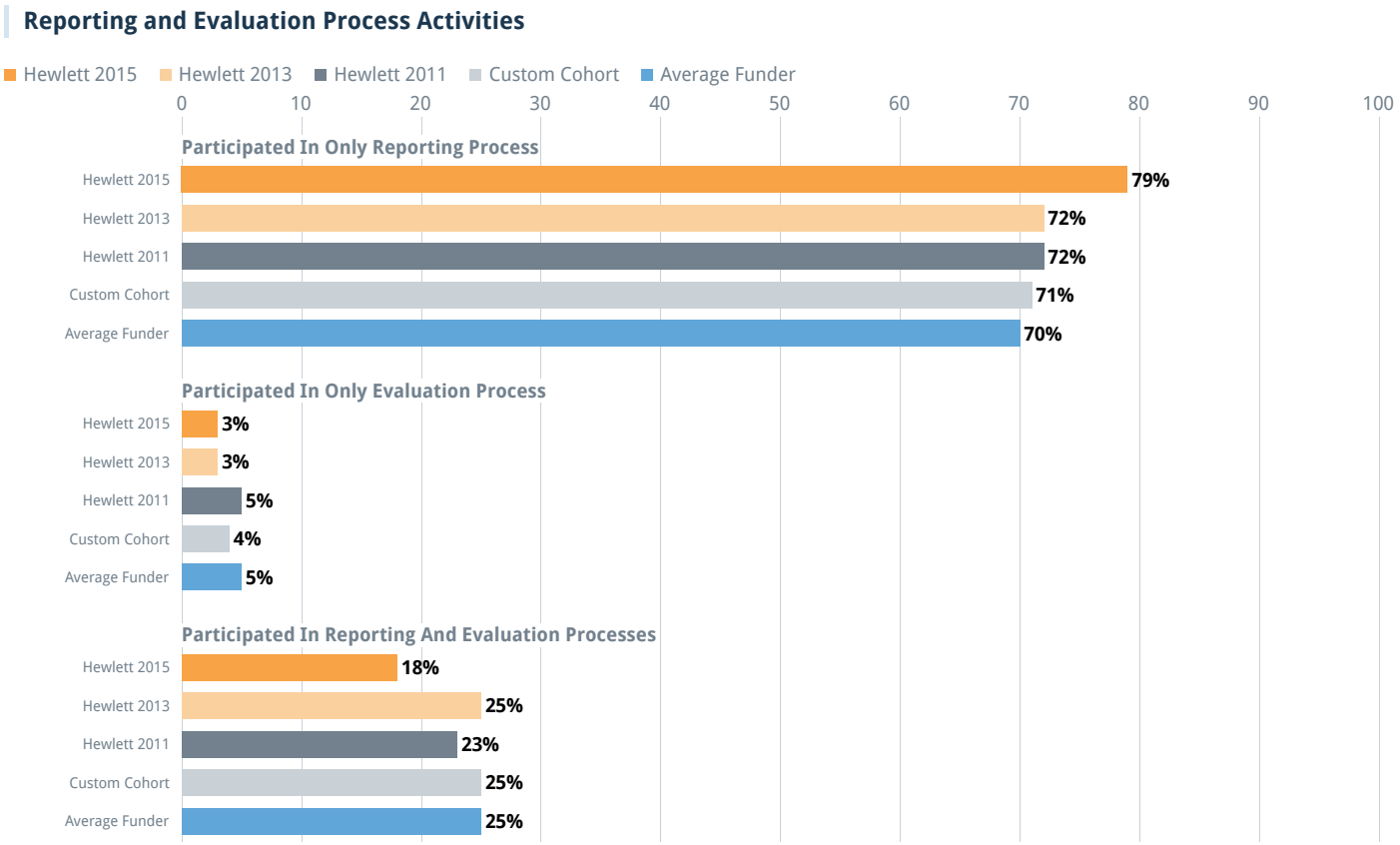
Cohort: Custom Cohort ▼ Past results: On Off Subgroup: Program Area ▼

"How helpful has the Foundation been to your organization's ability to assess progress towards your organization's goals?"

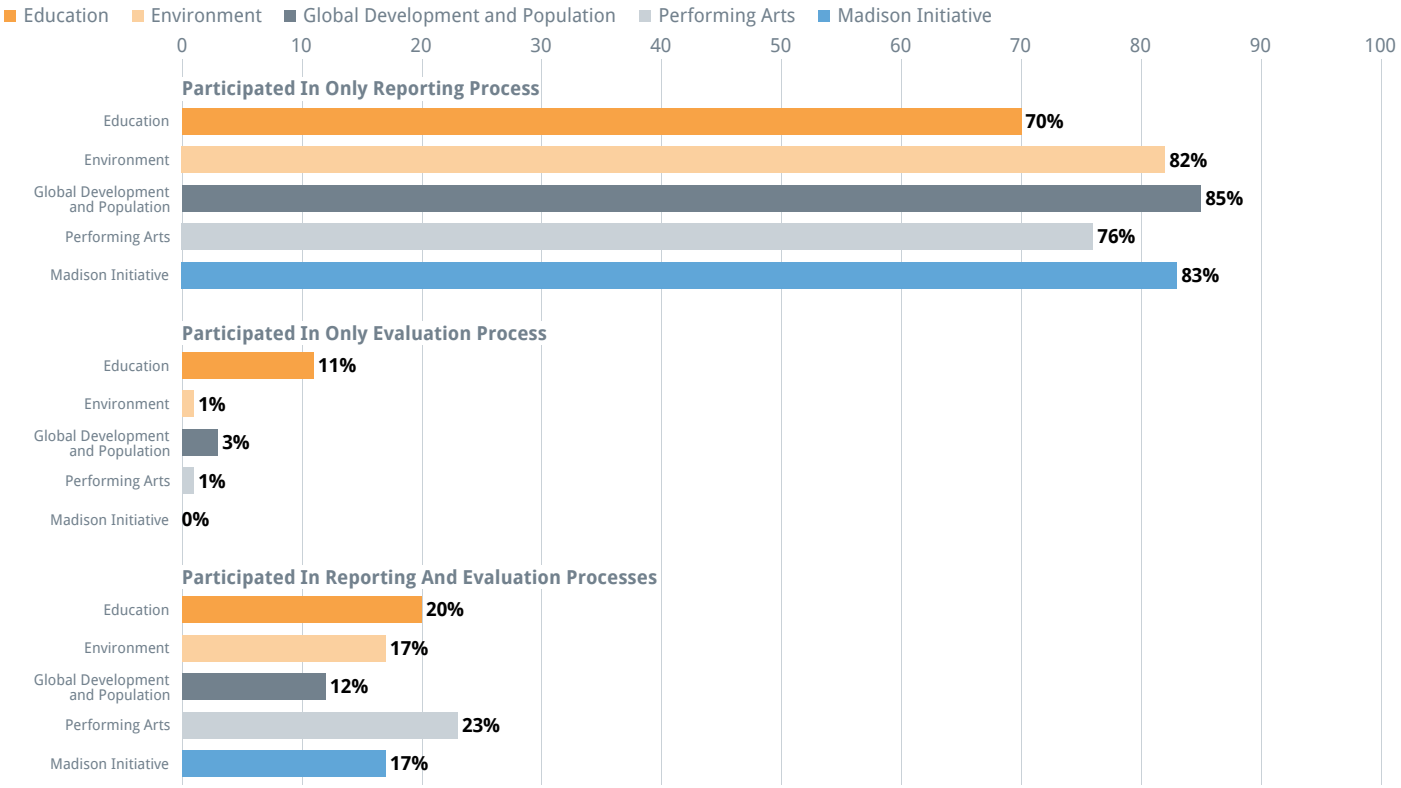


Cohort: Custom Cohort ▼ Past results: On Off Subgroup: Program Area ▼

"WHICH REPORTING/EVALUATION PROCESS ACTIVITIES WERE A PART OF YOUR PROCESS?"



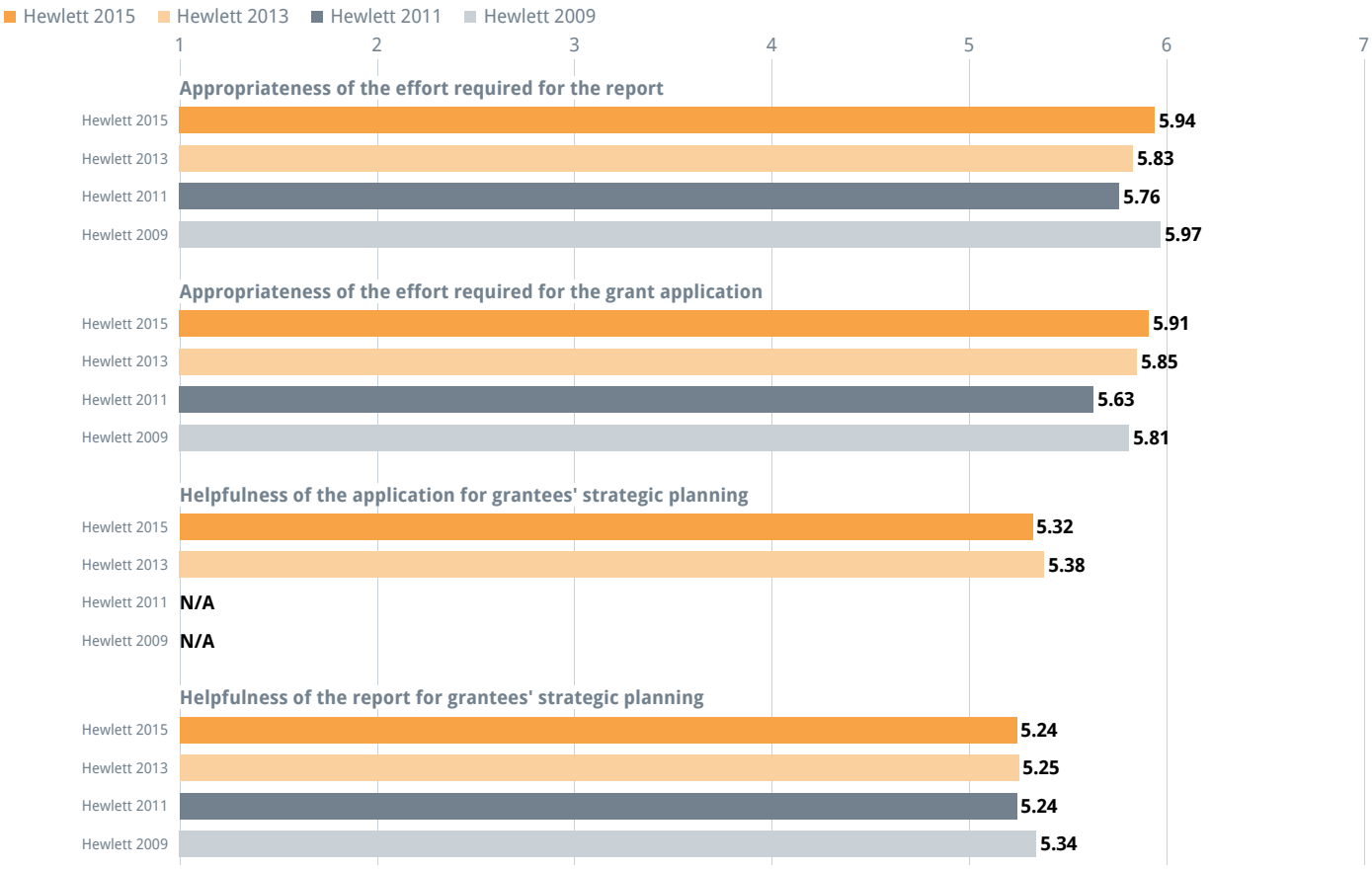
Reporting and Evaluation Process Activities - By Subgroup



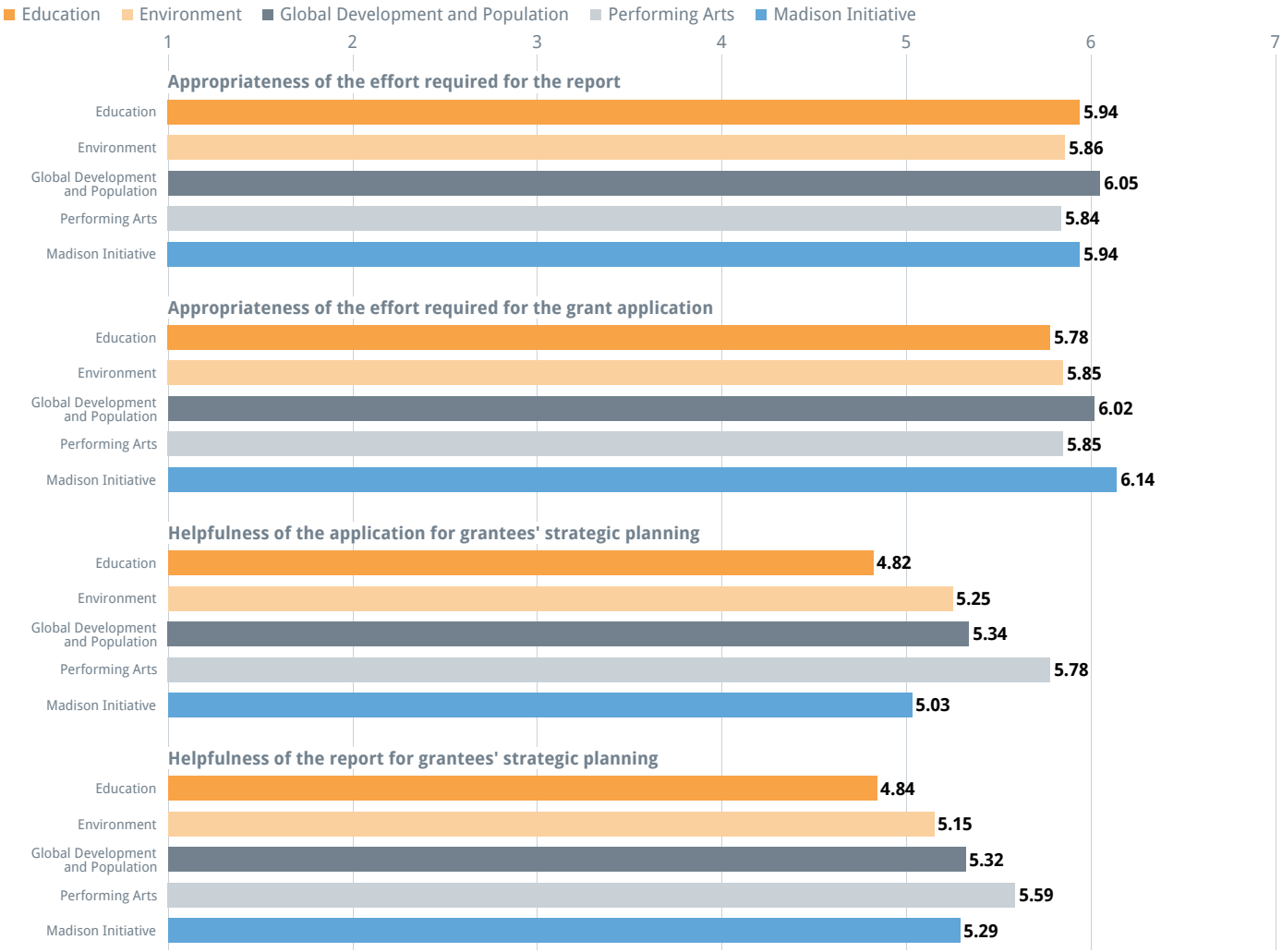
Additional Questions Related to Grant Processes

"Please rate the level of agreement with each of the following statements regarding your experience with Hewlett's application and reporting requirements."
(1 = Strongly disagree, 4 = Neither agree nor disagree, 7 = Strongly agree)

Experience with Hewlett's Application and Reporting Requirements - Overall

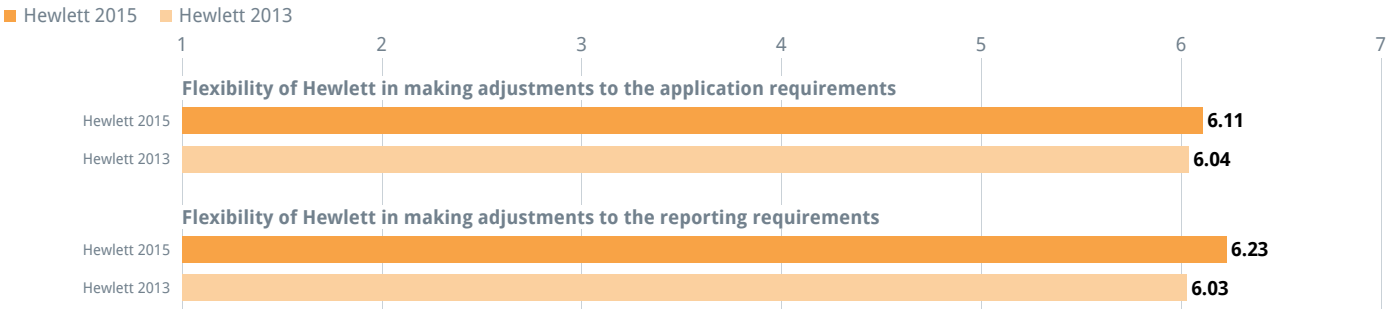


Experience with Hewlett's Application and Reporting Requirements - By Subgroup

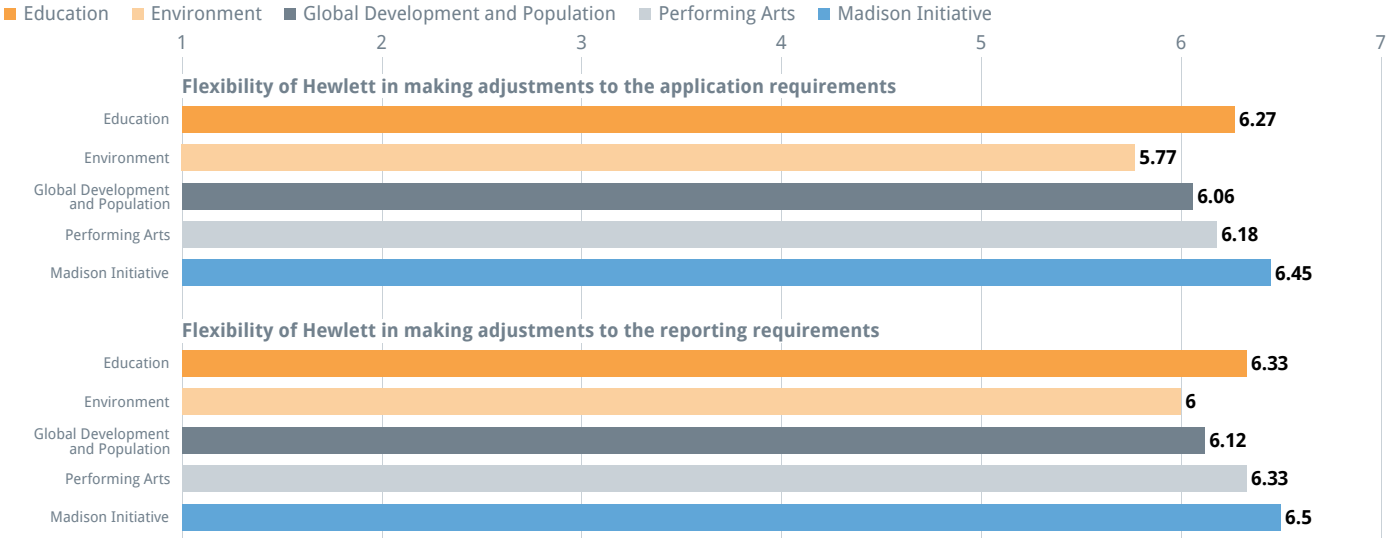


"If you had to ask for a change in application/reporting requirements or content, how flexible was Hewlett with making adjustments to fit your circumstances?"
(1 = Not at all flexible, 7 = Extremely flexible)

Hewlett's Flexibility with Needed Adjustments to Fit Circumstances - Overall

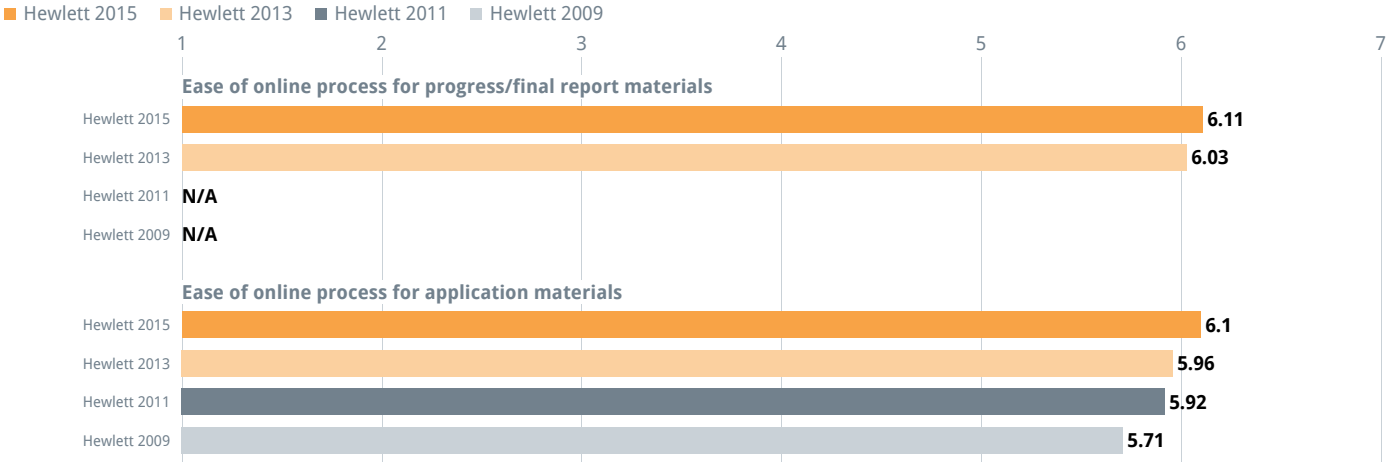


Hewlett's Flexibility with Needed Adjustments to Fit Circumstances - By Subgroup

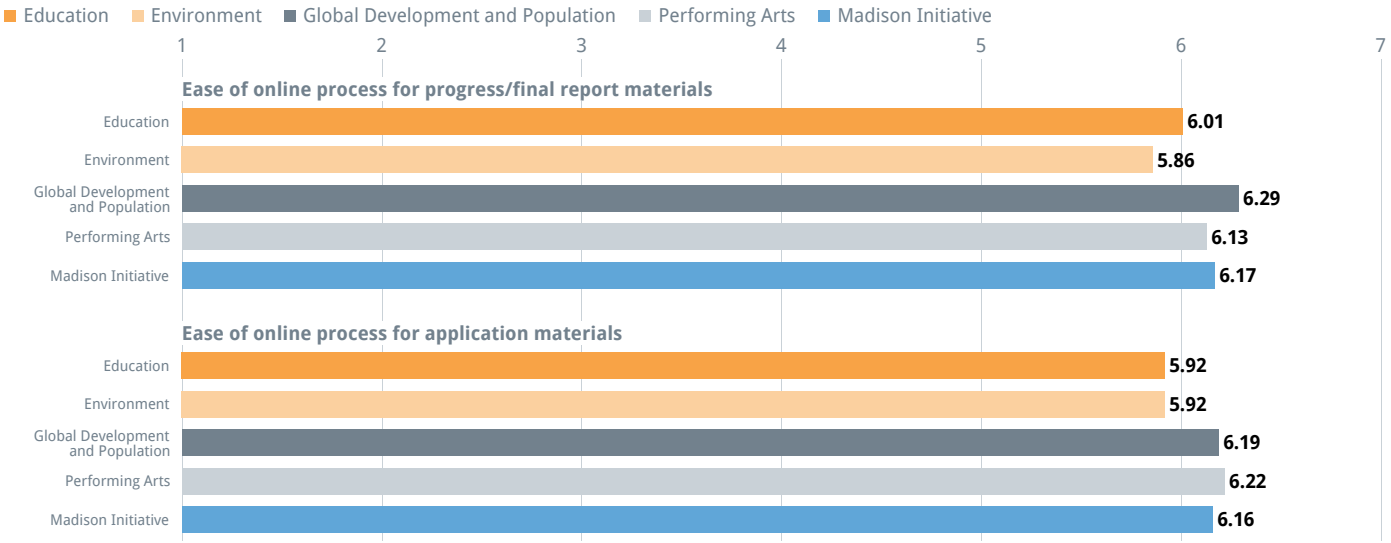


"If you submitted your application/progress or final report to Hewlett through the Web, how easy was the online process to use?"
(1 = Very difficult to use, 7 = Extremely easy to use)

Online Process Ease of Use - Overall



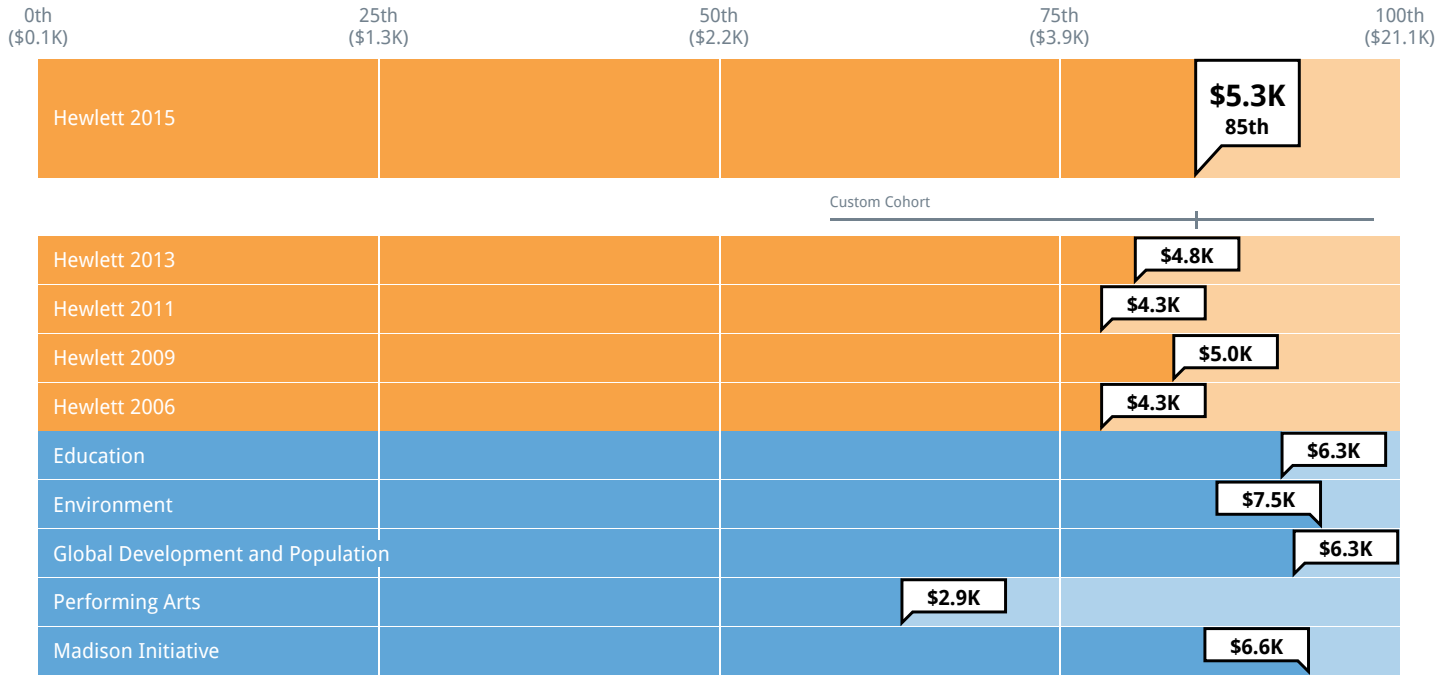
Online Process Ease of Use - By Subgroup



DOLLAR RETURN AND TIME SPENT ON PROCESSES

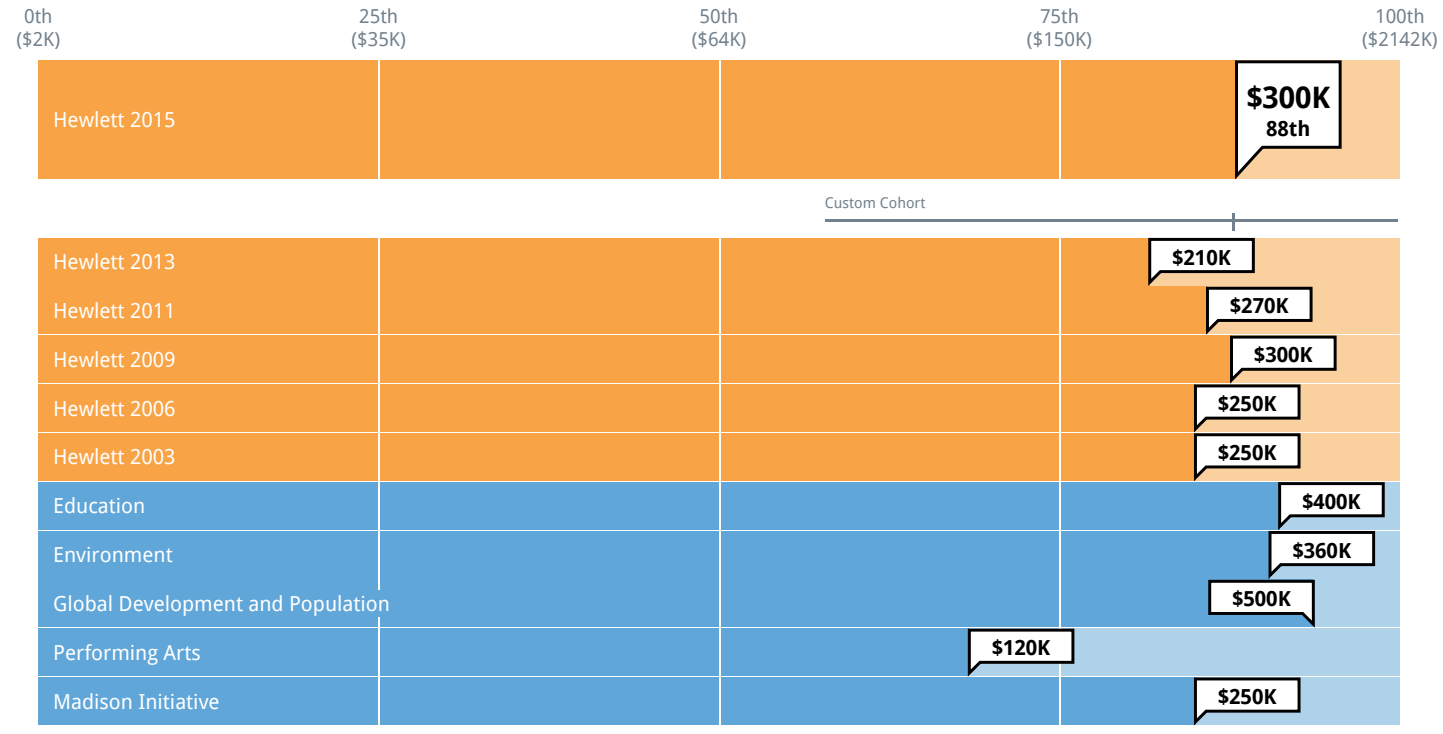
Dollar Return: Median grant dollars awarded per process hour required

Includes total grant dollars awarded and total time necessary to fulfill the requirements over the lifetime of the grant



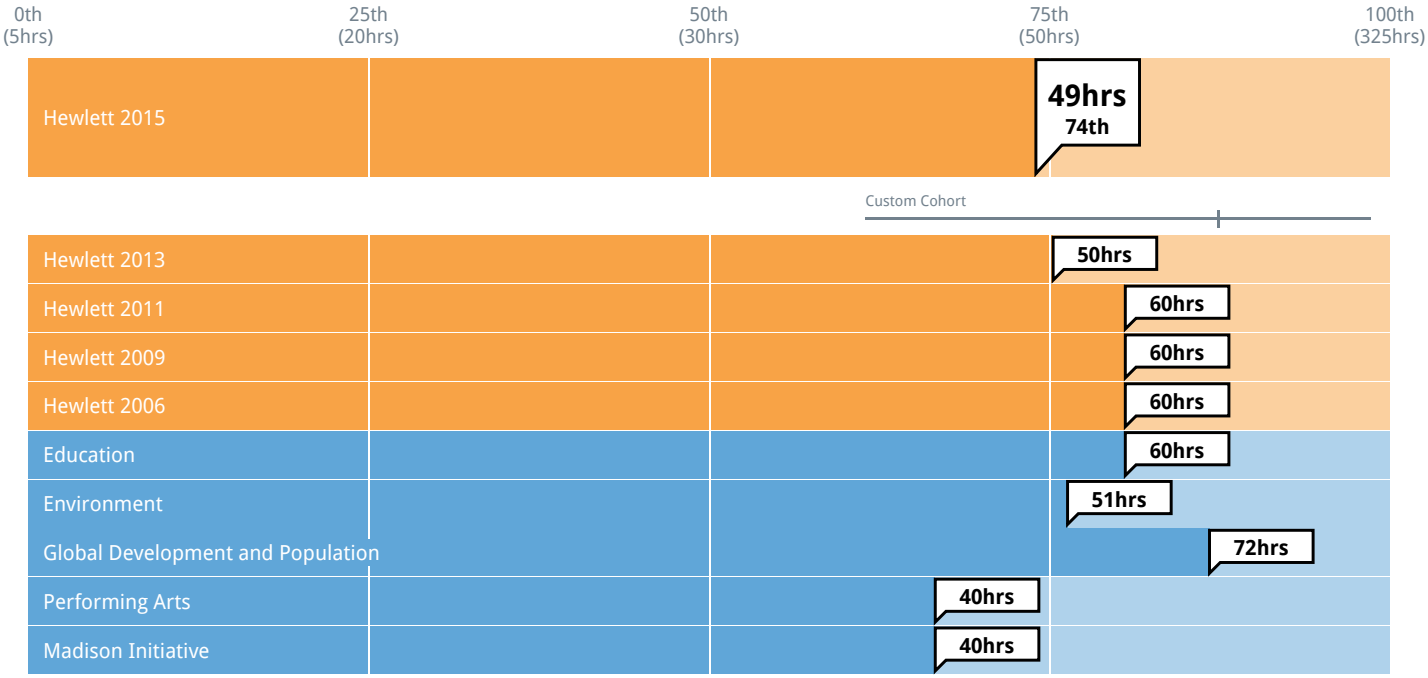
Cohort: Custom Cohort ▼ Past results: On Off Subgroup: Program Area ▼

Median Grant Size



Cohort: Custom Cohort ▼ Past results: On Off Subgroup: Program Area ▼

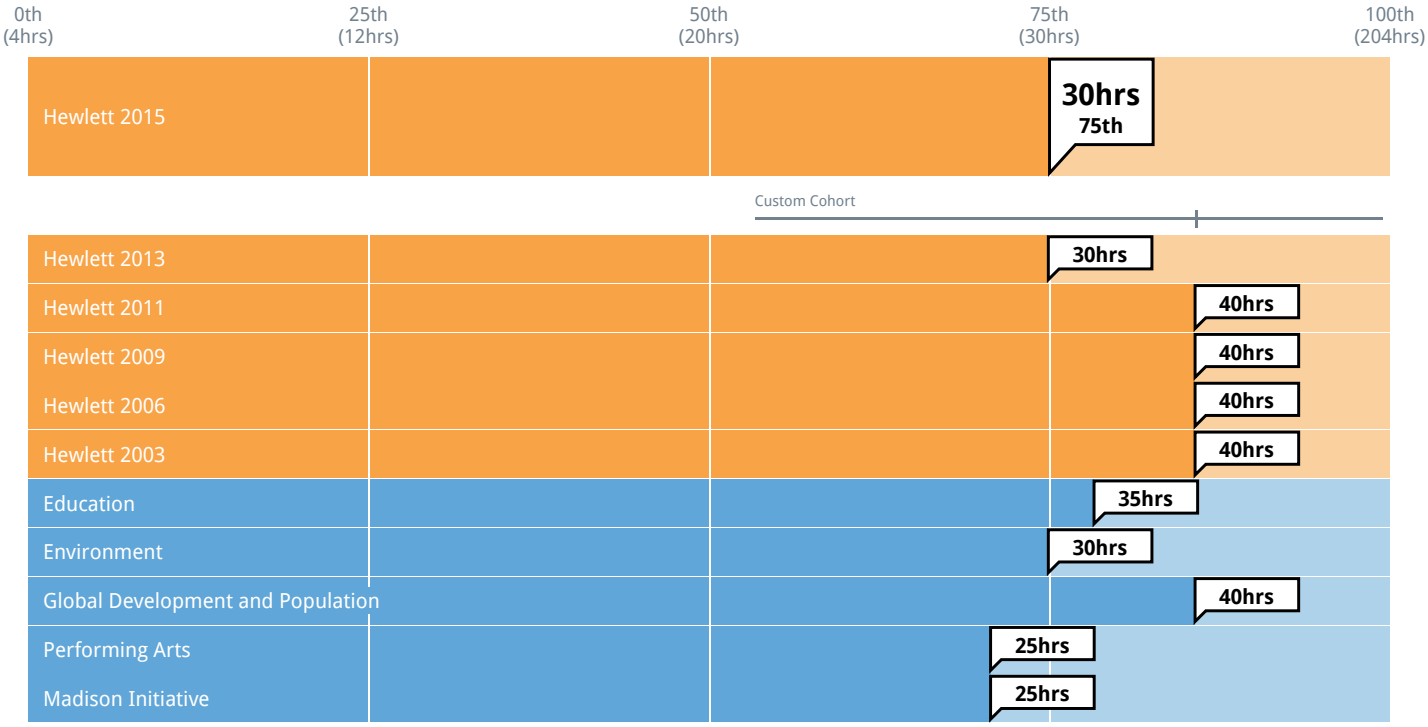
Median hours spent by grantees on funder requirements over grant lifetime



Cohort: Custom Cohort ▼ Past results: On Off Subgroup: Program Area ▼

Time Spent on Selection Process

Median Hours Spent on Proposal and Selection Process



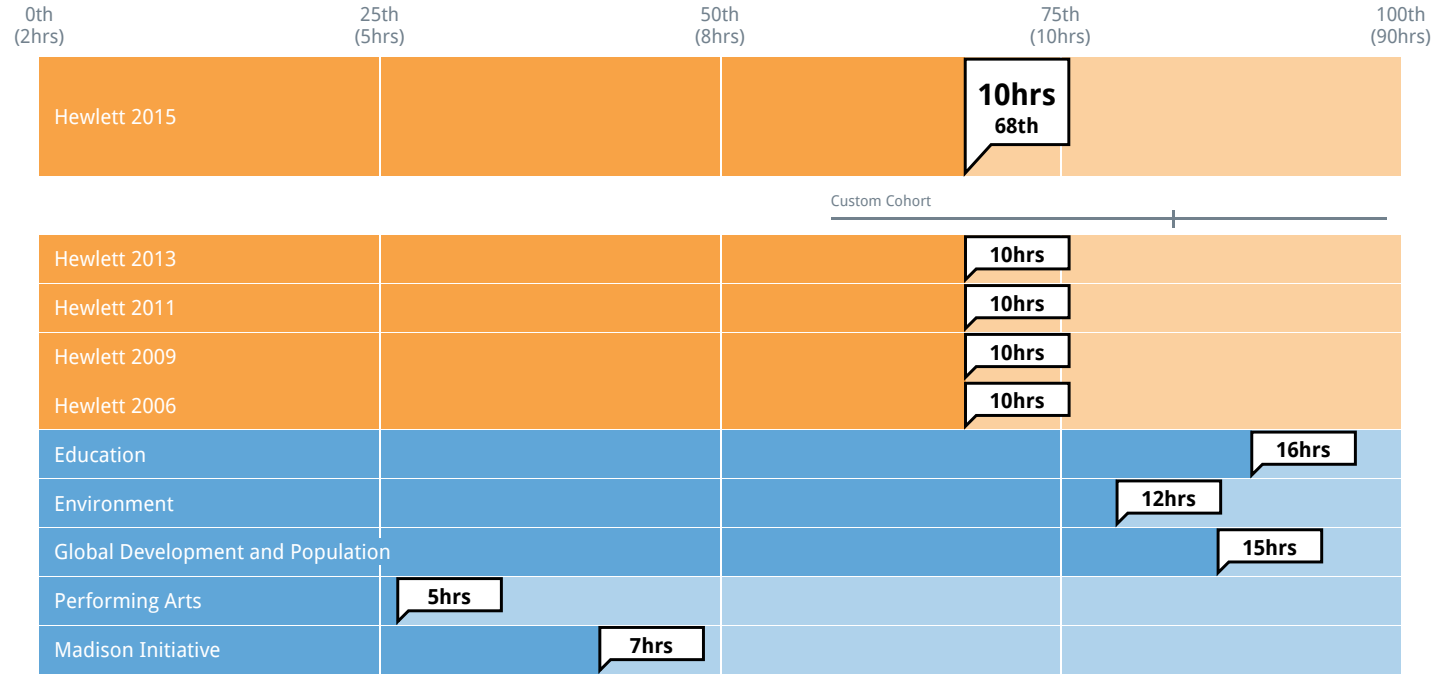
Cohort: Custom Cohort ▼ Past results: On Off Subgroup: Program Area ▼

Time Spent On Proposal And Selection Process (Overall)	Hewlett 2015	Hewlett 2013	Hewlett 2011	Hewlett 2009	Hewlett 2006	Hewlett 2003	Average Funder	Custom Cohort
1 to 9 hours	9%	8%	6%	7%	5%	5%	23%	7%
10 to 19 hours	19%	17%	13%	13%	12%	14%	22%	11%
20 to 29 hours	18%	21%	17%	17%	15%	17%	17%	15%
30 to 39 hours	10%	11%	10%	12%	12%	8%	8%	8%
40 to 49 hours	18%	15%	18%	18%	21%	20%	11%	17%
50 to 99 hours	15%	19%	22%	19%	22%	22%	10%	18%
100 to 199 hours	8%	7%	9%	11%	10%	10%	6%	15%
200+ hours	4%	3%	5%	3%	3%	4%	3%	9%

Time Spent On Proposal And Selection Process (By Subgroup)	Education	Environment	Global Development and Population	Performing Arts	Madison Initiative
1 to 9 hours	9%	9%	5%	6%	11%
10 to 19 hours	19%	19%	11%	21%	26%
20 to 29 hours	12%	18%	13%	29%	14%
30 to 39 hours	10%	11%	10%	10%	11%
40 to 49 hours	22%	15%	21%	17%	17%
50 to 99 hours	16%	17%	20%	11%	9%
100 to 199 hours	9%	7%	12%	6%	11%
200+ hours	2%	4%	7%	1%	0%

Time Spent on Reporting and Evaluation Process

Median Hours Spent on Monitoring, Reporting and Evaluation Process Per Year



Cohort: Custom Cohort ▼ Past results: On Off Subgroup: Program Area ▼

Time Spent On Monitoring, Reporting, And Evaluation Process (Annualized) (Overall)	Hewlett 2015	Hewlett 2013	Hewlett 2011	Hewlett 2009	Hewlett 2006	Average Funder	Custom Cohort
1 to 9 hours	46%	44%	43%	43%	49%	55%	36%
10 to 19 hours	21%	25%	25%	27%	22%	19%	23%
20 to 29 hours	14%	14%	13%	13%	10%	10%	15%
30 to 39 hours	4%	4%	5%	5%	6%	4%	5%
40 to 49 hours	6%	4%	5%	4%	6%	3%	6%
50 to 99 hours	5%	6%	6%	5%	4%	5%	8%
100+ hours	4%	2%	3%	3%	4%	4%	7%

Time Spent On Monitoring, Reporting, And Evaluation Process (Annualized) (By Subgroup)	Education	Environment	Global Development and Population	Performing Arts	Madison Initiative
1 to 9 hours	32%	37%	30%	71%	63%
10 to 19 hours	22%	23%	26%	17%	15%
20 to 29 hours	22%	16%	18%	6%	4%
30 to 39 hours	6%	4%	7%	1%	0%
40 to 49 hours	6%	5%	7%	3%	7%
50 to 99 hours	5%	11%	7%	1%	7%
100+ hours	6%	3%	5%	2%	4%

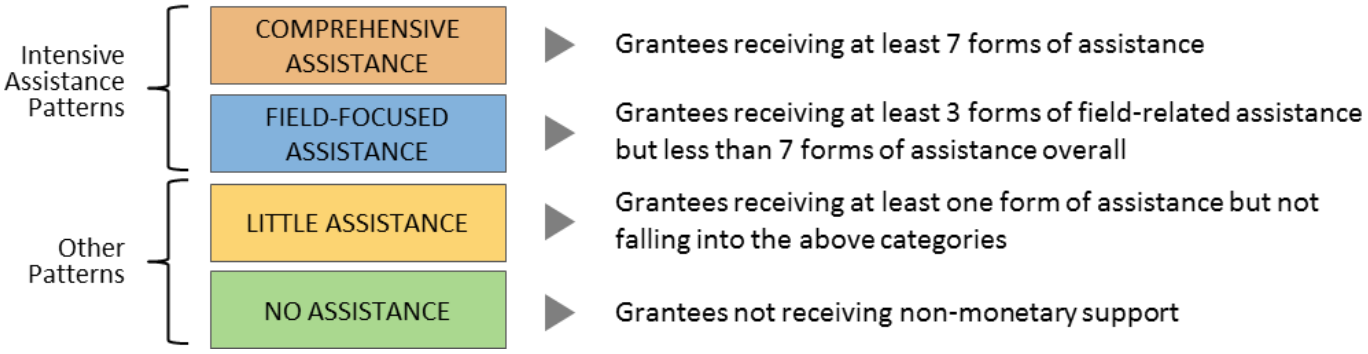
NON-MONETARY ASSISTANCE

Non-Monetary Assistance Patterns

Grantees were asked to indicate whether they had received any of the following fourteen types of assistance provided directly or paid for by the Foundation.

Management Assistance	Field-Related Assistance	Other Assistance
General management advice	Encouraged/facilitated collaboration	Board development/governance assistance
Strategic planning advice	Insight and advice on your field	Information technology assistance
Financial planning/accounting	Introductions to leaders in field	Communications/marketing/publicity assistance
Development of performance measures	Provided research or best practices	Use of Foundation facilities
	Provided seminars/forums/convenings	Staff/management training

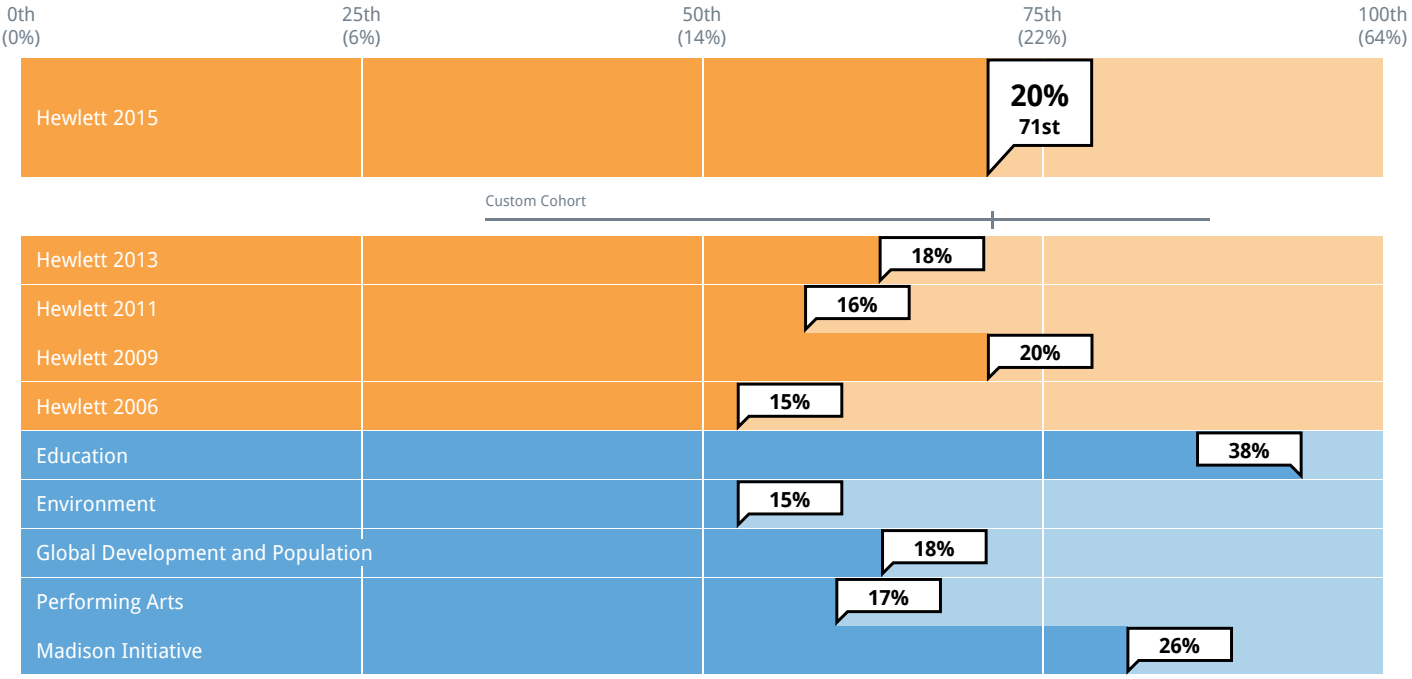
Based on their responses, CEP categorized grantees by the pattern of assistance they received. CEP's analysis shows that providing three or fewer assistance activities is often ineffective; it is only when grantees receive one of the two intensive patterns of assistance described below that they have a substantially more positive experience compared to grantees receiving no assistance.



Non-Monetary Assistance Patterns (Overall)	Hewlett 2015	Hewlett 2013	Hewlett 2011	Hewlett 2009	Hewlett 2006	Average Funder	Custom Cohort
Comprehensive	5%	6%	5%	4%	3%	6%	6%
Field-focused	15%	12%	12%	16%	12%	9%	15%
Little	44%	44%	46%	39%	41%	37%	41%
None	36%	37%	37%	41%	44%	47%	38%

Non-Monetary Assistance Patterns (By Subgroup)	Education	Environment	Global Development and Population	Performing Arts	Madison Initiative
Comprehensive	5%	7%	5%	6%	3%
Field-focused	34%	8%	13%	11%	23%
Little	36%	48%	49%	48%	33%
None	26%	37%	33%	35%	41%

Proportion of grantees that received field-focused or comprehensive assistance



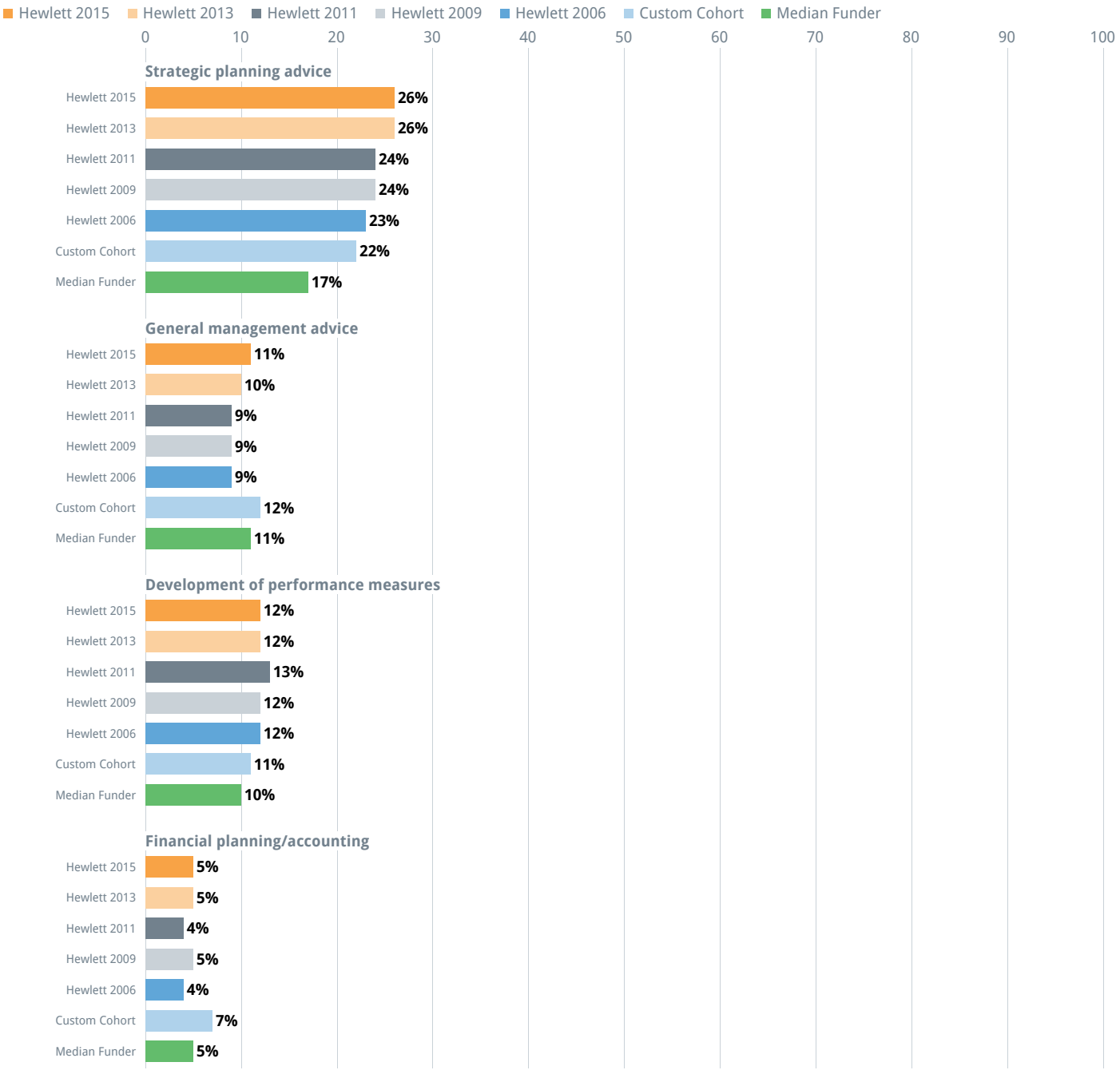
Cohort: Custom Cohort ▼ Past results: On Off Subgroup: Program Area ▼

Behind the numbers: Hewlett grantees who receive field or comprehensive assistance rate the Foundation significantly more positively than grantees who receive little or no assistance for Hewlett's impact on grantees' fields and organizations, transparency, and the overall funder-grantee relationship.

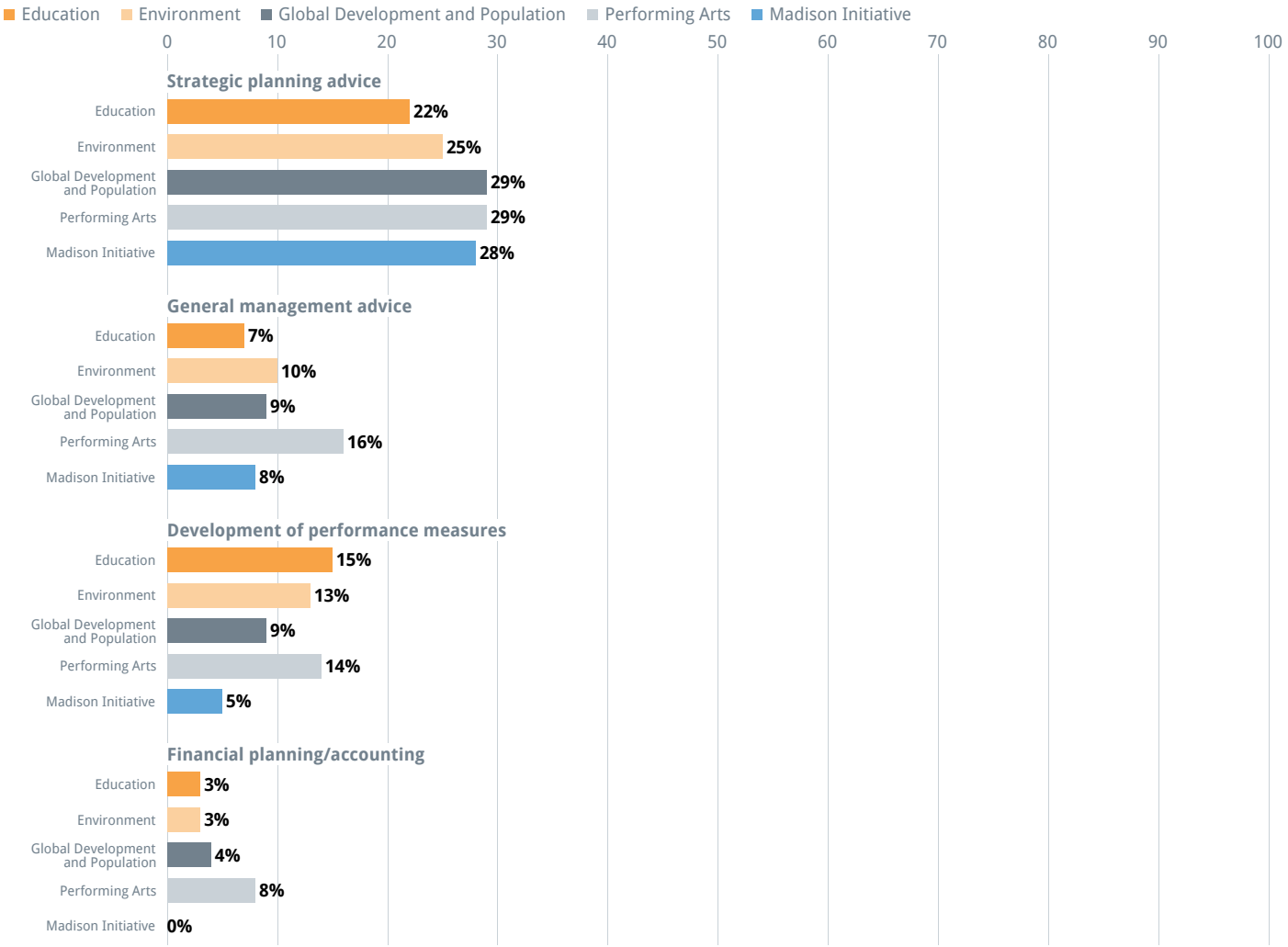
Management Assistance Activities

"Please indicate all types of non-monetary assistance, if any, you received (from staff or a third party paid for by the Foundation) associated with this funding."

Percentage of Grantees that Received Management Assistance



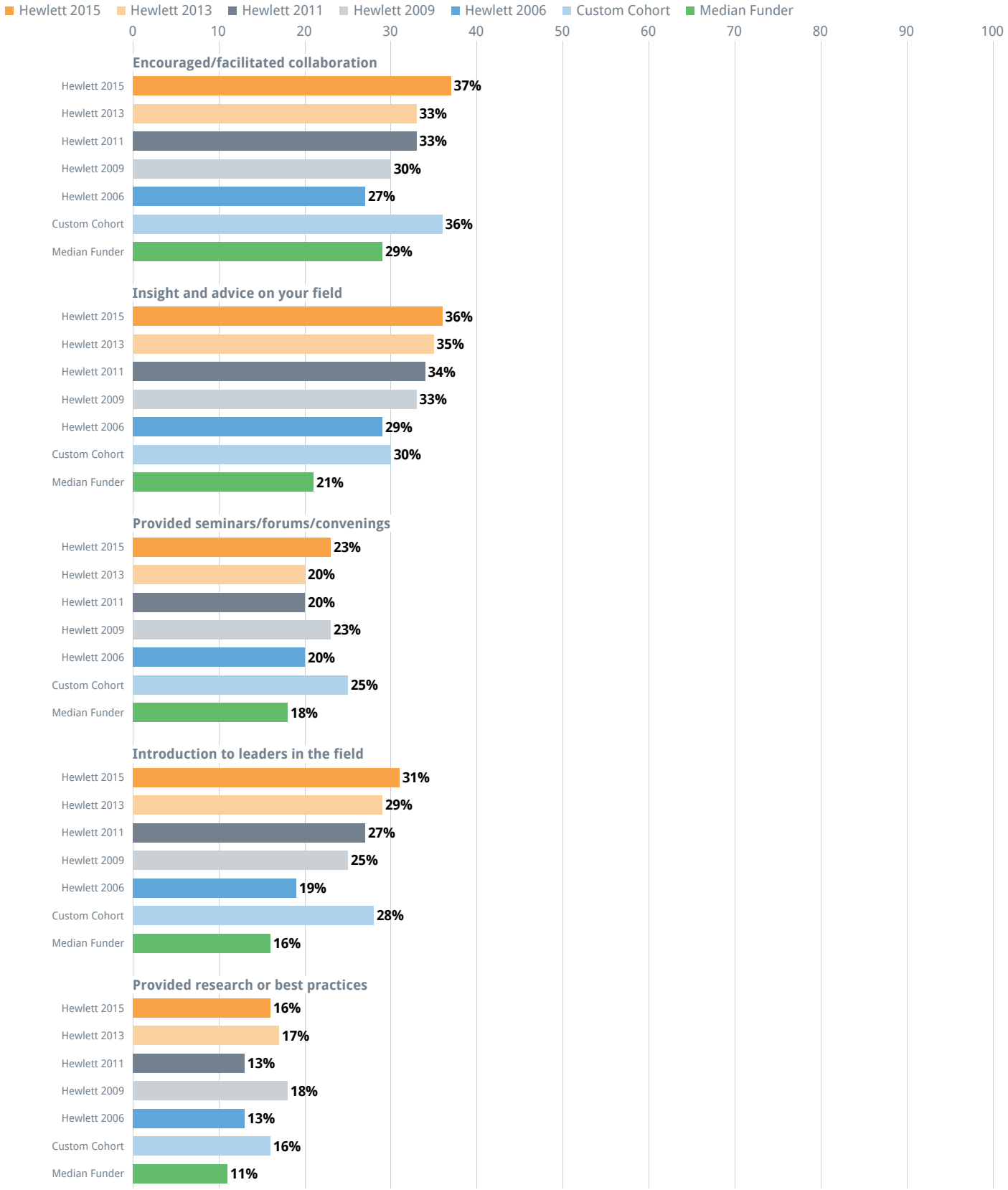
Percentage of Grantees that Received Management Assistance - By Subgroup



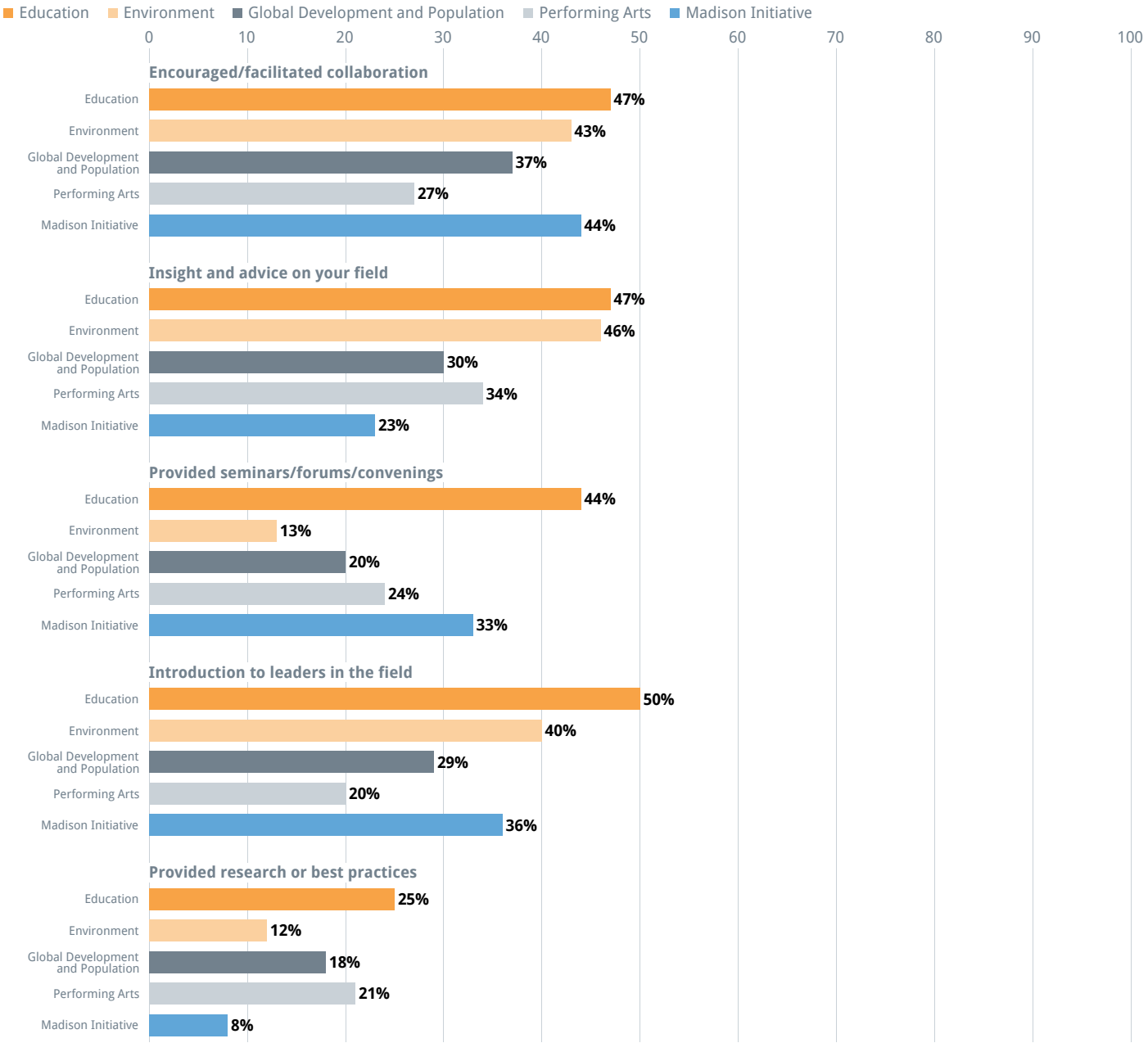
Field-Related Assistance Activities

"Please indicate all types of non-monetary assistance, if any, you received (from staff or a third party paid for by the Foundation) associated with this funding."

> **Percentage of Grantees that Received Field-Related Assistance**


Hewlett 2015
Hewlett 2013
Hewlett 2011
Hewlett 2009
Hewlett 2006
Custom Cohort
Median Funder
0
10
20
30
40
50
60
70
80
90
100
Encouraged/facilitated collaboration
Hewlett 2015 37%
Hewlett 2013 33%
Hewlett 2011 33%
Hewlett 2009 30%
Hewlett 2006 27%
Custom Cohort 36%
Median Funder 29%
Insight and advice on your field
Hewlett 2015 36%
Hewlett 2013 35%
Hewlett 2011 34%
Hewlett 2009 33%
Hewlett 2006 29%
Custom Cohort 30%
Median Funder 21%
Provided seminars/forums/convenings
Hewlett 2015 23%
Hewlett 2013 20%
Hewlett 2011 20%
Hewlett 2009 23%
Hewlett 2006 20%
Custom Cohort 25%
Median Funder 18%
Introduction to leaders in the field
Hewlett 2015 31%
Hewlett 2013 29%
Hewlett 2011 27%
Hewlett 2009 25%
Hewlett 2006 19%
Custom Cohort 28%
Median Funder 16%
Provided research or best practices
Hewlett 2015 16%
Hewlett 2013 17%
Hewlett 2011 13%
Hewlett 2009 18%
Hewlett 2006 13%
Custom Cohort 16%
Median Funder 11%

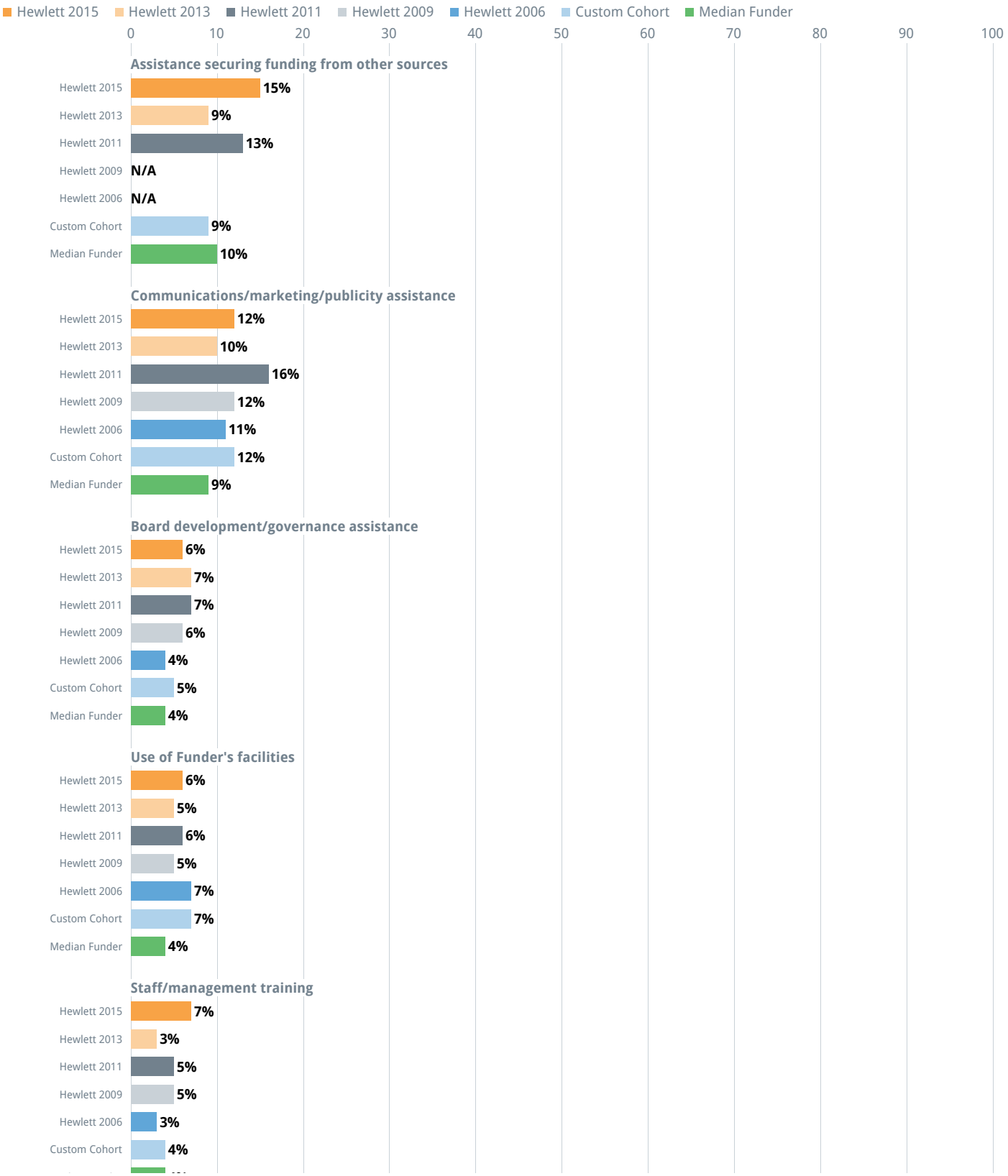
Percentage of Grantees that Received Field-Related Assistance - By Subgroup



Other Assistance Activities

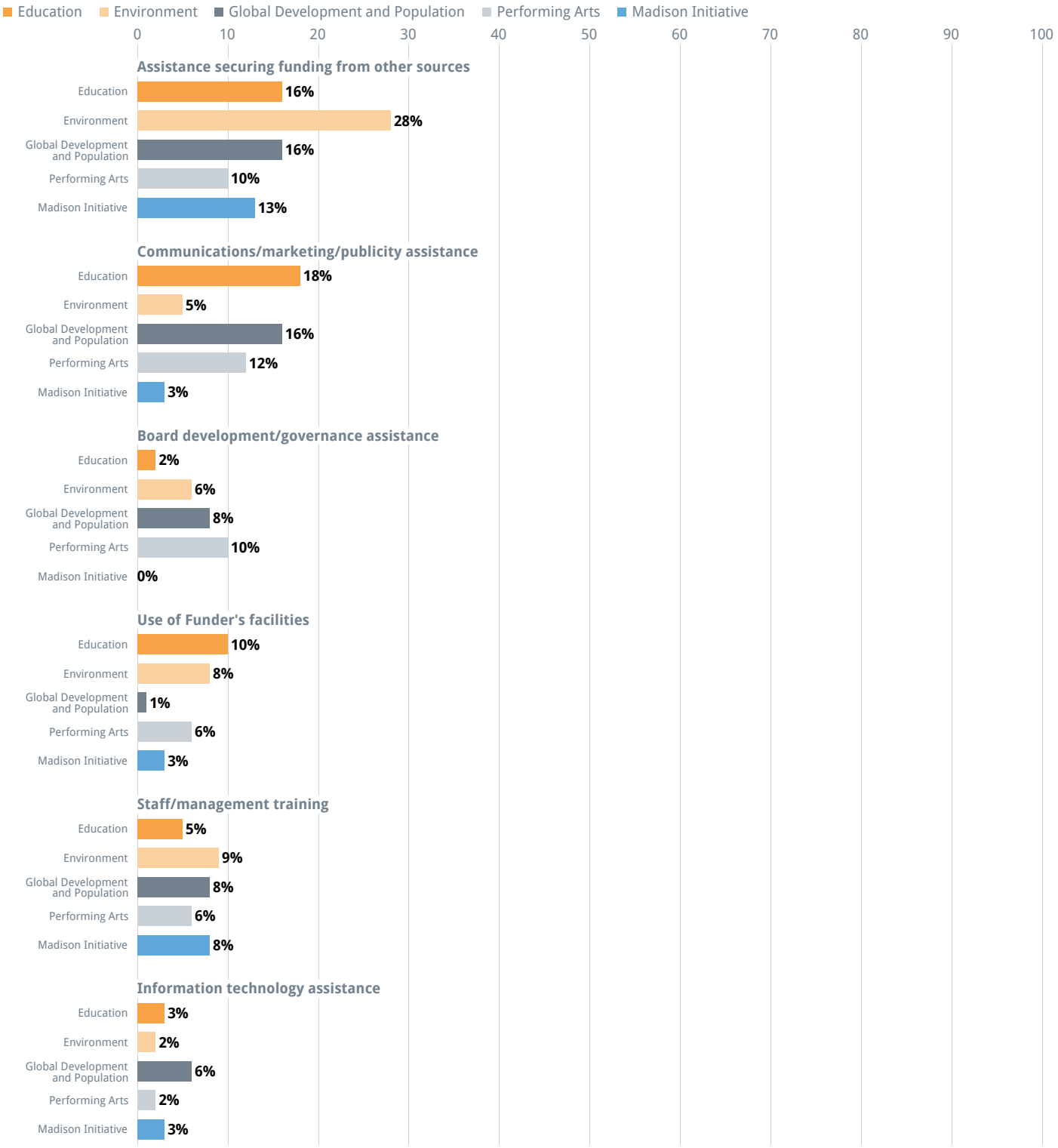
"Please indicate all types of non-monetary assistance, if any, you received (from staff or a third party paid for by the Foundation) associated with this funding."

Percentage of Grantees that Received Other Assistance



Median Funder
4%
Information technology assistance
Hewlett 2015
3%
Hewlett 2013
4%
Hewlett 2011
4%
Hewlett 2009
4%
Hewlett 2006
3%
Custom Cohort
4%
Median Funder
3%

Percentage of Grantees that Received Other Assistance - By Subgroup



GRANTEE SUGGESTIONS FOR THE FOUNDATION

Grantees were asked to provide any suggestions for how the Foundation could improve. These suggestions were then categorized by CEP and grouped into the topics below.

To download the full set of grantee comments and suggestions, please refer to the "Downloadable Materials" page. Please note that comments have been edited or deleted to protect the confidentiality of respondents.

PROPORTION OF GRANTEE SUGGESTIONS BY TOPIC

Topic of Grantee Suggestion	%
Quality and Quantity of Interactions	15%
Non-Monetary Assistance	15%
Proposal and Selection Process	12%
Grantmaking Characteristics	11%
Impact on and Understanding of Grantees' Fields	9%
Foundation Communications	7%
Impact on and Understanding of Grantees' Organizations	6%
Reporting/Evaluation Process	6%
Approach to Strategy Development	5%
Funding Topics and Communities	5%
Administrative Processes	1%
Other	10%

Selected Comments

Grantees were asked to provide any suggestions for how the Foundation could improve. These suggestions were then categorised by CEP and grouped into the topics below.

QUALITY AND QUANTITY OF INTERACTIONS (15%)

- **Increased Frequency of Interactions (N=23)**
  - "Ongoing involvement not just at renewal and evaluation times."
  - "It would be helpful to have more frequent check-ins with individual program officers to he/she can better understand the breadth of the grantees work and the grantee can better understand how its work fits into the overall goal of the Foundation."
  - "Would love to have more meetings with Hewlett to learn more about their interest in our field, and to have them partake in more of our work."
- **Site Visits (N=16)**
  - "I would like more site visits and attendance at performances."
  - "I would suggest our contact visit us at least twice per year to better understand our organization."
  - "Providing more opportunities for Hewlett staff to get out onto the landscape and experience the field work personally and for blocks of time that will be meaningful and allow a strong sense of what their funds are doing on the ground."
- **Responsiveness (N=6)**
  - "Staff at the Foundation are insanely busy. It can be hard, sometimes, to get their attention."
  - "More timely responses from our program officer would be helpful, especially when we are trying to organize events and need input re available dates for officers to attend."
- **Contact Changes (N=4)**
  - "Given the staff term limits, I would appreciate a successor planning and transition process paving the relationship between the grantee and the departing program officer with the newly assigned one."
  - "After our first Foundation officer left his position, it felt like there was a long gap before we were placed with our new officer. Since we were new grantees, we were initially unclear during this time who/how we could ask questions or report regarding updates. In the future, it would be ideal to have an 'interim' officer in place during long gaps."
- **Other (N=5)**

NON-MONETARY ASSISTANCE (15%)

- **Grantee Collaborations (N=17)**
  - "Facilitate collaboration among their grantees. Bring grantees together more to share ideas/learnings."
  - "More opportunities to share resources, best practice, challenges, and success with other grantee organizations."
  - "...One small suggestion would be to better connect the grantees with similar goals and missions and encourage partnerships among them."
- **Capacity Building (N=13)**
  - "...There are huge issues for performing arts regarding best ways to promote events, best ways to spend marketing dollars, co-presenting and partnering with other non-profits, for profit presenters and local businesses. Workshops would be nice."
  - "...Hewlett's ability to provide technical, management, strategic planning, and financial accounting support for its grantees could be very helpful to organizations that are open to 'audits' or collaborative staff development for grantees. The training could be done one-on-one, in regional meetings, or via webinars...."
  - "Helping leaders to diversify funding sources through more education."
- **Assistance Securing Funding From Other Sources (N=13)**
  - "Help to connect us to other funders."
  - "Offering additional connections to funders that can help us leverage our award would be very helpful."
  - "Because of its standing, Hewlett has the opportunity to leverage relationships for other funders. It would be amazing if they could convene grantees and other funders who may not be open to unsolicited proposals."
- **Convening (N=8)**
  - "I think it would have been great to have an opportunity to get together with Foundation staff and other grantees in our program area to share experiences, accomplishments and best practices...."
  - "The ability to convene best practices at a regional level as well as state based policy advocacy would be extremely helpful as well as the infrastructural challenges that NPOs face in board development (in earnest) and fundraising for individual giving specifically."
- **Other (N=4)**

PROPOSAL AND SELECTION PROCESS (12%)

- **Clarity of Process and Alignment (N=13)**
  - "More clarity as to the length of the funding. There were conversations about multi-year funding, that were mis-understood at this end as promises. It caused us to have to re-design our work and aggressively seek alternative funding sources."
  - "Even more conversation with program staff about how exactly our grant/project fits into the overall work the Foundation is trying to accomplish...."
  - "Help grantees understand the path toward funding clearly. We had a number of meetings and visits and phone calls without clear next steps or specific follow ups or decisions. So I would love to see Foundation staff communicate more clearly about what they need to know about an organization to make a decision on funding and move toward it more rapidly. Or, if not more rapidly, at least help make clear the information that they need to keep moving."
- **Application Requirements (N=12)**
  - "The logic model and evaluation chart we were asked to complete for our proposal was not useful and took a lot of time to organize. Suggest not using these tools."

- "Question the value of a Logic Model for a performing arts organization, outcomes are in many ways subjective and expansion is not a primary goal."
- "Get rid of those theory of change and logic model requirements."

- **Streamlining Proposal (N=11)**
  - "Improve the grant submission form. Reduce vague and repetitive categories in form. Improve clarity and purpose of form sections."
  - "Continuing clarification and simplification of application form would be appreciated...."
  - "While I understand the need for the lengthy proposal, it would help if the process was streamlined even further for small arts organizations that function with few staff members. The grant proposal process can be very time consuming and too costly to outsource."

- **Other (N=8)**

GRANTMAKING CHARACTERISTICS (11%)

- **Length of Grants (N=16)**
  - "Foundation may consider more long term and core support nature of grants for organisations doing serious work."
  - "The funding period (three years) is too short to allow the interventions to yield results, a longer period of at least five years would be more appropriate."
  - "Greater flexibility in the duration of funding. The amounts I received were often generous but could have been more strategic if they had been stretched over longer time periods."

- **Type of Grants (N=15)**
  - "Consider endowment funding or challenge grants for capital/endowment needs."
  - "Provide more core operating investment in building organizational capacity to sustain program work over the longer term, and to engage in iterative cycles of improvement."
  - "...Foundation should consider providing core funds for long term institutional development of southern think tanks.... "

- **Size of Grants (N=8)**
  - "Increase size of grants."
  - "I would appreciate if the Foundation were able to sustain us at a higher level, because it would significantly help us reach loftier goals in amplifying and creating arts in the Bay Area."

- **Other (N=1)**

IMPACT ON AND UNDERSTANDING OF GRANTEES' FIELDS (9%)

- **Sharing Knowledge (N=11)**
  - "It would be good if the Foundation could share the work of other grantees in the network."
  - "...I would love to see the Foundation do more with the information it is collecting from all of the San Francisco Performing Arts organizations and do more to help the entire community thrive on best practices within their operations."
  - "...When disruptive new practices emerge it would be helpful if the Foundation supported exploratory assessments of the impact of the emerging practices on the existing efforts and communicated these to the grantees."

- **Cross-Program Collaboration (N=9)**
  - "More communication and integration across the programs in the Foundation could have a significant impact..."
  - "More cross pollination between funding areas (e.g., Deeper Learning and Open Educational Resources) and opportunities to meet with related funding areas would be helpful."

- **Other (N=9)**

FOUNDATION COMMUNICATIONS (7%)

- **Clarity of Communications (N=13)**
  - "...Be much clearer about its own strategy on certain issues...."
  - "...I think an even clearer expression of the Foundation's giving strategies would help us to see the fit."
  - "Clarity around shifts in funding priorities. When portfolio's change focus (which is completely understandable), making sure that not only are program officers informing current grantees of the changes, but also reflecting those changes on the external website and other communications tools is critical. We were notified of dramatic changes in the portfolio we were funded by, but those changes are in no way reflected in the priorities listed on the Foundation's website, which leads to confusion."

- **Increased Communications (N=9)**
  - "More information on current priorities and strategy would be helpful."
  - "Grantees we work with could greatly benefit from hearing more on Hewlett's activities regularly and getting their involvement in the field more directly to promote their research uptake efforts."

- **Other (N=2)**

IMPACT ON AND UNDERSTANDING OF GRANTEES' ORGANIZATIONS (6%)

- **Understanding of Grantees' Organizations (N=11)**
  - "...I would encourage the Foundation staff to develop a deeper understanding of their grantees and to communicate how they see our work aligning with their work and goals and priorities."
  - " As noted in earlier responses, greater flexibility to recognize particular needs of particular grant recipients (i.e. a very small startup organization that could use relief from administrative requirements and assistance with growing the organization)...."
  - "Have a deeper understanding of those they support. While analytics can be a great tool and paper can say quite a bit, it is still no substitute for human interaction...."

- **Types of Organizations Funded (N=6)**
  - "I think there is some bias toward funding R1 institutions vs. 4-year/state universities and community colleges."
  - "Shift a significant amount of environmental funding from mainstream environmental organizations to environmental justice organizations, and urge other

foundations to do the same. EJ organizations have historically been underfunded, and are becoming more politically relevant, as was demonstrated by the People's Climate March."

- **Other (N=3)**

REPORTING/EVALUATION PROCESS (6%)

- **Streamlining Reports (N=7)**
  - "One suggestion would be simplifying the reporting process in a way that meets Foundation needs to measure the success of their investment and allows grantees to tell the story of their work in a less time and labor intensive way."
  - "As with most Foundations, the reporting process can be extremely difficult and time-consuming for a small staff, but these are important exercises and tools to help the Foundation staff better understand the needs and evolution of our organization. A move to web-based and standardized reporting structures would be a nice change."
- **Other (N=13)**

APPROACH TO STRATEGY DEVELOPMENT (5%)

- **Grantee Input (N=9)**
  - "...One small comment perhaps would be to involve more grantees in programmatic and strategic thinking, and work jointly towards identifying priorities as well as strategies for addressing them."
  - "There remains something theoretical and intellectual about their approach and strategy development. That is not a bad thing. However, I can't shake the sense that there is too small a set of stakeholders informing their approach and that is why the communication and implementation around their strategy seems so clunky, and their own theories of change seem less compelling."
  - "Establish a steering committee of experts from outside of the Foundation to take stock every three years of the disciplinary content of the program to get feedback on where innovative work has progressed and Foundation goals have been achieved (or not)."
- **Understanding of the Context of Grantees' Work (N=8)**
  - "Perhaps spend more time on the ground and get to know the country where the grantmaking is going on."
  - "A specific set of questions that allows staff to explore the operating context that potential grantees are working with would benefit both enormously. These questions could be deployed with varying levels of formality but it would signal to the prospective grantee that the Foundation is serious and capable of constructive support and not looking for simple, straightforward supplier relationship...."
- **Other (N=2)**

FUNDING TOPICS AND COMMUNITIES (5%)

- **Topic (N=13)**
  - "...I would love to see them fund water quantity and quality issues in the west, which they used to do...."
  - "Increase rather than reducing participation in key security issues of global concern."
  - "A decision to remain involved in the transportation field, working to support organizations that are actively and effectively working to reduce harmful greenhouse gas and criteria emissions...."
- **Other (N=4)**

ADMINISTRATIVE PROCESSES (1%)

- "A very minor comment is to fix the skip pattern in the post-submission survey."
- "...The guidelines could be simplified so as not to be quite so laborious."

OTHER (10%)

- **Staffing (N=12)**
  - "...The Foundation should probably look into a personnel management policy that allows it to retain talent in the organization."
  - "The term limits of program officers is beginning to become a factor in grantees' thinking because of the fear that once the current leaders time out, the Foundation will shift its priorities even though there is substantial momentum for the deeper learning work and there is still so much groundwork to be laid to achieve scalability and sustainability...."
  - "Hire program officers and consultants who have actually run a nonprofit before, who have front line experience in the trenches - fundraising, advocacy, or direct services. Hire program officers and consultants who have good reputation among nonprofits and are liked by nonprofits...."
- **Risk-Taking (N=9)**
  - "Be less risk averse. Encourage program officers to step outside their own and their bosses' comfort levels. Acknowledge just how in danger all things natural are and go big."
  - "The current philanthropy priorities are somewhat narrow and data driven. It would be great if Hewlett still did some out-of-the-box funding for riskier grass roots projects."
- **Collaboration with Other Funders (N=6)**
  - "As with many funders, Hewlett frequently encourages collaboration among grantees working in similar fields. However, I think they sometimes struggle to engage in the same level of collaboration with other funders that they expect from their grantees. I would encourage them to be willing to compromise a little more on their own goals and strategies in order to better collaborate with other funders working in the same area so that grantees don't feel so pulled between the (sometimes conflicting) directives of their many funders."
  - "Hewlett does a very good job of coordinating the efforts of other foundations, but could perhaps do even more...."
- **Other (N=9)**

GRANT LENGTH AND TYPE

Length of Grant Awarded (Overall)	Hewlett 2015	Hewlett 2013	Hewlett 2011	Hewlett 2009	Hewlett 2006	Hewlett 2003	Median Funder	Custom Cohort
Average grant length	2.5 years	2.4 years	2.6 years	2.4 years	2.6 years	2.4 years	2.1 years	2.5 years

Length of Grant Awarded (Overall)	Hewlett 2015	Hewlett 2013	Hewlett 2011	Hewlett 2009	Hewlett 2006	Hewlett 2003	Average Funder	Custom Cohort
1 year	24%	26%	21%	19%	20%	28%	49%	23%
2 years	33%	32%	36%	35%	35%	33%	22%	34%
3 years	36%	34%	36%	40%	37%	29%	17%	27%
4 years	2%	2%	3%	3%	2%	4%	4%	6%
5 or more years	5%	5%	4%	3%	6%	6%	8%	10%

Type of Grant Awarded (Overall)	Hewlett 2015	Hewlett 2013	Hewlett 2011	Hewlett 2009	Hewlett 2006	Average Funder	Custom Cohort
Program / Project Support	51%	55%	51%	53%	56%	64%	75%
General Operating / Core Support	44%	40%	43%	43%	39%	20%	14%
Capital Support: Building / Renovation / Endowment Support / Other	0%	0%	0%	1%	1%	7%	2%
Technical Assistance / Capacity Building	2%	3%	4%	2%	2%	4%	4%
Scholarship / Fellowship	2%	1%	1%	1%	2%	2%	3%
Event / Sponsorship Funding	1%	1%	1%	0%	0%	2%	1%

GRANT LENGTH AND TYPE - BY SUBGROUP

Length of Grant Awarded (By Subgroup)	Education	Environment	Global Development and Population	Performing Arts	Madison Initiative
Average grant length	2.1 years	2.2 years	2.5 years	3.3 years	2.1 years

Length of Grant Awarded (By Subgroup)	Education	Environment	Global Development and Population	Performing Arts	Madison Initiative
1 year	33%	33%	15%	3%	34%
2 years	33%	43%	43%	16%	37%
3 years	27%	16%	31%	76%	26%
4 years	3%	2%	4%	0%	0%
5 or more years	3%	6%	7%	5%	3%

Type of Grant Awarded (By Subgroup)	Education	Environment	Global Development and Population	Performing Arts	Madison Initiative
Program / Project Support	73%	68%	63%	11%	59%
General Operating / Core Support	20%	30%	34%	85%	31%
Capital Support: Building / Renovation / Endowment Support / Other	0%	0%	0%	1%	0%
Technical Assistance / Capacity Building	1%	1%	0%	2%	0%
Scholarship / Fellowship	3%	1%	1%	0%	8%
Event / Sponsorship Funding	3%	0%	2%	0%	3%

GRANT SIZE

Grant Amount Awarded (Overall)	Hewlett 2015	Hewlett 2013	Hewlett 2011	Hewlett 2009	Hewlett 2006	Hewlett 2003	Median Funder	Custom Cohort
Median grant size	$300K	$210K	$270K	$300K	$250K	$250K	$64K	$300K

Grant Amount Awarded (Overall)	Hewlett 2015	Hewlett 2013	Hewlett 2011	Hewlett 2009	Hewlett 2006	Hewlett 2003	Average Funder	Custom Cohort
Less than $10K	1%	1%	0%	0%	0%	0%	11%	1%
$10K - $24K	1%	2%	2%	1%	2%	2%	15%	3%
$25K - $49K	4%	6%	6%	3%	3%	4%	14%	5%
$50K - $99K	11%	13%	13%	10%	11%	13%	16%	9%
$100K - $149K	10%	12%	11%	10%	10%	10%	9%	8%
$150K - $299K	22%	22%	20%	24%	26%	25%	15%	19%
$300K - $499K	17%	15%	15%	17%	20%	16%	7%	16%
$500K - $999K	16%	14%	16%	16%	14%	16%	6%	15%
$1MM and above	17%	15%	18%	17%	14%	13%	7%	25%

Median Percent of Budget Funded by Grant (Annualized) (Overall)	Hewlett 2015	Hewlett 2013	Hewlett 2011	Hewlett 2009	Hewlett 2006	Hewlett 2003	Median Funder	Custom Cohort
Size of grant relative to size of grantee budget	5%	4%	6%	6%	6%	7%	4%	5%

GRANT SIZE - BY SUBGROUP

Grant Amount Awarded (By Subgroup)	Education	Environment	Global Development and Population	Performing Arts	Madison Initiative
Median grant size	$400K	$360K	$500K	$120K	$250K

Grant Amount Awarded (By Subgroup)	Education	Environment	Global Development and Population	Performing Arts	Madison Initiative
Less than $10K	1%	0%	2%	1%	0%
$10K - $24K	1%	0%	0%	3%	0%
$25K - $49K	0%	2%	2%	7%	3%
$50K - $99K	7%	8%	1%	29%	13%
$100K - $149K	9%	10%	3%	17%	18%
$150K - $299K	16%	14%	19%	29%	18%
$300K - $499K	20%	26%	16%	8%	24%
$500K - $999K	23%	16%	26%	6%	13%
$1MM and above	21%	25%	31%	1%	11%

Median Percent of Budget Funded by Grant (Annualized) (By Subgroup)	Education	Environment	Global Development and Population	Performing Arts	Madison Initiative
Size of grant relative to size of grantee budget	4%	7%	6%	4%	4%

GRANTEE BUDGET

Operating Budget of Grantee Organization (Overall)	Hewlett 2015	Hewlett 2013	Hewlett 2011	Hewlett 2009	Hewlett 2006	Hewlett 2003	Median Funder	Custom Cohort
Median Budget	$2.7M	$2.6M	$2.1M	$2.0M	$2.0M	$1.8M	$1.4M	$3.0M

Operating Budget of Grantee Organization (Overall)	Hewlett 2015	Hewlett 2013	Hewlett 2011	Hewlett 2009	Hewlett 2006	Hewlett 2003	Average Funder	Custom Cohort
<$100K	1%	1%	2%	1%	1%	2%	9%	3%
$100K - $499K	13%	12%	14%	15%	15%	20%	20%	12%
$500K - $999K	9%	13%	16%	16%	15%	13%	14%	10%
$1MM - $4.9MM	38%	33%	34%	33%	33%	36%	29%	29%
$5MM - $24MM	23%	24%	20%	19%	22%	18%	17%	24%
>=$25MM	16%	16%	15%	15%	14%	12%	11%	21%

GRANTEE BUDGET - BY SUBGROUP

Operating Budget of Grantee Organization (By Subgroup)	Education	Environment	Global Development and Population	Performing Arts	Madison Initiative
Median Budget	$5.0M	$3.2M	$4.5M	$1.1M	$2.4M

Operating Budget of Grantee Organization (By Subgroup)	Education	Environment	Global Development and Population	Performing Arts	Madison Initiative
<$100K	0%	1%	1%	1%	3%
$100K - $499K	4%	9%	8%	28%	0%
$500K - $999K	2%	6%	7%	18%	17%
$1MM - $4.9MM	42%	44%	36%	35%	40%
$5MM - $24MM	36%	19%	28%	13%	17%
>=$25MM	15%	21%	20%	4%	23%

FUNDING RELATIONSHIP

Pattern of Grantees' Funding Relationship with the Foundation (Overall)	Hewlett 2015	Hewlett 2013	Hewlett 2011	Average Funder	Custom Cohort
First grant received from the Foundation	20%	16%	20%	29%	34%
Consistent funding in the past	67%	69%	69%	52%	44%
Inconsistent funding in the past	13%	16%	11%	18%	22%

Funding Status and Grantees Previously Declined Funding (Overall)	Hewlett 2015	Hewlett 2013	Hewlett 2011	Hewlett 2009	Hewlett 2006	Hewlett 2003	Median Funder	Custom Cohort
Percent of grantees currently receiving funding from the Foundation	84%	85%	88%	89%	84%	86%	78%	84%
Percent of grantees previously declined funding by the Foundation	14%	18%	15%	19%	17%	N/A	27%	22%

Behind the numbers: Hewlett grantees who report receiving consistent funding from Hewlett rate significantly more positively than grantees who have received inconsistent or no past funding for the Foundation's impact on grantees' fields, communities, organizations, and overall funder-grantee relationships.

FUNDING RELATIONSHIP - BY SUBGROUP

Pattern of Grantees' Funding Relationship with the Foundation (By Subgroup)	Education	Environment	Global Development and Population	Performing Arts	Madison Initiative
First grant received from the Foundation	18%	15%	17%	12%	66%
Consistent funding in the past	59%	77%	71%	83%	11%
Inconsistent funding in the past	23%	8%	12%	5%	23%

Funding Status and Grantees Previously Declined Funding (By Subgroup)	Education	Environment	Global Development and Population	Performing Arts	Madison Initiative
Percent of grantees currently receiving funding from the Foundation	82%	86%	86%	95%	87%
Percent of grantees previously declined funding by the Foundation	17%	21%	11%	12%	3%

RESPONDENT DEMOGRAPHICS

Job Title of Respondents (Overall)	Hewlett 2015	Hewlett 2013	Hewlett 2011	Hewlett 2009	Hewlett 2006	Hewlett 2003	Average Funder	Custom Cohort
Executive Director	44%	39%	38%	44%	41%	43%	47%	38%
Other Senior Management	22%	20%	18%	15%	15%	12%	14%	20%
Project Director	14%	16%	16%	16%	18%	18%	12%	22%
Development Director	7%	10%	11%	10%	8%	11%	10%	7%
Other Development Staff	7%	8%	9%	9%	8%	8%	7%	5%
Volunteer	0%	0%	0%	0%	0%	0%	1%	0%
Other	6%	8%	7%	7%	9%	9%	9%	9%

Gender of Respondents (Overall)	Hewlett 2015	Hewlett 2013	Hewlett 2011	Hewlett 2009	Hewlett 2006	Average Funder	Custom Cohort
Female	57%	57%	55%	56%	50%	63%	54%
Male	43%	43%	45%	44%	50%	37%	46%

Race/Ethnicity of Respondents (Overall)	Hewlett 2015	Hewlett 2013	Hewlett 2011	Hewlett 2009	Average Funder	Custom Cohort
Multi-racial	4%	4%	3%	1%	2%	3%
African-American/Black	5%	5%	4%	6%	7%	7%
Asian (incl. Indian subcontinent)	8%	7%	8%	6%	3%	6%
Hispanic/Latino	7%	5%	5%	8%	5%	6%
American Indian/Alaskan Native	0%	0%	0%	0%	1%	1%
Pacific Islander	0%	0%	0%	0%	0%	0%
Caucasian/White	75%	75%	77%	75%	80%	75%
Other	2%	3%	3%	4%	1%	2%

Funder Characteristics

Financial Information (Overall)	Hewlett 2015	Hewlett 2013	Hewlett 2011	Hewlett 2009	Hewlett 2006	Hewlett 2003	Median Funder	Custom Cohort
Total assets	$9.0B	$7.7B	$7.4B	$7.8B	$7.3B	$6.0B	$199.2M	$5.7B
Total giving	$434.2M	$380.9M	$358.1M	$380.8M	$320.1M	$258.0M	$13.5M	$233.0M

Funder Staffing (Overall)	Hewlett 2015	Hewlett 2013	Hewlett 2011	Hewlett 2009	Hewlett 2006	Hewlett 2003	Median Funder	Custom Cohort
Total staff (FTEs)	112	108	102	105	97	30	13	112
Percent of staff (FTEs) actively managing grantee relationships	42%	41%	25%	N/A	N/A	N/A	42%	39%
Percent of staff who are program staff	42%	45%	45%	51%	50%	100%	41%	38%

Grantmaking Processes (Overall)	Hewlett 2015	Hewlett 2013	Hewlett 2011	Hewlett 2009	Median Funder	Custom Cohort
Proportion of grants that are proactive	99%	99%	99%	N/A	42%	98%
Proportion of grantmaking dollars that are proactive	99%	99%	99%	75%	50%	98%

ADDITIONAL SURVEY INFORMATION

On many questions in the grantee survey, grantees are allowed to select “don’t know” or “not applicable” if they are not able to provide an alternative answer. In addition, some questions in the survey are only displayed to a select group of grantees for which that question is relevant based on a previous response.

As a result, there are some measures where only a subset of responses is included in the reported results. The table below shows the number of responses included on each of these measures. The total number of respondents to Hewlett’s grantee survey was 707.

Question Text	N
Overall, how would you rate the Foundation's impact on your field?	676
How well does the Foundation understand the field in which you work?	677
To what extent has the Foundation advanced the state of knowledge in your field?	609
To what extent has the Foundation affected public policy in your field?	540
Overall, how would you rate the Foundation's impact on your local community?	473
How well does the Foundation understand the local community in which you work?	459
How well does the Foundation understand the social, cultural, or socioeconomic factors that affect your work?	664
How much, if at all, did the Foundation improve your ability to sustain the work funded by this grant in the future?	662
How well does the Foundation understand your organization's strategy and goals?	691
Which of the following statements best describes the primary effect the receipt of this grant had on your organization's programs or operations?	693
How consistent was the information provided by different communication resources, both personal and written, that you used to learn about the Foundation?	680
Who most frequently initiated the contact you had with your program officer during this grant?	703
Did the Foundation conduct a site visit during the selection process or during the course of this grant?	676
Has your main contact at the Foundation changed in the past six months?	688
Did you submit [a proposal] to the Foundation for this grant?	699
As you developed your grant proposal, how much pressure did you feel to modify your organization's priorities in order to create a grant proposal that was likely to receive funding?	685
How involved was Foundation staff in the development of your grant proposal?	678
How much time elapsed from the submission of the grant proposal to clear commitment of funding?	628
Was there or will there be a reporting/evaluation process?	691
Was an external evaluator involved in your reporting/evaluation process?	385
After submission of your report/evaluation, did the Foundation or the evaluator discuss it with you?	409
At any point during the application or the grant period, did the Foundation and your organization exchange ideas regarding how your organization would assess the results of the work funded by this grant?	629
Have you ever been declined funding from the Foundation?	563
Are you currently receiving funding from the Foundation?	697
Which of the following best describes the pattern of your organization's funding relationship with the Foundation?	683
OE grant purpose - Strategic Planning	199
OE grant purpose - Leadership Development	199
OE grant purpose - Fund Development	199
OE grant purpose - Evaluation	199
OE grant purpose - Communications Planning	199
OE grant purpose - Technology Development	199
OE grant purpose - Other	199
Source of knowledge about Hewlett's grantmaking priorities - Trade Media	684
Source of knowledge about Hewlett's grantmaking priorities - Philanthropy resource centers	684
Source of knowledge about Hewlett's grantmaking priorities - Other funders	684

Source of knowledge about Hewlett's grantmaking priorities - Word of mouth	684
Source of knowledge about Hewlett's grantmaking priorities - Other	684
"Have you received a supplemental OE capacity building grant in addition to you primary grant?"	651
"How often do you visit the Hewlett website?"	695
Extent to which OE grant strengthened performance	183
Preparing the info required for the application has been helpful for our organization's internal strategic planning and management	679
Given the amount of funding we received, the level of effort required to complete the application requirements is appropriate	690
Preparing the info required for reports has been helpful for our organization's internal strategic planning and management	652
Given the amount of funding we received, the level of effort required to complete the reporting requirements is appropriate	663
Flexibility of Hewlett in making adjustments to the application requirements	292
Flexibility of Hewlett in making adjustments to the reporting requirements	313
Ease of online process for application materials	528
Ease of online process for progress/final report materials	496

MISSION

To provide data and create insight so philanthropic funders can better define, assess, and improve their effectiveness – and, as a result, their intended impact.

VISION

We seek a world in which pressing social needs are more effectively addressed.

We believe improved performance of philanthropic funders can have a profoundly positive impact on nonprofit organizations and the people and communities they serve.

Although our work is about measuring results, providing useful data, and improving performance, our ultimate goal is improving lives. We believe this can only be achieved through a powerful combination of dispassionate analysis and passionate commitment to creating a better society.

ABOUT THE GPR

Since 2003, the Grantee Perception Report® (GPR) has provided funders with comparative, candid feedback based on grantee perceptions. The GPR is the only grantee survey process that provides comparative data, and is based on extensive research and analysis. Hundreds of funders of all types and sizes have commissioned the GPR, and tens of thousands of grantees have provided their perspectives to help funders improve their work. CEP has surveyed grantees in more than 150 countries and in 8 different languages.

The GPR's quantitative and qualitative data helps foundation leaders evaluate and understand their grantees' perceptions of their effectiveness, and how that compares to their philanthropic peers.

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