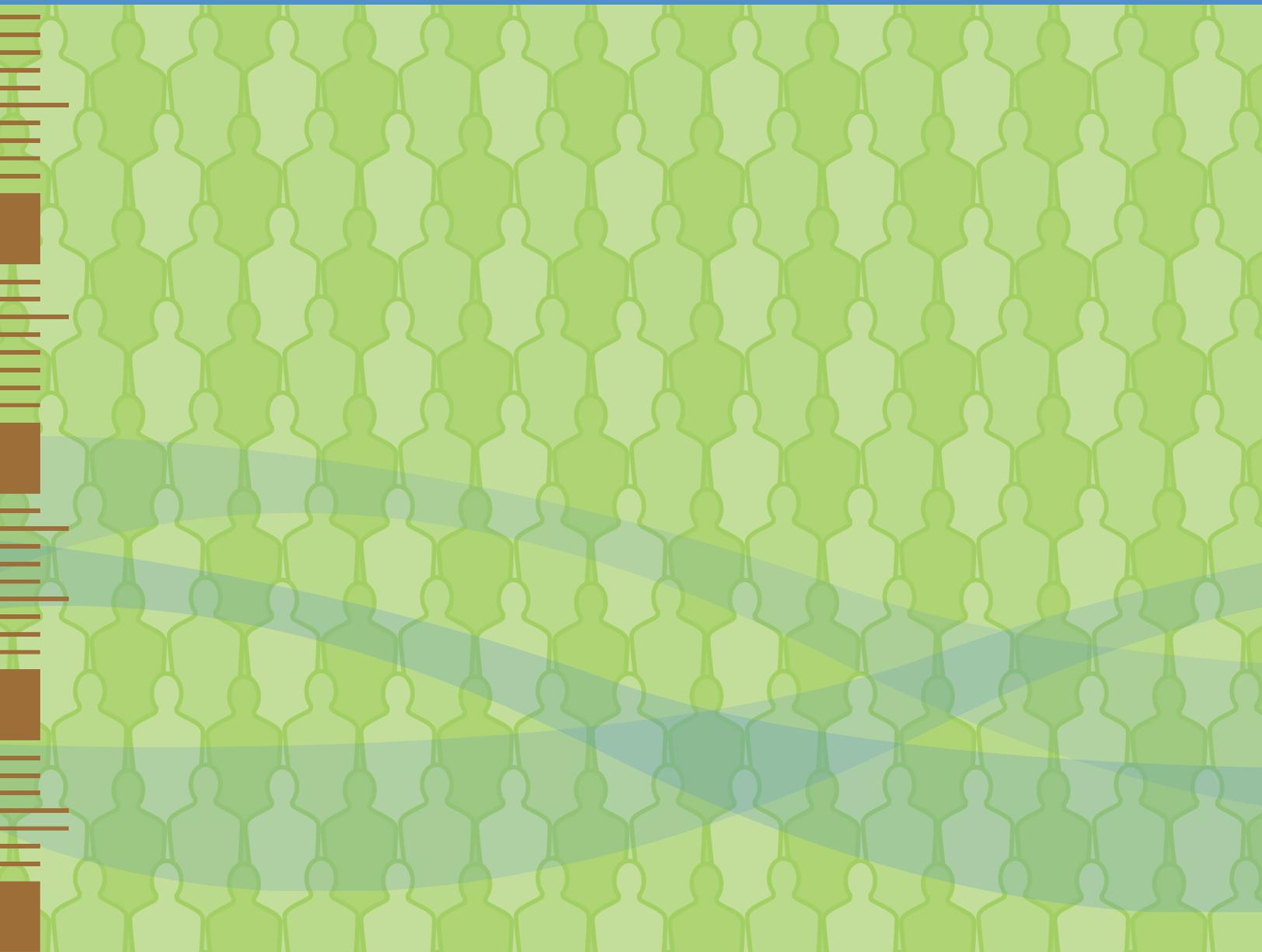




THE CENTER FOR
EFFECTIVE PHILANTHROPY

WORKING WITH GRANTEES

THE KEYS TO SUCCESS AND FIVE PROGRAM OFFICERS WHO EXEMPLIFY THEM





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About the Center for Effective Philanthropy

The mission of the Center for Effective Philanthropy (CEP) is to provide data and create insight so philanthropic funders can better define, assess, and improve their effectiveness and impact.

This mission is based on a vision of a world in which pressing social needs are more effectively addressed. It stems from a belief that improved performance of funders, and in particular foundations, can have a profoundly positive impact on nonprofit organizations and those 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.

For more information on CEP, please visit www.effectivephilanthropy.org.

Funders

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This paper is based on CEP's independent data analyses, and CEP is solely responsible for its content. This report does not necessarily reflect the individual views of the funders, advisers, or others listed above.

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Introduction

Foundations seek to achieve positive impact on some of our toughest social challenges. Global climate change. Education. Homelessness. Inequality. But foundations have impact primarily through others – the nonprofits they fund. Without their grantees, foundations would achieve little.

Knowing this, foundation leaders have long embraced, at least rhetorically, the notion that the foundation-grantee relationship is a vital one. Over the past decade, this attention has only increased, as foundations seek new kinds of feedback and make changes in an effort to strengthen these ties.¹ Paul Beudet, associate director of the Wilburforce Foundation, explains why strong relationships with grantees matter in the context of Wilburforce’s strategy for achieving impact:

At the very basic level, solid relationships with grantees are critically important because grantees are a very good source of information for us. They are the ones doing the on-the-ground work. They’re likely to have a much more nuanced and deeper understanding of the context for the work that needs to be done in the particular places that we care about. If we have high-quality, long-term,

trust-based relationships with grantees, we believe that we’ll have better knowledge around which we can make smart investments in their organizational and programmatic capacity, helping them to achieve their outcomes more efficiently and effectively. Since our investments are initially predicated on a clear alignment between grantees’ programmatic outcomes and our own, if they can achieve their outcomes, we are confident that we will see the kind of sustained change that is consistent with our mission.²

Different foundations will articulate the importance of the foundation-grantee relationship in different ways. But, to the extent that a foundation seeks to achieve impact through grantmaking – recognizing that there are, of course, other ways for a foundation to achieve impact – the strength of foundation-grantee relationships is paramount.

Countless articles and conference sessions have explored foundation-grantee relationships, and many nonprofit leaders and academics have critiqued the way foundations interact with their grantees.³ Writing in the *Wall Street Journal*, foundation critic Pablo Eisenberg argues, “Foundation

¹ Grantcraft, Grantmakers for Effective Organizations, and the Center for Effective Philanthropy were founded within roughly the past ten years, and all have devoted significant attention to this issue. Some 200 foundations, including eight of the ten largest in the country, have participated in CEP’s Grantee Perception Report® (GPR) process.

² Ellie Buteau, Phil Buchanan, and Andrea Brock. *Essentials of Foundation Strategy*. Center for Effective Philanthropy (December 2009): 20.

³ For examples of articles on foundation-grantee relationships, see Grantmakers for Effective Organizations, “Change Agent Project: Barriers to Grantee Success,” November 2006; *The Nonprofit Quarterly*, “A Case of Arrested Development: The Grantee/Funder Relationship,” Spring 2004; David, Tom, “Grantor-Grantee Relationships,” Marguerite Casey Foundation, 2003. For examples of critiques of the way foundations interact with grantees, see *Chronicle of Philanthropy*, “A Major Philanthropist’s Giving Comes Under Fire,” *Philanthropy Today* Blog, February 2007; Wolverson, Brad, “Founder of eBay Announces New Approach to His Giving,” *Chronicle of Philanthropy*, April 2004.

practices today are too bureaucratic, inflexible and cautious, and too focused on short-term objectives. Too often, the process and procedures of grantmaking are more tailored to the needs of foundations and their trustees than to the requirements of nonprofits.”⁴

While many claim to speak for nonprofits, it is only recently that research has allowed for a deeper understanding of their perspectives that goes beyond individuals’ anecdotes and opinions. The Center for Effective Philanthropy (CEP) has, over the past eight years, analyzed its ever-growing dataset of tens of thousands of grantee surveys to identify what nonprofits value in their foundation funders. (See “Building Knowledge.”) Among the crucial dimensions that repeatedly arise as important



While many claim to speak for nonprofits, it is only recently that research has allowed for a deeper understanding of their perspectives that goes beyond individuals’ anecdotes and opinions.

statistical predictors of grantees’ satisfaction with foundations, as well as the extent to which they experience the foundations’ impact on their organizations, are how foundation staff interact

BUILDING KNOWLEDGE

CEP HAS BEEN ANALYZING grantee survey data and publishing the results since 2004, when we released *Listening to Grantees: What Nonprofits Value in Their Foundation Funders*. That report discussed the three dimensions that best predict variation in grantees’ satisfaction with their funders and the impact they perceive their funder to have had on their organization: quality of interactions with foundation staff, clarity of communications of a foundation’s goals and strategy, and external orientation of the foundation.

Our 2006 report, *Foundation Communications: The Grantee Perspective*, analyzed further how to improve communications, offering foundations practical steps based on additional analysis of our grantee survey dataset.

Since our 2004 and 2006 research reports, we have added new items to our survey of grantees, including one asking grantees about consistency of various communications resources from a foundation. In addition, an increasing number of foundations have added an optional question asking grantees to identify their primary contact during the course of a grant.

These changes have allowed us to conduct new analyses and revealed new insights into the foundation-grantee relationship.

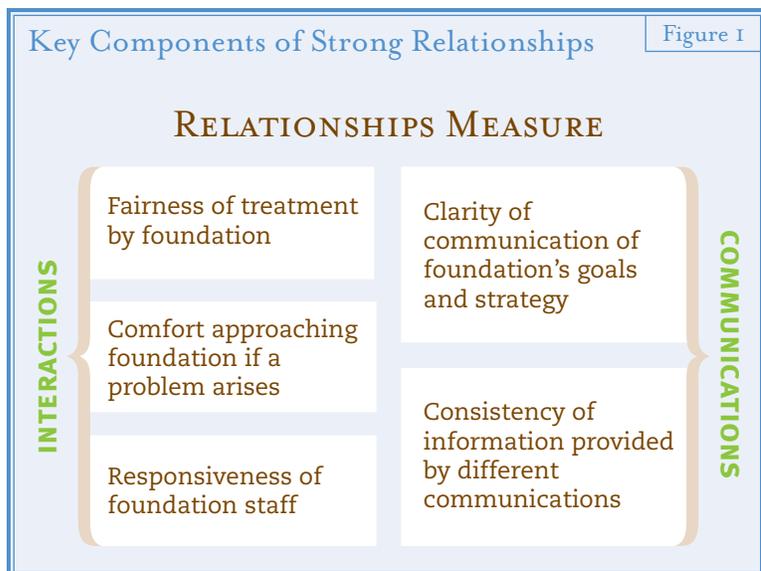
- » Our statistical analyses indicate that two of the dimensions we reported on in 2004, interactions and clarity of communications of goals and strategy, are – along with the new item on consistency of communication – getting at one underlying construct: relationships.
- » The addition of the primary contact question for many foundations has allowed us to understand better the importance of individual program officers in shaping the grantee experience, as we reported in the *Stanford Social Innovation Review* article “Luck of the Draw” (2007). These findings have also shaped our latest research, reported here.

In this report, we aim to offer foundations and program officers insights to help them strengthen their relationships with grantees. We continue to expand and explore our database of grantee survey data and encourage ideas from those working within foundations – as well as grantees – about what would be most helpful in improving foundation and grantee effectiveness.

⁴ Eisenberg, Pablo. “What’s Wrong With Charitable Giving – and How to Fix It.” *The Wall Street Journal* (November 9, 2009).

Key Components of Strong Relationships

Figure 1



and communicate with grantees.⁵ Our analyses indicate that these components – interactions and communications – are highly related, and both tap into a larger construct: relationships.

Five items grantees respond to in our survey measure the extent to which these interaction and communication components exist in a foundation-grantee relationship. (See Figure 1.) They are: 1) Fairness of treatment by the foundation; 2) Comfort approaching the foundation if a problem arises; 3) Responsiveness of the foundation staff;

While it is true that foundations may have standard processes or an organization-wide culture that influence grantees' experience, it is often the program officer who makes or breaks that experience.

4) Clarity of communication of the foundation's goals and strategy; and 5) Consistency of information provided by different communication resources. Taken together, they form what we call the Relationships Measure.

The idea that productive relationships with grantees require responsiveness, fairness, approachability, and clear and consistent communication hardly seems radical. But our data demonstrate that grantees see much room for improvement by foundation staff. CEP has analyzed more than 9,600 suggestions from grantees about how foundations could improve, and for the typical foundation, about a quarter of suggestions focus on these issues. (See "Grantee Suggestions for Funder Improvement.")

The Importance of the Program Officer

It will come as no surprise to any nonprofit leader that foundations vary in the degree to which they establish strong relationships with grantees. In our analysis of grantee ratings of foundations, we see foundations of various sizes, types, and programmatic focuses achieve higher and lower ratings on the Relationships Measure.

Frequently, however, we see as much variation in grantee ratings *within* a foundation as across foundations. That variation is largely a function of "luck of the draw" – that is, which program officer grantees happen to be assigned – with grantees of the same foundation sometimes having radically different experiences. While it is true that foundations may have standard processes or an organization-wide culture that influence grantees' experience, it is often the program officer who makes or breaks that experience. As we have noted in previous research on the role of the program officer, "individual program officers often play a larger role in grantees' experience than do the foundations for which they work."⁶

⁵ Kevin Bolduc, Phil Buchanan, and Judy Huang. *Listening to Grantees: What Nonprofits Value in Their Foundation Funders*. Center for Effective Philanthropy (April 2004); Judy Huang. *Foundation Communications: The Grantee Perspective*. Center for Effective Philanthropy (February 2006).

⁶ Kevin Bolduc, Phil Buchanan, and Ellie Buteau, Center for Effective Philanthropy. "Luck of the Draw," *Stanford Social Innovation Review* (March 2007): 40-45.

Yet, all too often, foundation leaders do not know how their program officers are affecting their grantees. For those foundation leaders who have asked CEP to survey their grantees and segment results by program officer, the results can be startling. At some foundations, we have seen variation that spans the range of our entire data set of grantee perceptions of more than 200 foundations: program officers who are rated among the best and among the worst working within the walls of the same foundation.

It is important to acknowledge that factors outside program officers' control can influence their ability to perform well on the items that comprise the Relationships Measure. Program officers need support and resources to be successful, and they do their work within certain structures established by foundation leadership. It is also true that it can be more difficult to form strong relationships with some grantees than others. Still, our analyses indicate that considerable variation in grantee experience exists as a result of the way individual program officers approach their work.

We have seen program officers who are rated among the best and among the worst working within the walls of the same foundation.

Because of this variation, we highlight in this report five program officers as exemplars. They have managed to do particularly well – in the eyes of their grantees – at developing strong foundation-grantee relationships. Indeed, they are five of the best in our dataset.

We hope their experiences will inspire foundation leaders and program officers to get more clarity about what they need to do to achieve this kind of performance.

GRANTEE SUGGESTIONS FOR FUNDER IMPROVEMENT

THE FOUNDATION-GRANTEE RELATIONSHIP is about much more than just a check. CEP has analyzed more than 9,600 suggestions from grantees about how foundations could improve, and for the typical foundation, about a quarter of these suggestions focus on the interactions and communications between grantees and foundations.

Here are a few typical negative grantee comments about foundation interactions and communications:

- » “When hiring staff, think carefully about how good they are at interacting with different kinds of people in a respectful way. I have seen some staff be really condescending to people who they didn’t think mattered. When that happens, people in the community talk, and it gives the foundation a bad reputation.”
- » “A more well-informed and trained program officer and more consistent application of the [funder’s] guidelines and funding procedures from one year to the next would help enormously.”

- » “A better funder would listen more, talk less, and collaboratively develop solutions to conflicts in the relationship. So often, the satisfaction is dependent upon who your program officer is and what their other responsibilities are at the foundation (i.e., whether they have the staff and/or time to devote to working with you).”

But when interactions and communications go well, grantees notice:

- » “The foundation is well-run; grant officers are approachable and interested. Our grant officer has a deep knowledge of the field, asks good questions, and is willing to work through adjustments as conditions on the ground change. This allows us to be honest and to keep improving delivery.”
- » “Very knowledgeable and thorough. The staff always provided accurate information and has responded immediately to any question or concern.”

Overview of Research Approach

What can foundation leaders and their program officers do to establish strong foundation-grantee relationships? What are the key characteristics of these relationships? How do program officers who have managed to excel in this area do it?

» Using a regression analysis, we sought to understand what best predicts grantee ratings on the Relationships Measure. This analysis was conducted on 25,749 completed surveys of grantees of 175 foundations. (See “Appendix: Methodology.”)

- We identified four keys to higher grantee ratings of foundations on the Relationships Measure. (See Figure 2.)
 - **Understanding:** Understanding of funded organizations’ goals and strategies
 - **Selection:** Helpfulness of selection process and mitigation of pressure to modify priorities

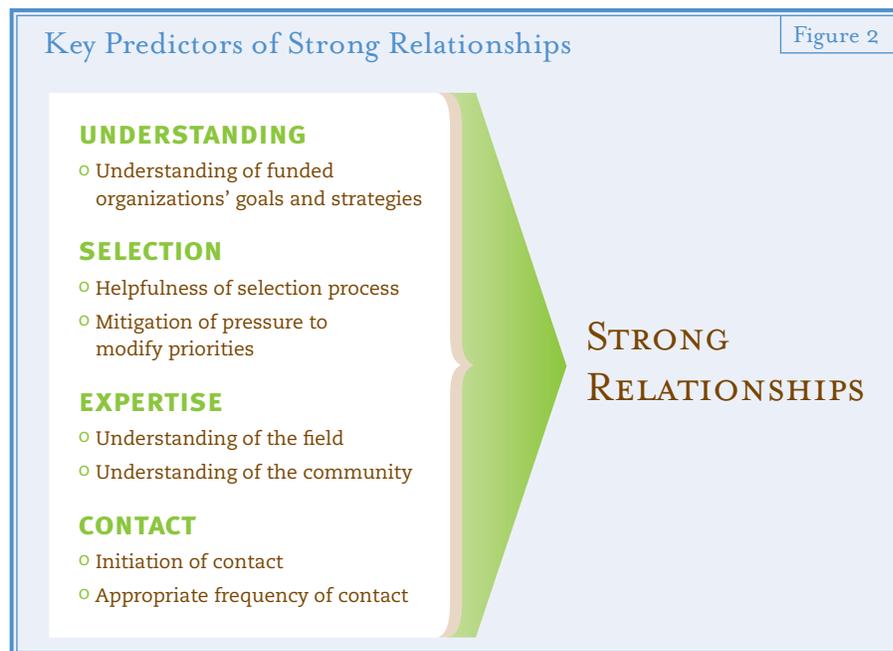
- **Expertise:** Understanding of fields and communities
- **Contact:** Initiation of contact with appropriate frequency

» Using qualitative analysis, we systematically coded the contents of 9,632 grantee suggestions for improvements in foundation services or processes. These grantee suggestions are quoted throughout the report.

» We identified the highest-performing 20 percent of primary contacts on the Relationships Measure in our dataset of 266 primary contacts from 32 foundations.

- We randomly selected five program officers to interview to gain an understanding of how they approach their work.⁷ (See “Five High-Performing Program Officers.”) They are:

- Nicole Gray, The William and Flora Hewlett Foundation⁸
- Chris Kabel, Northwest Health Foundation
- Justin Laing, The Heinz Endowments
- Wendy Liscow, The Geraldine R. Dodge Foundation
- Tara Seeley, Central Indiana Community Foundation



⁷ Only primary contacts with at least 10 grantee respondents to the items comprising the Relationships Measure were included in this dataset. After we identified the top 20 percent, random selection was stratified by foundation type to ensure that a program officer from a community foundation and a program officer from a health conversion foundation would be among those interviewed.

⁸ Disclosure: The William and Flora Hewlett Foundation provides significant grant support to CEP (\$500,000 in 2010).

FIVE HIGH-PERFORMING PROGRAM OFFICERS

NICOLE GRAY



Position: Program officer in population

Foundation: The William and Flora Hewlett Foundation, with assets of \$6.2 billion

Foundation location: Menlo Park, California

Tenure: Eight years

Portfolio: 50 grantees

Previous experience: Research associate at The David and Lucile Packard Foundation

WENDY LISCOW



Position: Program officer

Foundation: The Geraldine R. Dodge Foundation, with assets of \$240 million

Foundation location: Morristown, New Jersey

Tenure: Seven years

Portfolio: 60 grantees

Previous experience:

Director of programs and services for the New Jersey Theatre Alliance

CHRIS KABEL



Position: Program officer

Foundation: Northwest Health Foundation, with assets of \$80 million

Foundation location: Portland, Oregon

Tenure: Five years

Portfolio: 62 grantees

Previous experience: Director of foundation relations at the Oregon Health & Science University Foundation

For videos on the program officer perspective on working with grantees, see www.effectivephilanthropy.org.

JUSTIN LAING



Position: Program officer in arts & culture

Foundation: The Heinz Endowments, with assets of \$1.2 billion

Foundation location: Pittsburgh, Pennsylvania

Tenure: Four years

Portfolio: 60 grantees

Previous experience: Manager/assistant artistic director of Nego Gato, an African-Brazilian arts organization

TARA SEELEY



Position: Grants officer in community development

Foundation: Central Indiana Community Foundation, with assets of \$470 million

Foundation location: Indianapolis, Indiana

Tenure: Six years

Portfolio: 81 grantees

Previous experience: Executive director of Interfaith Housing Coalition

Key Findings

FINDING: The degree to which grantees believe foundation staff have a thorough understanding of their organizations' goals and strategies is the strongest predictor of ratings on the Relationships Measure.

THIS UNDERSTANDING IS ESSENTIAL: Our statistical model suggests that, unless grantees believe their program officers understand their organizations' goals and strategies, there is little chance for a strong relationship. At some level, this may not seem surprising. Good relationships of any kind are rooted in mutual understanding – but this is not always acknowledged in foundation-grantee relationships.

“I would really like [the program officer] to take the time to understand our strategy,” says one grantee. “Once in a while, encourage an application based on our programs and goals – instead of insisting that we simply follow theirs or be denied funding.”

Another grantee explains how a foundation's lack of understanding limited a grant's impact on the grantee's organization: “Because the foundation was so rigid in its mandate for how the funds were to be spent, they have not been helpful to our organization. This made me think the foundation had a very limited understanding of what we were actually trying to do.”

“So often organizations are just working with too few resources, and I've been on that side of the table. So, I always go into meetings with grantee organizations with a whole lot of respect for what folks are doing and a whole lot of empathy for what they're trying to do.”

– Tara Seeley

But the grantees of the five high-performing program officers we interviewed are having a different experience. These program officers feel passionately that they must develop an understanding of the organizations they fund if they are to be successful in their work. “I can't imagine doing the job I do without understanding a grantee's mission. It would be nearly impossible,” says Chris Kabel of the Northwest Health Foundation.

Wendy Liscow of The Geraldine R. Dodge Foundation describes her approach to developing an understanding of her grantee organizations' goals and strategies and how that helps her determine which organizations to fund. “Whenever we go to talk with an organization, we talk to them in terms of where they are in their life cycle, and how that influences their strategic goals,” she says. As a result of her efforts to understand better the organizations she funds, she has learned that,

in a rush to make a difference in their communities and fields, nonprofits often underinvest in the development of their organizations. She understands that this development is essential if the nonprofit is to be effective in carrying out the work for which it is funded: “We often fund [a grantee’s] strategic planning process through our capacity-building program,” Liscow says. “And we are very careful about not providing funding that does not have the capacity and support underneath it.”

There need not be a trade-off between a focus on impact and a focus on understanding the goals and strategies of grantee organizations. The five program officers we interviewed see them as interdependent. This view partly stems from their own experience of having been grantees of foundations – an experience all of the five program officers share. As Tara Seeley of Central Indiana Community Foundation says, “So often organizations are just working with too few resources, and I’ve been on that side of the table. So, I always go into meetings with grantee organizations with a whole lot of respect for what folks are doing and a whole lot of empathy for what they’re trying to do.”

FINDING:

Grantees rate foundation staff higher on the Relationships Measure when they find the selection process helpful in strengthening their organization or funded work and when they perceive less pressure to modify their priorities to receive funding.

WHILE THE PRIMARY PURPOSE of a foundation’s selection process is to understand whether the grantee is the right choice to help the foundation achieve its goals, it is also a crucially important time for grantees in shaping their relationship with their funders. It can strengthen grantees and can help them feel either supported or pressured to modify their priorities to receive funding. Although some structural elements of the selection process are constant for all program staff within a given foundation, a program officer can be more or less helpful within that process – or put more or less pressure on grantees to modify their priorities.

THE PROGRAM OFFICER PERSPECTIVE



JUSTIN LAING

CEP: What have you learned during your time as a program officer that has changed the way you form or maintain relationships with your grantees?

Laing: I’m trying to be more comfortable just in terms of my own speaking voice. One thing I struggled with when I got here was just trusting myself and not feeling I’ve got to be some kind of philanthropoid. So style of speech is harder for me. My default is one that whites may hear as more of a black style. One thing I’m becoming more comfortable with now is talking in my regular voice. Philanthropy language is a real obstacle to being clear. If you’re not clear, it creates a whole other level of that power dynamic. I try to speak in a style that is natural to me and one that, hopefully, grantees can relate to.

I’ve also stopped wearing a tie, and I am fortunate enough to work for an organization that allows that kind of flexibility. I work with small arts grantees, who tend to dress casually. So what am I trying to communicate when I wear a tie? I’m getting more conscious about those power dynamics. This is a simple tactic that helps me feel comfortable being myself in what is a powerful position. Hopefully if I have this kind of comfort, the person I am talking to will have a similar comfort, and the conversation we are having will be a more authentic one. →

JUSTIN LAING, *continued*

In terms of other things I've learned, I'm more conscious that you can't totally put the power dynamics away. Having been a grantee, when I first got here, I really wanted to believe that I could just forget it – I could make it nonexistent. But you can't because there really is a big power difference. The main thing for me is being more conscious about the power pieces, and then trying to be comfortable in my own skin.

THE PROGRAM OFFICER PERSPECTIVE



NICOLE GRAY

CEP: *What have you learned during your time as a program officer that has changed the way you form or maintain relationships with your grantees?*

Gray: It is striking to me, and it's been a big learning experience, that so much of the work is about relationships. Work is done by people, and institutions are made up of people. So you can have lots of abstract ideas or intellectual understandings of how you think change happens in the world, or what levers to pull, and this theory of change, and all of that. And that's all important, but you have to be able to act on your ideas, and people are the ones who act on ideas.

Strengthening Organizations and Funded Work

Ratings of helpfulness of the selection process in strengthening the grantee organization or its work are a strong predictor of ratings on the Relationships Measure. When grantees experience a selection process that is not helpful, it can have negative repercussions on the relationship – especially if the process involves what they see as wasted time. “Don't ask an organization to spend months on proposals for something for which [the foundation] has no intention of funding,” says one grantee.

Grantees resent processes that cause unnecessary stress for their organizations or convey a lack of respect for the challenges they face. “Be more approachable” during the selection process, writes one grantee. “Avoid being hostile or insulting in dealing with grantees, which makes grantees reluctant to contact the foundation for advice or guidance.”

The high-performing program officers we interviewed put concerted effort into making the selection process helpful for both grantees and the foundation. Kabel describes how he interacts with grantees during the selection process. “We host a grantee forum where we invite anybody who is interested in applying for a particular program to learn about what the program is designed to achieve and what we're hoping to see in competitive proposals. We also answer questions they have that are relevant to their particular programs or initiatives.” He continues, “I'd say almost all of our grantees probably already know how they fit into our program's goals and strategies by the time they get a grant from us.”

Pressure to Modify Priorities

Ratings of the pressure grantees feel to modify their priorities in order to receive a grant are also an important contributor to results on the Relationships Measure. Funders that are seen to apply too much pressure to grantees to modify their proposals can set the stage for a relationship that is strained – and less than candid.

“Keep in mind the goals of the specific grant, rather than the foundation's desire to market itself,” says one grantee. “Do not always think [you] know the best method to achieve shared or common goals,” says another. “Have a way for [giving] input without fear of shutting down communication and relationships.”

The high-performing program officers possess a high degree of awareness of the power dynamic between the funder and the funded. “I'm always conscious of it,” says Seeley. “I think that's why, in some ways, I bend over backwards not to be arrogant because I think it's one of the biggest pitfalls in the field, and I don't think that it is at all fitting for a community foundation to come across that way. I try to be a really respectful listener.”

Justin Laing of The Heinz Endowments recognizes the power dynamics inherent in the foundation-grantee relationship and works to be open with grantees. “Rather than trying to rustle them into doing something, you’ve got to say, “This is what we think,”” says Laing. ““You have the right to do it your way, but if it doesn’t work out consistently, then we have the right to say, we’re not going to do this.””

Grantees who feel their organization or work is strengthened through the proposal and selection process and who do not feel pressure to modify their priorities in order to receive funding have better relationships with their funders. For grantees, first impressions count – and the selection process is often where those impressions are developed.

FINDING:

Foundation staffs’ expertise in the communities and fields in which they fund is the third key to high performance on the Relationships Measure.

WHETHER THEIR FOCUS IS at the field or community level, it is crucial that foundation staff bring relevant expertise to their relationships with their grantees. In our past research, we have described how important a foundation’s “external orientation and expertise” is to grantees.⁹ Grantees understand that foundation program officers are in a unique position to access, develop, and communicate information. They want program officers to develop expertise – and to apply it in their work.

THE PROGRAM OFFICER PERSPECTIVE



WENDY LISCOW

CEP: *What have you learned during your time as a program officer that has changed the way you form or maintain relationships with your grantees?*

Liscow: I think a critical moment is when you realize how important your funding is to an organization. It’s a big responsibility. And it requires you to do a lot of homework and be very thorough. We spend a lot of time with potential grantees, including those we think we could ultimately decline. People might look at us and think we’re insane, but if we’re going to decline someone, we probably spend more time with them because we never really want them to think, “Well, Dodge didn’t understand us. That’s why they didn’t fund us.” We want them to walk away, and say, “OK, if we’re not getting funding from Dodge, it’s because there’s not a match between our mission and their mission.”

And so I’ve learned how important it is to go that extra mile and show respect to them, that I’ve done my homework. We’re not going to just spend our time talking at our site visit about what they said in their proposal and report, we’re going to talk about what matters to them. What I’ve learned is that through doing that sort of work, you can get so much deeper into what really motivates people, and what they care about in their work.

⁹ Kevin Bolduc, Phil Buchanan, and Judy Huang. *Listening to Grantees: What Nonprofits Value in Their Foundation Funders*. Center for Effective Philanthropy (April 2004).

THE PROGRAM OFFICER PERSPECTIVE



CHRIS KABEL

CEP: *What have you learned during your time as a program officer that has changed the way you form or maintain relationships with your grantees?*

Kabel: There hasn't been one lightning bolt "ah ha!" moment. It's more a series of gradual learnings. The importance of actually getting out of the office and meeting grantees where they are doing their work is something that I've grown to appreciate more and more. It's something that frankly I wish I could do more often than I'm able to do. Being able to meet grantees and see what they're doing demonstrates that you care about what they're doing. You understand where they're coming from. You're not just sitting back in your office and reading a report once every six months. It's enough of a priority to carve a couple hours out of your afternoon or morning to drive out and actually see them in action. That's number one. And then, number two – working side-by-side with them to help them achieve their objectives, whether they're policy objectives or other types of systemic change that they're trying to drive. Again, it gives a shot in the arm or a boost of confidence that we are there to support them in ways that go beyond the grant dollars.

Understanding of Communities

When grantees sense that foundation staff do not have knowledge relevant to the communities in which they work, they express their concerns – frequently describing a worry that opportunities for impact are being squandered. “The foundation should get better acquainted with the local situation,” writes one grantee, “so that funding responds to the realistic issues on the ground.”

Another grantee says, “They need to go out and talk to people like they did when they first started. They actually would travel to all parts of [this state] and ask people what the needs are. Currently, it feels as though the foundation is only listening to a limited group who are not in touch with the struggles of everyday people.”

The high-performing program officers we interviewed are proactive about building their knowledge. “It really means continuing to be curious and ask as many questions as possible,” says Seeley. “It's getting out in the neighborhood and listening.”

Seeley recognizes that understanding the communities in which she is working is an ongoing process. “As a foundation, we recently made a commitment to work long-term in a neighborhood. There's just so much history in the neighborhood and so many dynamics. I think I'm going to constantly be learning about that community: about what's needed and about what people are trying, about what's working and what's not working, and about what has been tried in the past.”

Understanding of Fields

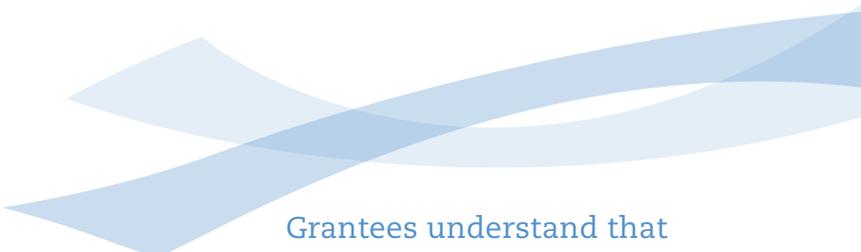
When ratings of understanding of the field are low, grantees' concerns range from the relevance of the foundation's goals to questioning whether their strategies are well enough informed by the facts on the ground. “I think the foundation was correct in having one of their focus areas be on children [of specific ages],” writes one grantee. “However, I am not sure they have always understood the realities of working with this age group. The foundation encourages and supports year-long programming for this age group, but the reality is that in low-income communities it's hard to retain youth for that long.”

For the high-performing program officers, developing and maintaining their expertise is challenging – requiring significant time, effort, and resources. “One of the things that we try to do is synthesize information from two different directions,” says Kabel. “One would be the nationally published and researched data about what sorts of interventions or initiatives are most effective. The other direction is in the community, so it’s community readiness to engage on a particular issue. When you have that sort of sweet spot between the community readiness to mobilize on an issue, plus validation from the research base that such an initiative is actually likely to have the intended impact, then that’s where we can play a role as funder.”

Nicole Gray of the William and Flora Hewlett Foundation describes her approach to developing and maintaining the requisite expertise to be successful in her work. “We talk to other funders about what grantees are doing. We talk to other experts who may or may not be on the grantee side of things; they may just be expert observers in the field. Sometimes we commission surveys of the landscape of a certain area.”

Laing explains how the development of expertise contributes to stronger relationships with his grantees. “In the arts, the more that you understand someone’s art form, the more they will open up to you. Because that’s what really inspires them.”

Expertise about the fields and communities in which grantees work is crucial to successful foundation-grantee relationships. This expertise allows foundation staff a unique perspective that can benefit those they fund. “Sometimes we can see problems before they see them,” Liscow says.



Grantees understand that foundation program officers are in a unique position to access, develop, and communicate information. They want program officers to develop expertise – and to apply it in their work.

FINDING: The final key to strong relationships is the initiation, and frequency, of communications between grantees and foundations.

THE FIRST THREE ASPECTS of strong relationships we have described relate to the quality of the communications and interactions between grantees and foundations – and our analysis indicates that quality trumps quantity. But quantity still matters. The final predictor of ratings on the Relationships Measure relates to the initiation, and frequency, of interactions and communications.

Those grantees who have contact with their foundation more than once a year – and are not most often in the position of initiating communication – rate their funders higher on the Relationships Measure. In our dataset, 23 percent of grantees report having contact with their funder only once a year or less, and 35 percent say they are the ones most frequently reaching out for contact.¹⁰

Our data do not indicate that constant contact is needed or even desired by grantees. But relationships suffer when contact only occurs once a year or less frequently.¹¹ “Additional dialogue during the funding cycle would be helpful,” says one grantee. “Perhaps two to three conversations during the year or one visit to the foundation office.”

Grantees are often unsure how much interaction a foundation is willing to have – and can feel unclear about expectations. “We nonprofits walk the line of pushing too much for interaction but sometimes not asking for it often enough,” says one grantee. It helps, she continues, when foundations are clear on “when and how often they’re able to interact with us.”



Twenty-three percent of grantees report having contact with their funder only once a year or less, and 35 percent say they are the ones most frequently reaching out for contact.

¹⁰ In our survey, grantees were asked, “How often do/did you have contact with your program officer during this grant?” Response options included weekly or more often; a few times a month; monthly; once every few months; and yearly or less often. They were also asked the question, “Who most frequently initiated the contact you had with your program officer during this grant?” Response options included most frequently initiated by your program officer; most frequently initiated by you; initiated with equal frequency by your program officer and you; and don’t know.

¹¹ There is a weak statistical relationship between length of grant and frequency of contact: Grantees reporting contact with the foundation yearly or less often are slightly more likely to have a one-year grant than a multi-year grant.

Grantees do not perceive their relationships with foundations to be as strong when they are the ones initiating most of the contact. “Communicate,” requests one grantee. “Communication was limited to that which we initiated. We were not notified of staff changes, including changes of program officer. When we attempted to contact the program officer, [the program officer’s] assistant acted as a ‘screen’ to access. This was degrading and, at times, humiliating.”

The value of initiating contact with grantees, and doing so with a frequency that is appropriate to the needs of a particular organization and grant, is clear to the program officers we identified as among the highest performing. Seventy-five percent of Kabel’s grantees said that he contacts them as much as they contact him. He believes that this contact is essential for developing his understanding of what his grantees are trying to achieve and how. “I see a lot of them on a regular basis in a lot of different venues,” says Kabel. “I was at a lunch that was designed to launch an initiative, which we fund. There were at least five different grantee organizations in that room, and I know all of them. I know what their missions are. I know what their strengths are as well as their opportunities for improvement. And I just know that because I’ve been talking to them for five years.”

Kabel describes how this contact improves his understanding of what is really going on with his grantees. “We’ve moved beyond the point where every organization feels like they need to present the rosiest possible scenario and the most polished description of what they’re doing and can actually talk to me honestly about some challenges that they’re having, as well as how they might overcome those challenges and become stronger as organizations.”

THE PROGRAM OFFICER PERSPECTIVE



TARA SEELEY

CEP: *What have you learned during your time as a program officer that has changed the way you form or maintain relationships with your grantees?*

Seeley: I have a phrase that I use with myself a lot, which is, “In all events, the grant shouldn’t do any harm.” In other words, you don’t want to make a grant for something where you don’t think the organization can sustain the work or they don’t yet know enough to implement that particular program. You don’t want to set them up for failure.

So, it’s that willingness to, when appropriate, slow things down and take another look and think through the grant together with the executive director. I think that’s just key. That’s where my understanding of the relationship has matured over time. There are organizations where it really is a partnership. It’s not just the foundation writes a check and the organization implements the program. You hope that it’s a partnership where we’re all learning from what the organization is doing.

Sixty-two percent of Gray’s grantees report being in contact with her at least every few months, and 21 percent have contact with her on a monthly basis. More than 70 percent of her grantees report that she reaches out to them as frequently as they reach out to her. “When I talk to grantees, I say that I’m really interested in their organization programmatically, and what’s happening organizationally, and that I have a very high tolerance for information and emails and all sorts of things. So I always welcome getting more from them and hearing from them and seeing them,” she says.

Expectations for a program officer’s contact with grantees have to be interpreted in the context of other demands placed on program officers and in light of the number of relationships they are asked to manage.¹² Yet the high-performers we profiled often manage dozens of relationships while initiating contact with their grantees with appropriate frequency.

OUT OF SIGHT, OUT OF MIND: THE CHALLENGE OF GEOGRAPHY

OUR DATA INDICATES THAT FOUNDATIONS with a larger geographic focus seem to face more challenges in forming strong relationships with their grantees. These foundations tend to be rated lower on the Relationships Measure. But geographic focus is not a prerequisite for doing well: There are national and international foundations rated by grantees as having strong relationships.

When we segment results at the program officer level, we see many program officers at these foundations among the very highest rated. So, while a broader geographic focus makes establishing relationships tougher, it is not an insurmountable challenge.

Nicole Gray has a portfolio of international grantees. She goes on site visits overseas, which she finds very helpful for getting to know her grantee organizations. “Since we don’t fund projects, we’re not necessarily going to see what’s happening at a particular clinic in Kenya,” she says, “but

we are going to see what’s going on with the organization. Because we provide general operating support, we talk about programmatic things, and we also talk about infrastructure and organizational issues. And so you get to talk to different people in the organization, not just the CEO.”

Even regionally focused foundations face geographic challenges. Chris Kabel says, “There are some organizations where I feel I pretty much know them inside and out. There are others where I don’t have as much interaction with them, and I guess part of this is geography. We’re based in Portland. Our grantmaking region is the entire state of Oregon and southwest Washington, and I’d say we have less interaction with the grantees that are in more rural areas. So I don’t have as good a feel for what they’re going through on a month-to-month basis, aside from getting the regular six-month progress reports.”

¹² Our analyses show that as the average number of active grants at a foundation increases, the percentage of its grantees who report more than yearly contact decreases. We do not possess individual-level data on the number of active grants for each program officer in our dataset.



Conclusion

There are four basics that foundations and program officers must work to achieve if they are to forge strong relationships with grantees.

- » **Understanding:** Understanding of funded organizations' goals and strategies
- » **Selection:** Helpfulness of selection process and mitigation of pressure to modify priorities
- » **Expertise:** Understanding of fields and communities
- » **Contact:** Initiation of contact with appropriate frequency

As our interviews with high-performing program officers demonstrate, there are many different ways in which program officers can excel on the Relationships Measure. By profiling these program officers, we are not suggesting that others emulate every facet of their approaches. Instead, we hope their examples serve to spur reflection about what it takes to succeed in developing strong relationships with grantees and the variety of ways in which that can happen.

It is important to remember that program officers cannot succeed alone. They need adequate support and resources. Much of what we know to be important to doing well – such as the development of expertise or the initiation of contact – can be affected by decisions beyond the program officer's control: the level of foundation support for professional development; the number of relationships they are asked to manage; and the degree of agreement within the foundation about goals and strategy.

But our analyses of our grantee survey dataset and our experience presenting Grantee Perception Reports® (GPRs) to more than 200 foundations tells us that there is important variation in grantees' experience that is based on which program officer they are assigned.¹³ Understanding what it takes to support individual program officers in their quest to form strong relationships with grantees is important as foundation leaders seek to become more effective in their work.

Many foundation leaders have pointed out since we began our large-scale grantee surveys that

¹³ The Grantee Perception Report® is an assessment tool providing comparative data to foundations based on grantee perceptions.

grantee perceptions do not equate with foundation effectiveness or impact. We could not agree more. Grantee survey data should be viewed by foundations in the context of strategies to achieve impact. Wallace Foundation President Christine DeVita explains it this way:

Because foundations like ours can only achieve their missions through the work of others, it is important that we have strong and effective partnerships with all our grantees: the organizations we fund to try our innovative solutions to important social issues; the researchers we commission to contribute to

*the field's knowledge and to help evaluate what's working; and our communication partners, whose efforts are crucial in getting both issues and solutions before policymakers, practitioners, and thought leaders.*¹⁴

Grantmaking foundations rely on their grantees to achieve their impact goals. Strengthening relationships between foundations and grantees is, therefore, an important element of foundation effectiveness. We hope this research provides foundation leaders and program officers with practical insights to help them succeed in this effort.

REFLECTING ON YOUR OWN RELATIONSHIPS WITH GRANTEES

SOME OF WHAT OUR ANALYSIS INDICATES it takes to have strong relationships with grantees may seem basic. But, as in any kind of relationship, the keys to getting it right are more difficult in practice than they are in theory.

Consider the following questions, either on your own or in conversation with your colleagues:

- » Thinking about the nonprofits you fund, how well do you understand their goals and strategies?
 - How do you gain that understanding?
 - What would allow you to understand these organizations better?
- » How do you think your work with grantees during the selection process helps or hinders their organizations or work?
 - Do you view the selection process as an opportunity to help strengthen grantees' organizations and their work?
- » Are you aware of when you are pressuring grantees to modify their priorities in order to receive funding?
 - Is the power dynamic between funders and grantees something you are cognizant of when interacting with grantees? Is it ever discussed at your foundation?
- » How well do you understand the communities or fields of the grantees with which you work?
 - How could you update or improve your field or community expertise?
 - How could you use this expertise to benefit both grantees and the foundation in their efforts?
- » What determines how often you are in contact with grantees?
 - Does the level of contact you have with each grantee make sense given the particular grantee organization, goals of that grant, and the role that you, as the program officer, play for that grant?
- » Do you recognize whether your grantees are reaching out to you more than you are reaching out to them?
 - For what reasons, or in what situations, might it be important for you to initiate more contact with your grantees?

¹⁴ Ross, Judith A. *Lessons from the Field: Aiming for Excellence at the Wallace Foundation*. Center for Effective Philanthropy (June 2008): 13.

Appendix: Methodology

Survey of Grantees

The grantee data discussed in this report were gathered through confidential surveys administered between spring 2005 and fall 2009.

SAMPLE

In total, 43,269 grantees were invited to participate in CEP's grantee survey and 29,071 grantees of 175 foundations responded, resulting in a 67 percent response rate. Of those respondents, CEP has data for all items comprising the Relationships Measure for 25,749 grantees. Of the 175 foundations represented in this sample, 149 foundations opted into the survey process and received Grantee Perception Reports® (an assessment tool providing comparative data on grantee perceptions), and 26 private foundations were selected randomly to create a more representative sample of large foundations in the United States.

METHOD

Grantees responded to 63 survey items in total, many of which were rated on seven-point Likert rating scales; other items contained categorical response options. The survey also included three open-ended items. Grantees were given the option to respond to the survey by mail or online and were given the option to respond anonymously. The survey questions explored dimensions of foundation performance ranging from responsiveness of staff to perceptions of foundation impact on the grantee organization, local community, and field. In addition, the survey sought data from grantees about the frequency of interactions, the proposal creation and reporting and evaluation processes, and a range of other issues.

QUANTITATIVE ANALYSES

To analyze the data, a combination of t-tests, chi-square analyses, correlations, analyses of variance, and regression analyses was used. An alpha level of 0.05 was used to determine statistical significance.

Factor analysis was used to understand which items in the grantee survey were measuring similar underlying constructs.¹⁵

Five survey items, as shown in Figure 1, were shown to be measuring one underlying construct, which we have named the Relationships Measure. For each grantee in our survey, responses to these five survey items were averaged to create a score on the Relationships Measure. The Relationships Measure was used as the dependent variable in the regression analysis described in this report.

A series of OLS regressions were performed on the Relationships Measure. Given that the distribution of scores on the Relationships Measure did not form a normal distribution, a series of robust MM regressions were also performed.¹⁶ The robust MM regressions confirmed the findings of the OLS regressions; therefore, OLS regression findings are presented in this report. The R² for this OLS regression was 51 percent. In descending order, the standardized beta coefficients for each independent variable are as follows:

- » Understanding of grantees' goals and strategies = 0.34
- » Helpfulness of the selection process = 0.20
- » Pressure felt by grantee to modify priorities in proposal = -0.19
- » Understanding of the community = 0.14
- » Understanding of the field = 0.12
- » Initiation of contact primarily by grantee = -0.06
- » Yearly or less frequent contact = -0.05

QUALITATIVE ANALYSES

Between fall 2005 and fall 2009, 9,632 grantee suggestions for improvement in foundations' services or processes that would make them better funders were provided in response to open-ended items in the grantee survey.

A coding scheme was developed to capture the wide range of themes in response to this question. Using that coding scheme, a team of CEP staff members who achieved 80 percent inter-rater agreement coded all responses.

¹⁵ Factor analysis was conducted using oblique rotation and maximum likelihood estimation.

¹⁶ Robust regression is a type of regression analysis that takes into account influential outliers and heteroskedasticity in a dataset.

Profiles of Program Officers

To highlight practices from program officers rated as doing well on the Relationships Measure, interviews with five program officers were conducted. The program officers profiled in this report are meant to serve as examples. Quotations from their interviews appear throughout the report. No systematic analysis was conducted on the responses from these interviews, as the purpose of these interviews was to profile the approaches of five program officers who are high performers.

In CEP's grantee survey, foundations have the option to ask grantees to identify their primary contact. On the basis of this question, the dataset contains grantee survey data that can be segmented for 266 primary contacts of 32 foundations.¹⁷

A Relationships Measure score was created for each grantee in our dataset. Each primary contact then received an average score of their grantees' ratings on the Relationships Measure. Only primary contacts with at least 10 grantee respondents to the items comprising the Relationships Measure received an average score. The top 20 percent of primary contacts according to these average scores were identified. Within this 20 percent, which consisted of 53 primary contacts, we removed those with the titles of Trustee, Executive Director, President, or CEO, as well as those who had left their positions since the time of the survey. We also removed primary contacts at foundations that had participated in the survey so recently that they had yet to receive their results. From the resulting group of 28, we randomly selected five program officers, stratifying the selection to ensure that a program officer from a community foundation and a program officer from a health conversion foundation would be among those interviewed.¹⁸

All interviews were conducted via phone and lasted one hour. All interviews were recorded and transcribed. All program officers reviewed, and agreed to publicly share, their responses in this report.

¹⁷ These 32 foundations surveyed their grantees between spring 2006 and fall 2009. Spring 2006 was chosen as the starting point for the creation of this dataset to increase the likelihood that program staff still work at the same foundation, as well as to ensure that not too many years would have elapsed since their grantees were surveyed.

¹⁸ Of the five we initially identified, one did not accept the invitation to be interviewed and one did not reply to the invitation. We randomly selected two additional program officers to invite so we would have five to interview.

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