

# Grantee Perception Report® (GPR) Subscriber Assessment Survey: Results Brief

## Purpose, Methods, and Overview

This brief highlights key findings from the tenth Grantee Perception Report® (GPR) Subscriber Assessment survey conducted by Learning for Action (LFA), an independent research, evaluation, and strategy firm, on behalf of the Center for Effective Philanthropy (CEP).

To conduct the 2015 assessment, LFA deployed an online survey to GPR subscriber foundations. LFA compared the 2015 survey results with data from nine previous GPR assessments (conducted between July 2005 and July 2014) for this analysis.

This brief highlights funder reflections on, and overall satisfaction with, the GPR tool and process, the perceived value of the GPR, and changes inspired by the GPR across three funder cohorts grouped for the purposes of analysis as follows: 2005-2012, 2014, and 2015. The brief also highlights select findings comparing results for first-time and repeat GPR subscribers for the three cohorts. The full set of results from the cross-cohort analysis and first-time versus repeat subscriber analysis is included at the end of this brief.

### About the 2015 Survey Response Rate and Sample<sup>1</sup>

- **25 of 43** funders (58%) using the GPR between February 2014 and February 2015 responded to the 2015 GPR Subscriber Assessment survey.
- Of the 25 subscribers included in this assessment, **ten** were **first-time users** and **fifteen** were **repeat users**.
- **28%** of 2015 respondents identified as CEO/Executive Director; **16%** identified as Director of Research/Evaluation; **12%** as Vice President for Programs; **4%** as Vice President of Communications; and **40%** of respondents had some other position in their foundation.
- **93%** of 2015 repeat-subscriber respondents were the foundation's primary contact with CEP during previous rounds of the GPR process.

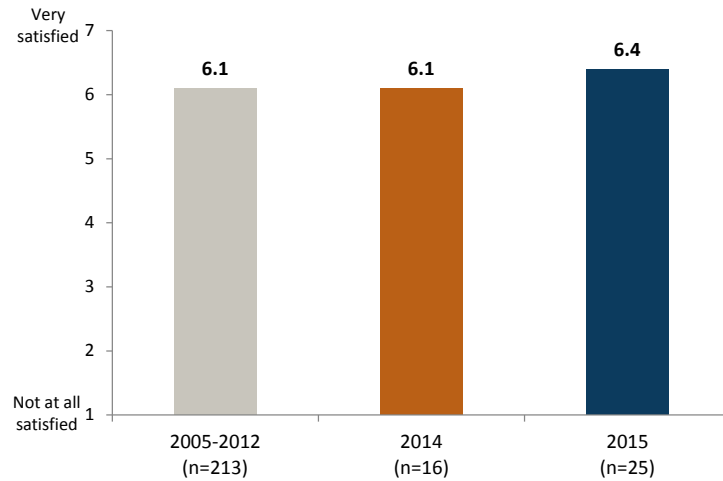
<sup>1</sup>2015 responses are based on data from 25 subscribers who completed the GPR Subscriber Assessment Survey. All percentages are based on this response rate.

## Result Highlights

### Overall Satisfaction with the GPR Experience

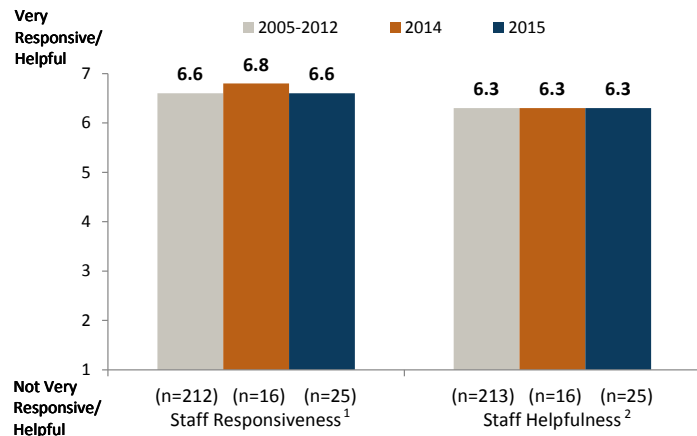
- 2015 respondents reported high satisfaction with the GPR experience overall.** On average, 2015 respondents rated their experiences as a 6.4 on a 7-point scale (see Exhibit 1), an increase above the overall rating of both the 2005-2012 and 2014 cohorts. While the increase in overall satisfaction is not statistically significant, results indicate that subscribers' experience with the GPR remains high and may be on the rise.
- Subscriber interactions with CEP staff continue to be a highly valued aspect of the GPR experience.** Subscriber ratings of staff responsiveness dropped slightly from 6.8 in 2014 to 6.6 in 2015, but this change is not statistically significant (see Exhibit 2). Ratings of CEP staff helpfulness remain high and unchanged over time, at 6.3 for all cohorts.
- GPR user responses show a steady increase in the extent to which CEP's work reflected a clear understanding of the specific organizational context of their foundations,** from 5.3 in 2005-2012 to 5.8 in 2015. Repeat subscribers report higher ratings than first-time users at all time points, indicating that CEP's understanding of the unique organizational context grows over time—a value-add of repeat GPR usage that CEP may want to highlight.

**Exhibit 1. Overall Satisfaction with the GPR Experience<sup>†</sup>**



<sup>†</sup> No pairwise comparisons were statistically significant.

**Exhibit 2. Satisfaction with CEP Staff<sup>†</sup>**



<sup>1</sup> Scale: 1 = "Not at all responsive" to 7 = "Very responsive"

<sup>2</sup> Scale: 2 = "Not at all helpful" to 7 = "Very helpful"

<sup>†</sup> No pairwise comparisons were statistically significant.

- Subscribers indicate that the organizational, contextual, and for repeat subscribers, historical knowledge that CEP staff bring to the GPR process is "invaluable." Additionally, subscribers value CEP staff's ability to provide context for GPR results that help foundations understand their roles and impact in their communities, which helps to inform ongoing strategy.

- Overall ratings of the quality of CEP’s in-person presentation experienced a drop in 2015. While ratings of in-person presentations showed an increase from 6.2 in 2005-2012 to 6.5 in 2014, 2015 ratings dropped to 5.9. While this drop was not statistically significant, it may be an area for CEP to explore further. Since data shows that 2015 repeat users report higher ratings (6.0) than first-time users (5.7), CEP may want to keep in mind factors that may lead to enhanced experience for repeat users and could be implemented with first-time users.
- Despite subscribers’ overall positive experience, some subscribers reported a gap in the ability of the GPR to take into account unique organizational contexts (such as staffing philosophy). One respondent indicated that recommendations made by CEP staff during the GPR design process, such as targeting specific respondents, limited the range and scope responses received, which the subscriber felt to some extent limited the relevance and usefulness of the data collected. Another subscriber reported that the CEP recommendation to collapse several types of grantees into the same analysis constrained their ability to understand the responses of various types of grantees and the differences among them.
- Additionally, while many subscribers reported the comparative data received through the GPR process was “extremely valuable,” several other respondents noted limitations in how relevant they felt the group of organizations in their comparison dataset was, making it challenging for them to use those comparative results for contextualization and benchmarking of their GPR findings.

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The most important impact of the GPR is to **change our culture by making our staff better aware** of the effect of our [processes and strategies] on our grantseekers and grantees.

The independence of CEP and their ability to benchmark our foundation against others has given us a **stronger, more reliable perspective of our work.**

Grantee Perception Report (GPR) Subscribers

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## Recommending the GPR and Intent to Repeat

A subscriber's intent to re-commission the GPR and to recommend it to a colleague foundation are strong indicators of overall satisfaction. Results from the 2015 survey on both of these indicators show that GPR subscribers continue to be highly satisfied with their overall experience.

- All (100%) of 2015 respondents – both first-time and repeat subscribers – indicated that they would recommend the GPR, or recommend recommissioning the GPR, to a colleague.** Respondents value the GPR for its usefulness in documenting change over time for their organizations individually, in addition to its usefulness in providing benchmarking data to assist the foundation in locating its position in the field. Subscribers utilize longitudinal and benchmarking data to help inform foundation strategy and find it helpful to embed these processes within their organizational cultures.
- One respondent reported that the GPR can be particularly useful when a foundation undergoes organizational shifts (in leadership, staffing, or strategy, for example), as repeat data can illuminate outcomes related to such shifts.
- Eighty percent of 2015 respondents intend to re-commission the GPR, within a 3-year timeframe on average** (see Exhibit 3). This percentage has remained steady since the last time the GPR was commissioned in 2014. Intent to recommission has increased from the 2005-2012 cohort, but the increases shown in the 2014 and 2015 cohorts were not statistically significant.
- Intent to recommission the GPR was slightly lower among first-time users (70%) than repeat users (87%) in 2015. This is a consistent trend, with **repeat users at all time points reporting higher rates of intent to recommission than first-time users.** Those who repeat the GPR highly value having GPR results at more than one point in time.

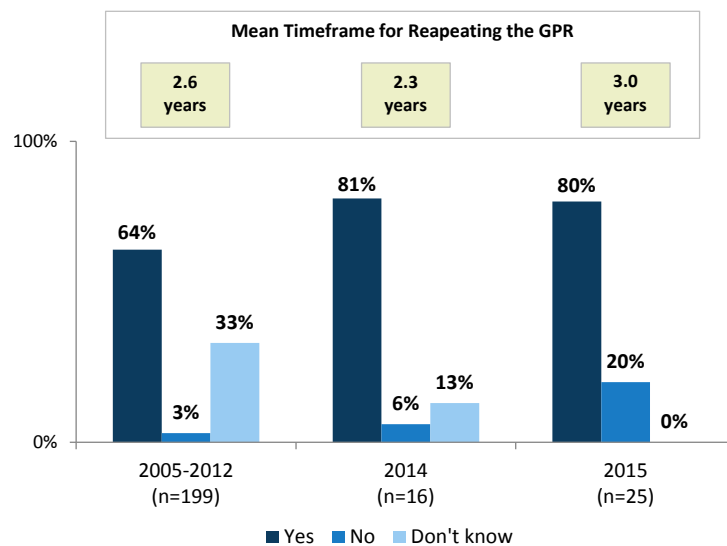
The GPR is a snapshot in time. Multiple snapshots allow you to see areas of growth, decline and stability/stagnation. **You learn more about yourself as an organization with multiple snapshots.**

The repeat GPR [can be helpful] if a foundation has a major change in leadership, staff, or grant strategy between one survey and the next.

We have found that the first GPR was difficult to use because we couldn't tell whether or not our changes would be enough to change grantees' perceptions. **Repeating the GPR showed us which perceptions were changing, and which ones were not. That was extremely valuable, and we have recommended it to others for that reason.**

Grantee Perception Report (GPR) Subscribers

**Exhibit 3. Intent to Re-commission the GPR<sup>†</sup>**



<sup>†</sup> No pairwise comparisons were statistically significant.

- **2015 responses to the GPR subscriber assessment show an increase in intent *not* to recommission the GPR.** Whereas previous cohorts report a greater amount of uncertainty about recommissioning the GPR, no users (0%) reported uncertainty about recommissioning, and 20% reported that they did not intend to recommission the GPR. While intent to recommission has remained high at 80%, the more decisive responses indicating that users will not recommission may be an area of interest for further exploration by CEP.

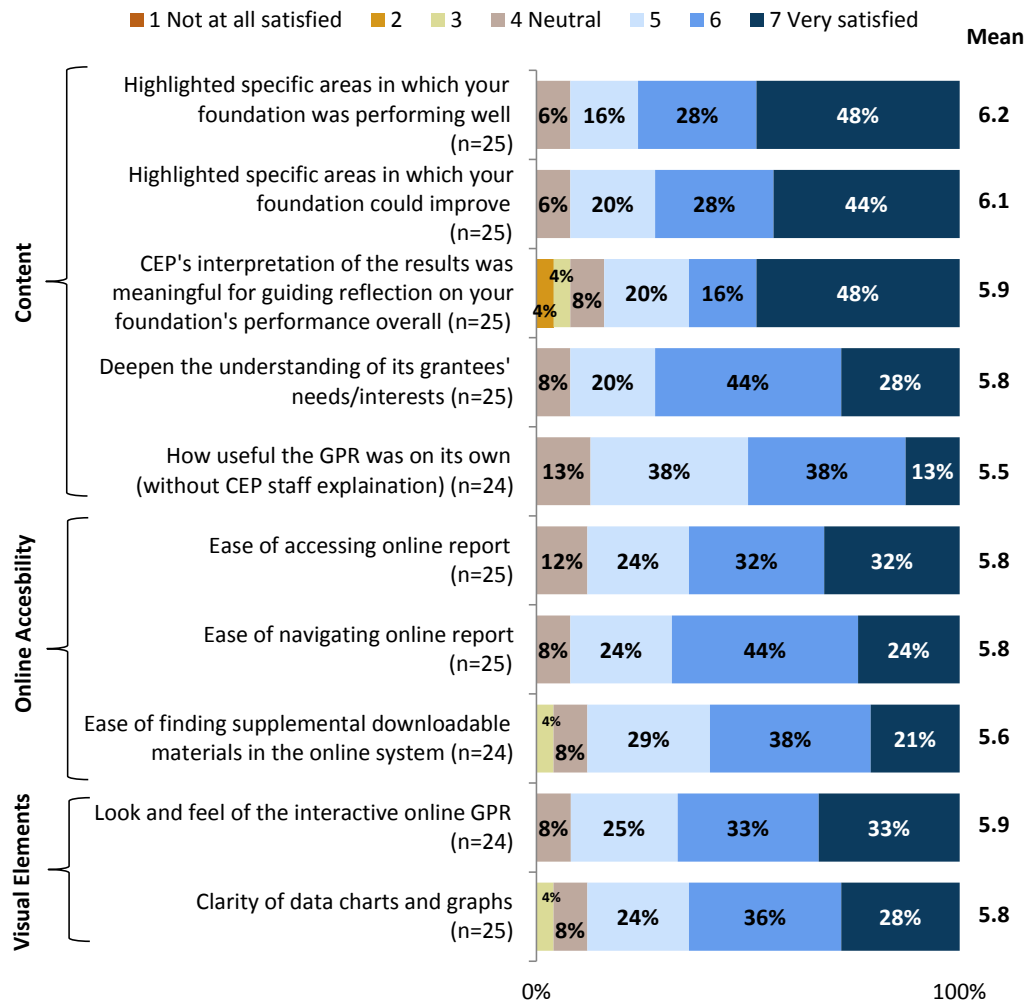
## Interest in a New GPR Subscription Model

- **Approximately one-fifth of 2015 GPR first-time and repeat users would be interested** in a new subscription model that would include receiving more frequent ongoing grantee feedback.
- **Twenty percent of first-time users and 38% of repeat users indicated they would not be interested** in a new GPR model that provided more frequent grantee feedback.
- **Approximately half** (60% of first-time users and 43% of repeat users) **indicated that they would need more information** before making a decision about a new subscription model.

## Satisfaction with the GPR Report, Services, and Features

2015 subscribers reported their satisfaction with, and the helpfulness of, various aspects of the GPR report, services, and features.

**Exhibit 4. Satisfaction with Aspects of GPR Report**  
2015 Survey Data<sup>1</sup>



<sup>1</sup> The sum of the percentages may be more or less than 100% due to rounding.

- 2015 respondents were generally satisfied or very satisfied with all aspects of the GPR report – especially the content highlighted in the report (see Exhibit 4).** Approximately 75% of respondents gave a rating of 6 or higher to the content in the report that highlighted specific areas of strong performance or areas of improvement. Nearly 75% of respondents gave a 6+ rating to the ability of the GPR to deepen the foundation's understanding of its grantees' needs and interests. More than half of respondents (60%) were also satisfied with CEP's interpretations of the results; however, two respondents (8%) had an unsatisfactory experience with CEP's interpretations of the results, and one reported a neutral rating of this aspect of the GPR.

- **Two areas of the GPR experienced statistically significant gains from the 2005-2012 cohort to the 2015 cohort**, including: the usefulness of the GPR on its own without CEP staff explanation (from 4.9 in the 2005-2012 cohort to 5.5 in 2015); and the clarity of data charts and graphs (from 5.2 to 5.8) ( $p < .05$ ). This is a significant “win” for CEP to have achieved given how challenging it is to convey complex survey results to a lay audience.
- **GPR subscribers continue to rate highly the interactive online features of the GPR**, with 80% or more reporting ratings of 6 or higher on the interactive online report and the ability to toggle results by cohorts of funders and different subgroups of data. Seventy-eight percent (78%) of respondents gave a 6+ rating for segmentation of the data by program officer, but 14% reported this aspect as minimally helpful.
- **GPR users cite the customizable and comparative capabilities of the online interactive tool to be highly valuable** for developing a thorough grasp of GPR results. Repeat users report this new feature as a definite value-add to the features available in previous years.
- **Despite the high level of satisfaction with the GPR’s online functionality, some subscribers may not be using the online options to their fullest potential.** Those who utilized the PDF version of the report more frequently said it was easier to share with staff and board members than the online report, and helped focus conversations so that stakeholders were not overwhelmed by the extent and complexity of data. GPR subscribers may benefit from enhanced guidance and technical assistance from CEP in the expanded options available via the online interactive portal.
- **2015 repeat users report using the online report three times as frequently as first-time users.** This finding may be related to repeat users’ greater familiarity with the reports, which likely leads to increased comfort level with using online functionality such as toggles to dig deeper into the data. CEP may want to consider providing more substantive orientation or post-reporting follow-up for first-time users to build comfort with the enhanced online usability, which may ultimately lead to increased value of the GPR and intent to recommission among first-time users.

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The online report was **very helpful in being able to play with and toggle information in real time**. Especially useful when **discussing data and findings with teams** as it enabled them to **really get into the findings**.

The online report was **much easier to navigate to the specific question** I wanted to review. It also **allowed me to customize by view of the data**.

Grantee Perception Report (GPR) Subscribers

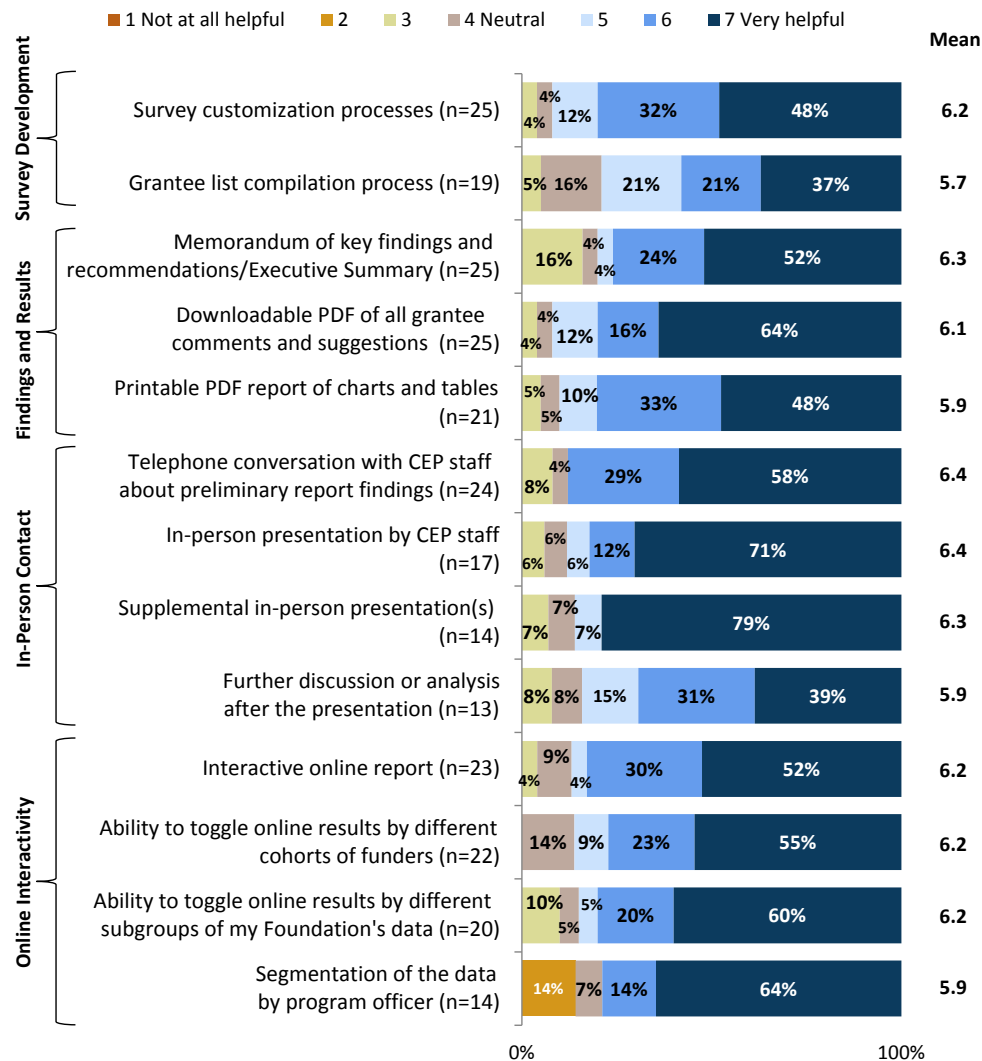
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## Helpfulness of the GPR Report, Services, and Features

- 2015 respondents reported very high ratings on the helpfulness of GPR services and features** (see Exhibit 5). Nearly all aspects of the GPR were rated at least a 6 on the 7-point scale, on average. In particular, a high proportion of respondents found in-person presentations by CEP staff and supplemental in-person presentations to be “very helpful.” Additionally, respondents rated other features, such as the downloadable PDF of all grantee comments and suggestions and segmentation of the data by program officer to be “very helpful”.

**Exhibit 5. Helpfulness of GPR Services and Features**  
2015 Survey Data<sup>1</sup>



<sup>1</sup> The sum of the percentages may be more or less than 100% due to rounding.

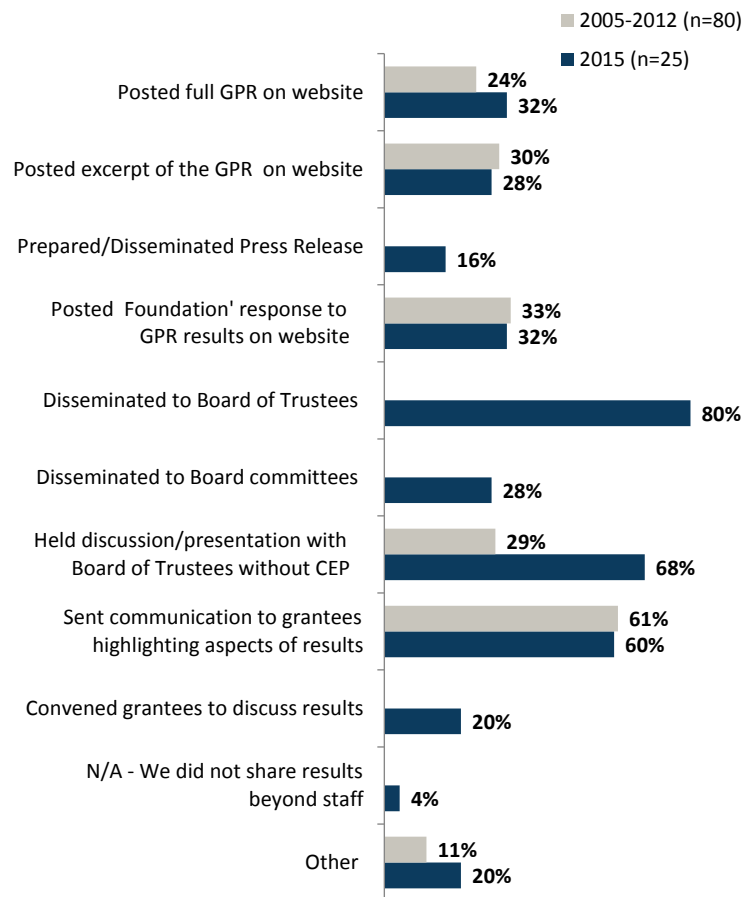
- Services and features that some respondents indicate as less helpful include the grantee list process and segmentation of data by program officer. Additionally, while many respondents (76%) report the Memorandum of Key Findings to be helpful or very helpful, 16% rated this feature with a score of 3.



## Approaches for Sharing GPR Results

- The majority of GPR subscribers share GPR results with their boards and use the results to generate discussion related to metrics and strategy.
- More than half (60%) of GPR subscribers also communicated highlights of GPR results with grantees.
- One subscriber also reported sharing GPR results in their organization's annual report.

**Exhibit 6. Approaches for Sharing GPR Results<sup>1 2</sup>**



<sup>1</sup> The sum of the percentages is more than 100% because respondents could check all that apply.

<sup>2</sup> Additional survey items were added in the 2015 surveys.

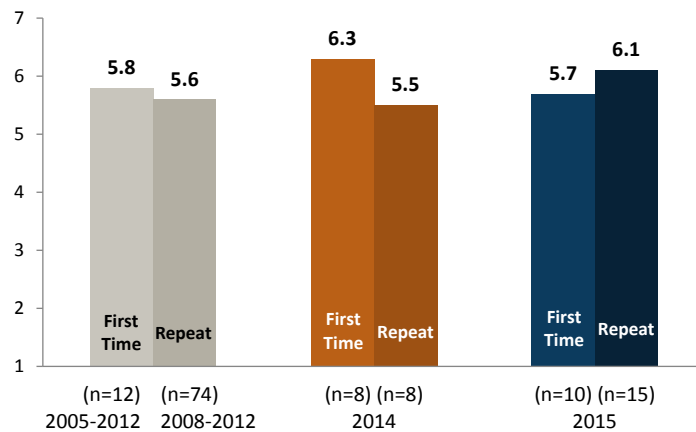
## Value of the GPR Overall

- 2015 respondents consider the GPR to be highly valuable relative to cost.

The high overall value-to-cost ratio for 2015 respondents (6.0 for first-time and repeat users combined) may mean that subscribers value the GPR more highly than other processes for measuring overall funder effectiveness. While there was a slight drop from the 2014 cohort to the 2015 cohort in ratings of value relative to cost for first-time users, and a slight increase in ratings of value for cost among repeat users, these differences were not statistically significant (see Exhibit 7).

- While 2015 respondents, both first-time and repeat-subscribers, report the value for the GPR to be high, several subscribers indicated that the cost of the GPR prohibits frequent usage.
- 2015 repeat subscribers reported higher ratings than first-time users on value for cost. In previous cohorts, value for cost was rated lower for repeat users than first-time users.

**Exhibit 7. Value of the GPR Relative to its Cost<sup>†</sup>**



<sup>†</sup> No pairwise comparisons were statistically significant.

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The results were invaluable, **but the cost does prohibit us from doing this too frequently.**

While it was **quite expensive, we felt it was a sound investment** in the future of the foundation.

**The cost is very reasonable for the value we receive** - and the comparative data from other foundations and their grantees is **unique and extremely valuable.**

The **cost** for fielding the survey and CEP's analysis **was very reasonable, given the [return on investment].**

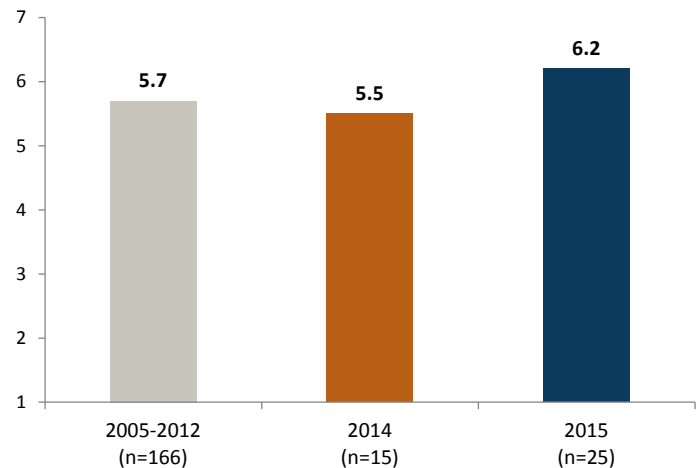
Grantee Perception Report (GPR) Subscribers

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## Usefulness of the GPR

- 2015 users report an increase (6.2) over previous cohorts in the usefulness of the GPR relative to other processes for measuring overall funder effectiveness, after a slight drop in 2005-2012 cohort ratings (5.7) to 2014 ratings (5.5) (see Exhibit 8). This increase did not reach statistical significance.
- First time-users reported higher ratings of usefulness (6.4) than repeat users (6.0) in 2015, though this difference was not statistically significant.
- The GPR is highly valued as a tool for benchmarking foundation effectiveness as well as for providing longitudinal data so that foundations can examine performance trends over time.
- GPR users indicated that the GPR is useful in surfacing areas for enhancing communication with grantees, such as responsiveness and frequency and quality of contact, as well as clarifying grant guidelines and requirements, and providing additional assistance to grantees. GPR results are also valuable in informing strategic planning processes, such as improving grantmaking processes and procedures.

**Exhibit 8. Usefulness of the GPR<sup>†</sup>**



<sup>†</sup> No pairwise comparisons were statistically significant.

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The most **important impact** of the GPR is to change our culture by making our staff **better aware of the effect of our [processes and strategies] on our grantseekers and grantees.**

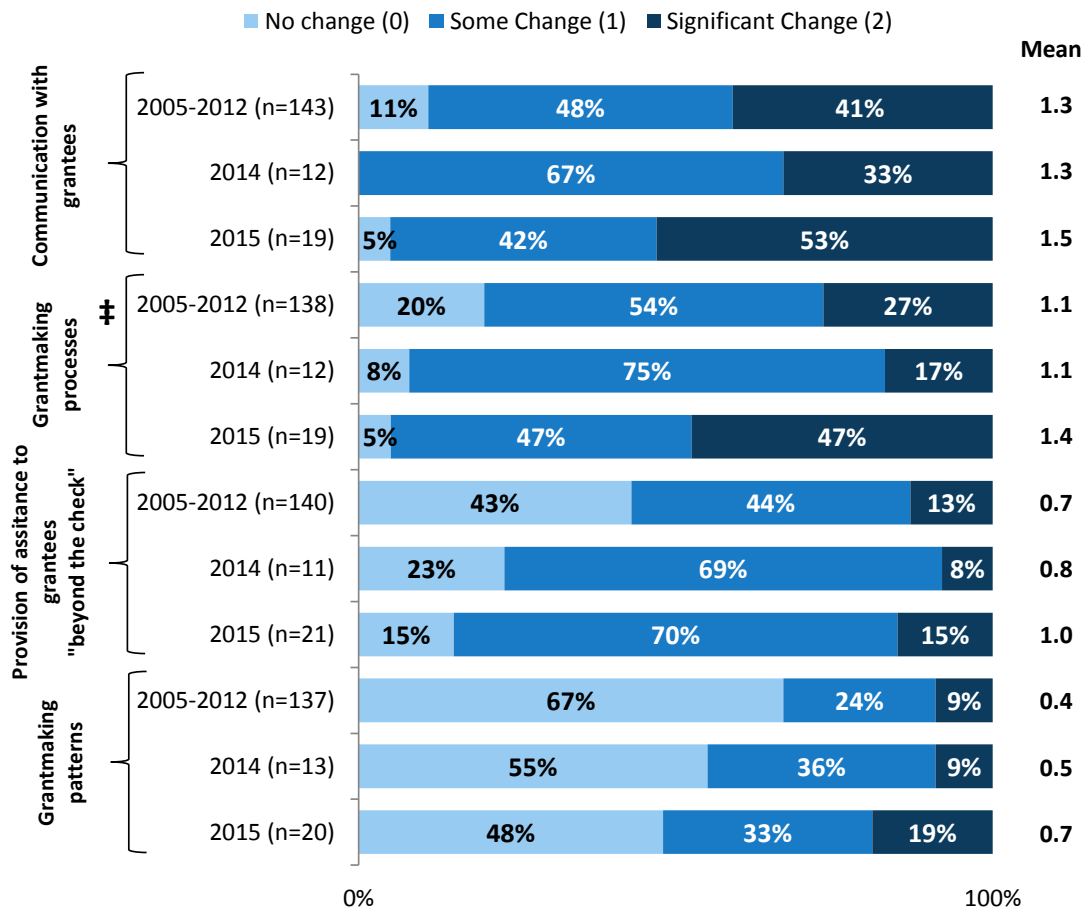
Grantee Perception Report (GPR) Subscribers

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## Changes Inspired by GPR Results

- One of the greatest indicators of the GPR's effectiveness is the extent to which findings inform organizational changes. Grantmaking organizations use initial GPR results to benchmark and set goals to improve performance, and then trend data to understand changes in performance over time. Respondents shared the degree to which the GPR inspired changes in the following areas: grantee engagement;<sup>2</sup> grantmaking processes;<sup>3</sup> foundation strategy;<sup>4</sup> and foundation performance.<sup>5</sup> Within these four areas, the GPR findings inspired the most change in grantee engagement and grantmaking processes (see Exhibit 9).

**Exhibit 9. Changes Inspired by GPR Results<sup>‡ α</sup>**



<sup>‡</sup> Approaching statistical significance between the 2005-2012 and 2015 cohorts,  $p < .10$

<sup>α</sup> The sum of the percentages may be more or less than 100% due to rounding.

<sup>2</sup> The grantee engagement area consists of three components: communications with grantees, attitudes towards working with grantees, and provision of assistance to grantees "beyond the check."

<sup>3</sup> The grantmaking processes area consists of two components: grantmaking processes and grantmaking patterns.

<sup>4</sup> The foundation strategy area consists of three components: foundation strategy, staffing levels, and allocation of resources to a particular program area.

<sup>5</sup> The foundation performance area consists of two components: addressing performance of a particular program officer/staff member and addressing performance of or approach to a particular program area.

- **2015 respondents continue to report the most significant changes affected by GPR results related to grantmaking processes and communications with existing grantees.** Changes in these areas are high across all cohorts, and ratings of both of these types of GPR impacts have experienced increases in 2015. Specific areas of grantmaking processes cited by 2015 respondents include changes in performance metrics and tools for data collection and analysis.
- **GPR subscribers also report an increase over previous cohorts in GPR impact on grantmaking patterns and provision of assistance to grantees “beyond the check”.** While ratings of the magnitude of these changes remain relatively low, the numbers who are reporting no change at all in these areas are dropping.
- **GPR subscribers report a substantive increase in the 2015 cohort in use of GPR results to inform changes *other* than those identified in the GPR assessment survey.** Qualitative responses do not reveal the nature of these “other” changes, but may be an area of additional inquiry of interest to CEP.
- 2015 respondents indicated that they would benefit from assistance with developing clear, actionable next steps informed by GPR results. Provision of information related to best practices in growth areas would also be helpful in informing organizational changes informed by GPR results.
- Respondents also reported tension between the interest and value of survey customization that enables users to attain highly relevant information with the ability to develop benchmarks across foundations.

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[Ongoing evaluation will] **impact** our grantmaking strategy and our grantmaking and management tools. **We will be using the findings from the CEP survey to inform of our new ways of working.**

We have been **grappling with the strategic question of [types of funding]**. The findings are [informing that decision].

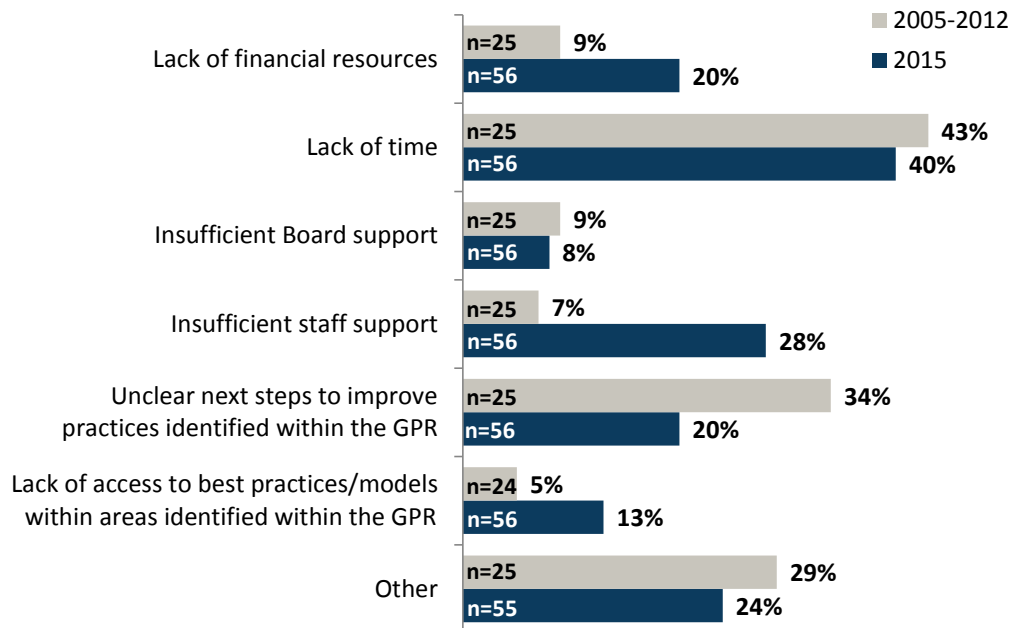
Grantee Perception Report (GPR) Subscribers

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## Barriers to Making Change

- 2015 respondents consider GPR findings valuable; however, respondents cited lack of resources as a primary barrier to implementing changes informed by the GPR (see Exhibit 10).** Limited resources for affecting change include insufficient time (40%), staff support (28%), and money to do so (20%). Notably, lack of sufficient staff support demonstrated a statistically significant increase as a barrier to making change from the 2005-2012 to the 2015 cohort.

**Exhibit 10. Barriers to Making Change<sup>1 2</sup>**



<sup>1</sup> Survey item was not administered in the 2014 GPR First-Time and Repeat User surveys

<sup>2</sup> The sum of the percentages is more than 100% because respondents could check all that apply.

- Twenty percent of 2015 respondents report unclear next steps to improve practices based on GPR results, which represents a decrease from previous years (34%). While CEP may not be in a position to influence organizational resources, there is an opportunity for CEP to provide greater clarity and technical assistance for organizations to translate GPR findings into actionable next steps toward advancing organizational strategy, performance and impact.

Much of the change is around refining our grantmaking processes and reflecting on the type of grantmaker that we want to be. **The team has met to discuss and prioritize the recommendations, which include some [options] that we would find difficult to change considering our current resources.**

We would be **unlikely to act on GPR results in isolation.** Most of the data points [...] need to be **considered within the context of our strategies and organizational priorities.**

Grantee Perception Report (GPR) Subscribers

## Conclusion

Results from the 2015 GPR Subscriber Assessment reveal continued high levels of satisfaction with the GPR experience, the services provided by CEP staff and the features available via both online and print formats of GPR results. Respondents indicate GPR results continue to be a valuable asset in guiding foundation strategy and communications. CEP may want to consider providing more guidance regarding the functionality and additional analyses available via the online portal, as some users, specifically first-time subscribers, report underutilizing these features. Maximizing use of these enhanced features may help to mitigate value-for-cost concerns raised by some respondents. CEP should also consider ways to address subscriber requests for CEP assistance in developing clear, actionable next steps from GPR results.



# Grantee Perception Report® (GPR) Subscriber Assessment Survey: Cohort Analysis Summary

Note: Statistical significance is not reported for n<5.

**Exhibit 11. General Impressions of the GPR Process<sup>†</sup>**

	Mean		
	2005-2012	2014	2015
Overall Satisfaction <sup>1</sup>	6.1 (n=213)	6.1 (n=16)	6.4 (n=25)
Responsiveness of CEP Staff to Questions <sup>2</sup>	6.6 (n=212)	6.8 (n=16)	6.6 (n=25)
Helpfulness of CEP Staff Responses <sup>3</sup>	6.3 (n=213)	6.3 (n=16)	6.3 (n=25)

<sup>†</sup> No pairwise comparisons were statistically significant.

**Exhibit 12. Satisfaction with Aspects of the GPR Report**

	Mean		
	2005-2012	2014	2015
The clarity of data charts and graphs in the GPR report	5.2 <sup>a</sup> (n=206)	5.7 (n=16)	5.8 <sup>a</sup> (n=25)
The look and feel of the interactive online GPR report	5.3 (n=24)	5.5 (n=15)	5.9 (n=24)
Ease of accessing online report (e.g., login process)	-	5.9 (n=15)	5.8 (n=25)
Ease of navigating online report	-	5.7 (n=15)	5.8 (n=25)
Ease of finding supplemental downloadable materials in the online system, (e.g., Print-Ready PDF Report, PDF Table of Grantee Comments)	-	5.6 (n=15)	5.6 (n=24)
The extent to which CEP's interpretation of the results was meaningful for guiding reflection on your foundation's performance overall	5.8 (n=205)	5.6 (n=16)	5.8 (n=25)
The extent to which the GPR report highlighted specific areas in which your foundation was performing well	5.9 (n=204)	6.1 (n=16)	6.2 (n=25)
The extent to which the GPR report highlighted specific areas in which your foundation could improve performance	5.8 (n=205)	5.8 (n=16)	6.1 (n=25)
How useful the GPR was on its own (without CEP staff explanation)	4.9 <sup>a</sup> (n=206)	-	5.5 <sup>a</sup> (n=24)

### Exhibit 12. Satisfaction with Aspects of the GPR Report

	Mean		
	Scale: 1 = "Not at all satisfied" to 7 = "Very satisfied"		
	2005-2012	2014	2015
The extent to which the GPR helped deepen the foundation's understanding of its grantees' needs/interests	-	-	5.9 (n=25)

<sup>a</sup> Statistically significant difference between the 2005-2012 and the 2015 groups,  $p < .05$ .

### Exhibit 13. Helpfulness of GPR Services and Features<sup>†</sup>

	Mean		
	Scale: 1 = "Not at all helpful" to 7 = "Very helpful"		
	2005-2012	2014	2015
Survey customization processes	-	-	6.2 (n=25)
Grantee list compilation process	-	-	5.7 (n=19)
Memorandum of Key Findings and Recommendations/Executive Summary	-	6.2 (n=14)	5.9 (n=25)
Interactive online report	-	5.9 (n=13)	6.2 (n=23)
Ability to toggle online results by different cohorts of funders	-	5.5 (n=10)	6.2 (n=22)
Ability to toggle online results by different subgroups of my foundation's data. (e.g., program area)	-	6.0 (n=9)	6.2 (n=20)
Segmentation of the data by program officer	5.7 (n=57)	6.2 (n=6)	5.9 (n=14)
Printable PDF report of charts and tables	-	6.1 (n=15)	6.1 (n=21)
Downloadable PDF of all grantee comments and suggestions for the foundation	-	6.1 (n=15)	6.3 (n=25)
Telephone conversation with CEP staff about preliminary report findings	6.1 (n=147)	6.1 (n=15)	6.3 (n=24)
In-person presentation by CEP staff	6.3 (n=176)	6.3 (n=14)	6.4 (n=17)
Supplemental in-person presentation(s) (e.g., to the board)	6.3 (n=125)	6.4 (n=9)	6.4 (n=14)
Further discussion or analysis after the presentation	-	-	5.9 (n=13)

<sup>†</sup> No pairwise comparisons were statistically significant.

#### Exhibit 14. Version of GPR Accessed Most Frequently

	Percentage		
	2005-2012	2014	2015
Printable PDF report of charts and tables	-	-	76% (n=19)
Online report of charts and tables	-	-	24% (n=6)

#### Exhibit 15. Understanding of Organizational Context<sup>†</sup>

	Mean Scale: 1 = "Not at all well" to 7 = "Extremely well"		
	2005-2012	2014	2015
The extent to which CEP's work reflected a clear understanding of the specific organizational context of your foundation	5.3 (n=24)	5.6 (n=16)	5.8 (n=24)

<sup>†</sup> No pairwise comparisons were statistically significant.

#### Exhibit 16. Quality of CEP's In-Person Presentation<sup>†</sup>

	Mean Scale: 1 = "Poor" to 7 = "Excellent"		
	2005-2012	2014	2015
Quality of CEP's in-person presentation	6.2 (n=193)	6.5 (n=15)	5.9 (n=24)

<sup>†</sup> No pairwise comparisons were statistically significant.

#### Exhibit 17. Approaches for Sharing GPR Results

	Percentage Check all that apply		
	2005-2012	2014	2015
Posted full GPR on website	24% (n=80)	-	32% (n=25)
Posted excerpt of the GPR on website	30% (n=80)	-	28% (n=25)
Prepared/Disseminated Press Release	-	-	16% (n=25)
Posted Foundation's response to GPR results on website	33% (n=80)	-	32% (n=25)
Disseminated to Board of Trustees	-	-	80% (n=25)
Disseminated to Board committees	-	-	28% (n=25)
Held discussion/presentation with Board of Trustees without CEP <sup>1</sup>	29% (n=80)	-	68% (n=25)
Sent communication to grantees highlighting aspects of results	61% (n=80)	-	60% (n=25)

### Exhibit 17. Approaches for Sharing GPR Results

	Percentage Check all that apply		
	2005-2012	2014	2015
Convened grantees to discuss results	-	-	20% (n=25)
N/A – We did not share our results beyond staff	-	-	4% (n=25)
Other	11% (n=80)	-	20% (n=25)

<sup>1</sup> Language used in the 2005-2012 surveys read: “Held discussion to share results.”

### Exhibit 18. Changes Inspired by GPR Results<sup>†</sup>

	Mean Scale: 0 = “No Change” to 2 = “Significant Change”		
	2005-2012	2014	2015
Communications with existing grantees (e.g., clarity, methods)	1.3 (n=143)	1.3 (n=12)	1.5 (n=19)
Grantmaking processes (e.g., selection, reporting and evaluation processes)	1.1 (n=138)	1.1 (n=12)	1.4 (n=19)
Grantmaking patterns (e.g., size and length of grants)	0.4 (n=140)	0.5 (n=11)	0.7 (n=21)
Foundation strategy (e.g., what it is you’re trying to do, focus)	0.5 (n=142)	0.4 (n=12)	0.5 (n=22)
Provision of assistance to grantees beyond “the check” (e.g., management assistance, field-related assistance, assistance securing funding from other sources)	0.7 (n=137)	0.8 (n=13)	1.0 (n=20)
Staffing levels	0.3 (n=145)	0.4 (n=12)	0.1 (n=22)
Attitudes toward work with grantees	0.8 (n=148)	0.8 (n=12)	0.9 (n=22)
Allocation of resources for a particular program area	0.1 (n=148)	0.3 (n=13)	0.2 (n=21)
Addressing performance of a particular program officer/other staff member	0.3 (n=145)	0.1 (n=13)	0.4 (n=21)
Addressing performance of or approach to a particular program area	0.3 (n=143)	0.4 (n=13)	0.5 (n=21)
Other	0.5 (n=37)	0.0 (n=3)	1.3 (n=3)

<sup>†</sup> No pairwise comparisons were statistically significant.

### Exhibit 19. Ways in Which Consultants Were Used

	Percentage Check all that apply		
	2005-2012	2014	2015
To facilitate internal conversations	-	100% (n=1)	25% (n=8)
To design/structure the change process (e.g., identify next steps, advise on stages of implementation, etc.)	-	0% (n=0)	25% (n=8)
To run focus groups of grantees	-	0% (n=0)	13% (n=8)
To collect further data through interviews with other funders	-	0% (n=0)	25% (n=8)
To design new or update existing foundation processes	-	0% (n=0)	38% (n=8)
Other	-	0% (n=0)	38% (n=8)

### Exhibit 20. Barriers to Making Change in Work Based on GPR Results

	Percentage Check all that apply		
	2005-2012	2014	2015
Lack of financial resources	9% (n=56)	-	20% (n=25)
Lack of time	43% (n=56)	-	40% (n=25)
Insufficient Board support	9% (n=56)	-	8% (n=25)
Insufficient staff support	7% <sup>a</sup> (n=56)	-	28% <sup>a</sup> (n=25)
Unclear next steps to improve practices identified within the GPR	34% (n=56)	-	20% (n=25)
Lack of access to best practices/models within areas identified within the GPR	5% (n=56)	-	13% (n=24)
Other	29% (n=55)	-	24% (n=25)

<sup>a</sup> Statistically significant difference between the 2005-2012 and the 2015 groups,  $p < .01$ .

### Exhibit 21. Usefulness and Value of the GPR Overall<sup>†</sup>

	Mean		
	2005-2012	2014	2015
Useful relative to other processes for measuring overall funder effectiveness <sup>1</sup>	5.7 (n=166)	5.5 (n=15)	6.2 (n=25)
Value relative to cost <sup>2</sup>	5.8 (n=199)	5.9 (n=16)	6.0 (n=25)

<sup>†</sup> No pairwise comparisons were statistically significant.

### Exhibit 22. Recommending the GPR and Intent to Repeat

	Percentage								
	2005-2012			2014			2015		
Recommending the GPR, or repeating the GPR, to colleague foundations	98% (n=198)			94% (n=16)			100% (n=25)		
Intent to re-commission the GPR	Yes	No	Don't know	Yes	No	Don't know	Yes	No	Don't know
	64% (n=199)	4% (n=199)	33% (n=199)	81% (n=16)	6% (n=16)	13% (n=16)	80% (n=25)	20% (n=25)	0% (n=25)
	Mean in Years								
Timeframe for repeating the GPR <sup>†</sup>	2.6 (n=109)			2.3 (n=13)			3.0 (n=20)		

<sup>†</sup> No pairwise comparisons were statistically significant.

### Exhibit 23. Interest in New Subscription Model

	Percentage		
	Check all that apply		
	2015		
	Yes	No	Other <sup>2</sup>
Foundation interest in subscription model of receiving more frequent ongoing grantee feedback via CEP <sup>1</sup>	21% (n=24)	29% (n=24)	50% (n=24)

<sup>1</sup> Survey question administered in the 2015 GPR First-Time and Repeat surveys.

<sup>2</sup> Those who selected "other" indicated that they would need more information before making a decision.

# Grantee Perception Report® (GPR) Subscriber Assessment Survey: First-Time and Repeat User Analysis Summary

Note: Statistical significance is not reported for n<5.

**Exhibit 24. General Impressions of the GPR Process**<sup>†</sup>

	Mean					
	Scale: 1 = "Not at all satisfied" to 7 = "Very satisfied"					
	First-Time Users			Repeat Users		
	2005-12	2014	2015	2008-12	2014	2015
Overall Satisfaction <sup>1</sup>	6.1 (n=137)	6.4 (n=8)	6.4 (n=10)	6.1 (n=76)	5.8 (n=8)	6.3 (n=15)
Responsiveness of CEP Staff to Questions <sup>2</sup>	6.6 (n=136)	6.6 (n=8)	6.5 (n=10)	6.5 (n=76)	6.9 (n=8)	6.6 (n=15)
Helpfulness of CEP Staff Responses <sup>3</sup>	6.3 (n=137)	6.0 (n=8)	6.4 (n=10)	6.3 (n=76)	6.6 (n=8)	6.3 (n=15)

<sup>†</sup> No pairwise comparisons were statistically significant.

**Exhibit 25. Satisfaction with Aspects of the GPR Report**

	Mean					
	Scale: 1 = "Not at all satisfied" to 7 = "Very satisfied"					
	First-Time Users			Repeat Users		
	2005-12	2014	2015	2008-12	2014	2015
The clarity of data charts and graphs in the GPR report	5.2 (n=131)	5.9 (n=8)	5.4 (n=10)	5.1 (n=75)	5.5 (n=8)	6.0 (n=15)
The look and feel of the interactive online GPR report	5.1 (n=9)	5.9 (n=8)	5.7 (n=9)	5.4 (n=15)	5.1 (n=7)	6.1 (n=15)
Ease of accessing online report (e.g., login process)	-	5.9 (n=8)	5.8 (n=10)	-	5.9 (n=7)	5.9 (n=15)
Ease of navigating online report	-	5.8 (n=8)	5.6 (n=10)	-	5.6 (n=7)	6.0 (n=15)
Ease of finding supplemental downloadable materials in the online system, (e.g., Print-Ready PDF Report, PDF Table of Grantee Comments)	-	5.5 (n=8)	5.6 (n=9)	-	5.7 (n=7)	5.7 (n=15)
The extent to which CEP's interpretation of the results was meaningful for guiding reflection on your foundation's performance overall	5.8 (n=130)	5.8 (n=8)	5.7 (n=10)	5.7 (n=75)	5.4 (n=8)	5.9 (n=15)
The extent to which the GPR report highlighted specific areas in which your foundation was performing well	5.8 (n=129)	6.3 (n=8)	6.4 (n=10)	6.0 (n=75)	6.0 (n=8)	6.0 (n=15)
The extent to which the GPR report highlighted specific areas in which your foundation could improve performance	5.8 (n=130)	5.6 (n=8)	6.3 (n=10)	5.7 (n=75)	5.9 (n=8)	5.9 (n=15)



### Exhibit 25. Satisfaction with Aspects of the GPR Report

	Mean Scale: 1 = "Not at all satisfied" to 7 = "Very satisfied"					
	First-Time Users			Repeat Users		
	2005-12	2014	2015	2008-12	2014	2015
How useful the GPR was on its own (without CEP staff explanation)	4.8 <sup>a</sup> (n=131)	-	5.2 (n=10)	5.1 (n=75)	-	5.7 <sup>a</sup> (n=14)
The extent to which the GPR helped deepen the foundation's understanding of its grantees' needs/interests	-	-	6.1 (n=10)	-	-	5.8 (n=15)

<sup>a</sup> Statistically significant difference between the 2005-2012 First-Time and the 2015 Repeat User groups,  $p < .05$ .

### Exhibit 26. Helpfulness of GPR Services and Features

	Mean Scale: 1 = "Not at all helpful" to 7 = "Very helpful"					
	First-Time Users			Repeat Users		
	2005-12	2014	2015	2008-12	2014	2015
Survey customization processes	-	-	6.0 (n=10)	-	-	6.3 (n=15)
Grantee list compilation process	-	-	5.5 (n=8)	-	-	5.8 (n=11)
Memorandum of Key Findings and Recommendations/Executive Summary <sup>1</sup>	-	5.7 (n=7)	5.9 (n=10)	-	6.7 (n=7)	5.9 (n=15)
Interactive online report	-	5.7 (n=7)	5.9 (n=9)	-	6.0 (n=6)	6.4 (n=14)
Ability to toggle online results by different cohorts of funders	-	4.8 <sup>a</sup> (n=5)	6.1 (n=8)	-	6.2 (n=5)	6.2 <sup>a</sup> (n=14)
Ability to toggle online results by different subgroups of my foundation's data. (e.g., program area)	-	5.5 (n=4)	6.1 (n=8)	-	6.4 (n=5)	6.2 (n=12)
Segmentation of the data by program officer	5.9 (n=26)	6.0 (n=3)	6.0 (n=5)	5.6 (n=31)	6.3 (n=3)	5.9 (n=9)
Printable PDF report of charts and tables	-	6.1 (n=8)	6.1 (n=7)	-	6.0 (n=7)	6.1 (n=14)
Downloadable PDF of all grantee comments and suggestions for the foundation	-	5.7 (n=7)	6.3 (n=10)	-	6.4 (n=8)	6.3 (n=15)
Telephone conversation with CEP staff about preliminary report findings	6.1 (n=82)	5.7 (n=7)	6.0 (n=10)	6.1 (n=65)	6.4 (n=8)	6.4 (n=14)
In-person presentation by CEP staff	6.4 (n=113)	6.3 (n=7)	6.0 (n=7)	6.2 (n=63)	6.3 (n=7)	6.6 (n=10)
Supplemental in-person presentation(s) (e.g., to the board)	6.2 (n=77)	6.5 (n=4)	6.0 (n=6)	6.3 (n=48)	6.4 (n=5)	6.6 (n=8)
Further discussion or analysis after the presentation	-	-	5.6 (n=5)	-	-	6.0 (n=8)

<sup>1</sup> In the 2014 survey, this item read as follows: "Memorandum of Key Findings and Recommendations". For the purposes of this analysis, we are considering this question comparable and possible to show trend data.

<sup>a</sup> Approaching statistical significance between 2014 First-Time and 2015 Repeat User groups,  $p < .10$

**Exhibit 27. Version of GPR Accessed Most Frequently**

	Percentage					
	First-Time Users			Repeat Users		
	2005-12	2014	2015	2008-12	2014	2015
Printable PDF report of charts and tables	-	-	90% (n=10)	-	-	67% (n=15)
Online report of charts and tables	-	-	10% (n=10)	-	-	33% (n=15)

**Exhibit 28. Understanding of Organizational Context<sup>†</sup>**

	Mean					
	Scale: 1 = "Not at all well" to 7 = "Extremely well"					
	First-Time Users			Repeat Users		
	2005-12	2014	2015	2008-12	2014	2015
The extent to which CEP's work reflected a clear understanding of the specific organizational context of your foundation	5.2 (n=9)	5.4 (n=8)	5.6 (n=10)	5.3 (n=15)	5.9 (n=8)	5.9 (n=14)

<sup>†</sup> No pairwise comparisons were statistically significant.

**Exhibit 29. Quality of CEP's In-Person Presentation<sup>†</sup>**

	Mean					
	Scale: 1 = "Poor" to 7 = "Excellent"					
	First-Time Users			Repeat Users		
	2005-12	2014	2015	2008-12	2014	2015
Quality of CEP's in-person presentation	6.3 (n=120)	6.5 (n=8)	5.7 (n=9)	6.1 (n=73)	6.4 (n=7)	6.0 (n=15)

<sup>†</sup> No pairwise comparisons were statistically significant.

**Exhibit 30. Approaches for Sharing GPR Results**

	Percentage					
	Check all that apply					
	First-Time Users			Repeat Users		
	2005-12	2014	2015	2008-12	2014	2015
Posted full GPR on website	23% (n=30)	-	10% (n=10)	24% (n=50)	-	47% (n=15)
Posted excerpt of the GPR on website	23% (n=30)	-	20% (n=10)	34% (n=50)	-	33% (n=15)
Prepared/Disseminated Press Release	-	-	20% (n=10)	-	-	13% (n=15)
Posted Foundation's response to GPR results on website	23% (n=30)	-	20% (n=10)	38% (n=50)	-	40% (n=15)
Disseminated to Board of Trustees	-	-	70% (n=10)	-	-	87% (n=15)
Disseminated to Board committees	-	-	30% (n=10)	-	-	27% (n=15)

### Exhibit 30. Approaches for Sharing GPR Results

	Percentage Check all that apply					
	First-Time Users			Repeat Users		
	2005-12	2014	2015	2008-12	2014	2015
Held discussion/presentation with Board of Trustees without CEP <sup>1</sup>	33% (n=30)	-	60% (n=10)	26% (n=50)	-	73% (n=15)
Sent communication to grantees highlighting aspects of results	53% (n=30)	-	40% (n=10)	66% (n=50)	-	73% (n=15)
Convened grantees to discuss results	-	-	20% (n=10)	-	-	20% (n=15)
N/A – We did not share our results beyond staff	-	-	0% (n=10)	-	-	7% (n=15)
Other	17% (n=30)	-	30% (n=10)	8% (n=50)	-	13% (n=15)

<sup>1</sup> Language used in the 2005-2012 surveys read: “Held discussion to share results”.

### Exhibit 31. Changes Inspired by GPR Results<sup>†</sup>

	Mean Scale: 0 = “No Change” to 2 = “Significant Change”					
	First-Time Users			Repeat Users		
	2005-12	2014	2015	2008-12	2014	2015
Communications with existing grantees (e.g., clarity, methods)	1.2 (n=77)	1.0 (n=5)	1.4 (n=9)	1.4 (n=66)	1.6 (n=7)	1.5 (n=10)
Grantmaking processes (e.g., selection, reporting and evaluation processes)	1.1 (n=70)	1.2 (n=5)	1.6 (n=9)	1.1 (n=68)	1.0 (n=7)	1.3 (n=10)
Grantmaking patterns (e.g., size and length of grants)	0.5 (n=73)	0.4 (n=5)	1.0 <sup>a</sup> (n=9)	0.3 <sup>a</sup> (n=67)	0.7 (n=6)	0.5 (n=12)
Foundation strategy (e.g., what it is you’re trying to do, focus)	0.5 (n=74)	0.6 (n=5)	0.6 (n=9)	0.4 (n=68)	0.3 (n=7)	0.5 (n=13)
Provision of assistance to grantees beyond “the check” (e.g., management assistance, field-related assistance, assistance securing funding from other sources)	0.7 (n=68)	0.8 (n=5)	1.1 (n=9)	0.7 (n=69)	0.9 (n=8)	0.9 (n=11)
Staffing levels	0.3 (n=76)	0.6 (n=5)	0.1 (n=8)	0.3 (n=69)	0.3 (n=7)	0.1 (n=14)
Attitudes toward work with grantees	0.8 (n=76)	0.6 (n=5)	0.7 (n=9)	0.8 (n=72)	0.9 (n=7)	1.0 (n=13)
Allocation of resources for a particular program area	0.2 (n=77)	0.4 (n=5)	0.1 (n=9)	0.1 (n=71)	0.3 (n=8)	0.3 (n=12)
Addressing performance of a particular program officer/other staff member	0.3 (n=76)	0.0 (n=5)	0.3 (n=8)	0.3 (n=69)	0.3 (n=8)	0.5 (n=13)

**Exhibit 31. Changes Inspired by GPR Results<sup>†</sup>**

	Mean					
	Scale: 0 = "No Change" to 2 = "Significant Change"					
	First-Time Users			Repeat Users		
	2005-12	2014	2015	2008-12	2014	2015
Addressing performance of or approach to a particular program area	0.3 (n=75)	0.0 (n=5)	0.5 (n=8)	0.4 (n=68)	0.6 (n=8)	0.5 (n=13)
Other	0.4 (n=14)	0.0 (n=1)	2.0 (n=2)	0.5 (n=23)	0.0 (n=2)	0.0 (n=1)

<sup>†</sup> No pairwise comparisons were statistically significant.

**Exhibit 32. Ways in Which Consultants Were Used**

	Percentage					
	Check all that apply					
	First-Time Users			Repeat Users		
	2005-12	2014	2015	2008-12	2014	2015
To facilitate internal conversations	-	0% (n=0)	50% (n=4)	-	100% (n=1)	0% (n=4)
To design/structure the change process (e.g., identify next steps, advise on stages of implementation, etc.)	-	0% (n=0)	50% (n=4)	-	0% (n=1)	0% (n=4)
To run focus groups of grantees	-	0% (n=0)	25% (n=4)	-	0% (n=1)	0% (n=4)
To collect further data through interviews with other funders	-	0% (n=0)	25% (n=4)	-	0% (n=1)	25% (n=4)
To design new or update existing foundation processes	-	0% (n=0)	50% (n=4)	-	0% (n=1)	25% (n=4)
Other	-	0% (n=0)	0% (n=4)	-	0% (n=1)	75% (n=4)

**Exhibit 33. Barriers to Making Change in Work Based on GPR Results**

	Percentage					
	Check all that apply					
	First-Time Users			Repeat Users		
	2005-12	2014	2015	2008-12	2014	2015
Lack of financial resources	14% (n=21)	-	30% (n=10)	6% (n=35)	-	13% (n=15)
Lack of time	33% (n=21)	-	40% (n=10)	49% (n=35)	-	40% (n=15)
Insufficient Board support	10% (n=21)	-	10% (n=10)	9% (n=35)	-	7% (n=15)
Insufficient staff support	0% (n=21)	-	20% (n=10)	11% (n=35)	-	33% (n=15)

**Exhibit 33. Barriers to Making Change in Work Based on GPR Results**

	Percentage Check all that apply					
	First-Time Users			Repeat Users		
	2005-12	2014	2015	2008-12	2014	2015
Unclear next steps to improve practices identified within the GPR	19% (n=21)	-	0% (n=10)	43% (n=35)	-	33% (n=15)
Lack of access to best practices/models within areas identified within the GPR	0% (n=21)	-	11% (n=9)	9% (n=35)	-	13% (n=15)
Other	33% (n=21)	-	10% (n=10)	27% (n=34)	-	33% (n=15)

**Exhibit 34. Usefulness and Value of the GPR Overall<sup>†</sup>**

	Mean					
	First-time Users			Repeat Users		
	2005-12	2014	2015	2008-12	2014	2015
Useful relative to other processes for measuring overall funder effectiveness <sup>1</sup>	5.7 (n=101)	5.9 (n=7)	6.4 (n=10)	5.5 (n=65)	5.1 (n=8)	6.0 (n=15)
Value relative to cost <sup>2</sup>	5.8 (n=125)	6.3 (n=8)	5.7 (n=10)	5.6 (n=74)	5.5 (n=8)	6.1 (n=15)
Value for repeat subscribers compared to previous GPRs <sup>3</sup>	-	-	-	4.4 (n=69)	4.4 (n=8)	4.8 (n=14)

<sup>†</sup> No pairwise comparisons were statistically significant.

**Exhibit 35. Recommending the GPR and Intent to Repeat**

	Percentage																	
	First-Time Users									Repeat Users								
	2005-12			2014			2015			2008-12			2014			2015		
Recommending the GPR, or repeating the GPR, to colleague foundations	98% (n=125)			100% (n=8)			100% (n=10)			97% (n=73)			88% (n=8)			100% (n=15)		
Intent to re-commission the GPR <sup>†</sup>	Yes	No	Don't know	Yes	No	Don't know	Yes	No	Don't know	Yes	No	Don't know	Yes	No	Don't know	Yes	No	Don't know
	58% (n=125)	4% (n=125)	38% (n=125)	75% (n=8)	13% (n=8)	13% (n=8)	70% (n=10)	30% (n=10)	0% (n=10)	74% (n=8)	3% (n=8)	23% (n=8)	88% (n=8)	13% (n=8)	0% (n=8)	87% (n=15)	13% (n=15)	0% (n=15)
	Mean in Years																	
Timeframe for repeating the GPR	2.6 (n=52)			2.7 (n=6)			3.0 (n=7)			2.5 (n=57)			2.0 (n=7)			2.9 (n=13)		

<sup>†</sup> No pairwise comparisons were statistically significant.

**Exhibit 36. Interest in New Subscription Model**

	Percentage Check all that apply					
	2015					
	First-Time Users			Repeat Users		
	Yes	No	Other <sup>2</sup>	Yes	No	Other <sup>2</sup>
Foundation interest in subscription model of receiving more frequent ongoing grantee feedback via CEP <sup>1</sup>	20% (n=10)	20% (n=10)	60% (n=10)	21% (n=14)	38% (n=14)	43% (n=14)

<sup>1</sup> Survey question administered in the 2015 GPR First-Time and Repeat User surveys.

<sup>2</sup> Those who selected “other” indicated that they would need more information before making a decision.