

CEP Staff Perception Report Evaluation Brief

April 2015

The Center for Effective Philanthropy (CEP) provides a variety of tools and services to help grantmakers do their work in a way that promotes constituent input, field benchmarking, and foundation transparency. One of these tools is the Staff Perception Report (SPR), a survey designed by CEP to elicit foundation staff perspectives on many aspects of the work environment. Large foundations (i.e., foundations with more than 15 staff members) can use the survey to understand such crucial management issues as staff satisfaction, capacity, and empowerment. CEP commissioned Harder+Company Community Research to conduct the first external assessment of the SPR in six years. The assessment has two main purposes:

- **Determine the SPR’s usefulness and the extent to which it has strengthened foundations so they may achieve greater effectiveness, and**
- **Identify ways CEP might adapt the SPR to be more responsive to the needs of its target market and ultimately become more sustainable.**

The SPR includes an online survey, a written report of findings, an interactive online report (introduced in 2013), and an in-person presentation. This assessment encompassed all aspects of the SPR, the findings of which are summarized in this brief. The brief begins with a summary of methods and overall findings, a description of why users selected the SPR, and how satisfied they were with it. It then describes the impact SPR findings had on SPR user organizations, and users’ feedback on its content and results. It also includes a summary of insights from non-users of the SPR, and obstacles to attracting new users. Finally, it includes recommendations for how to make the SPR more effective and sustainable.

Key Findings and Recommendations

The findings in this brief are based on interviews with 24 leaders representing 21 foundations. Respondents were predominantly SPR users but also included individuals from six foundations that had considered using the SPR within the past two years but then opted to use a different staff survey tool instead. Six of the respondents were CEOs, 13 were human resources leaders, and five held other senior leadership roles.¹ Overall, the results of this assessment are very positive. Respondents highly valued the process and results, but some had suggestions for how to make it more effective. Summarized below are key findings and Harder+Company’s recommendations, which build upon respondent feedback.

Summary of Key Findings

- **SPR users and non-users alike conveyed that they are strong supporters of CEP.** These respondents noted that they consider CEP to be a leader in improving the practice of philanthropy. All respondents subscribe to CEP’s GPR and many explained that this was a factor that led them to consider using the SPR.

¹ At four SPR-using foundations, Harder+Company interviewed two representatives (individually). Three of the non-users had used the SPR in the past and were included as both SPR users and non-users in the data analysis, although one of these individuals did not answer many of the user-specific questions due to time constraints. More detailed information about the methods and limitations can be found in the Appendix.

- **Most of the SPR users highly valued the SPR.** When asked if their organizations planned to use the SPR again in the future, three-quarters of respondents (75 percent) said “yes” and the remaining quarter (25 percent) indicated “maybe.” (None of the SPR users said “no.”) In addition, nearly two-thirds (65 percent) were very or extremely likely to recommend the SPR to a friend or colleague.
- **Nearly all of the SPR users interviewed reported that they had made important organizational changes as a result of SPR findings.** These SPR users believed acting on the SPR results had led to improvements in organizational culture and internal communication, among other areas, which increased their effectiveness.
- **Over three-quarters of SPR users suggested at least one improvement to the SPR.** Close to one-quarter of all users (n=5) indicated CEP could continue to improve the presentation of the data (although three out of the five respondents who expressed this had used the older paper-based SPR reporting system). Nearly one-fifth (n=4) suggested that perhaps CEP could have provided more guidance, resources, and best practices on how to address issues identified through the survey. And 14 percent of users (n=3) strongly recommended that CEP place greater focus on employee engagement.
- **Five out of the six non-SPR user organizations did not plan to consider the SPR in the future.** While these respondents noted their foundations would continue to be GPR customers, they anticipated that their organizations would not use the SPR in the future. Instead, they would use other staff survey instruments, for reasons such as cost (n=3), the ability to benchmark with high-performing organizations in other sectors (n=3), and a greater focus on employee engagement (n=1).

Summary of Recommendations

- **CEP will likely need to address the desire for more questions around “employee engagement” to help maintain its current SPR subscribership level.** Three current SPR users and one non-user (representing four large foundations) emphasized insufficient focus on engagement as a primary concern. The three current SPR users noted they will likely consider alternatives to the SPR that have a greater focus on engagement. They explained that employees can be satisfied and/or empowered but still be disengaged in their work or the organization. They would like CEP to add more measures that address how committed and energized employees are about their jobs and how passionate they are about the foundation.
- **To attract more interest in the tool, CEP could consider engaging in more thought leadership around employee work experiences.** As noted by four of the respondents, the field of philanthropy has not elevated the importance of the experiences of foundation staff. CEP’s senior leaders could help foundation executives appreciate the value of examining employee issues.
- **CEP could add a pulse survey option to enhance the SPR.** Among those asked about the option of a shorter, periodic survey to supplement the full SPR, well over three-quarters (85 percent) expressed interest. Some noted that they have been creating their own pulse surveys internally to monitor progress.
- **CEP could consider ways to mitigate the costs of the SPR for users.** The cost of the SPR was an obstacle raised by three non-users and two users. One SPR user indicated the organization would conduct the SPR more frequently if it were less expensive, and this was the primary issue that prevented one non-user from using it. One possibility would be to offer a scaled back or a la carte version of the SPR with the caveat that most users have found CEP’s interpretation, advice, and connections to be essential.

What Influenced Users to Select the SPR?

Interviews with SPR users included an open-ended question about their motivations for selecting the SPR. Respondents often cited more than one influence. As shown in Exhibit 1, **peer benchmarking** was the most common reason that respondents cited, followed by a **positive experience with the GPR**, and the **desire to measure change over time**. A few respondents noted that CEP was willing to accommodate their desire for some **customization** of survey questions, and that this flexibility played an important role in their selection of the SPR. One respondent reflected on their previous experience with CEP as their primary reason for selecting the SPR: “Our president has been very involved with CEP, we’ve done other surveys with them, and they have a great reputation as the go-to firm for this type of thing.”

Exhibit 1. What influenced your decision to select the SPR? (n=20)

	n	%
Peer benchmarking	11	55%
Positive experience w/ GPR	9	45%
Desire to measure change over time	5	25%
Ability to customize	3	15%
CEP has a great reputation	2	10%
CEO on CEP board	2	10%
Peers recommended it/were using it	2	10%

What Did SPR Users Value Most?

SPR users cited a range of factors that they valued the most about the tool, and some had difficulty singling out what was most valuable. Consistent with the importance they placed on peer benchmarking when selecting the SPR, one-third of respondents (33 percent) indicated that **peer benchmarking** was the most valuable aspect of the SPR. As one of them commented, “Being able to compare ourselves against other organizations was really important context for us to have.”

Other responses to this question were wide ranging:

- Three respondents (17 percent) noted that **CEP’s recommendations** were the most valuable aspect of the SPR. In the words of one respondent, “To be able to synthesize all of the results and come up with some clear, key recommendations, that was extraordinarily helpful.”
- Three respondents (17 percent) reported that the **small group meetings** CEP staff has with senior staff to guide and help them interpret and use the results was the most meaningful aspect to them. “The Center staff actually was very helpful in talking us through how to use it [the survey results], and that was as important as the study itself,” one of them explained. “The report itself was excellent, but the

“I can’t emphasize enough the quality of the analysis and recommendations in the SPR.”

- SPR User

follow-up call [to discuss findings with CEP] is what is really the most meaningful to me,” another interviewee commented.

- The value of the **summary of key findings** was another element that three respondents (17 percent) highlighted. Two respondents (11 percent) cited the **in-person presentation** and two (11 percent) noted the **measurement of change over time** as the most valuable aspects of the SPR.

How Satisfied Were SPR Users?

Most users intend to repeat the SPR

When asked if they anticipate their organization using the SPR again, none of the SPR users said “no.” In fact, as shown in Exhibit 2, **three-quarters indicated they do anticipate repeating the SPR**, whereas one-quarter indicated that they might repeat the survey.

75% of respondents said their organizations will use the SPR again.

Source: SPR user interviews

Exhibit 2. Do you anticipate your organization will use the SPR again?

	All users (n=20)	CEOs (n=6)	HR leaders & Other (n=14)
Yes	75% (15)	83% (5)	71% (10)
Maybe	25% (5)	17% (1)	29% (4)

Most users are highly likely to recommend SPR

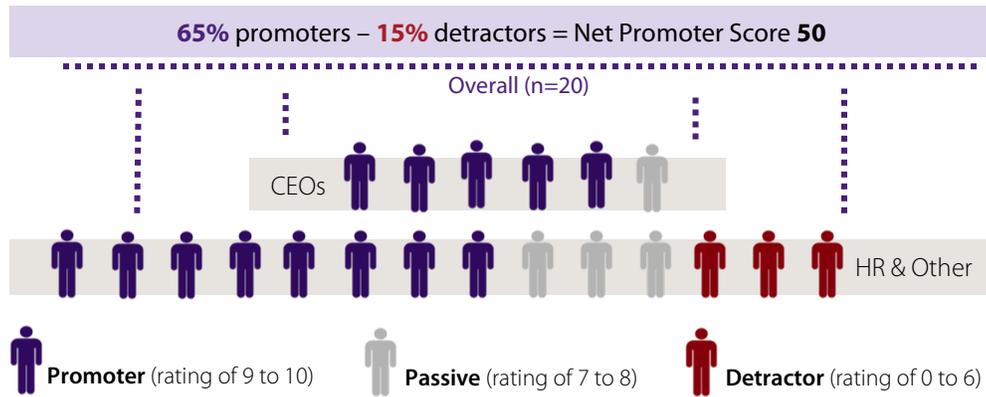
Interviewees were asked to rate the likelihood they would recommend the SPR to a friend or colleague using a scale of 0 to 10, with ‘0’ meaning ‘not at all likely,’ and ‘10’ meaning ‘extremely likely.’ This rating scale is known as the Net Promoter Score, and has gained popularity in business over the past decade as a proxy for measuring customer loyalty and overall satisfaction with a company or product.² The score is calculated by subtracting the percentage of detractors from the percentage of promoters, and can range from -100 (all respondents are detractors) to +100 (all respondents are promoters). The developer of this model, Bain & Company’s Fred Reichheld, has found that the average Net Promoter score of companies he has surveyed is about 15 percent. Scores higher than 15 percent are considered above average and 50 percent or above are usually considered excellent. As Exhibit 3 shows, **the SPR’s Net Promoter score is 50**. In addition, the mean score is 8, the median is 9, and the mode is 10. CEOs gave higher scores overall than did HR directors and other respondents. Only three out of 20 respondents are classified as detractors (all three are current SPR users). These findings suggest a high level of customer loyalty and satisfaction. However, due to the small number of respondents to this question, these results should be interpreted with caution.

65% of SPR users are highly likely to recommend the SPR to a friend or colleague.

Source: SPR user interviews

² NPS®, Net Promoter® & Net Promoter® Score are registered trademarks of Satmetrix Systems, Inc., Bain & Company and Fred Reichheld.

Exhibit 3. SPR's Net Promoter Score



Promoters (9 or 10) are loyal enthusiasts and very likely to recommend the product or service.
Passives (7 or 8) are satisfied but unenthusiastic and can be easily lured by the competition.
Detractors (0 to 6) are unhappy customers and may voice their dissatisfaction to others.

SPR users are highly satisfied with the process

As highlighted in Exhibit 4 on the next page, all SPR users felt that CEP staff members were very effective in implementing the survey, addressing any staff concerns around confidentiality, and being helpful and responsive throughout the process. Respondents were satisfied with the level of survey customization, the balance of topics covered, and the amount of time it took to get the results. Overall, most respondents found the presentation and interactive online report to be very helpful, although these were two aspects of the SPR that a small number of respondents felt still have room for improvement.

“We probably got an inordinate amount of support from CEP...They gave us a tremendous amount of time and resources. It may have cost them more than we paid.”

- SPR User

Exhibit 4. User Satisfaction with Elements of the SPR

Element	Summary of Findings
Level of survey customization	SPR users felt that current level of survey customization is appropriate . Respondents appreciated the balance the SPR struck between having standardized questions across organizations, while still allowing them to add some of their own questions. As one respondent put it, “the more you heavily customize it, the more you lose the ability to benchmark in the sector.”
Turnaround time	All but one respondent indicated satisfaction with the turnaround time from survey administration to their receipt of the results, and most did not expect anything shorter than one month. The one respondent who noted dissatisfaction with the turnaround time said this would be among their only reservations about repeating the SPR.
Balance of topics covered in survey	Most users felt the emphasis of the survey on different topics was balanced appropriately . As one respondent expressed, “I thought it covered the whole range of the types of things that I’d want to know to be helpful to make improvements in our organization...They are all excellent questions and all the right areas that I would want to survey.”
Most helpful survey questions	Survey questions on internal communication and organizational culture were frequently mentioned by respondents when they were asked which were most helpful. This is likely due to the fact that these areas commonly required the most attention.
Survey implementation	All user interviewees reported SPR implementation went smoothly . “They did a really excellent job,” was a common answer. “They were very responsive, they kept us informed on the progress, and they were very client-oriented,” another respondent explained.
Confidentiality	All user interviewees indicated that CEP met or exceeded their expectations in minimizing any staff concerns about confidentiality during survey administration. “CEP provided a lot of sample communications that we could leverage,” a respondent noted.
CEP staff	All user interviewees reported that CEP staff members were very helpful and responsive from start to finish. “They’re great, they’re all smart, they all get it, they understand where you are coming from, they are very easy to work with,” a respondent explained. “They’re responsive and do what they say they’re going to do when they say they’re going to do it. They are helpful, quick to respond, and give realistic timelines,” another user commented.
Presentation	A high proportion of interviewees expressed satisfaction with the presentation . “Everyone [the CEO, the leadership team, as well as staff] has confidence in what they’re presenting,” a respondent explained. “They’re very competent in answering questions we might have. They are just so professional and fact-based,” s/he added. However, two respondents indicated that their presentations were “too descriptive” and did not provide insights beyond what was included in the report.
Interactive online report	Most respondents who used the online report found it very helpful and said the charts and navigation were clear . As one of them explained, “We were able to sort it by [department, seniority, and level].” That was really, really helpful when we needed to dig a little bit more.” However, a few respondents said they did not use it as much as they could have and one found it too “overwhelming” and noted that s/he prefers to review data offline.

What Impact Did the SPR Have for Users?

When asked to what extent their organization used the SPR to make organizational changes, nearly all interviewees responded emphatically that they had made significant changes. A few noted that doing otherwise would have been counterproductive. “We wouldn’t do the survey unless we would make changes or act upon recommendations. And staff expects that too,” said one interviewee. The most common areas of change that interviewees discussed centered on themes of organizational culture and internal communication, diversity and inclusion, and professional development. This section highlights some of the concrete steps individual SPR users took and the range of effects they described.

“This is absolutely the most important thing you can do as an organization to move forward.”

- SPR User

Improvements to internal communication and organizational culture

Within the broad areas of organizational culture and internal communication, respondents noted progress in empowering staff to ask questions and raise concerns, increasing the sense of connectedness within the foundation, articulating the organization’s cultural pillars, making necessary personnel changes, and improving supervisor-supervisee relationships. While each foundation is at different stages in the process, most respondents expressed satisfaction with the level of progress their organizations have made and many conveyed an appreciation that “the culture is not fixed overnight - it takes a long time.”

Case Example: Building a More Connected Culture

- **SPR Findings.** One organization’s ratings were relatively low for internal communication, both among staff and between staff and board members.
- **How Findings Were Used.** With input from CEP on best practices from other organizations, the foundation set up a committee of employees with representatives from all levels and departments to come up with specific action items. To help improve the flow of information and build a more connected culture, the foundation implemented 15-minute stand-up meetings following board meetings, started providing lunch to all staff on trustee meeting days, and opened program officer meetings to all staff.
- **Impact on the Organization.** The stand-up meetings have been extremely popular with staff, and have helped staff to feel more connected and in the loop. Opening up program officer meetings demystified their work.

Articulating the organization’s cultural pillars and boosting morale

Some foundations that wish to explore the issues that surface in the SPR more deeply have benefited from additional advisory support to help implement changes and maintain focus. As one respondent noted, “Trying to come up with meaningful action steps around a topic such as communication was difficult for us.” Another SPR user facing challenges in the areas of communication and organizational culture engaged organizational development consultants that specialize in those topics to help them make changes. “We got the results back in April but we worked from June until the following April on the results in terms of prioritizing, making sense of it, and moving forward with new policies, procedures, and training, so it was a long process in that regard,” one

of the respondents explained. Her colleague further described, “Without the [SPR] tool, it would have been difficult to have the frank conversations that were broad enough to surface more global concerns or issues, and so in that way, it was very useful.” S/he said they went through a process of identifying and articulating cultural pillars within the organization “as a direct result of the survey.” S/he added, “[With] the tone and the tenor within the organization, we’re in a much better place. I wouldn’t say that we were under any particular duress, but I certainly feel that morale overall has improved in response to these efforts.”

Changing personnel

A few respondents discussed how the SPR findings related to dissatisfied employees ultimately led to personnel changes that effected positive change in organizational culture. As one of them expressed, “The report along with some other sources of information helped create the momentum necessary to deal with some personnel changes at the highest level. Having the data and getting comments from staff helped us to eventually turn a corner on some changes at the leadership level that needed to happen.”

Case Example: Changing Personnel

- **SPR Findings.** SPR results made it clear to one organization that a few employees were destructive to their work environment.
- **How Findings Were Used.** The survey was “a call to action,” the CEO explained. “Staff wanted me to be more aggressive in terms of getting rid of people who were causing problems. As a leader, you think you don’t want to fire people because people will be upset, but it’s quite the opposite.” Among other changes, the foundation hired a new director of human resources to help address the issues raised in the SPR.
- **Impact on the Organization.** “Clearly it had a huge impact because that was my main goal for the first couple years I was here [in terms of fixing things],” the Human Resources Director reported. A follow-up SPR conducted two years later showed substantial improvement. “The surveys were hugely important because they told us what we should focus on and we did.”

Empowering staff to ask questions and raise concerns

One CEO explained that when s/he started, the foundation had a culture where staff did not feel comfortable sharing concerns. “Our goal has been that the survey would help us be a lot more open in the way we talk about things and that over time, we would build comfort at the staff level with being able to raise things in staff meetings. We were trying to build a sense of transparency and self-examination and emphasizing to people that it was okay for them to speak up, that part of being a staff member [meant] that it was your responsibility to ask questions and raise concerns.” The SPR provided a starting point for discussions about cultural change, and the CEO noted the organization ultimately made many changes as a result of the findings. “The hardest thing for us was there was a staff notion that leadership is responsible for the culture and so if we had concerns about it or if we’re not happy with it, it’s something that leadership needs to fix. And so the survey really helped us convey, ‘Look, we own that and we believe that culture starts at the top, but every person who is a member of this organization owns that as well, and so if you don’t speak up, if you don’t hold each other accountable to the culture that you want to be part of, then we can’t change it.’ And so by engaging them in that process, it really helped.”

“We came up with about a half a dozen things that we did differently as a result of the SPR.”

- SPR User

Improving diversity and inclusion practices

Respondents from six organizations noted that diversity and inclusion are among their most important values and, as a result, at least four of these foundations added questions in the SPR to measure progress in these areas. “One of the things that was really important to [our foundation] was a sense of progress around our commitment to racial equity, diversity and inclusion,” an interviewee reported. In the words of another respondent, “It gave us more substantive feedback about staff perceptions [on diversity and inclusion] so we could add that to the training we were engaged in and develop activities appropriately based upon staff feedback.”

“As a CEO, I’m very gratified and grateful for the CEP results. The survey is focused and has given me real empirically supported evidence, not just anecdotes [as I work to build a more effective organization]. Because of how they presented the summary and areas for improvement, it was in some ways a start to a workplan for an HR strategy.”

- SPR User

Greater support for professional development

One SPR user received clear feedback about a lack of support for staff professional development. CEP recommended the organization strengthen its capacity in this area, which it has done by hiring a specialist. Another SPR user reported that trustees questioned the large amount of time and resources being invested in professional development relative to other foundations. S/he said the leadership team was able to use SPR data to demonstrate how ensuring staff operated with the most current knowledge was increasing organizational effectiveness. “The survey gave us data to bring to trustees to justify our operations,” s/he said.

Feedback on SPR Survey Content and Presentation of Results

SPR users were invited to provide feedback on all aspects of the SPR. A majority of respondents explained that they were very satisfied and had few, if any, changes to suggest. A small number of respondents, primarily those less likely to recommend the SPR to a friend or colleague, provided the bulk of the feedback. Seventeen of the 21 SPR users or former users (81 percent) made at least one suggestion. The following is a summary of responses organized by topic areas most frequently mentioned. Comments about specific survey questions and analysis choices appear in the Appendix.

SPR focus and framing (n=4)

Four interviewees representing three of the user organizations and two of the non-user organizations raised concerns about the survey’s focus and/or how it is framed. Three of these respondents (14 percent of all users), felt that the SPR is more focused on staff satisfaction than “employee engagement, and said they would consider other tools as a result. Since the distinction between employee satisfaction, empowerment, and engagement is often blurred, Harder+Company asked these individuals for clarification. Below are the responses of interviewees from two foundations:

- *“It’s much more of a satisfaction survey and what I missed were some indicators that really measure how much effort people put into their work, how much passion they have about it, how they talk about the Foundation in the outside world, do they recommend people to come work here, how often do they think about leaving—things like that that really get to how engaged they are, and there were some, but not many of those, in the questions.”*

- *“I’m not sure if satisfaction is what we should be targeting versus how engaged are you in your career, and how [the foundation] can support you in that—how engaged are you in the strategies, do you have what you need to be successful, and how can you help to create the work environment that you want within the organization, and how engaged are you in that... what are you doing to help create your own satisfaction within the organization?”*

One of these individuals noted that the SPR focus on engagement was a topic at a recent meeting of a network of human resources professionals from large foundations. This is consistent with a trend in the field of human resources to look beyond satisfaction to focus more on engaging employees holistically in their work.

Recommendations section of the SPR (n=4)

Nearly one-fifth of users (19 percent) expressed that CEP could have provided better direction on how to address the issues that were identified through the survey or provided examples of best practices from high-performing organizations in areas where they were weak, although two of them were uncertain how much was fair to expect. As one respondent commented, “Having that first meeting when they just presented and answered questions - more defining terms, defining what the bars mean, that’s always really helpful. [But in terms of]

what one does then to take it to the next step, that’s where CEP was not very useful to us, and again, I’m not sure we should expect them to be.” Another respondent noted that s/he uses an Adaptive Action thought model, “[which is] really simple: ‘What? So what? Now What?’ Applying that to the staff survey results, CEP does a fine job about ‘What?’” However, s/he felt that CEP is not in a position to be a resource for the “Now What” piece: “So here are the results, what are you going to do with that?”

Among SPR users and former users:

- **24% suggested clearer or more streamlined data presentation (n=5)**
- **19% suggested more direction or examples around recommendations (n=4)**
- **14% requested more questions that address ‘engagement’ (n=3)**

Source: SPR user interviews (n=21)

SPR data presentation and reporting

Some respondents provided feedback on the format and presentation of data within the

SPR, and offered some suggestions for improvement in these areas. These findings are summarized below.

Data presentation could be clearer or more streamlined (n=5). The SPR includes at least 36 questions for most users. For those repeating the survey, the SPR includes trend data on key variables. Many users also receive benchmark data from their peers. While most respondents conveyed how much they appreciate the breadth of the SPR and greatly value the comparison data, three respondents noted that the volume of data it produces can be **overwhelming**. One respondent who used the SPR prior to the introduction of the online report said s/he got lost in the data and suggested improvements to the presentation of the results could help address this. “I find this format of doing prose like this in PowerPoint is so hard to read, [because it’s] small font, it’s dense, and there’s no formatting to it to really hone in.”

Another respondent who used the old paper-based version of the SPR (but also the online version of the GPR) noted that it takes a while to understand the charts that show the average ratings including medians and percentiles. However, “once you get it, it’s helpful,” s/he added. One recent user found the data presentation **confusing** because s/he said that the scales used in reporting were inconsistent across questions, so it was hard to follow the trend over time. “It’s the same problem as the GPR. They telescope the answers so you can’t compare against questions because it’s different. Some of the scales are four to six and some are three to seven. You can’t get a sense of the pattern easily. They give you your own paths and your peers get their own paths. There’s a lot of inconsistency.”

According to one interviewee (who had access to the online version), the data presentation was **misleading** in some cases. “The scale itself and the way the information was presented made it sometimes look as if the difference between what we were reporting and other organizations—us compared to other organizations—was huge, and in reality...this is basically saying that everybody reported that this was ‘good’ or ‘very good.’”

There could be more mindfulness of the context (n=3). Three respondents (14 percent) suggested that in reporting the data, CEP could have been more mindful of other things happening in the institution that affect the framing, the results, and recommendations. One SPR user noted that the results from an SPR they conducted at the beginning of a leadership transition were much more positive than those of an SPR that was conducted at the tail end of a very long transition and restructuring. “The major issue is in the interpretation and understanding the context, and although that was certainly acknowledged, it was more acknowledged and then ‘here are the results and the comparisons,’ but of course that doesn’t get incorporated into the results per se, so that’s a bit of a challenge,” another respondent observed. “It’s more a matter of how to incorporate the fact that when the survey is done does have a significant influence on the results,” s/he added.

Comparative data are not applicable (n=3). While most respondents identified the comparative data as the aspect they valued most, three respondents (14 percent) reported the data to be inapplicable. Two interviewees expressed a desire to compare their findings to a cohort of organizations that were more similar to theirs and hoped that CEP will be able to increase the number of various foundation types in the dataset. Another respondent questioned whether organizational cultures can be reasonably compared. “If you have seen one workplace culture perhaps you’ve seen one, and we strive for different things,” s/he said.

Use care in selection and use of quotes (n=2). Two interviewees (10 percent) reported that negative comments from staff that CEP included in the report became a distraction. “In some cases, my CEO would say, ‘Well, how many people said this, and why did they choose to report that in there, why was that worthy of being included for all staff to read?’” one of them shared. “Be really, really careful about the quotes and the themes and if it is a one-off, say one person said [that], or give the ‘n’ behind comments, because it wastes a lot of management’s attention. We get defensive about it.”

Content of the SPR

Some respondents provided general feedback on survey content, as summarized below. (The Appendix provides more detail on users’ feedback on specific questions.)

The questionnaire does not answer the ‘why’ questions (n=2). Two respondents (10 percent) noted some mild frustration with the inability of the survey to answer the ‘why’ questions, although one of them acknowledged s/he recognized the need to first develop a good understanding of ‘what’ is happening. “The only thing anyone who goes through the survey would like is to know the why’s. And those types of questions are not on here. For example, for the question ‘Do you feel like you have the ability to use your skills?’ If you get a low score, you

are dying to know why that’s the case. But I understand the reason that the survey can’t get to the ‘why’ questions.” This respondent noted s/he created a 10-day committee to come up with answers to ‘why’ wherever the organization rated low to help translate problems into solutions. S/he said that through this strategy, “staff felt respected and felt ownership of the improvements.”

Consider whether there are enough survey questions about diversity and inclusion (n=1). A respondent from one foundation (5 percent) said these themes warrant more attention in philanthropy and wondered about the extent to which they are addressed in the SPR. “I don’t recall offhand whether they have questions that probe about staff of color, LGBT staff, and if they feel comfortable expressing their points of view. And do they feel like they’re being tokenized? Those kinds of things would be big themes for the field.” Respondents from four other foundations noted they added custom survey questions to address diversity and inclusion but they did not indicate whether they felt CEP should standardize them.

SPR Non-User Insight

Five of the six non-SPR user organizations will not consider using the SPR in the future, according to interviewees. They are satisfied with the alternative they chose, and two noted they do not want to hinder their ability to make year to year comparisons. The remaining non-user is a former subscriber who does intend to use the SPR again in the future. Exhibit 5 below presents the primary and secondary reasons non-users chose a different tool.

Exhibit 5. Reasons Non-Users Chose Different Tools

	Consideration	Summary of reason
	Cross-sector benchmarking	The ability to benchmark was a very important consideration for most of the non-users. However, three of them were interested in cross-sector benchmarking, so this was a primary reason they chose an alternative survey provider.
	Cost	Cost was a primary factor for two other non-users and a secondary factor for a third respondent.
	Customization	One non-user wanted an extreme level of customization – far beyond what CEP could be expected to offer.
	Focus on employee engagement	A desire for a greater focus on employee engagement was a key consideration for at least one non-user.
	Organizational developmental issues	The primary issue for the remaining non-user was a desire for what they said was much more depth, experience, and capacity around organizational development issues. “They are brilliant at their core strategy which is about grantee perception,” s/he said. “I think there are a lot of good staff survey tools where that’s the focus of that organization and that if CEP really wanted to be in that space they would need to be much more robust and knowledgeable relevant to employee issues.”

Exhibit 6 presents the alternatives non-users ultimately selected along with other tools that were considered.

Exhibit 6. Other Tools Considered and/or Selected by Non-SPR Users

Alternatives selected	Other tools considered
<ul style="list-style-type: none"> ■ Best place to work survey sponsored by local business journals ■ PeopleMetrics and IBM ■ Great Place to Work ■ CustomInsight ■ Tool developed internally 	<ul style="list-style-type: none"> ■ Gallup ■ HR Leadership Council tool ■ CCAT ■ Local firms

Obstacles to Attracting New SPR Users

The results of this assessment are largely encouraging. As noted above, only a small proportion of SPR users provided most of the feedback. At least three-quarters of users plan to use the SPR again, and close to two-thirds are very or extremely likely to recommend the SPR to a colleague or friend. Given the high level of SPR user satisfaction, there must be other reasons to explain why the number of users has remained relatively small. There are a variety of challenges that CEP faces in attracting new SPR users and therefore expectations for growth should be realistic. The obstacles presented below are based on Harder+Company’s observations as well as respondent feedback.

Obstacles to attracting new SPR users include:

- | | | |
|---------------------------|---|---|
| Small target market | Readiness |  |
| Competitive space | Concerns about timing | |
| Cost | Momentum | |
| Exposing sensitive issues | Value placed on examining employee issues | |

- **The SPR’s target market is very small.** The first obstacle is that the pool of potential subscribers is small. Around 95 percent of staffed foundations are not eligible to use the SPR because they have fewer than 15 staff members. There are only about 200 independent, corporate, and community foundations in the U.S. that have over 15 staff members (i.e., the SPR target market) according to Foundation Center data. (This pool increases when adding United Ways and large public charities that engage in grantmaking.) Data are not available on how many of these foundations conduct employee surveys, but interviewees from a few very large, prominent foundations noted that their organizations had never done an employee survey prior to the SPR. In fact, one did not have a human resources department until recently despite having nearly a century in existence. Data from this set of interviews suggest that large foundations that conduct them do so every two to three years at most.
- **The employee survey market is a very competitive space.** Foundations have the option to do their own surveys internally or they have many attractive external options including specialists whose core strategy is employee engagement or organizational development more broadly. Some of these specialists offer features that CEP cannot match, such as cross sector benchmarking, 360 degree feedback, and/or consulting support.

- **Attractive options are available at similar or lower cost.** According to non-user respondents, Great Place to Work is similar in cost to the SPR and there are lower cost options available including CustomInsight or surveys developed internally. Two SPRs users and three non-users raised cost as an obstacle.
- **The SPR examines sensitive internal issues.** Leaders may be reluctant to survey employees simply because they fear what may be revealed. Non-users did not reveal anything that would suggest that they chose vendors from outside the sector or conducted the survey internally because they sought greater privacy, but this could be an unstated consideration.
- **The leadership team may not be ready.** Employee surveys take time and preparation. Readiness is essential and leadership has to be prepared to act on the results; otherwise, it can be more detrimental than not having done it all. Users must also be realistic about the amount of time and resources necessary to bring about change. As one respondent noted, when the organization was in the midst of making changes that resulted from SPR findings, “At one point people said, ‘Aren’t we done with this yet?’ But you don’t really get done with it.”
- **Users are concerned about getting the timing “just right.”** It can be challenging for foundations to find the “right” time to conduct their survey in part because of the amount of time and preparation required, but also due to the belief that if they are transparent with the findings, there are periods when “it can be unhelpful or misinterpreted.” Some of the respondents noted that they try to avoid surveying during periods of upheaval and change or they want to allow enough time to determine if improvements have been successful before conducting a follow-up survey. CEP can certainly try to address this by noting the advantages of having the SPR become a routine.
- **It takes time to build momentum.** User views on the value of the comparative data were mixed when CEP assessed the SPR in 2008. Now that more years have passed, CEP has been able to enhance its database and it is starting to pay off. Peer benchmarking is what attracts users and also what many value most about the SPR. As one respondent noted, “The more foundations they have in their sample, the more useful the data will be.”
- **Foundation leaders may not appreciate the value or need to examine employee issues.** As CEP highlighted in its 2012 report, “Employee Empowerment,” little effort has been made to study foundation staff experiences, possibly because foundation jobs are viewed as particularly ideal. Two respondents, both CEOs, provided comments to support this idea, noting there is much less for foundation employees to be dissatisfied about relative to other jobs. “In a foundation environment, it’s easy to overlook personnel problems because it’s an easy place to be,” one of them remarked.

Despite these obstacles, the SPR clearly has had a positive impact on participating organizations. Its track record of success, along with its competitive advantages of experience with grantmakers and funder-specific comparative data, validate its marketplace potential. Therefore, the recommendations in the next section focus on how CEP can increase the value of this tool to existing users and attract new clients.

Recommendations

This section summarizes the main recommendations that emerge from respondents' feedback on the SPR, related to the two primary goals of the assessment (increasing both the effectiveness of the tool and its sustainability).

Address the desire for more questions around “engagement”

CEP will likely have to add to more questions focused on “engagement” to keep three of its current subscriber organizations from considering alternatives. Three interviewees at these foundations emphasized they would like more measures of how committed and energized employees are about their jobs and how passionate they are about the organization. One of these respondents said s/he has studied the concept in some depth and is interested in seeing CEP build in more dimensions around (1) **effort**, or what makes employees go the extra mile and invest in their work in a deep, committed way; (2) **advocacy**, or what makes employees passionate about and advocates for the organization, which is essential in a mission-driven environment; and (3) **retention**, or what it takes to keep talented and motivated employees in the organization. While adding more questions in these areas may be insufficient to expand the SPR's user base, they should help maintain the current subscribership level and increase satisfaction and positive buzz about the tool.

Increase thought leadership and communication

To attract more users, CEP could elevate employee work experience issues for the sector as a whole. CEP's President and Vice Presidents might consider the value of engaging in more thought leadership on the topic as a way of increasing or creating demand for the SPR, perhaps by showcasing positive impacts of the tool highlighted by users who participated in this study. It will be important to help foundation leaders understand how employee empowerment, engagement, and satisfaction strengthen foundations so they can achieve greater impact. CEP produced a research report on employee satisfaction in 2012 which was accompanied by a series of blog posts and a conference session, but those messages will need to continue and come from CEP's senior leaders. CEP could consider translating the knowledge into applicable tools, planning the dissemination over a long time frame, and recruiting other opinion leaders to help with knowledge creation and dissemination.

“[CEP's President and Vice President] need to do the education of leaders about why this matters... You don't just show up every two years to do a survey. You use the data, you write about it more, you have ongoing dialogue with CEOs and HR directors about this survey. If there's one area CEP could invest more in, it's the communication strategy and thought leadership around these issues, of how paying attention to these issues can benefit organizations.”

- SPR user

Reexamine SPR links with the GPR

In recent years, CEP has added a few questions into the SPR that directly overlap with questions in the GPR to enable direct comparisons of staff and grantee perspectives. Interview responses of SPR users who raised the subject were mixed. Three respondents noted that the comparison was or could be quite helpful, particularly when the surveys are conducted simultaneously. However, six respondents questioned the value of asking staff

for their perspectives on their interactions and relationships with grantees, especially (as two of them highlighted) if the side by side analysis is not performed. This set of SPR questions may be better left as optional; CEP can also consider offering the comparative analysis for an additional cost.

Adding a pulse survey as an option could enhance the SPR

Over three-quarters of those asked about the option of having a shorter, periodic pulse survey expressed interest in such a survey. As one of them explained, “We’re taking their key recommendations and we’re working on some changes and that’s why we want to do a pulse survey on those key recommendations at the end of this year.” Without this option, some have been creating their own pulse surveys internally to monitor progress. However, three interviewees cautioned that the timing, depth, and frequency will be tricky.

Consider ways to mitigate the costs of the SPR for users

Cost was as an issue for three non-users as well as two users. One user explained that the organization would use the SPR more regularly if it were less expensive. One possibility would be to *offer a scaled back/a la carte/non-customized SPR with caveats*. A few SPR users noted that CEP has been flexible and allowed them to opt out of the in-person presentation or to simply receive the raw, anonymized data. The caveat to this is that many SPR users need help with interpreting the results in part because they deal with sensitive internal issues. They have relied on CEP’s advice and connections with others in thinking about how to take this next step with their staff. Organizations that choose the scaled-back version after being made aware of the limitations may ultimately decide to engage CEP for further assistance.

CEP may also wish to *be more explicit about discounts that exist for users of multiple tools*. Respondents from two organizations that use multiple tools noted that they try to schedule on-site meetings with CEP concurrently to reduce costs but one of them wondered about the prospect of a discount. “I don’t know what their business model is, but for a nonprofit organization, it’s getting pretty steep,” s/he said.

Conclusion

The market for the SPR is more limited relative to the GPR, and the philanthropy field itself has not elevated the importance of foundation staff experiences. Despite these obstacles, more than 40 foundations have used the SPR over the past decade and CEP has built a large comparative dataset. Most of the recent SPR users interviewed as part of this assessment reported a high level of satisfaction and impact and indicated they are very likely to use the SPR again in the future. The SPR is clearly a valuable tool for the field. This assessment has identified ways that CEP might increase its attractiveness and value for existing and future users.

Appendix

Methods and Limitations

The target population for this assessment included CEOs and other senior leaders at 17 foundations that participated in the SPR from June 2012 through May 2014, as well as senior leaders at nine foundations that declined to use the SPR during that time period (a total of 26 foundations). Three of those nine foundations had also used the SPR previously. Within the target population, 11 foundations used CEP's online reporting system while six foundations used the previous version of paper-based reports.

Harder+Company contacted a total of 38 individuals representing 26 foundations to ask for their participation in a telephone interview. Four individuals had left the organizations, bringing the total number of eligible respondents to 34 individuals representing 24 foundations. Twenty four out of the 34 eligible individuals participated, resulting in an **overall response rate among individuals of 71 percent**. At least one individual participated from 21 out of the eligible 24 foundations. A breakdown of the response rates among individuals is presented in Exhibit 7.

Exhibit 7. Response Rates

Respondents	Response Rate
Overall	71%
SPR users - CEOs	46%
SPR users - human resources and other senior leaders	93%
Non-users (human resources leaders and other)	71%

Respondents were predominantly SPR users but also included individuals from six foundations that had considered using the SPR within the past two years but then ultimately declined, and instead used a different staff survey tool. As shown in Exhibit 8, six of the respondents were CEOs, 13 were human resources leaders, and five held other senior leadership roles. At four SPR-using foundations, Harder+Company interviewed two representatives (individually). Three of the non-users had used the SPR in the past and are treated as both SPR and non-users in this report. However, one of these individuals did not answer many of the user-specific questions due to time constraints and thus was excluded from the analysis of those responses.

Exhibit 8. Respondent Composition

Respondents	Count
Human resources leaders	13
CEOs	6
Other senior leaders	5
Total	24

One of the **limitations** of this assessment is the potential for **non-response bias**, which is the possibility that the views of respondents may differ from those who chose not to participate. This bias must be considered particularly when the response rate is low, as it was in the case of the CEOs. Some of the CEOs who declined explained that they felt that one representative from their foundation (e.g., the human resources leader) would be sufficient, and/or that their organization had already provided feedback on the SPR to CEP directly.

In some cases a year or more had passed since the SPR had been completed which increased the possibility for **recall bias**, which is simply the potential for respondents to give inaccurate information due to imperfect memories. Despite these limitations, we believe the data presented in this report provide important insight into the usefulness and impact of the SPR.

Feedback on Specific SPR Survey Questions

Survey Questions*	User Feedback
Q18-19, 22-25 - Grantmaking and grantee interactions (n=6)	Six users felt these questions were less relevant or not useful. Two expressed dissatisfaction that staff members who are only tangentially involved in grantmaking answered these questions.
Q3 - Overall, how would you describe your workload ? (n=3)	"No one is going to say they have too little."
Q31 - My pay is fair, compared to that of people in similar jobs at other organizations. (n=1)	"Are people going to say they're highly overpaid?"
Q10b - Effectively manages the flow of information between board and staff (n=1)	"A lot of people said they entered '4' [neither agree nor disagree] because they don't have any interaction with the board."
Q13 - To what extent do you believe you are working toward the same goals as the Trustees/Board of Directors ? (n=1)	"Staff shouldn't have worry about that. In fact, as a CEO, I don't want my employees thinking about that. They should worry about alignment with the CEO."
Q4 - At this point in time, what is the one word that best describes the Foundation? (n=1)	"We like word clouds just as much as the next person, but it just wasn't particularly useful."
Q6b -Management communicates a clear direction for the future. (n=1)	"We were rattled because it was lower than we wanted. But then who is 'management'? What does that mean? You can't be more specific though without singling people out."
Q32 - Overall, how satisfied are you with the employee benefits provided by the Foundation? (n=1)	"We know where we land within the industry, and if you're at the top of your industry and [staff] is not satisfied, what more can you do? So why even move into that?"
Q10h Foundation is respectful of staff of different races, genders and backgrounds (n=1)	"The more important question [is] how do you encourage participation and inclusion from staff at all levels...So it's <i>how</i> do we work with employees..."

*Note: the question wording above is taken from the generic instrument CEP shared with Harder+Company. It is possible CEP has made changes to survey questions in the time since respondents used the SPR.

Feedback on Specific Design and Analysis Choices

Design and Analysis Choices	User Feedback
Age of peer benchmark data (n=2)	Two respondents commented that the peer benchmark data seemed to include responses more than three years old.
Treatment of professional positions (n=1)	"CEP needs to change the way it counts professional positions or at least separate out for program officers ... There was a strong sense in my organization, particularly with the program officers or grantmakers, that we not count all of the exempt higher-level professional positions."
Questions 15-17 on how well the Foundation understands the fields and communities in which it operates, and the strategies and goals of the organizations that it funds (n=1)	One user felt that aggregating data on these questions provided misleading information because responses would vary by program area.
Question scaling (n=1)	Review questions that do not include "don't know" as an option - "people interpret 'neither agree nor disagree' as 'I don't know.'" This was a major concern of one respondent.