

**Introduction**

As part of the Foundation’s commitment to organizational learning, the Charles and Helen Schwab Foundation invited 50 organizations who have received funding from the Foundation in the past year to participate in our Partner Perception Assessment. The purpose of the assessment was to assess the extent to which the Foundation is demonstrating its core values of collaboration, responsiveness, effectiveness and impact measurement. The following report is a summary of the feedback we received.

**Survey Methods**

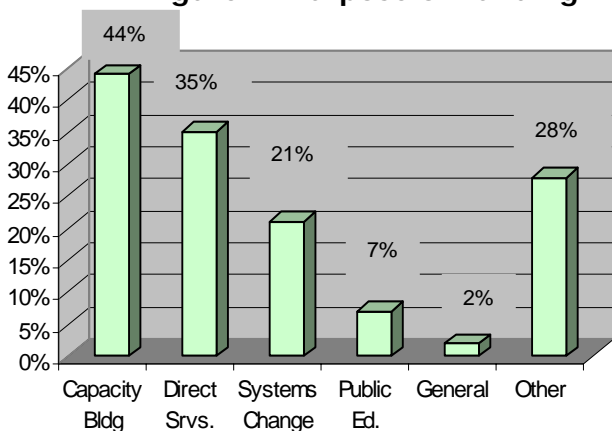
All organizations (partners) that received funding from CHSF after July 1, 2002 were invited to take part in the web-based Partner Perception Assessment. The assessment included 42 questions and was intended to take no more than 15 minutes. Partners were given from September 17, 2003 to October 1, 2003 to complete the survey, a span of two weeks. The response rate was exceptional at 86%, with 43 out of the 50 partners responding. Responses were anonymous.

**Description of Respondents**

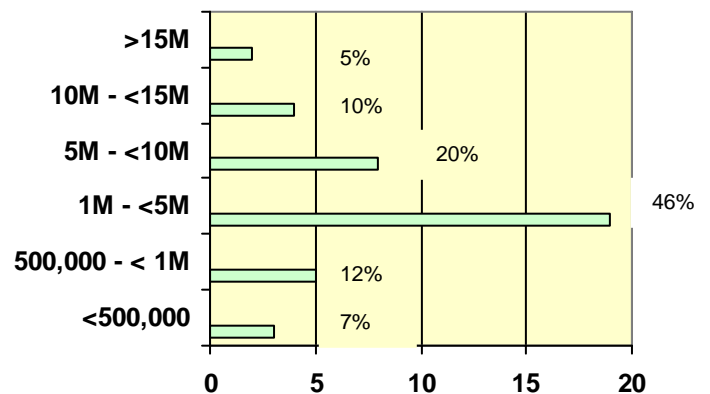
**Overall we received feedback from a representative group of our partners.** The types of organizations that responded were fairly evenly distributed over the three program areas: substance abuse (33%), homelessness (37%) and poverty prevention (30%).

Organizational capacity building was the most common category of funding (44%), followed by Direct Services (35%) and Systems Change (21%) (Figure 1). Nearly half of these respondents were Executive Directors. Of the responding organizations one-third primarily served San Mateo County and another 25% served San Francisco County. The remainder served Santa Clara, Marin, Napa, Solano and Contra Costa counties, as well as the Bay Area, State and National. The majority of organizations reported serving family, youth and children. Most organizations that responded had annual operating budgets between \$1 million and \$10 million (Figure 2).

**Figure 1: Purpose of Funding**



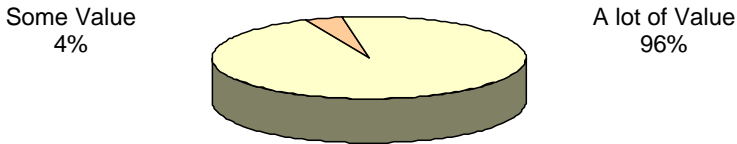
**Figure 2: Operating Budgets**



### Participation in CHSF Initiatives

**Participation in a funding initiative adds value.** Almost two-thirds (65%) of respondents reported participating in a specific CHSF initiative such as BEST, Family Permanent Supportive Housing or Housing First. All of these organizations stated that this participation has added value to their organization (Figure 3).

**Figure 3: Reported Value Added to Organizations**



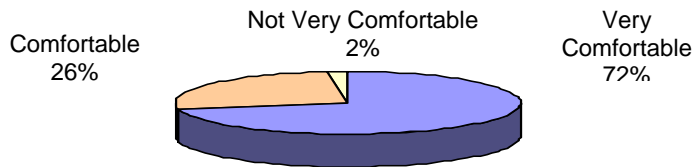
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### Foundation's Effectiveness in Demonstrating Partner Collaboration

In order to assess the Foundation's demonstration of partner collaboration, respondents were asked a series of questions about how they perceive Foundation staff in regard to comfort level and approachability during the introductory phase, application process and throughout the funding process.

**Overall, partners rated the Foundation highly with regard to collaboration.** Almost all respondents reported being very comfortable or comfortable approaching the Foundation (Figure 4). Ninety-eight percent reported having the opportunity to ask staff questions about the Foundation, Foundation program areas and/or the grant making process.

**Figure 4: Overall Comfort Level with Staff**



#### **Overall Partner Satisfaction**

- 98% are **very satisfied**
- 2% are **somewhat satisfied**

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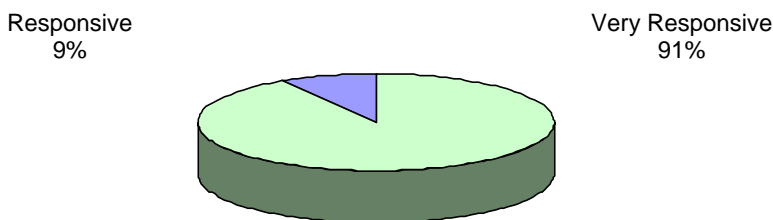
### Foundation's Effectiveness in Demonstrating Responsiveness and Flexibility

In order to assess the Foundation's demonstration of responsiveness and flexibility, respondents were asked questions regarding their frequency of contact with staff and the usefulness of the proposal process.

**All partners found the Foundation to be responsive or very responsive (Figure 5).**

Almost all respondents reported having direct contact with the Foundation during the initial engagement, either by phone or in person. The majority of partners found staff members very responsive (81%) and responsive (19%) to questions and concerns during the proposal stage. The Foundation received high marks on overall responsiveness as well, and this was true for each program area (Figure 5). In addition, most respondents found the proposal process to be useful.

**Figure 5: Overall Responsiveness of Staff**



100% of respondents found CHSF staff to be **very helpful** or **helpful** in providing feedback in the development of the proposal application.

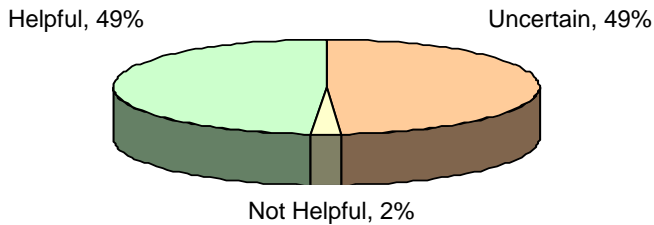
**Foundation’s Ability in Building Organizational Capacity and Effectiveness**

In order to assess the Foundation’s demonstration of building the organizational capacity of CHSF and their partners, respondents were asked their perceptions about the evaluation process and how CHSF could further support organizations in an attempt to maximize impact.

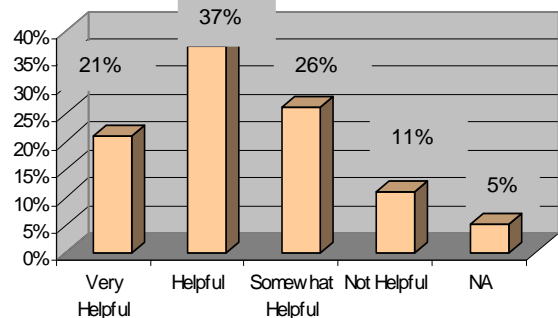
**Overall, evaluation was perceived to be helpful, but there is room for improvement.**

There were mixed reviews about the helpfulness of the evaluation process, with almost half reporting that the process was helpful, but another 49% uncertain about its utility.

**Figure 6  
Helpfulness of the Evaluation Process**



**Figure 7: External Evaluation  
44% reported External Evaluation**



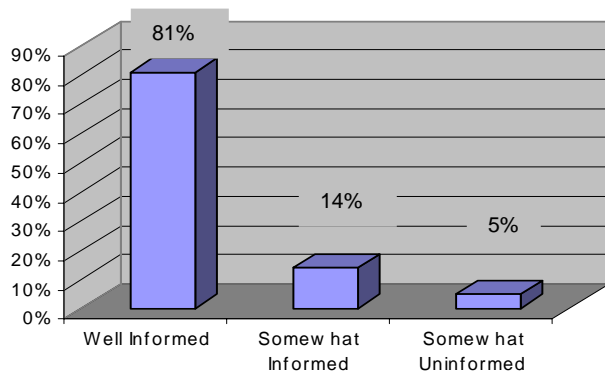
Of those participating in a Foundation-supported evaluation conducted by an outside evaluator, 58% found the experience very helpful or helpful (Figure 7). Over half the respondents spend less than 10 hours per month on evaluation related activities, while 12% spend more than 20 hours per month on these activities.

**Foundation’s Contribution of Knowledge to the Human Service, Philanthropic and Nonprofit Sectors**

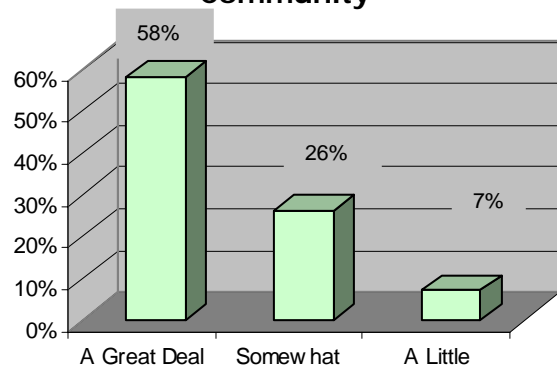
In order to assess the Foundation’s demonstration of knowledge sharing, partners were asked about their awareness and utilization of CHSF services. The majority of the partners (81%) reported that they had used the Foundation’s website and 67% reported receiving the news and research updates.

**Overall, partners perceive the Foundation to be knowledgeable about the fields in which the Foundation engages (Figure 8).** Partners were asked how they perceive the Foundation’s knowledge and understanding of the local community and the field in which they work. Eighty-one percent found the Foundation to be knowledgeable about the field in which it engages (Figure 8). In addition, respondents perceive the Foundation to have some understanding about the local community in which CHSF engages (Figure 9).

**Figure 8: Perceived Knowledge of Field**



**Figure 9: Perceived Understanding of Local Community**

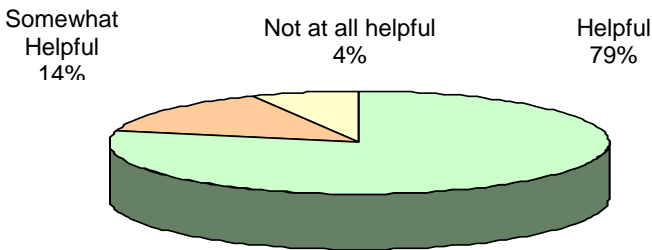


**Foundation’s Effectiveness in Measuring What Works and Why**

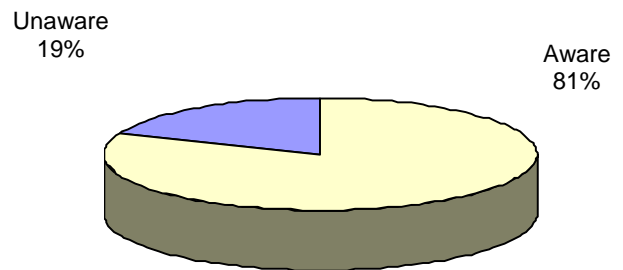
In order to assess the Foundation’s demonstration of impact measurement, respondents were asked about their awareness of the Foundation’s reporting requirements and their perceptions of the evaluations’ usefulness.

**There is generally good awareness among partners about reporting requirements, but there is room for improvement.** Partners were generally aware of Objective and Outcome Tables (98%) (Figure 10) and Annual and Final Reporting Guidelines (81%) (Figure 11). Reviews were mixed about the helpfulness of external evaluations. Of the 98% that were aware of the O & O Table, over three-quarters found them helpful.

**Figure 10**  
**Perceived Helpfulness of O & O Table**



**Figure 11**  
**Awareness of Reporting Guidelines**



**Suggestions from our Partners and Our Response**

Respondents were asked to share suggestions and comments about various aspects of the Foundation’s operations and activities. These are summarized below.

**Application and Funding Process:** Generally, perceptions about the application and funding process were positive and highlighted the high level of staff engagement and approachability during the process, indicating that the application process is satisfactory. It was suggested that the Foundation consider making the grant application available online. Several partners suggested that the Foundation increase its clarity about the amount available for individual grants, as well as the payment schedules. Respondents also made suggestions about the pace and amount of funding, requesting a better process of issuing checks under \$50,000 and a quicker disbursement of funds.

**CHSF Response:** The concerns of our partners are warranted. We have already modified our reporting guidelines and are working on ways to improve the timing and means by which we communicate these requirements for partners. We are also exploring the feasibility of online grant applications.

**Evaluation Process:** Regarding the Foundation’s evaluation process, respondents suggested that CHSF make explicit their expectations for evaluation at the beginning of the funding cycle.

A suggestion was also made to provide examples of successful evaluation programs implemented by past grantees. Regarding external evaluations, partners requested more regular involvement and communication with the evaluators.

**CHSF Response:** The Foundation appreciates the feedback partners have offered with regard to the evaluation process. In the coming year, we will be working on ways to improve the relevance of evaluation demands to the daily practices of our partners. We will also be working to assure that evaluation practices are respectful and responsive to our partners. Currently we are exploring ways in which to build evaluation capacity among our partners who could benefit.

**Leveraging and Organizational Learning:** Partners were interested in the Foundation taking a more visible and active role in the communities in which we work. Partners would like the Foundation to raise awareness and educate other community organizations and funders about best practices and funding opportunities in the field.

Likewise, partners would appreciate more learning opportunities, such as meeting with other organizations working in the same area and technical assistance.

**CHSF Response:** We plan to continue our investments in news and research updates, symposium, conferences and briefings in our priority areas. Partners are encouraged to subscribe to our free, weekly electronic news and research updates offered in the following areas: homelessness, substance abuse, poverty prevention and learning disabilities. To the extent possible, we will try to increase learning opportunities for partners. Additionally, we will continue our efforts to engage other funders in our program areas with the hope of bringing both attention and resources to these important issues.

### **Towards the Future**

Over the next few months we will be examining the feedback we received and identifying ways to improve our grant making program. We have already begun to make changes in our practices as noted above.

It is our intention to ask our partners each year about how well the Foundation is demonstrating its core values of collaboration, responsiveness, effectiveness and impact measurement. While the response to this first electronic survey exceeded our expectations, we acknowledge that a web-based survey is limited. The challenge for us in the future will be to balance the needs of our partners for ease and confidentiality, which the web-based approach accomplishes, with our need for greater breadth and depth of feedback. In the coming year we will be developing ways to gather more in-depth information from our partners. With better clarification about our partners' perceptions of the Foundation, we will be better able to build partnerships to improve lives.

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