

Introduction

As part of our commitment to organizational learning, the Charles and Helen Schwab Foundation invited our stakeholders — leaders from organizations with whom we have partnered since July 2001 — to participate in an assessment to gauge the extent to which the foundation is demonstrating its core values of capacity building, collaboration, impact measurement and knowledge sharing. This report is a summary of the feedback we received.

Survey Methods

The foundation's program officers were asked to create a list of partner organizations. These included other foundations, government agencies, nonprofit organizations and universities, as well as organizations that the foundation engaged in research activities. The Human Services team determined 70 organizations that were considered partners (stakeholders) of the foundation. The leaders of these organizations were invited to take part in a web-based Partner Assessment consisting of 12 questions. Partners were given from April 20 to May 3, 2003 to complete the survey. The response rate was 57% (40 respondents). Responses were anonymous.

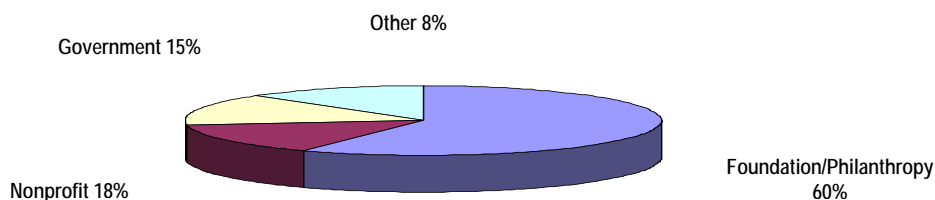
Interestingly, the Zoomerang survey tracking system indicated that there were 73 visits to the survey, indicating that many people at least reviewed the survey, even if they did not complete it. We conjecture that either the respondents or a delegate/assistant of the stakeholder was curious about the contents, and reviewed the survey ahead of time. (In comparison, in the survey of our grantees, the visit rate was almost the same as the actual number who took the survey.)

Description of Respondents

Respondents most commonly represented foundations or philanthropic organizations.

Sixty percent of respondents identified themselves as representatives of either a foundation or philanthropy. The next most common organizations represented were nonprofit organizations and government organizations. The remaining respondents selected "Other" and included: United Way, Homeless Coalition and a Consulting Business. There were no respondents representing For-Profit Organizations or University/Academia. See Figure 1 for percentages in each category.

Figure 1: Representative Organizations

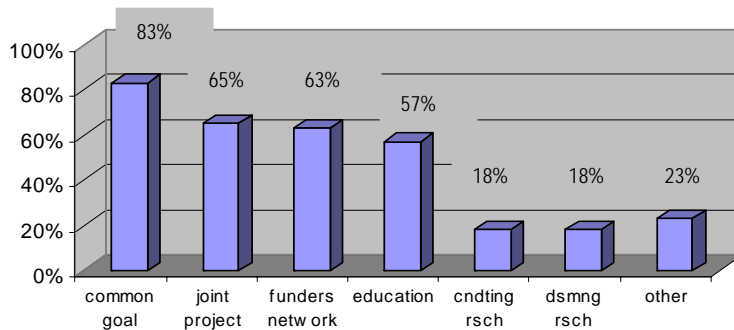


Foundation Activities Engaged In by Our Partners

The majority of respondents reported working toward a common goal with the Schwab Foundation (83%).

The second most common activity was co-funding or sponsoring a joint project, followed by an informal or formal funders' network. Other ways in which the stakeholders engaged with the foundation were educational activities (of other funders, government or nonprofit organizations), followed by research (conducting and disseminating). See Figure 2 for percentages in each category.

Figure 2: Activities in which Stakeholders Engaged With the Foundation

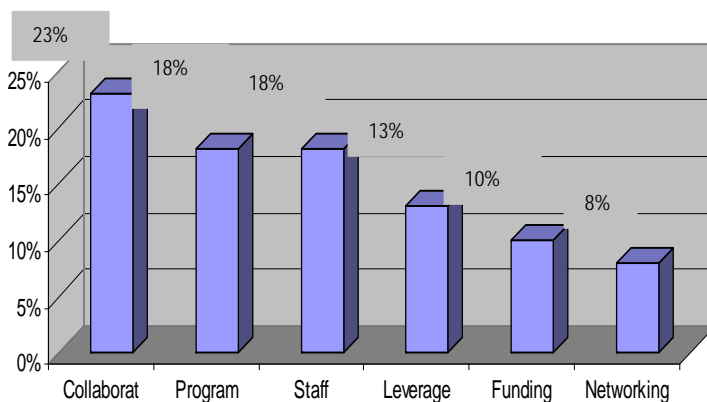


Value of Partnering/Networking with the Schwab Foundation

When asked what value was seen in partnering with the Schwab Foundation prior to beginning work with us, respondents found value in common interests, as well as respect for the foundation in the fields in which we work. However, responses varied depending on the type of organization answering.

Twenty-three percent of respondents saw a value in collaborating with like-minded funders and 18 percent referred to a specific program area. The next most common values were "great and informed" staff members, followed by an interest in leveraging knowledge and resources toward a common goal, future funding opportunities, and a perceived value in networking with the foundation. See Figure 3 for percentage breakdowns. Seventy percent of stakeholders believed these values were fully realized through the partnership.

Figure 3: Value of Partnering with the Schwab Foundation



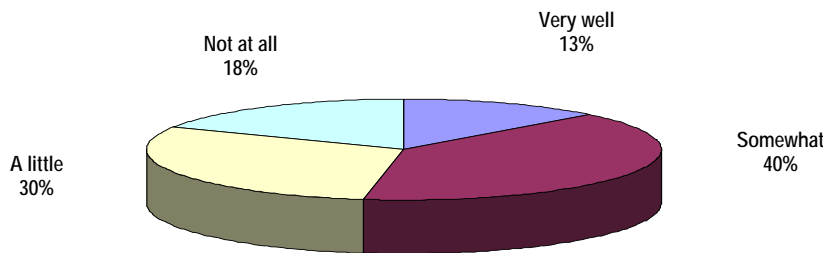
Were These Values Realized?

- 70% Realized Values Fully
- 25% Realized Values to Some Extent
- 5% Found it Too Early to Tell Values

Stakeholders' Understanding of the Schwab Foundation's Strategy

Most commonly, stakeholders reported having some understanding of the foundation's strategy prior to partnering with us, with 13 percent understanding the foundation's strategy very well, 40 percent somewhat understanding, 30 percent understanding a little and 18 percent not understanding at all. See Figure 4.

Figure 4: Stakeholders Understanding of Schwab Foundation Strategy Prior to Partnership



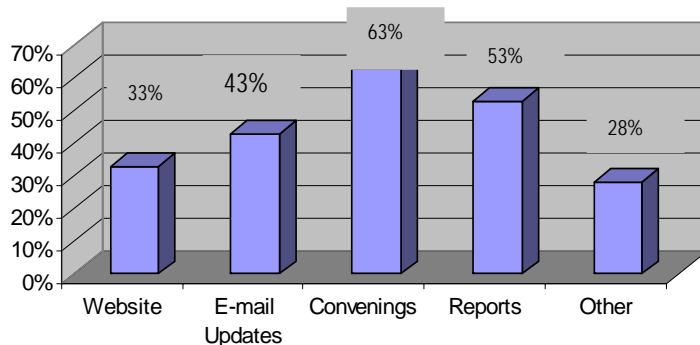
Schwab Foundation Services Used in Past Year

Partners have attended meetings or convenings organized by the foundation more than any other services offered.

Sixty-three percent of respondents reported taking part in a convening or meeting organized by the foundation. The next most common service used was a Schwab Foundation report or publication, followed by weekly e-mail new and research updates, and the Web site. See Figure 5 for percentage breakdowns.

Of the 28 percent selecting the Other category, responses included: collaborating with Schwab Foundation colleagues, working with program officers on specific programs, informal networking and meeting with other foundations jointly.

Figure 5: Services Used in Past Year

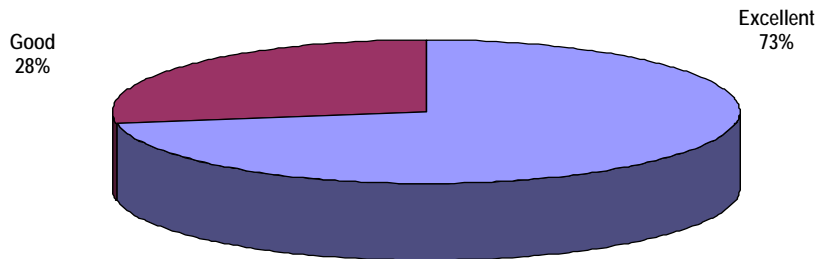


Responsiveness of the Schwab Foundation

Nearly three-quarters of the respondents rated the foundation as "excellent" in regard to responsiveness (73%). Of those respondents representing foundations, 87 percent reported "excellent responsiveness." The responsiveness rating declined slightly with nonprofit and government organizations, with 67 percent of both types of organizations

reporting “excellent responsiveness” from the foundation. The remaining 28 percent of total respondents rated the foundation as “good.” See Figure 6.

Figure 6: Schwab Foundation Responsiveness



Schwab Foundation’s Understanding of Partnership Areas

Most respondents perceived the foundation to have a good understanding of the areas in which they partnered (90%).

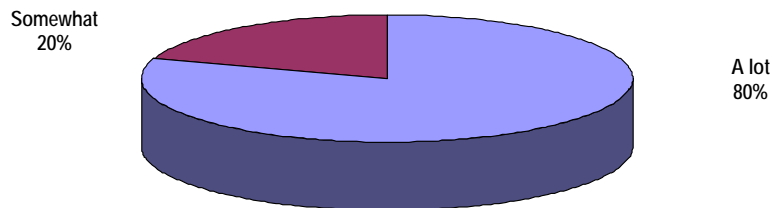
All nonprofit and government respondents and 87 percent of foundation and philanthropy respondents found the Schwab Foundation to possess a good understanding of the area in which it partnered. Only 10 percent reported that the foundation only “somewhat” understands the area in which it partnered.

Foundation’s Ability to Advance the State of Knowledge in the Areas of Partnership

Most respondents perceived the foundation to advance the state of knowledge “a lot” in the areas in which it partnered.

Seventy-four percent of foundation and philanthropy respondents and 83 percent of nonprofit respondents reported that the Schwab Foundation advances the state of knowledge in the partnership areas “a lot.” The remaining 20 percent of the respondents perceived the foundation to “somewhat” advance the state of knowledge in the areas in which it partnered. See Figure 7.

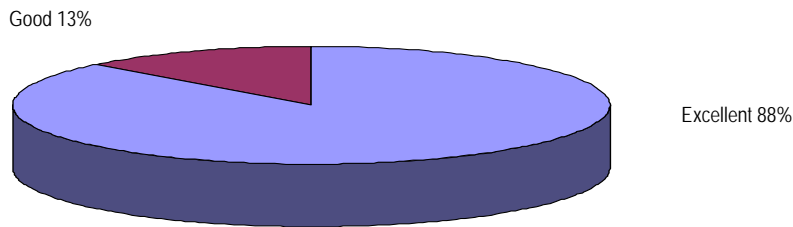
Figure 7: Ability to Advance State of Knowledge in Partnership Areas



Overall Partner Experience

Overall partners reported having a positive partnership experience with the Schwab Foundation. Eighty-eight percent of the responding partners reported having an “excellent” experience with the foundation. Thirteen percent reported having a “good” experience with the foundation.

Figure 8: Overall Experience



Schwab Foundation Descriptors

Respondents were asked to give three words that described our foundation. The most common words used to describe the foundation were “focused” (24%), “committed” (18%) and “collaborative” (15%). Eighteen percent of respondents used an action word such as “cutting-edge,” “visionary” or “forward thinking” to describe the foundation. Other words used included “engaged,” “leadership,” “supportive” and “involved.” Foundation staff was mentioned as being responsive, caring and true partners.

Recommendations for Improvement

While there was much variation in areas offered for improvement, 18 percent of respondents recommended that the foundation increase the amount of funding in a given area. Another 18 percent advised the foundation to continue to do the good work as it has been doing. Fourteen percent recommended expanding the geographic area in which the foundation grants funds, i.e., further goals to other counties and nationally.

Discussion

Limitations of Assessment Tool

This was the first assessment of our stakeholders’ perceptions of the foundation. Our own lack of experience in surveying the stakeholders resulted in a few methodological limitations. These limitations were brought to our attention by several respondents who contacted us directly. Some stakeholders indicated that several of the questions were not applicable to their relationship with us. Because we made almost all the questions mandatory to complete, the survey tool would not allow a respondent to submit their responses if any questions were left unanswered. Some stakeholders opened the survey, but found that some of the questions were not applicable to their relationship with us, and therefore did not complete the survey. Unfortunately, despite pilot testing the survey, we had not identified the need to include a “Not Applicable” category. As such, some respondents were unable to complete the survey.

Different Perceptions: Stakeholders versus Grantees

The objectives of these two Partner Perception Assessments were similar; however the target groups differed significantly. A few lessons can be learned by looking at the differences between the Partner Perception Assessment (PPA) of grantees and the Partner Assessment (PA) of stakeholders. First, the difference in response rates between the PPA conducted last year among the organizations the foundation funded and this PA is significant. The PPA response rate was 86 percent while the PA response rate was 57 percent. This variation in response rates could be explained by the difference in power dynamics: the PPA surveyed organizations which receive funds from the foundation,

whereas the PA surveyed organizations the foundation has worked with in the past and considered stakeholders.

Summary of Findings

Stakeholders generally perceived the Schwab Foundation to be knowledgeable about the areas in which it invests, as well as contributing to improvements in these areas. Stakeholders also describe the foundation in ways which are consistent with our values of being collaborative and committed to our program areas.

However, while the most common reason stakeholders worked with the foundation was around common goals, there were mixed perceptions about what the foundation's goals were.

Future assessments of our stakeholders' perceptions of the foundation should perhaps approach the assessment differently. First, our definition of stakeholder should be more clearly defined with regard to quality, intensity and duration of collaboration or partnership. Feedback we received from several respondents indicated that they did not perceive the partnership with the same strength as we had.

Other foundations (for example, the Robert Wood Johnson Foundation) contract with a third party consultant to conduct the assessment to increase objectivity and anonymity. (Our assessment was conducted with in-house resources.) These other surveys also identified comparable or competitive foundations to the one being benchmarked. Much like a market survey, respondents were not told which foundation, or specific "product," was being assessed, but were asked to compare the various foundations on selected indicators.

Overall, the perceptions of our stakeholders about the foundation were very positive. Like the findings from the survey of grantees, stakeholders found the Schwab Foundation to be a responsive partner, and partnering with us to be an excellent experience. For almost all respondents, their goals for the partnership were realized. We can conclude, even from this modest approach to tapping the perceptions of our stakeholders, that the foundation is practicing its essential values.