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**To:** Jennifer Teunon, Executive Director, Medina Foundation

**From:** Austin Long, Director – Assessment Tools, The Center for Effective Philanthropy  
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**Subject:** Key Findings and Recommendations from Medina Foundation  
2015 Grantee Perception Report

**Date:** September 25, 2015

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We are pleased to provide you with your 2015 Grantee Perception Report (GPR) for the Medina Foundation (“Medina” or “the Foundation”). We look forward to discussing the results of this survey of your grantees with you and your colleagues.

In May and June 2015, The Center for Effective Philanthropy (CEP) conducted a survey of the Medina’s grantees. The memo below outlines the key findings from Medina’s GPR as well as the methodology used to collect this feedback. CEP has included comments below that reference both positive and negative feedback from grantees. The proportion of negative or constructive comments in this narrative is over-represented relative the full set of grantee comments.

Assessing funder performance is challenging and a range of data sources is required. The GPR provides one set of perspectives that can be useful in understanding foundation performance and should be interpreted in light of Medina’s particular goals and strategy. The survey covers many areas in which grantees’ perceptions might be useful to your foundation. Medina should place emphasis on the areas covered according to your specific priorities. Low ratings in an area that is not core to your strategy may not be concerning.

## Overview

- Medina Foundation receives higher than typical ratings for most measures in this report, including perceptions of its impact on grantees’ fields, communities, and organizations.
- Medina grantees also rate the strength of their funder-grantee relationship more positively than grantees at most other funders in CEP’s dataset.
- While grantees indicate spending fewer hours than typical on grant processes, they also rate lower than typical for the helpfulness of the selection and reporting processes.
- Grantees at Medina report receiving less intensive forms of non-monetary assistance compared to grantees at the typical foundation.
- When asked for suggestions about how the Foundation can improve, the largest proportion of Medina grantees mention grant length, type, size, and improvements to the selection process.

## Impact on Grantees' Fields and Local Communities

Medina Foundation's grantees rate the Foundation's impact on their fields of work and local communities more positively than typical.

- Medina is rated in the top 25 percent of funders in CEP's dataset for its impact on and understanding of grantees' fields of work.
  - In addition, Medina is rated significantly higher than in 2006 for both measures.
  - Ratings from Education grantees trend lower than ratings from grantees in other program areas.
- The Foundation is rated similar to the typical funder for its effect on public policy and the extent to which it advances knowledges in grantees' fields.
- Grantees rate the Foundation's impact on their local communities in the top 25 percent of funders and significantly higher than in 2006.
  - Grantees give typical ratings for the Foundation's understanding of their local communities.
- In comments, grantees describe the Foundation as "a great leader in our community" and "smart in that they do not presume to understand the needs of the community...but instead approach them with a servant's attitude to listen, hear, and respond accordingly."
- **Recommendation:** *Medina should identify which aspects of its approach have facilitated a strong impact on grantees' fields and communities, and determine whether it is a goal to further improve areas such as advancement of knowledge in the field or understanding of grantees' local communities.*



*"The Medina Foundation collaborates closely with both public and private funders throughout the region. Their board and staff remain up to date on systems change initiatives and emerging best practices across a very broad range of human and social services, and seek out opportunities to share information with organizations that they fund."*



*"Medina Foundation seems to have set broad funding priorities, which is appreciated as the needs of our community are broad. Because of this, I think the Medina Foundation has had a significant impact on our community by helping to both sustain good programs that are working, and by supporting efforts at capacity building and other ways of helping nonprofits become more effective."*



*"The Foundation impacts communities at the local level through funding grass roots, locally-based programs and services that are proven to respond to the unique needs of each community."*



*"Medina's impact is far-reaching. Because of the due diligence they do in their grant-making, I believe it adds value to nonprofits to have them listed as a grantor. They also understand the importance of public policy as well as direct service."*

## Understanding of and Impact on Grantees' Organizations

In CEP's research across funders, grantee feedback points to a few important predictors of a funder's impact on its grantees' organizations, including: how well the funder understands its grantees' goals and strategy, the characteristics of the grants provided, and patterns of non-monetary assistance.

- Grantees rate Medina's impact on and understanding of their organizations in the top 25 percent of funders in CEP's dataset.
  - Ratings for the Foundation's understanding of grantees' goals and strategy have also improved significantly since 2006.
- Medina is rated similar to the typical funder for the Foundation's impact on grantees' ability to sustain the funded work.

### Grantmaking Characteristics

- Medina grantees who receive a specific pattern of larger (often six-figure), multi-year, general operating support grants rate the Foundation's impact on their organization significantly more positively than grantees receiving other patterns of grants.
  - A larger than typical proportion of grantees—75 percent at Medina compared to 20 percent at the typical funder—receive general operating support.
  - However, Medina's grant size is smaller than typical—the median Medina grantee receives \$25K, compared to \$40K at the median funder in Medina's custom cohort and \$60K at the typical funder in CEP's dataset.
  - In addition, 20 percent of Medina grantees receive multi-year grants, compared to about half of grantees in Medina's cohort and at the typical funder.
- One of the two most common suggestions for the Foundation—provided by 27 percent of grantees—relates to grantmaking characteristics.
  - Six grantees suggest longer grants, specifically requesting multi-year support.
  - Five grantees either request more operating support, or ask the Foundation to “remain committed to general operating support.”
  - In addition, two grantees request larger grants and one grantee suggests more clarity regarding the types of grants Medina is willing to give.

### Non-monetary Assistance

- Medina grantees who receive some assistance beyond the grant have a substantially more positive experience with the Foundation than grantees who receive no assistance.
  - Twenty-one percent of Medina grantees receive some form of non-monetary assistance, compared to 52 percent of grantees at the typical funder.
  - Grantees who receive even one or two types of assistance rate significantly higher than grantees receiving no assistance for most measures throughout the report, including Medina's impact on and understanding of grantees' organizations.
- **Recommendation:** *To build on its already strong impact on grantees' organizations, Medina should consider its strategy to support an even larger proportion of its most closely aligned grantees with large, multi-year, operating support grants and/or assistance beyond the grant.*



*“Medina is a wonderful resource because they understand how valuable general operating dollars can be to an agency. By having flexible dollars, we can meet the community's needs as they increase or shift.”*



*“The Foundation's good reputation is valuable when seeking other funding. It is very helpful to show Medina as one of our supporters. Medina visits have engaged our board members in ways that increase their commitment to our organization.”*



*“[Medina is] extremely thoughtful in the way that they look holistically at our nonprofit sector and seek to build capacity in a variety of different ways. I particularly appreciated the special capacity building grants that the Foundation gave several years ago in celebration of their anniversary, and their commitment to sending leaders to the Nonprofit Executive Leadership Institute. They even at one time offered grantees subscriptions to the Stanford Social Innovation Review - this is how I learned of the publication, and I continued to subscribe for years. The Medina Foundation is an authentic partner to nonprofits”*

## Funder-Grantee Relationships

Overall, Medina grantees rate their relationship with the Foundation more positively than grantees at the typical funder and significantly more positively than in 2006.

- The Foundation is rated in the top 15 percent of funders in CEP’s dataset for its interactions with grantees, including fairness, responsiveness, and comfort approaching the Foundation.
- Although grantees provide more positive than typical ratings for the consistency of Medina’s communications, ratings for the clarity of the Foundation’s goals and strategy are just similar to the typical funder.

Considering Medina’s comparatively high program staff caseload—85 active grants per program FTE at Medina compared to 33 active grants per program FTE at the typical funder—the Foundation should determine whether it has the capacity to increase the frequency of certain funder-grantee interactions.

- CEP’s broader research shows that frequent and reciprocal interactions are associated with significantly more positive perceptions of the funder-grantee relationship.
  - More than half of Medina’s grantees (54 percent) report interacting with their program officer yearly or less often, compared to 22 percent at the typical funder.
  - In addition, almost half of the Foundation’s grantees indicate they most often initiate contact with their program officer (as opposed to having reciprocal or program officer-initiated interactions).
- In their suggestions for the Foundation, seven grantees request more site visits and five grantees specifically mention more frequent interactions. Grantees ask for “greater contact throughout the grant period” and “more follow up” after funding is received.
- **Recommendation:** *To further strengthen grantee relationships, the Foundation should consider whether it has the capacity to increase the frequency and reciprocity of its interactions with grantees. In addition, Medina should continue to hone clear communication about the Foundation’s goals and strategy.*



*"Interactions are \*always\* pleasant and professional. Our relationship with the Foundation feels much more like a partnership than it does with other funding sources."*



*"I was overall pleased with the experience but as difficult as it was to obtain I expected more involvement from them as the project continued. There was no follow up to even see what we did. Once it was approved and the check issued I never heard from them again."*



*"We appreciate the fact that we can reach out at any time-- staff are never hard to reach and always responsive and professional."*



*"We have always found the Foundation staff to be supportive and helpful; it's clear they want us to succeed. I especially appreciate their relative consistency from year to year."*

## Grant Processes

Medina Foundation's processes are relatively streamlined, but limited in their helpfulness strengthening grantees' organizations or funded programs.

- Although grantees spend a similar number of hours on grant processes as in 2006, the helpfulness of both the selection and reporting/evaluation processes have declined significantly.
  - The helpfulness of both processes in strengthening grantees' organizations is rated in the bottom 15 percent of funders.
  - The typical Medina grantee spends 18 hours on process requirements, compared to 30 hours spent by the typical grantee in CEP's broader dataset.

CEP's broader research and Medina feedback indicate that specific interactions correspond with more helpful grant processes.

- Medina grantees who discussed how the work funded by the grant would be assessed rate significantly higher for the helpfulness of the Foundation's selection process.
  - Forty-one percent of Medina grantees report exchanging ideas about how to assess the results of the funded work, compared to 71 percent of grantees at the typical funder.
- In addition, CEP's broader research shows that grantees who have discussed their completed evaluation with their Foundation rate significantly higher for the helpfulness of the reporting/evaluation process.
  - A smaller than typical proportion of Medina grantees (9 percent) indicate they discussed their completed report/evaluation with Foundation staff.

Grantees also provide suggestions regarding the Foundation's selection process.

- Twenty-seven percent of grantee suggestions relate to Medina's selection process.
  - Seven grantees ask for changes to the Foundation's proposal guidelines/requirements, mentioning that it "takes twice as long...when having to worry about specific word counts for each question" and "the space limitations are fairly extreme."
  - Five grantees mention funding timelines, commenting that because they are "not eligible to submit a new proposal until the anniversary of the last award" their revenue

timeline is negatively impacted. In addition, one grantee suggests “a quicker turnaround time” between the grant deadline and notice of funding.

- The remaining three comments ask for more feedback regarding proposals, and invitations to submit LOIs for repeat grantees.
- **Recommendation:** *Considering Medina’s goals and types of funding, the Foundation should determine whether it is comfortable with the perceived helpfulness of its selection and reporting/evaluation processes, and whether the capacity exists to discuss reports or evaluations with a larger proportion of grantees. In addition, Medina should consider adjusting the current guidelines and requirements of the selection process to address grantees’ concerns.*



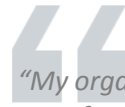
*“The staff are all very approachable and understanding when questions arise about the process. The process of applying for and reporting back on the first grant involved far more interaction than in the subsequent grants.”*



*“We consistently look back at grants submitted to the foundation for reference when working on other grant proposals, because the structure of the Medina Foundation grants lends itself to what we see as some of our strongest writing. However, we do struggle with the restriction of not submitting a new application until a grant cycle has completely ended - this puts us on an every-other-year funding cycle with the Foundation - we would love to be eligible for funding every year instead.”*



*“We have not experienced much interaction with Foundation staff before we submit an application.... It is also the same amount of effort to obtain a \$10,000 grant as it is to obtain a \$150,000. And you need to report on the year of funding after the year is over and then go through the funding process again. So we have not been able to obtain consistent funding, but rather a grant every 18 months or so.”*



*“My organization has received funding irregularly. We often are approved for an award every other year and it would be helpful to understand how the Medina Foundation chooses to award funds...the more transparent foundations are about what their guidelines are for qualifying, the more helpful it is to us to not only split up staff requirements, but also to budget for future years.”*

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## Summary of Recommendations

Based on its grantee feedback, CEP recommends Medina consider the following in order to build on its strengths and address potential areas for improvement:

- Identify what policies and practices contribute to strong ratings of impact on grantees’ fields and communities, and determine whether it is a goal to further improve additional aspects of Medina’s work in grantees’ fields and communities.
- Determine whether providing a larger proportion of closely aligned grantees with large, multi-year, operating support grants or assistance beyond the grant is in line with the Foundation’s current strategy.

- Consider program staff capacity and caseload in order to further build strong grantee relationships through more frequent and reciprocal contact.
- Continue to clarify communication of the Foundation’s goals and strategy.
- Discuss opportunities to respond to grantees’ suggestions about the Foundation’s grant processes, giving particular attention to the current selection process guidelines and helpfulness of the processes.

## Methodology

The Center for Effective Philanthropy (CEP) surveyed 199 grantees of the Medina Foundation during May and June of 2015. CEP received 136 completed responses for a 68 percent response rate. This is the second GPR for the Foundation. CEP also surveyed Medina’s grantees in September and October 2006, achieving an 81 percent response rate.

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