MetroWest HEALTH FOUNDATION

2017 Grantee Perception Report

January 31, 2017

The MetroWest Health Foundation works closely with area nonprofits, state and local government, community organizations and others to improve the health of the MetroWest region. Since the Foundation was established in 1999, we have consistently sought ways to measure our performance and improve our work. Part of this quality improvement process includes soliciting periodic feedback from our grantees. Attached are the results of our latest effort to gauge grantee feedback, the 2017 Grantee Perception Report.

The Grantee Perception Report is based on a survey of our grantees completed this past fall and conducted on our behalf by the **Center for Effective Philanthropy**. The report focuses on six areas: Impact on Grantee Fields and Local Communities; Impact on Grantee Organizations; Funder-Grantee Relationships; Grant Processes; Dollar Return for Time Spent on Processes and Non-Monetary Assistance. The 2017 Report also benchmarks our current performance to similar surveys commissioned over the last ten years, as well as to the results from other funders across the country, including other health conversion foundations.

The results of the 2017 survey are very positive, but also point out areas where we need to improve. Work is currently underway to use these results to make further improvements, especially in funding sustainability. We invite your feedback or suggestions at info@mwheath.org

Finally, thank you to everyone who took the time to complete the survey. Your feedback is critical to our ongoing efforts to improve the health of the region.

Martin Cohen

Martin D. Cohen
President

Grantee Perception Report®

PREPARED FOR

MetroWest Health Foundation

January 2017

CEP

**THE CENTER FOR
EFFECTIVE PHILANTHROPY**

The online version of this report can be accessed at cep.surveyresults.org.

TABLE OF CONTENTS

Interpreting Your Charts

Many of the charts in this report are shown in this format. See below for an explanation of the chart elements.
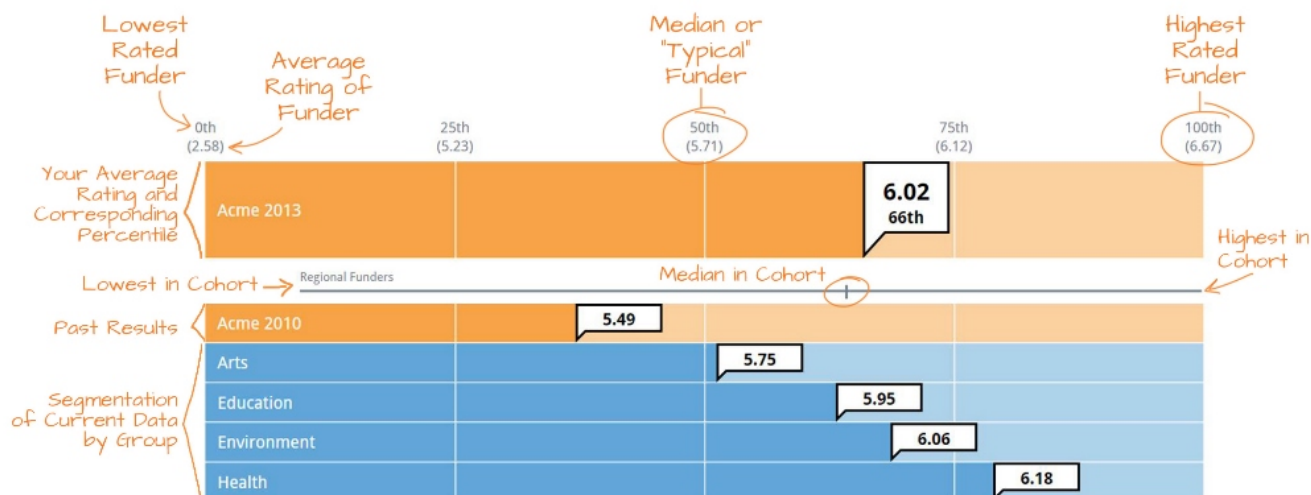
Missing data: Selected grantee ratings are not displayed in this report due to changes in the survey instrument, or when a question received fewer than 5 responses.

STATISTICAL SIGNIFICANCE OF CHANGES OVER TIME

CEP compares your past ratings to your current ratings, testing for statistically significant differences. An asterisk in your current results denotes a statistically significant difference between your current rating and the previous rating.

5.81*
60th

Key Ratings Summary

The following chart highlights a selection of your key results. Each of these data points corresponds to an individual survey measure that is displayed with additional detail in the subsequent pages of this report.

Key Measures	Trend Data	Average Rating	Percentile Rank
Field Impact Impact on Grantees' Fields		5.71	47th Custom Cohort
Community Impact Impact on Grantees' Communities		6.07	74th Custom Cohort
Organizational Impact Impact on Grantees' Organizations		6.00	38th Custom Cohort
Relationships Strength of Relationships with Grantees		6.38	80th Custom Cohort
Selection Process Helpfulness of the Selection Process		5.20	78th Custom Cohort
Reporting/Evaluation Process Helpfulness of the Reporting and Evaluation Process		4.88	77th Custom Cohort

Summary of Differences by Subgroup

Grantee responses do not vary consistently by **initiative or grant type**.

Panel: No statistical tests were run because subgroup counts did not meet CEP's threshold for statistical testing. However, ratings from Leonard Morse Grants Panel (LMGP) trend higher than those of other grants panel grantees.

Word Cloud

Grantees were asked, "At this point in time, what is one word that best describes the Foundation?" In the "word cloud" below, the size of each word indicates the frequency with which it was written by grantees. The color of each word is stylistic and not indicative of its frequency. Eight grantees described MetroWest as "Supportive," the most commonly used word.

This image was produced using a free tool available at www.tagxedo.com. Copyright (c) 2006, ComponentAce. http://www.componentace.com.

Survey Population

Survey	Survey Fielded	Number of Responses Received	Survey Response Rate
MetroWest 2016	September and October 2016	48	76%
MetroWest 2013	September and October 2013	44	73%
MetroWest 2010	September and October 2010	50	68%
MetroWest 2007	September and October 2007	73	66%

Survey Year	Year of Active Grants
MetroWest 2016	2015
MetroWest 2013	2011-2012
MetroWest 2010	2009
MetroWest 2007	2006

Throughout this report, MetroWest Health Foundation's survey results are compared to CEP's broader dataset of more than 40,000 grantees built up over more than a decade of grantee surveys of more than 250 funders. The full list of participating funders can be found at http://www.effectivephilanthropy.org/assessments/gpr-apr/.

In order to protect the confidentiality of respondents, results are not shown when CEP received fewer than five responses to a specific question.

Subgroups

In addition to showing MetroWest's overall ratings, this report shows ratings segmented by Initiative*. The online version of this report also shows ratings segmented by Grant Type and Panel.

Initiative	Number of Responses
Adolescent Health	17
Responsive	14
Access to Care	9
Healthy Aging	8

Grant Type	Number of Responses
Targeted	34
Responsive	14

Panel	Number of Responses
DC	28
FUGP	7
P	7
LMGP	6

Responsive is comprised of Childhood Obesity, Community Health, and Responsive Grant grantees.
Adolescent Health is comprised of Adolescent Health, Adolescent Mental Health, and Risky Behaviors Among Adolescents grantees.

Comparative Cohorts

Customized Cohort

MetroWest selected a set of 14 funders to create a smaller comparison group that more closely resembles MetroWest in scale and scope.

Custom Cohort

Blue Cross Blue Shield of Massachusetts Foundation

Caring for Colorado Foundation

Community Memorial Foundation

Connecticut Health Foundation, Inc.

Danville Regional Foundation

Endowment for Health

Health Foundation of Greater Cincinnati

Maine Health Access Foundation

MetroWest Health Foundation

Quantum Foundation

The Hyams Foundation, Inc.

The Ontario Trillium Foundation

Tufts Health Plan Foundation

Williamsburg Health Foundation

Standard Cohorts

CEP also included 16 standard cohorts to allow for comparisons to a variety of different types of funders.

Strategy Cohorts

Cohort Name	Count	Description
Small Grant Providers	41	Funders with median grant size of $20K or less
Large Grant Providers	58	Funders with median grant size of $200K or more
High Touch Funders	24	Funders for which a majority of grantees report having contact with their primary contact monthly or more often
Intensive Non-Monetary Assistance Providers	29	Funders that provide at least 30% of grantees with comprehensive or field-focused assistance as defined by CEP
Proactive Grantmakers	52	Funders that make at least 90% of grants proactively
Responsive Grantmakers	54	Funders that make at most 10% of grants proactively
International Funders	39	Funders with an international scope of work

Annual Giving Cohorts

Cohort Name	Count	Description
Funders Giving Less Than $5 Million	51	Funders with annual giving of less than $5 million
Funders Giving $50 Million or More	51	Funders with annual giving of $50 million or more

Foundation Type Cohorts

Cohort Name	Count	Description
Private Foundations	128	All private foundations in the GPR dataset
Family Foundations	52	All family foundations in the GPR dataset
Community Foundations	31	All community foundations in the GPR dataset
Health Conversion Foundations	28	All health conversation foundations in the GPR dataset
Corporate Foundations	18	All corporate foundations in the GPR dataset

Other Cohorts

Cohort Name	Count	Description
Funders Outside the United States	22	Funders that are primarily based outside the United States
Recently Established Foundations	47	Funders that were established in 2000 or later

Grantmaking Characteristics

Foundations make different choices about the ways they organize themselves, structure their grants, and the types of grantees they support. The following charts and tables show some of these important characteristics. The information is based on self-reported data from funders and grantees, and further detail is available in the Contextual Data section of this report.

Median Grant Size

	0th ($2K)	25th ($36K)	50th ($75K)	75th ($189K)	100th ($2142K)
MetroWest 2016			**$83K** 53rd		

Custom Cohort

MetroWest 2013		$50K			
MetroWest 2010		$60K			
MetroWest 2007		$50K			
Adolescent Health				$150K	
Responsive	$20K				
Access to Care				$148K	
Healthy Aging	$38K				

Cohort: Custom Cohort ▼   Past results: ◉ On ○ Off   Subgroup: Initiative ▼

Average Grant Length

	0th (1.1yrs)	25th (1.8yrs)	50th (2.2yrs)	75th (2.7yrs)	100th (5.3yrs)
MetroWest 2016				**2.6yrs** 73rd	

Custom Cohort

MetroWest 2013			2.3yrs		
MetroWest 2010			2.4yrs		
MetroWest 2007	1.8yrs				
Adolescent Health				2.7yrs	
Responsive		1.9yrs			
Access to Care				3.7yrs	
Healthy Aging			2.3yrs		

Cohort: Custom Cohort ▼   Past results: ◉ On ○ Off   Subgroup: Initiative ▼

Typical Organizational Budget

	0th ($0.0M)	25th ($0.8M)	50th ($1.5M)	75th ($2.5M)	100th ($36.5M)
MetroWest 2016			**$1.7M** **59th**		

Custom Cohort

MetroWest 2013				**$3.0M**	
MetroWest 2010			**$2.0M**		
MetroWest 2007			**$1.9M**		
Adolescent Health				**$11.0M**	
Responsive	**$0.6M**				
Access to Care				**$5.0M**	
Healthy Aging	**$0.6M**				

Cohort: [Custom Cohort ▼]   **Past results:** ● On ○ Off   **Subgroup:** [Initiative ▼]
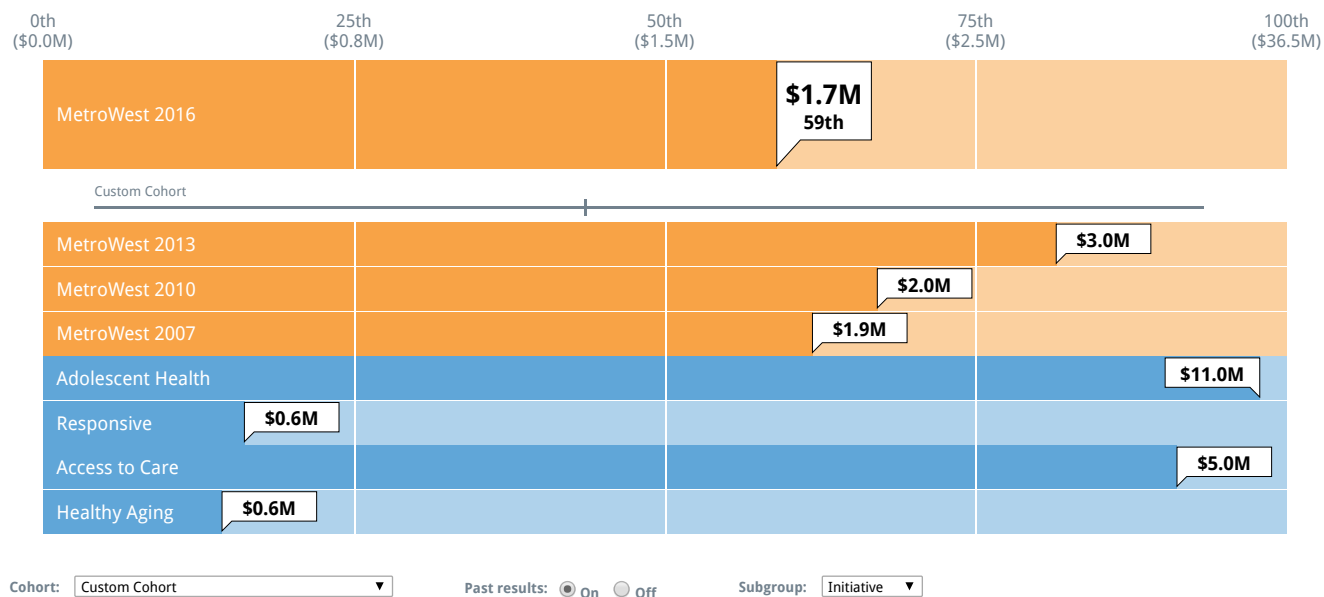
Type of Support (Overall)	MetroWest 2016	MetroWest 2013	MetroWest 2010	MetroWest 2007	Average Funder	Custom Cohort
Percent of grantees receiving general operating/core support	6%	0%	0%	1%	21%	13%
Percent of grantees receiving program/project support	88%	91%	96%	78%	64%	71%
Percent of grantees receiving other types of support	6%	9%	4%	21%	15%	16%

Grant History (Overall)	MetroWest 2016	MetroWest 2013	MetroWest 2010	Average Funder	Custom Cohort
Percentage of first-time grants	27%	33%	23%	29%	28%

Program Staff Load (Overall)	MetroWest 2016	MetroWest 2013	MetroWest 2010	MetroWest 2007	Median Funder	Custom Cohort
Dollars awarded per program staff full-time employee	$1.6M	$1.1M	$1.4M	$1.3M	$2.7M	$1.3M
Applications per program full-time employee	45	37	37	N/A	29	26
Active grants per program full-time employee	47	38	26	30	34	32

Impact on and Understanding of Grantees' Fields

"Overall, how would you rate the Foundation's impact on your field?"

1 = No impact   7 = Significant positive impact

0th (4.15)	25th (5.47)	50th (5.73)	75th (5.94)	100th (6.46)
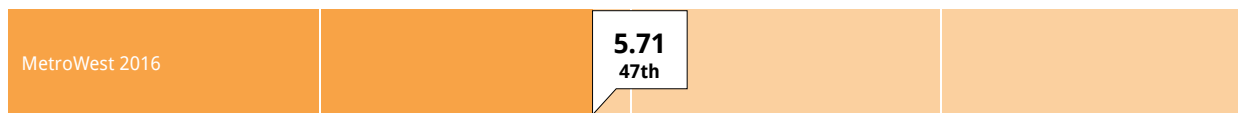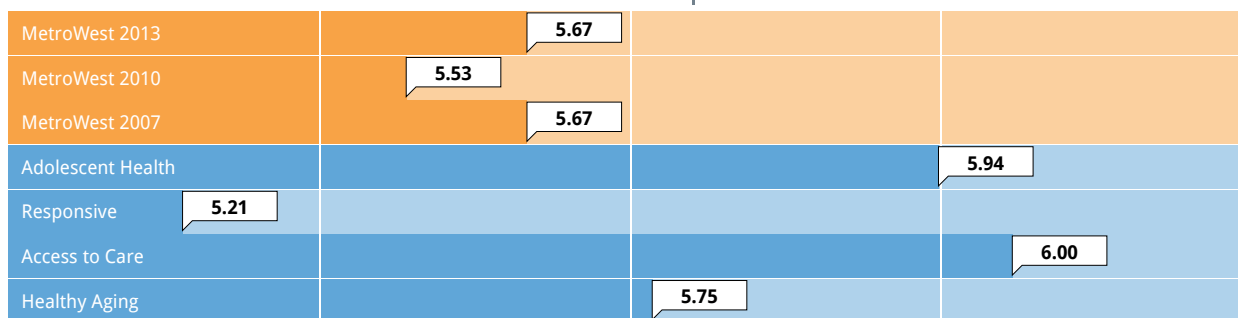
MetroWest 2016 — **5.71** 47th

Custom Cohort

MetroWest 2013 — 5.67
MetroWest 2010 — 5.53
MetroWest 2007 — 5.67
Adolescent Health — 5.94
Responsive — 5.21
Access to Care — 6.00
Healthy Aging — 5.75

Cohort: Custom Cohort ▼   Past results: ◉ On ○ Off   Subgroup: Initiative ▼

"How well does the Foundation understand the field in which you work?"

1 = Limited understanding of the field   7 = Regarded as an expert in the field

0th (4.17)	25th (5.43)	50th (5.67)	75th (5.92)	100th (6.39)

MetroWest 2016 — **5.58** 40th

Custom Cohort

MetroWest 2013 — 5.65
MetroWest 2010 — 5.79
MetroWest 2007 — 5.54
Adolescent Health — 5.53
Responsive — 5.21
Access to Care — 5.78
Healthy Aging — 6.13
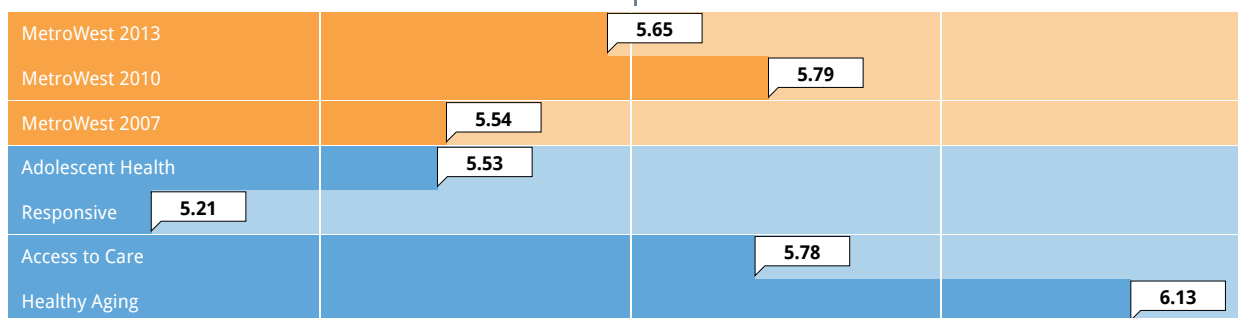
Cohort: Custom Cohort ▼   Past results: ◉ On ○ Off   Subgroup: Initiative ▼

Advancing Knowledge and Public Policy

"To what extent has the Foundation advanced the state of knowledge in your field?"

1 = Not at all   7 = Leads the field to new thinking and practice

	0th (2.69)	25th (4.68)	50th (5.08)	75th (5.40)	100th (6.30)
MetroWest 2016			**5.20** 60th		

Custom Cohort

MetroWest 2013				5.33	
MetroWest 2010			5.13		
MetroWest 2007			5.07		
Adolescent Health				5.29	
Responsive	4.33				
Access to Care					6.00
Healthy Aging					5.80
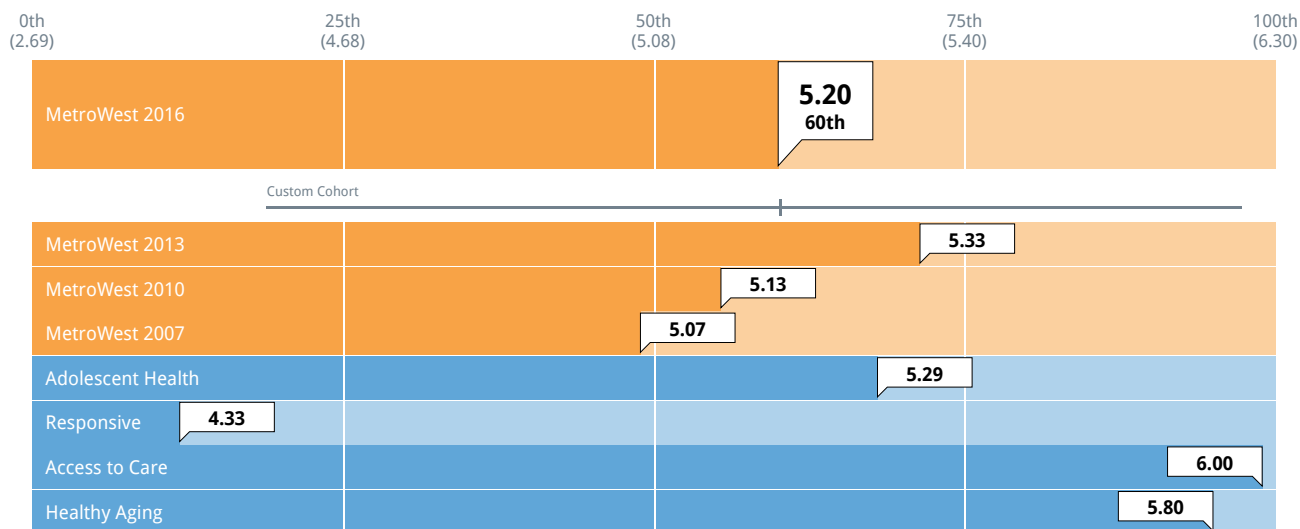
Cohort: [Custom Cohort ▼]   Past results: ◉ On ○ Off   Subgroup: [Initiative ▼]

"To what extent has the Foundation affected public policy in your field?"

1 = Not at all   7 = Major influence on shaping public policy
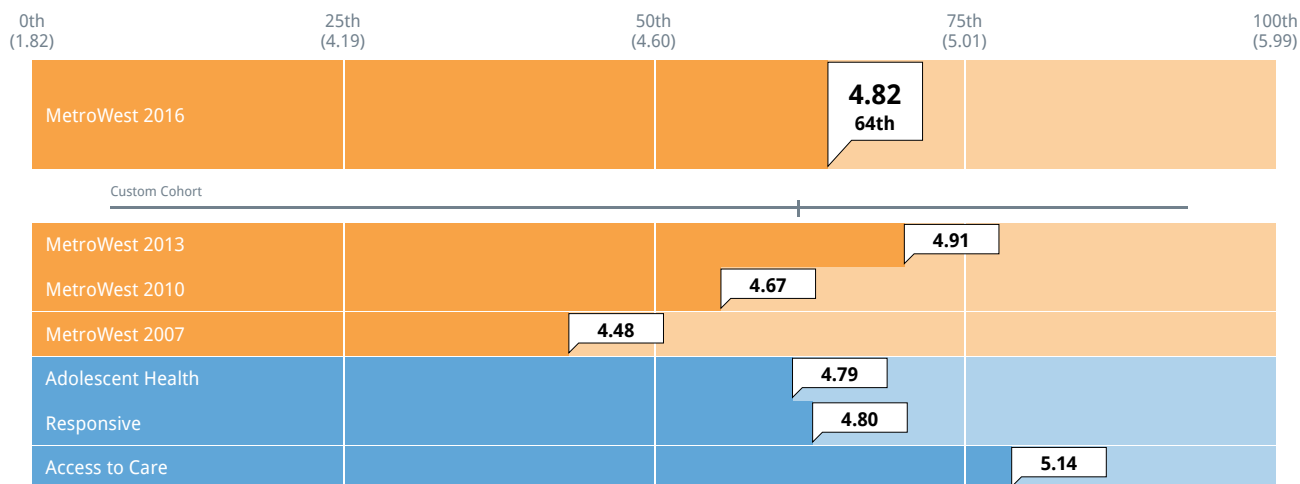
	0th (1.82)	25th (4.19)	50th (4.60)	75th (5.01)	100th (5.99)
MetroWest 2016			**4.82** 64th		

Custom Cohort

MetroWest 2013				4.91	
MetroWest 2010			4.67		
MetroWest 2007		4.48			
Adolescent Health			4.79		
Responsive			4.80		
Access to Care				5.14	

Cohort: [Custom Cohort ▼]   Past results: ◉ On ○ Off   Subgroup: [Initiative ▼]

Impact on and Understanding of Grantees' Local Communities

"Overall, how would you rate the Foundation's impact on your local community?"

1 = No impact   **7** = Significant positive impact
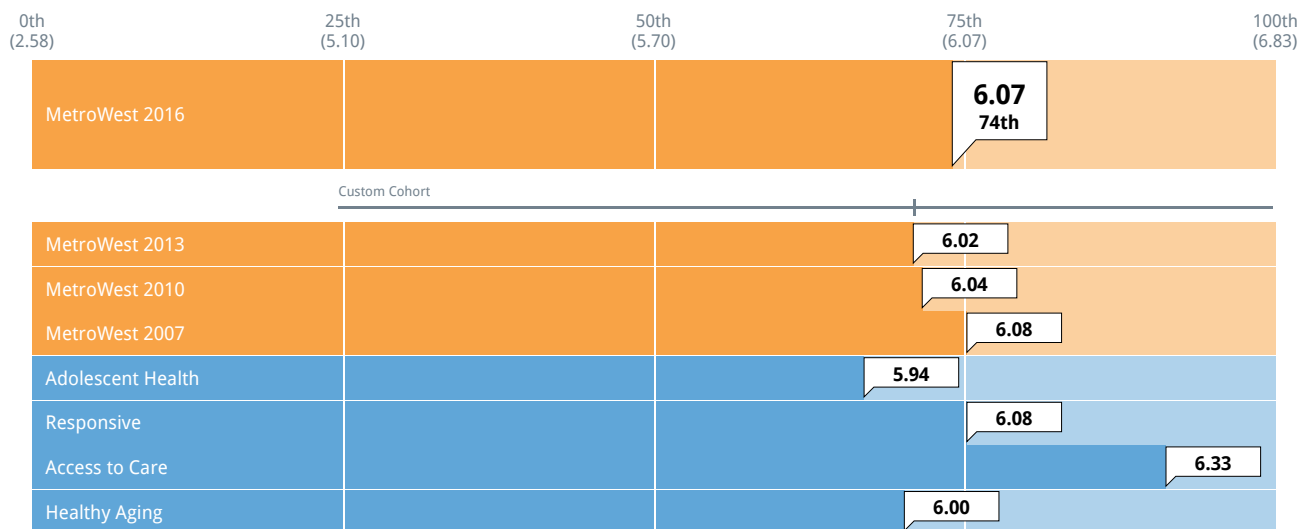
	0th (2.58)	25th (5.10)	50th (5.70)	75th (6.07)	100th (6.83)
MetroWest 2016				**6.07** **74th**	

Custom Cohort

MetroWest 2013				6.02	
MetroWest 2010				6.04	
MetroWest 2007				6.08	
Adolescent Health			5.94		
Responsive				6.08	
Access to Care				6.33	
Healthy Aging			6.00		

Cohort: Custom Cohort ▼   **Past results:** ◉ On ○ Off   **Subgroup:** Initiative ▼

"How well does the Foundation understand the local community in which you work?"

1 = Limited understanding of the community   **7** = Regarded as an expert on the community
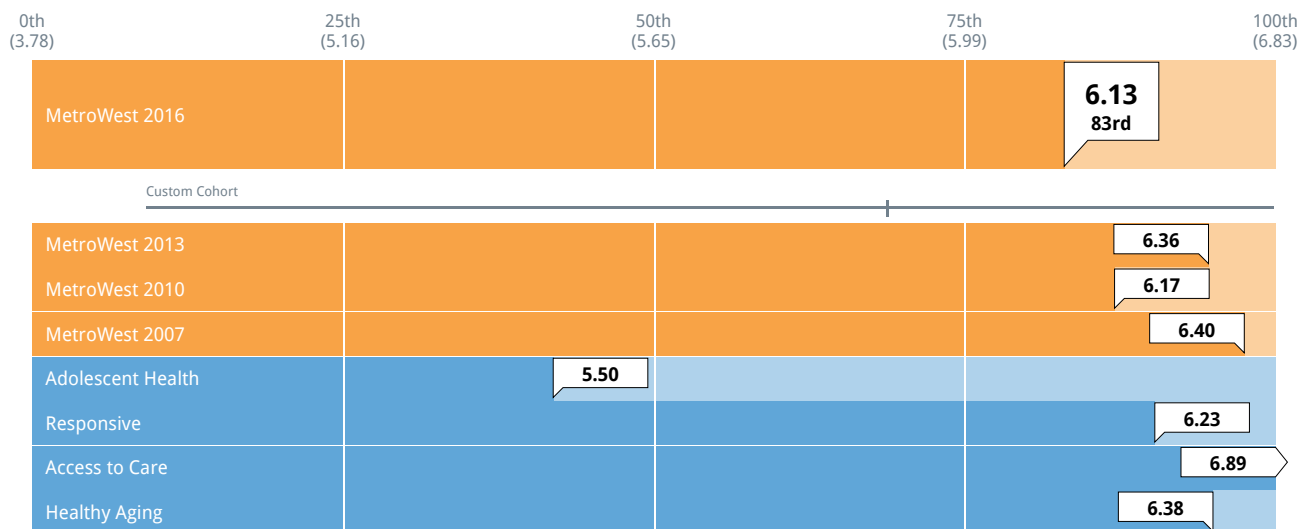
	0th (3.78)	25th (5.16)	50th (5.65)	75th (5.99)	100th (6.83)
MetroWest 2016				**6.13** **83rd**	

Custom Cohort

MetroWest 2013				6.36	
MetroWest 2010				6.17	
MetroWest 2007				6.40	
Adolescent Health		5.50			
Responsive				6.23	
Access to Care				6.89	
Healthy Aging				6.38	

Cohort: Custom Cohort ▼   **Past results:** ◉ On ○ Off   **Subgroup:** Initiative ▼

Impact on and Understanding of Grantees' Organizations

"Overall, how would you rate the Foundation's impact on your organization?"

1 = No impact   **7** = Significant positive impact

	0th (4.58)	25th (5.87)	50th (6.12)	75th (6.30)	100th (6.73)
MetroWest 2016		**6.00** 38th			
	Custom Cohort				
MetroWest 2013			6.16		
MetroWest 2010			6.22		
MetroWest 2007		6.04			
Adolescent Health	5.88				
Responsive	5.50				
Access to Care				6.63	
Healthy Aging				6.50	

Cohort: [Custom Cohort ▼]   Past results: ◉ On ○ Off   Subgroup: [Initiative ▼]
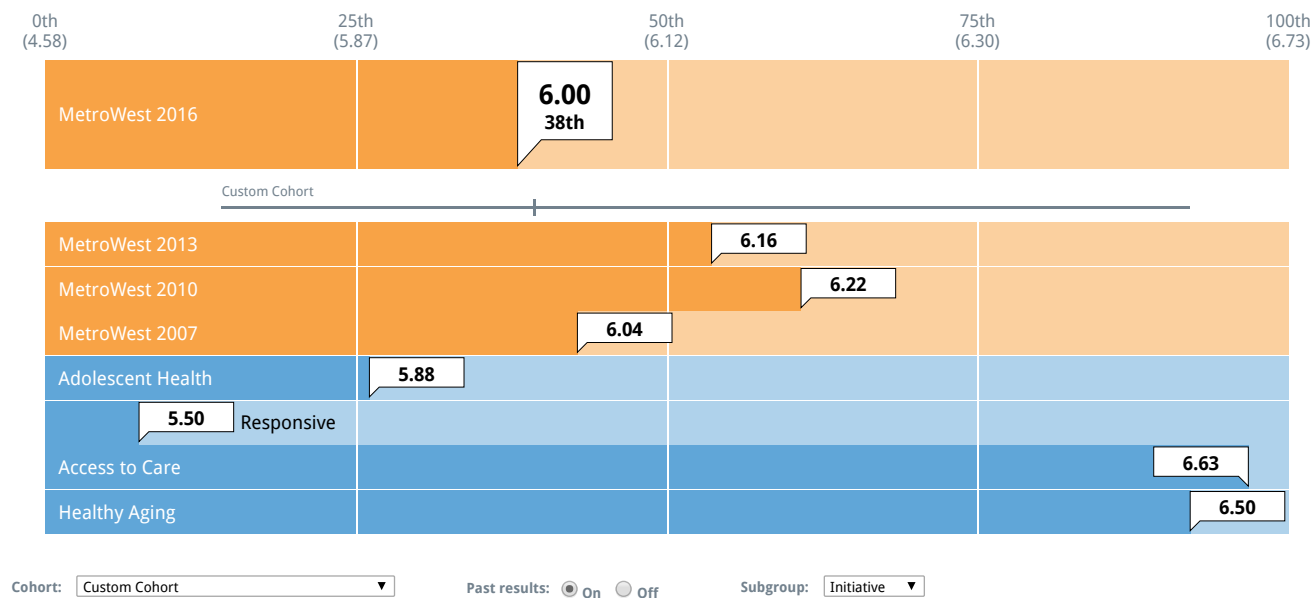
"How well does the Foundation understand your organization's strategy and goals?"

1 = Limited understanding   **7** = Thorough understanding
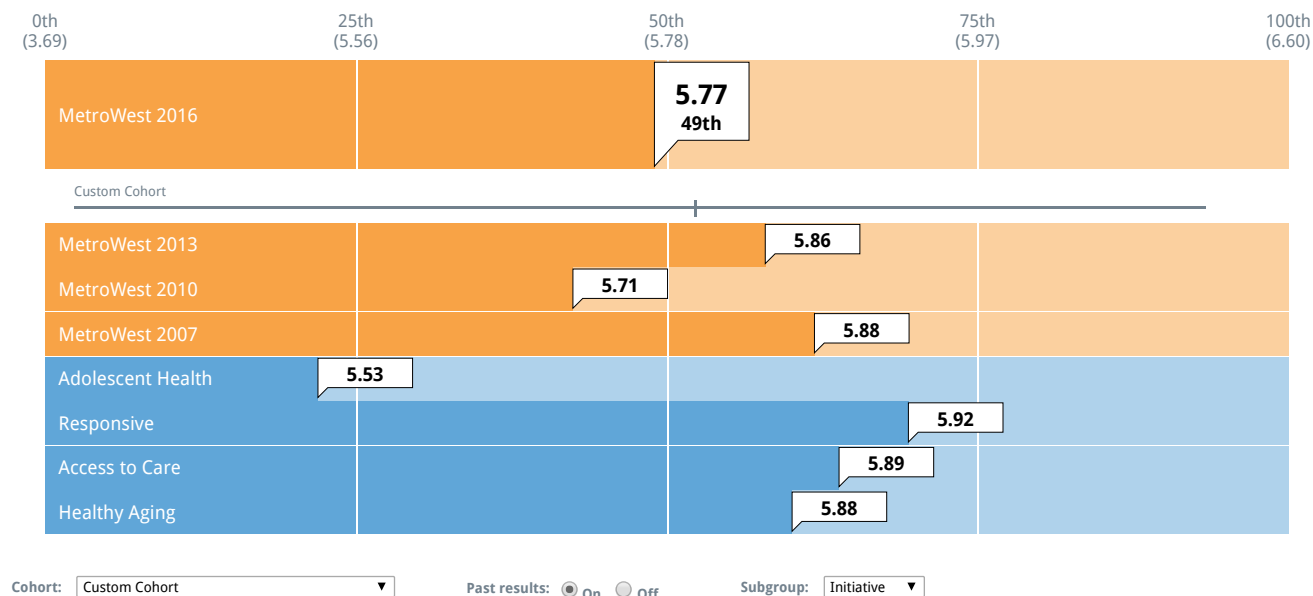
	0th (3.69)	25th (5.56)	50th (5.78)	75th (5.97)	100th (6.60)
MetroWest 2016		**5.77** 49th			
	Custom Cohort				
MetroWest 2013			5.86		
MetroWest 2010		5.71			
MetroWest 2007			5.88		
Adolescent Health	5.53				
Responsive				5.92	
Access to Care			5.89		
Healthy Aging			5.88		

Cohort: [Custom Cohort ▼]   Past results: ◉ On ○ Off   Subgroup: [Initiative ▼]

15

"How well does the Foundation understand the social, cultural, or socioeconomic factors that affect your work?"

1 = Limited understanding   **7** = Thorough understanding

0th (4.24)	25th (5.41)	50th (5.68)	75th (5.90)	100th (6.58)
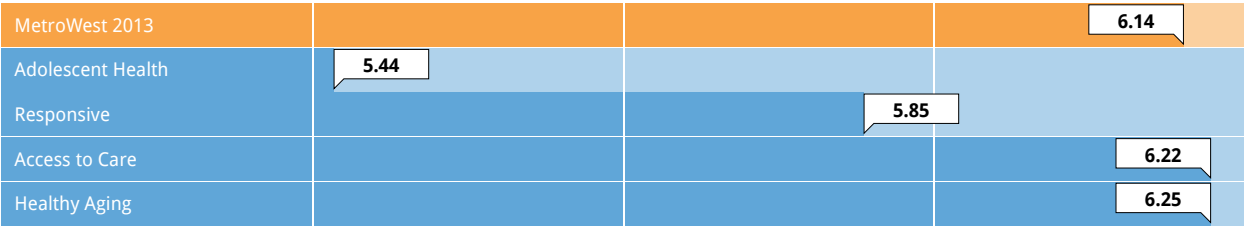
MetroWest 2016 — **5.85** / **70th**

Custom Cohort

MetroWest 2013 — 6.14
Adolescent Health — 5.44
Responsive — 5.85
Access to Care — 6.22
Healthy Aging — 6.25

Cohort: [Custom Cohort ▼]   **Past results:** ● On ○ Off   **Subgroup:** [Initiative ▼]

16

"How much, if at all, did the Foundation improve your ability to sustain the work funded by this grant in the future?"

1 = Did not improve ability   **7** = Substantially improved ability

0th (4.07)	25th (5.21)	50th (5.48)	75th (5.71)	100th (6.31)

5.00
11th   MetroWest 2016

Custom Cohort

MetroWest 2013   **5.15**

4.89   MetroWest 2010

MetroWest 2007   **5.57**

5.00   Adolescent Health

Responsive   **5.64**

4.22   Access to Care

4.67   Healthy Aging
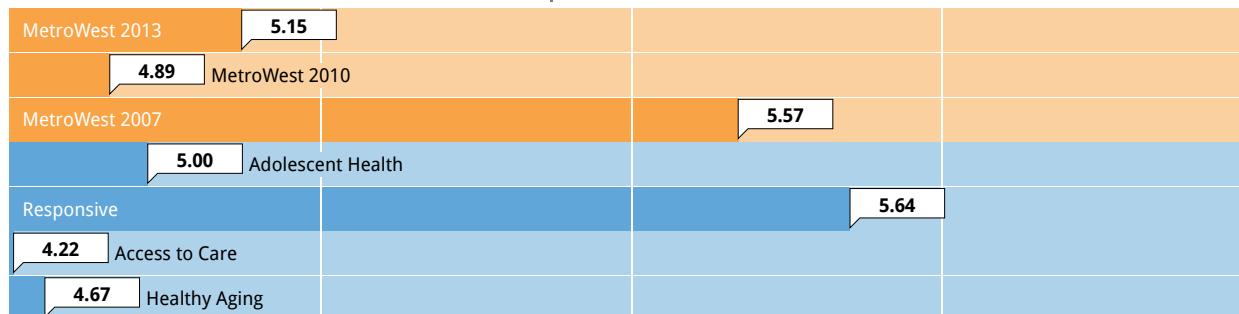
Cohort: [Custom Cohort   ▼]   Past results: ● On   ○ Off   Subgroup: [Initiative   ▼]

Effect of Grant on Organization

"Which of the following statements best describes the primary effect the receipt of this grant had on your organization's programs or operations?"

Primary Effect of Grant on Grantee's Organization (Overall)	MetroWest 2016	MetroWest 2013	MetroWest 2010	Average Funder	Custom Cohort
Enhanced Capacity	15%	11%	12%	29%	25%
Expanded Existing Program Work	15%	27%	18%	26%	23%
Maintained Existing Program	11%	7%	20%	20%	16%
Added New Program Work	60%	55%	50%	25%	35%

Primary Effect of Grant on Grantee's Organization (By Subgroup)	Adolescent Health	Responsive	Access to Care	Healthy Aging
Enhanced Capacity	6%	21%	22%	13%
Expanded Existing Program Work	6%	21%	22%	13%
Maintained Existing Program	6%	14%	22%	0%
Added New Program Work	81%	43%	33%	75%

Effect of Grant on Organization

Grantee Challenges

"How aware is the Foundation of the challenges that your organization is facing?"

1 = Not at all aware   **7** = Extremely aware

	0th (4.00)	25th (5.02)	50th (5.27)	75th (5.50)	100th (6.18)
MetroWest 2016				**5.38** 67th	

Custom Cohort

MetroWest 2013		**5.23**			
Adolescent Health		**5.19**			
Responsive	**5.14**				
Access to Care				**5.78**	
Healthy Aging				**5.75**	

Cohort: Custom Cohort ▼   **Past results:** ◉ On ○ Off   **Subgroup:** Initiative ▼
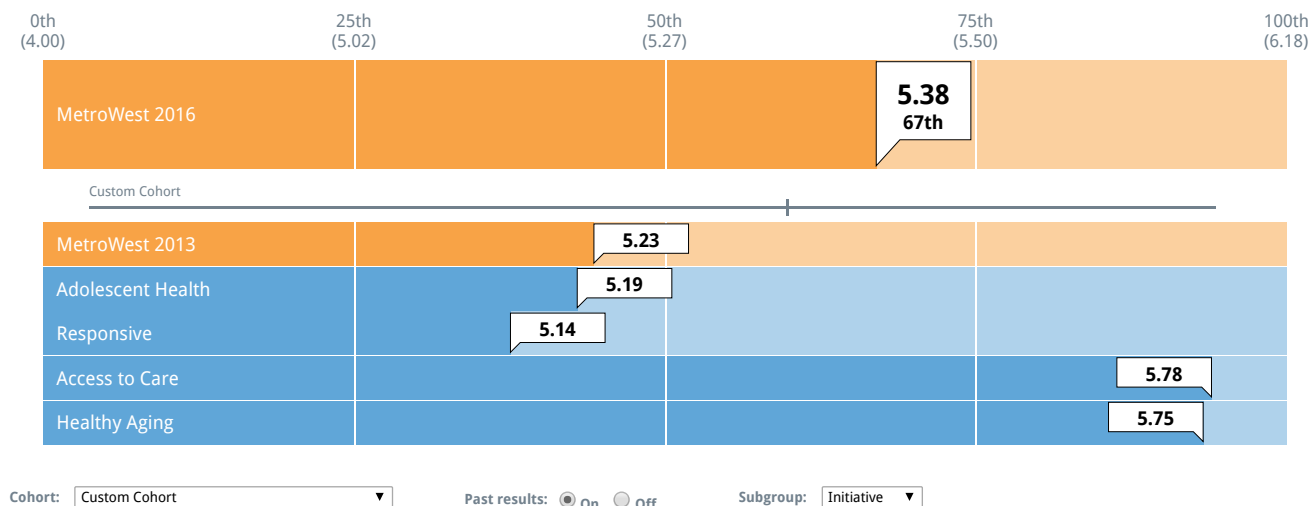
"To what extent does the Foundation take advantage of its various resources to help your organization address its challenges?"

1 = Not at all   **7** = To a very great extent

	0th (3.61)	25th (4.48)	50th (4.75)	75th (5.01)	100th (5.93)
MetroWest 2016				**5.20** 87th	

Custom Cohort

MetroWest 2013				**5.07**	
Adolescent Health				**5.06**	
Responsive		**4.64**			
Access to Care					**6.00**
Healthy Aging				**5.57**	

Cohort: Custom Cohort ▼   **Past results:** ◉ On ○ Off   **Subgroup:** Initiative ▼
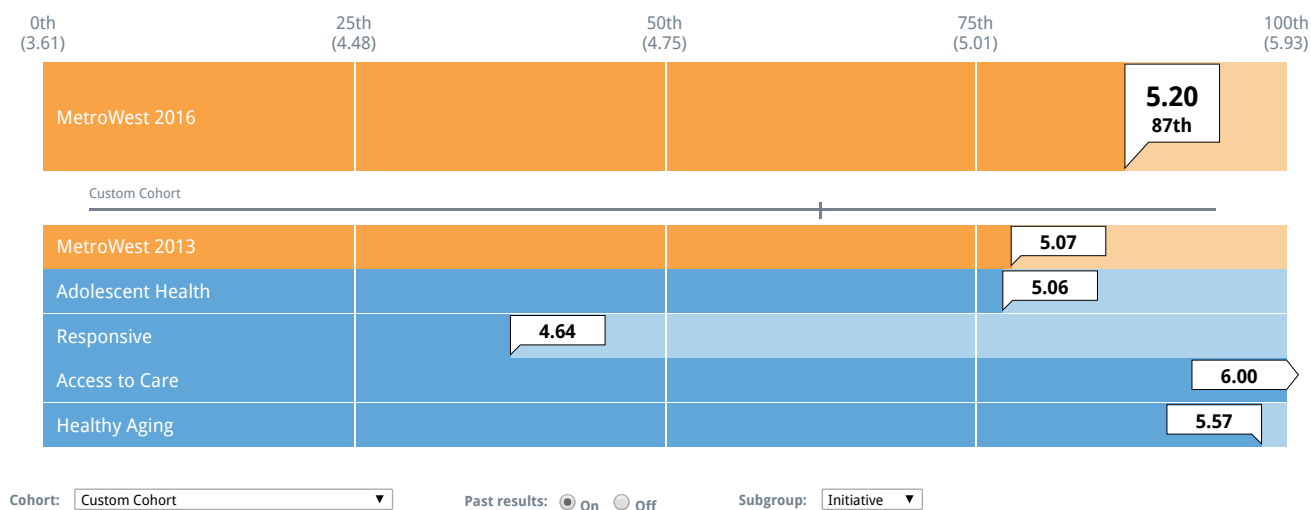
Funder-Grantee Relationships

Funder-Grantee Relationships Summary Measure

The quality of interactions and the clarity and consistency of communications together create the larger construct that CEP refers to as "relationships." The relationships measure below is an average of grantee ratings on the following measures:

1. Fairness of treatment by the foundation
2. Comfort approaching the foundation if a problem arises
3. Responsiveness of foundation staff
4. Clarity of communication of the foundation's goals and strategy
5. Consistency of information provided by different communications

Funder-Grantee Relationships Summary Measure

| **1** = Very negative | **7** = Very positive |

	0th (4.80)	25th (6.00)	50th (6.18)	75th (6.35)	100th (6.72)
MetroWest 2016				**6.38** **80th**	
Custom Cohort					
MetroWest 2013					**6.46**
MetroWest 2010			**6.24**		
MetroWest 2007					**6.43**
Adolescent Health	**6.11**				
Responsive				**6.42**	
Access to Care					**6.66**
Healthy Aging					**6.70**
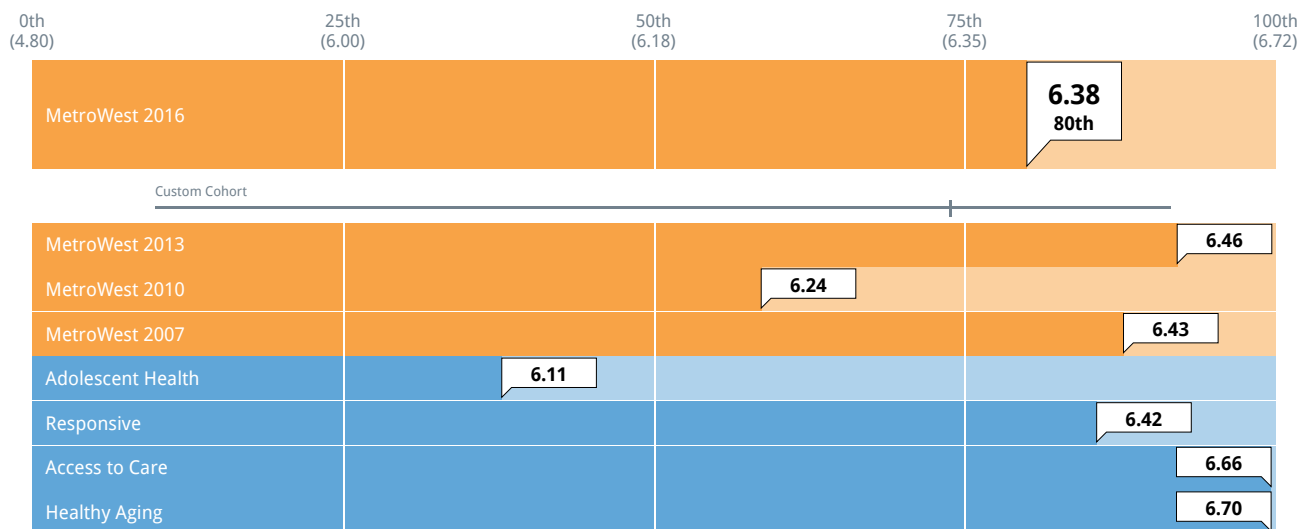
Cohort: [Custom Cohort ▼]   **Past results:** ◉ On ○ Off   **Subgroup:** [Initiative ▼]

Quality of Interactions

"Overall, how fairly did the Foundation treat you?"

1 = Not at all fairly   **7** = Extremely fairly

	0th (5.38)	25th (6.35)	50th (6.53)	75th (6.66)	100th (6.90)
MetroWest 2016				**6.60** 63rd	

Custom Cohort

MetroWest 2013					**6.75**
MetroWest 2010			**6.55**		
MetroWest 2007				**6.67**	
Adolescent Health	**6.35**				
Responsive		**6.50**			
Access to Care					**7.00**
Healthy Aging					**6.88**
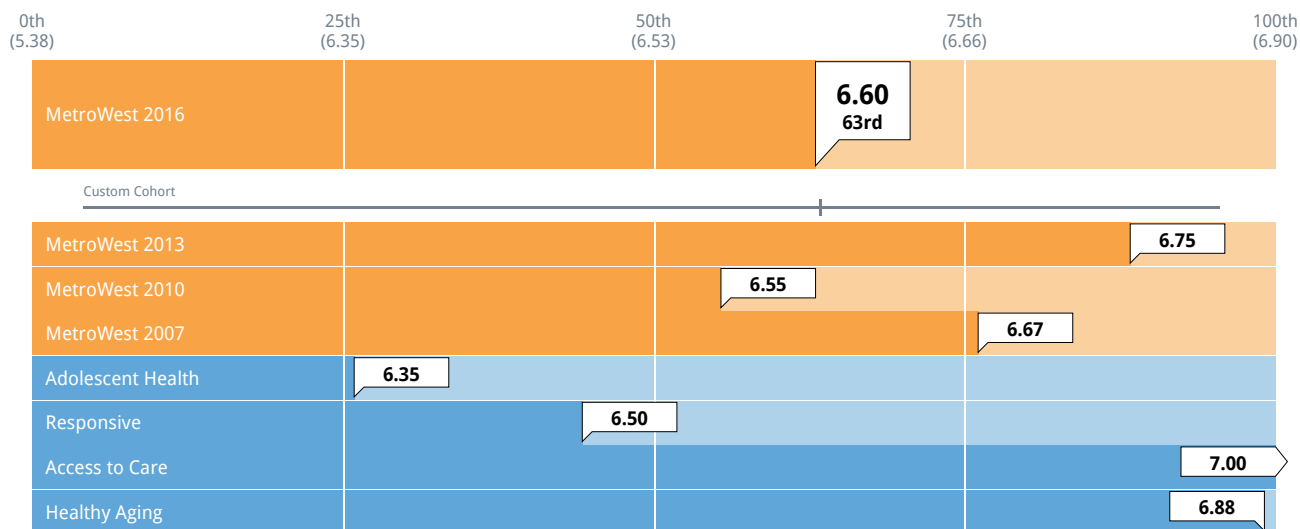
Cohort: Custom Cohort ▾   Past results: ● On ○ Off   Subgroup: Initiative ▾

"How comfortable do you feel approaching the Foundation if a problem arises?"

1 = Not at all comfortable   **7** = Extremely comfortable

	0th (5.29)	25th (6.03)	50th (6.20)	75th (6.34)	100th (6.78)
MetroWest 2016					**6.43** 86th

Custom Cohort

MetroWest 2013					**6.57**
MetroWest 2010		**6.08**			
MetroWest 2007				**6.50**	
Adolescent Health	**6.06**				
Responsive				**6.50**	
Access to Care					**6.67**
Healthy Aging					**6.86**
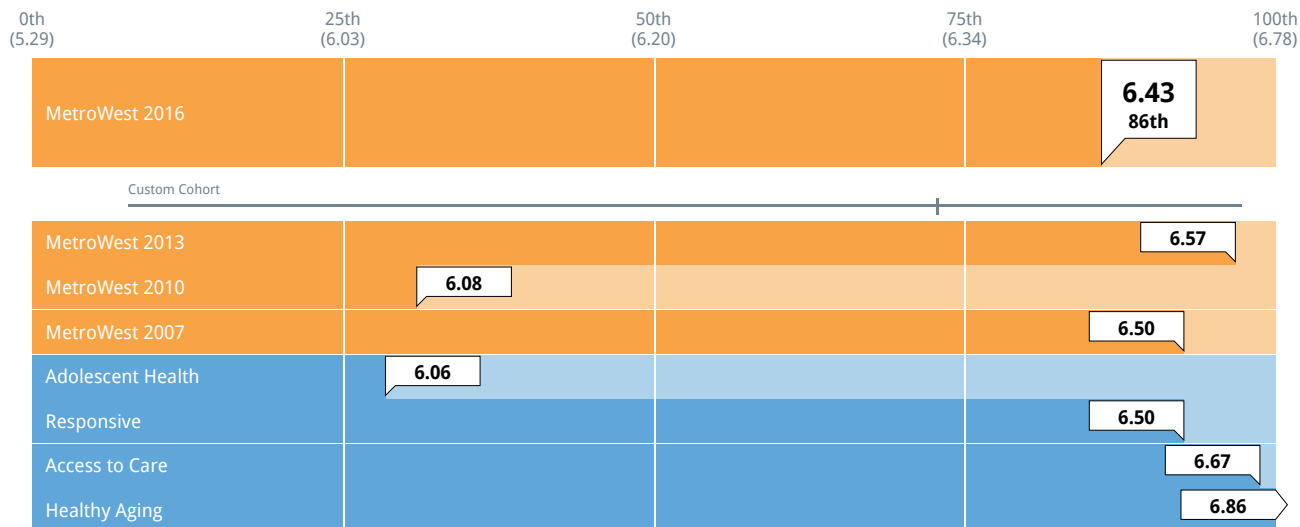
Cohort: Custom Cohort ▾   Past results: ● On ○ Off   Subgroup: Initiative ▾

"Overall, how responsive was the Foundation staff?"

1 = Not at all responsive   **7** = Extremely responsive
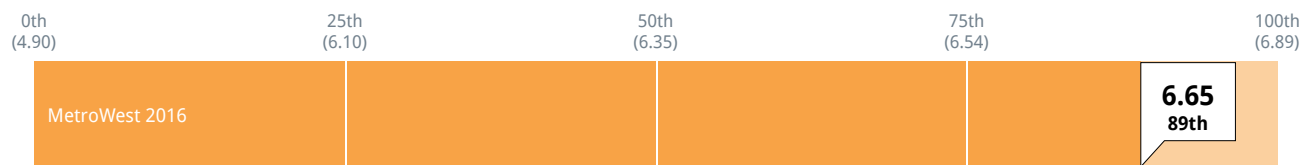
	0th (4.90)	25th (6.10)	50th (6.35)	75th (6.54)	100th (6.89)
MetroWest 2016					**6.65** 89th

Custom Cohort

MetroWest 2013				6.64	
MetroWest 2010			6.47		
MetroWest 2007				6.60	
Adolescent Health			6.35		
Responsive				6.79	
Access to Care				6.89	
Healthy Aging				6.75	

Cohort: Custom Cohort ▼   Past results: ◉ On ○ Off   Subgroup: Initiative ▼

22
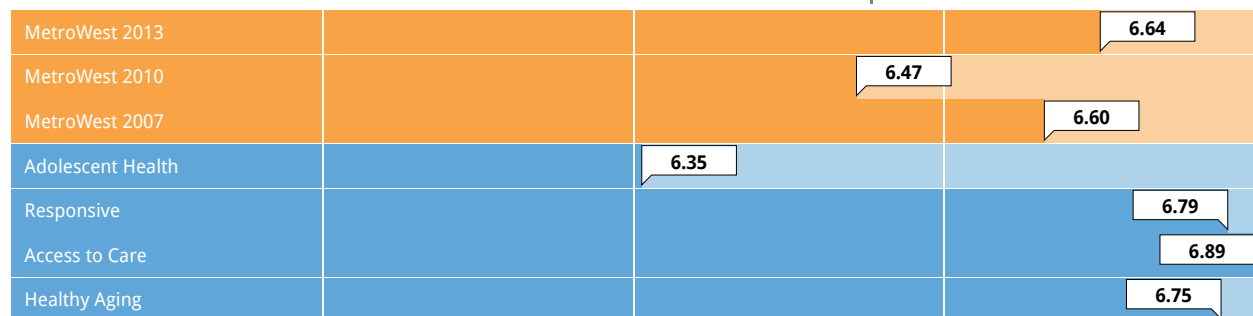
Interaction Patterns

"How often do/did you have contact with your program officer during this grant?"

Frequency of Contact with Program Officer (Overall)	MetroWest 2016	MetroWest 2013	MetroWest 2010	MetroWest 2007	Average Funder	Custom Cohort
Weekly or more often	0%	0%	0%	4%	3%	2%
A few times a month	4%	5%	11%	14%	11%	12%
Monthly	11%	20%	20%	17%	15%	16%
Once every few months	70%	70%	67%	59%	52%	54%
Yearly or less often	15%	5%	2%	6%	19%	16%

Frequency of Contact with Program Officer (By Subgroup)	Adolescent Health	Responsive	Access to Care	Healthy Aging
Weekly or more often	0%	0%	0%	0%
A few times a month	0%	7%	0%	13%
Monthly	13%	7%	11%	13%
Once every few months	69%	71%	67%	75%
Yearly or less often	19%	14%	22%	0%

"Who most frequently initiated the contact you had with your program officer?"

Initiation of Contact with Program Officer (Overall)	MetroWest 2016	MetroWest 2013	MetroWest 2010	MetroWest 2007	Average Funder	Custom Cohort
Program Officer	20%	9%	32%	11%	15%	17%
Both of equal frequency	48%	42%	32%	42%	49%	51%
Grantee	32%	49%	36%	48%	36%	32%

Initiation of Contact with Program Officer (By Subgroup)	Adolescent Health	Responsive	Access to Care	Healthy Aging
Program Officer	20%	38%	11%	0%
Both of equal frequency	53%	31%	56%	57%
Grantee	27%	31%	33%	43%

Contact Change and Site Visits

"Has your main contact at the Foundation changed in the past six months?"

Proportion of grantees responding 'Yes'

0th (0%)	25th (5%)	50th (13%)	75th (24%)	100th (90%)

0%* **2nd** MetroWest 2016

Custom Cohort

MetroWest 2013				33%
MetroWest 2010		14%		
Adolescent Health	0%			
Responsive	0%			
Access to Care	0%			
Healthy Aging	0%			
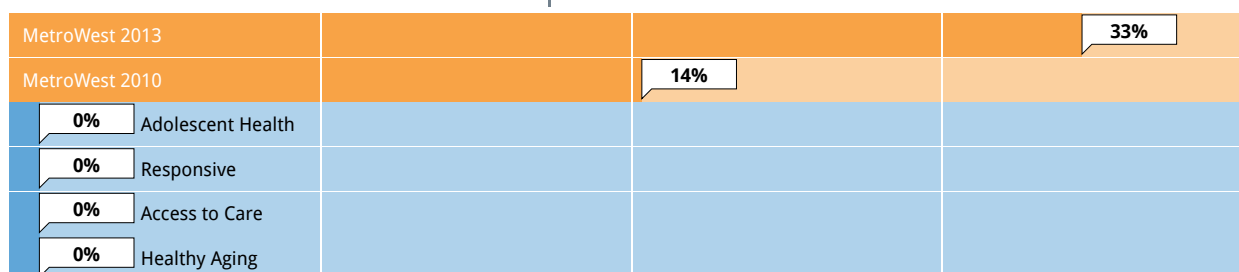
Cohort: Custom Cohort   Past results: ● On ○ Off   Subgroup: Initiative

"Did the Foundation conduct a site visit during the course of this grant?"

Proportion of grantees responding 'Yes'

0th (7%)	25th (36%)	50th (51%)	75th (69%)	100th (100%)

MetroWest 2016 **73%** **79th**

Custom Cohort

MetroWest 2013		59%		
MetroWest 2010				83%
MetroWest 2007		61%		
Adolescent Health			75%	
Responsive		50%		
Access to Care				89%
Healthy Aging				86%
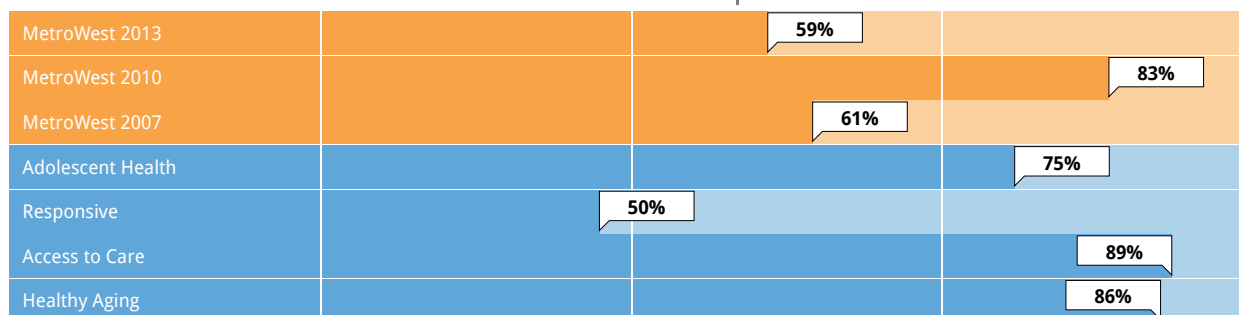
Cohort: Custom Cohort   Past results: ● On ○ Off   Subgroup: Initiative

Foundation Communication

"How clearly has the Foundation communicated its goals and strategy to you?"

1 = Not at all clearly   **7** = Extremely clearly

0th (3.65)	25th (5.48)	50th (5.73)	75th (6.00)	100th (6.57)

MetroWest 2016	**6.27** **94th**

Custom Cohort

MetroWest 2013	**6.18**
MetroWest 2010	**6.08**
MetroWest 2007	**6.17**
Adolescent Health	**6.12**
Responsive	**6.21**
Access to Care	**6.44**
Healthy Aging	**6.50**
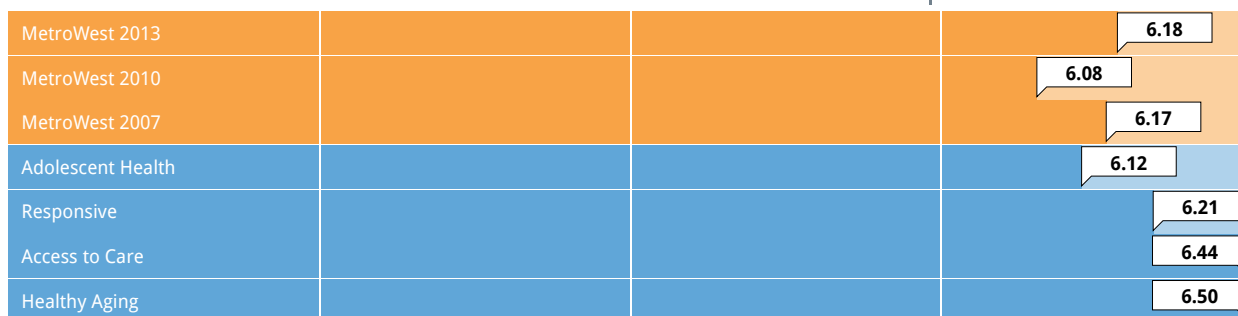
Cohort: Custom Cohort ▼   **Past results:** ◉ On ○ Off   **Subgroup:** Initiative ▼

"How consistent was the information provided by different communications resources, both personal and written, that you used to learn about the Foundation?"

1 = Not at all consistent   **7** = Completely consistent

0th (3.89)	25th (5.81)	50th (6.03)	75th (6.21)	100th (6.69)

MetroWest 2016	**6.19** **74th**

Custom Cohort

MetroWest 2013	**6.19**
MetroWest 2010	**6.08**
MetroWest 2007	**6.23**
Adolescent Health	**5.88**
Responsive	**6.23**
Access to Care	**6.43**
Healthy Aging	**6.57**

Cohort: Custom Cohort ▼   **Past results:** ◉ On ○ Off   **Subgroup:** Initiative ▼

25
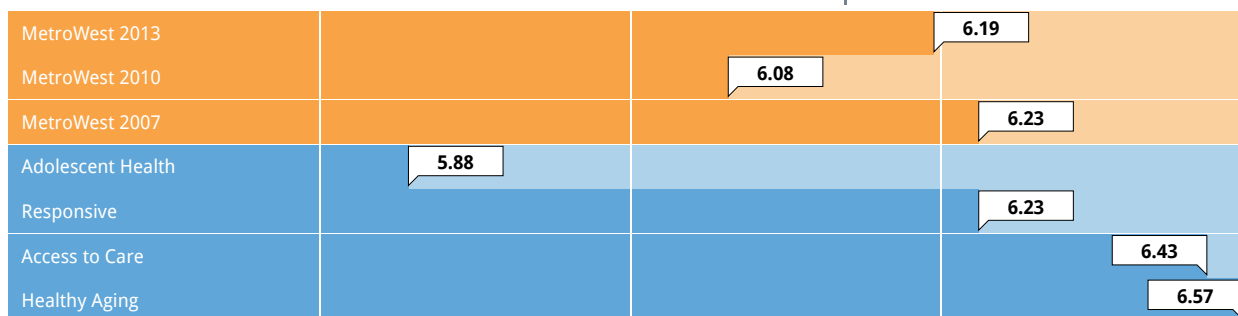
Communication Resources

Grantees were asked whether they used each of the following communications resources from MetroWest and how helpful they found each resource. This chart shows the proportion of grantees who have used each resource.

"Please indicate whether you used any of the following resources, and if so how helpful you found each."

Usage of Communication Resources - Overall

■ MetroWest 2016 ■ MetroWest 2013 ■ MetroWest 2010 ■ MetroWest 2007 ■ Custom Cohort ■ Median Funder

Website

MetroWest 2016	98%
MetroWest 2013	84%
MetroWest 2010	96%
MetroWest 2007	86%
Custom Cohort	87%
Median Funder	81%

Funding Guidelines

MetroWest 2016	79%
MetroWest 2013	82%
MetroWest 2010	76%
MetroWest 2007	83%
Custom Cohort	73%
Median Funder	68%

Annual Report

MetroWest 2016	45%
MetroWest 2013	34%
MetroWest 2010	48%
MetroWest 2007	49%
Custom Cohort	31%
Median Funder	29%

Individual Communications

MetroWest 2016	89%
MetroWest 2013	91%
MetroWest 2010	80%
MetroWest 2007	79%
Custom Cohort	89%
Median Funder	89%

The chart below shows the perceived helpfulness of each resource, where 1 = "Not at all helpful" and 7 = "Extremely helpful."

Helpfulness of Communication Resources - Overall

■ MetroWest 2016　■ MetroWest 2013　■ MetroWest 2010　■ MetroWest 2007　■ Custom Cohort　■ Median Funder

Website

MetroWest 2016	5.78
MetroWest 2013	5.44
MetroWest 2010	6.00
MetroWest 2007	5.87
Custom Cohort	5.82
Median Funder	5.65

Funding Guidelines

MetroWest 2016	6.00
MetroWest 2013	6.14
MetroWest 2010	6.22
MetroWest 2007	6.10
Custom Cohort	6.14
Median Funder	5.96

Annual Report

MetroWest 2016	5.71
MetroWest 2013	4.73
MetroWest 2010	5.67
MetroWest 2007	4.91
Custom Cohort	5.37
Median Funder	5.29

Individual Communications

MetroWest 2016	6.68
MetroWest 2013	6.60
MetroWest 2010	6.40
MetroWest 2007	6.60
Custom Cohort	6.56
Median Funder	6.55

Usage of Foundation-Specific Communication Resources - Overall

■ MetroWest 2016

Metrowest Health Foundation's new grantee meeting
MetroWest 2016 — **55%**

Metrowest Health Foundation's bidder's conference
MetroWest 2016 — **51%**

Metrowest Health Foundation's convenings
MetroWest 2016 — **38%**

Webinars created by MetroWest Health Foundation
MetroWest 2016 — **4%**

Facebook pages from MetroWest Health Foundation
MetroWest 2016 — **4%**

Helpfulness of Foundation-Specific Communication Resources - Overall

■ MetroWest 2016

Metrowest Health Foundation's convenings
MetroWest 2016 — **6.06**

Metrowest Health Foundation's new grantee meeting
MetroWest 2016 — **5.84**

Metrowest Health Foundation's bidder's conference
MetroWest 2016 — **5.48**

Helpfulness of the following communication resources is not displayed as too few MetroWest grantees provided ratings: Webinars created by MetroWest Health Foundation, and Facebook pages from MetroWest Health Foundation.

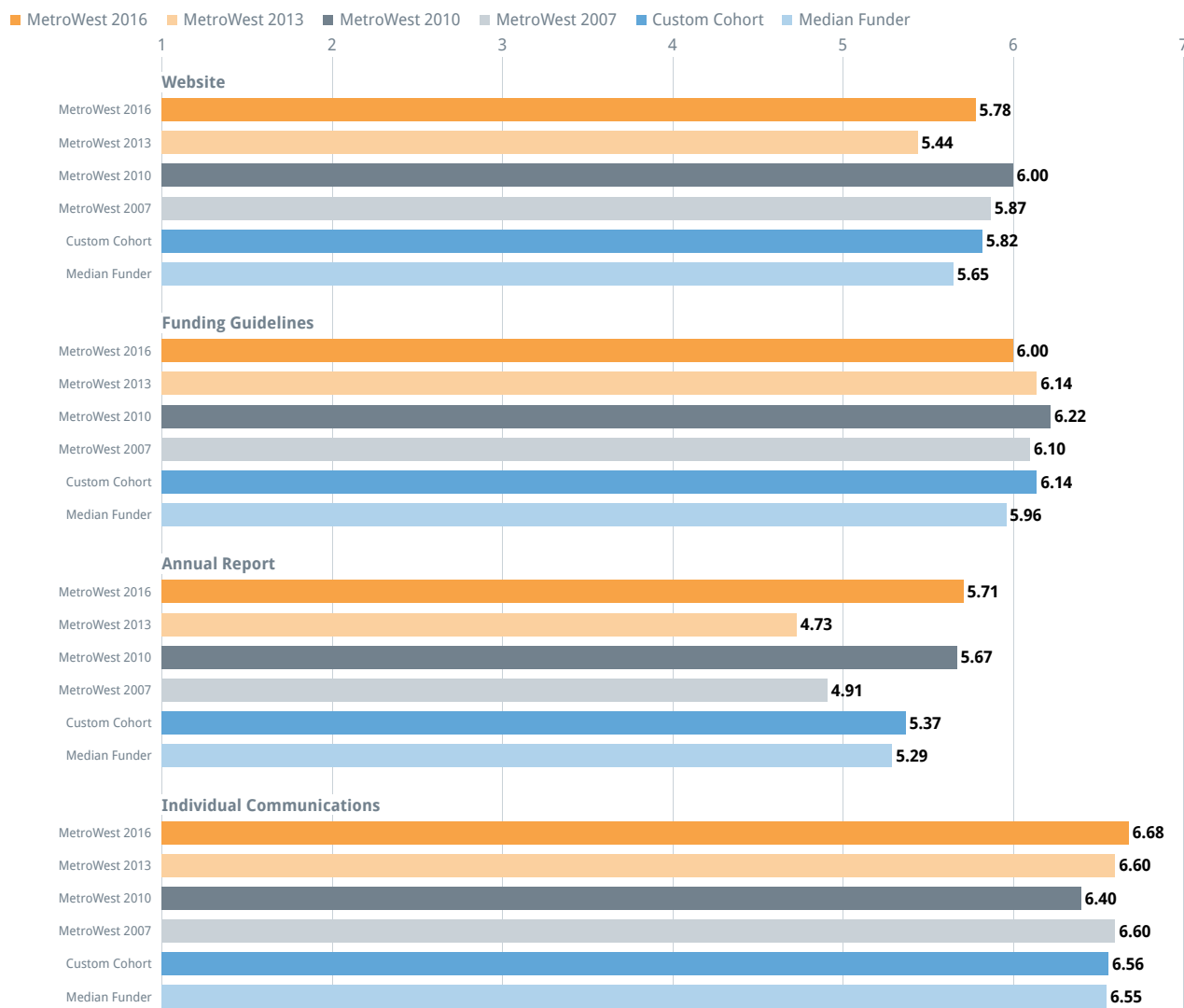The following charts show the usage and helpfulness of communications resources segmented by subgroup.

"Please indicate whether you used any of the following resources, and if so how helpful you found each."
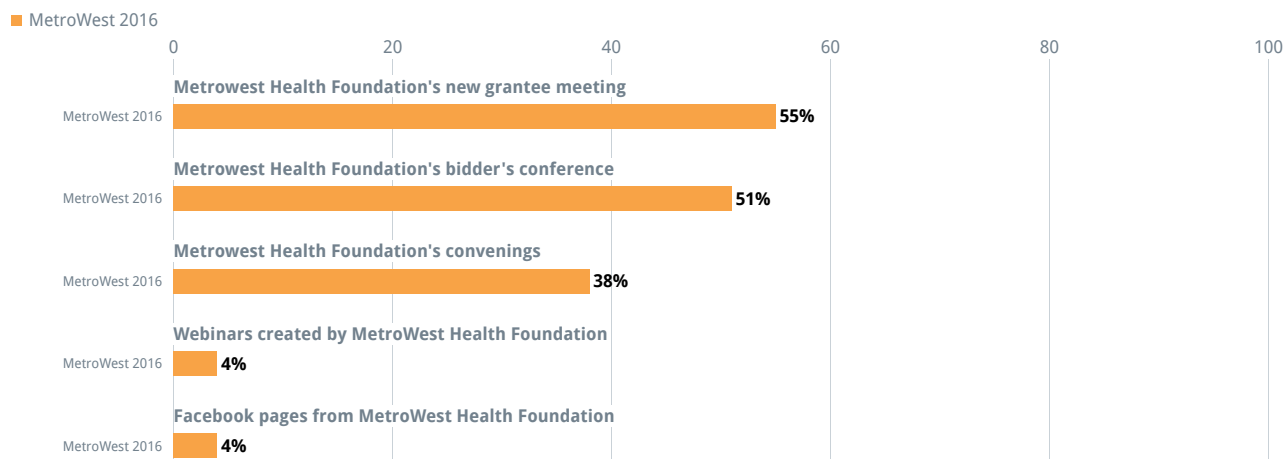
Usage of Communication Resources - By Subgroup

Legend: Adolescent Health, Responsive, Access to Care, Healthy Aging

Website
- Adolescent Health: 100%
- Responsive: 100%
- Access to Care: 89%
- Healthy Aging: 100%

Funding Guidelines
- Adolescent Health: 71%
- Responsive: 85%
- Access to Care: 78%
- Healthy Aging: 88%

Annual Report
- Adolescent Health: 41%
- Responsive: 31%
- Access to Care: 56%
- Healthy Aging: 63%

Individual Communications
- Adolescent Health: 82%
- Responsive: 92%
- Access to Care: 89%
- Healthy Aging: 100%

Helpfulness of Communication Resources - By Subgroup

■ Adolescent Health ■ Responsive ■ Access to Care ■ Healthy Aging

Website

Adolescent Health	5.76
Responsive	5.69
Access to Care	5.88
Healthy Aging	5.88

Funding Guidelines

Adolescent Health	6.08
Responsive	5.36
Access to Care	6.29
Healthy Aging	6.57

Annual Report

Adolescent Health	5.71
Responsive	N/A
Access to Care	5.80
Healthy Aging	6.00

Individual Communications

Adolescent Health	6.50
Responsive	6.75
Access to Care	6.75
Healthy Aging	6.86

Usage of Foundation-Specific Communication Resources - By Subgroup

■ Adolescent Health ■ Responsive ■ Access to Care ■ Healthy Aging

Metrowest Health Foundation's new grantee meeting

Subgroup	Value
Adolescent Health	59%
Responsive	54%
Access to Care	56%
Healthy Aging	50%

Metrowest Health Foundation's bidder's conference

Subgroup	Value
Adolescent Health	41%
Responsive	54%
Access to Care	33%
Healthy Aging	88%

Metrowest Health Foundation's convenings

Subgroup	Value
Adolescent Health	41%
Responsive	38%
Access to Care	33%
Healthy Aging	38%

Webinars created by MetroWest Health Foundation

Subgroup	Value
Adolescent Health	6%
Responsive	8%
Access to Care	0%
Healthy Aging	0%

Facebook pages from MetroWest Health Foundation

Subgroup	Value
Adolescent Health	6%
Responsive	8%
Access to Care	0%
Healthy Aging	0%

Helpfulness of Foundation-Specific Communication Resources - By Subgroup

■ Adolescent Health ■ Responsive ■ Access to Care ■ Healthy Aging

Metrowest Health Foundation's convenings

Subgroup	Value
Adolescent Health	5.86
Responsive	6.00
Access to Care	N/A
Healthy Aging	N/A

Metrowest Health Foundation's new grantee meeting

Subgroup	Value
Adolescent Health	5.60
Responsive	6.14
Access to Care	5.20
Healthy Aging	N/A

Metrowest Health Foundation's bidder's conference

Subgroup	Value
Adolescent Health	5.00
Responsive	4.86
Access to Care	N/A
Healthy Aging	6.00

Funder Transparency

"Overall how transparent is the Foundation with your organization?"

1 = Not at all transparent   **7** = Extremely transparent

	0th (3.69)	25th (5.43)	50th (5.61)	75th (5.88)	100th (6.29)
MetroWest 2016				**5.89** 76th	

Custom Cohort

MetroWest 2013			6.02	
Adolescent Health		5.56		
Responsive			5.93	
Access to Care				6.33
Healthy Aging			6.00	

Cohort: [Custom Cohort ▼]   **Past results:** ● On ○ Off   **Subgroup:** [Initiative ▼]

Grantees were asked to rate how transparent MetroWest is in the following areas, where 1 = "Not at all transparent" and 7 = "Extremely transparent."

Foundation Transparency - Overall

■ MetroWest 2016   ■ MetroWest 2013   ■ Custom Cohort   ■ Median Funder

Best practices the Foundation has learned - through its work or through others' work - about the issue areas it funds

MetroWest 2016	5.69
MetroWest 2013	6.00
Custom Cohort	5.72
Median Funder	5.22

Changes that affect the funding grantees might receive in the future

MetroWest 2016	5.56
MetroWest 2013	5.83
Custom Cohort	5.57
Median Funder	5.21

Foundation's processes for selecting grantees

MetroWest 2016	5.79
MetroWest 2013	5.90
Custom Cohort	5.74
Median Funder	5.21

Foundation's experience with what it has tried but has not worked in its past grantmaking

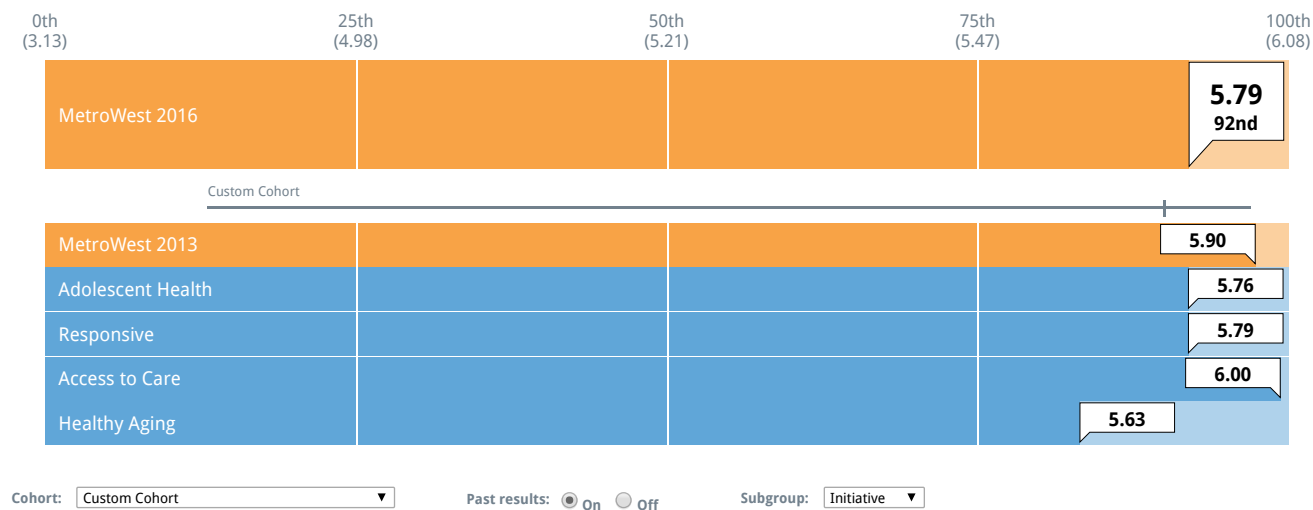|	
MetroWest 2016	5.17
MetroWest 2013	5.39
Custom Cohort	5.19
Median Funder	4.52

Aspects of Funder Transparency

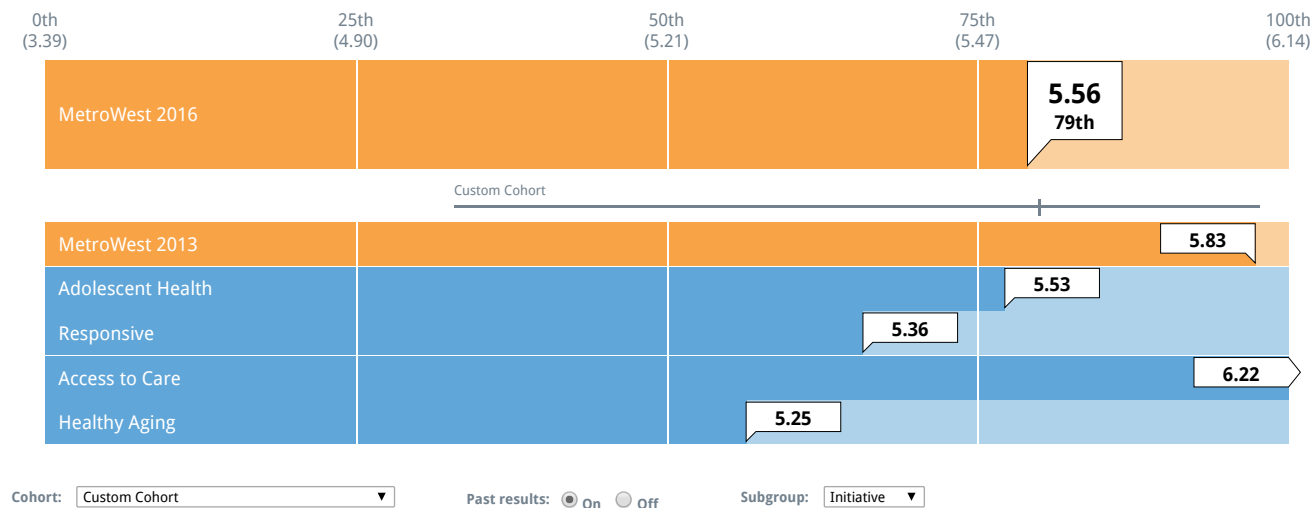The charts below show grantee ratings of MetroWest's transparency in specific areas of its work.

The Foundation's processes for selecting grantees

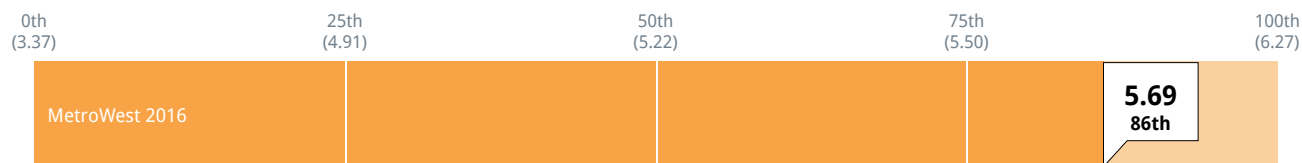**1** = Not at all transparent   **7** = Extremely transparent

0th (3.13)	25th (4.98)	50th (5.21)	75th (5.47)	100th (6.08)

MetroWest 2016 — **5.79** / **92nd**

Custom Cohort

MetroWest 2013	**5.90**
Adolescent Health	**5.76**
Responsive	**5.79**
Access to Care	**6.00**
Healthy Aging	**5.63**

Cohort: Custom Cohort ▼   **Past results:** ⦿ On ○ Off   **Subgroup:** Initiative ▼

Any changes that affect the funding your organization might receive in the future

1 = Not at all transparent   **7** = Extremely transparent

0th (3.39)	25th (4.90)	50th (5.21)	75th (5.47)	100th (6.14)

MetroWest 2016 — **5.56** / **79th**

Custom Cohort

MetroWest 2013	**5.83**
Adolescent Health	**5.53**
Responsive	**5.36**
Access to Care	**6.22**
Healthy Aging	**5.25**

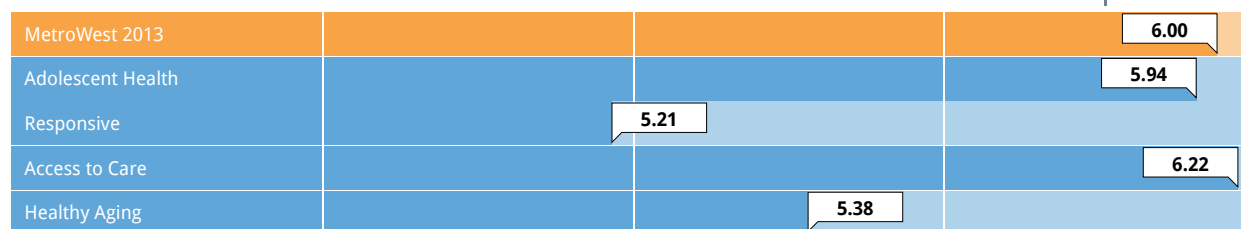**Cohort:** Custom Cohort ▼   **Past results:** ⦿ On ○ Off   **Subgroup:** Initiative ▼

Best practices the Foundation has learned - through its work or through others' work - about the issue areas it funds

1 = Not at all transparent   **7** = Extremely transparent
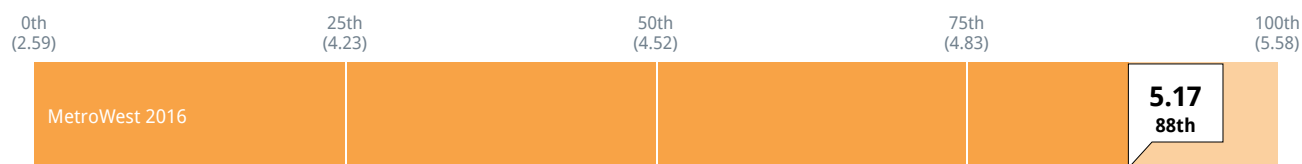
0th (3.37)	25th (4.91)	50th (5.22)	75th (5.50)	100th (6.27)

MetroWest 2016 — **5.69** / **86th**

Custom Cohort

MetroWest 2013				**6.00**
Adolescent Health				**5.94**
Responsive		**5.21**		
Access to Care				**6.22**
Healthy Aging			**5.38**	

Cohort: Custom Cohort ▾   Past results: ● On ○ Off   Subgroup: Initiative ▾

The Foundation's experiences with what it has tried but has not worked in its past grantmaking

1 = Not at all transparent   **7** = Extremely transparent

0th (2.59)	25th (4.23)	50th (4.52)	75th (4.83)	100th (5.58)

MetroWest 2016 — **5.17** / **88th**

Custom Cohort

MetroWest 2013				**5.39**
Adolescent Health				**5.19**
Responsive				**5.29**
Access to Care				**5.56**
Healthy Aging		**4.50**		
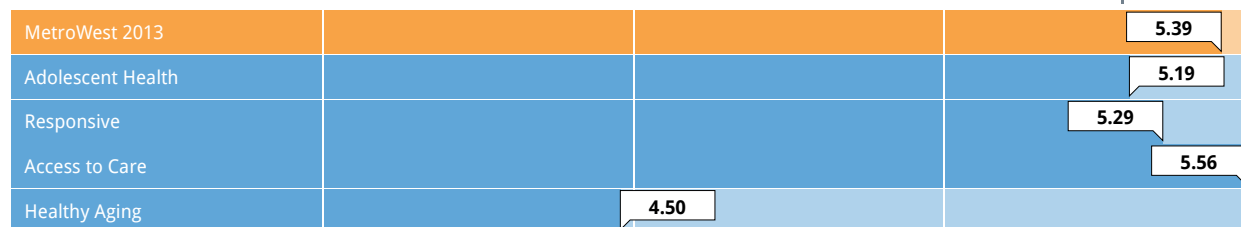
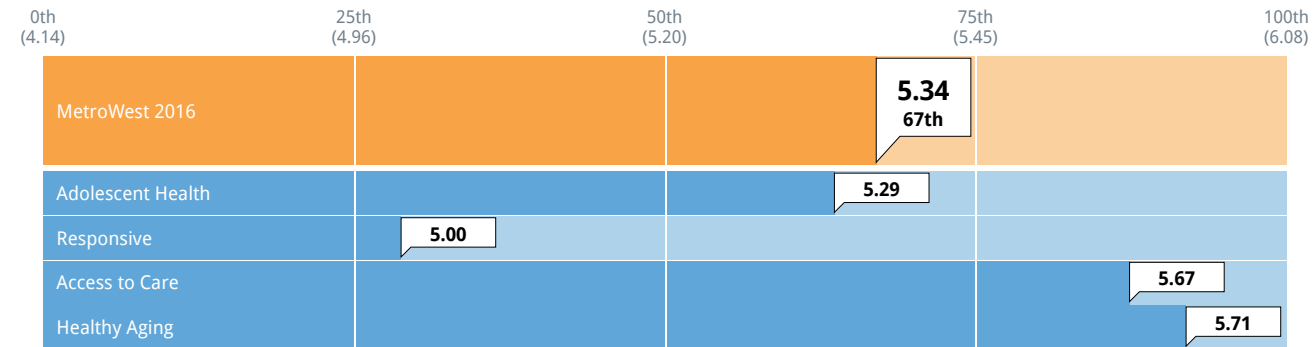Cohort: Custom Cohort ▾   Past results: ● On ○ Off   Subgroup: Initiative ▾

Openness

The following question was recently added to the grantee survey and depicts comparative data from fewer than one-third of funders in the dataset.

"To what extent is the Foundation open to ideas from grantees about its strategy?"

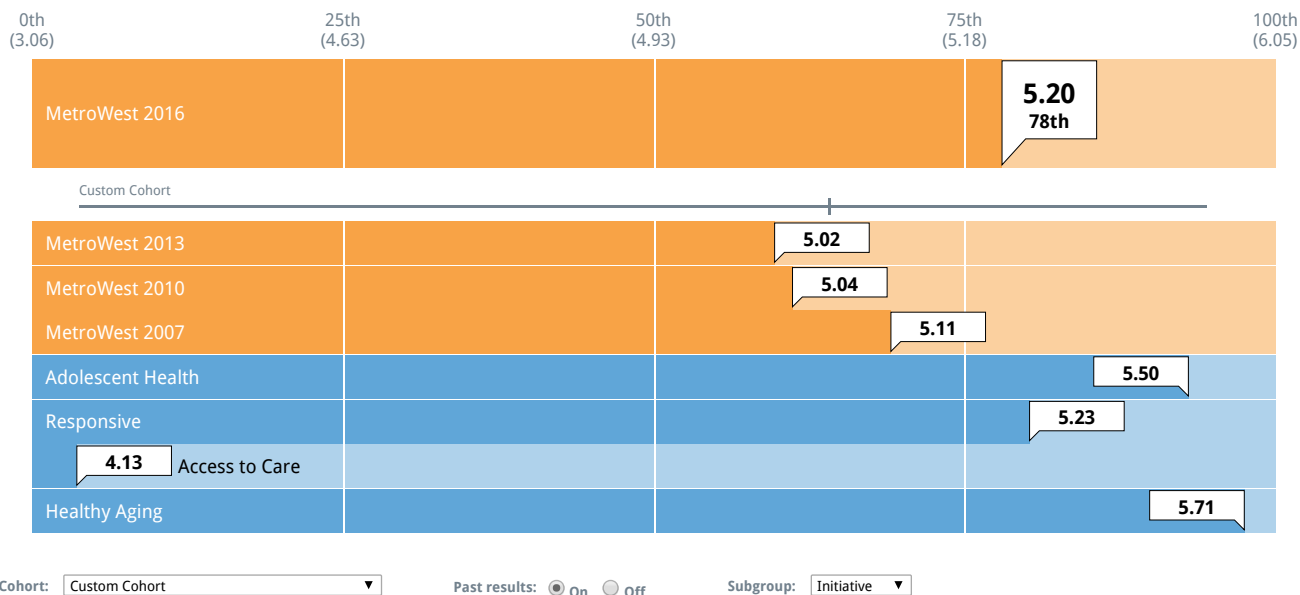**1** = Not at all   **7** = To a great extent

	0th (4.14)	25th (4.96)	50th (5.20)	75th (5.45)	100th (6.08)
MetroWest 2016				**5.34** **67th**	
Adolescent Health			**5.29**		
Responsive	**5.00**				
Access to Care				**5.67**	
Healthy Aging				**5.71**	

Cohort: [None ▾]   Past results: ⦿ On ◯ Off   Subgroup: [Initiative ▾]
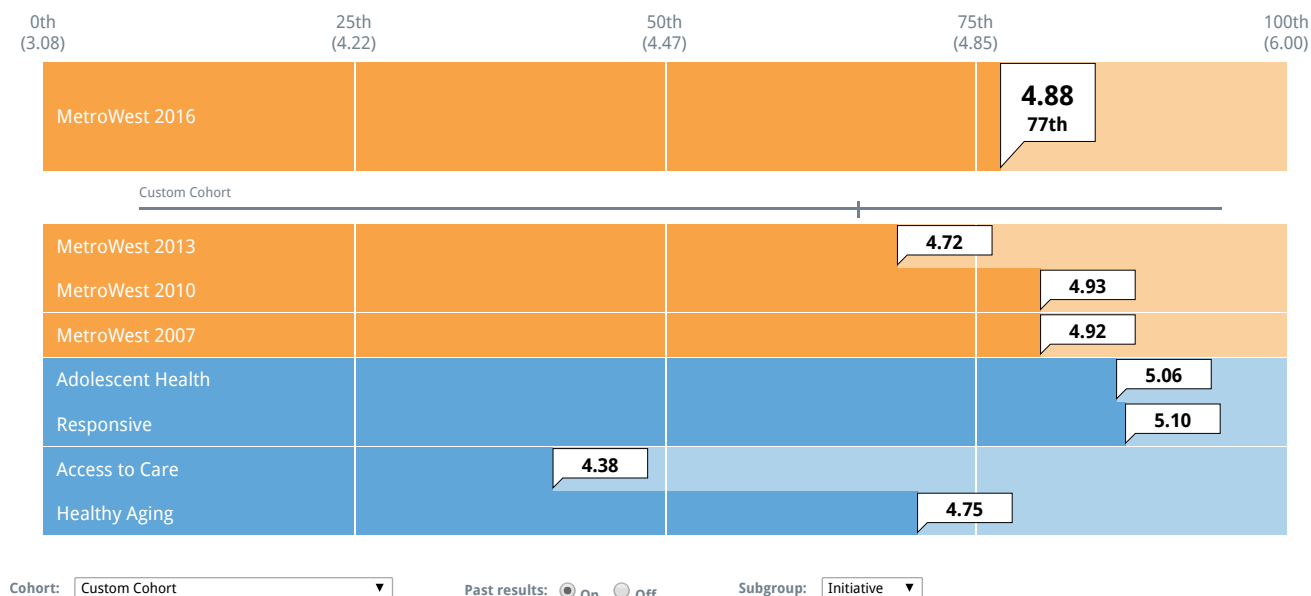
Grant Processes

"How helpful was participating in the Foundation's selection process in strengthening the organization/program funded by the grant?"

1 = Not at all helpful   **7** = Extremely helpful

0th (3.06)	25th (4.63)	50th (4.93)	75th (5.18)	100th (6.05)

MetroWest 2016 — **5.20** / **78th**

Custom Cohort

MetroWest 2013 — **5.02**
MetroWest 2010 — **5.04**
MetroWest 2007 — **5.11**
Adolescent Health — **5.50**
Responsive — **5.23**
4.13 Access to Care
Healthy Aging — **5.71**

Cohort: [Custom Cohort ▾]   Past results: ◉ On ○ Off   Subgroup: [Initiative ▾]

"How helpful was participating in the Foundation's reporting/evaluation process in strengthening the organization/program funded by the grant?"
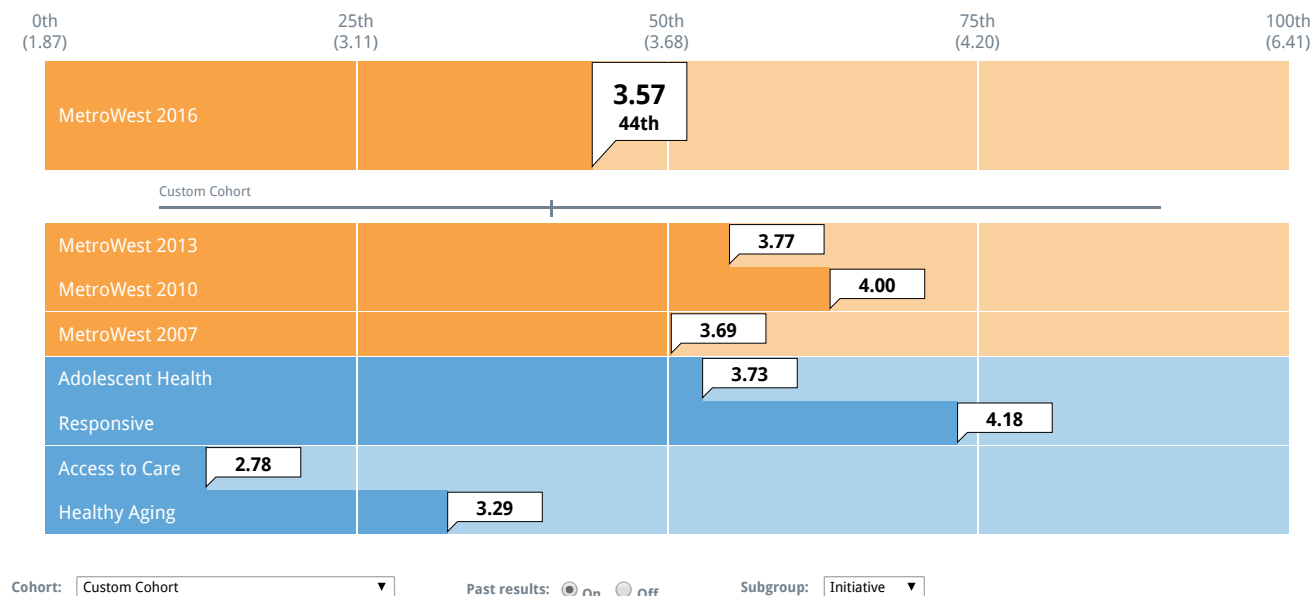
1 = Not at all helpful   **7** = Extremely helpful

0th (3.08)	25th (4.22)	50th (4.47)	75th (4.85)	100th (6.00)

MetroWest 2016 — **4.88** / **77th**

Custom Cohort

MetroWest 2013 — **4.72**
MetroWest 2010 — **4.93**
MetroWest 2007 — **4.92**
Adolescent Health — **5.06**
Responsive — **5.10**
Access to Care — **4.38**
Healthy Aging — **4.75**

Cohort: [Custom Cohort ▾]   Past results: ◉ On ○ Off   Subgroup: [Initiative ▾]

Selection Process

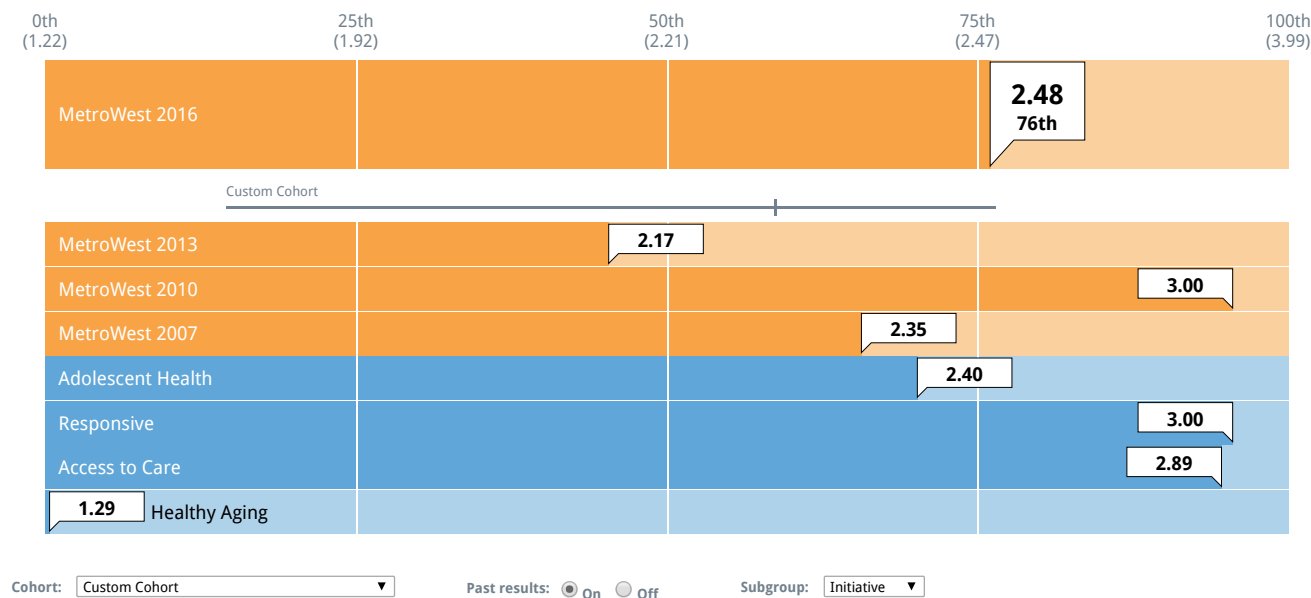| Did you submit a proposal for this grant? (Overall)	MetroWest 2016	MetroWest 2013	MetroWest 2010	MetroWest 2007	Average Funder	Custom Cohort
Submitted a Proposal	88%	91%	88%	97%	94%	94%
Did Not Submit a Proposal	13%	9%	12%	3%	6%	6%

"How involved was the Foundation staff in the development of your proposal?"

1 = No involvement   **7** = Substantial involvement

0th (1.87)	25th (3.11)	50th (3.68)	75th (4.20)	100th (6.41)

MetroWest 2016 — **3.57** 44th

Custom Cohort

MetroWest 2013 — **3.77**
MetroWest 2010 — **4.00**
MetroWest 2007 — **3.69**
Adolescent Health — **3.73**
Responsive — **4.18**
Access to Care — **2.78**
Healthy Aging — **3.29**

Cohort: Custom Cohort ▼   Past results: ● On ○ Off   Subgroup: Initiative ▼

"As you developed your grant proposal, how much pressure did you feel to modify your organization's priorities in order to create a grant proposal that was likely to receive funding?"

1 = No pressure   **7** = Significant pressure

0th (1.22)	25th (1.92)	50th (2.21)	75th (2.47)	100th (3.99)

MetroWest 2016 — **2.48** 76th

Custom Cohort

MetroWest 2013 — **2.17**
MetroWest 2010 — **3.00**
MetroWest 2007 — **2.35**
Adolescent Health — **2.40**
Responsive — **3.00**
Access to Care — **2.89**
Healthy Aging — **1.29**

Cohort: Custom Cohort ▼   Past results: ● On ○ Off   Subgroup: Initiative ▼

Time Between Submission and Clear Commitment

"How much time elapsed from the submission of the grant proposal to clear commitment of funding?"
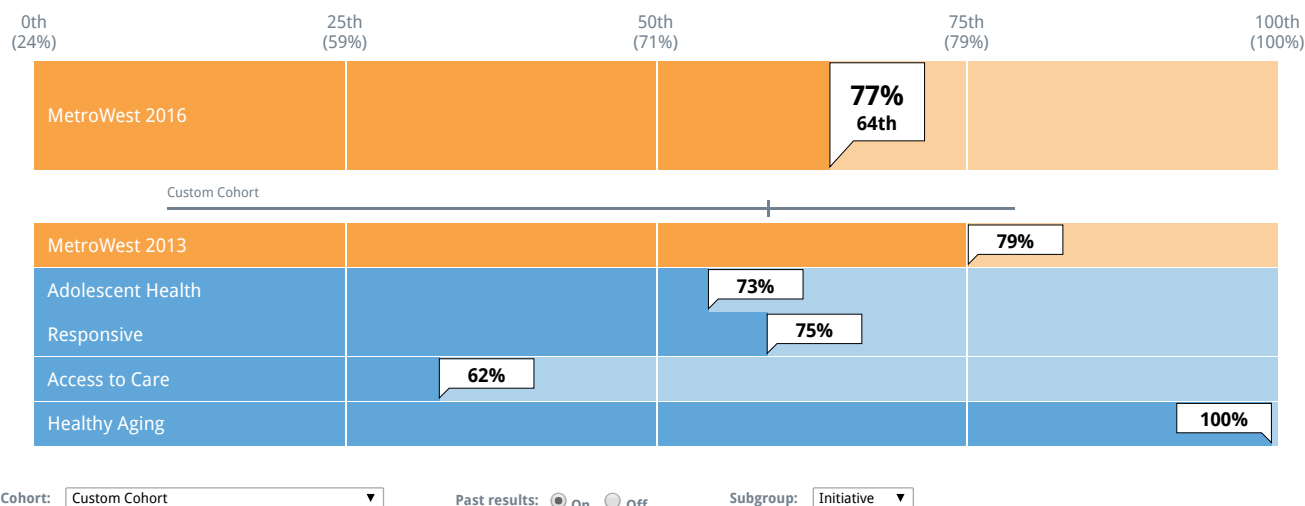
Time Elapsed from Submission of Proposal to Clear Commitment of Funding (Overall)	MetroWest 2016	MetroWest 2013	MetroWest 2010	MetroWest 2007	Average Funder	Custom Cohort
Less than 1 month	3%	11%	0%	2%	6%	6%
1 - 3 months	81%	78%	80%	83%	55%	63%
4 - 6 months	14%	11%	15%	14%	30%	27%
7 - 9 months	3%	0%	5%	2%	5%	3%
10 - 12 months	0%	0%	0%	0%	2%	0%
More than 12 months	0%	0%	0%	0%	2%	1%

Time Elapsed from Submission of Proposal to Clear Commitment of Funding (By Subgroup)	Adolescent Health	Responsive	Access to Care	Healthy Aging
Less than 1 month	8%	0%	0%	0%
1 - 3 months	92%	80%	75%	67%
4 - 6 months	0%	20%	13%	33%
7 - 9 months	0%	0%	13%	0%
10 - 12 months	0%	0%	0%	0%
More than 12 months	0%	0%	0%	0%

Reporting and Evaluation Process

> "At any point during the application or the grant period, did the Foundation and your organization exchange ideas regarding how your organization would assess the results of the work funded by this grant?"

Proportion responding 'Yes'

	0th (24%)	25th (59%)	50th (71%)	75th (79%)	100th (100%)

MetroWest 2016 — 77% / 64th

Custom Cohort

MetroWest 2013	79%
Adolescent Health	73%
Responsive	75%
Access to Care	62%
Healthy Aging	100%

Cohort: Custom Cohort ▼   Past results: ● On ○ Off   Subgroup: Initiative ▼

Participation in Reporting and/or Evaluation Processes (Overall)	MetroWest 2016	MetroWest 2013	MetroWest 2010	MetroWest 2007	Average Funder	Custom Cohort
Participated in a reporting and/or evaluation process	92%	82%	90%	76%	57%	67%
There will be a report/evaluation but it has not occurred yet	4%	14%	8%	24%	35%	27%
There was/will be no report/evaluation	4%	2%	0%	0%	5%	4%
Don't know	0%	2%	2%	0%	3%	2%

The following question was recently added to the grantee survey and depicts comparative data from fewer than one-third of funders in the dataset.

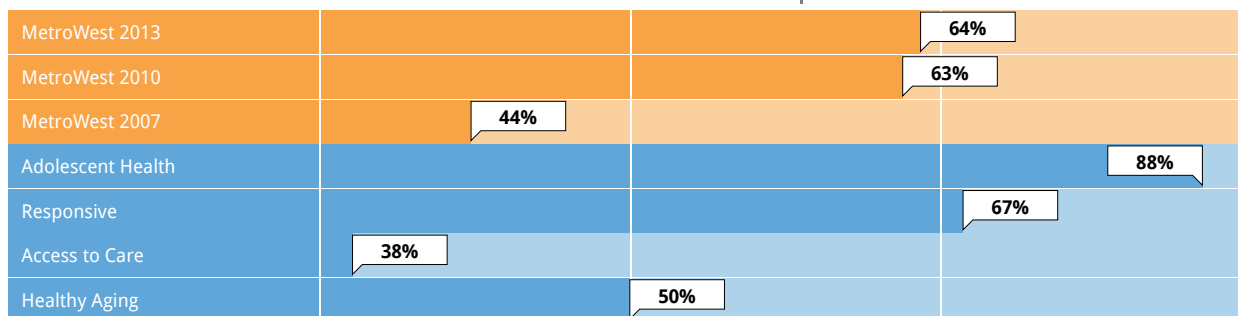| Was an external evaluator involved in your reporting/evaluation process? (Overall)	MetroWest 2016	Average Funder
Yes, chosen by the Foundation	18%	15%
Yes, chosen by our organization	5%	9%
No	76%	76%

"After submission of your report/evaluation, did the Foundation or the evaluator discuss it with you?"

Proportion responding 'Yes'

	0th (7%)	25th (36%)	50th (50%)	75th (65%)	100th (100%)
MetroWest 2016				66% 76th	

Custom Cohort

MetroWest 2013	64%
MetroWest 2010	63%
MetroWest 2007	44%
Adolescent Health	88%
Responsive	67%
Access to Care	38%
Healthy Aging	50%

Cohort: Custom Cohort   Past results: ● On ○ Off   Subgroup: Initiative

"How helpful has the Foundation been to your organization's ability to assess progress towards your organization's goals?"

1 = Not at all helpful   7 = Extremely helpful

	0th (3.45)	25th (4.84)	50th (5.06)	75th (5.29)	100th (5.94)
MetroWest 2016				5.40 80th	

Custom Cohort

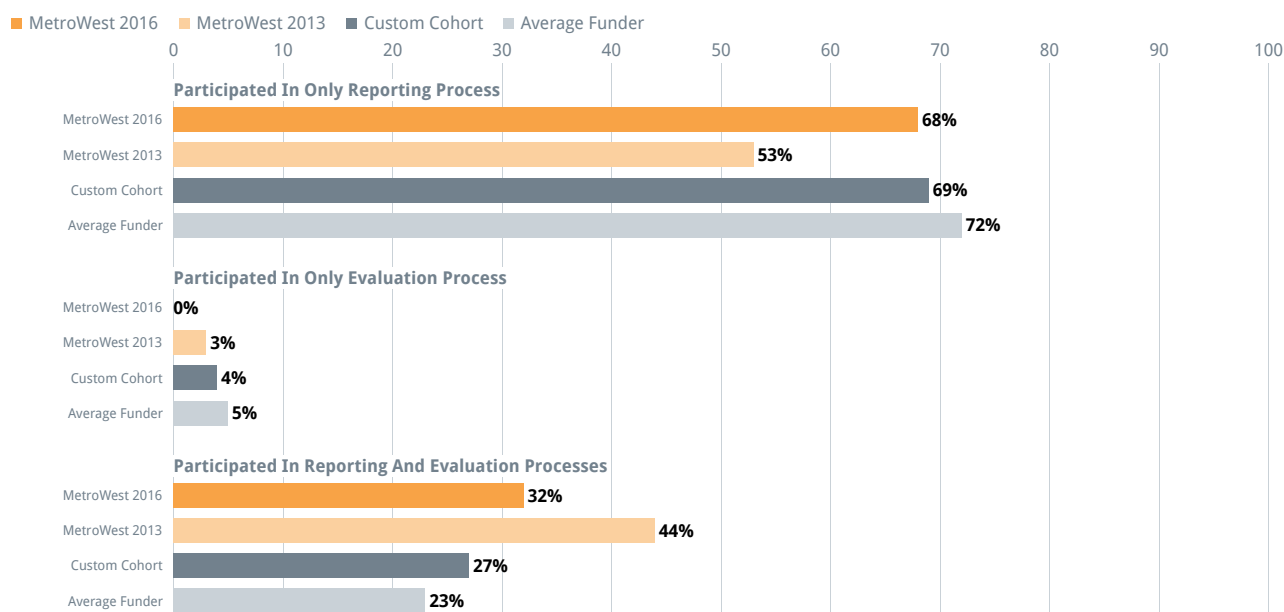| MetroWest 2013 | 5.40 |
Adolescent Health	5.31
Responsive	5.14
Access to Care	5.78
Healthy Aging	5.63
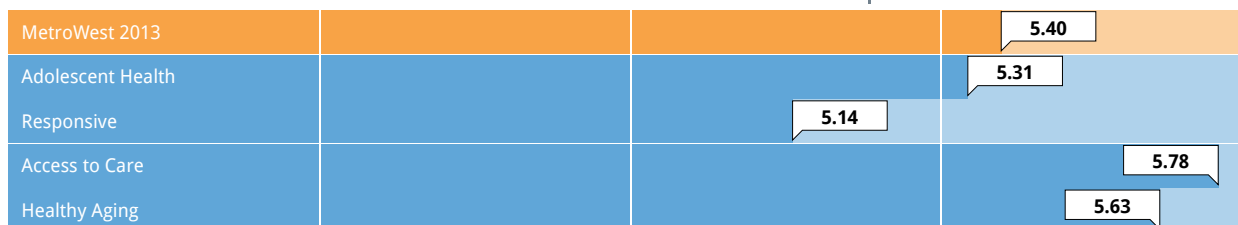
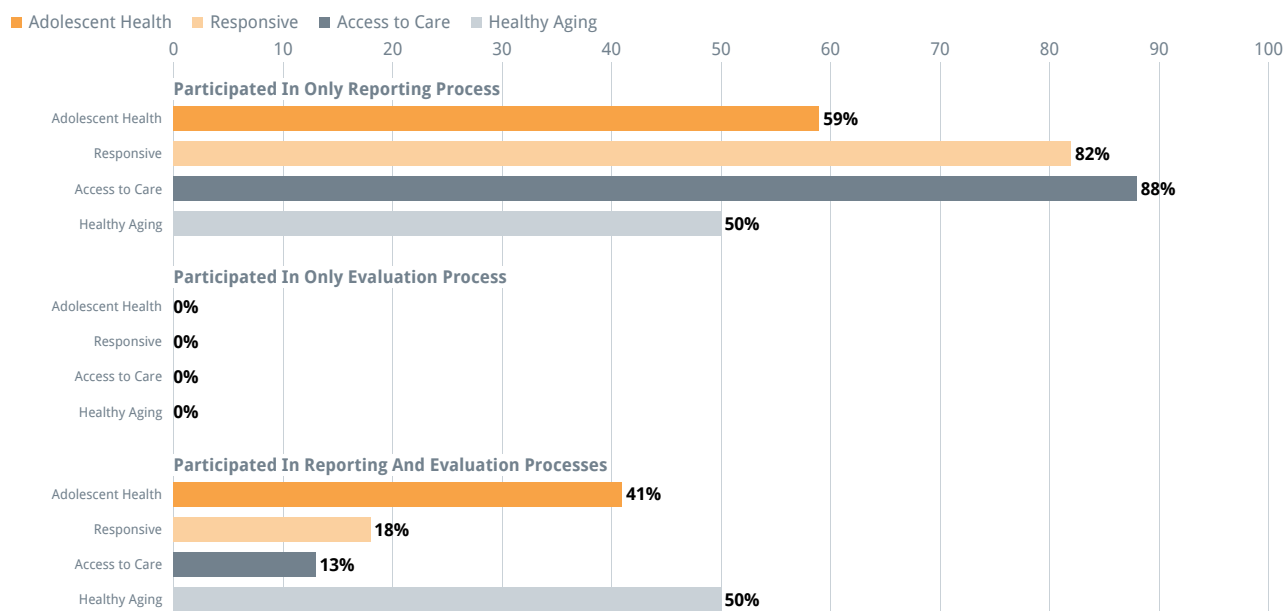Cohort: Custom Cohort   Past results: ● On ○ Off   Subgroup: Initiative

Reporting and Evaluation Process Activities

"Which reporting/evaluation process activities were a part of your process?"
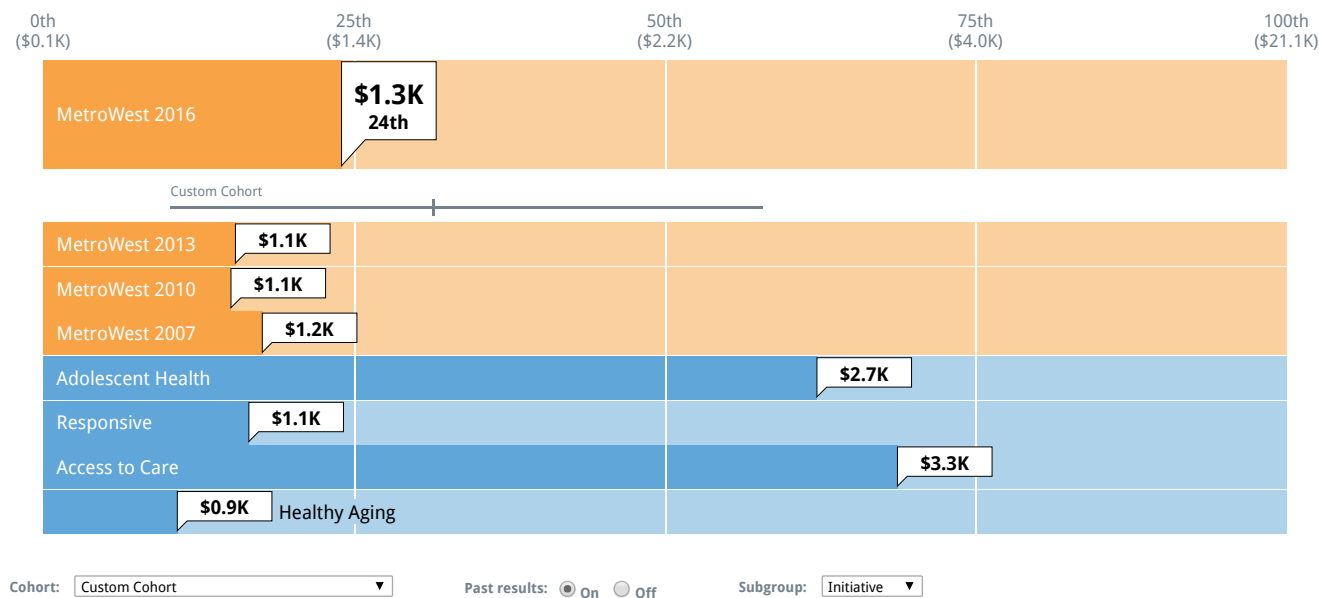
Reporting and Evaluation Process Activities

■ MetroWest 2016 ■ MetroWest 2013 ■ Custom Cohort ■ Average Funder

Participated In Only Reporting Process

MetroWest 2016	68%
MetroWest 2013	53%
Custom Cohort	69%
Average Funder	72%

Participated In Only Evaluation Process

MetroWest 2016	0%
MetroWest 2013	3%
Custom Cohort	4%
Average Funder	5%

Participated In Reporting And Evaluation Processes

MetroWest 2016	32%
MetroWest 2013	44%
Custom Cohort	27%
Average Funder	23%

Reporting and Evaluation Process Activities - By Subgroup

■ Adolescent Health ■ Responsive ■ Access to Care ■ Healthy Aging

Participated In Only Reporting Process

Adolescent Health	59%
Responsive	82%
Access to Care	88%
Healthy Aging	50%

Participated In Only Evaluation Process

Adolescent Health	0%
Responsive	0%
Access to Care	0%
Healthy Aging	0%

Participated In Reporting And Evaluation Processes

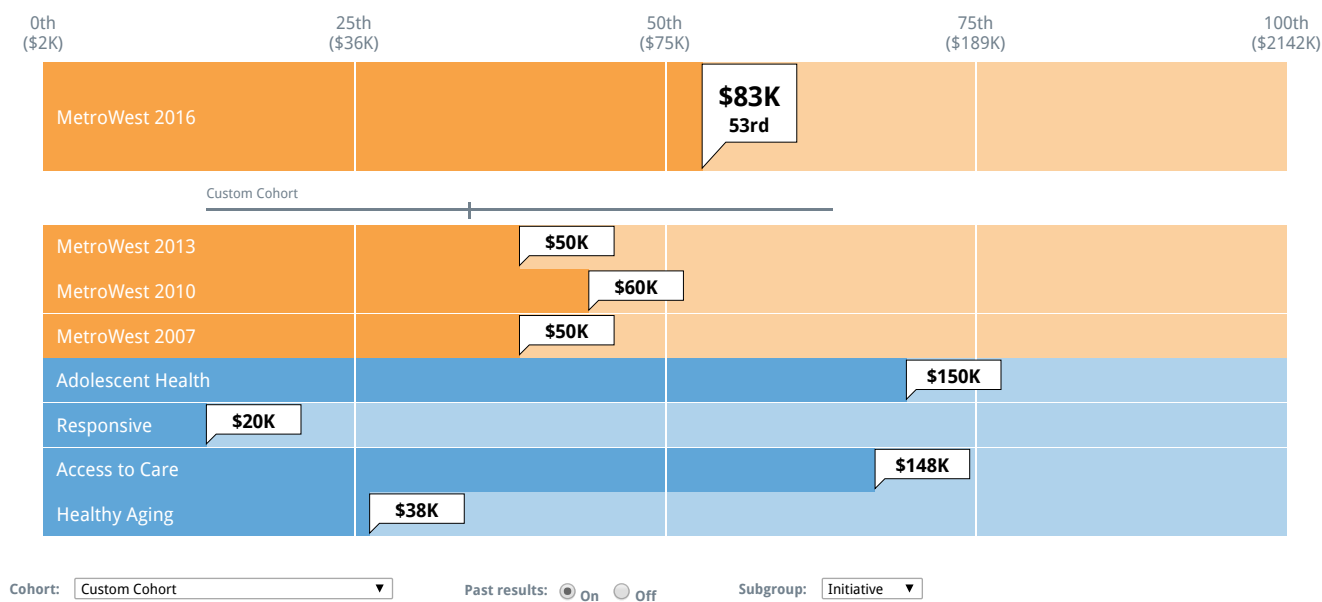|	
Adolescent Health	41%
Responsive	18%
Access to Care	13%
Healthy Aging	50%

Dollar Return and Time Spent on Processes
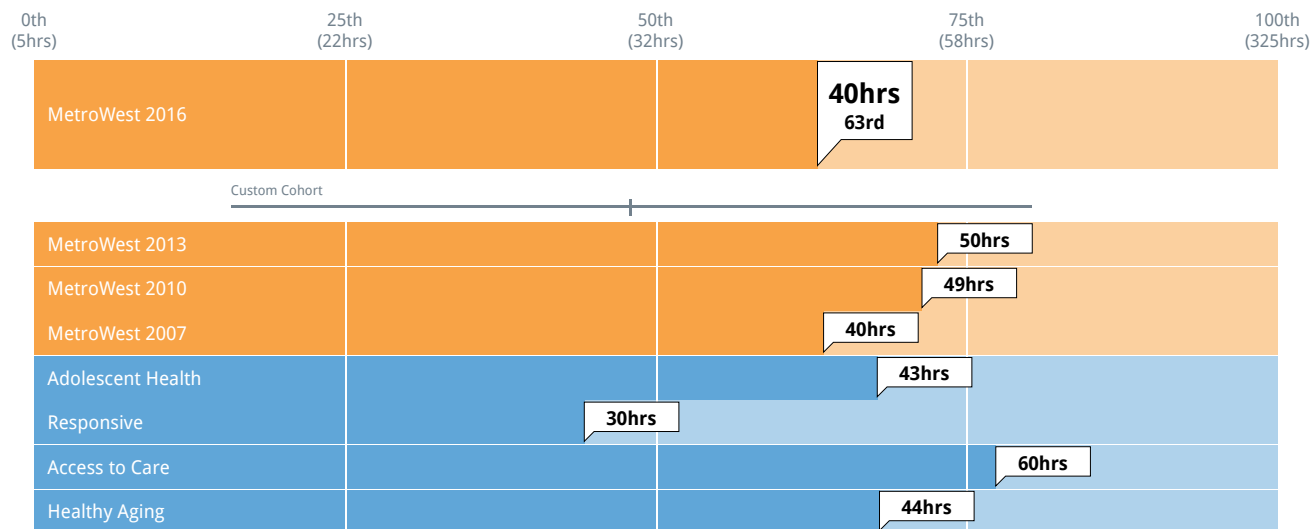
Dollar Return: Median grant dollars awarded per process hour required

Includes total grant dollars awarded and total time necessary to fulfill the requirements over the lifetime of the grant

	0th ($0.1K)	25th ($1.4K)	50th ($2.2K)	75th ($4.0K)	100th ($21.1K)
MetroWest 2016		**$1.3K** 24th			

Custom Cohort

MetroWest 2013	**$1.1K**				
MetroWest 2010	**$1.1K**				
MetroWest 2007	**$1.2K**				
Adolescent Health			**$2.7K**		
Responsive	**$1.1K**				
Access to Care			**$3.3K**		
Healthy Aging	**$0.9K**				

Cohort: [Custom Cohort ▼]   Past results: ⦿ On ○ Off   Subgroup: [Initiative ▼]

Median Grant Size

	0th ($2K)	25th ($36K)	50th ($75K)	75th ($189K)	100th ($2142K)
MetroWest 2016			**$83K** 53rd		

Custom Cohort

MetroWest 2013		**$50K**			
MetroWest 2010		**$60K**			
MetroWest 2007		**$50K**			
Adolescent Health				**$150K**	
Responsive	**$20K**				
Access to Care				**$148K**	
Healthy Aging		**$38K**			

Cohort: [Custom Cohort ▼]   Past results: ⦿ On ○ Off   Subgroup: [Initiative ▼]

Median hours spent by grantees on funder requirements over grant lifetime

	0th (5hrs)	25th (22hrs)	50th (32hrs)	75th (58hrs)	100th (325hrs)

MetroWest 2016 — **40hrs** **63rd**

Custom Cohort

MetroWest 2013 — **50hrs**
MetroWest 2010 — **49hrs**
MetroWest 2007 — **40hrs**
Adolescent Health — **43hrs**
Responsive — **30hrs**
Access to Care — **60hrs**
Healthy Aging — **44hrs**

Cohort: Custom Cohort ▼   Past results: ◉ On ○ Off   Subgroup: Initiative ▼

Median hours spent by grantees on funder requirements over grant lifetime

44

Time Spent on Selection Process

Median Hours Spent on Proposal and Selection Process

	0th (4hrs)	25th (15hrs)	50th (20hrs)	75th (30hrs)	100th (204hrs)
MetroWest 2016			**20hrs** **48th**		

Custom Cohort

MetroWest 2013			**20hrs**		
MetroWest 2010			**20hrs**		
MetroWest 2007			**20hrs**		
Adolescent Health			**20hrs**		
Responsive		**15hrs**			
Access to Care			**20hrs**		
Healthy Aging				**25hrs**	

Cohort: Custom Cohort ▼   **Past results:** ◉ On ○ Off   **Subgroup:** Initiative ▼
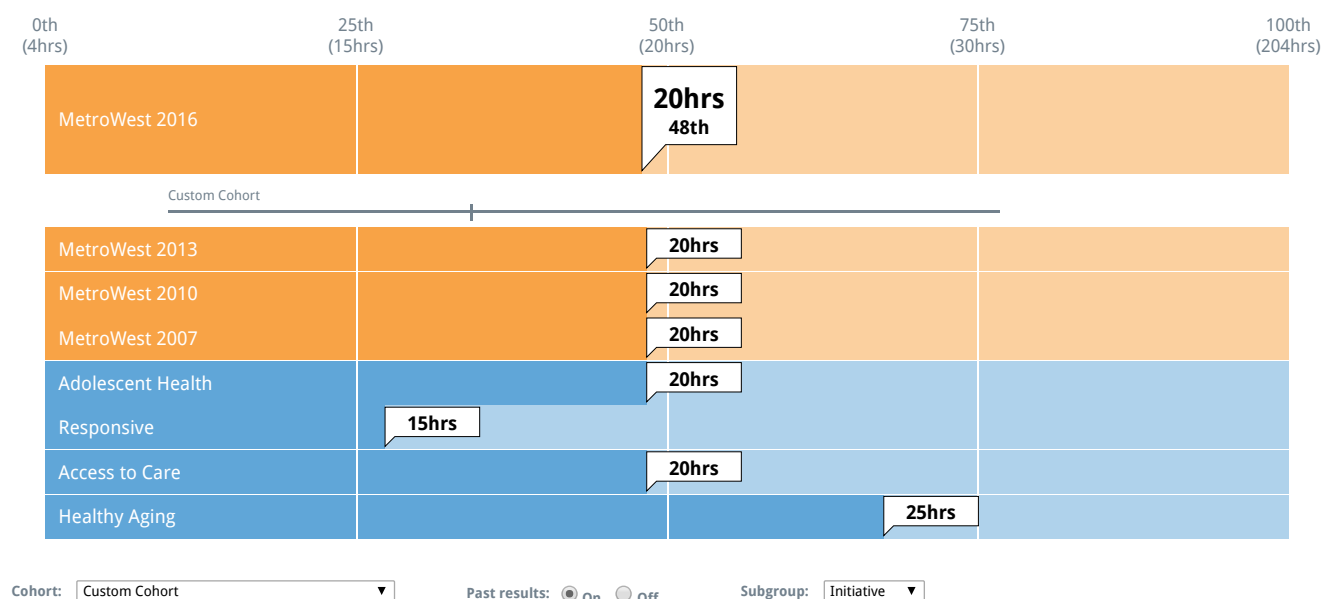
Time Spent On Proposal And Selection Process (Overall)	MetroWest 2016	MetroWest 2013	MetroWest 2010	MetroWest 2007	Average Funder	Custom Cohort
1 to 9 hours	9%	7%	9%	16%	20%	19%
10 to 19 hours	28%	35%	33%	19%	21%	27%
20 to 29 hours	30%	25%	16%	20%	18%	20%
30 to 39 hours	14%	5%	2%	3%	8%	7%
40 to 49 hours	5%	20%	24%	13%	12%	11%
50 to 99 hours	12%	3%	11%	17%	11%	11%
100 to 199 hours	2%	5%	2%	11%	6%	4%
200+ hours	0%	0%	2%	2%	3%	1%

Time Spent On Proposal And Selection Process (By Subgroup)	Adolescent Health	Responsive	Access to Care	Healthy Aging
1 to 9 hours	13%	15%	0%	0%
10 to 19 hours	20%	46%	25%	14%
20 to 29 hours	20%	23%	38%	57%
30 to 39 hours	27%	8%	0%	14%
40 to 49 hours	7%	0%	0%	14%
50 to 99 hours	13%	8%	25%	0%
100 to 199 hours	0%	0%	13%	0%
200+ hours	0%	0%	0%	0%

Time Spent on Reporting and Evaluation Process

Median Hours Spent on Monitoring, Reporting and Evaluation Process Per Year

	0th (2hrs)	25th (5hrs)	50th (8hrs)	75th (12hrs)	100th (90hrs)

MetroWest 2016	**7hrs** 38th

Custom Cohort

MetroWest 2013	**10hrs**
MetroWest 2010	**11hrs**
MetroWest 2007	**10hrs**
Adolescent Health	**7hrs**
Responsive	**5hrs**
Access to Care	**7hrs**
Healthy Aging	**9hrs**

Cohort: [Custom Cohort ▼]   Past results: ◉ On ○ Off   Subgroup: [Initiative ▼]
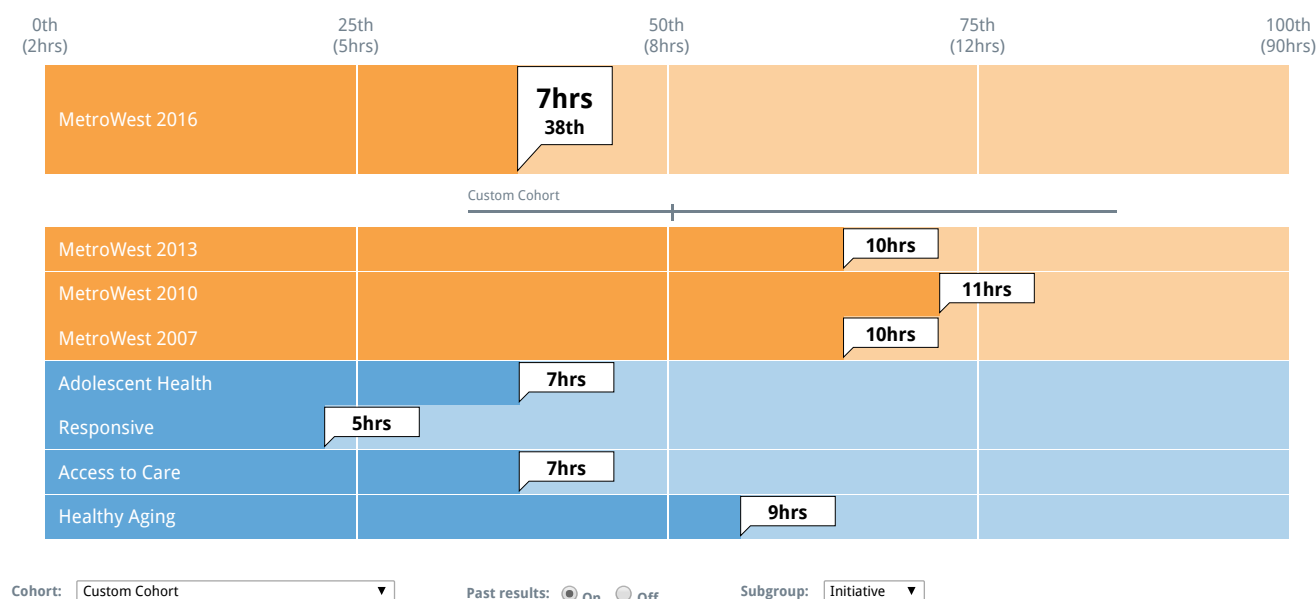
Time Spent On Monitoring, Reporting, And Evaluation Process (Annualized) (Overall)	MetroWest 2016	MetroWest 2013	MetroWest 2010	MetroWest 2007	Average Funder	Custom Cohort
1 to 9 hours	69%	44%	36%	49%	53%	53%
10 to 19 hours	16%	27%	29%	24%	20%	19%
20 to 29 hours	4%	12%	10%	16%	10%	11%
30 to 39 hours	4%	7%	7%	4%	4%	5%
40 to 49 hours	4%	2%	5%	0%	4%	5%
50 to 99 hours	2%	5%	14%	8%	5%	5%
100+ hours	0%	2%	0%	0%	4%	2%

Time Spent On Monitoring, Reporting, And Evaluation Process (Annualized) (By Subgroup)	Adolescent Health	Responsive	Access to Care	Healthy Aging
1 to 9 hours	63%	85%	67%	57%
10 to 19 hours	25%	8%	0%	29%
20 to 29 hours	6%	0%	11%	0%
30 to 39 hours	6%	0%	0%	14%
40 to 49 hours	0%	8%	11%	0%
50 to 99 hours	0%	0%	11%	0%
100+ hours	0%	0%	0%	0%

Non-Monetary Assistance

Grantees were asked to indicate whether they had received any of the following fourteen types of assistance provided directly or paid for by the Foundation.

Management Assistance	Field-Related Assistance	Other Assistance
General management advice	Encouraged/facilitated collaboration	Board development/governance assistance
Strategic planning advice	Insight and advice on your field	Information technology assistance
Financial planning/accounting	Introductions to leaders in field	Communications/marketing/publicity assistance
Development of performance measures	Provided research or best practices	Use of Foundation facilities
	Provided seminars/forums/convenings	Staff/management training

Based on their responses, CEP categorized grantees by the pattern of assistance they received. CEP's analysis shows that providing three or fewer assistance activities is often ineffective; it is only when grantees receive one of the two intensive patterns of assistance described below that they have a substantially more positive experience compared to grantees receiving no assistance.
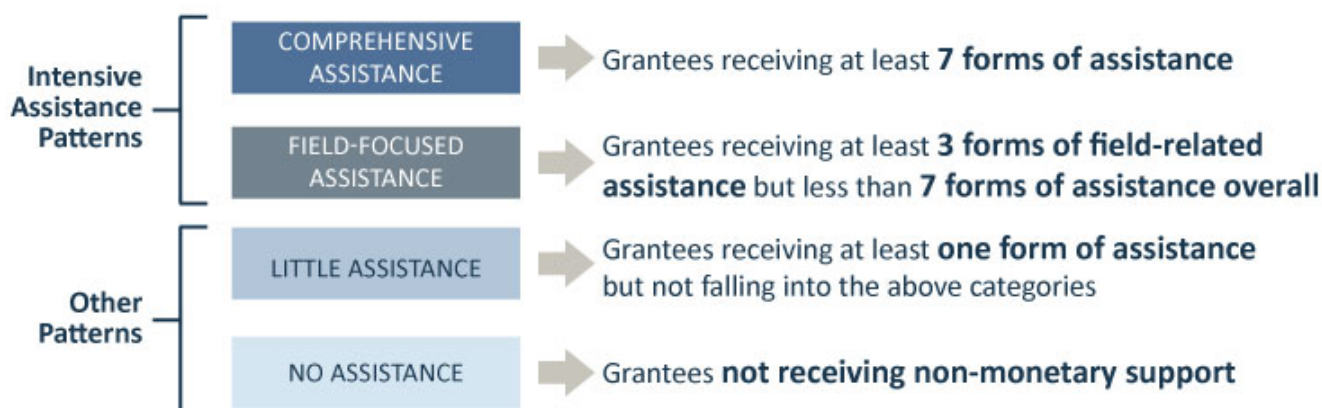
Non-Monetary Assistance Patterns (Overall)	MetroWest 2016	MetroWest 2013	MetroWest 2010	MetroWest 2007	Average Funder	Custom Cohort
Comprehensive	10%	14%	11%	7%	6%	10%
Field-focused	4%	11%	15%	13%	10%	11%
Little	60%	48%	43%	38%	39%	43%
None	25%	27%	32%	42%	45%	36%

Non-Monetary Assistance Patterns (By Subgroup)	Adolescent Health	Responsive	Access to Care	Healthy Aging
Comprehensive	18%	7%	11%	0%
Field-focused	6%	0%	11%	0%
Little	53%	50%	67%	88%
None	24%	43%	11%	13%

Proportion of grantees that received field-focused or comprehensive assistance

	0th (0%)	25th (7%)	50th (15%)	75th (22%)	100th (64%)
MetroWest 2016			15% 50th		
MetroWest 2013				25%	
MetroWest 2010				26%	
MetroWest 2007			20%		
Adolescent Health				24%	
Responsive		7%			
Access to Care				22%	
Healthy Aging	0%				

Cohort: Custom Cohort ▼   Past results: ● On ○ Off   Subgroup: Initiative ▼

Management Assistance Activities

"Please indicate all types of non-monetary assistance, if any, you received (from staff or a third party paid for by the Foundation) associated with this funding."

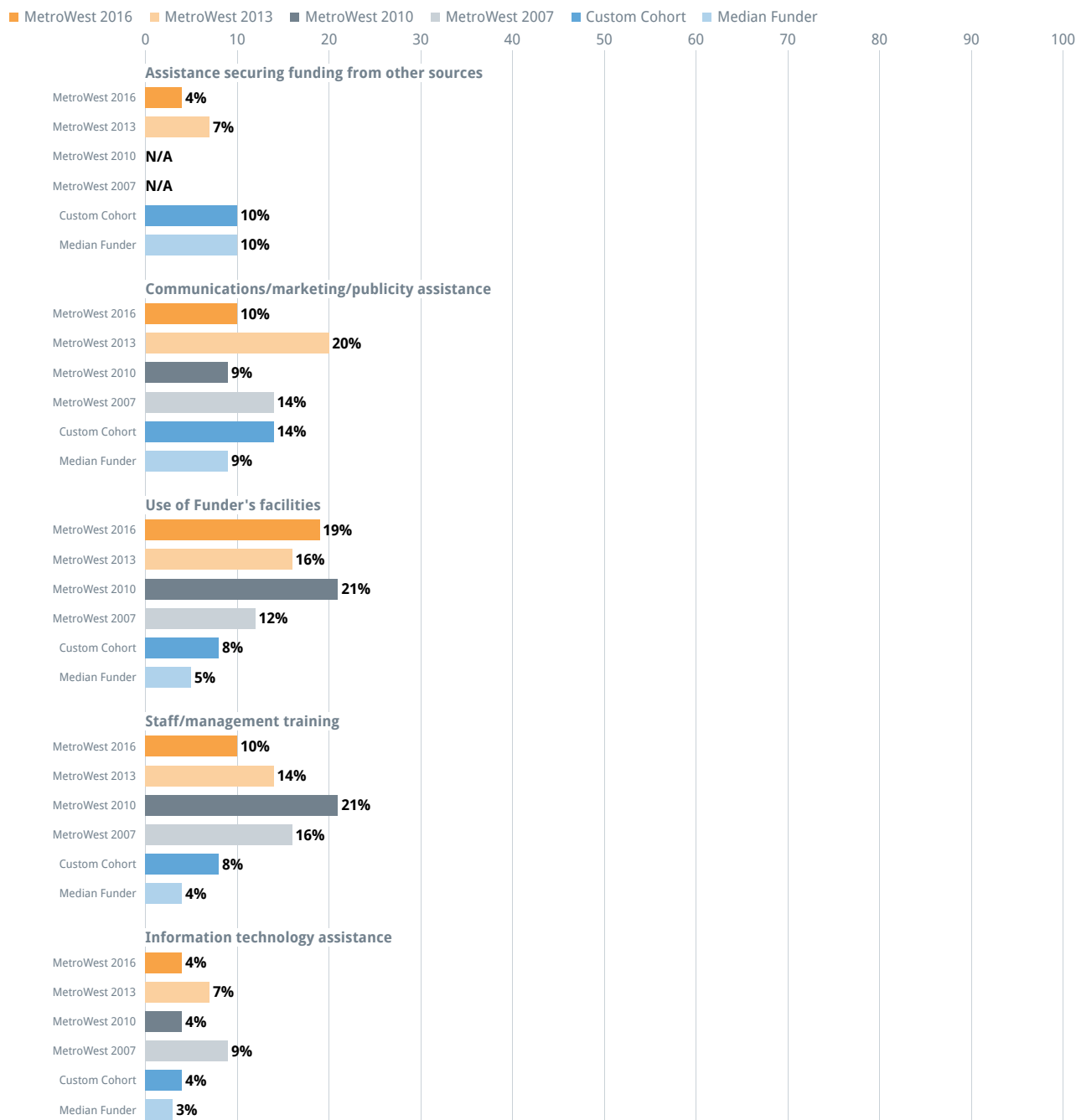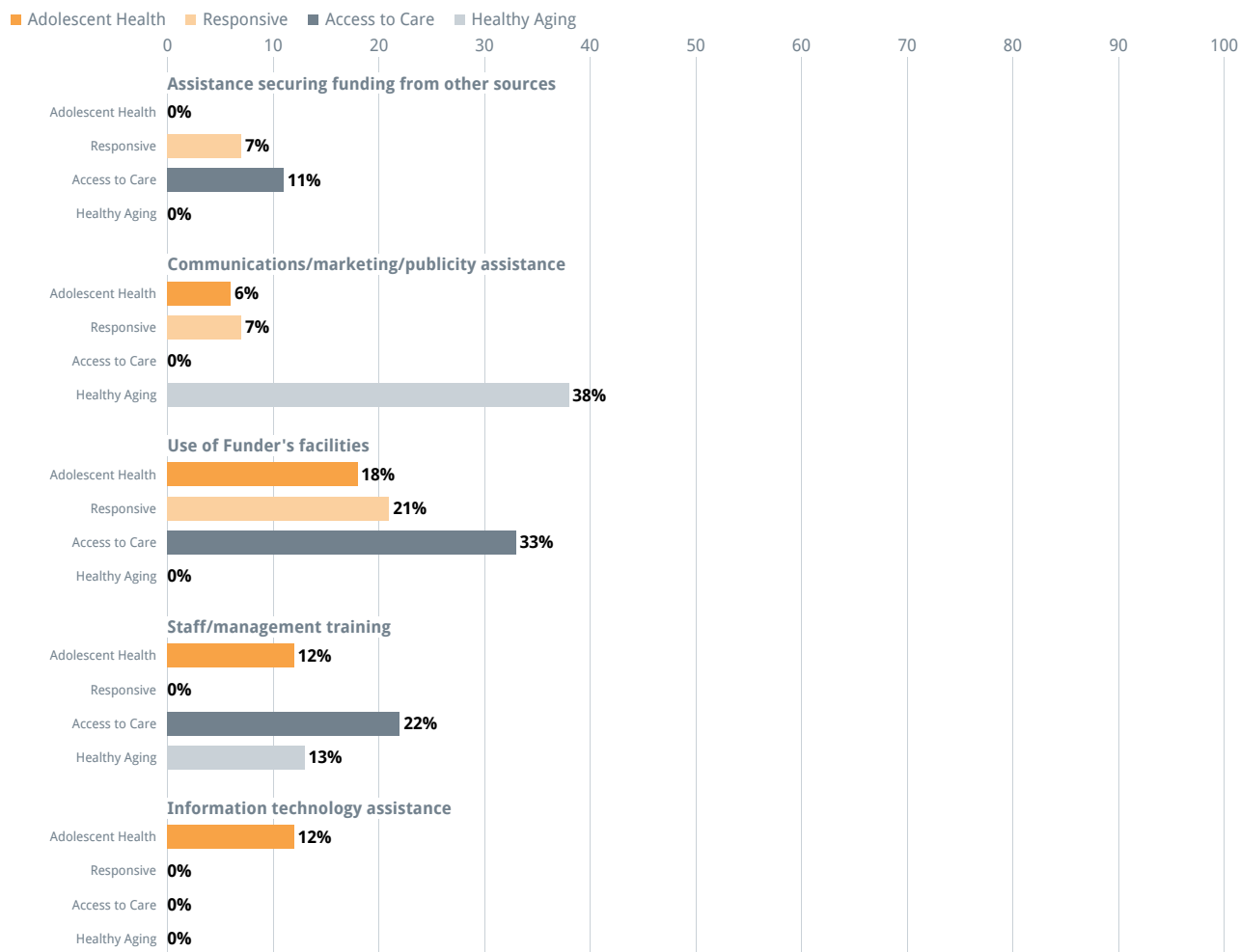## Percentage of Grantees that Received Management Assistance

■ MetroWest 2016　■ MetroWest 2013　■ MetroWest 2010　■ MetroWest 2007　■ Custom Cohort　■ Median Funder

Strategic planning advice

MetroWest 2016	21%
MetroWest 2013	27%
MetroWest 2010	15%
MetroWest 2007	28%
Custom Cohort	22%
Median Funder	18%

General management advice

MetroWest 2016	19%
MetroWest 2013	20%
MetroWest 2010	11%
MetroWest 2007	20%
Custom Cohort	14%
Median Funder	11%

Development of performance measures

MetroWest 2016	31%
MetroWest 2013	27%
MetroWest 2010	28%
MetroWest 2007	32%
Custom Cohort	19%
Median Funder	11%

Financial planning/accounting

MetroWest 2016	8%
MetroWest 2013	7%
MetroWest 2010	13%
MetroWest 2007	9%
Custom Cohort	5%
Median Funder	5%

Percentage of Grantees that Received Management Assistance - By Subgroup

■ Adolescent Health ■ Responsive ■ Access to Care ■ Healthy Aging

Strategic planning advice
- Adolescent Health: 24%
- Responsive: 29%
- Access to Care: 22%
- Healthy Aging: 0%

General management advice
- Adolescent Health: 29%
- Responsive: 21%
- Access to Care: 0%
- Healthy Aging: 13%

Development of performance measures
- Adolescent Health: 41%
- Responsive: 14%
- Access to Care: 22%
- Healthy Aging: 50%

Financial planning/accounting
- Adolescent Health: 18%
- Responsive: 0%
- Access to Care: 0%
- Healthy Aging: 13%

Field-Related Assistance Activities

"Please indicate all types of non-monetary assistance, if any, you received (from staff or a third party paid for by the Foundation) associated with this funding."

Percentage of Grantees that Received Field-Related Assistance

Legend: ■ MetroWest 2016 ■ MetroWest 2013 ■ MetroWest 2010 ■ MetroWest 2007 ■ Custom Cohort ■ Median Funder

(Horizontal axis: 0, 10, 20, 30, 40, 50, 60, 70, 80, 90, 100)

Encouraged/facilitated collaboration

Category	Value
MetroWest 2016	44%
MetroWest 2013	45%
MetroWest 2010	34%
MetroWest 2007	30%
Custom Cohort	41%
Median Funder	30%

Insight and advice on your field

Category	Value
MetroWest 2016	17%
MetroWest 2013	27%
MetroWest 2010	26%
MetroWest 2007	19%
Custom Cohort	19%
Median Funder	22%

Provided seminars/forums/convenings

Category	Value
MetroWest 2016	29%
MetroWest 2013	27%
MetroWest 2010	40%
MetroWest 2007	38%
Custom Cohort	29%
Median Funder	21%

Introduction to leaders in the field

Category	Value
MetroWest 2016	19%
MetroWest 2013	34%
MetroWest 2010	28%
MetroWest 2007	22%
Custom Cohort	18%
Median Funder	18%

Provided research or best practices

Category	Value
MetroWest 2016	17%
MetroWest 2013	23%
MetroWest 2010	17%
MetroWest 2007	22%
Custom Cohort	16%
Median Funder	12%

Percentage of Grantees that Received Field-Related Assistance - By Subgroup

■ Adolescent Health   ■ Responsive   ■ Access to Care   ■ Healthy Aging

Encouraged/facilitated collaboration
- Adolescent Health — 47%
- Responsive — 43%
- Access to Care — 56%
- Healthy Aging — 25%

Insight and advice on your field
- Adolescent Health — 18%
- Responsive — 14%
- Access to Care — 33%
- Healthy Aging — 0%

Provided seminars/forums/convenings
- Adolescent Health — 29%
- Responsive — 14%
- Access to Care — 44%
- Healthy Aging — 38%

Introduction to leaders in the field
- Adolescent Health — 29%
- Responsive — 14%
- Access to Care — 22%
- Healthy Aging — 0%

Provided research or best practices
- Adolescent Health — 18%
- Responsive — 7%
- Access to Care — 22%
- Healthy Aging — 25%

Other Assistance Activities

"Please indicate all types of non-monetary assistance, if any, you received (from staff or a third party paid for by the Foundation) associated with this funding."

Percentage of Grantees that Received Other Assistance

■ MetroWest 2016 ■ MetroWest 2013 ■ MetroWest 2010 ■ MetroWest 2007 ■ Custom Cohort ■ Median Funder

Assistance securing funding from other sources

MetroWest 2016	4%
MetroWest 2013	7%
MetroWest 2010	N/A
MetroWest 2007	N/A
Custom Cohort	10%
Median Funder	10%

Communications/marketing/publicity assistance

MetroWest 2016	10%
MetroWest 2013	20%
MetroWest 2010	9%
MetroWest 2007	14%
Custom Cohort	14%
Median Funder	9%

Use of Funder's facilities

MetroWest 2016	19%
MetroWest 2013	16%
MetroWest 2010	21%
MetroWest 2007	12%
Custom Cohort	8%
Median Funder	5%

Staff/management training

MetroWest 2016	10%
MetroWest 2013	14%
MetroWest 2010	21%
MetroWest 2007	16%
Custom Cohort	8%
Median Funder	4%

Information technology assistance

MetroWest 2016	4%
MetroWest 2013	7%
MetroWest 2010	4%
MetroWest 2007	9%
Custom Cohort	4%
Median Funder	3%

Percentage of Grantees that Received Other Assistance - By Subgroup

■ Adolescent Health ■ Responsive ■ Access to Care ■ Healthy Aging

Assistance securing funding from other sources

Adolescent Health	0%
Responsive	7%
Access to Care	11%
Healthy Aging	0%

Communications/marketing/publicity assistance

Adolescent Health	6%
Responsive	7%
Access to Care	0%
Healthy Aging	38%

Use of Funder's facilities

Adolescent Health	18%
Responsive	21%
Access to Care	33%
Healthy Aging	0%

Staff/management training

Adolescent Health	12%
Responsive	0%
Access to Care	22%
Healthy Aging	13%

Information technology assistance

Adolescent Health	12%
Responsive	0%
Access to Care	0%
Healthy Aging	0%

MetroWest-Specific Questions

"Overall, how satisfied are you with your experience with the Foundation?"

1 = Very dissatisfied   **7** = Extremely satisfied

0th (5.18)	25th (6.19)	50th (6.42)	75th (6.61)	100th (6.91)
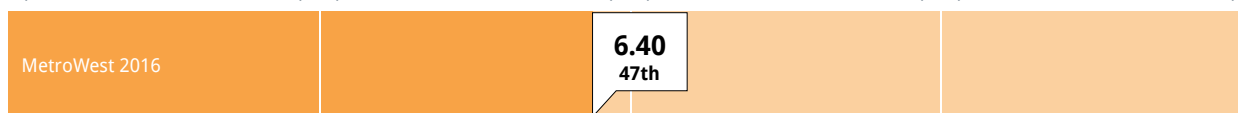
MetroWest 2016 — **6.40** **47th**

Custom Cohort

MetroWest 2013	6.67
MetroWest 2010	6.45
MetroWest 2007	6.59
Adolescent Health	6.29
Responsive	6.36
Access to Care	6.44
Healthy Aging	6.71
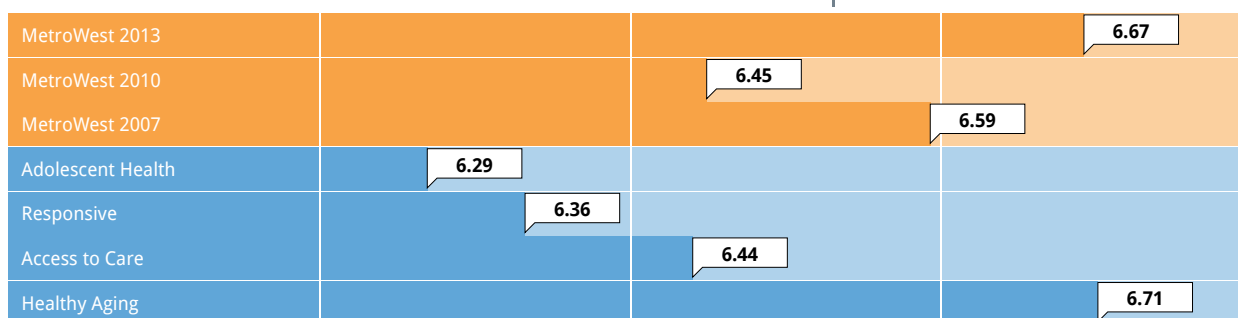
Cohort: Custom Cohort ▼   **Past results:** ◉ On ○ Off   **Subgroup:** Initiative ▼

"To what extent did the Foundation's reputation lend credibility to your efforts to obtain additional funding from other sources?"

1 = No impact   **7** = Significant positive impact

0th (3.93)	25th (5.02)	50th (5.38)	75th (5.72)	100th (6.27)

MetroWest 2016 — **5.28** **45th**

Custom Cohort

MetroWest 2010	5.02
MetroWest 2007	3.70
Adolescent Health	5.07
Responsive	5.86
Access to Care	4.78
Healthy Aging	5.25
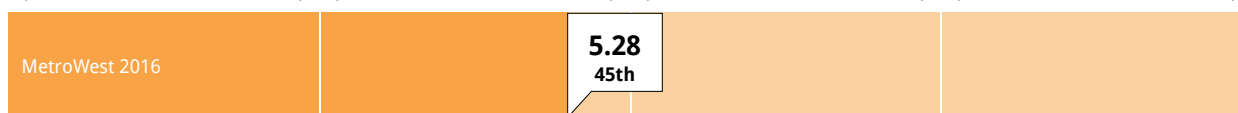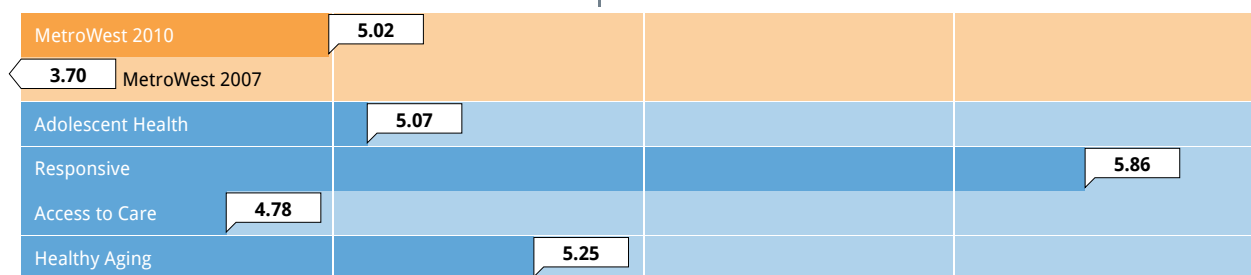
Cohort: Custom Cohort ▼   **Past results:** ◉ On ○ Off   **Subgroup:** Initiative ▼

Print and Online Communications

"How informative have the following Foundation print and online communications been to your work?" - Overall

1 = Not informative   **7** = Highly informative
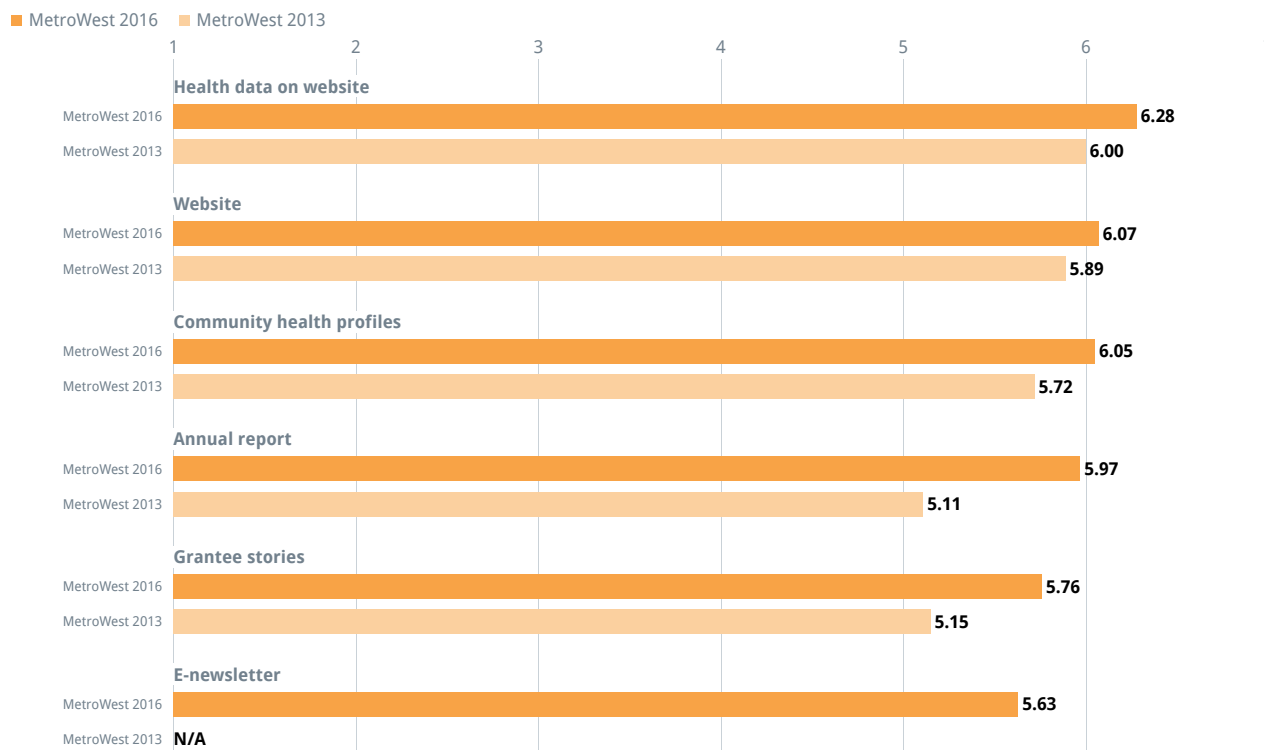
■ MetroWest 2016   ■ MetroWest 2013

Health data on website
MetroWest 2016: 6.28
MetroWest 2013: 6.00

Website
MetroWest 2016: 6.07
MetroWest 2013: 5.89

Community health profiles
MetroWest 2016: 6.05
MetroWest 2013: 5.72

Annual report
MetroWest 2016: 5.97
MetroWest 2013: 5.11

Grantee stories
MetroWest 2016: 5.76
MetroWest 2013: 5.15

E-newsletter
MetroWest 2016: 5.63
MetroWest 2013: N/A

56

"How informative have the following Foundation print and online communications been to your work?" - By Subgroup

1 = Not informative   **7** = Highly informative

■ Adolescent Health   ■ Responsive   ■ Access to Care   ■ Healthy Aging

Health data on website

Subgroup	Score
Adolescent Health	6.38
Responsive	6.00
Access to Care	6.25
Healthy Aging	6.57

Website

Subgroup	Score
Adolescent Health	6.20
Responsive	5.92
Access to Care	6.11
Healthy Aging	6.00

Community health profiles

Subgroup	Score
Adolescent Health	6.08
Responsive	5.90
Access to Care	6.00
Healthy Aging	6.25

Annual report

Subgroup	Score
Adolescent Health	5.85
Responsive	5.55
Access to Care	6.25
Healthy Aging	6.50

Grantee stories

Subgroup	Score
Adolescent Health	6.00
Responsive	5.50
Access to Care	5.25
Healthy Aging	6.29

E-newsletter

Subgroup	Score
Adolescent Health	5.79
Responsive	5.85
Access to Care	5.25
Healthy Aging	5.38

MetroWest's Online Services

"How easy to use were the following online services?" - Overall

1 = Not easy to use   **7** = Very easy to use

■ MetroWest 2016   ■ MetroWest 2013

Online application
- MetroWest 2016: **5.63**
- MetroWest 2013: **6.18**

Online reporting
- MetroWest 2016: **5.54**
- MetroWest 2013: **5.81**

Grantee portal
- MetroWest 2016: **5.29**
- MetroWest 2013: **5.67**
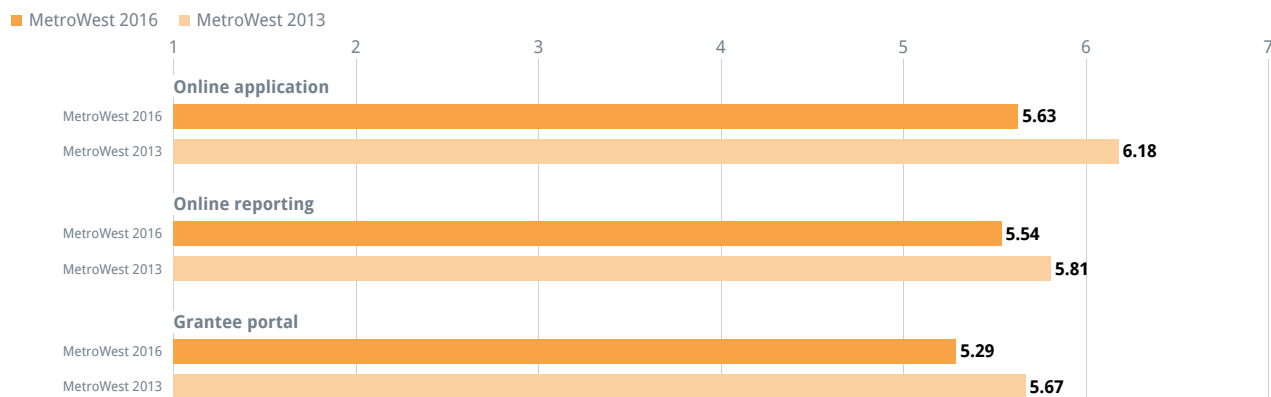
"How easy to use were the following online services?" - By Subgroup

1 = Not easy to use   **7** = Very easy to use
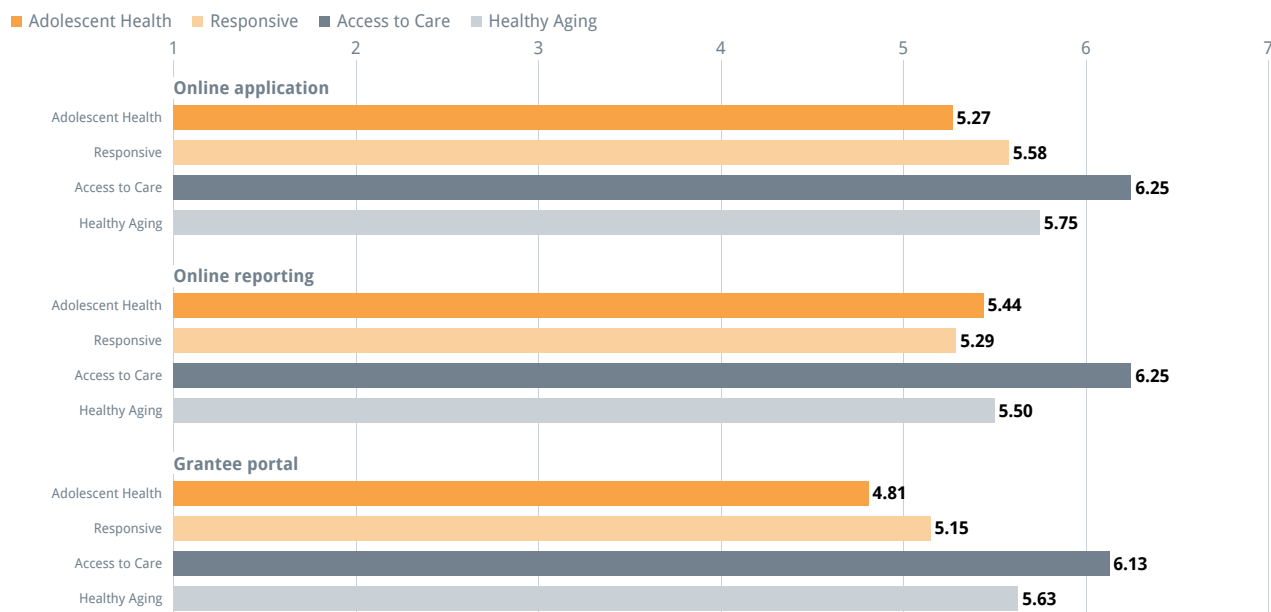
■ Adolescent Health   ■ Responsive   ■ Access to Care   ■ Healthy Aging

Online application
- Adolescent Health: **5.27**
- Responsive: **5.58**
- Access to Care: **6.25**
- Healthy Aging: **5.75**

Online reporting
- Adolescent Health: **5.44**
- Responsive: **5.29**
- Access to Care: **6.25**
- Healthy Aging: **5.50**

Grantee portal
- Adolescent Health: **4.81**
- Responsive: **5.15**
- Access to Care: **6.13**
- Healthy Aging: **5.63**

"If you experienced a problem with any of the following online services, were you able to receive assistance from the Foundation to addresses these issues or problems?" - Overall

Online application (Overall)	MetroWest 2016
Yes, I experienced an issue and did receive assistance to address it.	42%
No, I experienced an issue and did not receive assistance to address it.	2%
Not applicable - I did not have an issue	56%

Grantee portal (Overall)	MetroWest 2016
Yes, I experienced an issue and did receive assistance to address it.	55%
No, I experienced an issue and did not receive assistance to address it.	0%
Not applicable - I did not have an issue	45%

Reporting Process (Overall)	MetroWest 2016
Yes, I experienced an issue and did receive assistance to address it.	51%
No, I experienced an issue and did not receive assistance to address it.	0%
Not applicable - I did not have an issue	49%

"If you experienced a problem with any of the following online services, were you able to receive assistance from the Foundation to addresses these issues or problems?" - By Subgroup

Online application (By Subgroup)	Adolescent Health	Responsive	Access to Care	Healthy Aging
Yes, I experienced an issue and did receive assistance to address it.	53%	42%	11%	57%
No, I experienced an issue and did not receive assistance to address it.	0%	8%	0%	0%
Not applicable - I did not have an issue	47%	50%	89%	43%

Grantee portal (By Subgroup)	Adolescent Health	Responsive	Access to Care	Healthy Aging
Yes, I experienced an issue and did receive assistance to address it.	53%	62%	33%	71%
No, I experienced an issue and did not receive assistance to address it.	0%	0%	0%	0%
Not applicable - I did not have an issue	47%	38%	67%	29%

Reporting Process (By Subgroup)	Adolescent Health	Responsive	Access to Care	Healthy Aging
Yes, I experienced an issue and did receive assistance to address it.	67%	50%	22%	57%
No, I experienced an issue and did not receive assistance to address it.	0%	0%	0%	0%
Not applicable - I did not have an issue	33%	50%	78%	43%

Grantee Suggestions for the Foundation

Grantees were asked to provide any suggestions for how the Foundation could improve. These suggestions were then categorized by CEP and grouped into the topics below.

To download the full set of grantee comments and suggestions, please refer to the "Downloads" dropdown menu at the top right of your report. Please note that comments have been edited or deleted to protect the confidentiality of respondents.

Proportion of Grantee Suggestions by Topic

Topic of Grantee Suggestion	%
Impact on and Understanding of Grantee Organizations	24%
Grantmaking Characteristics	24%
Administrative Processes	18%
Clarity and Consistency of Communications	12%
Impact on and Understanding of Grantees' Fields	12%
Other	12%

Selected Comments

Grantees were asked to provide any suggestions for how the Foundation could improve. These suggestions were then categorized by CEP and grouped into the topics below.

Impact on and Understanding of Grantee Organizations (24%)

- **Sustainability (N=4)**
  - "It would be helpful for the Foundation to provide more guidance to both individual grantees as well as the community of grantees on the issue of sustainability rather than simply asking the grantees for how they plan to sustain the program."
  - "Longer term, sustainable funding is always a challenge, especially for smaller non-profits. Other creative ways and advice on sustaining programs is always welcome, but understandably, not MWHF's role."
  - "More individualized support for sustainability."
  - "More assistance with planning for sustainability."

Grantmaking Characteristics (24%)

- **Length (N=3)**
  - "Provide continuing funding to worthy projects - even at a lower level."
  - "Provide ongoing funding for successful existing programs."
  - "While I understand the limitations that Foundations have in supporting programs for the long haul, there are times when programs are extremely successful and there is no immediate apparent source of funding for the continuation."

- **Size (N=1)**
  - "Increase the cap on yearly funding."

Administrative Processes (18%)

- **Proposal and Selection (N=2)**
  - "Have the ability to override the committee's decisions (perhaps if certain guidelines were developed, the committee had an advisory role instead of an absolute role, or if agencies had the ability to either address committee's concerns or appeal decisions)."
  - "I know time is tight but maybe the various grant panels would benefit from some basic info on the barriers to health care that people face."

- **Reporting and Evaluation Process (N=1)**
  - "The reporting process is a bit arduous - perhaps that could be adjusted a bit (the logic model approach is tricky, and the financial reporting is very very detailed)."

Clarity and Consistency of Communications (12%)

- **Website (N=2)**
  - "The website is often difficult to utilize when uploading reports."
  - "Website design."

Impact on and Understanding of Grantees' Fields (12%)

- **Advancing Knowledge (N=1)**
  - "It would also be helpful to have the Foundation's voice at the table in the health care reform debate so that successful and needed programs once tested through Foundation funds can get needed funding over time."

- **Other (N=1)**
  - "Allow for a broader area of funding categories/grant areas (right now the "responsive" grants are a decent catch-all, but I'd love to see quality assurance/quality improvement as a category for local public health, as well as an accreditation support category)."

Other (12%)

- "If staff is expanded, they could get involved more in the operations of the grants."
- "Not requiring so much data on research and best practices."

Contextual Data

Grantmaking Characteristics

Length of Grant Awarded (Overall)	MetroWest 2016	MetroWest 2013	MetroWest 2010	MetroWest 2007	Median Funder	Custom Cohort
Average grant length	2.6 years	2.3 years	2.4 years	1.8 years	2.2 years	2.0 years

Length of Grant Awarded (Overall)	MetroWest 2016	MetroWest 2013	MetroWest 2010	MetroWest 2007	Average Funder	Custom Cohort
1 year	17%	36%	30%	57%	47%	46%
2 years	26%	20%	17%	15%	23%	22%
3 years	53%	34%	36%	22%	18%	22%
4 years	2%	5%	15%	3%	4%	3%
5 or more years	2%	5%	2%	3%	8%	7%

Type of Grant Awarded (Overall)	MetroWest 2016	MetroWest 2013	MetroWest 2010	MetroWest 2007	Average Funder	Custom Cohort
Program / Project Support	88%	91%	96%	78%	64%	71%
General Operating / Core Support	6%	0%	0%	1%	21%	13%
Capital Support: Building / Renovation / Endowment Support / Other	2%	9%	0%	3%	6%	5%
Technical Assistance / Capacity Building	2%	0%	4%	18%	4%	8%
Scholarship / Fellowship	2%	0%	0%	0%	2%	1%
Event / Sponsorship Funding	0%	0%	0%	0%	2%	2%

Grantmaking Characteristics - By Subgroup

Length of Grant Awarded (By Subgroup)	Adolescent Health	Responsive	Access to Care	Healthy Aging
Average grant length	2.7 years	1.9 years	3.7 years	2.3 years

Length of Grant Awarded (By Subgroup)	Adolescent Health	Responsive	Access to Care	Healthy Aging
1 year	6%	36%	11%	14%
2 years	24%	29%	11%	43%
3 years	65%	36%	67%	43%
4 years	6%	0%	0%	0%
5 or more years	0%	0%	11%	0%

Type of Grant Awarded (By Subgroup)	Adolescent Health	Responsive	Access to Care	Healthy Aging
Program / Project Support	94%	86%	89%	75%
General Operating / Core Support	0%	0%	11%	25%
Capital Support: Building / Renovation / Endowment Support / Other	0%	7%	0%	0%
Technical Assistance / Capacity Building	6%	0%	0%	0%
Scholarship / Fellowship	0%	7%	0%	0%
Event / Sponsorship Funding	0%	0%	0%	0%

Grant Size

Grant Amount Awarded (Overall)	MetroWest 2016	MetroWest 2013	MetroWest 2010	MetroWest 2007	Median Funder	Custom Cohort
Median grant size	$83K	$50K	$60K	$50K	$75K	$48K

Grant Amount Awarded (Overall)	MetroWest 2016	MetroWest 2013	MetroWest 2010	MetroWest 2007	Average Funder	Custom Cohort
Less than $10K	9%	12%	5%	12%	10%	10%
$10K - $24K	18%	20%	21%	10%	13%	16%
$25K - $49K	11%	15%	16%	22%	13%	17%
$50K - $99K	20%	22%	28%	23%	16%	22%
$100K - $149K	14%	10%	12%	7%	9%	9%
$150K - $299K	18%	17%	9%	16%	15%	12%
$300K - $499K	2%	2%	5%	7%	8%	7%
$500K - $999K	5%	2%	2%	1%	7%	4%
$1MM and above	2%	0%	2%	1%	8%	3%

Median Percent of Budget Funded by Grant (Annualized) (Overall)	MetroWest 2016	MetroWest 2013	MetroWest 2010	MetroWest 2007	Median Funder	Custom Cohort
Size of grant relative to size of grantee budget	3%	1%	1%	2%	4%	3%

Grant Size - By Subgroup

Grant Amount Awarded (By Subgroup)	Adolescent Health	Responsive	Access to Care	Healthy Aging
Median grant size	$150K	$20K	$148K	$38K

Grant Amount Awarded (By Subgroup)	Adolescent Health	Responsive	Access to Care	Healthy Aging
Less than $10K	13%	15%	0%	0%
$10K - $24K	0%	46%	13%	14%
$25K - $49K	6%	8%	0%	43%
$50K - $99K	25%	15%	25%	14%
$100K - $149K	6%	15%	13%	29%
$150K - $299K	25%	0%	50%	0%
$300K - $499K	6%	0%	0%	0%
$500K - $999K	13%	0%	0%	0%
$1MM and above	6%	0%	0%	0%

Median Percent of Budget Funded by Grant (Annualized) (By Subgroup)	Adolescent Health	Responsive	Access to Care	Healthy Aging
Size of grant relative to size of grantee budget	1%	3%	2%	3%

Grantee Characteristics

Operating Budget of Grantee Organization (Overall)	MetroWest 2016	MetroWest 2013	MetroWest 2010	MetroWest 2007	Median Funder	Custom Cohort
Median Budget	$1.7M	$3.0M	$2.0M	$1.9M	$1.5M	$1.3M

Operating Budget of Grantee Organization (Overall)	MetroWest 2016	MetroWest 2013	MetroWest 2010	MetroWest 2007	Average Funder	Custom Cohort
<$100K	10%	6%	9%	15%	9%	10%
$100K - $499K	21%	29%	29%	21%	20%	23%
$500K - $999K	13%	6%	6%	6%	14%	13%
$1MM - $4.9MM	18%	11%	18%	21%	29%	24%
$5MM - $24MM	21%	20%	29%	25%	18%	19%
>=$25MM	18%	29%	9%	12%	11%	11%

Grantee Characteristics - By Subgroup

Operating Budget of Grantee Organization (By Subgroup)	Adolescent Health	Responsive	Access to Care	Healthy Aging
Median Budget	$11.0M	$0.6M	$5.0M	$0.6M

Operating Budget of Grantee Organization (By Subgroup)	Adolescent Health	Responsive	Access to Care	Healthy Aging
<$100K	18%	14%	0%	0%
$100K - $499K	0%	29%	14%	43%
$500K - $999K	9%	14%	14%	14%
$1MM - $4.9MM	18%	21%	14%	14%
$5MM - $24MM	27%	14%	29%	14%
>=$25MM	27%	7%	29%	14%

Funding Relationship

Pattern of Grantees' Funding Relationship with the Foundation (Overall)	MetroWest 2016	MetroWest 2013	MetroWest 2010	Average Funder	Custom Cohort
First grant received from the Foundation	27%	33%	23%	29%	28%
Consistent funding in the past	50%	52%	57%	52%	51%
Inconsistent funding in the past	23%	14%	19%	19%	21%

Funding Status and Grantees Previously Declined Funding (Overall)	MetroWest 2016	MetroWest 2013	MetroWest 2010	MetroWest 2007	Median Funder	Custom Cohort
Percent of grantees currently receiving funding from the Foundation	71%	68%	67%	78%	80%	71%
Percent of grantees previously declined funding by the Foundation	61%	66%	59%	46%	32%	46%

Funding Relationship - By Subgroup

Pattern of Grantees' Funding Relationship with the Foundation (By Subgroup)	Adolescent Health	Responsive	Access to Care	Healthy Aging
First grant received from the Foundation	35%	43%	0%	13%
Consistent funding in the past	59%	14%	67%	75%
Inconsistent funding in the past	6%	43%	33%	13%

Funding Status and Grantees Previously Declined Funding (By Subgroup)	Adolescent Health	Responsive	Access to Care	Healthy Aging
Percent of grantees currently receiving funding from the Foundation	94%	29%	100%	63%
Percent of grantees previously declined funding by the Foundation	50%	62%	88%	50%

Grantee Demographics

Job Title of Respondents (Overall)	MetroWest 2016	MetroWest 2013	MetroWest 2010	MetroWest 2007	Average Funder	Custom Cohort
Executive Director	23%	20%	20%	18%	47%	44%
Other Senior Management	17%	20%	20%	21%	15%	14%
Project Director	32%	34%	34%	38%	12%	16%
Development Director	6%	7%	4%	3%	9%	7%
Other Development Staff	4%	2%	4%	1%	7%	6%
Volunteer	0%	0%	0%	0%	1%	3%
Other	17%	16%	18%	18%	9%	10%

Gender of Respondents (Overall)	MetroWest 2016	MetroWest 2013	MetroWest 2010	MetroWest 2007	Average Funder	Custom Cohort
Female	78%	79%	85%	69%	64%	70%
Male	22%	21%	15%	31%	36%	30%

Race/Ethnicity of Respondents (Overall)	MetroWest 2016	MetroWest 2013	MetroWest 2010	MetroWest 2007	Average Funder	Custom Cohort
Multi-racial	0%	0%	0%	0%	3%	2%
African-American/Black	0%	2%	0%	3%	7%	9%
Asian (incl. Indian subcontinent)	2%	5%	0%	2%	3%	2%
Hispanic/Latino	5%	12%	8%	2%	5%	2%
American Indian/Alaskan Native	0%	0%	0%	0%	1%	0%
Pacific Islander	0%	0%	0%	0%	0%	0%
Caucasian/White	93%	81%	92%	94%	80%	83%
Other	0%	0%	0%	0%	1%	1%

Funder Characteristics

Financial Information (Overall)	MetroWest 2016	MetroWest 2013	MetroWest 2010	MetroWest 2007	Median Funder	Custom Cohort
Total assets	$95.8M	$94.0M	$86.6M	$107.8M	$226.2M	$125.8M
Total giving	$2.4M	$2.1M	$3.9M	$3.9M	$14.5M	$4.4M

Funder Staffing (Overall)	MetroWest 2016	MetroWest 2013	MetroWest 2010	MetroWest 2007	Median Funder	Custom Cohort
Total staff (FTEs)	4	4	4	4	14	9
Percent of staff who are program staff	43%	43%	74%	74%	40%	44%

Grantmaking Processes (Overall)	MetroWest 2016	MetroWest 2013	MetroWest 2010	Median Funder	Custom Cohort
Proportion of grants that are proactive	66%	60%	50%	45%	45%
Proportion of grantmaking dollars that are proactive	81%	81%	50%	60%	59%

Additional Measures

In the following questions, we use the term "beneficiaries" to refer to those your organization seeks to serve through the services and/or programs it provides. Beneficiaries are often called end users, clients, or participants.

The following questions were recently added to the grantee survey and depict comparative data from fewer than one-third of funders in the dataset.

"How well does the Foundation understand your intended beneficiaries' needs?"

1 = Limited understanding	7 = Thorough understanding

0th (4.00)	25th (5.44)	50th (5.69)	75th (5.85)	100th (6.27)

MetroWest 2016 — **5.91** / **83rd**

Adolescent Health — 5.60
Responsive — 5.75
Access to Care — 6.22
Healthy Aging — 6.38
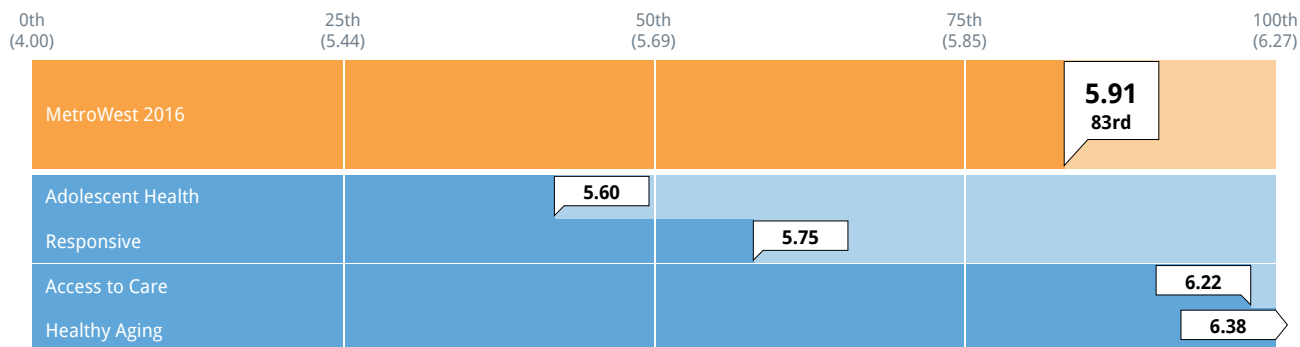
Cohort: None ▼   Past results: ⦿ On ○ Off   Subgroup: Initiative ▼

"To what extent do the Foundation's funding priorities reflect a deep understanding of your intended beneficiaries' needs?"

1 = Not at all	7 = To a great extent

0th (3.77)	25th (5.34)	50th (5.50)	75th (5.76)	100th (6.38)

MetroWest 2016 — **5.50** / **50th**

Adolescent Health — 5.60
Responsive — 5.08
Access to Care — 5.67
Healthy Aging — 5.75
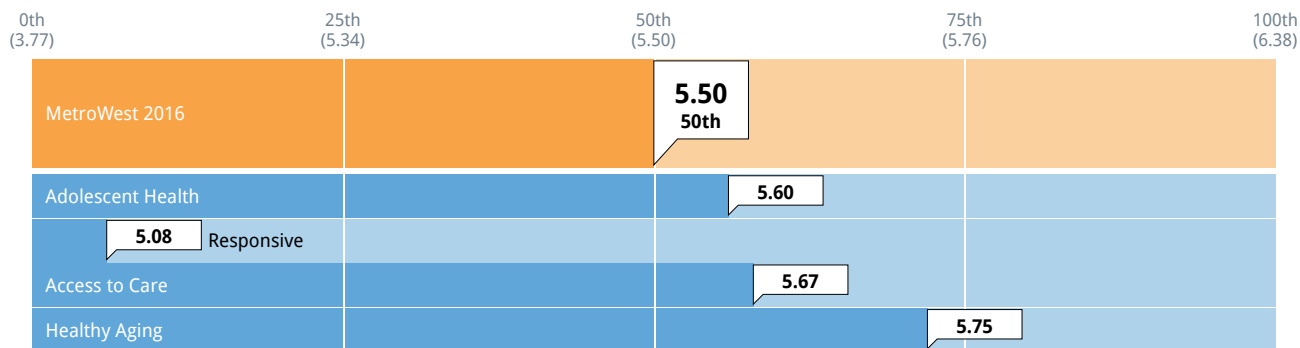
Cohort: None ▼   Past results: ⦿ On ○ Off   Subgroup: Initiative ▼

Additional Survey Information

On many questions in the grantee survey, grantees are allowed to select "don't know" or "not applicable" if they are not able to provide an alternative answer. In addition, some questions in the survey are only displayed to a select group of grantees for which that question is relevant based on a previous response.

As a result, there are some measures where only a subset of responses is included in the reported results. The table below shows the number of responses included on each of these measures. The total number of respondents to MetroWest's grantee survey was 48.

Core Question Text	Count of Responses
Overall, how would you rate the Foundation's impact on your field?	48
How well does the Foundation understand the field in which you work?	48
To what extent has the Foundation advanced the state of knowledge in your field?	41
To what extent has the Foundation affected public policy in your field?	33
Overall, how would you rate the Foundation's impact on your local community?	45
How well does the Foundation understand the local community in which you work?	46
How well does the Foundation understand the social, cultural, or socioeconomic factors that affect your work?	46
How much, if at all, did the Foundation improve your ability to sustain the work funded by this grant in the future?	44
How well does the Foundation understand your organization's strategy and goals?	47
Which of the following statements best describes the primary effect the receipt of this grant had on your organization's programs or operations?	47
How consistent was the information provided by different communication resources, both personal and written, that you used to learn about the Foundation?	43
Who most frequently initiated the contact you had with your program officer during this grant?	47
Did the Foundation conduct a site visit during the selection process or during the course of this grant?	44
Has your main contact at the Foundation changed in the past six months?	43
Did you submit a proposal to the Foundation for this grant?	48
As you developed your grant proposal, how much pressure did you feel to modify your organization's priorities in order to create a grant proposal that was likely to receive funding?	42
How involved was Foundation staff in the development of your grant proposal?	42
How much time elapsed from the submission of the grant proposal to clear commitment of funding?	37
Was there or will there be a reporting/evaluation process?	48
Was an external evaluator involved in your reporting/evaluation process?	38
After submission of your report/evaluation, did the Foundation or the evaluator discuss it with you?	41
At any point during the application or the grant period, did the Foundation and your organization exchange ideas regarding how your organization would assess the results of the work funded by this grant?	43
Have you ever been declined funding from the Foundation?	41
Are you currently receiving funding from the Foundation?	48
Which of the following best describes the pattern of your organization's funding relationship with the Foundation?	48
How well does the Foundation understand your intended beneficiaries' needs?	44
To what extent do the Foundation's funding priorities reflect a deep understanding of your intended beneficiaries' needs?	44
How easy to use were the following online services? - Online application	43
How easy to use were the following online services? - Grantee portal	45
How easy to use were the following online services? - Online reporting	46
How informative have the following Foundation print and online communications been to your work? - Annual report	40
How informative have the following Foundation print and online communications been to your work? - Community health profiles	38
How informative have the following Foundation print and online communications been to your work? - Grantee stories	42
How informative have the following Foundation print and online communications been to your work? - Health data on website	39
How informative have the following Foundation print and online communications been to your work? - Website	44
How informative have the following Foundation print and online communications been to your work? - E-newsletter	43
If you experienced a problem with any of the following online services, were you able to receive assistance from the Foundation to addresses these issues or problems? - Online application	43

About CEP and Contact Information

Mission:

To provide data and create insight so philanthropic funders can better define, assess, and improve their effectiveness – and, as a result, their intended impact.

Vision:

We seek a world in which pressing social needs are more effectively addressed.

We believe improved performance of philanthropic funders can have a profoundly positive impact on nonprofit organizations and the people and communities they serve.

Although our work is about measuring results, providing useful data, and improving performance, our ultimate goal is improving lives. We believe this can only be achieved through a powerful combination of dispassionate analysis and passionate commitment to creating a better society.

About the GPR

Since 2003, the Grantee Perception Report® (GPR) has provided funders with comparative, candid feedback based on grantee perceptions. The GPR is the only grantee survey process that provides comparative data, and is based on extensive research and analysis. Hundreds of funders of all types and sizes have commissioned the GPR, and tens of thousands of grantees have provided their perspectives to help funders improve their work. CEP has surveyed grantees in more than 150 countries and in 8 different languages.

The GPR's quantitative and qualitative data helps foundation leaders evaluate and understand their grantees' perceptions of their effectiveness, and how that compares to their philanthropic peers.

Contact Information

Jenny Goff, Manager, Assessment and Advisory Services
(617) 492-0800 ext. 244
jennyg@effectivephilanthropy.org

Della Menhaj, Analyst, Assessment and Advisory Services
(617) 492-0800 ext. 167
dellam@effectivephilanthropy.org

THE CENTER FOR
EFFECTIVE PHILANTHROPY