

Grantee Perception Report®

prepared for the

Lumina Foundation for Education

July 2005

Summary of Findings for Board of Directors



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Summary of Findings (1)

- ♦ The following page contains eleven measures that capture the main themes of The Center for Effective Philanthropy's (CEP) 2005 and, where possible, 2003 survey of Lumina Foundation grant recipients.
 - These areas were selected for this summary by CEP because many grantees and foundations have indicated that each is an important area of foundation effectiveness.
 - Additionally, the quality of interactions and clarity of communications of goals and strategy are strong predictors of grantee satisfaction and perceptions of foundations' impact.
 - Results in each area must be interpreted in light of Lumina Foundation's specific goals and strategy.
- ♦ In six of eleven areas, Lumina Foundation approaches or surpasses the 75th percentile among all foundations on which the Center has collected relevant data in the past several years.

<ul style="list-style-type: none"> • Impact on the grantees' fields • Clarity of communication of the Foundation's goals and strategy • Provision of non-monetary assistance 	<ul style="list-style-type: none"> • Dollars received by grantees per grantee administrative hour spent on grant requirements • Helpfulness of the selection process in strengthening the grantee or program funded • Helpfulness of the reporting/evaluation process in strengthening the grantee or program funded
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- ♦ Lumina Foundation's ratings have statistically significantly improved since 2003 in the areas of impact on the field and impact on the grantee¹. In three other areas on which there is a change in Lumina Foundation percentile ranking, the changes are not statistically significant and represent only small changes in absolute rating.
- ♦ On the area of impact on grantees' local communities, Lumina Foundation is rated less positively than most foundations. This finding may not be a negative finding: it may be confirming that Lumina Foundation is following its strategy of focusing on fields of funding (e.g. access to higher education) rather than geographic communities. In fact across the field, expertise in a field of funding is a negative predictor of impact on grantees' local communities.
- ♦ Two areas, impact on the grantee and assistance securing funding from other sources, are highlighted as areas for discussion: what are Lumina Foundation's goals in these areas and how can they be achieved?

Summary of Findings (2)

Chart shows Lumina's 2005 (◆) and 2003 (◇) percentile ranks among all 142 foundations in comparative set.



Indicator	Percentile					Description					
	0th	25th	50th	75th	100th						
Impact on the Field						Grantees were asked to rate the foundation's impact on their fields.					
Impact on the Community						Grantees were asked to rate the foundation's impact on their local communities.					
Impact on the Grantee Organization						Grantees were asked to rate the foundation's impact on their organizations.					
Satisfaction	<p>Note: Although Lumina's percentile has changed for these indicators, these differences translate to only small changes in absolute ratings. These changes are not statistically significant</p>					Grantees were asked to rate their overall satisfaction with their funder.					
Interactions											This summary includes grantee ratings of foundation fairness, responsiveness, and grantee comfort approaching the foundation if a problem arises.
Clarity of Communications of Goals and Strategy											Grantees were asked to rate the clarity of the foundation's communication of its goals and strategy.
Non-Monetary Assistance ¹						This summary includes the frequency of provision and ratings of helpfulness of 15 individual activities, including management and field-related assistance.					
Assistance Securing Funding from Other Sources ¹						This summary includes the frequency of provision of foundation assistance in obtaining funding from other sources, and ratings of the impact of those efforts.					
Dollar Return on Grantee Administrative Hours ¹						This summary is calculated by dividing the dollar value of individual grants by the time required of grantees to fulfill the foundation's administrative requirements.					
Selection Process ¹						Grantees were asked to rate the helpfulness of the foundation's selection process for their organizations.					
Reporting and Evaluation Processes ¹						Grantees were asked to rate the helpfulness of the foundation's reporting and evaluation processes for their organizations.					

2 1: Lumina 2003 percentile rank not available because of changes to the survey instrument between rounds. Fewer than 142 foundations are included in this percentile ranking because of reduced historical data (see expanded report).